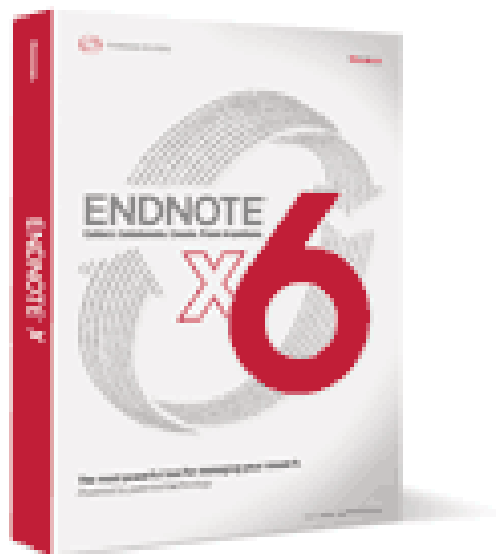


# **EndNote Introduction for Referencing and Citing**

## **EndNote X6 Practical exercises**



**Information Services  
October 2012**

# Table of Contents

<b>Section</b>	<b>Page no.</b>
Section 1: Introducing EndNote	3
Section 2: Opening EndNote and Creating a Library	4
Section 3: Adding References	6
Section 4: Importing references from PDFs	7
Section 5: Importing references from databases	8
Section 6: Managing references	12
Section 7: Linking to and Viewing the Full-text	14
Section 8: Creating Groups	17
Section 9: Select Other Bibliographic Styles	18
Section 10: Using EndNote with Word 2010 and 2007	22
Section 11: Syncing your EndNote and EndNote Web Libraries	25
Section 12: Exit from EndNote	27
Section 13: Further Information	27
Appendix: Downloading from commonly use databases	28

## Section 1: 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/Desktop 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 EndNote Web (<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 synchronised so references can be viewed in both systems.

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

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

[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 – X6 (i.e. 16).

Wherever possible, we recommend you work with the same version. However, you should be able open your EndNote libraries in earlier versions and vice versa. If you are working with different versions, it is recommended that you unformat your Word document to ensure that there is no chance of corruption (form more information see section 10)

---

## Section 2: Opening EndNote and Creating a Library

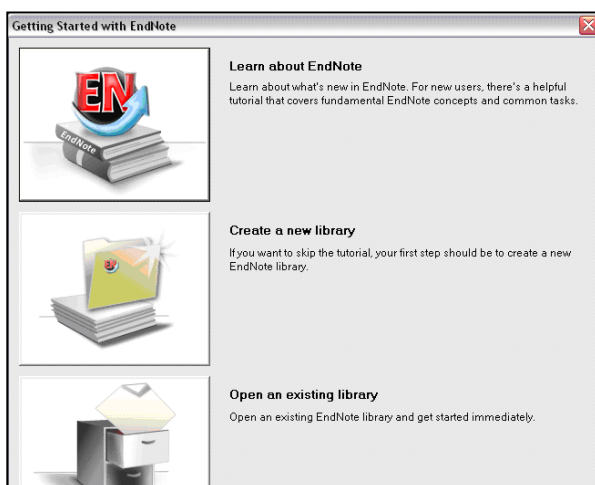
### Start EndNote and Create a Library

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.**

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*
- Click on *Libraries*
- 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.

When you save a library, EndNote always creates a file and a data folder. These must always stay together to ensure that the program works correctly.

### 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 8)

## Backups

It is always a good idea to create a backup of your library in case your original gets corrupted.

- Click on **file > save a copy**

Make sure you update your backup if you change anything in your original.

## Understanding the layout

Your library will open with 3 columns

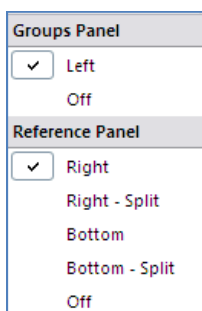
**First column:** Groups, online search options, find full-text options

**Second column:** Your master list of references

**Third column:** Quick edit, allowing you to quickly edit an existing reference, preview the reference in a selected referencing style or view a PDF.

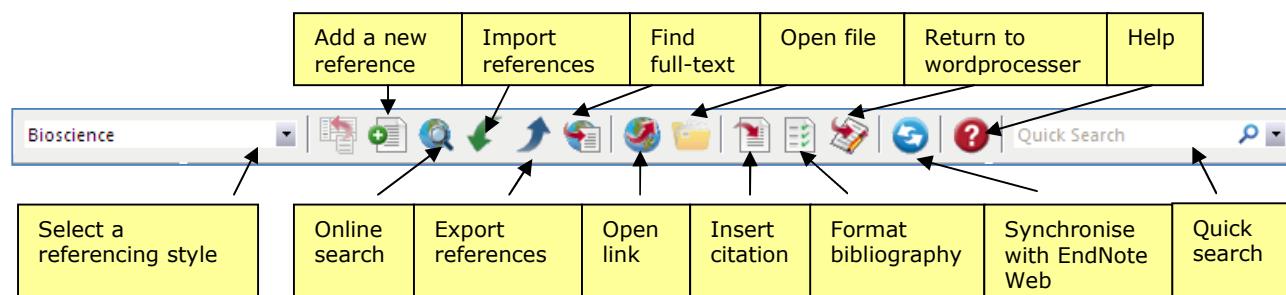
You can change the size of any of the windows by **dragging** the panes

You can change the layout by clicking on the **layout drop-down menu** in the bottom right corner of the page.



## 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 3: Adding References

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

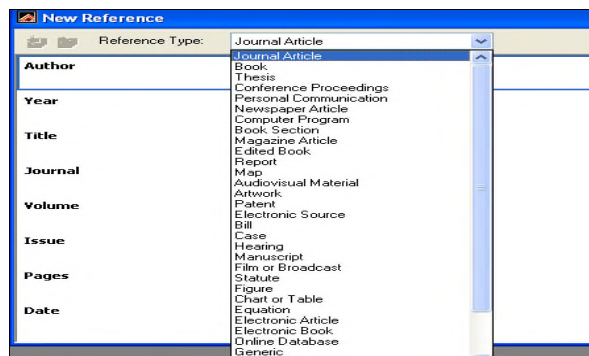
- Type in references manually
- Import bibliographic details from a PDF
- Import references automatically from an online database

### 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, year, title 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,**

## Adding ratings

In the ratings field at the top, click the **stars** to add a required rating (1-5). This will display in the main window and allows you to rate references according to relevance or other factors. You can also **search** for references by their rating.

Close the reference window by clicking on the **cross**. You will then be prompted to **save** the information and the reference is automatically saved as a new reference in your library.

### Tip: Knowing when a reference was added

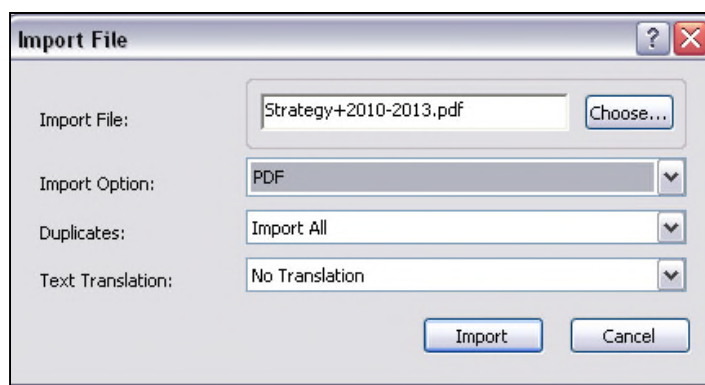
To see when a reference was added or updated view the **last updated** column or open the reference by double-clicking on it to see the last update displayed in the footer.

## Section 4: Importing references from PDFs

If you have a PDF you can in some instances import the details directly from the PDF into EndNote.

- Click on **file**
- Click on **import > file**
- Find your PDF file
- Choose **PDF** from the drop-down menu

The bibliographic details will automatically be populated in EndNote and the PDF file will also be attached to the reference.



If you have multiple PDFs in a folder, follow the same instructions as above but from the **file** menu, choose **import > folder**

Tick the **checkbox** if you want all files in **subfolders** importing also.

### Tip: Will it work for all PDFs?

EndNote looks for the DOI within a PDF to extract the bibliographic details. If a DOI is not available, EndNote may not be able to extract the information.

## Section 5: 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 or RIS 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.

### 5a: Direct Export


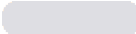
#### Importing references from Web of Science

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 **find resources** section of the **library tab** on the **Portal**. (<http://portal.nottingham.ac.uk>). If you can't see the Web of Science listed, click on **find more resources**.

##### Importing references to EndNote

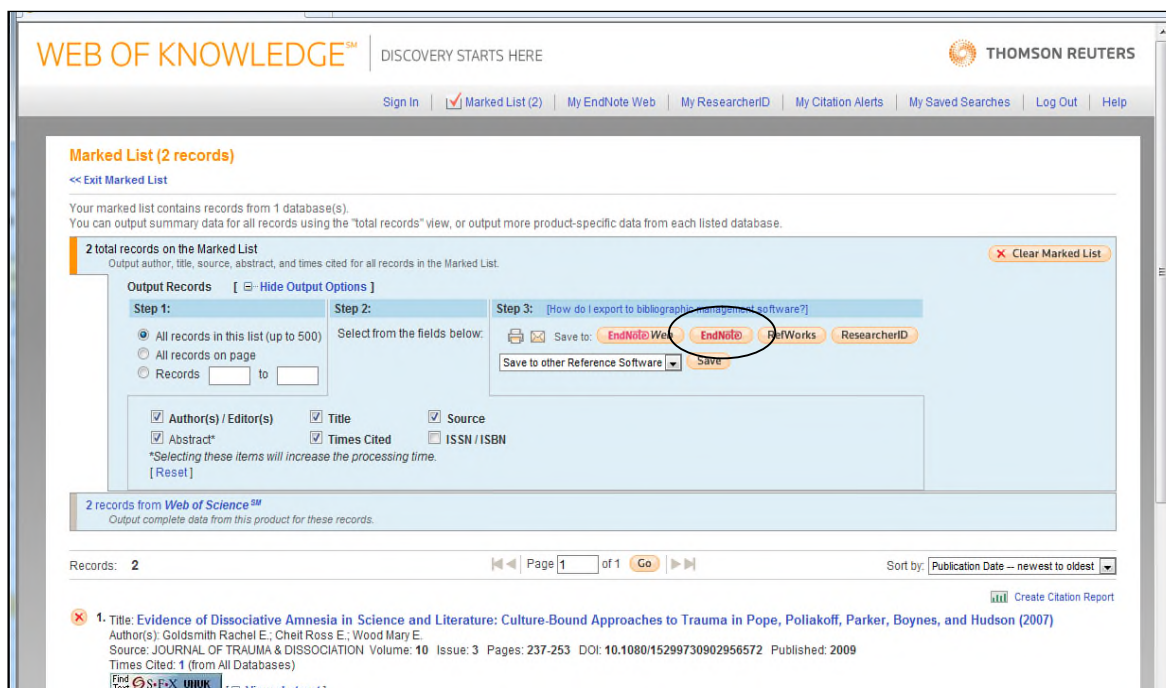
- Conduct a search and mark some relevant references by ticking the **check boxes**
- Click on  to add to your **marked list**
- Click on the **marked list** button at the top of the screen to view the selected references
- Select any extra details e.g. abstract, times cited
- Click on the save to  button

##### Tip: Further help

For more information on searching databases, see the Studying Effectively website at:

<http://www.nottingham.ac.uk/studyingeffectively>





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 the 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.

## 5b: 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 **Library Catalogue** link from the **library** tab in the **portal**.

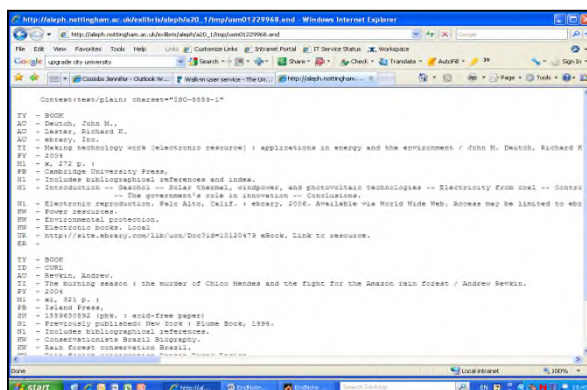
### Step1: Saving references as a text file

- 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.

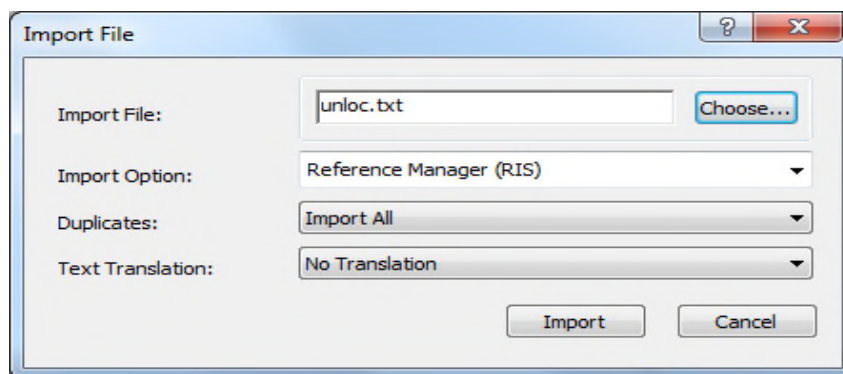
Your references are now displayed in a tagged format for EndNote.



- Click on **the file** menu or on **page**
- 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

- Open your library in EndNote
- From the **file** menu, choose **import > file** or click on the  icon and the following window will appear:



1. Click:
  - **choose file...** to locate and open the text file of references you have just saved
  - Select the file and click **open**
2. 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.
3. 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
4. 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** or **preview** the 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.

## 5c: 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**.

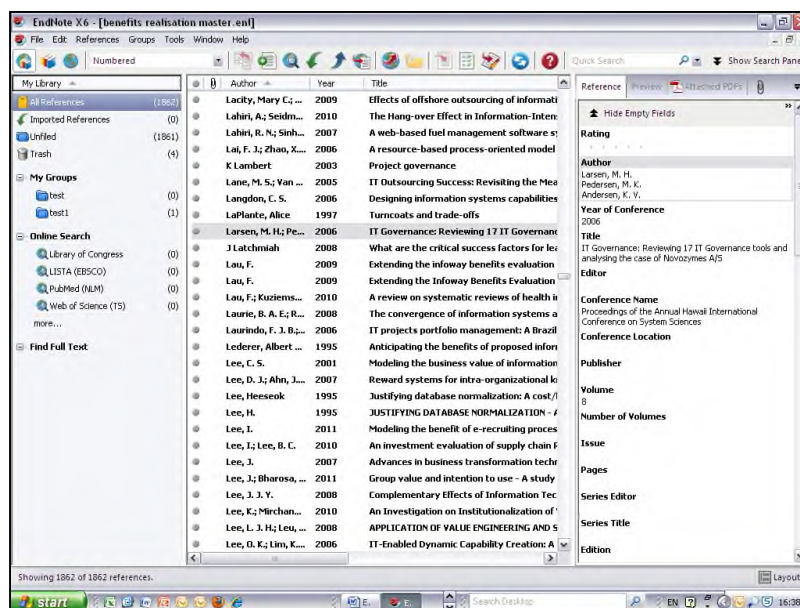
If you can't see the filter you want, click on the option **other filters**.

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.

## Section 6: Managing references

### Displaying references

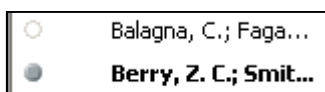
When you open an EndNote Library you see the Library window listing all of the references it contains:



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.

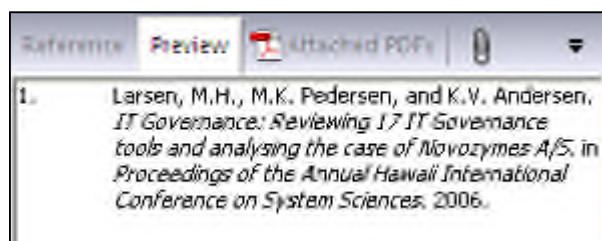
To see more of the title and other columns, use the **scroll bar** at the bottom of the screen, or **resize** the window. The **layout** drop-down menu in the bottom right-hand corner will allow you to change the layout of the screen.

Use the buttons to the left of the author to mark references as **read** or **unread**.



To change the default display (e.g. to include different columns) choose **preferences** and **display fields** from the **edit** menu.

Highlight a particular reference and select the **preview tab** in the right-hand frame to see the full reference in the referencing style selected. To view in a different referencing style, choose from the drop-down menu at the top of the screen.



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.

## Editing a Reference

To work with specific references you must first select them in the Library window.

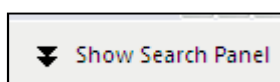
The **reference pane**, which by default appears on the right-hand side of the page, allows you to edit your reference. Click somewhere else on the page and you can choose to **save changes**.

Alternatively, **double-click** on a reference and make any changes. EndNote will prompt you to save any changes made to a reference when the reference window is closed.

Note that you can **hide empty fields** with the button at the top of the window.

## Search for a Set of References

- Click on the **tools** menu and select **search library** to open up the search box.
- Or
- Click the **show search panel** in the top right-hand side of the screen .



The search panel will appear at the top of the screen. You may need to resize your screen to view all of the panel.

- 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 year** 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:

The screenshot shows a search interface with the following elements:

- Buttons: Search, Options
- Search Scope: Search Whole Library (dropdown)
- Match Options: Match Case, Match Words (checkboxes)
- Search Criteria:
  - Keywords: Contains extinction
  - And Year: Is greater than or equal to 1990
  - And Title: Contains
- Buttons: +, - (for adding/removing criteria)

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 remove the search panel, click on **hide search panel** in the top right-hand corner of the screen.

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**.

## Section 7: Linking to and Viewing 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) and enter this into the DOI field.

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:

Either:

- Click on the **paperclip icon** in the right-hand reference pane
- **Browse** for the document.
- Click **open**.

Or:

- Drag and drop the PDF file into the relevant reference.

## 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)

Either

- Click on the **references** option in the top menu



- Choose **find full-text** (twice).

Or

- Click on the find full-text icon  in the top menu bar

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% foolproof

This method uses a variety of ways to locate the full-text from our subscriptions but it is by no means fool-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

- **Select** the reference and in the edit frame on the right-hand side, you should see the **PDF icon**.



- Click on the **PDF icon** to view the PDF within EndNote.

The **layout** button in the bottom right-hand corner allows you to change the display of the PDF to suit your computer's dimensions. You can resize any of the frames to make the area larger.

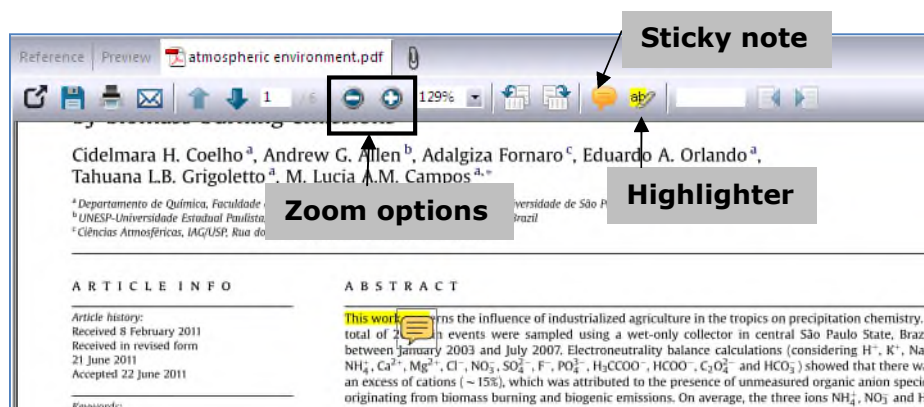



To make the PDF full-screen click on the button.

The buttons along the top of the screen allow you to:

- **Zoom** to enlarge/decrease the text size
- **Highlight** areas of the text
- Add **sticky notes** to add your own comments
- **Search** for terms within the PDF.





If you would prefer to view the PDF in an external package, e.g. Adobe Acrobat, click on the **yellow folder icon**  at the very top of the page.

## Section 8: Creating Groups

### My groups

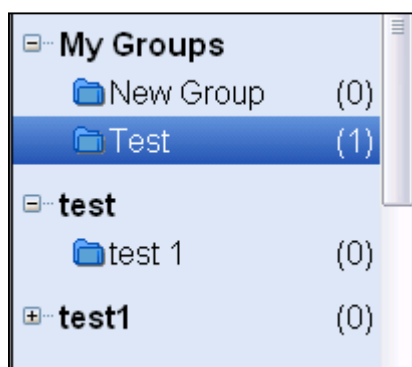
Groups can be created to collate together references on a particular topic.

- Click on the **groups** option on the menu bar
- Select **create group**
- Enter a **name** for your group
- Either, **drag and drop** references from your main library into any of your groups or right-click on the reference and click on **add references to** and select the group.

These grouped 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**
- Enter a **name** for your group set
- Drag and drop any of your individual groups into the group set or use the **right-click add references to** option.



## Create from Group

You can create a new group and amalgamate references that you have within more than one group by using the **groups > create from groups** option.

## Section 9: 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 right-hand pane (remember you can change the layout of the panes by using the **layout** option in the bottom right-hand corner of the screen)

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.

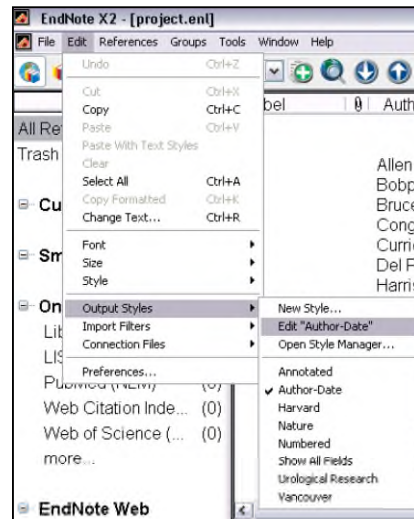
### Selecting favourite styles

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:





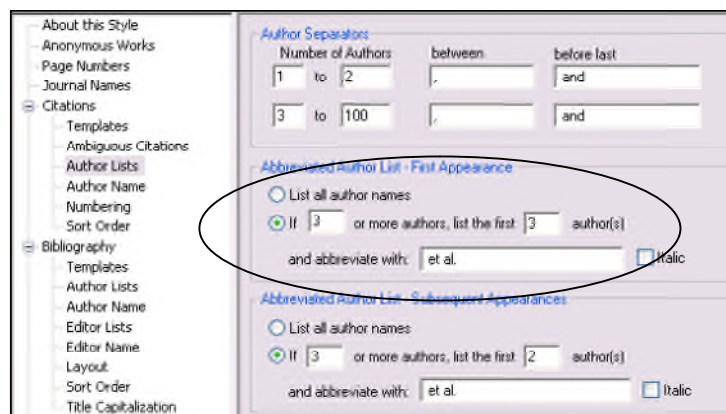
You can then modify how the **in-text citation** will look and how the reference will appear in your **bibliography**.

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.

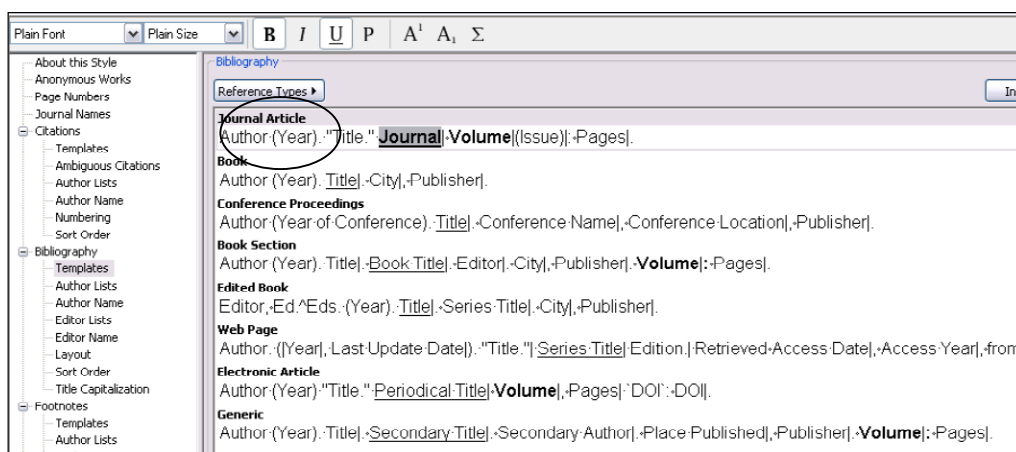


### A bibliography example

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

## 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.
- Either
  - Choose **print** from the **file** menu. A standard print dialog will appear.
  - Click **OK** to begin printing.
- Or
  - Click on **edit > copy formatted**
  - Go to a Word document and **paste**

## Section 10: Using EndNote with Word 2010 and 2007

This section demonstrates the facility which inserts EndNote commands to **Microsoft Word's ribbon** or **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.

### Insert an EndNote Citation into the Paper

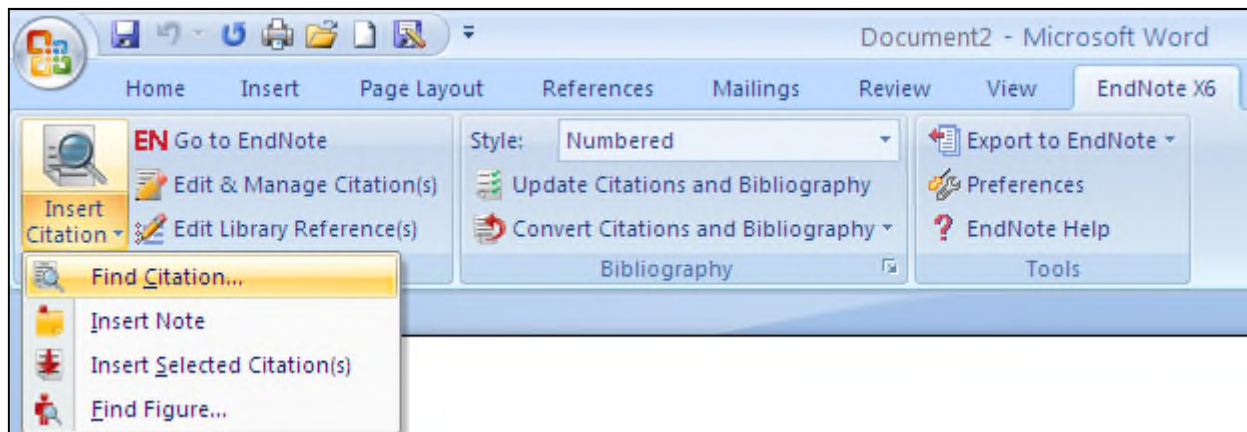
Open Word:

- 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 X6** 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**.



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

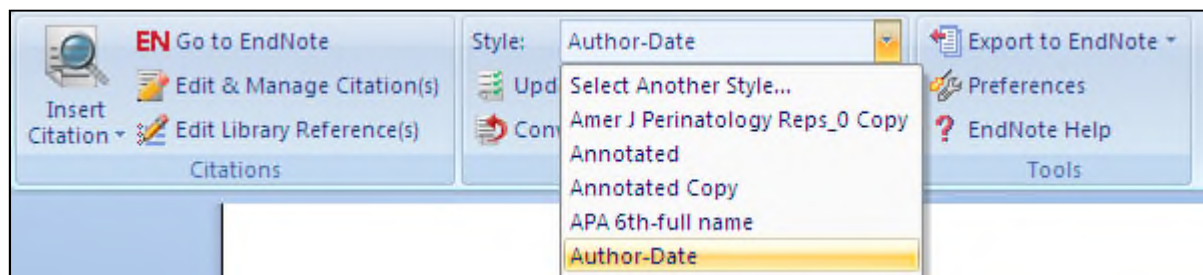
- **Highlight** the appropriate reference then click on **insert**. This will add the reference into the text in Word and begin creating the bibliography.
- Repeat the process until all references have been inserted.

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 **open style manager**
- Click on the **get more on the web** button

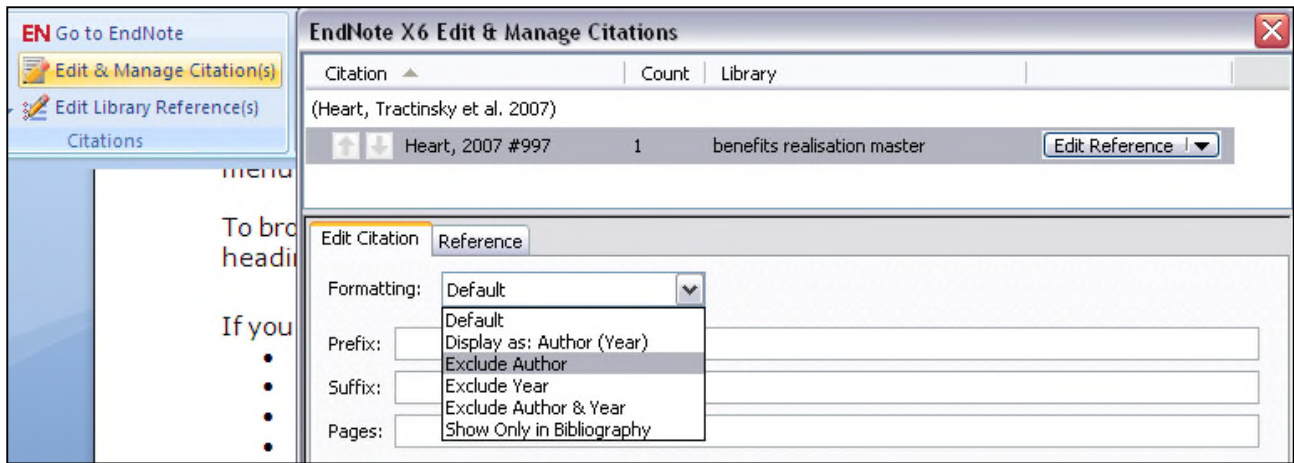
## Editing a citation in the text of your document

Once a citation has been added, it is possible to edit to remove the author, add page numbers etc.

### Removing the author using a Harvard style

- Place your **cursor** on the citation
- Click on **edit & manage citation(s)** from the menu at the top
- Click on the **drop-down menu** next to **formatting**
- Select **exclude author**
- Click on **OK**





Smith (Smith, 2003) argues that... can then be turned into Smith (2003) argues that... Alternatively, you can remove the author at the point of inserting the citation.

- Click on **insert citation**
- **Find the citation**
- **Highlight** the relevant citation
- Click on the drop-down menu beside **insert**
- Select the appropriate option

### 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

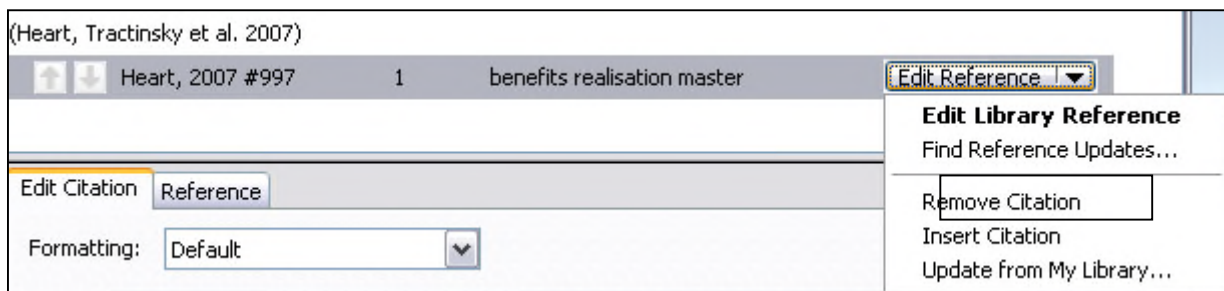
#### Removing citations from the text but leaving in the bibliography

- Place your **cursor** on the citation
- Click on **edit & manage citation(s)** from the menu at the top
- Click on the **drop-down menu** next to **formatting**
- Click on **show only in the bibliography**

#### Removing a citation completely

- Click on **edit & manage citation(s)** from the menu at the top
- Click on the **edit reference** drop-down menu
- Select **remove citation**





## Working with unformatted citations

You can turn instant formatting off if you don't want your bibliography to be created as you go along. When you are ready to create the bibliography you can update your citations at this stage. It is recommended to turn off instant formatting if you are moving between different versions of EndNote. To turn off instant formatting:

- Click on the arrow beside **bibliography** in the middle tab
- Click on the **instant formatting** tab
- Click **turn off**

Once you are ready to create your bibliography, click on **update citations and bibliography** from the middle bibliography tab


## Switching between EndNote and EndNote Web

- In Word 2010 or 2007, to switch between working with EndNote and EndNote Web:
- Click on **preferences** in the third column of the **EndNote** tab
- Choose the **application** tab
- Select **EndNote Web** from the **application** drop-down menu
- **Login** with your email address and EndNote Web password.
- Click on **Go**

## Section 11: Syncing your EndNote and EndNote Web Libraries

You can set your EndNote desktop and EndNote Web library to sync. This means that you can work with both systems.

- To enable sync, you must have the most recent version of EndNote Web available. Click on **edit > preferences > sync**
  - Click on **enable sync**
  - Enter your **EndNote Web username and password** to upgrade to the most recent version of EndNote Web
  - If you do not have an EndNote Web library already set up, you can use the **sign-up** button to create one.

- Click on the **sync** button 
- Enter your **EndNote Web username and password**. The first time you sync a library, you may need to fill in your registration details
- Click on **sync**
- When prompted to create a compressed library backup, choose **yes** and **save**. This will save a backup library for you. However, subsequent syncs will not update this backup. Remember to save a backup copy after making any changes.

You should then find that the same references are found within both your EndNote and EndNote Web library.

#### **Tip: Shared groups**

Shared groups and smart groups cannot be synced as the two systems don't support both of these functions

Your sync status will be shown in the left-hand frame



## **Sync not working**

If the sync does not work, you may need to download a patch onto your computer.

Download the patch at:

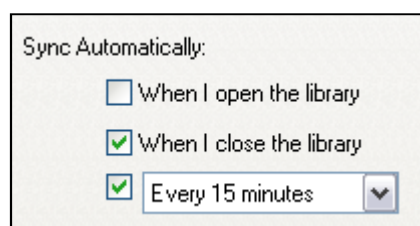
<http://endnote.com/downloads/available-updates>

- Save it somewhere on your PC or desktop
- Right-click and click extract
- (Shut everything else down whilst you're downloading/extracting the file)
- Double click on the extracted file.

## **Setting sync preferences**

You can set preferences to automate the EndNote syncing process:

- Click on **edit** from the main menu
- Click on **preferences**
- Click on **sync**
- Choose how **frequently** you would like EndNote and EndNote Web to sync and click on **apply**.



If you don't want the sync to happen automatically, remove the ticks from **all** of the **tickboxes** and click on **apply**.

**Tip: Sync one library only**

Do not sync more than one desktop library with your EndNote Web library as there is the possibility that it could merge references from different libraries together. It is always recommended to have one EndNote library and use the groups function to manage and organise references.

## Section 12: Exit from EndNote

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

## Section 13: Further Information

For frequently asked questions, see:

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

<http://endnote.com/support/faqs>

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

<http://www.nottingham.ac.uk/studyingeffectively>

- Click on the option for **finding information for assignments**
- Click on the option for **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
CAJ	<b>China Academic Journals</b>	<ul style="list-style-type: none"> <li>Mark reference of interest</li> <li>Click <b>Save</b></li> <li>Select level of detail and click <b>RefWorks</b></li> <li>Click <b>Save</b></li> </ul>	<ul style="list-style-type: none"> <li>Click on <b>Import &gt; File</b></li> <li>Choose the file saved from <b>CAJ</b></li> <li>Select <b>RefWorks</b> import option</li> </ul>
CAS	<b>SciFinder</b>	<ul style="list-style-type: none"> <li>Click on <b>export</b></li> <li>Choose <b>citation export format (*.RIS)</b></li> <li>Click on <b>export</b></li> <li>Click on <b>open</b></li> </ul>	<p>References should be imported automatically into EndNote.</p> <p>The correct filter will be selected automatically.</p>
EBSCO	<ul style="list-style-type: none"> <li><b>Business Source Premier</b></li> <li><b>CINAHL</b></li> <li><b>Historical Abstracts</b></li> </ul>	<ul style="list-style-type: none"> <li>Add references to folder</li> <li>Go to <b>Folder view</b></li> <li>Click on <b>Export</b></li> <li>Select <b>Direct Export in RIS Format</b></li> <li>Click <b>Save</b></li> </ul>	<p>References should be imported automatically into EndNote.</p> <p>The correct filter will be selected automatically.</p>
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><b>Mark</b> references</li> <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,</b></li> </ul>	<p>Correct import filter is selected automatically</p>

		<b>ProCite, EndNote)</b> <ul style="list-style-type: none"> <li>Click on <b>export</b></li> </ul>	
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
Ex Libris	<b>UNLOC (Library Online Catalogue)</b>	<ul style="list-style-type: none"> <li>Click on <b>save/mail selected</b></li> <li>From the save set of records to disk option, choose: <b>reference management format</b></li> <li>Click <b>save</b></li> <li>Click on <b>file</b> and <b>save as</b></li> <li>Enter a filename</li> <li>In the save as type drop-down menu, select <b>text file (*.txt)</b></li> </ul>	<ul style="list-style-type: none"> <li>Click on <b>Import &gt; File</b></li> <li>Choose the file saved from UNLOC</li> <li>Choose the import option: RefMan RIS</li> </ul> <p>Some manual editing required. For example, the author may be added to the title field and the place of publication may not be transferred.</p>
Google	<b>Google Scholar</b>	<p>There are 2 options</p> <p><b>Changing Scholar settings</b></p> <p>Go to <b>Settings</b> on the main Scholar search page</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> <li><b>Save</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><b>Exporting from the publisher page</b></p> <ul style="list-style-type: none"> <li>Click on the <b>title link</b> within your Google Scholar results to go to the publisher homepage.</li> <li>Better export options may then be available.</li> </ul>	<p>Correct import filter is selected automatically</p> <p>Some manual editing may be required. Only the bibliographic details will be imported, but a link back to Google Scholar will be included.</p>
Hein	<b>HeinOnline</b>	<ul style="list-style-type: none"> <li>Below search results, select <b>Save to MyHein bookmarks</b>, then click <b>Save</b></li> <li>Enter a tag to identify this set of results (optional), then click <b>Enter into</b></li> </ul>	Correct import filter is selected automatically

		<p><b>research</b></p> <ul style="list-style-type: none"> <li>Ignore the message about registration that appears; click <b>here</b> (in red – <b>To view your saved bookmarks to date, click here</b>)</li> <li>Click the down arrow next to <b>Options</b>, and select <b>Export to EndNote</b></li> <li>In the <i>File Download</i> pop-up box, click <b>Open</b></li> </ul>	
IEEE/IET	<b>IEEE/IET</b>	<ul style="list-style-type: none"> <li><b>Mark</b> references</li> <li>Click on <b>download citations</b></li> <li>Choose the level of information</li> <li>Choose format: <b>EndNote, Procite, Refman</b></li> <li>Click on <b>download citation</b></li> </ul>	Correct import filter is selected automatically
NLM	<b>PubMed</b>	<p>There are 2 options:</p> <p><b>Searching within the PubMed website</b></p> <ul style="list-style-type: none"> <li>Mark references</li> <li>Click on Send To</li> <li>Choose citation manager</li> <li>Click on create file</li> </ul> <p><b>Searching PubMed from within EndNote</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>	<p>Correct import filter is selected automatically</p> <p>References are automatically deposited in the library.</p>
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</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> </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</p>

	<b>abstracts</b> <ul style="list-style-type: none"> <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 citations</b></li> </ul>	the <b>complete reference</b> rather than just the citation should solve this.)
Proquest	Various indexes including: <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 Education Index</b></li> <li>• <b>British Humanities Index</b></li> <li>• <b>EconLit</b></li> <li>• <b>Environmental Science &amp; Pollution Management</b></li> <li>• <b>ERIC</b></li> <li>• <b>IBSS</b></li> <li>• <b>Medline</b></li> </ul>	You may first need to disable pop up blockers (tools > popup blocker > turn off popup blocker, or, internet options > privacy > untick turn on pop up blocker) <ul style="list-style-type: none"> <li>• Click on <b>export/save</b></li> <li>• Choose the <b>EndNote, Reference Manager of ProCite</b> link</li> <li>• Click <b>continue</b></li> <li>• If a yellow bar appears at the top of the page, click on it and choose <b>download file</b></li> <li>• Click on <b>open</b></li> </ul>	<ul style="list-style-type: none"> <li>• Click on <b>Import &gt; File</b></li> <li>• Choose the file saved from <b>Proquest</b></li> <li>• Choose the import option: <b>Proquest</b></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> </ul>	<ul style="list-style-type: none"> <li>• Mark references</li> <li>• Click on <b>save to EndNote</b> button</li> </ul>	Correct import filter is selected automatically
Westlaw	<b>Westlaw UK</b> <i>(journals search only)</i>	<ul style="list-style-type: none"> <li>• Look for the envelope icon top left; click the down arrow, and select <b>Export to EndNote</b></li> </ul>	Correct import filter is selected automatically