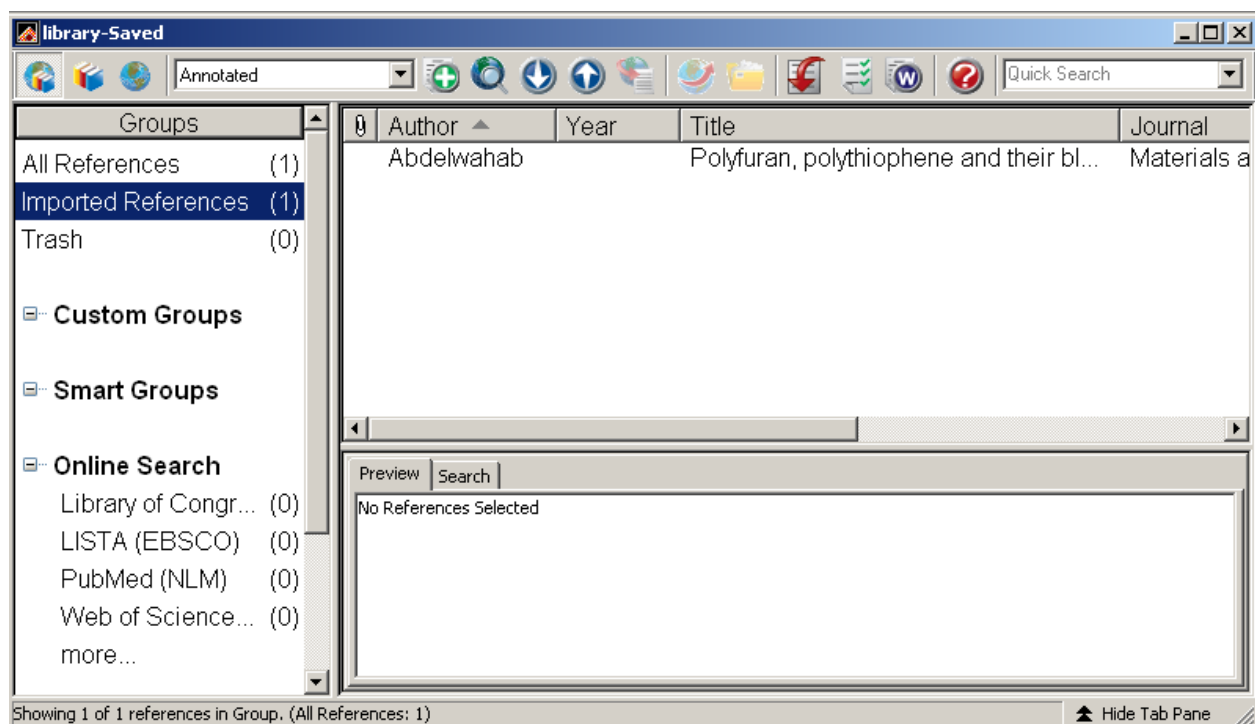


Building a Bibliography

Introduction to Endnote X3 Practical exercises



**Graduate School
Information Services
September 2010**

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 that 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.

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 be used on PCs in the libraries, Computing Centre and other IS Computer Rooms.

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

For off-campus use a personal licence is required and this is available from the suppliers, Adept Scientific. The cost at the time of writing is £55 plus VAT and delivery. You should tell them, when ordering, that you are a student at the University of Nottingham which has a CHEST site licence for the software. EndNote is available for Windows or Macs.

Adept Scientific plc,
Amor Way
Letchworth
Herts, SG6 1ZA. UK

<http://edustore.adeptscience.co.uk/> (select University of Nottingham from the list of institutions and login with your University of Nottingham username and password to see the academic rates)

Tel: 01462 480055
Fax: 01462 480213
e-mail: info@adeptscience.co.uk

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

To see more information about the differences between the desktop and web version, see:
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 latest version is X4 (i.e. 14) but the University currently supports version X3

Section 1: Opening EndNote and Creating a Library

Start EndNote and Create a Library

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

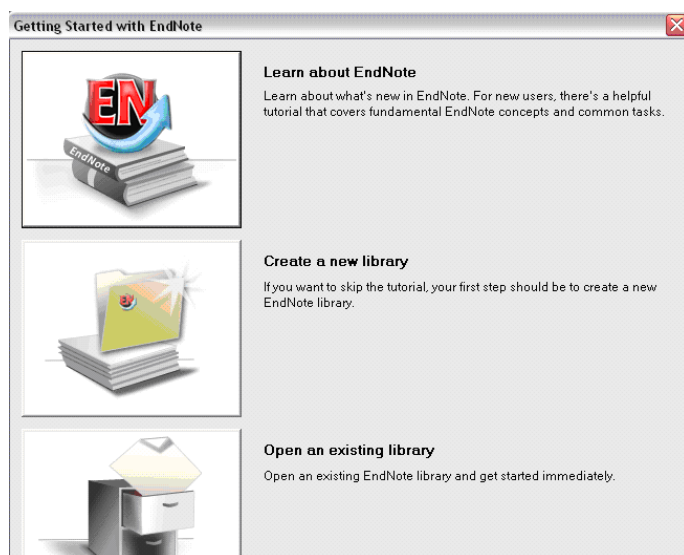
Click on the *Start* button, then click on *All programs*, followed by *EndNote* and then *EndNote Program*.

If you wish to use EndnoteWeb as well as EndNote, you can create an account at this point. Click on the *next* button and *register*.

If you already have an EndNoteWeb account, type in your *email address* and the *password* that you specified when registering and click on *Finish*.

If you don't want to work with EndnoteWeb, simply *cancel*.

The first time you open Endnote, you will be asked for 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* and 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 Z drive or to a memory stick.

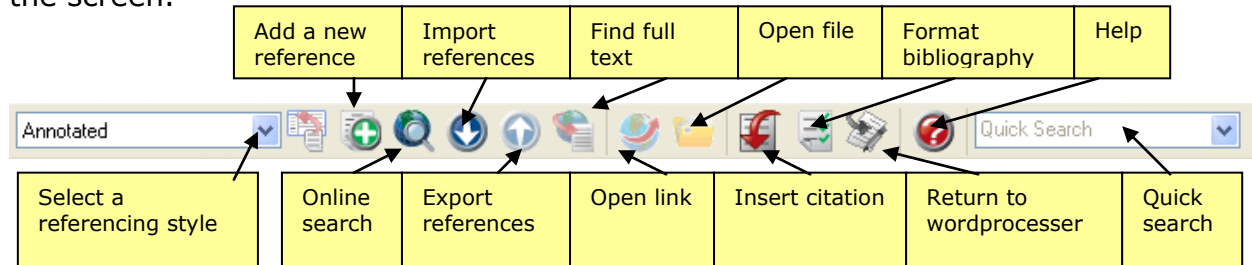
The next time you open Endnote, the library that you have created will automatically open.

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 however also access these functions from the drop-down menus at the top of the screen.



Section 2: Adding References

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

- Typing in references manually
- Importing references automatically from an online database

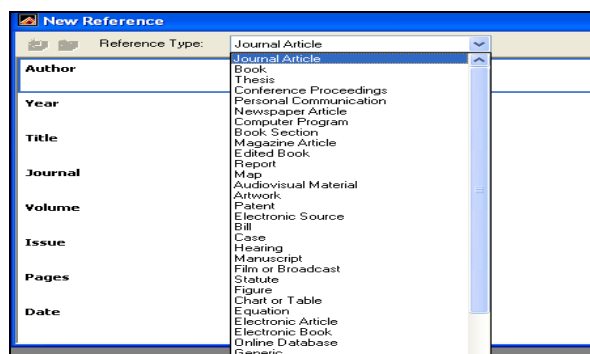
Create a New Reference Manually

Open a library and choose *New Reference* from the *References* menu or click on the



symbol. An empty Reference 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 of reference using the Reference Type drop down menu at the top of the New Reference window.



Enter the information in the relevant fields: author, title date etc. Move between fields by pressing Tab. Except for authors which are entered Surname, initials

(separated by full-stops, e.g., Smith, J. E.) no extra punctuation is entered into the reference; EndNote adds the necessary punctuation and text style changes to the references when it creates a bibliography.

Tip: Entering author names

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 the reference 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, open the reference by double clicking on it and see the footer

Section 3: Importing references from databases

You can use Endnote to save references from bibliographic databases or from library catalogues by importing them electronically into your EndNote library. There are two methods, as explained below, a direct import facility is available for some databases but other require you to save a file of references which are then imported using an appropriate filter.

For references to be imported with any of the EndNote filters, the data must be consistently "tagged," with each tag starting on a new line, and the file saved as a text file, as in these examples:-

AU- CRAMER, -Z.O.

TI- AQUATIC MACROPHYTES AND LAKE ACIDIFICATION

PY- 1993

SO- ENVIRONMENTAL-POLLUTION. VOL. 5, NO. 2, PG.54-79

Author: Cramer, ZO

Title: Aquatic macrophytes and lake acidification

Year: 1993

Source: Environmental Air Pollution. Vol. 5, (2) pp.54-79

The tags enable the software to recognise which part of the reference is which and save them into the various fields correctly.

Tip: Transferring references from Word

Because tags are needed for Endnote to read the reference, you cannot transfer references directly from Word to Endnote. Try finding the references again using a database and importing them directly

The following exercises describe saving references from databases in two ways, one using direct download and the other using saved text files and import filters.

NB. 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.

This method uses a simple direct import button to copy references from the Web of Science database straight into EndNote.

Access the Web of Science from the eLibrary Gateway

(<http://www.nottingham.ac.uk/elibrarygateway>) or launch from the library tab in the portal.

Click on the titles tab and type in web of science. Click on the link for the web of science.

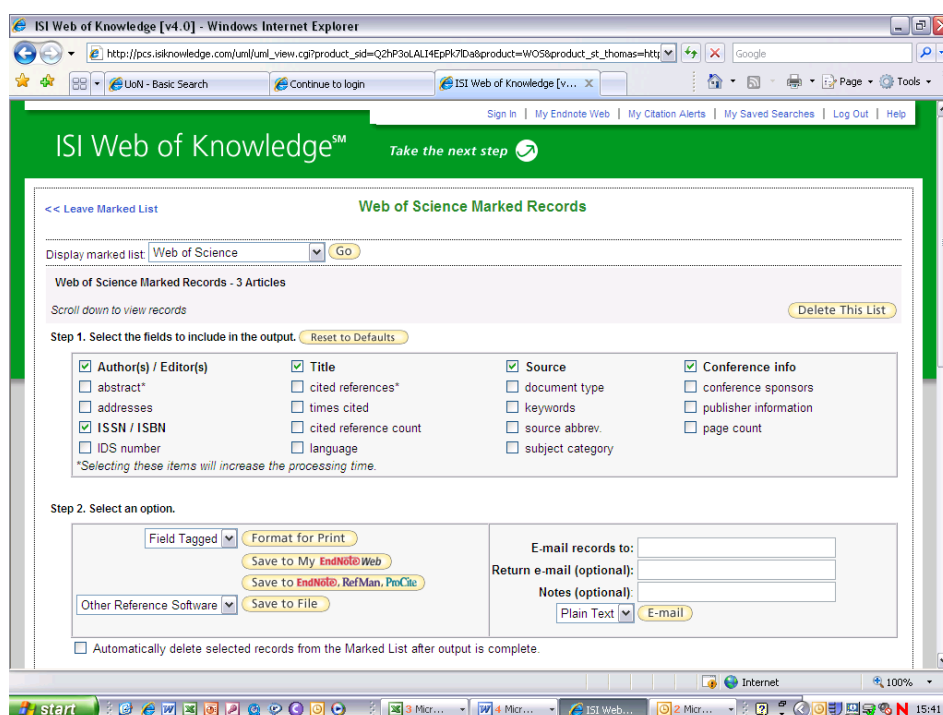
Conduct a search and mark some relevant references by ticking the boxes and then clicking on *Add to Marked List*.

Now click on the *Marked List* button at the top of the screen to view the selected references.

Select any extra details e.g. abstract, keywords as required and then click on the *Save to Endnote* button (NB not *Save to my to EndNote Web*).

Tip: Further help

For more information on searching databases, see Pathway at <http://webct.nottingham.ac.uk>



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 within EndNote into which you wish to import your references.

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*

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.

3.b Non-direct export

Importing from Cambridge Scientific Abstracts Collection

This collection of databases covers a range of subject areas.

This method involves two steps: 1) saving references as a text file and 2) importing the file into Endnote using a filter.

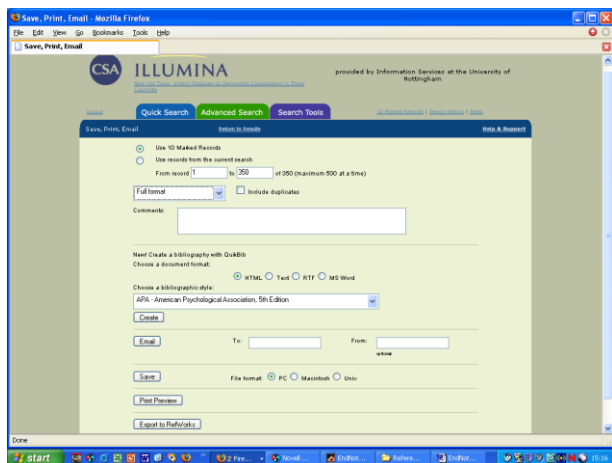
Access the databases from the *eLibrary Gateway* (<http://www.nottingham.ac.uk/elibrarygateway>) or launch from the *library tab* in the *portal*.

Click on the *titles* tab and type in CSA to view all databases within Cambridge Scientific Abstracts. Choose a database that most suits your subject interests.

Perform a search and mark some relevant references.

Step1: Saving references as a text file

From the display screen click on the *Save/Print/Email* button which appears above the first reference in the list of references displayed. The window below will appear.




Click on the *Save* button towards the bottom of the screen, selecting whether you are using a PC or a Mac as appropriate. Give your file a name and save it as type *Text File (*.txt)* or type in the file suffix ".txt" after the file name to create a text file.

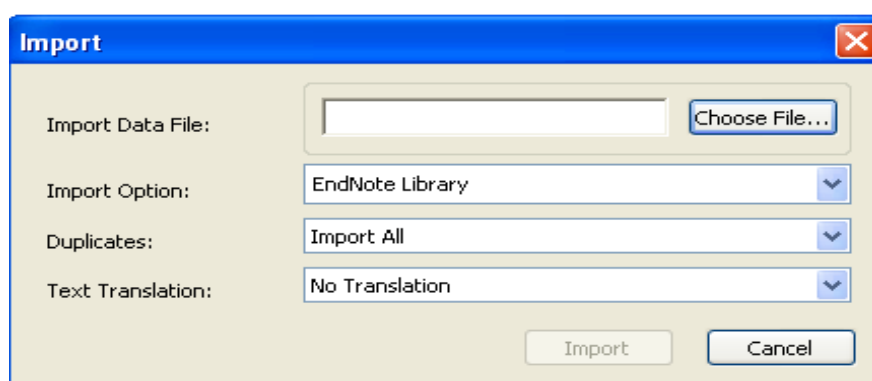
Save it into a directory and note where this is so that you can recover the file again to import it into EndNote as follows.

Step 2: Importing the Saved References into EndNote

1. In EndNote open the library into which you want to import the references.

2. Choose *Import...* from the *File* menu or click on the  icon and the following window will appear:-

3. Click *Choose File...* to locate and open the file of references you want to import. (All files, except for EndNote libraries, must be plain ANSI or ASCII text files.) Select the file and click Open.



4. Endnote only shows two CSA filters by default, so no matter which CSA database you have used, select the import filter *e-psyche (CSA)* from the Import Option list. If you can't initially see this filter, click on **other filters** and select *e-psyche (CSA)*.

Please note that this filter does not work 100% and some manual editing may be necessary. For example, journal articles are usually imported correctly, but other material types such as books or reports may not import correctly. You may find that Endnote thinks these are journal articles and you will need to change the reference type accordingly.

You may find that the specific filter for the CSA database may work more effectively. If you wish to use the specific filter you will need to download it from the Endnote filters website. For more information on downloading filters, see section 3c.

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*.

3c: Importing from some other commonly-used databases

Databases we have at Nottingham and from which you can import include those listed below. The table below shows the format in which you need to save your references and the name of the import filter required. For details on how to import from other databases please ask your subject librarian.

Downloading further filters

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

In Endnote, click on *Edit > Import Filters > Open filter manager* and click on the button *Get more on the web*. You can resort the list of filters by *database name* or *information provider*. Click on *Download* to download the necessary filter.

Saving filters

If you are using a networked PC in a computer room, you should save the filter file to *My Documents*. You must first of all create a folder within My Documents called *Endnote* and within that folder, create a sub-folder entitled *filters*. Note that this will only be saved for the duration of your logged on session.

If you are using a locally installed Endnote on your own PC, you should 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*.

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

Supplier	Database	Instructions	Filter
Cambridge Scientific Abstracts (CSA)	Various indexes including: CSA Illumina, British Humanities Index, ASSIA, Metadex and many more	<ul style="list-style-type: none"> • Click on <i>save/print/email</i> • Save File • Format:PC or Mac as appropriate • Save as (*.txt) 	<ul style="list-style-type: none"> • Click on <i>File</i> and <i>import</i> • Choose .txt file • Choose import option e-psyche (CSA) or download the specific filter
CAS	SciFinder	<ul style="list-style-type: none"> • Click on <i>Export</i> • Save references as 	<ul style="list-style-type: none"> • Click on <i>File</i> and <i>import</i>

		tagged format (*.txt)	<ul style="list-style-type: none"> Choose .txt file Choose SciFinder (CAS)
Ei	Ei Compendex (Engineering Village)	<ul style="list-style-type: none"> Click on <i>Download</i> Select "<i>RIS, EndNote, ProCite, Reference Manager</i>" Click on <i>Open</i> 	<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	Science Direct	<ul style="list-style-type: none"> Click on <i>export citations</i> Content format: choose level of information that you require Export format: Choose <i>RIS (Reference manager, ProCite, Endnote)</i> Select your library 	Correct import filter is selected automatically
Elsevier	Scopus	<ul style="list-style-type: none"> Click on <i>export</i> Choose <i>RIS format</i> Choose the level of information that you wish to be imported Click on <i>export</i> Click on <i>open</i> Select your library 	Correct import filter is selected automatically
Google	Google scholar	<ul style="list-style-type: none"> You will need to configure Google Scholar to send references to Endnote. See: http://www.endnote.com/support/Faqs/Import/faq11.asp Use the <i>Import into Endnote</i> link Choose <i>open</i> file 	<p>Correct import filter is selected automatically</p> <p>Some manual editing may be required</p>
IEEE	IEEE/IET	<ul style="list-style-type: none"> Click on <i>download citations</i> Choose the level of information you wish to download Choose format: <i>Endnote, Procite, Refman</i> Click on <i>download citation</i> Choose your library 	Correct import filter is selected automatically
NLM	PubMed	There are 2 options:	

		Online search <ul style="list-style-type: none"> Click on <i>PubMed</i> in the <i>online search group</i> in Endnote Choose how many references you wish to import Click on <i>OK</i> Saving as a text file <ul style="list-style-type: none"> Click on drop-down menu beside <i>display settings</i> and choose <i>Medline</i>. Click on <i>apply</i> Go to <i>File</i> and <i>Save as</i> and save as a <i>text file</i> Import the text file into Endnote using the <i>Pubmed Import</i> 	<ul style="list-style-type: none"> Click on <i>File</i> and <i>import</i> Choose .txt file Choose Pubmed (NLM) filter
OvidSP	Various databases including: <ul style="list-style-type: none"> AMED CAB Abstracts Embase Food science & technology abstracts Inspec International Pharmaceutical Abstracts Medline PsycInfo 	<ul style="list-style-type: none"> Click on <i>Export</i> Choose <i>export to Endnote</i> Click on <i>export citations</i> Choose your <i>Endnote library</i> 	Correct import filter is selected automatically Some manual editing may be required. E.g. when downloading from CAB Abstracts, the year is not included
Thomson (TS)	Web of Science	<ul style="list-style-type: none"> Click on <i>save to endnote</i> button 	Correct import filter is selected automatically

Importing from the Nottingham eLibrary Gateway

References retrieved through meta searching on the eLibrary Gateway can easily be imported with a simple procedure.

Select the databases that you wish to search

Enter your search terms

1. Add items to your basket and view them by selecting My Space and then eShelf.
2. Select records by marking the boxes and then click *Selected* to get a window containing the chosen references. Here click on
3. Save and select Record Format *Citation manager* and click save.
4. References will be automatically imported, but may need some editing.

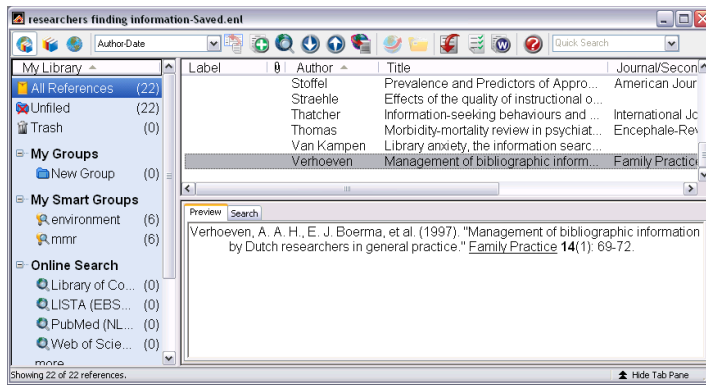
This method can be used to import references from the Library Catalogue, UNLOC.

You have now created a library by inputting references automatically from databases and by manual typing. The next set of exercises look at handling references in a library.

Section 5: Managing references

Displaying references

When you open a Library you see the Library window listing all of the references that the library contains:

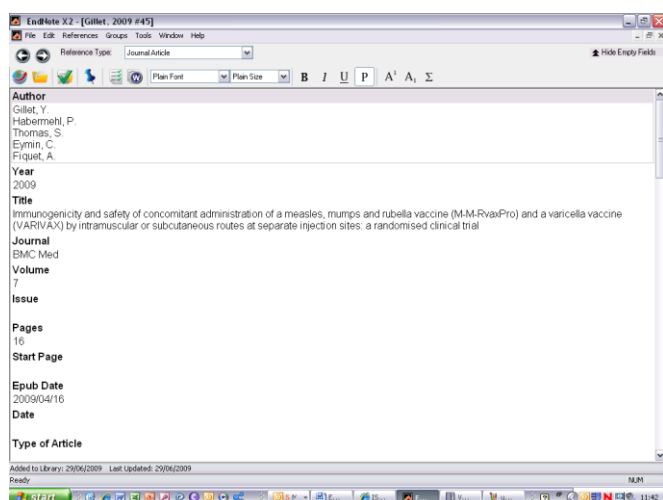


For each reference, the Library window displays the first author's last name, the year, and as much of the title as will fit in the window. (The default display can be altered in the Display Fields menu under *Edit – Preferences and Display Fields*). If you highlight a particular reference more detail is shown in the lower half of the window in the chosen 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 double clicking on a selected reference in the list. Chose one of the references you have retrieved from a database.

The Reference window opens to display all of the information associated with the reference. This is where you enter or edit information for a reference. The citation information displayed at the top of the Reference window (e.g. Argus, 1991 #11) is used by EndNote to match citations in a paper to references in a library.



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.

Linking to the Full-text

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

Automatic linking

If you use a database such as Web of Science or PubMed, an html link to the database 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 and click on *references* from the top menu and the *URL* option, followed by *openURL*. Please note that not all journals in these databases will be subscribed to by the University.

Typing in the URL

You could 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.

Attaching files manually

To attach a PDF file, right click the reference in the list view, select file attachments and attach file. Then browse for the document.

Automatically finding the full-text

If the University subscribes to the full-text 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 > Preferences > Find Full Text*.

In the OpenURL path enter: http://sfx.nottingham.ac.uk:80/sfx_local
Click on *OK*.

Highlight the reference(s), then click on the *references* option in the top menu and choose *find full text*. You will then need to accept the copyright statement. Endnote will then search for the full-text (this can take several minutes) and if found, a *paperclip icon* will display next to the reference.

To view the PDF, double-click on the reference and scroll down to the *file attachments* field. Double-click on the file icon to open. Or, right-click on the paperclip icon and scroll down to the file attachments option and click on open file.

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.

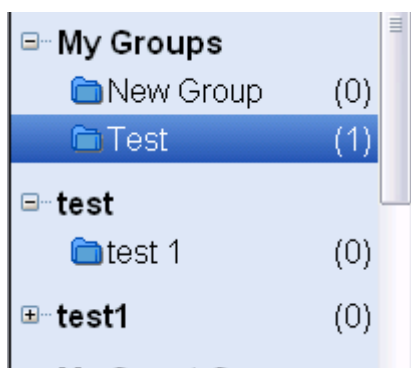
To check whether we do subscribe to the full-text, click on the *references* option from the top menu bar and click on the *URL option* and then *OpenURL Link*. This will take you to the SFX window and clarify whether the full-text is available or not.

Creating Groups

My groups

Groups can be created to collect together references on a particular topic. Click on the *groups* option on the menu bar and select *create group*. Enter a *name* for your group. You can then simply *drag and drop* references from your main library into any of your groups. The references will show in your group, but 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 and *create group set*. Then drag and drop any of your individual groups into the group set.



Smart groups

Smart groups allow you to set up a search strategy and any references that match that search strategy will automatically be moved to the relevant smart group. To set up a smart group, go to *Groups* and *Create smart group* and enter your search strategy and click on *Create*.

To edit the search terms for the smart group, right-click on the group name in the groups panel and select *Edit group*.

Note that smart groups are a temporary location for references. There is no facility to manually move references from all references or from a custom group into a smart group. It is advisable to move references from a smart group into a custom group if you wish to be able to manually move references as well as dynamically populate the group. A smart group can have the same name as a custom group.

Search for a Set of References

Choose *Search Library* from the Tools menu to open up a search box in the bottom pane.

Type in a search word in the first search item and select the field in which you wish to search.

To find references from e.g. 2001 or later, type in the date in the search window, choose *Year* from the drop down field list in the second search item. Then change "*Contains*" to "*is greater than or equal to*" from the drop down comparison list in the Search window. Search terms can be linked with AND and OR.

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

The screenshot shows a 'Search' window with a 'Preview' tab and a 'Search' tab. The 'Search' tab is active, displaying a search strategy with three rows. Each row has a dropdown for 'And' (set to 'And'), a dropdown for the field (set to 'Any Field', 'Year', and 'Any Field' respectively), a dropdown for the comparison (set to 'Contains', 'Is greater than or equal to', and 'Contains' respectively), and a text input field (containing 'extinction', '1990', and an empty field respectively). To the right of each row are '+' and '-' buttons. At the bottom, there is a 'Search' button, an 'Options...' button, a 'Search Whole Library' dropdown (set to 'Search Whole Library'), and two checkboxes: 'Match Case' and 'Match Words'.

Extra lines to combine more than three searches 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 references that are showing. For example, you could select a *group* and then choose *Search showing references* from the drop-down menu.

If you wanted to convert your search to a smart group, click on *Options*, followed by *Convert to Smart Group*.

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

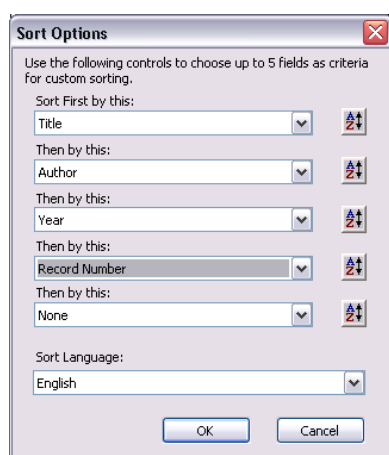


Sort References

The *Sort References* command is used to sort the references in the library window.

By default, the library window is sorted alphabetically by first author. You can sort by displayed fields by clicking on the column headings. To sort references by other fields:

Choose *Sort Library* from the Tools menu.



Use the *drop-down menus* to choose the field(s) to be used for sorting.

Click on the button to the right of the field to specify ascending or descending order.

Click on *OK*.

Tip: Print References

In order to simply print out a list of references, you first select references by highlighting them with the mouse, using the *Ctrl* key to highlight several. Then 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.

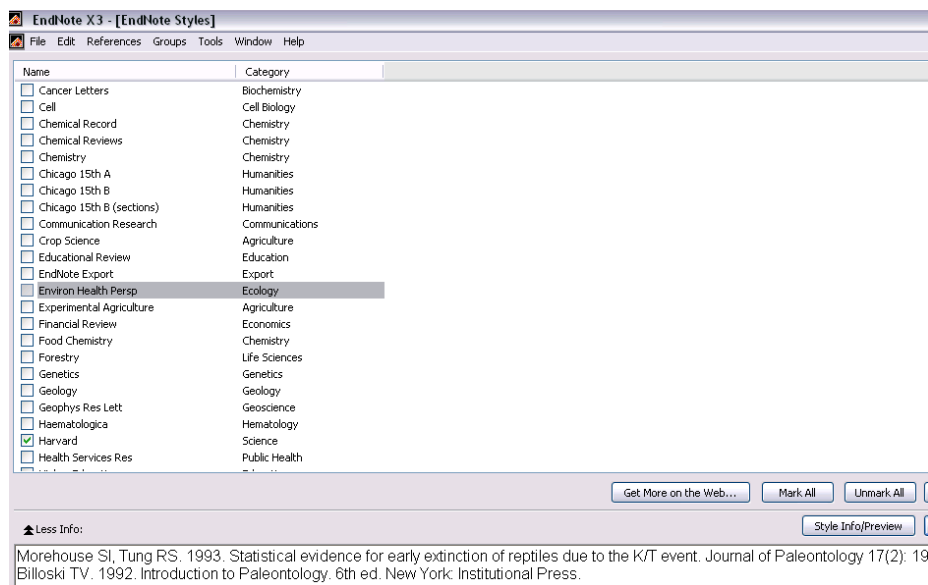
Choose *Print* from the *File* menu. A standard print dialog will appear. Click *OK* to begin printing.

Section 6: 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. Styles can be modified and new styles can be created using EndNote's style editor.

To view the styles available click on *Edit, Output Styles* and then *Open Style Manager* in Endnote.

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.

Click in the boxes to the left of the names to select styles for a list of "Favourites". These will appear in the *Output Styles* list under *Edit* in Endnote.

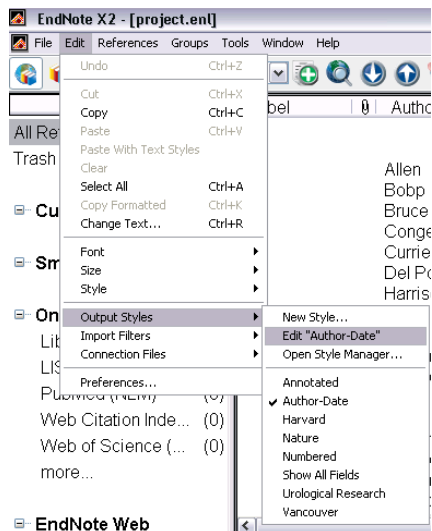
By clicking on the "More Info" button you will be able to see the full details of a style. Clicking on the *style info/preview* will show you exactly how the reference will be displayed for this style.

If you wish to view more than the default styles, click on the *Get more on the web* button. Find the style you want and click on *download*. Save the file. 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 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

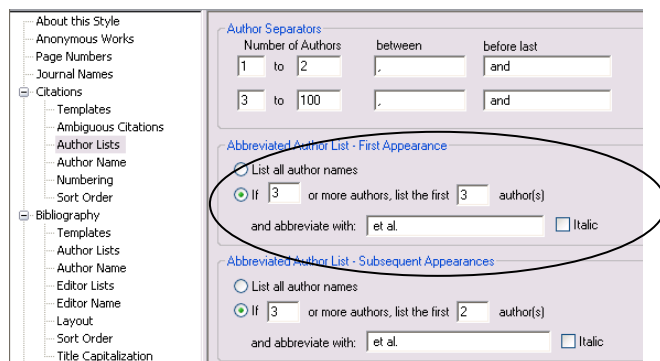
EndNote has a wide range of output styles to suit different referencing styles and journal requirements, but occasionally you may not find a style to suit your particular needs so it is possible to edit a style.

Click on *Edit* from the top menu and then *output styles*. Select the style that most fits your requirements (e.g. author-date) and click on *edit* (e.g. edit author-date)

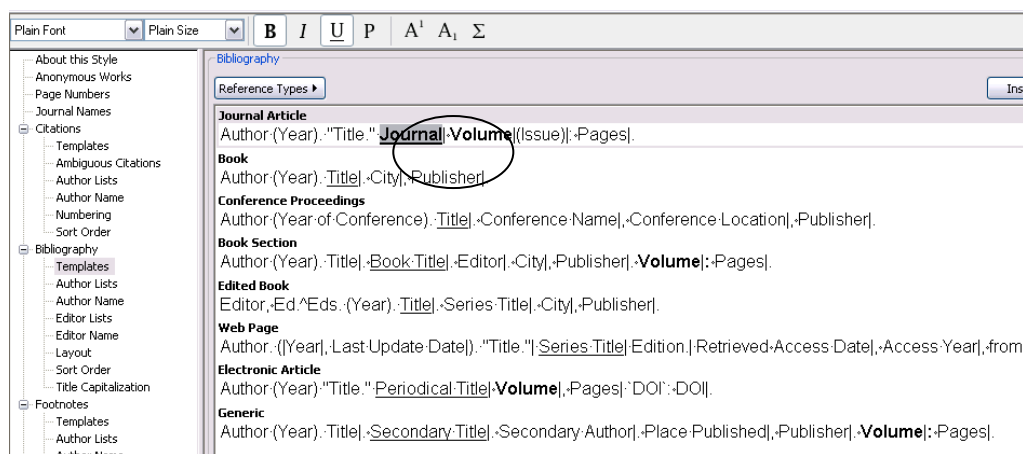


You can then modify how the *intext* citation will look and how the reference will look in your *bibliography*.

For example, if you have a reference with 3 or more authors, you may wish to list 3 authors before the word et. al. rather than the default 2 authors. Click on *author lists* within the *citations* option and change the author list options appropriately.



Another example could be changing the title of the journal from underlined to bold within your bibliography reference. Within the *bibliography* section, click on *templates* and select the word *journal* and 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 be sure to be able to see your modified style again, save to your Z (network) drive. However, you must then make sure that Endnote looks to your Z drive for this style. Go to the *Edit* menu in Endnote, click on *preferences* and then *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.

Section 7: Using EndNote with a Word Processor

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

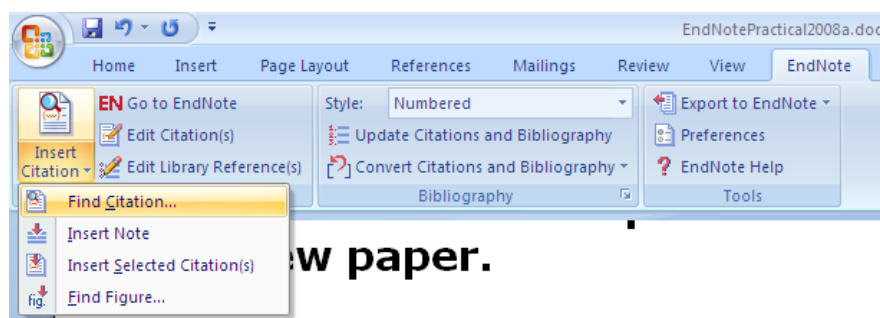
Working with Word 2007

Insert an EndNote Citation into the Paper

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


You should see that a tab for *EndNote* has appeared. 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 and click on the option to *Insert citation* and then click on *Find Citation*



This will take you to EndNote where you can search 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.

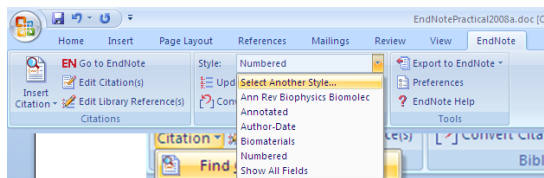
Repeat the process until all references have been inserted.

Alternatively, you can click on the *Go to EndNote* option, highlight your chosen reference from your library and click on the *insert citation*  button

Then *save* your document

To format again 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 intext 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.

Tip: Switching between Endnote and Endnoteweb

To switch between working with Endnote and Endnoteweb, click on *preferences* in the third column of the Endnote tab. Choose the *applications* tab. Select *EndNoteWeb* from the drop down menu and login with your email address and Endnoteweb password.

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

Tip: Editing a citation

To exclude the author from your citation, click on *Edit citation* in the top left. Select the author you wish to remove and click in the *exclude author* checkbox.

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

Follow a similar procedure to exclude the year from your citation. E.g. In 2003 (Smith, 2003), it was argued that... can be turned into: In 2003 (Smith), it was argued that...

To include page numbers in your citation, click on: *Edit citation* in the top left and enter the page number(s) in the *suffix* box, adding p. or pp. before the number if you wish this to display.

To remove a citation completely, click on *Edit citation*, highlight the citation and click on *remove*.

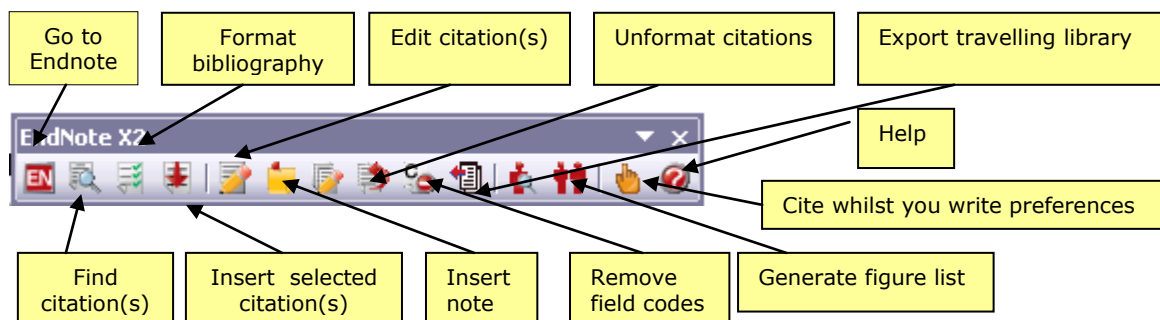
Working with Word 2003

Insert an EndNote Citation into the Paper


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

Open the EndNote X2

toolbar from the *View – Toolbar* menus.



To add in a reference, select *Go to Endnote* from the toolbar.

This will take you to EndNote where you can 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. Then 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.

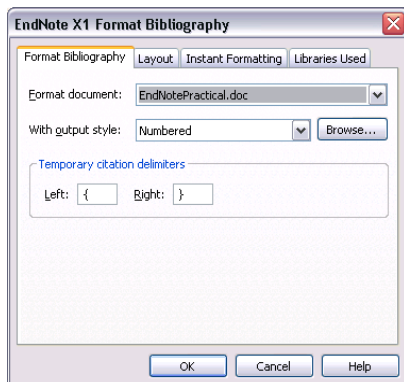


A style confirmation dialog appears, prompting you to choose a bibliographic style for the paper.

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.



Tip: Editing a citation

To exclude the author from your citation, click on *Edit citation* in the top left. Select the author you wish to remove and click on *remove*.

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

To include page numbers in your citation, click on: *Edit citation* in the top left and enter the page number(s) in the *suffix* box, adding p. or pp. before the number if you wish this to display

Switching between Endnote and Endnoteweb

In Word 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* and login with your email address and Endnoteweb password.

In Word 2003, go to the *Endnote toolbar* from the *tools* menu, click *cite while you write preferences*. Choose the *applications* tab. Select EndNoteWeb from the application drop-down menu and login with your email address and Endnoteweb password.

Section 8: Exporting references between Endnote and EndNoteweb

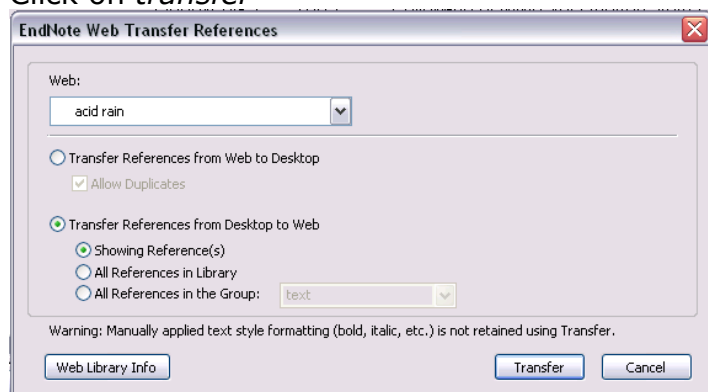
To transfer references from your Endnote library to an Endnoteweb library, click on *Endnoteweb* from the *tools* menu within the desktop version of Endnote

Choose the appropriate Endnoteweb library/group from the drop-down menu.
Click in 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*



Section 9: Exit from EndNote

Exit from EndNote by choosing *Exit* from the *File* menu

Further Information

For frequently asked questions, see:

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

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

Online tutorials available at:

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

- Click on the option for *Pathway*
- Click on the button for *Advanced modules* and *module 10: Managing references*

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*