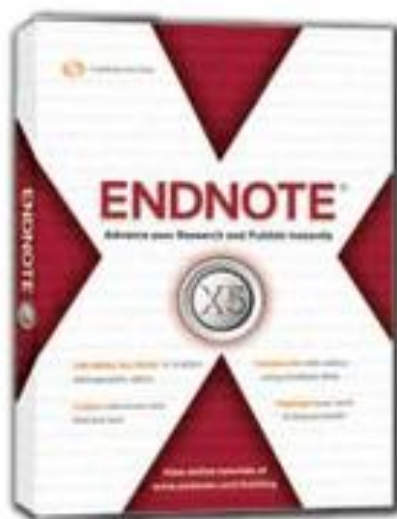


# Referencing & Citing with EndNote

## Introduction to EndNote X5 Practical exercises



**Information Services  
October 2011**

## Introducing EndNote

- EndNote is a **reference database**--it specialises in storing, managing, and searching for bibliographic references in your private reference library.
- EndNote is a **bibliography maker**--it builds lists of cited works automatically. Use EndNote to insert citations into word processing documents to compile a bibliography in any format you need.
- EndNote is an **online search import tool**--it provides a simple way to capture references from online bibliographic databases, library catalogues etc. and import them directly into EndNote.

EndNote is available for both PCs and Macs.

### Use of EndNote on campus

The University of Nottingham has a site licence for EndNote which allows staff and students of the University free use of the software under the terms of the licence. The software can only be used on campus or on University owned laptops.

Please ask your School IT contact if you would like to have the software installed on a university owned computer in your department.

### Use of EndNote off campus

#### Client version

For off-campus use or use on your own laptop, a personal licence is required and this is available from the suppliers, Adept Scientific. Owing to the University's site licence, you will be eligible for a reduced cost of the software for personal use, which at the time of writing is £55 plus VAT and delivery.

To take advantage of your University discount, go to:

<http://edustore.adeptscience.co.uk/>

- Select **University of Nottingham** from the list of institutions
- **Login** with your University of Nottingham username and password

#### Web version

Another alternative for home use is to use EndNoteWeb (<http://www.myEndNoteWeb.com>) which is fully functional, but does not have the same capacity for customisation as EndNote desktop. However, both systems can be used and references can be transferred from one system to the other

See more information about the differences between the desktop and web versions at:

[http://thomsonreuters.com/products\\_services/science/science\\_products/a-z/EndNote\\_web](http://thomsonreuters.com/products_services/science/science_products/a-z/EndNote_web)

More information about EndNote and a free demonstration version can be obtained from the EndNote site at: <http://www.EndNote.com>

### Versions

The University currently supports the latest version - X5 (i.e. 15).

# Section 1: Opening EndNote and Creating a Library

## Start EndNote and Create a Library

Note: In EndNote, databases of references are called libraries.

From a PC in a University of Nottingham computer room:

- Click on the **start** button
- Click on **all programs**
- Click on **EndNote**
- Click on **EndNote Program.**

A window will open asking if you wish to create or upgrade a new free EndNoteWeb account. This will allow you to use the web version of EndNote as well as the client version.

### If you do not currently have an EndNote Web account

If you have not yet registered for an EndNote Web account you can do so at this stage.

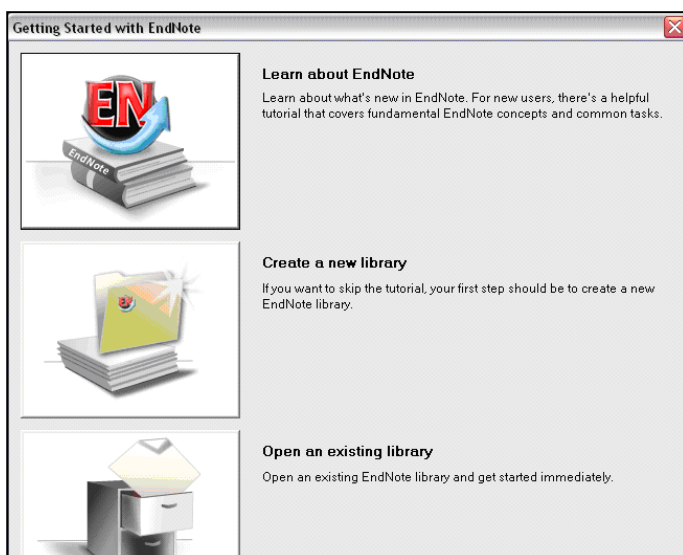
Or, you can continue to open EndNote without creating an EndNote Web account (you will be able to register for the web version at a later time):

- Click **do not integrate with EndNoteWeb at this time**
- Click on **finish.**

### If you have registered for an EndNote Web account previously

You may be asked if you want to upgrade your account to take advantage of new features. If you do not wish to do this at this stage, click **cancel.**

The first time you open EndNote, you will be offered 3 choices



### Tip: Setting a default library

You can choose whether you wish EndNote to open with a specific library or to allow you to choose a library by setting a default.

From the *Edit* menu:

- Click on *Preferences*
- Choose your favoured option beside '*When EndNote starts...*'

- Double-click the icon to **create a new library.**
- You will be asked to save the library to a suitable location, for example to your personal file store on the Z drive or to a memory stick.

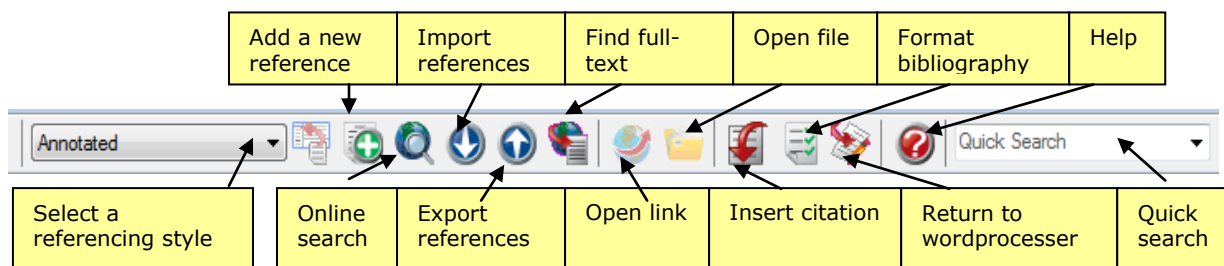
The next time you open EndNote, the library you have created will automatically open.

**Tip: Creating one EndNote library**

It is recommended that you only create one library in EndNote. You can use groups to organise references together (see section 4)

## Understanding the Toolbar

The icons along the top of the toolbar allow you to perform basic functions. You can also access these functions from the drop-down menus at the top of the screen.



All these functions can also be accessed from the menu bar at the top of the page.

## Section 2: Adding References

Start adding references to your new library. There are two ways of doing this:

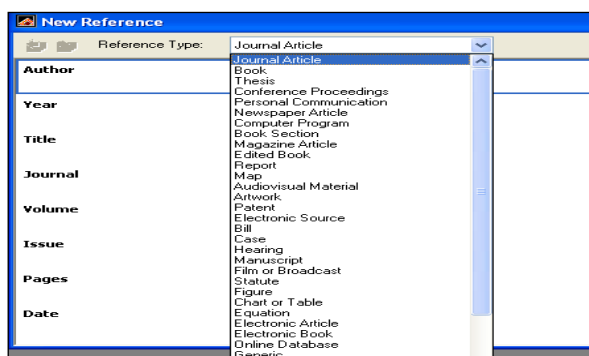
- Type in references manually
- Import references automatically from an online database

### Create a New Reference Manually

- Open a library
- Choose **new reference** from the **references** menu or click on the  symbol

An empty window opens with the words **new reference** displayed at the top.

New references always appear as journal articles but can be changed to any other type using the **reference type** drop down menu at the top of the window.



- Enter the information in the relevant fields: author, title date etc.
- Move between fields by pressing the **tab** key
- Except for authors, no extra punctuation needs to be entered into the reference; EndNote adds the necessary punctuation to the references when it creates a bibliography.

**Tip: Entering author names**

Enter author names as follows:

Surname, initials or full name (remember to put a comma after the surname and separate initials with full-stops),  
E.g. **Smith, J. E.**

If you have more than one author, make sure that each author is entered on a separate line.

If you have a corporate author or body, enter a comma after the name to ensure that it displays correctly, e.g. **Department of Health,**

When you close the reference window, you will be prompted to save the information and it is then automatically saved as a new reference in your library.

**Tip: Knowing when a reference was added**

To see when a reference was added or updated view the **last updated** column or open the reference by double-clicking on it to see the footer.

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## Section 3: Importing references from databases

You can use EndNote to save references from bibliographic databases or library catalogues by importing them electronically into your EndNote library. Different databases will use different methods.

There are two methods:

- Direct import facility
- Saving a file of references which are then imported using an appropriate filter.

For EndNote to understand the reference, the information must be in a tagged format.

- If your database has a direct import facility, these tags will automatically be provided.
- If your database requires you to firstly save the references as a file, you will need to save as a text file which will automatically provide the relevant tags.

Word documents do not have these tags and therefore you cannot transfer references directly from Word to EndNote. Try finding the references again using a database and importing them directly from there.

**Note:** We do not recommend using the online search option to search bibliographic databases from within EndNote. This is because you would lose the functionality of the database searching system and your search is likely to be less effective.

### 3a: Direct Export




#### Importing references from Web of Science

The Web of Science is a multidisciplinary database covering journals and conferences relevant to the sciences, arts, and social sciences and is one of the databases with a direct import facility. It is used to demonstrate the direct import methods to copy references from the database straight into EndNote.

#### Accessing the Web of Science

- Access the Web of Science from the **eLibrary Gateway** (<http://www.nottingham.ac.uk/elibrarygateway>) or launch from the **library** tab in the portal.
- In the eLibrary Gateway click on the **titles** tab and type in **web of science**.
- Click on the **link** for the Web of Science to connect to the database.

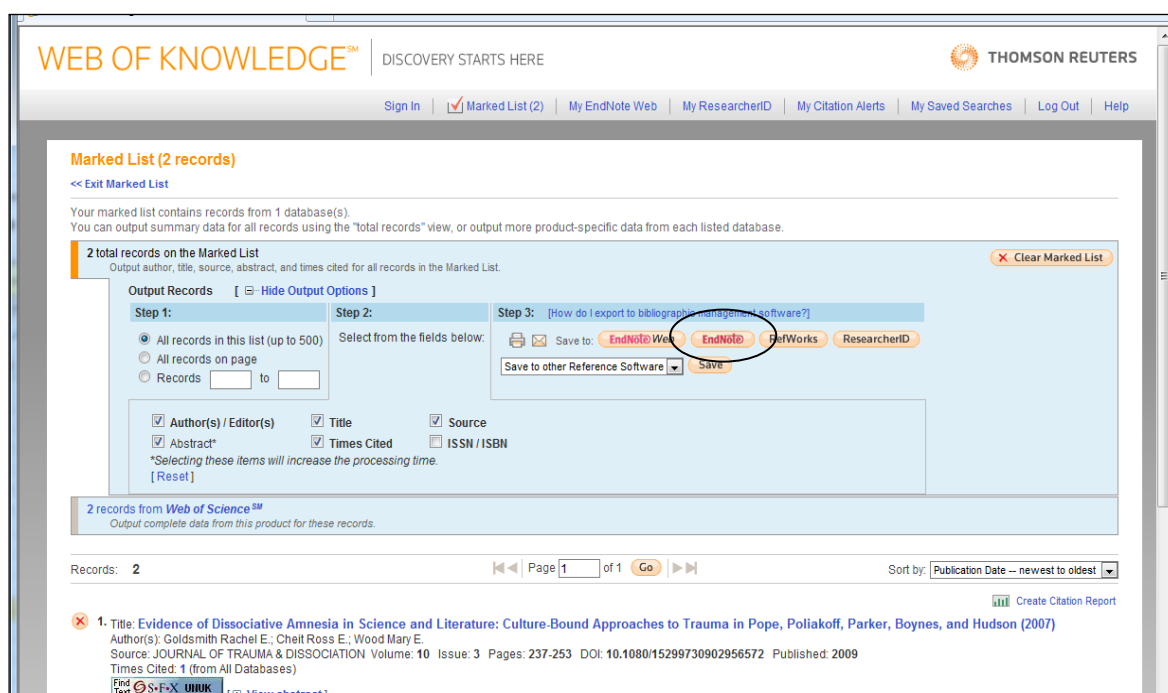
#### Importing references to EndNote

- Conduct a search and mark some relevant references by ticking the **check boxes**
- Click on   to add to your **marked list**
- Click on the **marked list** button at the top of the screen to view the selected references.
- Select any extra details e.g. abstract, times cited as required
- Click on the **Save to:**  button

#### Tip: Further help

For more information on searching databases, see Pathway at:

<http://webct.nottingham.ac.uk>



The screenshot shows the 'Marked List (2 records)' page in the Web of Knowledge interface. The 'Save to:' dropdown menu is open, and the 'EndNote' option is selected and circled in red. The 'Save' button is also highlighted. The page displays the following information:

- 2 total records on the Marked List
- Output Records [ Hide Output Options ]
- Step 1: All records in this list (up to 500)
- Step 2: Select from the fields below: Author(s) / Editor(s), Title, Source, Abstract, Times Cited, ISSN / ISBN
- Step 3: [How do I export to bibliographic management software?] Save to: EndNote Web, EndNote, RefWorks, ResearcherID
- 2 records from Web of Science
- Records: 2 Page 1 of 1
- Sort by: Publication Date -- newest to oldest
- 1. Title: Evidence of Dissociative Amnesia in Science and Literature: Culture-Bound Approaches to Trauma in Pope, Poliakoff, Parker, Boynes, and Hudson (2007)

If your export does not begin automatically, click on the **export** button.

The references will automatically download into the EndNote library that you currently have open. If you don't already have EndNote open, you will be asked to select the library into which you wish to import your references.

When the import is complete, only newly imported references will show in the Library window. They are put into a group called **imported references** where they can be checked. The original references plus the new ones can be viewed under **all references**.

Remember to return to Web of Science to log out when you have finished.

#### **Tip: Diacritics**

Diacritics will often not import correctly from databases. Go to <http://www.nottingham.ac.uk/is/uon/knowledgebase/EndNote.php#28> to see how you can edit a reference using diacritics.

## **3b: Non-direct export**

### **Importing from the Library Online Catalogue**

Some databases do not have a direct export option. The Library Online Catalogue (UNLOC) is an example.

This method involves two steps:

- 1) Saving references as a text file
- 2) Importing the file into EndNote using a filter.

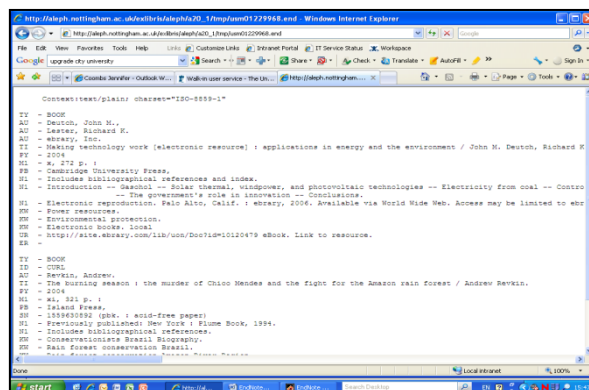
Access UNLOC at: <http://www.nottingham.ac.uk/unloc> or click on the **UNLOC** link from the **library** tab in the **portal**.

#### **Step1: Saving references as a text file**

- Perform a search and **mark** some relevant references
- Click on the **save/mail selected** option towards the top of the screen.

We are going to **save a set of records to disk**.


- From the drop-down menu, **select reference management format**. This will format the references to enable EndNote to import the appropriate details.
- Click on the **save** button.

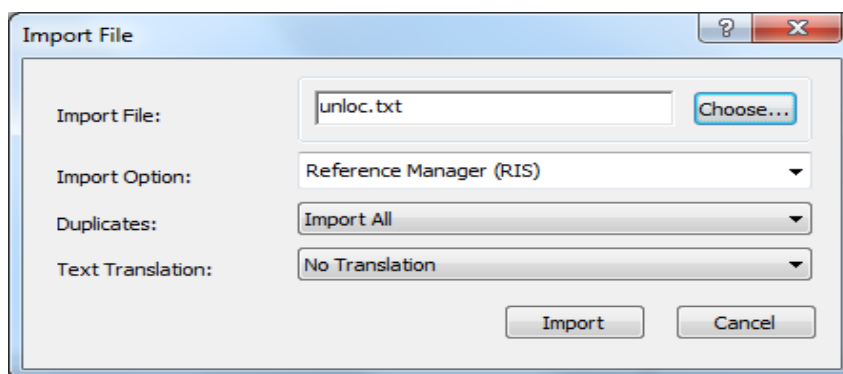


Your references are now displayed in a tagged format for EndNote.

- Click on the **file** menu
- Click on **save as**
- Choose a location to save your file to, e.g. your Z drive
- Give your file a **filename**
- From the **save as type** drop-down menu, select **text file (\*.txt)**
- Click on **save**.

## Step 2: Importing the Saved References into EndNote

1. In EndNote open the library into which you want to import the references.
2. From the **file** menu, choose **import > file** or click on the  icon and the following window will appear:



3. Click:
  - **choose file...** to locate and open the text file of references you have just saved
  - Select the file and click **open**
4. EndNote now needs to know which format the references from the database are in:
  - Click on the drop-down menu beside the **import** option
  - Choose **reference manager (RIS)**. This is the correct format for references from UNLOC.
5. Now select an option from the **duplicates** drop down list. (A reference is considered a duplicate if the author, year, title, and reference type match a reference already in the library.) The options are:
  - Import all
  - Discard duplicates
  - Import into duplicates library
6. Click **import** to import the file.

When the import is complete, only newly imported references are showing in the Library window. They are put into a group called **imported references** where they can be checked. The original references plus the new ones can be viewed under **all references**.

**Double-click** on a reference to see if it has imported correctly. Please note that sometimes these import options are not 100% effective and therefore some information may be missing. Sometimes this information may have been put into the

**notes** field, which allows you then to simply copy and paste it into the correct field in the reference.

### 3c: Importing from some other commonly-used databases

As well as UNLOC, a few other databases do not have a direct export option. You should follow similar steps to the previous ones to save as a file and import.

When importing into EndNote you will need to choose the appropriate **filter**. A filter is usually the name of the database and the supplier.

Note that some databases are offered by more than one supplier and so you will need to select the appropriate **supplier**.

If you can't see the filter you want, click on the option **other filters**.

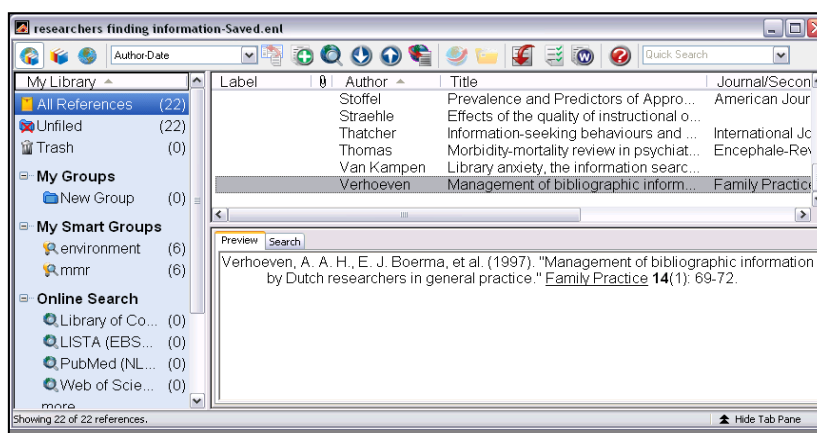
See the **Appendix** for details on how to download from some of the commonly used databases. If your database of choice is not listed, please ask your subject librarian.

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## Section 4: Managing references

### Displaying references

When you open an EndNote Library you see the Library window listing all of the references it contains:



For each reference, the Library window displays the first author's last name, the year, and as much of the title as will fit in the window. (The default display can be altered in the Display Fields menu under **edit – preferences and display fields**).

If you highlight a particular reference and select the **preview tab**, more detail is shown in the lower half of the window in the chosen referencing style.

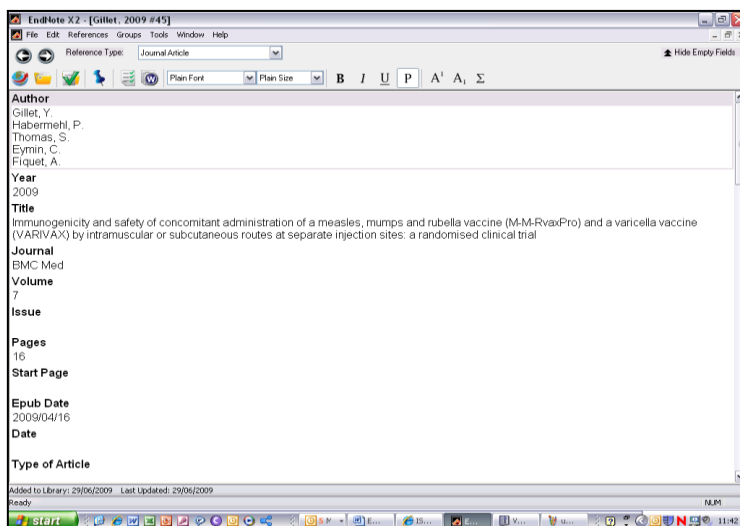
You can browse through your reference library by using the scroll bar, the scroll arrows, or the page down, page up, home, end, and arrow keys.

## Select & Open a Reference

To work with specific references you must first select them in the Library window by either/or:

- **Double-clicking** on a selected reference in the list to allow you to edit the reference
- Selecting the tab **PDF & quick edit** tab in the lower window to see an editable version of the highlighted reference.

If you double-click on a reference, a window opens to display all of the information associated with the reference.



To view the rest of the reference, use the mouse to scroll down through the reference window. Note that you can **hide empty fields** with the button at the top right of the window.

EndNote will prompt you to save any changes made to a reference when the reference window is closed.

## Search for a Set of References

- Click on the **tools** menu and select **search library** to open up the search box in the bottom pane

Or

- Click the **search** tab next to **preview** in the bottom pane.
  - Type in your **search term** in the first box and select the **field** in which you wish to search
  - Click on the **search** button

You can combine searches together using the Boolean operators **AND/OR**

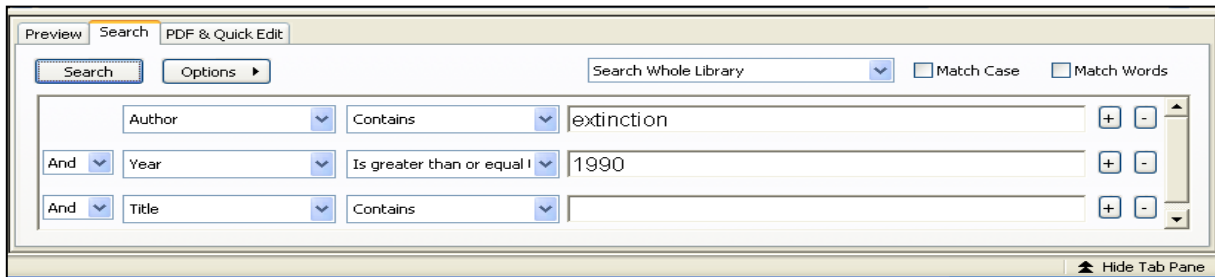
To find references for a particular year range:

- Type in the **start date** in a search box
- Choose **year** from the drop down field list
- Select the appropriate option in the **contains** drop-down menu.

For example, to search for references from 2000 onwards:

- Choose the **year** field
- Select **is greater than or equal to** from the **contains** drop-down menu
- Enter **2000** in the search box

The search example below is for references containing the word extinction, published since 1990:



In order to combine more than three searches, extra lines can be added by using the + button.

You can also choose to search by **added to library** or **last updated** and enter a date.

You can either search the **whole library** or only the **references that are showing**.

To return to the preview view, click on the **preview** tab in the bottom pane.

To carry out a quick search, use the **quick search** box at the top of the page and type in your search term.



## Sorting References

By default, the library window is sorted alphabetically by first author. You can change the order of the displayed fields by clicking on the column headings.

To sort references by other fields:

- Click on the **tools** menu
- Choose **sort library**
- Use the **drop-down menus** to choose the required **field(s)**
- Click on the button to the right of the field to specify **ascending** or **descending** order
- Click on **OK**.

## Linking to the Full-text

EndNote provides several ways of linking to the full-text of an article.

### Automatic linking

For databases such as Web of Science or PubMed, an html link to the record will automatically be populated into the **URL** field. If the University subscribes to the full-text of the article, you can click on the link and browse to the full-text.

Alternatively, highlight a reference in your library:

- Click on **references** from the top menu
- Click on the **URL** option
- Click on **openURL**.

Please note that not all journals in these databases will be subscribed to by the University.

### Typing in the URL

You could also simply type in the web address for the full-text of an article in the URL field of the reference. For journals it is recommended that you use the **DOI (Digital Object Identifier)** code to create the URL adding <http://dx.doi.org> before the DOI number, e.g. [http://dx.doi.org/10.1016/S0040-4039\(97\)82966-8](http://dx.doi.org/10.1016/S0040-4039(97)82966-8)

DOI numbers are often shown on the website or PDF of journal articles and usually import into the DOI field in EndNote from a database.

### Attaching files manually

To attach a PDF file:

- **Right click** the reference in the list view
- Select **file attachments**
- Select **attach file**
- **Browse** for the document.

### Automatically finding the full-text

If the University subscribes to the full-text of an article, you can ask EndNote to find it and automatically attach it to your reference.

To do this you must enter details of the **OpenURL resolver** used by the University in the **preferences** area:

- Click on **edit**
- Click on **preferences**
- Click on **find full-text**
- In the OpenURL path enter: [http://sfx.nottingham.ac.uk:80/sfx\\_local](http://sfx.nottingham.ac.uk:80/sfx_local)
- Click on **OK**.

To automatically attach PDFs:

- **Highlight** the reference(s)
- Click on the **references** option in the top menu
- Choose **find full-text** (twice).

You will need to accept the copyright statement. EndNote will then search for the full-text (this can take several minutes).

The results of the search will be shown in the menu pane on the left-hand side under the heading **find full-text**.

If found, a **paperclip icon** will display next to the reference.

## Watch out: Not 100% fullproof

This method uses a variety of ways to locate the full-text from our subscriptions but it is by no means full-proof. There are many reasons why the full-text may not be found even when we do have a subscription, for example, many publishers will automatically block bulk downloading of PDFs. In these cases, you could attach the file manually.

To check whether we do subscribe to the full-text, click on the **references** option from the top menu bar and click on the **URL option** and then **openURL link**. This will take you to the SFX window and clarify whether the full-text is available or not.

## Viewing PDFs

There are 3 ways that you can view a PDF

1. **Right-click** on the **paperclip icon**
  - Click on **file attachments**
  - Click on **open file**.
2. **Double-click** on the reference
  - Scroll down to the **file attachments** field
  - **Double-click** on the **PDF icon** to open.
3. **Single-click** on a reference
  - Click on the tab called **PDF and quick edit**

You will see the PDF shown in the lower half of the window allowing you to:

- **Resize** the window
- Use the **zoom** option to enlarge/decrease the text size
- Use the **highlighter icon** to highlight areas of the text
- Add **sticky notes** to add your own comments
- Use the **find** option to search for terms within the PDF.

The right-hand pane provides you with all the details of the reference which you can edit at this stage if required.

The screenshot shows a PDF viewer window titled "PDF & Quick Edit - atmospheric environment.pdf". The toolbar includes icons for file operations, zoom (100%), and editing tools like a highlighter and sticky notes. The main content area displays the title "Wet deposition of major ions in a rural area impacted by biomass burning emission" and the authors: Cidelmara H. Coelho<sup>a</sup>, Andrew G. Allen<sup>b</sup>, Adalgiza Fornaro<sup>c</sup>, Eduardo A. Orlando<sup>a</sup>, Tahuana L.B. Grigoletto<sup>a</sup>, M. Lucia A.M. Campos<sup>a,\*</sup>. The right-hand pane is labeled "Editable pane" and contains the following metadata: Author (Coelho, C. H., Allen, A. G., Fornaro, A., Orlando, E. A., Grigoletto, T. L. B., Campos, Miam), Year (2011), Title (Wet deposition of major ions in a rural area impacted by biomass burning emissions), Journal (Atmospheric Environment), and Volume (46). Annotations with arrows point to "Zoom options" (the zoom icons), "highlighter" (the highlighter icon), "sticky note" (the sticky note icon), and "Editable pane" (the right-hand metadata pane).

## Creating Groups

### My groups

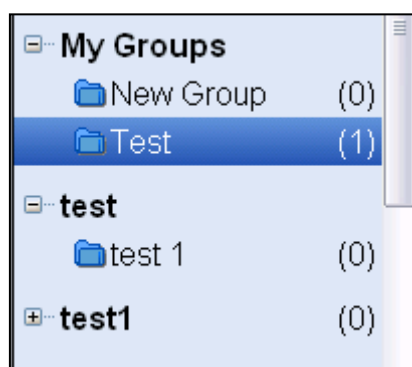
Groups can be created to collate together references on a particular topic.

- Click on the **groups** option on the menu bar
- Select **create group**
- Enter a **name** for your group
- **Drag and drop** references from your main library into any of your groups.

These group references are a copy and so all references also remain in the main library.

If you have a lot of groups you can also create **group sets** to organise your groups in a more manageable way.

- Click on the **groups** option
- Select **create group set**
- Drag and drop any of your individual groups into the group set.



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## Section 5: Select Other Bibliographic Styles

Bibliographic styles are files that are used to control the appearance of references in a bibliography. A set of standard styles is already installed in the EndNote software.

### Previewing the reference

- Select a reference
- Click on the **preview** tab in the bottom half of the pane

This will show you how the reference will look in your document using the selected output style.

To change the style:

- Click on the **drop-down menu** at the top of the page

You will see 3 default styles:

- Annotated (includes everything, including the abstract)
- Author-Date (Harvard style)
- Numbered

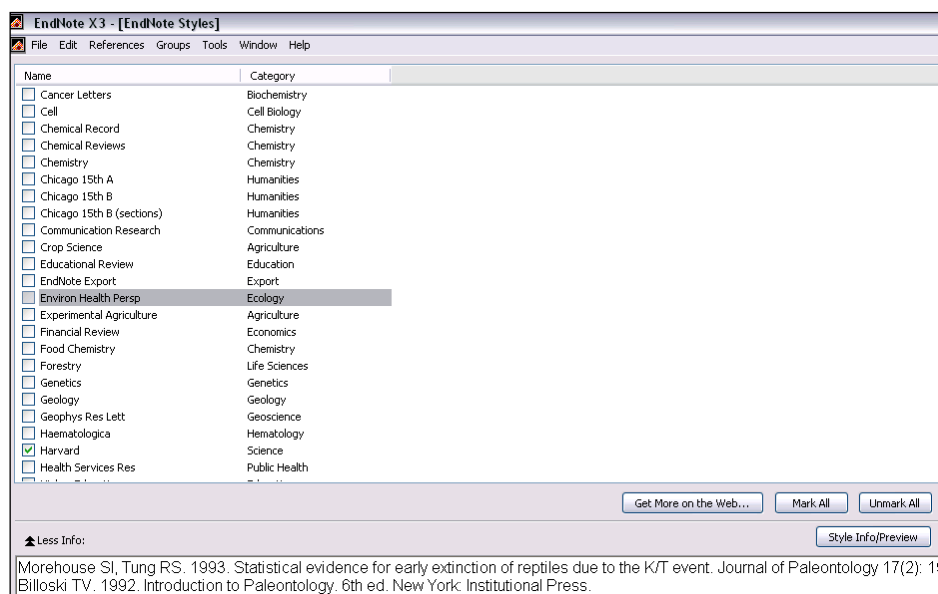
Select the **style** you want, or click on **select another style** to view more styles.

## Saving favourite styles

To view the styles available:

- Click on **edit**
- **Select output styles**
- Select **open style manager**.

After a short delay a list of journals for which output styles are available is displayed:



- Click on the **column** headings to sort by **name** or **category**
- Check the **boxes** to the left of the names to select styles for a list of **favourites** and close the window.

The lower window in the style manager shows more details of the styles (click **more info** if this is not showing).

The **style info/preview** will show you exactly how the reference will be displayed for this style.

If you wish to view more than the default styles:

- Click on the **get more on the web** button
- Find the style you want
- Click on **download**
- **Save** the file.

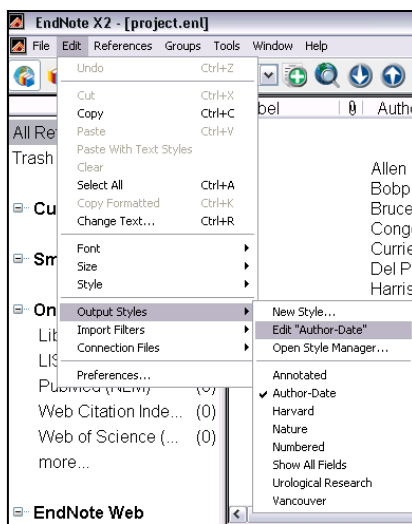
If you are using a locally installed version of EndNote on your own PC, you should download the file into the **styles folder** found within the EndNote folder where the program has been locally installed. Typically, this is on the C drive in the programs folder.

If you wish to save an output style to use on a networked PC, you should save the file to **my documents**. Note that this will only remain for the duration of your logged on session.

## Modifying output styles

EndNote has a wide range of output styles to suit different referencing styles and journal requirements, but occasionally you may not find one to suit your particular needs so it is possible to edit a style:

- Click on **edit** from the top menu
- Click on **output styles**
- Select the one that most fits your requirements
- Click on **edit**.



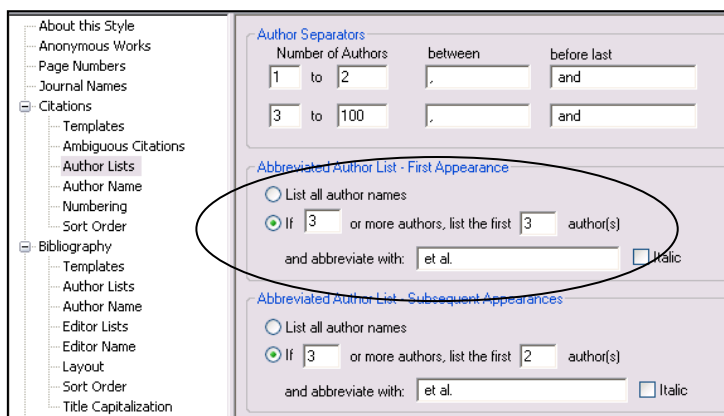
You can then modify how the **in-text citation** will look and how the reference will appear in your **bibliography**.

Some examples are given below:

### An in-text citations example

If you have a reference with three or more authors, you may wish to list three of them before *et. al.* rather than the default two authors:

- Click on **author lists** within the **citations** option
- Change the author list options appropriately.

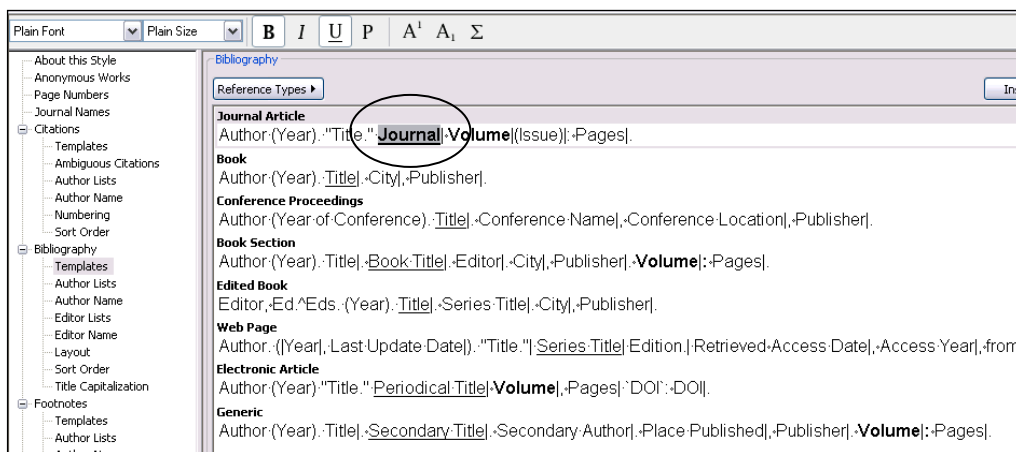


## A bibliography example

You may want to change the title of the journal from underlined to bold within your bibliography reference.

Within the **bibliography** section:

- Click on **templates**
- Under the **journal reference type**, select the word **journal**
- Use the **formatting buttons** at the top to change to bold.



You can then save a **copy** of the style.

### Tip: Saving changes to styles

If you are using a locally installed EndNote on your own PC, you should download the file into the **styles** folder found within the EndNote folder where the program has been locally installed. Typically, this is on the C drive in the programs folder.

If you are using a networked PC in a computer room and want to make you will be able to see your modified style again, save to your Z (network) drive. However, you must then make sure that EndNote is directed to your Z drive for this style.

- Go to the **edit** menu in EndNote
- Click on **preferences**
- Click on **folder locations**.

The location should be: Z:\EndNote\Styles

If you have been using a previous version of EndNote, you may find that the location is not correct and you will need to change it.

## Printing References

In order to simply print out a list of references:

- **Highlight** the relevant references (use the **ctrl** key to highlight several at once)
- Select a reference style, e.g. **author-date** or **numbered** from the **drop-down style** list at the top of the screen.

Note that a sample of the reference style is shown in the lower display window. If you wish the abstract to also be printed, click the **annotated** style.

- Choose **print** from the **file** menu. A standard print dialog will appear.
- Click **OK** to begin printing.

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## Section 6: Using EndNote with a Word Processor

This section demonstrates the facility which inserts EndNote commands to Microsoft Word's *Tools* menu to give you direct access to your references while typing your document in your word processor. This enables EndNote to do all of the bibliographic formatting work to the document that is currently open.

### Working with Word 2010 and Word 2007

#### Insert an EndNote Citation into the Paper

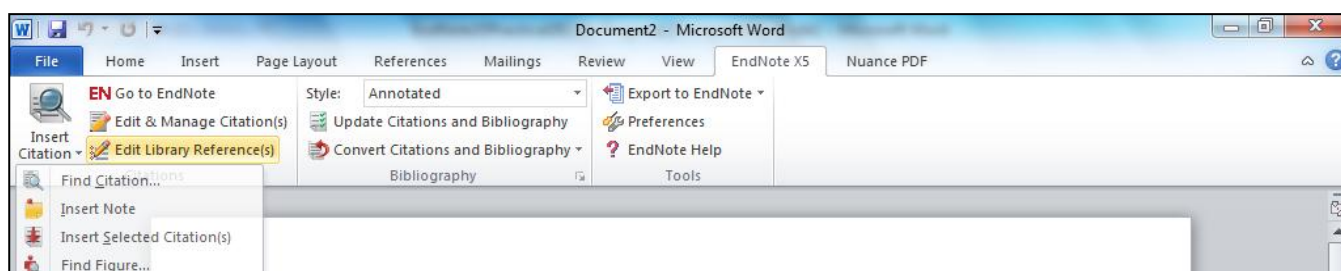
Open Word:

- Click on the **start** button
- Click on **all programs**
- Click on **Microsoft Office**
- Click on **Microsoft Word**

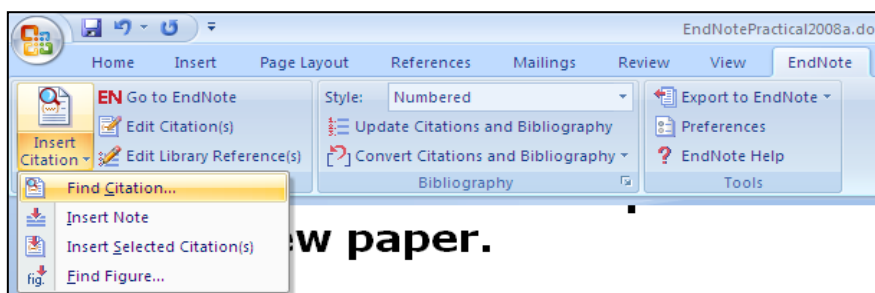
Open an existing paper or begin typing a new paper.

You should see that a tab for **EndNote X5** has appeared at the top of the screen. If you cannot see the EndNote tab, close down Word and reopen. Note that you always need to have your EndNote library open when working with Word.

- Click on the **EndNote** tab
- Click on **insert citation** in the top left-hand corner
- Click on **find citation**.




Note that in Word 2007 the EndNote tab looks slightly different (see below) but the same procedure applies.



**Find citation** will open a window where you can search EndNote for the reference you require.

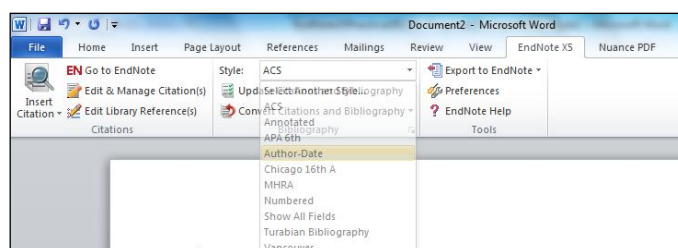
- **Highlight** the appropriate reference then click on **insert**. This will add the reference into the text in Word and begin creating the bibliography.
- Repeat the process until all references have been inserted.

Alternatively:

- Click on the **go to EndNote** option
- **Highlight** your chosen reference from your library
- Click on the **insert citation**  button
- **Save** your document.

### Format with a different bibliographic style

To format your reference list according to the reference style of your choice, click on the **drop-down menu** in the second column beside the word **style**.



You will see some default styles such as author-date and numbered and any other styles that you have previously selected or saved as favourites

**Select a style** and you will see that your in-text citation and bibliography will be reformatted according to that referencing style.

To see a full list of output styles, click on **select another style** from the drop-down menu and click on the style of your choice to reformat.

To browse styles by subject category rather than alphabetically, click on the **category** heading.

If you don't see the style that you want

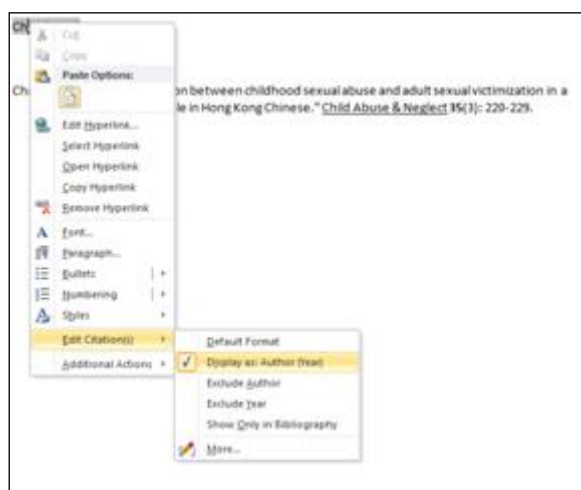
- Go back to your **EndNote** library
- Click on **edit**
- Click on **output styles**
- Click on **style menu**

- Click on the **get more on the web** button

## Editing a citation in the text of your document

### Removing the author using a Harvard style

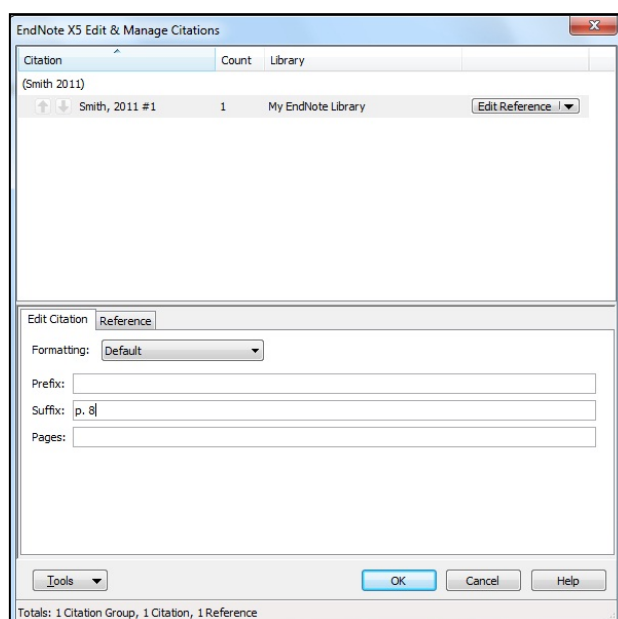
- Place your **cursor** on the citation
- **Right-click** on your mouse
- Click on **edit citations**
- Click on either the **exclude author** option or **display as author (year)** option.



Smith (Smith, 2003) argues that... can then be turned into Smith (2003) argues that...

### Including page numbers in your in-text citation

- Click on the **edit and manage citations** option in the top menu bar
- **Highlight** the appropriate citation
- Enter the page number(s) in the **suffix** box, adding p. or pp. before the number if you wish this to display



## Other editing options

You can remove citations altogether from the text, leaving them only in the bibliography:

- **Right-click** your mouse on the citation
- Click on **edit citations**
- Click on **show only in the bibliography**.

## Switching between EndNote and EndNoteWeb

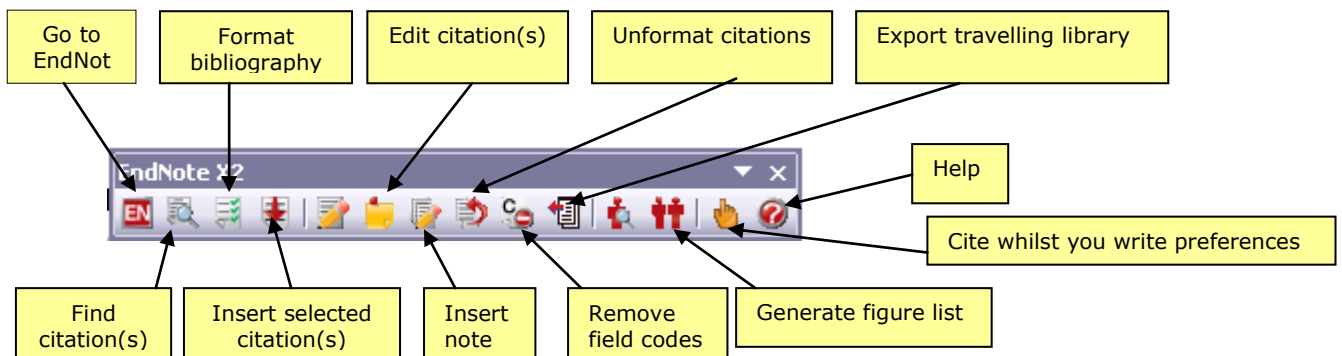
- In Word 2010 or 2007, to switch between working with EndNote and EndNoteWeb:
- Click on **preferences** in the third column of the **EndNote** *tab*
- Choose the **application** tab
- Click in the **radio button** to select **EndNote Web**
- **Login** with your email address and EndNoteWeb password.

## Working with Word 2003


### Insert an EndNote Citation into the Paper

Open Word and open an existing paper or begin typing a new paper.

Open the EndNote toolbar from the **view – toolbar** menus.



To add in a reference:

- Select **go to EndNote** from the toolbar
- Within EndNote **search** for the reference you require
- **Highlight** the appropriate reference and click on the  icon to insert the citation.

This will add the reference into the text in Word and begin creating the bibliography.

Repeat the process until all references have been inserted.

Alternatively, you can search for your references by:

- Clicking on the **find citation(s)** option from the toolbar
- **Search** for the appropriate reference and click on **insert**
- Choose **save** from your word processor's **file** menu.

(When working with EndNote in Word you can click on **tools > EndNote** to see a drop version of the toolbar if you prefer)

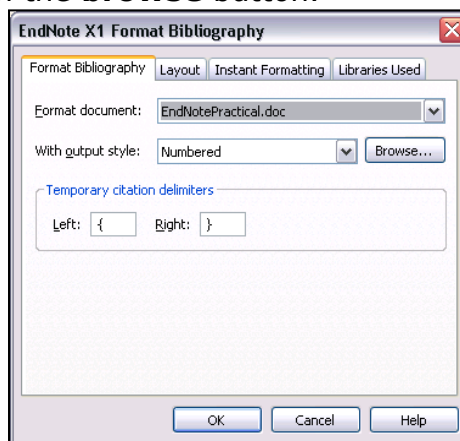
### To format again with a different bibliographic style:

- Choose **format bibliography** from your word processor's EndNote toolbar.



- A style confirmation dialog appears, prompting you to choose a bibliographic style for the paper.
- A format bibliography dialog box appears allowing you to select a particular style.
- Change the **with output style selection** to begin formatting the paper and bibliography in a new format.

To view more styles click on the **browse** button.



## Switching between EndNote and EndNoteWeb

In Word 2003:

- Click on the **tools** menu
- Select the **EndNote toolbar**
- Click **cite while you write preferences**
- Choose the **applications** tab
- Select **EndNoteWeb** from the application drop-down menu
- **Login** with your email address and EndNoteWeb password.

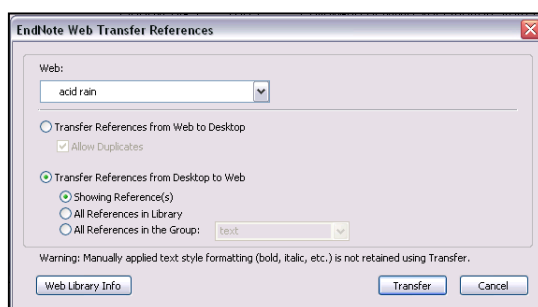
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## Section 7: Exporting references between EndNote and EndNoteWeb

To transfer references from your EndNote library to an EndNoteWeb library:

- Click on **EndNoteWeb** from the **tools** menu within the desktop version of EndNote.

- Choose the appropriate **EndNoteWeb library/group** from the drop-down menu.
- Click the radio button for **transfer references from desktop to web**  
Choose to:
  - Transfer references that are showing
  - Transfer all references in the library
  - Transfer references in the group (select your group from the drop-down menu)
- Click on **transfer** (Note that you can also transfer references from web to desktop.)



## Section 8: Exit from EndNote

Exit from EndNote by choosing exit from the **file** menu

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## Further Information

For frequently asked questions, see:

<http://www.nottingham.ac.uk/is/uon/knowledgebase/EndNote.php>

<http://www.EndNote.com/support/ensupport.asp>

For information on how to reference particular types of material, see:

<http://webct.nottingham.ac.uk>

- Click on the option for **pathway**
- Click on the button for **introductory modules and module 12: citing and referencing**

# Appendix

## Downloading from commonly use databases

The table below shows how you would download from some of the more commonly used databases.

Remember that databases can be provided by different suppliers. Make sure you download the correct supplier's filter. If in doubt ask your subject librarian.

Supplier	Database	Downloading from database	Importing into EndNote
CAS	SciFinder	<ul style="list-style-type: none"> <li>Click on <b>export</b></li> <li>Save references as <b>tagged format (*.txt)</b></li> </ul>	<ul style="list-style-type: none"> <li>Click on <b>import</b></li> <li>Choose <b>.txt file</b></li> <li>Choose <b>SciFinder (CAS)</b></li> </ul>
Ei	<b>Ei Compendex (Engineering Village)</b>	<ul style="list-style-type: none"> <li>Click on <b>download</b></li> <li>Select <b>RIS, EndNote, ProCite, Reference Manager</b></li> <li>Click on <b>download</b></li> <li>Click on <b>open</b></li> </ul>	<p>Correct import filter is selected automatically</p> <p>Some manual editing is necessary, e.g. the part/issue number is sometimes not picked up</p>
Elsevier	<b>Science Direct</b>	<ul style="list-style-type: none"> <li>Click on <b>export citations</b></li> <li>Content format: choose level of information that you require</li> <li>Export format: Choose <b>RIS format (for Reference Manager, ProCite, EndNote)</b></li> <li>Click on <b>export</b></li> </ul>	Correct import filter is selected automatically
Elsevier	<b>Scopus</b>	<ul style="list-style-type: none"> <li>Click on <b>export</b></li> <li>Choose <b>RIS format</b></li> <li>Choose the level of information that you wish to be imported</li> <li>Click on <b>export</b></li> <li>Click on <b>open</b></li> </ul>	Correct import filter is selected automatically
Google	<b>Google Scholar</b>	<p>Go to <b>Scholar Preferences</b>  <a href="http://scholar.google.co.uk/scholar_preferences?hl=en">http://scholar.google.co.uk/scholar_preferences?hl=en</a></p> <ul style="list-style-type: none"> <li>Set up the <b>Bibliography Manager</b> to show links to <b>import into EndNote</b></li> </ul> <p>Go back to your results in Google Scholar</p> <ul style="list-style-type: none"> <li>Click on the <b>import into EndNote</b> link</li> <li>Choose <b>open</b> file</li> </ul>	<p>Correct import filter is selected automatically</p> <p>Some manual editing may be required</p>
IEEE/IET	<b>IEEE/IET</b>	<ul style="list-style-type: none"> <li>Click on <b>download citations</b></li> <li>Choose the level of</li> </ul>	Correct import filter is selected automatically

		<p>information you wish to download</p> <ul style="list-style-type: none"> <li>Choose format: <b>EndNote, Procite, Refman</b></li> <li>Click on <b>download citation</b></li> </ul>	
NLM	<b>PubMed</b>	<p>There are 2 options:</p> <p><b>Saving as a text file</b></p> <ul style="list-style-type: none"> <li>From the PubMed results display click on drop-down menu beside <b>display settings</b> and choose <b>Medline</b>. Click on <b>apply</b></li> <li>Go to <b>file</b> and <b>save as</b> and save as a <b>text file</b></li> <li>Import the text file into EndNote using the <b>Pubmed</b> filter</li> </ul> <p><b>Online search</b></p> <ul style="list-style-type: none"> <li>In EndNote Click <i>on</i> <b>online search mode</b> and then <b>PubMed</b></li> <li>Enter your search</li> <li>Choose how many references you wish to import</li> <li>Click on <b>OK</b></li> </ul>	<ul style="list-style-type: none"> <li>Click on <b>file</b> and <b>import</b></li> <li>Choose <b>.txt file</b></li> <li>Choose <b>Pubmed (NLM)</b> filter</li> </ul>
OVIDSP	<p>Various databases including:</p> <ul style="list-style-type: none"> <li><b>AMED</b></li> <li><b>CAB Abstracts</b></li> <li><b>Embase</b></li> <li><b>Food science &amp; technology abstracts</b></li> <li><b>Inspec</b></li> <li><b>International Pharmaceutical Abstracts</b></li> <li><b>Medline</b></li> <li><b>PsycInfo</b></li> </ul>	<ul style="list-style-type: none"> <li>Click on <b>export</b></li> <li>Choose <b>export to EndNote</b></li> <li>Choose the amount of information to export. It may work better if you select <b>complete reference</b></li> <li>Click on <b>export citations</b></li> <li></li> </ul>	<p>Correct import filter is selected automatically</p> <p>Some manual editing may be required. E.g. when downloading from CAB Abstracts or Medline the year may be missing. (Exporting the <b>complete reference</b> rather than just the citation should solve this.)</p>
Proquest	<p>Various indexes including:</p> <ul style="list-style-type: none"> <li><b>ABI/Inform</b></li> <li><b>ASSIA</b></li> <li><b>Biological Sciences</b></li> <li><b>British Humanities Index</b></li> <li><b>Environmental Science &amp;</b></li> </ul>	<ul style="list-style-type: none"> <li>Click on <b>export</b></li> <li>Select export to <b>Procite, EndNote or Reference Manager</b></li> <li>Click <b>continue</b></li> <li>Click <b>open</b> and select the <b>EndNote library</b></li> </ul>	<p>Correct import filter is selected automatically</p>

	<b>Pollution Management</b> <ul style="list-style-type: none"> <li>• <b>Medline</b> and others</li> </ul>		
Thomson (TS)	Web of Knowledge including: <ul style="list-style-type: none"> <li>• <b>Web of Science</b></li> <li>• <b>BIOSIS</b></li> <li>• <b>Zoological Record</b></li> </ul>	<ul style="list-style-type: none"> <li>• Click on <b>save to EndNote</b> button</li> </ul>	Correct import filter is selected automatically

## What to do if the filter you need is not showing

EndNote lists only a few default filters. If any of the filters for the resources overleaf are not recognised, you may need to download the filter from the web.

In EndNote:

- Click on **edit**
- *Click on* **import filters**
- *Click on* **open filter manager**
- Click on the button **get more on the web**
- You can re-sort the list of filters by **database name** or **information provider**
- Click on download to download the necessary filter.

## Saving filters

### Using a networked PC in a computer room

Save the filter file to the **documents** area.

- Click on the **start** button
- Click on **computer**
- Click on **documents**
- Create a **new folder** called **EndNote**
- Within this folder, create a **sub-folder** called **filters**.

Note that this will only be saved for the duration of your logged on session.

### Using a PC with EndNote locally installed

Download the file into the filters folder where the EndNote program has been locally installed.

Typically, this is on the C drive in the **programs** folder > **EndNote** > **filters**.

If you are unsure, you can check where EndNote will be searching for the filter, by going to **edit** > **preferences** > **folder locations**.