

# Endnote Basics

1. Introduction
2. Opening the EndNote program
3. Manual input of records
4. Changing reference styles in EndNote
5. Exporting records from databases to EndNote
6. Groups
7. Using EndNote with Word 2010 and Word 2013
8. Conclusion and further help

## 1. Introduction

This is a beginner's guide that covers the basics of the EndNote program. The guide assumes that you have a basic knowledge of referencing and the reference style that you want to use.


By following the instructions in this guide you will be able to:

- Create an EndNote library.
- Add records to an EndNote library - manually and via a library database.
- Change referencing styles.
- Use EndNote with Word.
- Know how to get further help with EndNote.

## 2. Opening the EndNote program

- EndNote is already loaded on EIT computers.
- **Start > All Programs > EndNote > EndNote Program.**
- Create an EndNote Library. Go to File > New. Name and save the library.

## 3. Manually input records

1.	Open your saved EndNote Library or create a new library ( <b>File &gt; New</b> ) and save it.
2.	Create a new reference by clicking on this button  or go to <b>References &gt; New Reference</b> or enter <b>Ctrl+N</b> .
3.	In the <b>Reference Type</b> drop-down box select the correct template for the reference type you would like to enter e.g., journal article, book, web page (it is set to Journal Article by default).
4.	Manually enter the details into the relevant fields. Click on small x to close (if a pop-up asks you if you want to save, tick the box saying "Don't show me this again", and click Save. The next time it will automatically save).
5.	Repeat for another reference.



Want more information?

974 8000 ext 6045

twist@eit.ac.nz



EASTERN INSTITUTE OF TECHNOLOGY  
TE AHO A MĀUI

**TIPS**

- Enter authors consistently.
- List author last name (family/surname) first and follow with a comma and initials.
- Organisation's names should be entered in full and followed with a comma.
- Enter each author name on a separate line.
- Put a space between author initials.
- Use sentence case for journal article titles.
- Enter some keywords in the Keywords field for searching later.

**4. Changing reference styles in EndNote**

- Reference styles can be changed in EndNote **AND** in your Word document (see 7.6 below).
- In EndNote, from the style drop-down menu, click **Select Another Style**, select the style you want to use, e.g. APA 6th or Vancouver, and click **Choose** to add it.
- Other styles not in the EndNote list can be downloaded via **Edit > Output styles > Open Style Manager** then click on **Get More on the Web**.
- If using APA 6th choose the APA 6th EITX7 reference style (this is a version of APA 6th that has been modified to work better with EndNote here at EIT).

**5. Direct Export of records from Databases**

Many online databases give you the ability to export references to your EndNote library. Look for the option to save, export, or send citations to EndNote. The EndNote option might also be labelled as "RIS". Try the following searches to see how the export function works:

Ensure your EndNote Library is open.

Choose EITHER **Science Direct** OR **ProQuest** example

SCIENCE DIRECT	ProQUEST
1. From the library homepage, select: <b>Library Databases &gt;&gt;Alphabetical&gt;&gt;Science Direct Health and Life Sciences Journal Collection</b>	1. From the library homepage, select: <b>Library Databases&gt;&gt;Quick Links&gt;&gt;ProQuest</b>
2. Do a search on " <b>cochlear implants</b> ".	2. Do a search on " <b>global financial crisis</b> ".
3. Mark a few records and select <b>Export</b> .	3. Select items by ticking the checkbox next to each article.
4. Keep <b>Export format</b> as <b>RIS format (for Reference Manager, ProCite, EndNote)</b> selected.	4. Click <b>Export/Save</b> .
5. Click <b>Export</b> .	5. Select <b>EndNote, Citavi</b> or <b>Reference Manager</b> , click <b>Continue</b> .
6. Click <b>Open</b> on the File Download window.	6. Click <b>Open</b> on the File Download window.
7. In the EndNote sidebar, click <b>All References</b> to see all your references.	7. In the EndNote sidebar, click <b>All References</b> to see all your references.

## 6. Sorting references within groups

Groups make it easy to break a large library into subsets. A group simply points to a subset of references that already exist in the library. The same reference can appear in multiple groups and is not duplicated when you do this. If you delete a reference from a group it is not deleted from the library, only from that group.

- Create a custom Group. Right click on My Groups or from the menu Groups > Create Group and name it after one of your topics. Drag and drop references from your library into this group.
- Create a new Smart Group. Right click on 'My Groups' or from the menu Groups > Create Smart Group and name it after one of your topics. Set up a keyword search from your topic - this creates a group that will automatically add references if they have the word describing your topic in the citation.

## 7. Using EndNote with Word 2010 and Word 2013

1. To insert a reference open the Word document and position the cursor at the location where you would like the citation.

- Click on the EndNote X7 tab on the toolbar.
- From the EndNote tab in Word, click the down arrow beside the Insert Citation button.
- Select **Find Citation** and enter text (e.g. author surname), click **Find** and EndNote will list matching results.
- Select the reference(s) you require and click **Insert**. The reference(s) will be inserted into the text of the Word document and a Reference List will be created at the end of the document.

2. Alternatively, select a citation in EndNote to insert in Word.

In EndNote, click to highlight a reference.

- Go to the Word document, place cursor where you want the in-text reference to appear, click the down arrow beside **Insert Citation** button. Select **Insert Selected Citation(s)**.

3. Editing citations in Word.

In Word, place cursor on in-text citation.

- Click on **Edit & Manage Citation(s)** in EndNote toolbar.
- Enter a page number. Note: Page numbers will only appear if the Style allows it. e.g. APA.
- Practise excluding author or year (Select these options from the drop-down menu).

4. Changing styles in Word.

In Word, click the **Style** dropdown in the EndNote tab and select another style.

- If any references in EndNote are edited, changes you make won't correct citations already in your Word document until you format the Bibliography. Click on **Update Citations and Bibliography**.
- In this case, you are not changing the style, you are just refreshing the Word document to reflect editing changes in EndNote.



Want more information?

974 8000 ext 6045

twist@eit.ac.nz



EASTERN INSTITUTE OF TECHNOLOGY  
TE AHO A MĀUI

**Important Note:** Do not remove or delete a reference in Word using the delete key. Do the following:

- Place cursor in citation
- Right click > **Edit Citation(s)** > **More...**
- Select/highlight citation in list to remove/delete
- In the **Edit Reference** dropdown window, select: **Remove Citation**

## 8. Conclusion and further help

- Remember to keep a backup of the EndNote library if on a USB as USB drives can fail or be lost (**File > Save a Copy**).
- EndNote Help is available on the EndNote tab in Word and the Menu bar in EndNote.
- The EndNote website (<http://endnote.com>) has FAQs and Forum for further help.
- Contact the library for assistance.



Want more information?

974 8000 ext 6045

[twist@eit.ac.nz](mailto:twist@eit.ac.nz)



EASTERN INSTITUTE OF TECHNOLOGY  
TE AHO A MĀUI