

EndNote® X8 Workbook

Getting started with EndNote for desktop.

More information available at:

<https://www.brad.ac.uk/library/find-out-about/endnote/>

Contents

About EndNote X8	1
Getting started	1
Adding references to your library	1
1. Summon™	1
2. Proquest® databases (ABI/Inform, ASSIA, IBSS etc.)	2
3. Ebsco databases (CINAHL, PsycInfo etc.)	2
4. Web of Science®	2
5. Google Scholar™ (https://scholar.google.co.uk)	2
6. Capturing data from the web using the Internet Explorer bookmarklet	2
7. Export references from other databases to EndNote	2
Research Notes.....	3
Importing a folder of PDF files into your EndNote Library.....	3
Adding references manually	3
Groups	4
Inserting Files, URLs and Graphics into your EndNote Library.....	4
Searching for fulltext PDFs online	5
Updating your references using “Find Reference Updates...”	5
Create your bibliography with EndNote: Cite while you Write	6
Finding and Inserting Citations as you write your essay.....	6
Editing your citations: Direct Quotations – inserting cited pages information	6
Format / Reformat your Bibliography.....	7
Converting to plain text.....	7
If you’ve previously used Zotero or Mendeley or other bibliographic software.....	7
Using EndNote X8 off campus.....	7
Comparison of EndNote X8 and EndNote Online.....	8
EndNote X8	8
EndNote Online	8

About EndNote X8

EndNote X8 is a bibliographic tool, helping you to keep track of the books, journals and other sources that you have used, and want to cite in your work. EndNote automatically creates bibliographies for your essays, theses and dissertations, in a variety of bibliographic styles.

This workbook takes you through adding references, formatting your bibliography, and managing your library of PDF files.

EndNote support: <https://www.brad.ac.uk/library/find-out-about/endnote/> .

Further help is available: <https://endnote.com/support> .

Getting started

You need to save all of your references in a file called an EndNote Library.

1. Open the EndNote program: Click on the **Start** button, then select **Programs, EndNote, EndNote Program** (on UoB cluster PCs the EndNote program is often within the MSOffice suite of programmes, on research student and staff machines it is within UoB Apps).
2. Choose **Create a new EndNote Library** and click on **OK**, select whatever location you want to save the file to (i.e. central file storage or memory stick *don't use cloud storage like dropbox to save your EndNote library – we have had some reports of problems*).
3. For now, it is a good idea to use the same EndNote Library for all of your research, if you need to separate your work you can divide into **groups**.
4. Once you have an EndNote library you can **Open** it either by going to the file directly or by opening EndNote and selecting **File > Open**.

Adding references to your library

The best way to populate your EndNote library is to import from databases. Details for the most commonly used databases are below.

It is always a good idea to check references you import for accuracy. You may need to edit some of your records.

1. SummonTM

- a. From your search results add results to a temporary folder.
- b. Go to your folder. Click on the **Export** dropdown list, and select **EndNote**.

- c. The results should be transferred.

2. Proquest® databases (ABI/Inform, ASSIA, IBSS etc.)

- a. Select references using the checkbox next to each item.
- b. Select **Export** and **EndNote**.
- c. Your references should transfer.

3. Ebsco databases (CINAHL, PsycInfo etc.)

- a. Add references to a folder using the **Add to folder** link by each reference.
- b. Go to your folder view and select **Export**.
- c. Select **EndNote** export from the list.

4. Web of Science®

- a. Do a search as normal in Web of Science and add references you wish to transfer to a **marked list**.
- b. Go to the Marked List in Web of Science.
- c. Choose the option **Save to EndNote**.

5. Google Scholar™ (<https://scholar.google.co.uk>)

- a. From the Google Scholar search results click on the quotation marks  underneath each result.
- b. At the bottom of the formatted reference, click **RefMan**.
- c. Note: Results from Google Scholar can only be saved one at a time, and the quality of the records is often poor.

6. Capturing data from the web using the Internet Explorer bookmarklet

- a. If you have also installed **EndNote Online** you should be able to use the **capture** bookmarklet from Internet Explorer or Firefox browser to pull in details of webpages or content of the sites (if they have an API).
- b. When you click on the bookmarklet select **EndNote** rather than EndNote Online. The quality of the data is dependent on the metadata on the webpage.

7. Export references from other databases to EndNote

Most databases have an EndNote export option. Look for **Export** options, and “Export to reference management software”, select either an **EndNote**

or RefManRIS format. More information is available at:
<https://www.brad.ac.uk/library/find-out-about/endnote/> .

Research Notes

Each record you import will have a Research Notes field towards the bottom. You can use this to add notes from your reading of the items in your library. This field (along with all the others) is searchable when you come to add references to your Word document. It is particularly useful for tagging records if undertaking a systematic review.

Importing a folder of PDF files into your EndNote Library

Use this if you have a folder of PDFs from your research already, and want to quickly add them to EndNote.

EndNote will import a folder of PDFs into your EndNote library and where the PDF file has appropriate metadata it will attempt to organise this into a reference.

In EndNote go to **File > Import > Folder...** choose the folder you want to import from.

You can set preferences for how it handles or renames these PDF files in **Edit > Preferences > PDF Handling**, you can also set up automatic import from the folder of PDF files.

Where there is no document metadata on the PDF (these will appear as : <filename.pdf>) you will need to edit the references. The easiest way to complete these references is to click on Layout in the bottom left corner and use one of the “split” options which allow you to see the PDF whilst editing your record.

Adding references manually

In EndNote, click on **References** and **New Reference**.

Select your **Reference Type** from the drop-down menu. Fill in the relevant fields with the information you have, i.e. author, title and so on.

Enter authors' names in the format Surname, First Name e.g. **Smith, Delia** or **Banks, J O**. Each author should be on a separate line. For *corporate authors* (organisation etc.) you should put a comma at the end ie: **British Broadcasting Corporation,**.

When you have finished entering your reference, click on the X in the top-right corner of the New Reference window.

NB You can set your default output style at this stage by selecting it from the drop-down styles list on the main toolbar. Many of you will be expected to use the **Harvard(Brad)** output style for internal work but styles exist for many of the major journals. (See the Format section of this guide for more details about selecting styles.)

To Preview the way your reference will look, click on **Show Preview** in your EndNote Library reference, the tab next to the PDF viewer.

Groups

EndNote X8 allows you to create groups of references. These are shown in the left hand pane of the EndNote window.

All references you download will be added to your “All References” list. You can file references from here to groups either manually or by certain search criteria by setting up a “smart group”. EndNote help offers further advice on this.

- **All references** is indeed all references in your library, including search results from online searches.
- **Trash** these are records you have marked for deletion. **Warning:** When you delete a record from your EndNote library it is also removed from any groups.
- **Custom Groups** are small collections of references you can pull together for whatever purpose you choose. This may be for a particular assignment or chapter of your dissertation or thesis.
- **Smart Groups** are groups you can set to automatically fill with any results which meet your search criteria, this is populated as you do your online searches.
- **Online Search** this is how you search resources that do not allow direct export (mainly library catalogues). Ensure you are using the **local library mode** (at the top left of the screen) rather than **integrated library mode** or online searches may add unwanted references to your library.
- **EndNote Online** this allows you to add your EndNote Online details and automatically transfer references from your EndNote desktop library to your EndNote Online library and vice versa.

Inserting Files, URLs and Graphics into your EndNote Library

There are 3 fields where you can attach extra information to your EndNote library records.

- **URL** will often include a link back to the file. A link back to the reference within the database is often also included in the DOI field (Digital Object Identifier).
- **File attachments** is where you can attach a file (.pdf, .doc, .odf etc.). To do this, open the reference, right click on the File Attachments field and select attach file browse for the file you want to attach and click OK to attach it.
- **Figure** allows you to attach a figure, picture, image, graphic, equation etc. to your library. Open the reference, right click on the Figure field and select attach file, browse for the image file you want to attach and click OK.

All attachments are held in the EndNote Library's **.DATA** folder. If you are moving your EndNote Library on a memory stick remember to copy the **.DATA** folder too.

Warning: *we have had problems with EndNote libraries being held in dropbox or OneDrive, we recommend you use C: drive storage on your PC, a USB or external drive rather than cloud storage.*

Searching for fulltext PDFs online

Once you have a list of references in your EndNote Library you can automatically search and attach PDF files from many University of Bradford Subscriptions.

You may need to set this up on your computer. Go to **Edit > Preferences > Find Full text** ensure all the boxes are checked and in the **Open URL Path** box type: https://sfx.brad.ac.uk/sfx_local, and in the **Authenticate with** box type <https://brad.idm.oclc.org/login>.

Highlight the articles you want to search for and select **References > Find Fulltext** any PDFs should be automatically attached.

Updating your references using “Find Reference Updates...”

Conducts an online search for updates to references within the databases you have previously searched.

Select the reference or references you want to update, go to **References > Find reference updates...** and it will search other online sources to try to find more complete information on your reference, very useful if you only have a DOI. You can select to fill all incomplete fields or select fields of data to include.

Be aware to do this for your whole library will take some time.

Create your bibliography with EndNote: Cite while you Write

Finding and Inserting Citations as you write your essay

1. You should have a EndNote tab in the ribbon at the top of the screen in MS Word. (If your tab says EndNote Online you will need to select it Preferences > Application and from the drop down list select EndNote).
2. Position the cursor at the location where you would like the citation to appear in your text. (Make sure you are in the MS Word Print Layout view, or some functions may not be available, in Word go to **View > Print Layout**). You might also want to create a heading **Bibliography** at the end of your document.
3. In the EndNote tab in MSWord, select **insert citation**, a search box will appear which will allow you to search through your EndNote library (including any notes in your Research Notes fields)
4. Select the citation you require and select **Insert**.
 - a. If you want to select **multiple citations** press CTRL and click the citations you want to include.
 - b. By clicking on the drop down arrow next to Insert exclude the Author name etc.
5. Repeat the insertion process for each reference you use. EndNote will automatically build up your bibliography within your Word document from the citations you insert into the text.

Editing your citations: Direct Quotations – inserting cited pages information

If you want to enter specific page references into the text in your Word document, e.g. (Jones, 2001, p.21)

- Import the citation into your Word document.
- Highlight the citation.
- In the tab choose Edit & Manage Citations.
- Type page numbers in pages box and choose OK, or use the Suffix box instead.
- This can also be used to include details for secondary citations, or to change the way the citation looks so from (Author, Date) to Author (Date) if you change the use of the authors family name in the sense of the sentence.

Format / Reformat your Bibliography

To change the style of your bibliography, choose the new style from the Style drop down list. Then select **Update Citations and Bibliography**.

Converting to plain text

To send the document as an email attachment, it must be saved as a standard word document with no connection to the EndNote library. Click on **convert citations and bibliography** and then **convert to plain text**. A message will appear warning that a copy of the file will be saved as a new document. The original will still be linked to EndNote, and will still be editable. The new document should be saved separately.

If you've previously used Zotero or Mendeley or other bibliographic software

You can export your library from Zotero or Mendeley as a RIS or RefmanRIS file to import into EndNote. If you need help please *contact your Subject Librarian*.

Using EndNote X8 off campus

EndNote X8 is available on all university owned computers. On the student image it is within the Microsoft Office suite of programmes, and on the staff/research student image it is distributed through Application Installers.

If you wish to have EndNote X8 on your own laptop or computer you must purchase a copy which you can do by going to

<https://www.brad.ac.uk/library/find-out-about/endnote/> - the cost is around £100.

Alternatively you can set up a sync with your **EndNote Online** account (**Edit > Preferences > Sync** and enter the details of your Endnote Online account). *This is not recommended for very large libraries over 4 GB in size.* More details about EndNote Online at: <https://www.brad.ac.uk/library/find-out-about/endnote/>

Comparison of EndNote X8 and EndNote Online

EndNote X8

- Unlimited library size
- Annotate PDFs
- Find Fulltext to automatically add records to your library
- Import folder option for PDFs already on file
- Need software license

EndNote Online

- Limited library size
- Can attach PDFs but no annotation tools
- No find fulltext feature for records you have downloaded but can link back to the original database record.
- No way of importing contents of things you have already read
- Available anywhere