

1. What is EndNote and why is it useful?

EndNote is very useful for students carrying out research for a Master's or doctoral thesis. With EndNote you can create a database of references you have gathered from many different sources – library catalogues, online databases, etc. EndNote allows you to:

- store, manage and search your references in an almost unlimited number of tailor-made databases or *libraries*
- insert selected references into your paper and automatically formulate the bibliography at the end of the paper in any one of over 1000 predefined referencing styles, varying from generic styles such as Harvard or APA, to styles specific to a particular journal or publisher

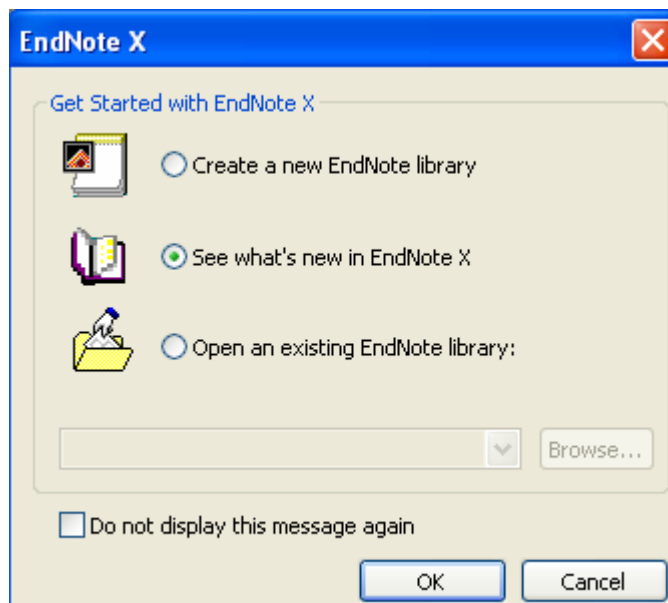
This guide is based on the way EndNote is set up on the Library PCs. EndNote is also available in CCS workstation rooms and students can buy copies for their own computers at a discounted price from the UK supplier Adept Science (see our web page <http://www.bbk.ac.uk/lib/endnote.html>)

2. Creating a database of references

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.

Opening and creating a library:

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



To create your own library:

- Select **Create a new EndNote library** and click on **OK**
- Choose a directory to save your new library to
- Give your library a name and click on **Save**

To open an existing library that you have created:

- Select **Open an existing EndNote library** and click on **OK**

- Choose the library you wish to work in by clicking on **Browse**
- Click on **OK**

Setting a default library:

Rather than have to select a library each time you open EndNote, you can choose a library to be the default library. To do this:

- Select **Edit and then Preferences**
- Select **Libraries**
- Select **Add Open Libraries**
- Select the name of your chosen default library.
- Select **OK**

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

Adding new references to your library:

You can add references into EndNote libraries in two ways

- A) Type the details in manually
- B) Import from databases and library catalogues

A. To add a new reference to your library manually:

- Select **References** and then **New**
- Choose which **Reference type** is most appropriate
- Type in the details into the appropriate sections

Note: If you add URLs e.g. for articles in electronic journals, you can then click on these later to get back to the full text

B. Importing references from databases and library catalogues

There are two ways to import references from databases and library catalogues:

- 1) **Connect** to the database or library catalogue via the EndNote search interface and download the references into an EndNote library. You can only do this if there is an EndNote connection file for the database or catalogue you want to search – many are already set up on EndNote and others can be downloaded from www.endnote.com. The connection files include COPAC, ZETOC and the British Library catalogue. On the Library PCs there is an import filter for Birkbeck Library catalogue and this can be downloaded onto your own PC from the Library web site. You can also download connection files for Birkbeck Library catalogue, the Institute of Education Library, the Wellcome Library, the British Library and others from Birkbeck Library web site <http://www.bbk.ac.uk/lib/elib/endnote>
- 2) **Search** the database or library catalogue as you normally would and then **import** the references using an EndNote import filter – many of these are already set up on EndNote and others can be downloaded from www.endnote.com. This option is best if there is no connection file for your chosen service or if you want to make use of the search interface provided by the database or catalogue – ***the interface provided by EndNote does not include many search options***

Connecting to Online Databases and catalogues via EndNote

- Choose **Tools** then on **Connect** twice
- A list of connection files will be displayed – select the one you need
- Click on the **Connect** button, on the right of the dialog box
- The EndNote Search dialog box will be displayed

- Type in your search and click on **Search**

You can select references by holding down the CTRL key and clicking on them
Click on the **Copy all references to** button at the top of the dialog box, and then enter the name of an existing Library, or create a new one.

Importing the results from searches of online databases and catalogues

Web of Knowledge databases

The easiest databases to import from are the Web of Knowledge databases. These work well with EndNote and do not require an import filter. Just click on the **Export to Reference Software** button and EndNote will ask you which library you want to save your references into.

Other databases and library catalogues

For other databases you need to save the results as a text file and then see if there is an import filter for that service.

- Click on **File**, choose **Import** and then click on **Choose File**
- Navigate to the text file you have saved
- Click on the **Import Option** drop-down menu and select the appropriate import filter

If the Import filter you need is not there. Click on **Other Filters** and you will see a list of all available filters. Other filters can be downloaded from the EndNote web site – see 2B above

3. Managing your references with EndNote

Selecting, editing and closing references:




To work with any reference it must first be selected. This can be done by clicking on the reference, or by quickly typing the first few letters of the author's name. Once selected, the reference can be opened, copied, deleted and so on.

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


To save the new data, simply close the record.

Sorting your library:

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

- Click on the **Sort Library** button  at the top of the screen
- For example, to sort by Year, change the top field to year and click on the  (descending) button to change it to  (ascending)
- Click on **Sort**

Searching your library:

- Open the Library you wish to search in and click on the  button
- Type in a word or phrase and click on Search

4. Using EndNote while writing your paper

Inserting references into your document

If you are working with Word, EndNote “add-ins” are installed into the *Tools* menu to allow you to switch between word processing your document and selecting references to insert from EndNote.

Position your cursor in your Word document where you want the citation to be 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 top menu bar:

- Select **Tools, EndNote X** and then **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.

- Select **Tools, Cite while you Write** and then **Insert Selected Citations**

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

Generating a Bibliography

To create the bibliography and format the temporary references in your document, make sure you have first selected the style from within Endnote (see above).

In your Word Document:

- Select **Tools, EndNote X** and then **Format Bibliography**
- Select the Reference style you require (see below)

EndNote will now format each citation in the text and in the bibliography.

Choosing a Referencing Style

The style you use to print out a bibliography or cite references in your paper will vary depending on the requirements of your School, or the journal to which you plan to submit your paper. Many styles are already incorporated into EndNote, including the Harvard and APA styles, and others can be imported into the Styles folder. To see the list of what's available, click on **File**, then **Output Styles** and then on **Open Style Manager**. Check the boxes against any of those you would like to use regularly.

Making changes to your document

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

- Select **Tools, EndNote X** and then **Unformat Citations**
- Make any necessary changes and then
- Select **Tools** and then **Format Bibliography**

Your paper will become formatted again.

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 machines.

5. EndNote Support

This is only a brief guide and gives an overview of EndNote. It is a sophisticated program and a lot more can be done with it. CCS have self training material on their website at <http://www.bbk.ac.uk/ccs/docs/docs.html#endnote>, also check their course timetable for upcoming training sessions <http://www.bbk.ac.uk/ccs/courses/timetable.html> You can find out more at the Endnote website (<http://www.endnote.com/>) where you can:

- Download a demo copy of the latest version of EndNote to use on trial for 30 days
- Download a user manual, tip sheets and FAQs and watch online tutorials
- Download updated connection files and filters