Introduction to EndNote (PC users)

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Revised 24.04.15

EndNote as a reference management tool

- An application that allows you to collect and organise all your refernces in one database.

- Is used with word processing software such as
  - Microsoft Word
  - Pages (plug-in at: http://support.apple.com/kb/HT6009
  - (OpenOffice, LibreOffice)

- Recommended browsers
  - For PC: Firefox or IE
    - Chrome will sometimes require an extra click or two during data import
  - For Mac: Firefox or Chrome
    - Safari and IE will sometimes require an extra click or two during data import

Course objectives

- Set up an EndNote library (database) and collect references.

- Import references from external databases.

- Search for and organise references in your EndNote library

- Insert citations into a word document using references from your EndNote library.

- Edit citations and references lists.

- Prepare the document for publication.

Installing EndNote on your own computer

- UiT has acquired a University-wide site licence for EndNote, making it available to all students and employees.
  - This includes private computers
  - There is also and EndNote app availbale for iPad (not free)

- For installation instructions:
  http:/uit.no/ub/endnote/programvare

- In the event of any technical problems during installation, contact Orakel (UiT IT support)
  www.uit.no/orakel
  orakel@uit.no

Creating an EndNote-database (*Library*)

- Open EndNote:
  - *Start* → Type «EndNote» in *Search programs and files* → Choose *EndNote Program*
  - Or any other way you prefer. ☺

- Make a new database:
  - *Create a New Library* at first time start up
    - OR
  - *File* → *New*

- Name your library:
  - *.enl*-file *(e.g.Torsteins.enl)*
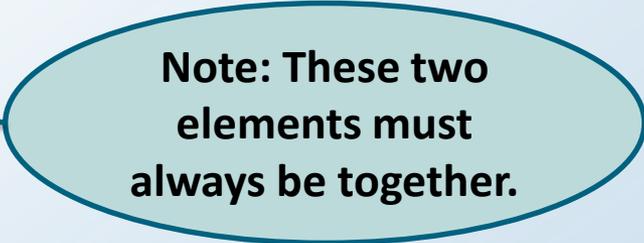 - A *.Data*-folder is created automatically. It has the same name as the *.enl*-file *(Torsteins.Data)*
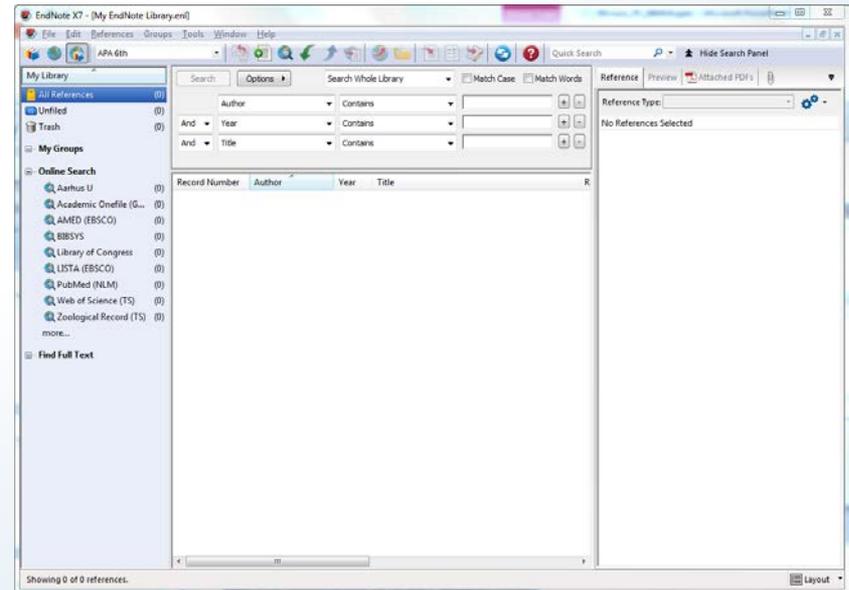
Good advice we REALLY think you should heed

- Avoid confusion and stay organised by sticking to one single EndNote library.

- Make sure you know where your library is saved. Take frequent backups (*File* → *Compressed Library (.enlx)* → *Save* (to external device).

  - .enl
  - .Data

Note: These two elements must always be together.

Sync to EndNote Web from all your computers

- If you want to work with your EN-library from different computers, **you should keep the libraries in sync using EndNote Web**.

- To register for an EndNote Web account:
  - Click the blue *Sync-button* in the library window
  - Choose «Register»
- Settings for sync can always be changed from the preferences menu: *Edit → Preferences → Sync*
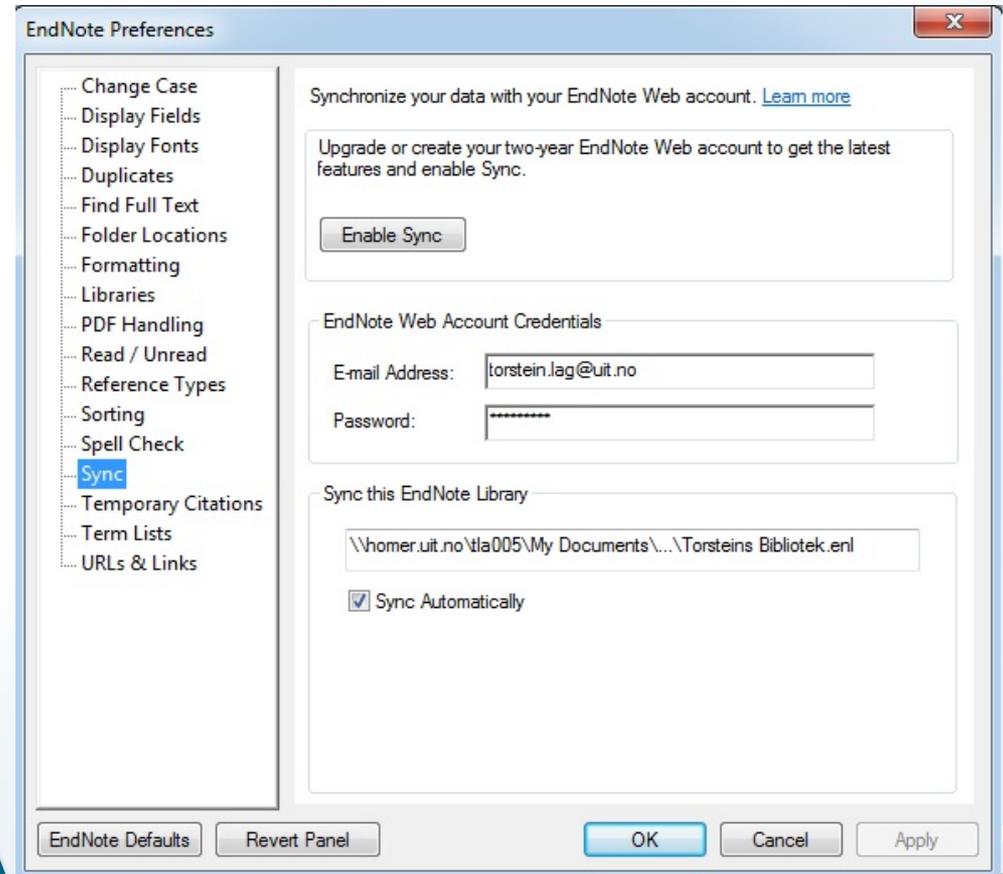
Choosing a reference style

- Disciplines and journals have different requirements for citation and reference styles.

  - **(For a bachelor or master thesis: ask your supervisor!)**.

- EndNote contains thousands of different predefined styles (*Output Styles*).
  - The active style is displayed in the style drop-down, where you can also change which style is active.
  - The *Preview* tab will show you how a highlighted reference will appear in a reference list in the currently active style.
  - If the style you are looking for is not on the short pull down menu, choose *Select Another Style*, and browse the list or search using *Find by → your discipline*

Registering references manually

- Go to *References* → *New Reference*

- Coose *Reference type,* e.g.*:*
  - Book
  - Journal Article
  - Book Section

- Different data is entered depending on the chosen reference type.

<u>Book</u>
SANDEL, M. 2012. *What Money Can't Buy: The Moral Limits of Markets*, **London, Allen Lane.**

<u>Journal article</u>
STEMSHAUG, O. 2008. Bilnamn nordafjells. ***Namn og nemne,* 25, 93-117.**

<u>Book section</u>
BARTON, M. E. & TOMASELLO, M. 1994. The rest of the family: the role of fathers and siblings in early language development. ***In:* GALLAWAY, C. & RICHARDS, B. J. (eds.) *Input and interaction in language acquisition.* Cambridge: Cambridge University Press.**

(Style: Harvard)

Fields in EndNote, and what needs to be registered: - Book chapter example

Author: Carlomagno, Sergio ; Iavarone, Alessandro (ONLY ONE NAME PER LINE!)

Year: 1995

Title: Writing rehabilitation in aphasic patients

Editor: Code, Chris ; Müller, Dave (ONLY ONE NAME PER LINE!)

Book Title: Treatment of aphasia

Place Published: London

Publisher: Whurr

Pages: 201-222

Optional fields that may help retrieving the source:

ISBN: 1870332334

Call Number: 616.855 Tre

Label: EndNote-intro

Keywords: Aphasia, Rehabilitation, Writing (ONLY ONE KEYWORD PER LINE!)

Saving a reference

- There is no dedicated 'Save' button in EndNote. Three ways to save:
  - *File → Save*
  - Ctrl + s
  - Close the reference window (you will be asked about saving)

- When you register several references it is important not to write in the same editing window (to avoid overwriting what you have already registered).
  - When you have finished the registration of a reference and saved it, close the reference's editing window (ctrl + w).
  - To register a new reference, open a new (and empty) editing window (ctrl + n).

Exercise 1
Registering references manually

- Enter a reference of the type *Book* into your EndNote library. The fields highlighted in red in the example below must be filled in.
- Note: Instead of the example given here, you can enter a book reference relevant for your own studies/research.

Reference type: Book

Author: Wolfe, Michael

Year: 1993

Title: The Conversion of Henry IV

Place Published: Cambridge, MA

Publisher: Harvard University Press

Call Number: UBT/KS, 944.031 Wol

Key Words: 16th century, Henry IV, France

(NB! Only one key word per line, no comma needed)

Exercise 1b:
Registering references manually

- Create a record in your EndNote-library using the data below.
- Feel free to enter a different article if you like

Reference type: Journal Article

Author: Sabir, Munawar

Year: 2011

Title: Political puzzles and prospect of media in Pakistan

Journal: Journal of Political Studies

Volume: 18

Issue: 1

Pages: 109-123

Label: EndNote-intro

Exercise 2a:

Importing references from an external database and into your EndNote library

You can import references from our Library Search and most other databases and discovery systems (see 'Databaser' at uit.no/ub). The exact procedure will vary from database to database.

- **From Oria (our library discovery system) (uit.no/ub)**

Greenhalgh, T. (2014). *How to read a paper: The basics of evidence-based medicine, 5th ed.* Chichester: Wiley-Blackwell/BMJ Books (Style: APA 6th)

- – Find the right edition of Greenhalgh's book. Choose the paper version.
- – Click the details tab/link.
- – Click *Send til Endnote → OK → Open.*
- – Your reference should now be in your EndNote library.
- – Review by double clicking the reference and make sure the data is entered correctly in the required fields.

Exercise 2b:
Importing references from an external database/journal into EndNote

- **From a journal**

Reid, Richard. "Past and Presentism: The 'Precolonial' and the Foreshortening of African History." *The Journal of African History* 52, no. 02 (2011): 135-55.

(Style: Chicago 16th)

- – Search for the article using Library Search.
- – Click the View Online-tab/link
- – Click the 'Full text via'-link
- – From the article record at Campbridge UP, choose *Export Citation*.
- – Choose options as appropriate.

- If you are asked whether you like to open or save, **choose Open**.
- Highlight the reference in EndNote, right click it, and choose *Find Full Text* from the context menu.
  - – EndNote will now attempt to find a pdf of the article and attach it to your reference.
- The pdf is now a part of your library.
- (If you downloaded the pdf using a different method, you can attach it to your library by right clicking the reference, choose File Attachments, then Attach File, and browse to the pdf's location in your folders.)

Attaching the pdf full text

- EndNote may be able to retreive a pdf for a reference, and attach it to your library. **Note: For this to work the reference must already be saved in your EndNote library**
- You can increase the probability of success by doing the following:
  - On the Edit menu, choose Preferences, then Find Full Text in the left hand panel.
  - Tick the box next to 'Open URL' and put the following url into the text field after 'Open URL Path': http://sfxeu09.hosted.exlibrisgroup.com/sfx_ubto
  - Click OK.
  - Note: If you are not on a campus computer, you should use the AnyConnect VPN-software
- How to find full-text: In the library, highlight the reference and click the Find Full Text icon:

How to search for references by topic and export several simultaneously to EndNote (SCOPUS example)

1. Go to uit.no/ub, click the Databaser-link immediately below the search box, and locate the database *Scopus.*
2. Open Scopus and search for anything you like.
3. Apply limiters etc. as appropriate until you are happy with your selection.
4. Tick boxes for each of the references you want. Click *Export*.
   1. Under *Export format*, choose *RIS format (Reference Manager, ProCite, EndNote)*
   2. Under *Output*, choose *Abstract format*
   3. Click *Export*

Organising, sorting, and searching for references in your own library I

- You can sort references in your library window by clicking the various column headings (*Author, Year, Title, etc.*).

- *Group*: You can create and define your own groups of refernces.

  - *Group → Create Group →* Name your group (e.g. «Thesis» → Click *Enter*.

  - Higlight references in your list and drag them across to your group. Alternatively, right click the highlighted references, → *Add References To →* Choose your group.

  - Remove a reference from your group: Highlight it, click *Groups →* *Remove References from Group.*

Entering citations/references in Word (Cite While You Write)

> Remember:
> Use the EndNote
> tab in Word.

- ***Insert Citations* (on the EndNote tab in Word)*:***

  - ***Find Citation(s):*** Allows you to search your EndNote library while still in Word. Type a search term (e.g. «chocolate» or «Sandel». Pick a reference, and click Insert.

  - ***Insert Selected Citation(s):*** Will insert one or several references that you have already highlighted in EndNote.

- ***Style:*** You can change the active style in the drop down menu.

- In your EndNote display, you should see a temporary «group» containing the references you have cited in your active word document.

Editing citations and reference list

- ***Edit Library Reference(s):*** Allows you to edit the reference in EndNote.
- ***Update Citations and Bibliography:*** Updates citations and references in your Word document with changes made to your EndNote library.
- ***Edit and Manage Citation(s):*** Editing in-text citations. (IMPORTANT: Any edits to citations and reference lists must be made vi the EndNote menu in Word exclusively. Attempts to edit «manually» will fail, and may cause problems.)
  - **Useful short cut: Right-click the citation and go to Edit Citations in the context menu.**
  - ***Display as: Author (Year)*** Moves name outside parantheses.
  - ***Exclude Author*:** Removes Author name entirely.
  - ***Prefix*:** Useful for inserting such things as «see …» or «e.g. ...», etc.
  - ***Suffix:*** Useful for inserting page numbers.

Exercise 3
Inserting and editing citations in Word

Before you start: Make sure you have a handful of references in your library

1. Open the file *Cognitive conceptions of learning.docx* (Mailed to you earlier. If not, you could copy it from slide 30 in this presentation).

2. I Word, choose a style (APA 6th if you have no preference.)
   - If your style is not on the drop down menu, activate it in EndNote by *Select another style → [Style] → Choose.*

3. In Word, insert citations in stead of the numbres in the text.
   i.   Insert a random reference in place of A.
   ii. Insert several to replace B.
   iii. Insert one reference to replace the C, and use the same one to replace D.
   iv. Insert several references to replace E and F.

4. Insert page numbers on the citations you created at A and D.

- **To delete a reference:**
  - *Edit&Manage Citation → Edit reference → Remove citation*

5. Delete one reference from B and one from E.

Continued on the next slide!

Exercise 3 (ctnd.)
Inserting and editing citations and references in Word

6. Hide the author name on citation A.

7. Move the author name at C outside of the paranthesis.

8. Insert "but see" in the citation at E (use the *Prefix* field, and remember space).

9. In EndNote: Change the publication year of one of the references in F. Update the citations and bibliography in Word

10. Change the Output Style (on the EndNote tab in Word) to a different style.

11. Change the layout of the reference list (*Bibliography* → *Layout*).
   – Use a different line spacing
   – Choose a different font.

If you finish this exercise early: Find your favourite database and try importing some references relevant to your work.

In case you need some help

- Start by searching the EndNote Help-menu, the faqs and knowledge base on EndNote.com, and by Google'ing your problem.
  - http://endnote.com/support/faqs

- Take a look at our EndNote info: uit.no/ub/endnote
- Drop an e-mail to us at endnote@support.uit.no

- Meet us at the library reference desk:
  - Trine Sandmo (Alta)   Tuesdays/Thursdays 08:00-11:30
  - Helene N. Andreassen (KS)   Thursdays 12:00-14:00
  - Grete Overvåg (NH)   Thursdays 14:00-17:00
  - Sissel H. Hansen (NH)   Tuesdays 08:00-10:00
  - Torstein Låg (PJ)   Tuesdays 14:00-16.30

Homework (Yes! Homework!)

- If you come to us for help, we expect you to be up to speed on what we have gone thorugh today (see slide 3).

- From experience, we know that you will quickly forget unless you start using EndNote actively soon after the intro course.

- So: Practice a bit during the coming week!

Extras:
Converting a Word-document to plain text

- Some journals may have very particular requirements for citations and references, which may make it hard to find an exactly matching EndNote style. One solution is to perform some minor manual edits.

- It is often also a good idea to convert a document to plain text before you submit it as a manuscript (at least for the final submission of an accepted mauscript).

- *Convert Citations and Bibliography → Convert to Plain Text.*
  - A copy of your document is created where the EndNote codes are removed.
  - This copy is available for editing and saving.
  - The original document is preserved, including the EndNote field codes.

Extras:
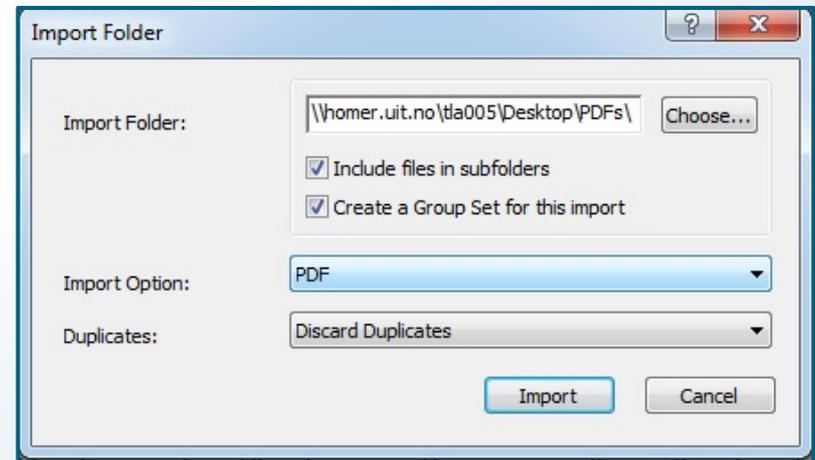# Finding and editing a style in the *Style Manager*

- To find the style you are looking for:
  - *Edit → Output Styles → Open Style Manager*
  - *Style Info/Preview*: Displays references in the various styles

- Other styles can be downloaded from endnote.com, journal web pages, etc.
    Go via   *Open Style Manager → Get More on the Web*
    or   http://endnote.com/downloads/styles

- In the Style Manager, you can make a copy of an existing style and modify it to suit your needs.
  - *Edit → Output Styles → Open Style Manager*, markere stilen → *Edit.*
  - After editing, save your new styre: *File → Save As → Style name: [Style] copy*

- Some examples of what you can edit are i) the formatting of in-text citations; ii) the formatting of references in the reference list (Bibliography); iii) the formatting of citations in footnotes.

Extras:
Importing PDFs that are already on you computer

A couple of ways to do this:

- Just grab the pdf(s) from wherever it is saved and drag it over the EndNote window. The mouse pointer should get a little «+». Drop the pdf.

- Choose *File → Import → File* or *Folder.*
  - You can import whole folders, including sub-folders.
  - EndNote can cerate group sets that roughly correspond to the folder hierarchy

- You can adjust the setting for pdf-handling in the Preferences dialogue: *Edit → Preferences → PDF Handling*

Import Folder

Import Folder:	\\homer.uit.no\tla005\Desktop\PDFs\	Choose...

☑ Include files in subfolders
☑ Create a Group Set for this import

Import Option:	PDF
Duplicates:	Discard Duplicates

[Import] [Cancel]

Extras:
Organising references using Smart Groups

- *Smart Group*: Groups that will automatically update when new references are added to the library.
  - You can use the various fields (e.g. author,title, keywords etc.) to specify what references are included in your smart group.
    - Author example:
      - Smart Group *Sandel*: «Author contains *Sandel*»
        - » If a new reference with Sandel in the author field is added to the library, it will automatically be added the Smart Group *Sandel*.
    - Topic example: (title, keyword)
      - Smart Group C*hocolate*: «Any field contains *sjokolade*» OR «Any field contains *chocolate*»
      - If a new reference with *sjokolade* or *chocolate* in the title or as keyword is added to the library, it will automatically be added to the Smart Group *Chocolate*.

- *Quick Search* and *Search*: simple and complex seaches in your library.

Extras:
Importing references from Google Scholar

- In Google Scholar

  – Choose *Settings*
  – Find the options for *Bibliography manager.*
  – Click *Show links ot import citations into,* and choose EndNote
  – Click *Save*

[PDF] Psychiatric consultation in a Vietnamese **refugee camp**   [PDF] fra psychiatryonline.org
C RICHARD, H RAHE - Am J Psychiatry, 1978 - Am Psychiatric Assoc
The authors provided psychiatric consultation to medicalpersonnel in charge ofa
Vietnamese **refugee camp** in California. Although the emergency measures that supplied
clothing, food, shelter, and medical care to nearly 60,000 **refugees** were immensely **...**
Sitert av 91   Beslektede artikler   Alle 7 versjoner   Web of Science: 49   Importer til EndNote   Lagre   Mer

Extra:
How to enter official documents?

- There are no simple rules for how to cite and register official documents.
  - Different disciplines have their own ways of doing things, and the reference styles might have their own rules.

- Example: **Government documents**
  - Select *Reference Type Book* or *Government Document*
  - When the author is not a person: Insert a comma after the text in the *Author* field

Author
St.meld. nr. 41,

- Example: **Acts**
  - Select *Reference Type Legal Document*
  - The short version is registered in the *Author* field, followed by a comma. The entire title of the act is registered in the *Title* field.

Extra: Combining two (ore more) Word-documents (each with their own reference list) into one document with just one reference list.

- In each of the two documents (A og B):
  - Click *Convert Citations and Bibliography → Convert to Unformatted Citations.*
  - Your in-text citations should now look like this {#EndNote-number}, and your reference list should be gone.

- Copy the text from one Word-document B into the other document A (alternativeley *Insert → Object → Text from file),* and click *Update Citations and Bibliography.*
  - References in your text should now look ok, and the reference lists should be combined into one.

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Thank you for filling in our evaluation form!

Good luck using EndNote!

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