Version X7 for Word 2007 & 2010: PCs
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If you have any queries or feedback about EndNote after this session, please contact:

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1 INTRODUCTION

EndNote is a software package which allows you to store and manage bibliographic references.

EndNote assists with creating bibliographies (or collection of references), making it a very useful tool for writing essays and other academic papers. It works with Microsoft Word.

EndNote allows you to ‘import’ references (or citation information) from the library catalogue and many databases directly into your own EndNote libraries.

2 SETTING UP ENDNOTE

a. Installing EndNote

Unitec has a site licence for EndNote.

Staff

To have EndNote installed on your Unitec staff computer, you should contact Ask IT, or your department’s IT liaison person.

Students

If you would like EndNote installed on your home computer or laptop, there are CD-ROMS and USB’s with the latest version of EndNote available from the Lending Desk at all Unitec Libraries. When you load product into your drive, the installing wizard should automatically open and guide you through the process. If the install wizard does not open go to Start, Run and then browse to find the install folder on your CD Drive.

After installation you will need to copy the APA 6th style that is in the Unitec folder on the disc to C:\Program Files\EndNote X7\Styles. This will replace the existing APA 6th style with the Unitec preferred version.

b. Starting EndNote

EndNote uses the term ‘library’ to refer to a collection of references compiled by you and kept on your own computer.

From the Start menu, choose Programs...EndNote...EndNote Program.

The first time you open EndNote X7, you will see the following screen (see image on next page),

After this EndNote will open with the last library you looked at. You can also create a short cut to your desk top allowing you to open EndNote from there.
c. Creating a new EndNote library

Click on File – New
Select the directory and folder where you want to store the library.
Enter a filename for your library. Note that EndNote will append the extension .ENL to the name you give it.
Click on the Save button.
A window will appear showing the new, as yet empty library.

d. Selecting an EndNote style

Before you write your document, you need to decide which ‘style’ you want your references to be formatted in. A style is a particular format in which you can display your citations. Each department at Unitec has a preferred style; check with your school for the correct one to use for your document.

Choose a different style

In the box at the top of the screen, click the drop-down arrow. Click on Select Another Style. You will see a list of available styles. You can scroll through to find the style you want, or use the Find button to select a style by subject.

You can click ‘Style Preview’ in the drop-down box under ‘Choose’ to preview how a style looks.

Click Choose when you have selected a style.

Your style will now be the default style until you change it.

Click on the drop-down arrow and click on Select Another Style.

Scroll down the list that appears and choose APA 6th.

Click Choose.

(When you open EndNote it will default to the last style used.)
f. Spell checking

You can spell check your reference by clicking on at the top of the reference. You may want to change the preference of the spell check to British English.

From the main EndNote library go to Edit – Preferences

Choose spell check and then options. Use the drop down menu to change to British English.

You can also use the tick boxes to change other options. Click OK to close the Preferences window.

g. Opening an existing library

EndNote X7 will open up with the last library you were using. If you wish to change your library go to File, Open and either choose from the list of libraries displayed or click Open Library and browse for the file you want.

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.
You can browse through the reference library by using the scroll bar, the scroll arrows, or the Page Down, Page Up, Home, End, and Arrow keys.

3 ADDING REFERENCES TO ENDNOTE

To add references to an EndNote library, you can either:

Type the reference information into a new Reference window or Import references that have been downloaded from online databases

a. Creating a new reference manually

- Firstly, make sure the library you want is open on your screen.
- Click on References – New Reference or click on
- A New Reference window opens.
New references always appear as ‘journal articles’ by default, but can be changed to any other type of reference using the **Reference Type** drop-down menu at the top of the Reference window. See image below.

- Enter in the reference information. Be careful here to type the information in the correct format, otherwise your bibliography will be incorrect later.

- Individual author names **must** be entered one per line. Press the [Enter] key after each entry. We recommend that authors names are added in the format, “Last, First Middle” such as Jacobson, Carol Margaret. Remember to add the comma after the surname. EndNote will alter it for the APA format.

- When entering corporate authors, put a comma after the name: New Zealand Department of Conservation, or Fletcher Challenge, or Fisher & Paykel,

- Use the Tab key to move through the fields, or enter Shift+Tab to move backwards. You can also use the mouse to click in the desired field.

- Capitalise names (of people, places, firms etc) as usual. Depending on the style you are using there are different rules on capitalisation. Check the rules for your particular bibliographic style. For example when using APA 6th you should capitalise the first letter of the title and the first letter of any subtitle e.g. EndNote guide: Learning in 5 minute blocks.

- Otherwise do not enter any extra punctuation (such as parentheses around the year) or text styles (such as bold or italic or underlining) into the reference. EndNote will add the necessary punctuation and text style changes to the references when it creates a bibliography.

- Enter all author names for a particular reference. EndNote will truncate the list of authors with "et al" or "and others" as required by the bibliographic style.
- When you are finished you can Ctrl-S to Save or close and you will be prompted.
- Your new reference will now appear in your Library, in alphabetical order. It will have a unique ‘record number’.

b. Selecting and opening a reference

To work with specific references you must first select and open them.

There are several ways you can do this
- Double-click on the reference using the mouse or
- Use the Arrow keys on the keyboard then press Enter or
- Type the first letter of the author’s last name then use the Arrow keys then press Enter.

The Reference window will open to display all of the information associated with the reference. This is where you enter or edit information for a reference.

To view the rest of the reference, use the Tab keys to move forward from one field to the next. Press Shift+Tab to move backwards through the fields, or use the mouse to scroll down through the Reference window.

c. Importing references into EndNote

You can search for references on online databases, and ‘import’ these references into EndNote to save you having to type them in manually. Many databases (e.g., EBSCOHost) will allow you to export the references directly into EndNote.

Information about how specific databases integrate with EndNote can be found on the EndNote help page at http://libguides.unitec.ac.nz/EndNote. Go to the Downloading from Databases tab. There is a list of all the databases that will download to EndNote.

d. Linking to PDF’s and other files

In EndNote X7 you can link any file to your EndNote record, i.e., PDFs, Excel, and Word. To do this you must have the files saved to either your computer, USB stick or disc.

You can:
- Reduce the size of your EndNote program using
- Find your File and then drag and drop it to the correct reference

OR
- Highlight reference you wish to put the file into
Right click and go to **File Attachments, Attach file**
Browse to the file you want and highlight it
Click open

**OR**

If you have PDF’s already stored that contain a **DOI** on the title page of the article, you can import the basic information and the PDF directly into EndNote.

- Open your EndNote library.
- In the toolbar, click FILE then IMPORT. The import dialog box will open.
- Click CHOOSE FILE, and find the PDF file you wish to import, click OPEN.
- Click the IMPORT OPTION dropdown arrow and select PDF.
- Click IMPORT in the dialog box.

The reference metadata should be transferred into the open library and a copy of the PDF is inserted in the record.

EndNote X7 has a Find Full Text function. This will look at the entries in your library and try and find full text copies of the articles. You need to set up EndNote to do this, and it requires changing and setting up preferences.

For more information on this function use the help button in EndNote and search for full text. There are step by step instructions on how to do it.

e. **Searching for a set of references within EndNote**

To generate a list of all references on a particular subject or with particular characteristics, use EndNote’s **Search** function.

- Click on **Search Library**, under the library next to the preview tab. A window will open, with boxes into which you need to type the search parameters.

- Type your search into the first box. Use the drop down menu to change search field if you need to.

Some searches will retrieve more accurate results when the search is restricted to certain fields, for example, searching Keywords will retrieve references only where your search terms have been assigned as important terms.

You can either click on **Search** now, or you can make your search more accurate by adding extra terms into the second and third boxes.

For example, if you wish to narrow your search on ‘king’ to references from 1988, you need to do the following:
- In the drop-down menu underneath ‘And’, select **Date**.
- In the second search box, type **1988**
- Ensure **search whole library** is selected. If you select **Omit from showing references**, what you search for will be **excluded** from the displayed results.

Your window should look like this:

![EndNote X7 library window](image)

Click on the **Search** button to begin the search. EndNote will display your search results.

To go back to the full list of references in the library, select **All References**.

To find out how to create a bibliography or list of your references, see Section 5a.

f. **Groups and group sets**

The group feature of EndNote X7 is visible on the left column of the library window.

In a new library, only the **All References** group is available, which displays all references in your library. **Groups** allow you to select specific references and only have them display while you are working.
To create a new group:
- Right click on My Groups and select Create Group, a group titled New Group is now highlighted for editing.
- Type in the name of the group you wish to create, and then press Enter.
- Click on the All References group to display the entire library again.
- From your list highlight all the references you wish to put into your new group. Drag the selected references to the new group and drop them into it.

To delete a group:
- Right click on the group you wish to delete.
- Select Delete Group
- This will delete the group but will not delete the references from All References.

Create a Group Set which can have groups within it:
- Right click on My Groups and select Create Group Set, a group titled New Group Set is now highlighted for editing.
- Type in the name of the Group Set you wish to create, and then press Enter.
- You can now drag and drop groups that you have already created into the Group Set.

Any item in your library that is not assigned to a group will show in the Unfiled group at the top of My Library column.

4 USING ENDNOTE WITH WORD

a. Using EndNote while writing a document
When writing a document you will need to cite the sources from which you are quoting or referring. If you have already put the information into an EndNote library this is simple to do.

EndNote X7 can work in conjunction with Microsoft Word 2003 and 2007 and Open Office.org Writer 3 to simplify the formatting of your document. You can still use other word-processors in conjunction with EndNote, but cutting and pasting may be necessary. See the EndNote Manual for details. The following instructions are for users of Microsoft Word 2007.

b. Inserting citations into your document from EndNote

Using the ‘cite while you write’ function
- Open your word-processing document.
- Click on the EndNote tab to open the tool bar at the top of the screen.
- Position your cursor at the place you wish to add a citation to. Type a single space to separate the citation from the text.
- Click on the Go to EndNote button EN on your toolbar. This command starts the EndNote program. If you have assigned your library to be the default library, it will automatically open. Otherwise, open it as described in Section 2g.
- Select the citation you want to add into your document.
- Click on or use (ALT and 2)
- You are returned to your word-processing document, with the new citation added. It may take a few seconds to format properly.
- Instant Formatting will format the citation and add the reference to the bibliography at the end of your paper.

Inserting multiple citations
If you want to cite a number of works in one in-text citation:
- Hold down the Shift key and use the mouse to highlight all the references that you want to include.
- Then use the icon to insert the citations.

OR
- Add them one at a time by inserting the first one and then placing the cursor at the end of the intext citation ([Allen, 2004]) and highlighting and inserting the second one.

c. Inserting page numbers into citations

If you are referring to a specific section of a work, you will need to include page numbers in your in-text citation.
- Insert the citation as in Section 4b.
- Select the citation by clicking on it.
- In the EndNote tool bar click A box will pop up.
- In the Pages box add include the page number/s, e.g. 5
- Click OK

It is very important that you do not manually change in-text citations: i.e., do not type anything in, or delete anything, from a citation within the text of your document. Always use the Edit Citation feature.

d. Inserting a secondary source citation

- Insert the citation as in Section 4b.
- Select the citation by clicking on it.
- In the EndNote tool bar click A box will pop up.
- In the ‘Prefix’ box, type ‘as cited in’.
- Your in-text citation will display as (as cited in Walker, 2005)
- Click OK

It is very important that you do not manually change in-text citations: i.e., do not type anything in, or delete anything, from a citation within the text of your document. Always use the Edit Citation feature.

e. Excluding author/year using edit citation

- Insert the citation as in Section 4b.
- Select the citation by clicking on it.
- In the EndNote tool bar click A box will pop up.
- In the ‘Formatting’ box, choose from the drop down menu, e.g. Exclude Author.
- Your in-text citation will display, e.g. Corrall (2010) argued that...
- Click OK
f. Correcting mistakes in EndNote

Once you have put a reference into your Word document you may notice that you have made a mistake. To correct this while in Word, click on the in text citation to access the reference that is wrong. Then click on Edit Library References.

You will be taken to the reference in EndNote where you can make the changes you need. Close the entry as normal. Go back to your Word document and after a few seconds your reference will change to reflect your corrections.

5 OTHER ENDNOTE FUNCTIONS

a. Creating a bibliography independently of your document

- Open your EndNote library
- Ensure the style you want is selected (see Section 2d).
- Either do a search for references on a particular topic, or highlight the references you want to include by using the CTRL key. From the References menu, select Show Selected References.
- Alternatively, you can include your whole library. All references showing in the window will be included.

If your computer is attached to a printer, you can print your bibliography at this stage by clicking on File – Print. Otherwise, you will need to view your bibliography in Microsoft Word.

- Click on Edit – Copy Formatted or use the quick key CTRL and K
- Go to Microsoft Word and click on Paste
b. Saving and sharing a Library

- Open your EndNote Library
- Go to File, Send To and Compressed Library.
- Save the file where you want it to go (Desktop, USB stick etc.)
  This will save your EndNote Library and any files that you have saved within the library.
  You can now email this library to share with colleagues off campus or move between a computer at Unitec and at home.

6 ENDNOTE TROUBLESHOOTING

a. EndNote toolbar does not display in word
Instructions are available here: http://help.thomson.com/default.asp?portalid=tsc&refid=TS_ENCWYWFAQ1

b. My corporate authors do not display properly
When I put in Ministry of Health it appears as Health, M. O.

In the author field in your EndNote library make sure that there is a comma at the end of each corporate author, eg  Ministry of Health, or World Health Organization,

c. I have initials appearing in my citation
When I enter some of my authors, the citation in word appears with the initials, e.g. (M. E. Goldberg and Wurtz, 1972).

This is correct according to APA 6th where you have two authors with the same surname even if the year of publication differs. (See page 176 of Publication manual of the American Psychological Association for more information).

d. My in-text citations are not displaying in the correct format
If your in-text citations look like this {Breslau, 1962 #203} then it means that you have the ‘Instant Formatting’ function of Cite While You Write (CWTW) turned off.

- In Word click on the small arrow to the left of Bibliography on the toolbar or go to Tools / EndNoteX7 / Format Bibliography. Click on the ‘Instant Formatting’ tab, then ‘Enable’ and then ‘OK’.

e. I cannot export from databases using a Mac
There have been instances reported where if you are using Safari or IE as your search engine on a Mac, the search results will not import into EndNote. Try using Mozilla Firefox as your search engine. This program can be downloaded free from the internet.
f. My Word document suddenly contains weird characters and field codes
In text citations now look like this and my bibliography has disappeared.
{ADDIN EN.CITE<EndNote><Cite><Author><Year><1992>
<RecNum><6><Rec Num><record><rec-number><6</rec-number>foriegnkeys><keyen=EN...

You have turned on the field codes in your documents.
Hit the **Alt and F9 keys** and the Field Codes will disappear and the document returns to normal.

g. My reference list/bibliography is not displaying in the correct font

In Word go to the EndNote Tab and click on the arrow at the side of Bibliography

The following box will appear. Click on the Layout tab.

![EndNote X1 Format Bibliography](image)

Change the font and size to the one you require.

![EndNote X1 Format Bibliography](image)

Your word documents will then be reformatted.
APA AND ENDNOTE

APA is a complicated style and EndNote requires some manipulation to get the APA references to appear correctly, particularly when it comes to Electronic material. Below are some guidelines on how to get the APA format correct.

a. Electronic journal articles

*Article with a DOI*

Use the Journal Article or Electronic Article reference type.

If there is a DOI (Digital object identifier) you need to use this. If downloading from a database the DOI may download into the wrong field. If it does you need to cut and paste it into the DOI field. Only copy the number string as EndNote will add doi to your reference.

There is no need to put in a retrieved date.

*Article with no DOI*

Use the Electronic Article reference type.

If you are citing an electronic journal article that is from a Web-only journal, or from a website that does not have a DOI, you need to add the web address of the home page of the journal to the URL field. This will automatically generate the required retrieval note.

If the article comes from a database and does not have a DOI you will have to search for the website of the publisher of that article and use the homepage of the journal in the URL field.

b. Electronic books

*Authored Books*

Electronic books with authors use the Electronic Book reference type. If the item has a DOI put it in the DOI field. If it is taken from the web put the web address of the book. If it has come from a Library database put the main web address of the database.

*Edited book*

Electronic books with editors use Edited Book as the reference type. If the item has a DOI put it in the DOI field. If it is taken from the web put the web address of the book. If it has come from a Library database put the main web address of the database.

*Book Chapters*

Electronic chapter of books use Electronic Book Section as the reference type. If the item has a DOI put it in the DOI field. If it is taken from the web put the web address of the book. If it has come from a Library database put the main web address of the database.
c. Conference proceedings

Article published in an edited book (this is the most commonly cited type of conference paper): use Book Section reference type.


Articles published in a journal or journal supplement: use Journal Article reference type.

d. Blogs

Use the Blog reference type but remember to put the medium type, ie Web log message or Online Forum Comment into the Description field.

e. Press releases

Most Press releases are obtained in an electronic format. Use Web Page as the reference type. Under Type of Medium field enter Press Release and also fill in the day of the press release in the last Update Date field ie, October 13.

f. Personal communications

Phone calls, letters and emails should not be included in the final reference list according to APA guidelines. Cite them only in the text itself in parenthesis. (See page 179 of Publication manual of the American Psychological Association 6th ed., for more information).

g. Inserting an author suffix

If an author has a suffix such as Junior or III after their surname APA requires this information to be included in the reference

To get this to display in EndNote insert the authors name as follows

Surname, Initials., Jr. or Surname, Initials., III. (Remember to put in the punctuation as in the example.

Wilson, P. R., Jr. OR Smith, Alan E., III.
8 NEED HELP?

If you need more information about EndNote please refer to the EndNote help material here:

http://endnote.com/support/online-user-manual/x7
https://www.youtube.com/user/EndNoteTraining
http://endnote.com/support/faqs

Or contact the Unitec Library here:

Mt Albert Main Library
libinfo@unitec.ac.nz