Guide to EndNote X7

MAC-version

University Library of Stavanger
2016
EndNote

EndNote is a reference management software package which can be used to manage bibliographies and references when writing thesis and other academic texts. References can be imported directly from library catalogues and article databases into the software. EndNote is connected to Microsoft Word, enabling you to insert citations as well as automatically create and update a literature list in your Word document. The software has many different bibliographic styles that define the appearance of your citations and literature list. With EndNote, it is possible to quickly change the bibliographic style of a text.

This guide contains what you need to get started with EndNote. For more information, go to the university library’s home page: http://www.uis.no/library/study-help/endnote/

Installing and setting up EndNote

Install EndNote from the library’s home page: http://www.uis.no/library/study-help/endnote/

Follow the instructions.

The first time you run the software, it will boot for a couple of minutes. When it is finished booting, do the following:

- Go to File > New…
- Select where you want to save your EndNote library
- Name your library
- Select the option called “Save as package”
- Click “Save and Close”

We recommend having just one library. Problems may occur if you cite from different libraries in one Word-document.

Instead of having several libraries, you can create groups in your library, or tag each reference to distinguish between subjects. This will make it easy to search for subjects within your library.
Glossary

**Reference**: information on an article, a book, a web page and so forth.

**Library**: your database of references.

**Import files**: files used to import references from databases (Web of Science, Compendex and so forth).

**Output Styles**: bibliographic styles which define the appearance of citations and literature lists.

**Term Lists**: index files / word lists for authors, journals and tags which maintains correct spelling in your library.

Your library

EndNote should always be opened from DOCK, and not via Word.

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You can use groups to sort references by subject or study.
Modes

It is possible to work in three different modes in EndNote. A new library will open in local mode. We recommend using local mode.

If you were to use Online search mode, you could search and retrieve references from EndNote and save them in a temporary library. Instead of doing this, we would recommend that you go to ORIA or to online databases to import your references. See page 15 in this manual for information on how to do this.

Style

To select in which bibliographic style you wish EndNote to display your references, choose from the dropdown menu in the top left corner.

Display fields

You can choose how many information fields EndNote displays in the library window and determine the order in which they are shown. Go to EndNote x7 – Preferences – Display fields.

Rating

Here you can rate your references by giving them 1 to 5 stars.

Layout

Your EndNote library window contains several panels, which display information. By clicking the Layout button, you can change their orientation and placement as you see fit.
You can decide if you want the help screens on the left, right or bottom of the library window.

PDF (…) will display any attached PDFs in full text.
Split will display the reference in full and an overview of any PDF.
Preview will display the reference as it will appear in your literature list.

Clicking the paperclip icon attaches documents to your reference.
Clicking the icon displaying a window with arrow opens the PDF.

References

Endnote sorts your references alphabetically. You can view and edit each reference by double-clicking on them or hitting Enter when they are highlighted.
An example of a reference:

Change case

If the title of a reference is imported in capital letters, this can be fixed by highlighting the title and clicking the Change case icon.

Some words and abbreviations should always be written in capital letters. To create a list of words which EndNote will be forbidden to change the case of, go to EndNote X7 → Preferences → Change Case.
Adding references manually

- Open your EndNote library.
- Go to References – New Reference.
- Choose the correct reference type:
  
  - **Book** for a book or a report written by one or several authors.
  - **Book section** for a chapter in a book or articles from a conference.
  - **Edited book** for edited books (anthologies).
  - **Electronic Book / Article** for documents found online or in a full text database.
  - **Journal Article** for printed journal articles.
  - **Web Page** for other materials found online.

There are many different types of references in EndNote. You can change the reference type after saving a reference.

Press the Tab key and Shift + Tab to go up and down between the fields in the reference. Press the Enter key to make a new line. Do not use full stops and do not leave empty lines.

**Author**: must be written in inverted form: Olsen, Per
If a reference has several authors, write each name on a separate line by pressing the Enter key.
Always write names in full. EndNote will automatically change the first name to initials, according to the demands of the chosen reference style.
New names appear in red:
Be sure that you always write an author’s name correctly.

**Organization as author:** for example Universitetet i Stavanger.
When entering the name of an organization you will need to add a comma after the last letter. If you do not do this, EndNote will write the organization name as the name of a person: Stavanger, Universitetet i.

**Title:** write the title without punctuation, but use colon to separate between main and subtitle.
For example Marketing research: an applied orientation

**Journal:** write the title of the journal in full. Pay attention to the letter case.

**Pages:** write the page number in full (1442-1449) or shortened (1442-9). Do not write p. or s. EndNote will do this according to the chosen reference style.

**Label:** use this field to refer to your own archival system, folders and so forth.

**Keywords:** keywords, subject words. These will be searchable.

**Abstract:** a summary of the article written by yourself or imported along with the rest of the reference.

**Notes:** use this field, as well as Research notes, to add personal notes to the reference.

**DOI:** Digital Object Identifier (see p. 12)

**URL:** Internet address of the document.
**File attachments:** attached files like PDFs and Word files, which are part of your library. The files are stored in your library. Anything stored as a PDF is searchable.

You can use your library's search panel to search for PDF files.

Some fields are mandatory for a complete reference

**Mandatory fields for book references:**  
Author, title, year of publication, publisher, place of publication.  
If the book has several publishers, choose the first one. The also applies to place of publication.  
If a book has several editions, you need to write which one you are using, for example 2\textsuperscript{nd}, 4\textsuperscript{th} and so forth.

**Example (APA 6\textsuperscript{th}. From Kildekompasset):**

**Book with one author**

**In the text**  
Author, publishing year, page. (Sødal, 2008, p. 53)

**In the reference list**  
Author. (year). Title in italics. City: Publisher.


**In EndNote**  
Add as "book".

Fill out the fields Author, Year, Title, City and Publisher.
**Mandatory fields for article references:**
Title and author of the article, journal name, volume, issue and page numbers.

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**Example (APA 6th. From Kildekompasset):**

**Journal article with one author**

**In the text**
Author, year, page (Fredwall, 2004, p. 235)

**In the reference list**


*In this example information on volume is missing and is not given in the reference.*

**In EndNote**
Add as "Journal article"

*Fill out the fields Author, Year, Title, Journal, Volume, Issue, Pages.*

**Chapter in edited book**

**In the text**
Author, year, page (Haakdal, 2010, p. 174)

**In the reference list**


**In EndNote**
Add as "Book section".

*Fill out the fields Author, Year, Title, Editor, Book title, City, Publisher, Pages.*
**Mandatory fields for web documents:**
Title and author, year of publication, web address (URL), retrieval date and the latest update date.

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**Example (APA 6th. From Kildekompasset):**

**Website**

**In the text**
Author, year (Hidle, 2011)

**In the reference list**
Author. (year). Title in italics. Retrieved [date] from URL


**In EndNote**
Add as "Web page".

Fill out the fields Author, Year, title, Access year, Access date, URL.

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**Making references of electronic sources**

Electronic sources can be articles, blogs, e-mail groups, databases, newspapers, web pages and so forth.

Minimum requirements for referencing a web document are title or description, date (publication or latest update), access date and URL. Include the author’s name if you can find it.

Always make a copy (paper or electronic) of any web pages you use, and save it. Web pages may change or disappear. This does not apply to scientific articles, laws and other public documents.

**Referencing web pages**

Choose the reference type Web Page. In the Year-field, only enter the year when the page was latest updated. In the Access Date-field, enter the whole date for when you accessed the page. Be consistent with the date format. We recommend YYYY.MM.DD. For the example below, the access date was 2012.11.22.
The reference in APA 6th-norwegian:


Referencing electronic articles in EndNote

Electronic articles from journals that are also available in print, can be entered as printed articles (Journal Article). After the title you can write [Electronic version] in square brackets (recommended for APA).

If the article is only available electronically, or that the electronic version is different from the printed version, or if there is no page numbers, you must enter the article as an electronic article.

URL and DOI

The URLs are the most important part of the reference. If they do not work, the reader will not be able to locate the referred document. A typing error can make the link useless. The web page can be changed or removed. Please note that links to the library’s full text databases are temporary URLs, which will not work the second time you use them.
Many of the library’s databases have a DOI (Digital Object Identifier). A DOI is a standard for identifying intellectual property in a digital network, for instance in a database. It consists of a string of numbers that unambiguously identify an electronic document online. In the database’s article description, it might look like this: DOI: 10.1007/s005310050186.

If you write http://dx.doi.org/ in front of the DOI-numbers, a web browser can locate the article.

The link then looks like this: http://dx.doi.org/10.1007/s005310050186. Use this type of URL in your EndNote reference to lead the reader to the specific article, and not just the database where the article is located.

Referencing official documents in EndNote

There are no set rules for citing official publications. Different study fields have their own ways of doing things and the bibliographical styles (like APA and Chicago) may have their own rules. Here you will find some examples on how to solve this problem.

NOU and reports to Stortinget

You can choose between the document type Book or Government Document. A main rule in EndNote is to put a comma at the end of what you write in the Author-field when you are referencing official documents. This makes EndNote understand that what you have written is not a personal name.

In this example, the report to Stortinget has the reference type Book:
In this example, the NOU has the reference type Government Document. With this reference type, you have the possibility of entering a URL:

![Government Document](image)

<table>
<thead>
<tr>
<th>Author</th>
<th>NOU (2012:1), Øst, Kjell Erik</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Til barnets beste: ny lovgivning for barnehagene</td>
</tr>
<tr>
<td>Department</td>
<td>Kunnskapsdepartementet</td>
</tr>
<tr>
<td>Place Published</td>
<td>Oslo</td>
</tr>
</tbody>
</table>

Laws

You can choose between the document types Legal rule or regulation or Book. Write the law's short title is written in the Author field. If you want to cite a specific paragraph of the law, use Edit & Manage Citation(s) in Word to enter the paragraph.

![Book](image)

<table>
<thead>
<tr>
<th>Author</th>
<th>Arbeidsmiljøloven</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year</td>
<td>2014</td>
</tr>
<tr>
<td>Title</td>
<td>Lov om arbeidsmiljø, arbeidstid og stillingsvern mv.</td>
</tr>
<tr>
<td>Place Published</td>
<td>Oslo</td>
</tr>
<tr>
<td>Publisher</td>
<td>Gyldendal Arbeidsliv</td>
</tr>
</tbody>
</table>
Exporting references from databases and library catalogues to EndNote

Remember that references that you export from databases may contain flaws, deficiencies or unnecessary information.

ALWAYS remember to edit your references after importing them:

- Choose the correct reference type
- Check that all the information is correct and in the right field
- Remove or add keywords.

References are places temporarily in the folder “Imported references” in EndNote. This makes it easy to remember to edit the references.

**NB!** References you import into EndNote on your Mac are automatically sent to «Downloads». Do like this to open them in EndNote:

- Open Downloads
- Double-click the file you want to import
- Edit the reference in EndNote.

**ORIA**

- Search the database
- Click Locations or Details on the post you want to export
- Click Actions, and choose EndNote on the dropdown menu
- A new window will open:
• Click OK
• Open Downloads
• Double-click the file you want to import
• Edit the reference in EndNote.

In ORIA you can export several references simultaneously:

• Search the database
• Select the references you want to export by clicking the star.

• Go to “e-Shelf” at the very top of the page
• In the dropdown menu “Select how to save”, select Push to EndNote and click Go:

Save and import the references as you would a single reference.

EBSCO – Academic Search Premier, Cinahl, Eric, SocIndex et cetera.

• Search the database

• Select the references by clicking
• A list of the selected references will appear on the right. Click on “Folder View”
• Select the references you want to export

• Click Export (on the right)
• Select Direct Export in RIS Format
• Click Save
• Open downloads
• Double-click the file you want to import
• Edit the reference in EndNote

Web of Science

• Search the database
• Select the references you want to export

• Click Save to EndNote desktop (not Save to EndNote online)
• Click Send
• Open downloads
• Double-click the file you want to import
• Edit the reference in EndNote

OnePetro

• Search the database
• Select the references you want to export
• Select Export marked citations at the top of the page

• Choose Reference manager (RIS)
• Open downloads


- Double-click the file you want to import
- Edit the reference in EndNote

**N.B.** Unfortunately OnePetro does not function optimally with EndNote, so you will need to edit the references. A number of important fields will be missing, like year, journal title, volume, issue and article page number. It is important that you add this information to ensure that your reference is correct!

**Google Scholar**

Before starting your search, go to settings on the start page.

Go to Bibliography manager, check the box called “Show links to import citations into” and then choose EndNote from the dropdown menu.

**Administering your library’s references**

**Groups**

You can use groups to sort references by subject or study field. Groups make it easier to keep track of your library’s references. A reference may be linked to several groups. Even though a reference is linked to a group, you will still find it in All References.

**How to make a group**

- Go to Groups – Create Group
- Type in your new group’s name
• Go to All References
• Click and drag the desired references into your new group

To delete a group, go to Groups – Delete Group. If you want to make a new group from a combination of several groups, go to Groups – Create from Groups. It is not yet possible to create subgroups in a hierarchy.

**Smart groups**
Smart groups enable you to create groups to which references are added automatically.

**How to make a smart group:**

• Go to Groups – Create Smart Group
• Type in your new smart group’s name
• Type in a search, for instance an author’s name or a keyword
• Click Create

When you import references after creating a smart group in this way, all references that contain the smart group’s search information will be added to the smart group.

**Searching your EndNote library**

The easiest way of searching your library is to type your search into the search bar:

If your library has many references, you may want advanced search options. Go to Tools – Search Library. Among other things, you can search references by the date they were added to the library.

You can also search within your library’s PDFs.
Finding full text (PDF) for a reference

Select the references you want to find full text to (select more than one by pressing and holding the shift button).

Click the Find Full Text-icon in the toolbar:  
EndNote will now search available publications for full text documents.

A search group will appear in the left column to indicate that the search has started. A paperclip icon will appear next to the references that have PDFs. To read the PDF: click once on the reference.

If your screen layout is set to Right – PDF, click the arrow on the right to view additional PDF tools.

Click the icon Open PDF to read the article in full screen mode.  
Click Annotate toolbar to add notes and/or highlight text in the PDF file.  
Click Attach File to manually add PDF files to a reference.

Please note that EndNote will be unable to find full text for all references.

Editing references

- Double-click a reference
- Make your changes and save by closing the window or Cmd + S
Copying references

This function is useful for referencing multiple articles from the same book or journal.

- Select a reference by clicking it once
- Cmd + C to copy the reference
- Cmd + V to paste the copied reference
- Double-click the copied reference to edit

Deleting references

Select the reference you want to delete, and click Delete. Deleted references are moved to the Trash folder in the left column. To empty the trash right-click and select Empty Trash.

NB! Do not delete references after citing them in a Word document.

Remove duplicates

To avoid having duplicates in your library, take care that Discard Duplicates is always selected when you import references.

If you suspect you have duplicates in your library, you can search for them by going to References – Find Duplicates.
Click Keep This Record on the reference you want to keep. The earliest added reference is always on the left. It is best to keep this one, in case you have cited it in a document.

Sorting

By default, your EndNote library is sorted by author name, but you can choose to sort it by any other field (title, year and so forth). The easiest way to sort your references is to click on the field name at the top of the reference window. If you click on Year, all references will be sorted by year.

Word and EndNote: Cite while you write

EndNote works together with Word so that you can add references from your library as citations in your text. A literature list will automatically be created and continually updated.

EndNote has thousands of citation and literature list styles to choose from.

After installing EndNote on your Mac, you should see an EndNote bar when you open Word. This is the toolbar for controlling EndNote in conjunction with Word. (If you cannot see the EndNote bar, go to View – Toolbars in Word.)
EndNote toolbar:

![EndNote toolbar](image)

Inserting a reference as citation

- Open Word
- Place the marker in the text where you want the citation
- Click the Insert Citation icon
- Search for the author you want to cite
- Click Insert
- If you want to see all of your references, type “a” and hit Search

Deleting citations in Word

You can delete citations just as you would delete text in your Word document, by pressing the delete or backspace key. The citation will then be deleted from the text and the literature list, unless you have used it elsewhere in the text.

Removing the author’s name/year

When the author’s name is mentioned in the text, you are often required to not include the author’s name in the citation. Sometimes you may be required to remove the year.

- Choose either Insert & Exclude Author or Insert & Exclude Year. Do not remove them both, because this will make it hard to find the citation.
Adding page numbers to a citation

- Go to Edit & Manage Citation(s)
- Select the citation in question
- Type in the page number in the field Pages: 45 or 49-59.

Take care to always include page numbers when using direct quotes (word for word) and indirect quotes (rewording/paraphrasing). This is important to enable the reader to quickly locate and assess the source and your use of it. Openness and accountability when using sources are cornerstones of academic work, and the use of accurate references is a means to this end.

Quick editing of references in your library

It is not necessary to go back to EndNote to edit a reference. Highlight the reference you wish to edit in your Word document. Go to Tools – Edit Library Reference.
You will be transported to the reference in EndNote, where you can make the necessary changes. Save the reference when you are done. Go back to Word.

Then go to Bibliography – Update Citations and Bibliography.

How to change the output style of references in a Word document

Go to Select another style:

You can also change the output style via EndNote:

Click on this button to go directly to EndNote:

- Go to Edit – Output Style
• The styles are arranged in alphabetical order. Go to Open style manager to find styles for different disciplines
• Select the style of your preference
• Select the red cross to save

• Click this icon to go back to Word:
• Locate the new style from the dropdown menu:

• Select the style
How to cite several authors simultaneously

When referring to two (or more) documents simultaneously, the citations need to be in the same parenthesis. Go to Word.

- Select the place in the text where you want the reference to be
- Go to Insert Citation
- Type “a” in the search field
- Select the first reference
- Click on Insert
- Select the next reference and click on Insert
- Both of the references should now be in one parenthesis

Moving text

It is a good idea to turn off formatting if you are going to make significant changes in your document, such as moving paragraphs or pasting in text from other documents.

What to do before moving text:

- Open the Word document
- Go to tools on the EndNote toolbar, and select Convert to Unformatted Citations
You do not need to turn off formatting for the entire document, it is sufficient to only turn it off for the paragraph you want to move. To do this, highlight the desired paragraph before converting to unformatted citations. This will make the citations look like this: (Åmås, 2008 #878).

- Move the text or make the changes you want
- Go to Bibliography – Update Citations and Bibliography to make the citations look correct
- Finally, turn on the formatting again (see below)

It is a good idea to turn off formatting regularly, also when you are not moving text. This is especially important when working with large documents. This will ensure that the connection between EndNote and Word functions properly.

**Turn on formatting**

If your citations look strange or cryptic (Åmås, 2008 #878), the formatting is switched off.

To turn it on:

- Go to Bibliography on the EndNote toolbar
- Click on Turn Instant Formatting On

**Removing the connection between EndNote and Word before turning in your paper**

Use this function to make a copy of your document which does not contain CWYW field codes. The connection between EndNote and Word is removed in this copy. When the field codes are removed you can make the final adjustments in the literature list and the citations.

- Open the Word document
- Go to Tools on the EndNote toolbar
- Click on Convert to Plain Text

NB! A notification will appear, letting you know that a copy is created, but not yet saved. Click OK and save the copy with a file name indicating that this is a document with no connection to EndNote. The copy is a normal Word file. The original document, which is connected to EndNote, remains intact.
How to make an independent bibliography or literature list (for instance for a curriculum)

- Open EndNote
- Choose the style you want your list to have
- Select the references you want to feature in your list. Command + A selects the entire library, holding Command selects single references
- Go to Edit – Copy formatted
- Go to the Word document and press Command + V to paste the references

Working on several computers

If you wish to work on your EndNote library and Word documents on several computers, you have to save all the EndNote files on an external drive or in a cloud service like Dropbox or iCloud.

You can also create an account in EndNote Online.

EndNote Online

EndNote Online is a good option when working with several writers and several computers. EndNote Online will synchronize with EndNote Desktop.

You can share your groups and folders with other people if they have an account in EndNote Online:

- Open EndNote Desktop
- Go to “Organize” at the top of the screen
- Go to “Manage my Groups”
- Choose the group you want to share and click “Manage Sharing”
- Click “Start sharing this group”
- Type in the e-mail address of the people you want to share the group with
• Choose if you want this person to have access to “Read only” or “Read & write”
• Click “Apply”

You can create an account in EndNote Online here: [http://www.myendnoteweb.com/](http://www.myendnoteweb.com/)

Problems with EndNote?

If you are experiencing problems when using EndNote, do not hesitate to reach us!

E-mail: [ub@uis.no](mailto:ub@uis.no)

Phone: 51 83 11 00