EndNote – Beyond the Basics

These notes assume that you know EndNote basics and are using it regularly. Additional tips and instruction is contained within the **guides** and **FAQs** available on the IOE website at libguides.ioe.ac.uk/content.php?pid=312099&sid=2554561.

Please note that some of the customised options such as **creating your own output styles** are possible on the student network but you will need to create a new folder location for EndNote to work with (see below). Similarly changes to any EndNote **preferences** will not be retained when you log off the network.

We would generally advise creating a **copy** of an output style to modify and retaining the original for comparison.

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Suggestions

1. Adding references to your library.

2. Adding and changing data in your library.

3. Modifying reference types.

4. Searching your library.

5. Keywording.

6. Independent bibliographies.

7. Working with output styles.

8. Adding record numbers to a printed list or bibliography.

9. Adding sequential numbers to a printed list or bibliography.

10. Dividing a bibliography into categories.

11. Adding an abstract to an output style.

12. Working with journal abbreviations.

Solutions

1. **Adding references to your library.**

There are four main ways of getting references into your library –

- **Manual entry** – typing or cutting and pasting data directly into the relevant reference fields.
- **Automatic PDF import –** EndNote X4/X5/X6 include an option to import your existing PDFs to create new references with attached searchable full text documents. Select **File > Import** from the on screen drop-down menu top-left. The PDFs must include a **digital object identifier (DOI)** number to accurately create the reference. Older or scanned PDFs will not work but will be attached to a 'blank' reference.
- **Automatic search and import** – using EndNote's inbuilt connection files to search remote resources (particularly library catalogues) and import your results directly into EndNote. Resources that offer this option include –

  IOE Library Catalogue
  Birkbeck Library Catalogue
  British Library Catalogue
  Library of Congress
  Senate House Library Catalogue
  SOAS Library Catalogue

  There are literally thousands of possible connections but only a limited number will actually be 'publicly' accessible.
- **Automatic search and export** – conducting a search on a journal publisher site or database and exporting your results directly to EndNote. Resources that offer this option include –

  BEI/ERIC/AEI via ProQuest
  IBSS/ASSIA (and many others) via ProQuest
  Web of Science
  Google Scholar
  Jstor Journals
  Sage Journals
  ScienceDirect Journals
  SwetsWise Journals
  Taylor and Francis Journals
  Wiley Journals

  In general when reviewing your results in a given resource look for an 'export to bibliographic software' option or similar. Virtually **every** electronic resource now offers some sort of automated method of transferring references to EndNote. More guidance is also given in our individual database guides on the web at libguides.ioe.ac.uk/databases.

- **Automatic search and import using filter** – conducting a search on a journal publisher site or database and importing your results directly into EndNote with the relevant filter. This option can be used where a direct export option is unavailable.

  When reviewing your results in a given resource save them as a text file (full format) and then import that file into EndNote using the appropriate filter for that resource. More guidance is also given in our individual database guides on the web at libguides.ioe.ac.uk/databases.

See our **LibGuide** for the best methods for transferring references from individual resources into EndNote - libguides.ioe.ac.uk/content.php?pid=312099&sid=2554558.

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2. Adding and changing data in your library.

You can edit any reference individually and a 'search' and 'replace' function is available via **Edit> Change text** (or **Edit> Find and Replace** in **X6**) This can be applied to a group or sub-set of references.

You can insert extra text into particular fields using the 'change and move fields' command available via **Tools> Change and Move Fields** (or **Tools> Change/Move/Copy Fields**). This can be useful for adding additional notes to a subset of references**.**

Use the **References> Show/Hide Selected** command for a more precise display of particular sets or subsets of references

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3. Modifying reference types.

You can add, delete or rename fields within a reference type. This can be useful when adding your own custom named fields or editing existing ones.

Note: Any field modifications will apply to all new and existing references in your library but these preference changes will only apply to **your own** EndNote installation.

Also if you require a given output styles to use these newly modified fields, the style will have to be edited accordingly to reference these fields

- Select **Edit> Preferences> Reference Types**.
- Use the dropdown to display the reference type you wish to modify and click on **Modify Reference Types**.
- Click into your chosen field and make your modification.
- **Note**: You may not be able to click directly into the **Generic** field but can select it using the arrow keys.
- Click on **Apply to All Ref Types** to add the new field to all available reference types or **ok** to just apply to the selected reference type.
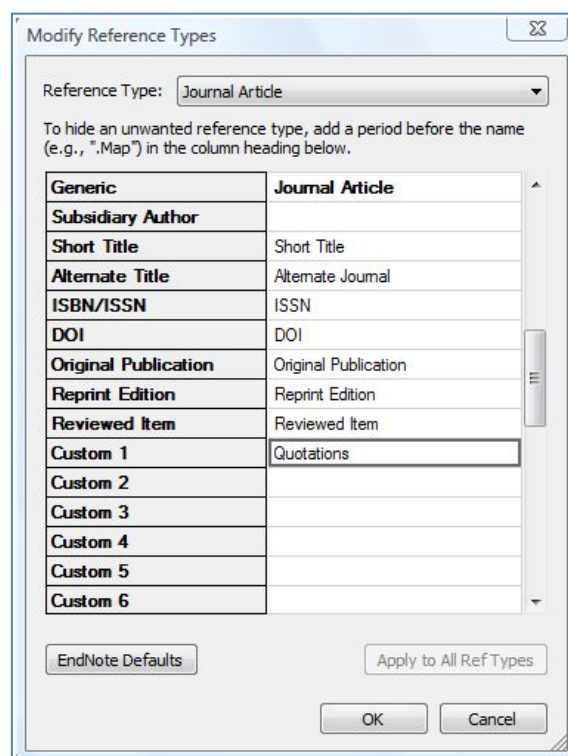
4. Searching your library.

The search function allows relatively sophisticated combination or 'boolean' searches using AND, OR, NOT. You can add more default search boxes and search either the whole library or a subset of references ('**search showing references**') using the options tab on the search window.

Remember you can also opt to search your attached PDFs and even your annotations within them.

5. Keywording.

You can apply your keywords to individual references or a subset of references automatically using the '**Change and Move Fields**' (**Change/Move/Copy Fields** in X6**)** command. It makes sense to use the default 'keywords' field but the 'notes' field could also be used. You may want to delete any keywords automatically downloaded from a database to avoid confusion or simply enhance them with your own.

Keywords should be entered one per line or separated by a comma, semicolon or similar. EndNote will helpfully keep track of all keywords used with a '**term list**' and prompt you to enter a given term when required. This listing (and others including **authors** and **journals**) can be viewed via **Tools> Open Term Lists** and edited and exported as required.
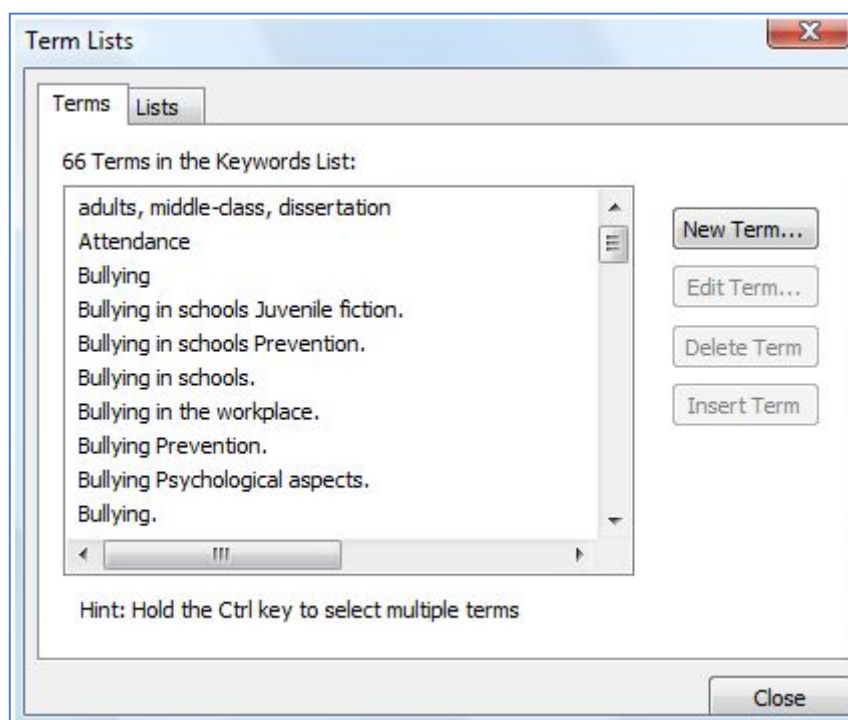
You can define term lists for any given field you choose by using the **Tools> Define Term Lists** command in conjunction with the **Link Term List** command. You could for example, **import** an existing list of keywords to index your references. Any data you subsequently add to your defined fields will appear in that field's term list.

The keyword field is of course fully searchable allowing quick and easy retrieval of related references to better organise your library.

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6. Independent bibliographies.

You can create a independent bibliography using any of these methods –

- Choose the appropriate style and then copy and paste **formatted** references into a Word document using the **Edit> Copy Formatted** command.
- Export references in rich text format to another programme using the **File> Export** command.
- Choose the appropriate style and then print either your full library or a subset of 'selected references' using the **File> Print** command.

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7. Working with output styles.

EndNote comes with thousands of preconfigured output styles to apply a specific bibliographic format to your references. The IOE has a house style edited to conform with the Institute's agreed style guidelines. Check with your tutor if you are unsure which style to use.

However you can create your own style if required –

- Firstly choose an existing style as **close as possible** to what you need.
- Choose **Edit> Output Styles> Edit 'Your chosen style'** and then save and rename a **copy** of the style so preserving the original. You will have to select an alternative location to save the style if working on the student network.
- You can now edit each element of the style for each reference type in the left hand window pane. You can for example change the citation format, add punctuation, capitalisation, edit author lists and change the default sort order.
- Editing the individual reference template syntax to format what data appears in the bibliography is trickier. See **Modifying Style Templates** accessed via the **Help** link (top left) within your library.
- Additional formatting changes can be achieved via the **Bibliography> Layout** option under the **EndNote tab** in Word.
- You can also of course use the **Convert Citations and Bibliography> Convert to Plain Text** command to create a **plain text copy** of your document if you want to make simple edits to the final copy.

If you customise or maintain your own listing of EndNote's preconfigured styles or connection files, you can of course save these copies to the default folders or choose your own location. Simply point EndNote to the new folder location via **Edit> Preferences> Folder Locations**.

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8. Adding record numbers to a printed list or bibliography.

It is sometimes useful to have a printed list of references including their unique EndNote record numbers, particularly if you're working from home without access to EndNote. You can then simply add temporary in-text citation markers eg. {Welshman, 2010 #50} where the **# number** represents the unique reference number for each reference. You can then **reformat** the document when you have access to EndNote again to automatically generate the bibliography with these new entries.

- Choose **Edit> Output Styles> Edit 'Your chosen style'**.
- Click on **Bibliography> Layout** in the left hand window pane.
- Choose either 'start each reference with' or 'end each reference with' and type 'Record No.' or similar into that field.
- Choose **Insert Field** and select **Record Number** from the dropdown including any spacing required after inserting.

You can then use this style to create an independent bibliography (as above) that now includes record numbers.

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9. Adding sequential numbers to a printed list or bibliography.

You can obviously use the EndNote **Numbered** style to produce a numbered list but this might not be the style you want. To edit your chosen style repeat the steps above but choose **Insert Field** and select **Bibliography Number** from the dropdown instead.

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10. Dividing a bibliography into categories.

There are two ways of doing this depending upon whether you need a quick instant subject bibliography generated from the library reference window or an output style that will automatically format the references this way every time. In both examples we wish to divide the bibliography into '**Published**'
 and '**Unpublished**' sources.

Method 1

The **subject bibliography** command offers a variety of formatting and sorting options which will cover most scenarios.

- Firstly decide on your categories and **assign** these to the **label** field e.g. 'Published' and 'Unpublished'.
- You can set up **term lists** linked to the **label** field (see **5** above) to ensure consistency or use the **change field** command (see **2** above) to add the categories to the **label** field of multiple references.
- You can also use your own customised fields (see **3** above).
- Use the **References> Show/Hide Selected** command to select the references required in the bibliography.
- Select **Tools> Subject Bibliography** to display the field selection window, click on those **fields** you wish to include and click on **ok**.
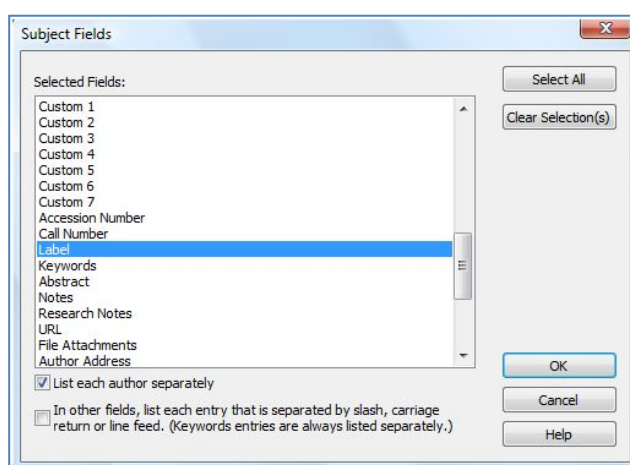
- Select those **terms** you wish to include and click on **ok**.
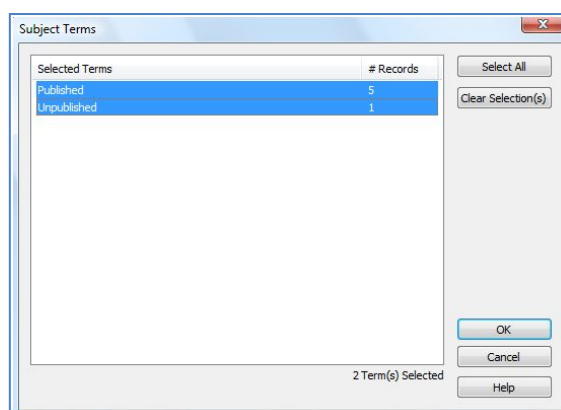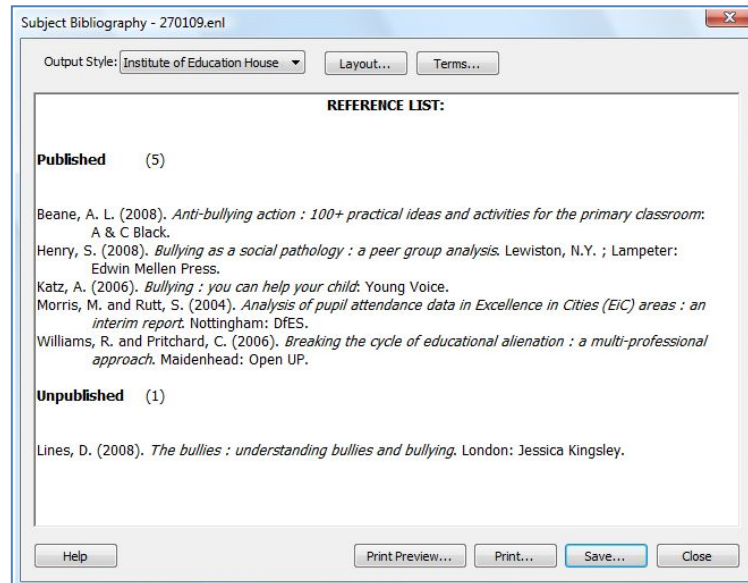
- Change the **Output Style** using the dropdown list if required and the **sort order** and other **reference list** options using the **layout** tab. You can redefine your terms list using the **Terms** tab.

Method 2

You can edit a given output style to sort the bibliography in whatever order you stipulate to for example, differentiate between published and unpublished sources. You simply define a category term in a suitable field in each of your references and then sort on that term.

- Choose **Edit> Output Styles> Edit 'Your chosen style'**.
- Click on **Bibliography> Sort Order** in the left hand window pane.
- Check the button labeled **Other** and select the fields on which to sort.
- In this example we are using the **label** field for our categories.
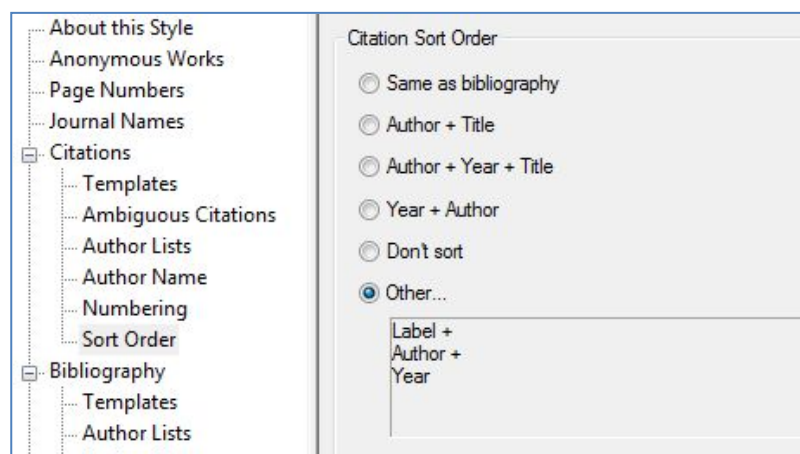
- Decide on your categories and **assign a number** to each, to determine the order in which the categories will appear in the bibliography, e.g.

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1. Published
2. Unpublished

- You can set up **term lists** linked to the **label** field (see **5** above) to ensure consistency or use the **change field** command (see **2** above) to add the categories to the **label** field of multiple references.
- You can also use your own customised fields (see **3** above).
- Use the **References> Show/Hide Selected** command to select the references required in the bibliography.
- When EndNote generates the bibliography, the references will appear as a **single list** but grouped according to the categories specified.
- Create a plain text copy of the document using **Covert Citations and Bibliography> Convert to Plain text** to insert some blank lines between each category and add an appropriate heading to each group.

11. Adding an abstract to an output style House Style.

You can use the EndNote **Annotated** style to include the abstract but this might not be the style you want. To edit your chosen style repeat the steps in **8** above but choose **Insert Field** and select **Abstract** from the dropdown instead in conjunction with the **Paragraph** and **Tab** options to get the look you require.

Alternatively modify each reference template to include the particular additional fields you want (see above).

12. Working with journal abbreviations.

EndNote copes with the problem of journal abbreviations by means of **term lists**. It allows you to store not only the titles of all the journals which appear in your EndNote library, but also up to three different abbreviations for each of those titles. You can use the predefined lists supplied as plain text files or create and import your own.

- Select **Tools> Open Term Lists**.
- Click on the Lists tab, highlight the Journals list and click on 'import list'.
- In the file dialog, navigate to the **EndNote\Terms Lists folder** (predefined) or select the list you want to use, and click 'open' to import the journal names and abbreviations from the file into the journals term list.
- You will have to make sure that your chosen output style is configured to select the correct column in that list.
- Click on **Edit> Output Styles> Edit 'Your chosen style'**
- Click on **Journal Names** in the left hand window pane and make your selections as appropriate.

13. Adding 'value' to your library.

EndNote can be seen much more as a research repository rather than as a simple but effective referencing tool. These options may help you to maximize the usefulness of the database –

- You can use the default **notes**, **research notes** and **abstract** fields to add your own comments and quotes and create additional custom fields for your references (see **3 above**).
- Import your existing PDFs to create new references with attached searchable full text documents. Select **File > Import** from the on screen drop-down menu top-left (**EndNote X4** onwards). The PDFs must contain a **digital object identifier (DOI) number** to create the reference. Older PDFs or scanned copies will **not** do this but this will be attached to a 'blank' reference.
- Cut and paste full text documents/figures/photos into the file attachments field. These files 'travel' with the library and are accessible wherever it is opened. Libraries are of course completely portable and can be saved, emailed and copied like any other file.
- The **URL** field can be used to link to any website(s) providing useful cross-references between resources.
- **Endnote X4** onwards offers greatly enhanced integration with **EndNote Web** allowing the seamless transfer of references between desktop and web applications. You can then open up your web-based library to colleagues for better and easier collaboration.
- **EndNote X6** finally offers true synchronisation between web and desktop and you can use this method or other tools such as **Windows Live Mesh** to automatically synchronise data on different machines and keep your library up to date.

You can of course save a back-up of your library using the **File> Compressed Library (.enlx)…** command. This ensures are your attachments and enhancements are preserved and can be 'unbundled' at any time. This is also the best method for emailing libraries.

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14. Library statistics.

We **strongly** recommend that you only maintain **one** EndNote library to avoid problems of duplication and overlap. Effective **keywording** and **grouping** will help prevent the library becoming unwieldy and there are a number of additional statistical tools that can help you keep track of things –

- Use the **References> Record Summary** command to view when a record was added/updated/the number of fields used etc. Right-clicking on a reference will also display this information.
- Use the **Tools> Library Summary** command to view a comprehensive list of statistical information about your library.

With both options the information can be copied and saved elsewhere for analysis/record keeping etc.

Help and advice

For further sources of information please see -

- EndNote's inbuilt help function accessible via the onscreen menu.
- The complete user manual provided with the software.
- Our new **LibGuide** on the web - libguides.ioe.ac.uk/endnote.
- Library staff at lib.enquiries@ioe.ac.uk.
- EndNote technical support staff - www.adeptscience.co.uk/kb/.

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For further eLibrary Resource Guides see www.ioe.ac.uk/library/guides