

EndNote^{x9}

Introduction to

EndNote Desktop

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EndNote X9

This is a basic introduction to the key elements of using the desktop version of EndNote X9, further support/ training can be found at

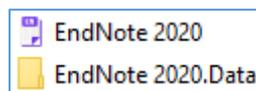
<https://www.hud.ac.uk/library/borrowing/endnote/> and from your Subject Librarian.

Section 1: Getting started

This section assumes you already have EndNote installed on the computer you are using, e.g. on campus. If you do not, see Section 10 to download EndNote to your computer or laptop.

Exercise 1: Creating an EndNote library

- Open the EndNote program on your computer.
- Ignore any pop ups (just close each window).
- Click on **File** from the top menu then **New**.
- Give your library an appropriate name and save to your K drive (if on campus) or suitable drive on your home computer.
- You will have two files associated with your EndNote library which you will need if saving/ back up to another device.



You are ready to start adding references to your EndNote library. The most efficient way is to add them from Summon or another library database.

Section 2: Adding references from online resources

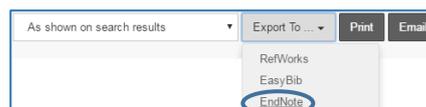
You can use a wide range of electronic resources from which to import references into EndNote. Each resource works in the same format of selecting items and creating a download file, but will have slight variations.

We will start with the University of Huddersfield's main resource, Summon, which contains information about all the print resources and the majority of electronic resources in our collection.

Exercise 2: Adding references from Summon

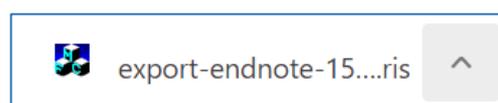
- Make sure an EndNote library is open, minimise the screen. Open Summon via the university web pages or by typing <http://library.hud.ac.uk/> into the web browser.
- Perform a search in Summon and save at least 3 books and 3 journal articles by clicking on the save this item icon  on the right hand 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.

- From the **Export To...** drop down menu choose **EndNote**.



- A file download box will appear (each browser will differ in its display).

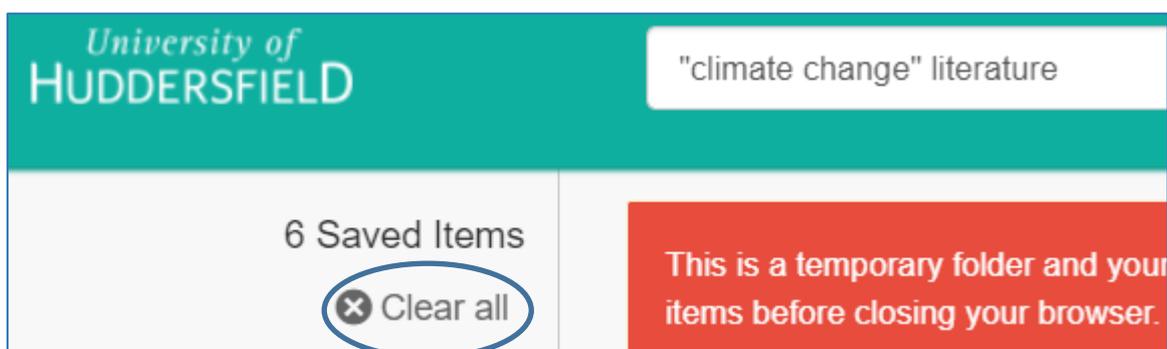
- The download box will appear at the bottom of the screen in Google Chrome. Double click to open the file in EndNote.



- EndNote will automatically re-open and you will see the imported references in your Library.

Author	Year	Title	Rating	Journal	Last Updated	Reference Type
Bassett, Thomas ...	2013	Déjà vu or something new? The adaptation co...		Geoforum	14/02/2020	Journal Article
Feinstein, Steph...	2017	Critical perspectives on climate change			14/02/2020	Book
Gobiet, Andreas;...	2014	21st century climate change in the European A...		Science of the ...	14/02/2020	Journal Article
Hahn, Rüdiger; R...	2015	Organizations, Climate Change, and Transparen...		Organization &...	14/02/2020	Journal Article
Hahn, Robert Wi...	2009	The economics and politics of climate change			14/02/2020	Book
Johns-Putra, Ad...	2016	Climate change in literature and literary studie...		Wiley Interdisc...	14/02/2020	Journal Article
Trexler, Adam	2015	Anthropocene fictions: the novel in a time of c...			14/02/2020	Book

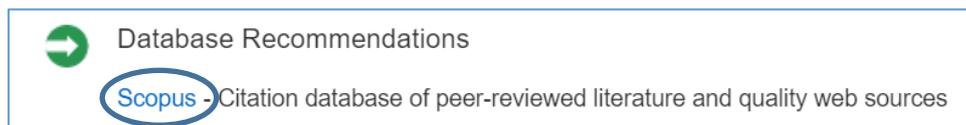
NB. If you are searching Summon again, remember to clear any saved items, to avoid sending duplicate references to EndNote in the same session.



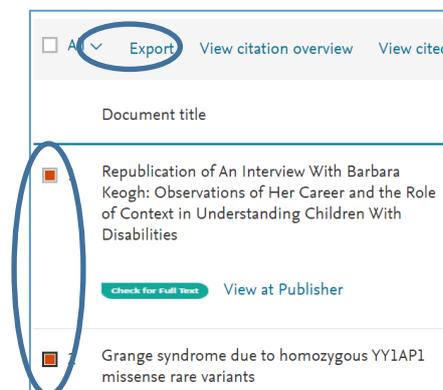
The next exercise demonstrates exporting from Scopus, which is a key multi-disciplinary resource available at Huddersfield. For help with exporting from other resources (full list at <http://hud.ac/ges>), contact your subject librarian.

Exercise 3: Adding references from Scopus

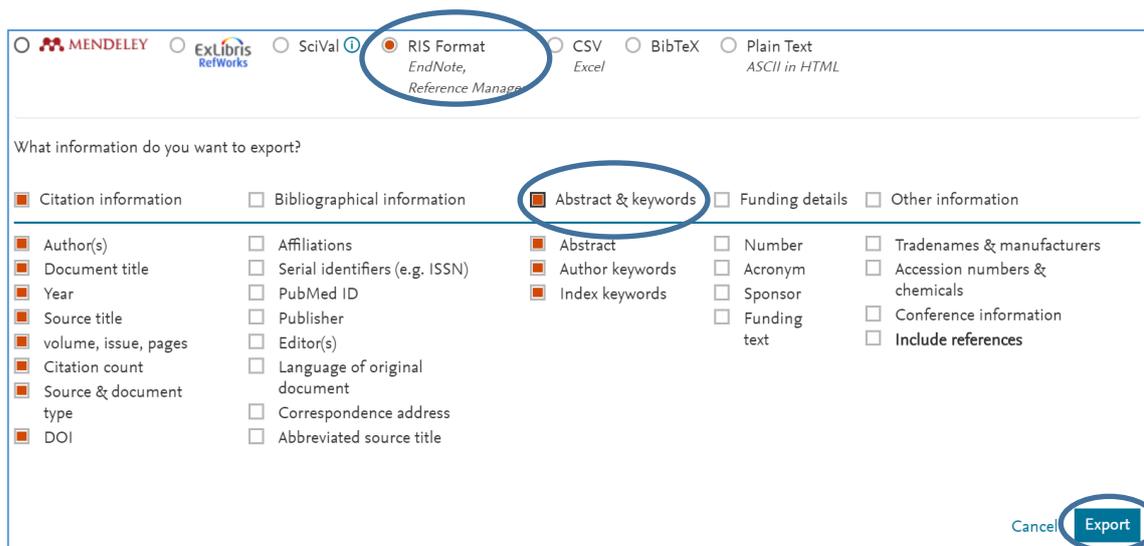
- Return to the Summon homepage <http://library.hud.ac.uk/> and type **Scopus** into the search box.
- Select the link to **Scopus**



- If prompted to log in, use your university username and password.
- Do a search in Scopus and click in the boxes next to the relevant title to select 6 items to export.
- Click on **Export** from the top menu.



- Select **RIS format** and **Abstract & keywords** then **Export**.



- A file download box will appear (each browser will differ in its display).
- The download box will appear at the bottom of the screen in Google Chrome.  Double click to open the file in EndNote.
- EndNote will automatically re-open and you will see the imported references in your Library.

Section 3: Amending and manually adding references

It is important to proof-read all imported references, as there can often be missing data or errors in the original input process.

To amend a reference in your library, double click on the item you want to edit. The various fields are then visible to edit.

Some fields may turn red (author and journal) to indicate this is the first instance of that name. This helps ensure consistency of name spellings, e.g. Khan, S. K. could also be listed Khan, Sudheer or Khan, S.

You can scroll down to the **Research notes** field and add your own comments/ tags if you wish. These are then searchable in EndNote.

Once you have edited the reference, click on **File** then **Save** from the top menu.

Sometimes you might have a reference you cannot locate in Summon or Scopus, e.g. a website, a live performance or a printed leaflet. EndNote has a number of templates from which to choose.

Exercise 4: Manually adding a reference

- 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
- The default type is Journal Article, choose **Web Page** from the **Reference Type** drop down box.
- Complete the template as per below (NB. You will need to scroll down to find the URL field).

Reference Type: Web Page
Rating * * * * *
Author The Climate Coalition
Year 2020
Title Home truths report
URL https://www.theclimatecoalition.org/home-truths-report

- Click on **File** then **Save** from the top menu.
- Close this reference by clicking on the **small x** in the top right-hand corner.

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

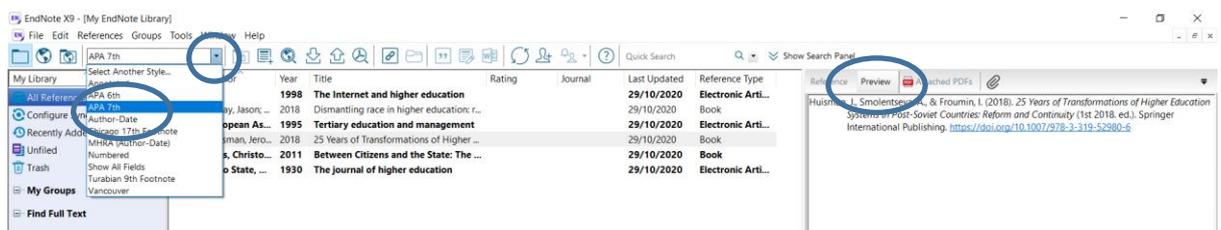
- Organisations' names must be followed by a comma e.g. Department of Health, otherwise EndNote will assume the last word is an author's surname and your citations will appear as (Health 2005) instead of (Department of Health 2005).
- **Red text** indicates a name which has not been entered into a particular 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 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 7th (the University approved referencing system) requires a DOI to be added to a journal article reference if available.

Section 4: Changing a referencing style

EndNote has a wide range of referencing styles to choose from, and the default is usually set to Annotated. The university's approved standard is **APA 7th** compiled by the American Psychological Association.

Exercise 5: Change reference style to APA 7th

- Select the drop down arrow and choose **APA 7th** from the list of options. NB. If it is not visible, click on **Select Another Style** to select from the 100s of styles available.
- Click **Preview** in right hand column to see the change to the referencing style.

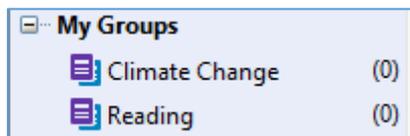


Section 5: Using groups to organise references

EndNote has a feature called groups to help organise references. You can organise by topic, thesis chapter or module code as you prefer.

Exercise 6: Creating groups

- Click on **Groups** then **Create Group** from the top menu. Alternatively, you can right click on **My Groups** in the left-hand menu.
- Double click on the **New Group** and rename it as appropriate.
- Add a second group in the same way.



- You can either drag each reference into the group or right click on the reference and select **Add References To** and then select the relevant Group.

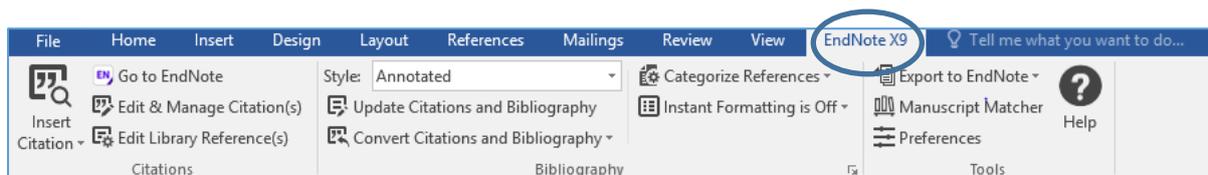
Tips:

- 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 specific criteria, e.g. a keyword or author name.

Section 6: Creating citations and a bibliography in Word

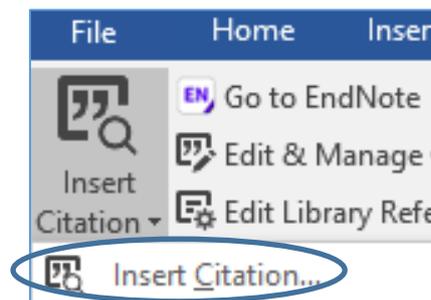
In addition to storing and managing your references, EndNote allows you to automatically insert in-text citations and create a bibliography in Word.

When EndNote is installed, a toolbar is added to Word which allows 'Cite While You Write' to be used to cite references from EndNote in Word documents.

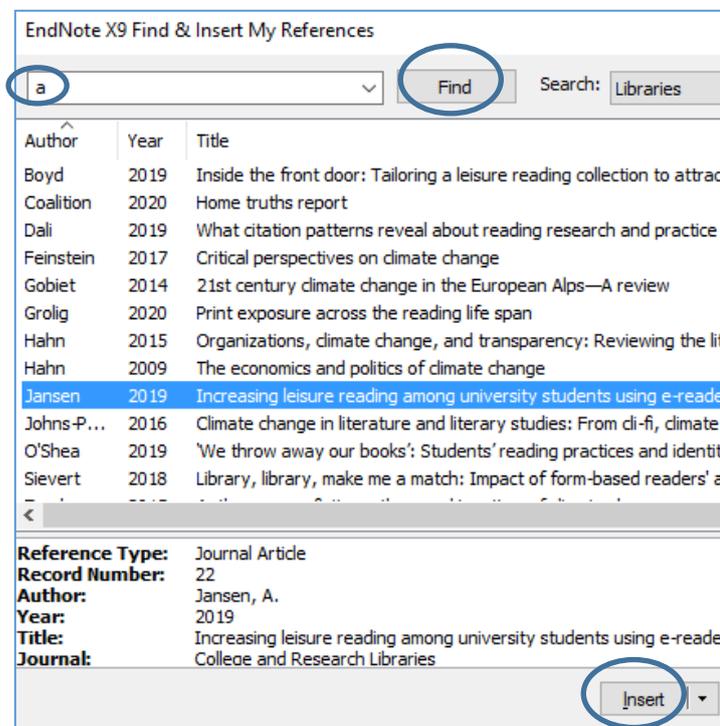


Exercise 7: Adding citations and formatting a bibliography in Word

- Minimise your EndNote library and open Word. Type a few sentences into the document – just make something up!
- Click the **EndNote X9** tab in the Word toolbar.
- Choose a point in your text where you wish to add a reference.
- Click on **Insert Citation** from the EndNote toolbar and select the first **Insert Citation** option.



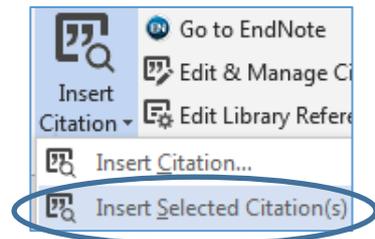
- Type the letter **a** in the search box and click on **Find**. This will show a list of ALL references you have in your open EndNote library.
- Click on the reference you wish to add to your Word document then **Insert**.



- The reference you selected should automatically be inserted into your Word document (as a citation) and the full reference will be towards the bottom of the page (starting a bibliography).
- NB. At this stage, you can select in what format you would like to insert your reference, by clicking on the triangle next to the Insert button (for more information on these formats, see Section 7).

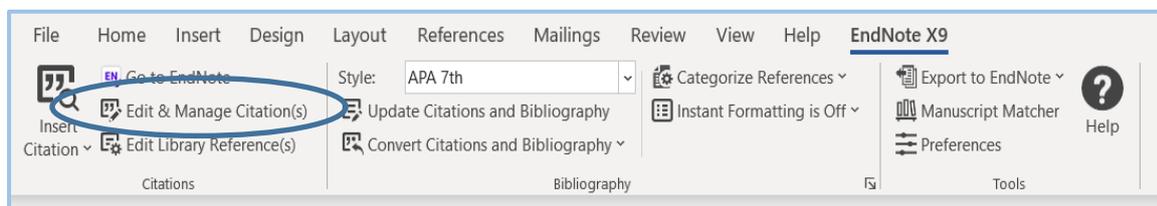
Tips:

- 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 citations in Word

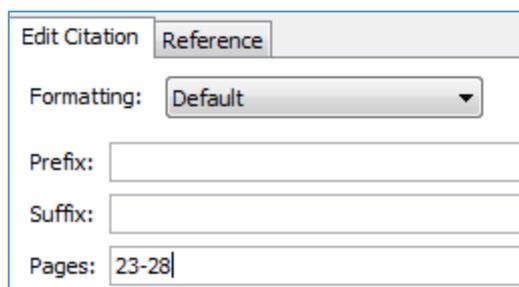
Once citations have been added to your Word document you may wish to edit them. You may need to include page numbers (for example if you have used a direct quote), or you



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.

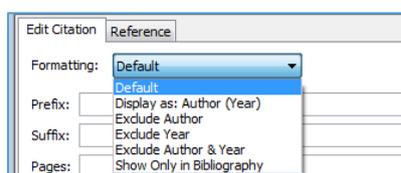
Exercise 8a: Adding page numbers to your citation

- Highlight the citation (it will appear greyed out), and on the EndNote X9 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).



Exercise 8b: Excluding author/year from your citation

- Highlight the citation (it will appear greyed out) and on the EndNote X9 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:



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

Tips:

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.

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...**

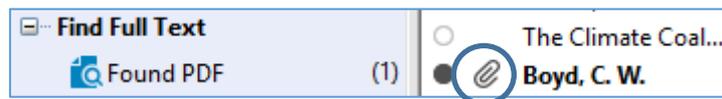
Section 8: PDFs and other attachments

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 9a: Downloading a PDF into EndNote

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

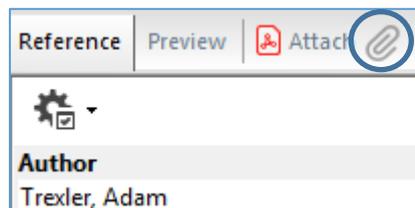
- In the top menu click on the **Find Full Text** icon . EndNote will search the University of Huddersfield's subscriptions and pull in the full text PDF, if possible.
- You may be asked to log in with your university log in and password.
- Click on **OK** and EndNote will start searching for matches.
- You can check the success rate on the left column and the PDFs will be attached (see paper clip icon) to the relevant records.



Exercise 9b: Adding a PDF to a reference

You have downloaded a journal reference in your Library. You also have the PDF of article saved. To link and save the PDF in your EndNote library:

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

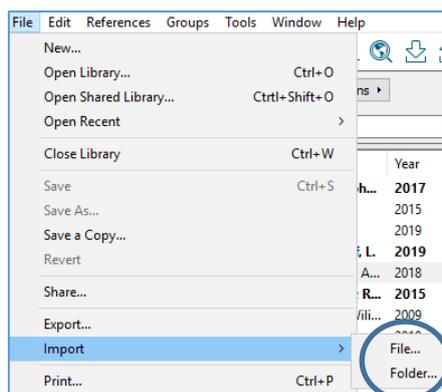


- A pop-up box will open up so you can browse to locate the PDF on your computer/ device.
- Click on **Open** and the PDF should now appear in the right-hand section of your EndNote library, under the paperclip icon.
- To save the changes, simply click on another reference and EndNote will prompt you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

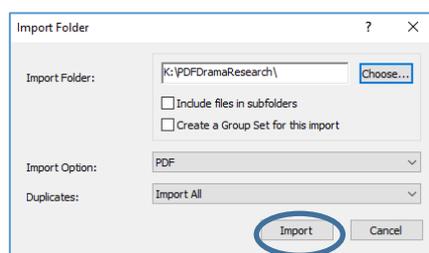
Exercise 9c: Extract reference from existing PDF

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** and select **File** (for one PDF) or **Folder** (for multiple PDFs)



- Click **Choose** and then search for those file/s on your device which you want to save to EndNote.
- Leave the defaults as they are and click on **Import**.



- EndNote will *attempt* to extract the information from the saved articles to create new references in your Library with the PDF attached.
- If the EndNote cannot extract the data, you will need to manually add the reference details from the PDF. See Section 3 on amending references for help.

Tips:

- EndNote is compatible with most of the other electronic resources to which we subscribe, see <http://hud.ac/ges> for the full list.
- You can also use it with Google Scholar <https://scholar.google.com/> although it does restrict you to importing one reference at a time. The quality of the reference will be varied, so ensure you check it for accuracy.
- For help with downloading from this and other resources, check the resource help pages or contact your Subject Librarian at library@hud.ac.uk

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

We recommend 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> (**My Files** in the left hand menu)
- Student Hub: <https://my.hud.ac.uk/> (Select **My Studies** box then **Personal Storage**)
- Via UniDesktop:
 - <https://students.hud.ac.uk/studies/it/unidesktop/>
 - <https://staff.hud.ac.uk/it/unidesktop/>

If you do need to save or move your EndNote Library on to another device (e.g. USB stick, external drive or another computer), please remember there are **two** files to copy, which will have the name of your Library.

Name	Type
 EndNote 2020.Data	File folder
 EndNote 2020	EndNote Library

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

There is also a free 'EndNote Online' product which is available over the internet and the storage is held on the suppliers' website. This can be synchronised with your EndNote desktop library and act as another back up. You can also use EndNote Online to import and manage your references if you have no access to the desktop version. See our guide on using EndNote Online at <https://library.hud.ac.uk/pages/endnote/>

Tips:

- EndNote libraries should not be saved on a cloud service, like OneDrive, Google Drive or Dropbox, 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 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 so it:

- is available on all University PCs.
- can be installed on any University-owned laptop on request.
- can be installed on your home computer, it is free for all current staff & students to download from the software purchasing page <http://hud.ac/grt> Please note that this EndNote license agreement is for academic use only, and you must uninstall the application when you graduate/leave employment of the University.
- is available via UniDesktop: <http://unidesktop.hud.ac.uk>

You can also purchase your own personal copy of EndNote just before you leave the university (from approximately £99 with a student discount) from <https://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 contact your Subject Librarian on library@hud.ac.uk

We also recommend the following websites:

- Our library web pages (including a link to this document):
<https://library.hud.ac.uk/pages/endnote/>
- EndNote training videos (via supplier's YouTube channel):
<https://www.youtube.com/user/EndNoteTraining>
- EndNote user guide (from supplier):
http://clarivate.libguides.com/endnote_training/users/enx9
- The EndNote website <https://endnote.com/> which includes a styles to download section offering 6,000 bibliographic styles <https://endnote.com/downloads/>