

# A Quick Start Guide to using EndNote 7.0

## 1. What is EndNote and why is it useful to you?

EndNote is a *bibliographic database*, or a collection of references from books, journals, and other sources. It allows you to:

Store, manage, and search for references in an almost unlimited number of tailor made databases, or *libraries*, each of which can hold almost 33,000 entries (32MB), and each entry can have over 32,700 characters of reference information.

Insert selected references into your paper and automatically format the bibliography at the end of your paper, in any number of predefined reference styles, ranging from generic styles such as Harvard or APA, to styles specific to a particular journal, such as Science or Nature, or to a particular publishing house.

EndNote allows you to organize more than just text. Any type of generic image (e.g., BMP, TIFF, JPEG) or application file (e.g., Microsoft Excel, PhotoShop, ChemDraw) can be managed along with your text references by using image and caption fields in any reference type. You can also apply keywords and search for non-textual data the same way as for traditional references.

EndNote 7.0 is now available from Caltech's ITS group at <http://elms05.e-academy.com/caltech/>

Mac users may experience some variations in the materials covered here. Where to go for help and technical support is listed at the end of this guide.

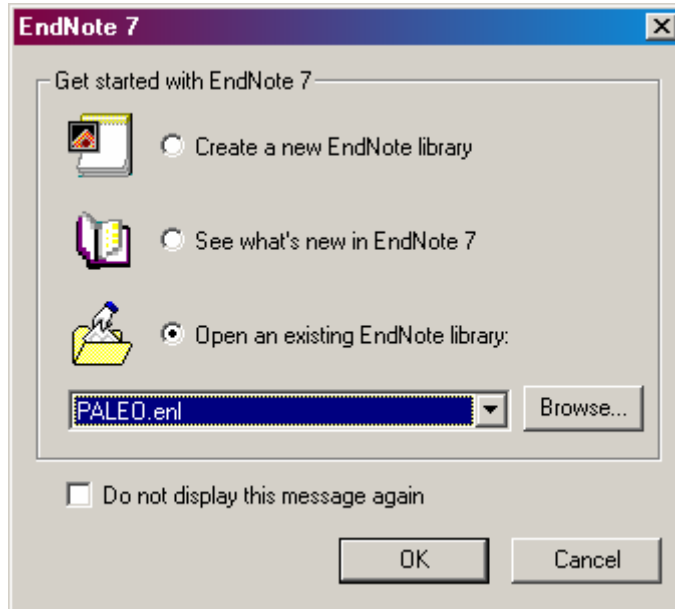
## 2. An Introduction to EndNote Libraries

### Opening and Creating a Library

EndNote references are stored in mini-databases called *libraries*. You can set up individual libraries for specific topics you are researching, or keep all your references in one library. *This latter option is strongly recommended as you can only create a bibliography from one EndNote library at a time.*

Some people like to keep a working library into which they download results from online searches, and another formal library into which they only put references they have read and intend to use in their work.

When you open EndNote, you will see a screen like this:



There is a sample EndNote library called PALEO.enl already set up for practice sessions. This library contains 200 references relating to paleontology. To open, simply click on the OK button. To browse through all 200 references, use the scroll bar or the scroll arrows. This list gives the authors' surname, the year of publication, and as much of the title as can fit in the window.

Note the "SHOW PREVIEW" option. Opening this option allows you to see what your references will look like in your paper. Here the default format is Chicago 14thA style.

**To create your own library:**

From the menu bar, select FILE → NEW

Choose a directory to save your new library [Save in:]

Name the new library

Click on SAVE

**Alternatively, once you have created a particular library:**

You can select FILE → OPEN

Choose the library you wish to work in

## Setting a Default Library

Rather than having to go through the process of selecting a library each time you open EndNote, you can choose a library to be your default library. To do this, open the library you want to set as the default:

From the menu bar, select EDIT → PREFERENCES

Select LIBRARIES

Select ADD OPEN LIBRARIES

Select the name of your chosen library

Select OK


This library will now open automatically each time you open EndNote.

## Sorting your Library

You can choose the look of your library by changing the sort order of the references.

Open a library [Use the PALEO.enl library for this example.]

From the menu bar, select REFERENCES → SORT REFERENCES

Try changing the order of the PALEO library from alphabetical by author, as it is now, to the most recently published first. Use the pull-down menu options to choose the sort order of the different fields. Then decide if it is to be in ascending or descending order by selecting the  icon at the end of the field.

## Selecting, Editing, and Closing References

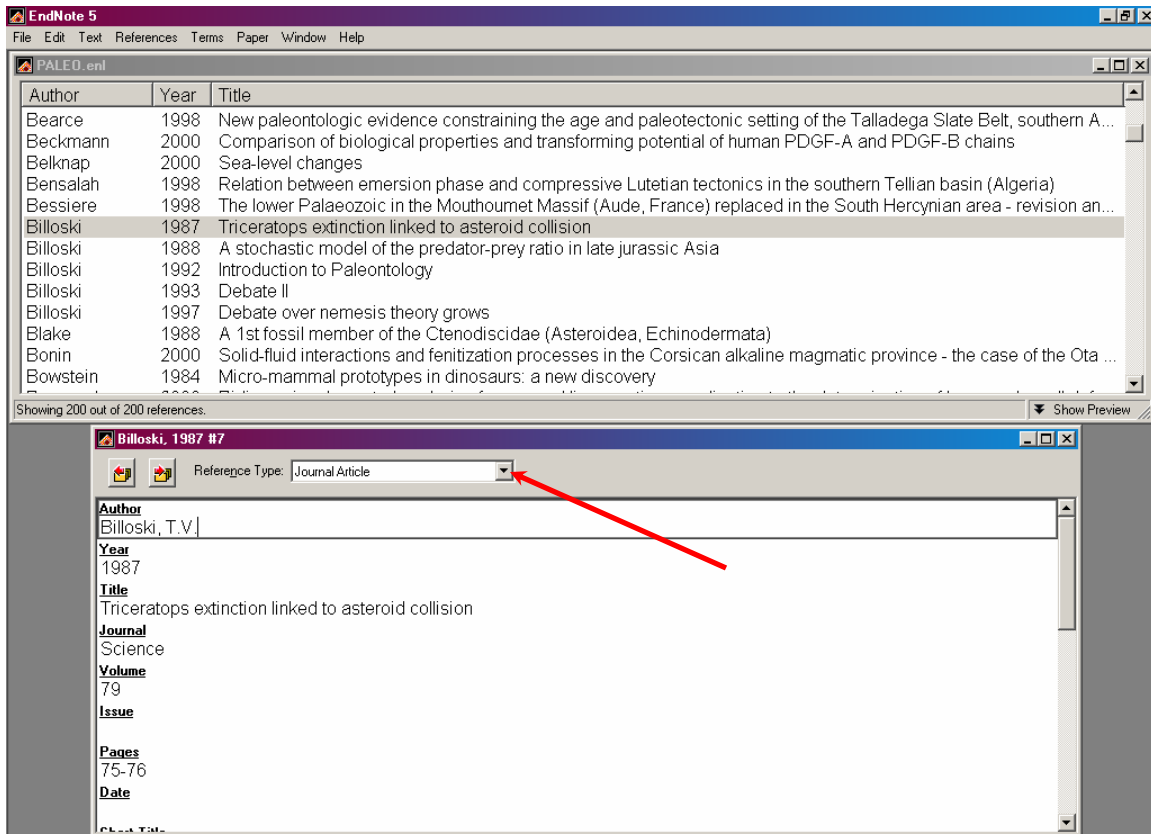
To work with any reference in EndNote it must first be selected. Scroll to find the reference you want and click to select it. Once selected, the reference can be opened, copied, deleted, etc.

A quick alternative way to select a reference is by typing the first few letters of the item you want to find. Selection by typing is made using the column that has been used to sort the references. Normally, the reference list is sorted by author, and the selection works best in this case.

Open the PALEO library and use the typing method to find individual articles by the authors Quilty, Waters, and Billoski. Open a reference by double clicking on Billoski's article: *"Billoski, 1987 Triceratops extinction linked to asteroid collision."*

You now have access to the full information included in this reference.

The record in this case is for a *Journal Article*. Use the pull down menu for *Reference Type* to see the variety of available pre-set reference types in EndNote. Experiment with a few of these to see the different look of each source of information.



To edit any field in the record, simply click on it and type in any changes or additions.

If you decide you have added information that you now want to remove, you can revert to the saved record:

From the menu bar, select **FILE → REVERT REFERENCE**

Do this before you have closed the reference and the record will revert to your previously saved version. Once you have closed and saved the article this option is no longer open to you. To change the reference back requires you to manually edit the reference.

To keep any changes, simply close the record.

### 3. Managing your References with EndNote

#### Adding New References to your Library

To add a new reference to an open library:

From the menu bar, select REFERENCES → NEW REFERENCE

You can now choose which *Reference Type* is most appropriate to your needs.

In most fields you can enter the data as you like—you don't need to follow any formatting conventions. There are a few exceptions:

**AUTHOR FIELD:** EndNote can recognize authors in a few different ways, but the safest and most widely accepted way of entering authors' names is SURNAME FIRST, followed by a comma and then any other names, preferably in full.

If the author is a corporate author, for example Department of the Interior, enter the name FOLLOWED BY A COMMA. This ensures that EndNote returns the name in this order, rather than interpreting it as a personal name and possibly changing the order.

If there is more than one author, enter each name on a new line by pressing ENTER after each name.

**MULTIPLE ENTRIES:** This same convention goes for any field with more than one entry, for example multiple keywords or multiple URL's. Each entry must be on a new line within the field box or EndNote won't be able to recognize these as individual entries when searching.

**YEAR:** Use four digits.

**TITLE:** Do not use carriage returns for long titles as this will show up in your finished paper. EndNote automatically wraps long text.

**PUNCTUATION:** Other than capital letters in the usual places (e.g. proper names) and the commas mentioned in AUTHOR FIELD above, there is no need to use any punctuation. EndNote will add the punctuation required of your chosen citation style when it formats your paper.

Save your new reference by using the X-box "X" to close the new reference window.

## **Choosing a Reference Style**

The style you use to print out a bibliography or reference in your paper will vary depending on the requirements of your department, or the journal to which you plan to submit your paper.

EndNote is able to generate over 1,000 different journal and citation styles. You may want to add the style you'll need before you start writing your paper and working with your references. Once you have inserted citations into a document you can change styles available from within EndNote.

Select EDIT → OUTPUT STYLES → OPEN STYLE MANAGER

In the “EndNote Styles” dialog box, select a style by placing a check mark in the box beside your choice. Example: check “Nature”

Return to EDIT → OUTPUT STYLES and select your choice from the menu; a check mark will appear next to it.

Now go to Microsoft Word.

EndNote formats the in-text citations and creates bibliographies in one step—within Microsoft Word or WordPerfect. To do this you need to:

Open a Word document

On the menu bar select TOOLS → ENDNOTE → FORMAT BIBLIOGRAPHY

The “EndNote Format Bibliography” style confirmation dialog box appears, prompting you to choose a bibliographic style for your paper. Pick from the pull-down menu, Browse, or select OK if the style you wish to use is showing.

## **Printing References**

In the EndNote utility, with an open library, use the PRINT command from the FILE menu as a quick way to print your list of references.

To print a list of references directly from EndNote:

Make sure that all of the references you want to print are either selected (highlighted) or showing in the library window.

From EndNote's EDIT menu, go to the OUTPUT STYLES submenu and choose a style.

From the REFERENCES menu, use the SORT REFERENCES command to sort the library if necessary. Please note, references are printed in the order in which they are listed in the library window. When printing only selected references, the

references are printed in the order in which they were selected. The SORT REFERENCES command unselects any selected references so use the SHOW SELECTED REFERENCES command if necessary before sorting to retain the subset of references you selected.

From the FILE menu, choose PRINT. Be sure to specify the number of copies and range of pages to print.

Click PRINT to print the references.

## **4. Using EndNote while Writing your Paper**

### **Inserting References into your Document**

If you are working with Microsoft Word version 6, 7, 97, 2000 or WordPerfect 6.1 to 9.0, or anything newer, EndNote “add-ins” are automatically installed into the Tools menu option to allow you to switch between word processing of your document and selecting references to insert from EndNote.

If these add-in commands are missing from your version of Word:

Go to TOOLS → TEMPLATES AND ADD-INS

Then check the box for EN7CWYW.dot and/or EN7Cwyw.wll

For the purposes of this tutorial, we will use a document already set up to coincide with the PALEO library in EndNote. First make sure that this library is open. Open Word and then find the EndNote *Examples* folder.

Open the first document called *Paleo* by clicking on it.

This document already has a number of references inserted into it.

### **Making Changes**

If you need to make changes to your document—adding a citation for example—this should be done through EndNote, not by simply making changes to your Word document. To do this, you will need to first *unformat* your bibliography:

From the menu bar, select TOOLS → ENDNOTE → UNFORMAT CITATIONS

Make any necessary changes, and then

Select TOOLS → ENDNOTE → FORMAT BIBLIOGRAPHY

Your paper will become formatted again.

As an example, add one final reference to this document, immediately following the final sentence “possibly with a larger wing-like arm.” Position the cursor after “arm” and before the period, and insert a space—this will separate the text from the citation, as you would do if you were inserting a reference manually. Leave the cursor at this spot and from the menu bar select:

TOOLS → ENDNOTE → GO TO ENDNOTE

This starts up EndNote, if it isn’t already running, and should take you directly to your default library. If this isn’t the location of the reference you wish to insert, open the appropriate library. Now select the reference for insertion—in this case the article by Gardiner.

Then back in Word, go to TOOLS → ENDNOTE → Insert Selected Citation

The Gardiner reference will automatically be inserted at the spot in your document where your cursor was placed.

To remove a citation, highlight the footnote number in the text. Now right click the mouse to open up the options menu. Now select EDIT CITATION → REMOVE → OK

You can also use the EndNote task bar icons or these quick keystrokes to do the same thing:

[Alt] 1 for maneuvering between your EndNote library and your Word document

[Alt] 2 to insert citations

[Alt] 3 to format your bibliography

### **More than your average citation...**

You may wish to cite articles in different ways from the standard “author, date...” format. Here are some possibilities:

**Multiple references:** When selecting references for insertion, hold down the *Control* key and select all the references you wish to cite. These will all be included in the same set of brackets, in alphabetical order.

**Date only:** To insert (1988) rather than (Gardiner, 1988) edit the temporary citation so that it looks like this: [,1988 #69] Make sure you leave the comma before the date.

**To insert text before the author’s name:** For example, to create the citation: (see also Gardiner, 1988), place a space and a backslash before the author’s name so that it looks like this: [see also \ Gardiner, 1988 #69]

**To add a page number to a citation:** Insert a comma and a space after the temporary citation number and add the page details in the format you wish them to appear, for example: [Gardiner, 1988 #69, pp 2-5]

**To add only a bibliographic reference:** Inserting only [#69] will give no citation in the text but will add the reference to the bibliography.

## **Saving your Document**

To save your document, save it as you would any other Word document. You can then print the file or open it on other computers. Remember, if you want to add, delete, or edit citations, you'll need to have the EndNote library open and unformat the citations first.

## **5. Importing References to your EndNote Library**

When writing a research paper, one of your tasks should be performing a literature search to see what has already been written on your topic. You can then build on work that has already been done and cite those works in your paper. The Caltech Library System subscribes to many bibliographic databases, some of which are compatible with EndNote. This means that you can search online and easily import bibliographic references into your EndNote library.

### **Direct Transfer of Web of Science References into an Endnote Library**

Since Web of Science <http://wos.caltech.edu/isi/isicgi/CIW.cgi> and EndNote are produced by the same organization, importing references to your library is extremely easy.

Open EndNote and create a new library into which your references will be imported. There is no need to do this if you want to import Web of Science records into an already existing library.

Run a search in Web of Science on a topic of your choice.

Example: fluid mechanics

Mark the records you want to export into EndNote.

Click on the Submit Marks button to add them to your Marked List.

When you have finishing marking all the records you want, click on the Marked List button.

Select the bibliographic information you want to save in each record by checking the boxes beside the select field names you want in “Step 1” on the Web of Science screen.

*Note: the Author, Year, Title, Journal, Volume, Issue, and Page fields are automatically saved. You must select Abstract from within the Web of Science Marked List if you want to also export the abstract.*

*Note: Some of fields are not exported into EndNote. For example, checking the Cited References box does not export the cited references.*

Select the Export to Reference Software button.

This will automatically open up the EndNote "Select a Reference Library" dialog box.

Open the library in which you want to import the references. Records are then inserted into your library from Web of Science.

*Note: If you added records to an already existing library you will see that only the latest batch of records is showing in EndNote. In order to view all of the records in your library:*

*On the menu bar go to REFERENCES → SHOW ALL REFERENCES*

### **Direct Exporting of Ovid Database References to an Endnote Library**

Open Endnote and create a new library into which your references will be imported. There is no need to do this if you want to import Ovid records into an already existing library.

Run your search in the Ovid database of your choice (Medline, INSPEC, Biosis)

View your search results by clicking on the Display button in the Search History table.

Locate the Citation Manager at the bottom of the results page.

Manually check or use the Citation Manager to select the citations you want and the fields you want to export.

Select "Direct Export" under the Result Format section

Click on the Save button.

This will automatically open the “Select a Reference Library” dialog box. Open the library in which you want to import the references. Again, use REFERENCES→SHOW ALL REFERENCES to see the complete set of references in your library.

### **Searching a Database using a Z39.50 Connection File**

Currently, the following Caltech licensed databases can be searched through Endnote using z39.50 connection files. [z39.50 is a client/server-based protocol for searching and retrieving information from remote files.]

CLAS (Caltech Library Catalog)  
Web of Science  
INSPEC (via OVID)  
Biosis  
Medline (via OVID)  
MLA Bibliography (via OVID)

Download these connection files at: <http://library.caltech.edu/help/endnote/>

To open a connection file:

On the EndNote menu bar select: TOOLS → CONNECT → CONNECT

The “Choose a Connection File” dialog box opens.

Find the database or catalog that you would like to connect to and search.

Example: INSPEC (Ovid)

*Note: Go to <http://library.caltech.edu/databases/> for a full listing of databases the CLS subscribes to. New and updated Connection Files can be downloaded from the Endnote website <http://www.endnote.com>. Connection files for Ovid databases and CLAS can be found at: <http://library.caltech.edu/help/endnote/>.*

Click on the “Connect” button

[If the password/ID dialog box opens, just leave it blank and select OK.]

*Note: You can prevent this box from opening by going into: FILE → CONNECTION FILES → OPEN CONNECTION MANAGER. Select the file you want and click Edit. Click on Connection Settings and under Login Information Required make sure the UserId and Password check boxes are unchecked.*

The “Search” dialog box will open.

Using the pull-down options, execute a search.

Example: Author contains Ramchandran, S.

Click on the “Search” button.

The “Confirm Remote Search” dialog box opens and displays how many references were retrieved. Now you can either select OK to import those references into an intermediary library or Cancel and re-do your search.

Click on the OK button.

The references now appear in an intermediary library. Use the “Copy all references to:” button and choose whether to copy the references to a new library or to a previously created library.

Example: Create a new library named: Ovid INSPEC References. Select SAVE.

The new references appear in your library.

Close your connection to INSPEC by selecting: FILE → CLOSE CONNECTION

The “INSPEC at Ovid” dialog box will open to prompt you to “Discard references?”

Choose OK.

This method of searching and getting references into your libraries is fine for limited known item searching, but it is not the recommended method. You are strongly urged to search the databases directly and then import your results into EndNote.

## **6. EndNote Features and Support**

This Quick Start Guide covers only the basics of EndNote to get you comfortable using this tool. The online EndNote Manual that comes with your copy of EndNote is quite extensive and offers many more tools and options.

## **The Caltech Library System EndNote pages**

The CLS has EndNote information, tutorial, filter, files, etc. available via:

<http://library.caltech.edu> → yellow Help button → EndNote

<http://library.caltech.edu/help/endnote/default.htm>

## **The EndNote Website**

EndNote is owned and produced by the Institute for Scientific Information (ISI). This group also owns two other major bibliographic software packages called ProCite and Reference Manager, as well as the Web of Science database.

ISI hosts a wealth of information and help for EndNote users at:

<http://www.endnote.com>

From this site you can:

- Download a demo copy of EndNote to use for 30 days
- Download an interactive tutorial on using EndNote
- Download updated connection files and filters. Most of these are provided by ISI, but they also support an FTP site where many EndNote users have loaded their own modified versions of filters and connection files. Remember that these files are not specific to CLS databases.

## **EndNote Listserv**

You can join an EndNote users listserv—very helpful for obtaining technical help from other EndNote users at <http://lists.adeptscience.co.uk/endnote/>. This site has a very extensive archive of questions and answers that can help you as you become an EndNote expert.

## **Library Support**

Call x3404 or e-mail [library@caltech.edu](mailto:library@caltech.edu)