



ENDNOTE X8

Introductory guide

This is an introduction to the basics of using EndNote X8
at the University of Huddersfield.

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EndNote X8 training

This is a basic introduction to the key elements of EndNote X8, further support/ training can be found at <https://www.hud.ac.uk/library/borrowing/endnote/> and from your Subject Librarian.

Section 1: Creating an EndNote library via Summon

Exercise 1

- Click on the **Start** button and select All Programs, EndNote, EndNote Program OR type EndNote into the search box then click **EndNote Program**.
- Select **Create a new library**. You will need to give your EndNote library a name and save it to your **K drive** for this exercise.

Section 2: Adding references to your EndNote library

Exercise 2

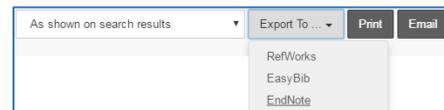
- Make sure an EndNote library is open, minimise the screen. Using Internet Explorer*, Open Summon via the university web pages or by typing <http://library.hud.ac.uk/> into the web browser.
- Perform a search in Summon and save at least 10 results by clicking on the **save this item** icon



on the right hand side so it changes colour .

- After saving a number of results click on the **saved items** folder in the top right hand corner  and a list of all items saved will be displayed.

- Select **EndNote** from the **Export To...** drop down menu and a file download box will appear, and then select **Open**.



- Your selected items are automatically imported into the open EndNote library.

***Tip:** EndNote does work in the Firefox and Google Chrome browsers, but they download slightly differently. If in doubt, click on **Open** when you are prompted.

Section 3: Amending and manually adding references:

- To amend a reference in your library double click on the item you want to change, this opens the full record and all fields that can be populated. Amend the details as required. Select **File** and **Save** from the top menu, or when you click on to another EndNote entry, you will be presented with a pop box to save the changes.
- To manually add a new reference to your library either click the  button, or select **References** and click **New Reference** from the toolbar.
- You now have a blank template to manually type in the reference information to each of the fields. You can use as much or as little detail as you want.

NB. The default template is **Journal Article**, click the drop down menu to select another option:

Reference Type:

Each template has different fields to complete

Exercise 3

Add the details for the following titles to your EndNote library:

Book

Mackey, T. P., & Jacobson, T. (2011). *Teaching information literacy online*. London: Facet.

Journal article

Cushing, J. B., & French, J. (2013). Science data management: Maximizing the yield. *Computing in Science & Engineering*, 15(3), 8-10. doi:10.1109/MCSE.2013.66

Tips:

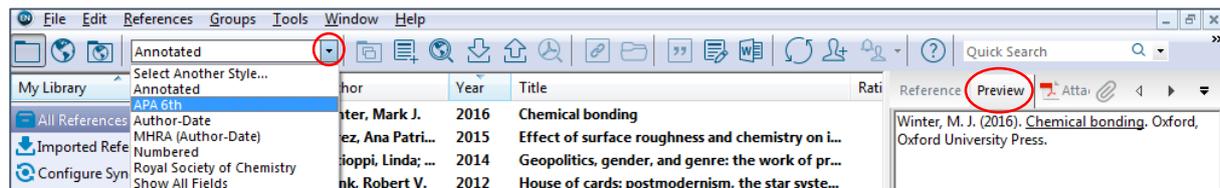
- If there is more than one author, use the return key between author names
- Authors can be entered in the format Bloggs, Jo. C. or Jo C. Bloggs
- Organisations' names must be followed by a comma e.g. Department of Health, otherwise EndNote will assume the last word is an author's surname and your citations will appear as (Health 2005) instead of (Department of Health 2005).
- Red text indicates a name which has not been entered into a particular EndNote library before.
- You need to enter your references in the case in which you want the citations to appear (e.g. Bloggs, Jo C not BLOGGS, JO C, or bloggs, jo c).
- A digital object identifier (DOI) is a character string used to uniquely identify an object such as an electronic document. About 90% of journals now use DOIs to link to the electronic version of their articles. APA 6th (the University approved referencing system) demands a DOI to be added to a journal article reference if available. More information is available at <http://www.doi.org/>

Section 4: Changing a referencing style

EndNote has a wide range of referencing styles to choose from, including the university's approved standard **APA 6th** (*this is the American Psychological Association's version of Harvard*). The default is usually set to Annotated.

Exercise 4

Select the drop down arrow and choose **Select Another Style** (you may have to wait a minute for the styles to load in).



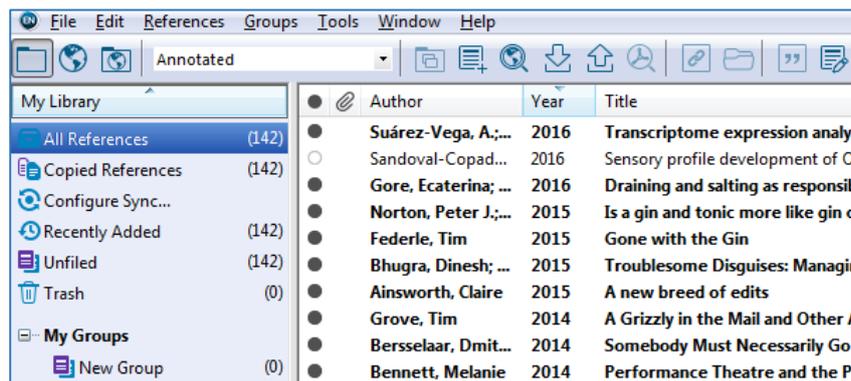
From the alphabetical list of referencing styles that appear, click **APA 6th**. Click **Preview** in right hand column to see the change to the referencing style.

Section 5: Using groups to organise references

Endnote has a feature called groups to help organise references.

Exercise 5

Select the **Groups** menu and choose **Create Group** from the options. Your new group will appear in the left hand pane on the screen and you can name it there.



Once you have set up groups you can drag references into a group.

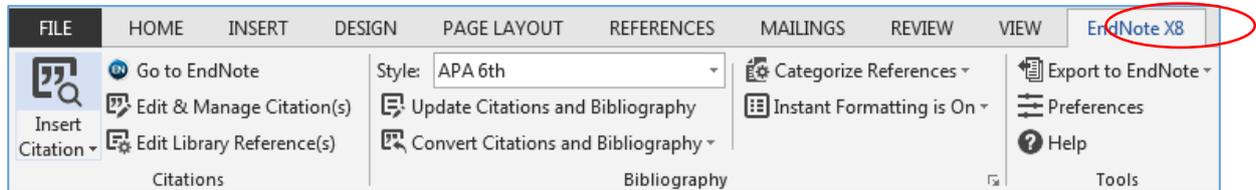
Tips:

- The same reference can belong to more than one group.
- You can still see all references by clicking on the option at the top of the left hand pane.
- You could use groups to organise references by theme, chapter, or for different projects
- Smart groups allow you to automatically add references to a group if they meet a criteria, e.g. a keyword or author name

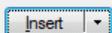
Section 6. Citing references in Word (inserting in-text citations)

In addition to storing and managing your references, EndNote allows you to automatically insert in-text citations and create a bibliography in Word.

When EndNote is installed, a Ribbon is added to Word which allows 'Cite While you Write' to be used to cite References from EndNote in Word documents.

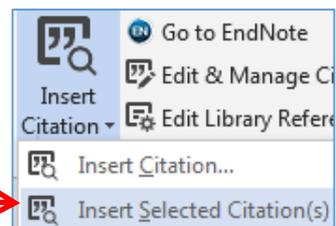


Exercise 6

- Minimise your EndNote library and open Word. Type a few sentences into the document – they don't have to be real research, you can just make something up! (NB. In your office or at home the document would be your thesis / an article etc.)
- Click the **EndNote X8** tab at the top of the screen to see the EndNote options in Word.
- Choose a point in the document where you wish to add a reference. Click  from the options across the top of your screen. Then select **Insert Citation...**
- Type the letter **a** in the search box and hit **Find**. This will show a list of ALL references you have in your open EndNote library.
- Click on the reference you wish to add to your Word document then **Insert**. The reference you selected should automatically be inserted into your Word document (as a citation), including the full reference towards the bottom of the page (starting a bibliography). NB. At this stage, you can select what format you would like to insert your reference, by clicking on the  triangle on the Insert button (for more information on these formats, see Section 7).
- Repeat this a few times with other references from your EndNote library.

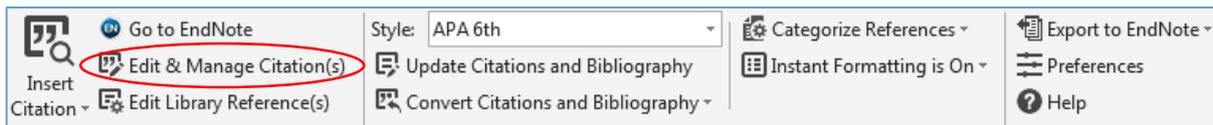
Tips:

- Instead of typing "a" for all citations, you can search by author/ keyword to find the relevant citation.
- Alternatively you can return to your EndNote library, highlight the reference/s you want to insert and return to Word to select **Insert Selected Citation (s)**.



Section 7: Editing and managing citations

Once citations have been added to your Word document you may wish to edit them. You may need to include page numbers (for example if you have used a direct quote), or you might want to exclude the author (for example when the author's name appears naturally in the text: Jones (2013, p.5) suggests that...). This can be done using the **Edit & Manage Citation(s)** option in the EndNote ribbon of Word.



Exercise 7a: Adding page numbers to your citation:

- Highlight the citation (it will appear greyed out), and on the EndNote X7 tab in Word click on **Edit & Manage Citation(s)**
- A pop-up box will appear, enter the page number in the **Pages:** section (if you want to add multiple pages use a hyphen between numbers, e.g. 5-7)

Edit Citation	Reference
Formatting:	Default
Prefix:	
Suffix:	
Pages:	23-26

Exercise 7b: Excluding author/year from your citation:

- Highlight the citation (it will appear greyed out) and on the EndNote X7 tab in Word click on **Edit & Manage Citation(s)**
- A pop-up box will appear, click on the **Formatting:** drop down menu. From here select the option you want to apply to the citation:

Edit Citation	Reference
Formatting:	Default
Prefix:	
Suffix:	
Pages:	

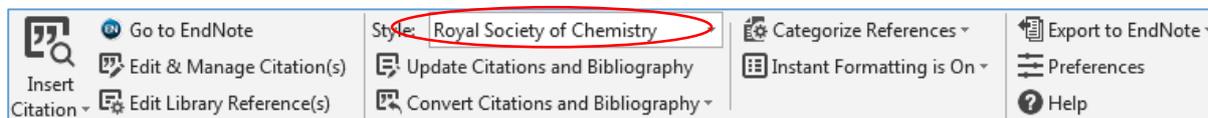
- Default
- Display as: Author (Year)
- Exclude Author
- Exclude Year
- Exclude Author & Year
- Show Only in Bibliography

- Click **OK** and the citation will automatically change to exclude author OR year whichever was selected).

Tip: The author/year is just hidden and can be retrieved by highlighting the citation, clicking on **Edit & Manage Citation(s)** and selecting the **Default** option.

Tip: As well as changing the referencing style within your EndNote library, you can also change the style within your Word document (this will not affect the style in EndNote).

- In Word, place your cursor at the beginning of the text and select the **EndNote** tab.
- Click on the drop down arrow next to **Style** and **Select Another Style...**



- From the alphabetical list of referencing styles choose a different referencing style.
- The referencing style of your Word document should have changed to your selected style.

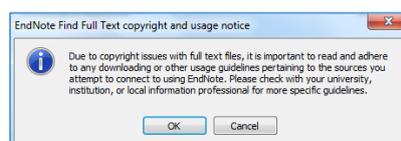
Section 8: PDFs and other attachments

There are various ways of managing your PDFs/ file attachments within EndNote so a file can be linked to the reference in the Library. There are three main options depending on where you are in the research process.

Exercise 8a

You have downloaded a reference into your Library. You can use EndNote to locate the PDF of the full text through our electronic journal subscriptions.

- In the top menu click on the **Find Full Text...** icon . EndNote will search the University's subscriptions and pull in the full text article PDF, if possible.
- NB. You may be asked to log in with university login and password if you are not already logged in. Once logged in click **Continue** and you will see this pop up screen:



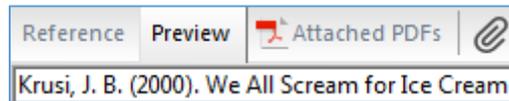
- Click on OK and EndNote will start searching for matches. You can check the success rate on the left hand column and the PDFs will be attached (see paper clip icon) to the relevant records.



Exercise 8b

You have downloaded a reference into your Library. You have a PDF of the full text of the article saved. To link the two items:

- Click on the reference in your EndNote library to which you want to attach the PDF.
- Click on the paperclip icon next to the Preview screen

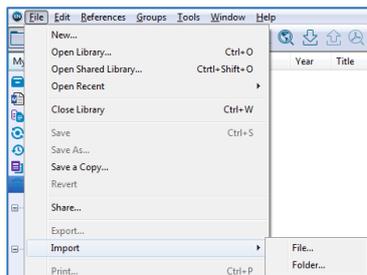


- A pop up box will open up so you can browse to locate the PDF on your computer/ USB stick.
- Click on **Open** and the PDF should now appear in the right hand section of your EndNote library, under the paperclip icon.
- To save the changes to this record, simply click on another reference and EndNote will prompt you to save.

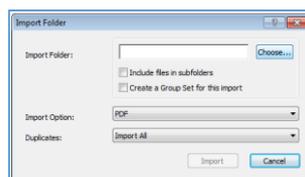
Exercise 8c

You have downloaded the PDF of the full text on to your computer and want to add it to EndNote. If you have already collated a lot of research, this exercise can save you time.

- Click on **File** go to **Import** then select **File** (or one PDF) or **Folder** (for multiple PDFs)



- Click **Choose...** and then search for the Folder full of PDFs you have already saved and want to import into EndNote.



- Click **Import**, EndNote will *attempt* to pull the information from the saved articles creating new references in your library and attaches the PDF.

Tip: EndNote is compatible with most of the other electronic databases to which we subscribe, see <http://hud.libguides.com/AZ> for the full list.

You can also use it with Google Scholar <http://scholar.google.com> although it does restrict you to importing one reference at a time, and the quality of the reference should always be checked for accuracy. For help with downloading from this and other sources, check each resource help pages or contact your Subject Librarian at library@hud.ac.uk

Section 9: Saving, backing up and moving your EndNote Library

We always advise you save your EndNote Library on the K drive (personal storage area) on the University network so it can be backed up every night. You can access it from home via:

- Staff Hub <https://staffhub.hud.ac.uk/>
- Student Hub <https://studenthub.hud.ac.uk/> or
- via UniDesktop
 - <https://staff.hud.ac.uk/it/usingyourdevice/unidesktopforstaff/>
 - <https://students.hud.ac.uk/it/unidesktop/howdoiaccessunidesktop/>

If you do need to save or move your EndNote Library on to another device (e.g. USB or another computer), remember there are **two** files to copy:

Name	Date modified	Type
 X8 test.enl	26/06/2017 16:47	EndNote Library
 X8 test.Data	25/07/2017 09:13	File folder

The Data file contains any PDFs you have saved in the Library and also style changes you might make to the output styles.

Tip: EndNote libraries should not be saved on a cloud service, like Dropbox, Google Drive, OneDrive, etc. as they are likely to get corrupted at some point. However, backups of the library created via 'Tools/Compressed Library', can be stored on these services and this is a good way to ensure you have a backup available at any time, should you need it.

Section 10: Where can I access EndNote?

The University holds a site licence for EndNote:

- Available on all University PCs
- Unidesktop – <http://unidesktop.hud.ac.uk>

You can sync your Library via the web with **EndNote Online**. This allows you to use EndNote off-campus and it has a different interface and cut down functionality. For instructions to set up this resource, see the publisher's website <http://endnote.com/sites/en/files/m/pdf/en-online-qrc.pdf>

You can purchase a personal copy of EndNote for your own laptop / PC / Mac (from approx. £90 with a student discount) from <http://www.bilaney-consultants.co.uk/our-products/endnote.html> (a month's trial is available for you to evaluate it).

Section 11: Further help

We highly recommend using the Help section within EndNote as it is very comprehensive:



For further support, you can always contact your Subject Librarian on

- **library@hud.ac.uk**
- **01484 472700**

We also recommend the following websites:

- Library web pages on EndNote <https://library.hud.ac.uk/pages/endnote/>
- EndNote training videos <https://www.youtube.com/user/EndNoteTraining>
- EndNote User Guide http://clarivate.libguides.com/endnote_training/users/enx8
- EndNote website <http://www.endnote.com/>