The University Library
EndNote Desktop: Quick Start Guide

For further information, including more detailed handouts and workbooks, please see http://libguides.ncl.ac.uk/endnote

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1. GETTING STARTED WITH ENDNOTE

OVERVIEW

In this task you will learn how to open EndNote and create your first EndNote library.

An EndNote library is where your references are stored. It is a single file which you save on your own filesystem – it has an .enl file extension (e.g. endnotelibrary.enl). It is possible to create several EndNote libraries if you wish, however, we recommend creating one EndNote library and using the Groups feature (see the task on Using Groups) to organise your references by topic/module/assignment or other criteria. This will allow you to synchronise your desktop EndNote library with EndNote online should you wish to in the future.

CREATING A NEW ENDNOTE LIBRARY ON a cluster PC

STEP 1

Click on Start > All Programs > Database Software > EndNote program

You may see a pop-up warning when running EndNote (depending on your web browser). It is a safe program authorised for use on campus, so allow it to run.

If you are working in Windows 8 there is no Start button, you can summon the Start screen any of these ways:

Mouse: Point your mouse in the screen’s bottom-left corner and then click when the Start icon appears.

Keyboard: Press the Windows key.

You should then see the Start screen, bringing a screen full of tiles representing many of the available apps and programs.

If you can’t see the EndNote program Press the Windows Key + X and select Search

N.B. To go back to the old version of the desktop press Windows key + D on your keyboard.

STEP 2

The first time you use EndNote you may see a screen inviting you to sign up to EndNote online or synchronise your library.

(if required this can be done at a later date)

There may also be other ‘pop up’ boxes.

Close these boxes using the cross in the top right corner of the pop up or by selecting ‘ignore this’.
STEP 3

If this is the first time you have used EndNote, you will need to **create a new library or open an existing library**.

Click on File, then New to create a new library.

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STEP 4

A new window will appear called **New Reference Library**.

Navigate to your own file space (your H:/ drive) and locate or create a suitable folder in which to save your library.

In the **File name** box call the new library: *(Your Name)*'s Library (default).

Ensure the **Save as type** box is displaying: **EndNote library (*.enl)**.

Click on **Save**.
STEP 5  Your new EndNote library will then open – you currently have no references to display.

When you create an EndNote Library (.enl file), the process will also create a folder (called, for example, test.Data). This is what EndNote uses if you attach images or other files to references. Make sure that your .enl file and data file are always saved in the same location.

OPENING YOUR EXISTING ENDNOTE LIBRARY

Your EndNote library will be securely saved in your own network space or H:/ drive.

If you have the EndNote shortcut saved to your desktop, start menu or taskbar, click on this icon.

To open the library simply find your H:/drive and look for the EndNote icon (see example below (My EndNote Library)).

Double click on the EndNote icon to open your library.
GETTING TO KNOW YOUR ENDNOTE LIBRARY

Note that your EndNote library has the following features:

**Groups pane** – you can create groups to organise your references or EndNote will sometimes create temporary ‘autogroups’ for example when importing references or working with a Word document.

**Reference pane** – your references will be listed here and can be sorted using the headings at the top. These headings can be reordered by dragging and dropping or changed by right-clicking on the headings and ticking/unticking fields.

**Tab pane** – this has several options. Notice you can alter the layout and show/hide panes using the Layout button at the bottom of the screen.

**Display modes** – these allow you to switch between working with only your local EndNote library, with your library and online databases, or with databases alone.

**Referencing style** – you can choose which style you want by clicking here and choosing ‘Select another style’. Search using a keyword or scroll down, click on your required style, then select ‘choose’.

It is possible to **resize your library window** using the maximize / minimize buttons in the top-right or using the resize handle in the bottom-left – hold your mouse over it until your cursor becomes a double-sided arrow, then simply drag to resize.
2. ADDING REFERENCES

OVERVIEW

In this task you will learn how to create an EndNote reference by hand.

It is useful to know how to create references by hand to add those resources you may already have collected. However, the easiest way to create EndNote references is to import them from the Library catalogue or a journal database.

OPENING A NEW REFERENCE TEMPLATE

STEP 1

From the menu across the top of your library, click on the New Reference icon.

STEP 2

This will open a New Reference window.

Notice that Journal Article is chosen as the Reference Type by default.

You don’t need to enter information into every field in the reference template, but you must fill in the first few fields which describe the key bibliographic information.

ENTERING BIBLIOGRAPHIC INFORMATION

STEP 3

Start by entering details of the article authors [you can use the examples below or use your own examples]. Note that each author’s name must be added on a new line. Take care that the spaces, punctuation and upper and lower case go in as described.

- Type in the first author: Lillis, T and press enter/return
- Type in the second author: Turner, J

Now enter further information - press the TAB key to move between fields:

- Type in the year: 2001
- Type in the title: Student writing in Higher Education
- In the journal field type: Teaching in Higher Education
- In the volume field type: 6
- In the issue field type: 1
- In the pages field type: 57-68
STEP 4

You reference will now look like this

To save the reference, click on **File > Close Reference** – this will close the reference and the changes you make will be saved automatically. (You can also use the cross in the top-right to close the reference, but be careful to close only the reference and not EndNote!)

If you see a pop-up window at this

The first time you save a reference you may see a pop-up window asking if you want to save the changes.

Tick **Do not display the message** again and then click **Yes**.

From now on, your changes will be saved automatically whenever you close a reference.

**ADDING DIFFERENT REFERENCE TYPES**

STEP 5

Click on **CTRL** and **N** (this is a shortcut) to bring up a blank **New Reference** window.

From the **Reference Type** menu, select **Web Page**.

Notice that the fields in the reference have changed – these are dependent on the type of reference you select.

STEP 6

Enter the following information: and then close your reference to save it:

- **Author:** National Institutes of Health,
- **Year:** 2011
- **Title:** Stem cell information: the National Institutes of Health resource for stem cell research
- **Publisher:** National Institutes of Health
- **Access year:** 2011
- **Access date:** 15 September
- **Last update date:** 31 August 2011
- **URL:** http://stemcells.nih.gov/index.asp

Note that a corporate author requires a comma entering after the name (e.g. **Author: National Institutes of Health**). Otherwise EndNote will format the author’s name into last name/initials format (**Author: Health, N.I.o**).
ADDINNG KEYSWORDS AND NOTES

STEP 7

KEYWORDS
This function allows you to put comments or keywords into references so that you can search for them by criteria that suit your needs. You must separate each keyword by a comma. The keywords will not appear in references when you export them as footnotes or bibliographies.

- Double-click on the Stem Cell Information reference to open the reference
- In the Keywords field, type NIH, stem cells, research on separate lines and close the reference
- Go to Tools and Search Library...
- At the Search box, change Author to Keywords using the drop down menu
- Type research in the search box and click on Search

Click on Hide Search Panel on the right of the Toolbar to return to your default screen.

NOTES
Use the Research Notes field to store personal reminders, such as the location of a quotation in a book or the quotation itself.
3. EXPORTING REFERENCES FROM LIBRARY SEARCH
(Recommended for books, eBooks and titles found in ‘everything except articles’ search option)

STEP 1

- Go to Library Search (http://libsearch.ncl.ac.uk/)
- In the search box, type in keywords from the book title and/or author name.
- Click Search. You should see a list of results (see below)

Click on the title of the book that you wish to export to EndNote.

STEP 2

On the right hand side of the page, click on ‘Actions’. You will see a drop down menu. Click ‘EndNote RIS’. 
STEP 3

A small window will open up in your browser (Push to RIS or Import to Citation Manager). Click on ‘OK’.

You will then see options for opening the file (it will look different depending on which browser you use – see table below)

<table>
<thead>
<tr>
<th>Google Chrome – maximise your browser, click on the ris file at the bottom of the browser window to open</th>
<th>Firefox – click ‘OK’</th>
<th>Internet Explorer - Click ‘Open’</th>
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<tr>
<td><img src="image1.png" alt="Google Chrome" /></td>
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<td><img src="image3.png" alt="Internet Explorer" /></td>
</tr>
</tbody>
</table>

STEP 4

You may be asked to choose a destination. Click OK to choose EndNote as your destination. You should then see the reference in your EndNote library.

You may be prompted to select an import filter. If so, choose the Reference Manager (RefManRIS) Import option and select Import. You should then see the imported reference in your EndNote library.

Please note: when exporting from Library Search, please always check that the reference has imported correctly as occasionally eBooks may be imported as ‘Generic’ resource types and author names occasionally import into the ‘Editors’ field in EndNote.
4: INSERTING CITATIONS IN WORD

OVERVIEW

EndNote and Word can be used together to create in-text citations and bibliographies in your documents. This uses EndNote’s Cite While You Write feature. This task will give you an introduction to this feature. You will need to open both Word and EndNote in order for them to work together. This task is written for Word 2013.

OPENING WORD

STEP 1  
Click on the Start menu and select All programs > Microsoft Office > Microsoft Word.

Notice you have an EndNote tab in the ribbon at the top of the screen:

Please note that if the EndNote tab isn’t appearing, then do the following: From the start menu, select Start > All Programs > Database Software > Endnote X7 > Configure EndNote. Then, in the box that opens, click ‘Next’, ‘Next’, ‘Finish’. Then restart Word.

CREATING A DOCUMENT AND INSERTING CITATIONS

STEP 2  
In your blank Word document type:

It has been argued by many thinkers that planning is essential when writing an essay.

Ensure your cursor is at the end of the sentence before the full stop – this is where the in-text citation will go.

On the EndNote toolbar, click the drop-down menu next to the Style box and click Select another style. From the EndNote Styles box, select Harvard at Newcastle, or your own required style. Click OK.

Now, from the EndNote ribbon click on EN Go to EndNote.

This will take you to EndNote and create a working link between your Word and EndNote files.
Click on a reference in your EndNote library to highlight it.

Then click on the curved red arrow **Insert Citation** icon in the toolbar.

Your in-text citation is automatically inserted into your Word document and a reference list created at the end. Add some more text to your document and try adding some more citations to see how the reference list grows.

Notice that **EndNote automatically creates a Group for your document as you write**. This is a temporary group which disappears when you close Word.

**CHANGING THE STYLE**

**STEP 3** On the EndNote ribbon, click on the down arrow in the box next to **Style**. Click on **Select Another Style** to see the full list of styles available. Choose one and click **OK**.

Note how the in-text citations and the references change instantly to reflect your new style.
EDITING CITATIONS

STEP 4

You can amend individual citations in your text, for example to add page numbers or to exclude the author or year.

- Place the cursor in the text on the citation you wish to amend
- Click on **Edit and Manage Citations** in the Endnote ribbon in Word
- On the **Edit Citation** tab, select from the **Formatting** drop-down menu to exclude the author or year
- In the **Suffix** box type: *p87*
- Click **OK**

You can also delete citations using this function **Edit and Manage Citations**, under **Edit reference**, select **Remove citation**

EDITING THE FULL REFERENCE IN A BIBLIOGRAPHY

STEP 5

If you need to amend a reference, for example if you have made a mistake when entering it into EndNote, it is possible to do this from within Word, so that your document will instantly reflect the changes.

- Place the cursor in the text on the citation for the reference you wish to amend
- Click on **Edit Library Reference** in the EndNote ribbon in Word
- In the EndNote Reference window make your amendments (e.g. change the date in the Year field)
- Close the reference and **Save** the changes
- Go back to your Word document and note that the changes have been made. You may need to wait a moment for the change to take effect – if it does not update click **Update Citations and Bibliography**
5: EXPORTING REFERENCES FROM DATABASES

OVERVIEW

You can search many online databases and import your search results into EndNote. This task takes you through two examples.

Although it is possible to connect to some online databases from within EndNote (see links in the left hand pane) we do not recommend that you do this. You will get better results by searching the online databases through their own interfaces and then downloading the results into EndNote.

IMPORTING FROM WEB OF SCIENCE

STEP 1

ACCESSING WEB OF SCIENCE (also known as Web of Knowledge)

- Go to your web browser and access the Library home page at: http://www.ncl.ac.uk/library
- In the Library Search box type Web of Science and click search
- Locate the database in your results list and click on View online > Open source in a new window to connect

STEP 2

SELECTING RECORDS

- In the Web of Science search box type: "essay writing"
- Click on search
- In your results list, mark some of the records by placing a tick in the box at the left of each record

STEP 3

IMPORTING INTO ENDNOTE

- From the menu at the top of the results, select to Save to EndNote desktop
- Then select to send the Author, Title, Source and Abstract. Click Send.
STEP 4

The references will automatically be added to your open library.

The My Library pane indicates how many records you have downloaded – these are listed under Imported References.

IMPORTING FROM SCOPUS

STEP 5

SELECTING RECORDS

- Go to the Library homepage [http://www.ncl.ac.uk/library/](http://www.ncl.ac.uk/library/)
- In the Library Search box type Scopus and click on the search icon
- Locate the database in your results list and click on View online > Open source in a new window to connect
- In the Scopus search box type "essay writing"
- Click on Search
- Mark some of the records by ticking the checkboxes

IMPORTING INTO ENDNOTE

From the top of the page click on the Export icon

- You will then see the Output page:
- Choose RIS format
- Use the drop down arrow next to Output to select All available information.
- Then click on the Export button
- A File Download window will appear - click on Open
- Allow any pop up blockers. The references will be automatically added to your open library
- The My Library pane shows how many references you have in total and how many references you have just imported.
6. ABOUT ENDNOTE

WHERE CAN I ACCESS ENDNOTE?

All the PC clusters in the University. EndNote can be installed on any freestanding University-owned machine

EndNote is available via the Remote Application Server (RAS) http://ras.ncl.ac.uk/

You can buy a personal copy of the latest version of EndNote from Bilaney Consultants: http://www.bilaney-consultants.co.uk/our-products/endnote.html

GETTING HELP

Lots of FAQs and tips available on the EndNote Library Guide:
http://libguides.ncl.ac.uk/endnote

Email helplines:
libraryhelp@ncl.ac.uk (HaSS and SAgE)
mediaison@ncl.ac.uk (FMS)

EndNote Workshops (Semester 1): for a guided introduction to using EndNote. See http://libguides.ncl.ac.uk/endnote for further details.