EndNote X7 (Word 2013)

Learning objectives:

At the end of the course you will be able to:

- Use EndNote to store details of material you have read
- Import records from Library databases
- Use the group options to manage references
- Insert citations from EndNote into a Word document
- Format and unformat the citations in your Word document
- Create a bibliography from EndNote

Need more help with EndNote?

TRY ... http://www.library.auckland.ac.nz/endnote/endnote.htm **... OR ...** http://www.endnote.com

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PART ONE

What is EndNote?

EndNote is a specialised database program for storing and managing bibliographic references. It allows you to copy references from Library catalogues and bibliographic databases. You can add your own notes, rankings, subject headings, and useful quotations to the references. The references can be sorted and searched, and incorporated automatically into papers for publication. EndNote makes writing academic papers easier, not only by saving you time, but also by ensuring your references are cited consistently.

EndNote Library

> **EndNote Terminology**
>
> An EndNote file is called a library. It is a database containing a separate record for each reference. Each record is made up of several fields containing specific pieces of information.

To create a new library:

1.   Open the EndNote programme from the menu:
      Start >> Programs >> EndNote >> EndNote Program (if you get a screen pop-up asking you to create an EndNote Web account – click cancel)
2.   Click the image next to the option **Create a new EndNote library**. EndNote will present a dialog box to name and save the file.
3.   Enter a name for your new library in the **File name** area.
4.   Click **Save**. In this tutorial your library should be saved to the Desktop.
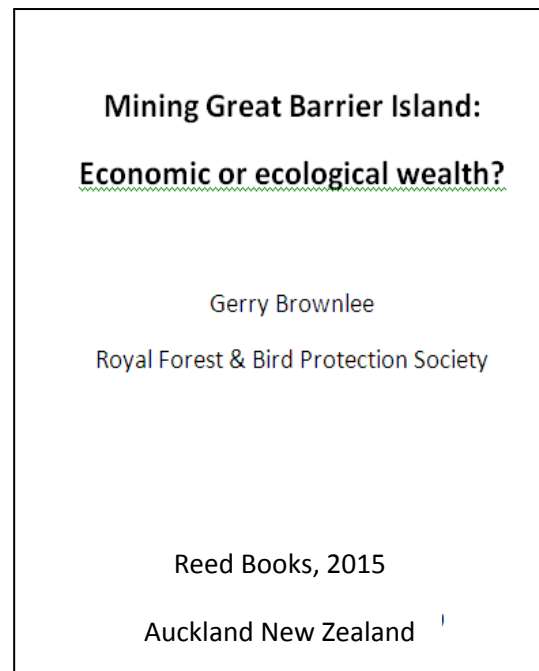5.   The new file is an empty EndNote library, showing "0 out of 0 references."
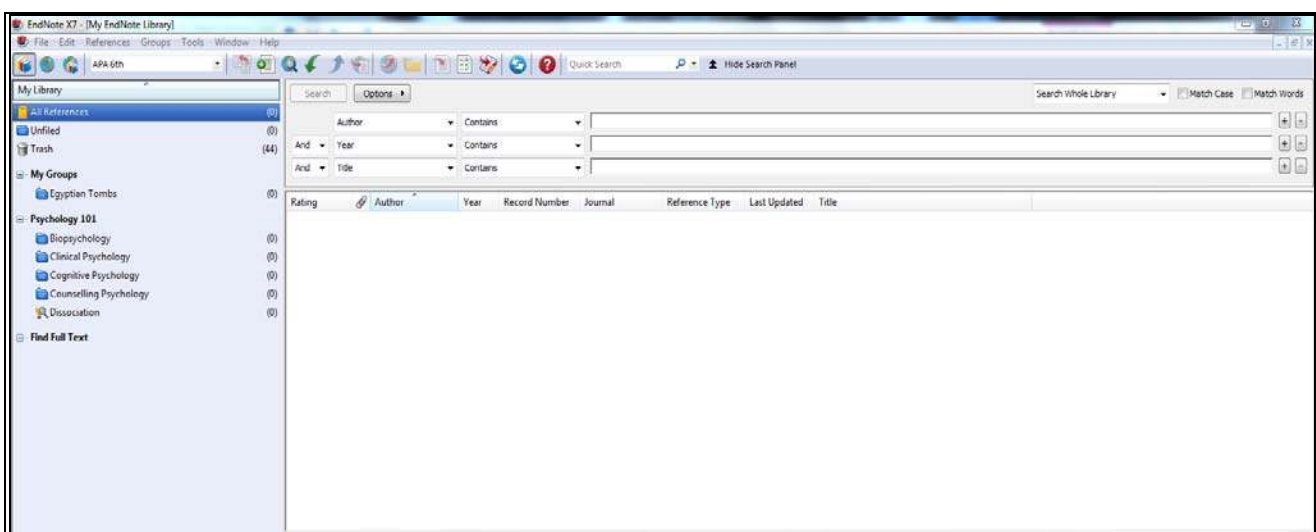
One Library

While it is possible to keep more than one library, it is recommended that you **only have one library**. If you insert references from different libraries into the same Word document there can be problems with formatting and reference double-ups. You can use the groups, notes and search features of EndNote to effectively manage a large library. Some fields in a reference can have about 10-12 pages of text, e.g. you can have 10 pages of your own research notes in addition to all the other information about the reference.

Manually Enter a Reference

To input reference information manually:

1. **References >> New Reference**
2. A blank **New Reference** appears.
3. Choose the Reference Type from the drop-down box
4. **Enter** the reference from this sample cover page:

Mining Great Barrier Island:

Economic or ecological wealth?

Gerry Brownlee

Royal Forest & Bird Protection Society

Reed Books, 2015

Auckland New Zealand

EndNote X7 - [New Reference]

File   Edit   References   Groups   Tools   Window   Help

Reference | Attached PDFs |

Plain Font | Plain Size | **B** *I* <u>U</u> P A¹ A₁ Σ Aa

Reference Type: Book

Rating

Author

Year

Title

Series Editor

Series Title

Place Published

Publisher

The **Reference Type** box is at the top of every new reference, indicating the type of reference being entered. Journal Article is usually the default reference type, but you can select any other type from the drop-down list.

Use the **Enter** key to create a new line in a field, e.g. for another author.
Use the **Tab** key to move down the fields.
Use the **Shift+Tab** keys to move back up the fields.

Once all data has been entered close the reference window (CTRL+W). EndNote will ask if you want to save the information, click yes. The new reference will now display in your library.

If you need to make changes to a reference after you have closed it, open the reference, make the changes, close the window and click yes in the pop-up box to save the changes.

Names

- There are several ways to enter author (or editor) names, either:

    First Middle Last   e.g. D H Erwin

                    OR

    Last, First Middle   e.g. Erwin, D H

- Only one author name can be entered per line. Press **Enter** to get another line.
- If you are entering initials instead of full names, make sure there is a space between each initial.
- If your author is a corporate body e.g. Manukau City Council you must put a comma after the last part of the author name e.g. **Manukau City Council,**   If you omit the comma then EndNote will interpret this as an individual author and output it as e.g. Council, M.C.
- As you enter author names you may notice that some appear in red. Any text that appears in red is part of a term list. These are used to help with data entry by suggesting terms as you type.
- For further information on entering names, including authors with suffixes and corporate authors that already include a comma in their name, consult Chapter 4 of the full EndNote manual: http://endnote.com/if/online-user-manual/x7

Formatting Text in a single EndNote Reference

The general rule is that you do <u>not</u> format your references with bold, italics, underlining or punctuation. EndNote does all of that formatting automatically. The reference style you select for your document governs the style of in-text citations and bibliography.

There are some occasions, eg; entering scientific names - Southern royal albatrosses (*Diomedea epomophora*), where you may need to format a piece of text. In these situations you can use the formatting options at the top of the reference window.

Accessing Records from the Catalogue

There are two ways to get results from the Library Catalogue into Endnote:

Option 1: Use the Online Search Method (searching within Endnote)

Currently the most reliable method of getting results from the Library Catalogue into EndNote is to use the Online Search method.

Before starting any Online Search make sure your library is displaying in the **Online Mode.** To select the Online Mode click on the picture of the globe at the top left of the library window.

Step 1: Search for References

1. **Tools >> Online Search**
2. Select **U Auckland** from the list of connection files and click **Choose.**