

# EndNote X3 (an introduction)



MONASH University  
Library

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# **EndNote X3 introduction**

## The advantages of EndNote

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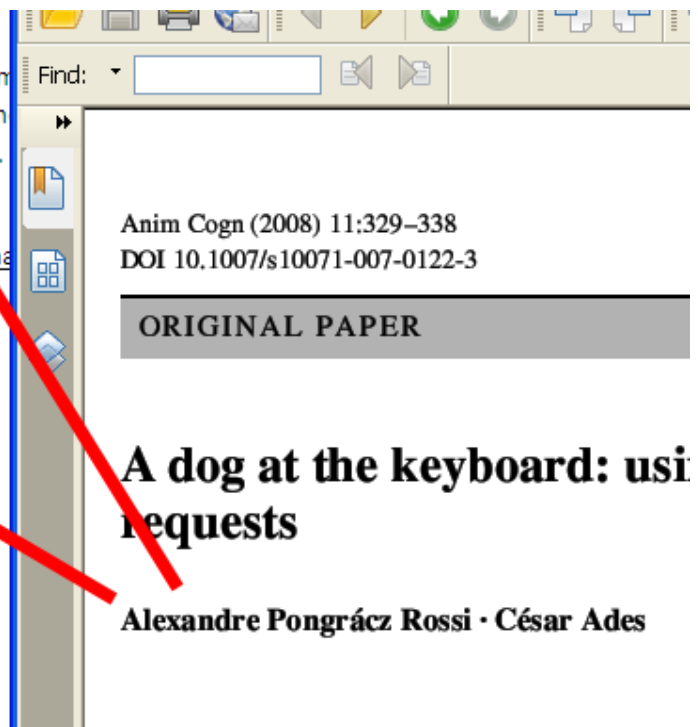
What does EndNote do?

### Keeping track of references and formatting

Although communication with the great apes has been attempted, less work has been done communicating in this way with other primates. This has been attempted with a domestic dog (Rossi and Cesar 2008).

#### References

Rossi, A. and A. Cesar (2008). "A dog at the keyboard." *Anim Cogn*



Find:

Anim Cogn (2008) 11:329–338  
DOI 10.1007/s10071-007-0122-3

**ORIGINAL PAPER**

**A dog at the keyboard: user requests**

Alexandre Pongrácz Rossi · César Ades

When you cite a reference for the first time in your work, you know that you have to dig out the details of the original reference, enter the in-text citation into your text, and add a full entry into the list of references at the end of the work, using appropriate punctuation and formatting.

EndNote can reduce a lot of the effort involved in this process.

## Simple data entry

**Rossi, 2008 #1 (My EndNote Library.enl)**

Reference Type: Journal Article

Author  
Rossi, AP  
Cesar, Ades

Year  
2008

Title  
A dog at the keyboard

Journal  
Animal Cognition

Volume  
11

Issue

Added to Library: 3/08/2009 Last Updated: 3/08/2009

EndNote enables you to enter your reference details in a simple fill-in-the-fields fashion.

## Create a "library" of references

0	Author	Year	Title ▲
	Fargo	1963	The archetypal cat
	Rossi	2008	A dog at the keyboard
	Monash Univ...	2009	EndNote advanced: Tips at
	Melbourne P...	2009	Graphics SIG
	Foot	2006	The rise of the pumpkin
	Brown	1999	Savagery in the blue tit

By entering each work you will be citing you create a "library" of references in EndNote.

Although communication with the great apes has been attempted using a simple keyboard, less work has been done communicating with other mammals (Rossi & Cesar, 2008).

Fortunately, recent research (Melbourne PC User Group, 2009) into animal psychology (Brown, Black, Greene, Scarlett, & White, 1999) has made this easier (Monash University Library, 2009, pp. 23-24).

## References

Brown, M., Black, B., Greene, F., Scarlett, W., & White, B. (1999). Savagery in the blue tit. *Feather and Wattle*, 3(2), 2-9. doi:10.1163/156853907780756030

Melbourne PC User Group (2009). Graphics SIG Retrieved 3 August, 2009, from <http://groups.melbpc.org.au/~graphics/>

Monash University Library (2009). *EndNote advanced: Tips and tricks*. Churchill, Vic.: Monash University.

Rossi, A., & Cesar, A. (2008). A dog at the keyboard. *Animal Cognition*, 11(2), 329-338.

With just a few clicks, it is easy to use this "library" of references to create both the in-text citations in your document, and at the same time automatically create and maintain your list of references.

## Set the bibliographic style as needed

Although communication with the great apes has been attempted using a simple keyboard, less work has been done communicating with other mammals<sup>1</sup>.

Fortunately, recent research<sup>2</sup> into animal psychology<sup>3</sup> has made this easier<sup>4</sup>.

### References

1. Rossi A, Cesar A. A dog at the keyboard. *Animal Cognition*. 2008;11(2):329-38.
2. Melbourne PC User Group. Graphics SIG. 2009 [cited 2009 3 August]; Available from: <http://groups.melbpc.org.au/~graphics/>.
3. Brown M, Black B, Greene F, Scarlett W, White B. Savagery in the blue tit. *Feather and Wattle* [serial on the Internet]. 1999; 3(2).
4. Monash University Library. *EndNote advanced: Tips and troubleshooting*. Churchill, Vic.: Monash University; 2009.

You can use your School or Faculty style, or with a few clicks immediately change the citation and referencing style for submission to one or more journals.

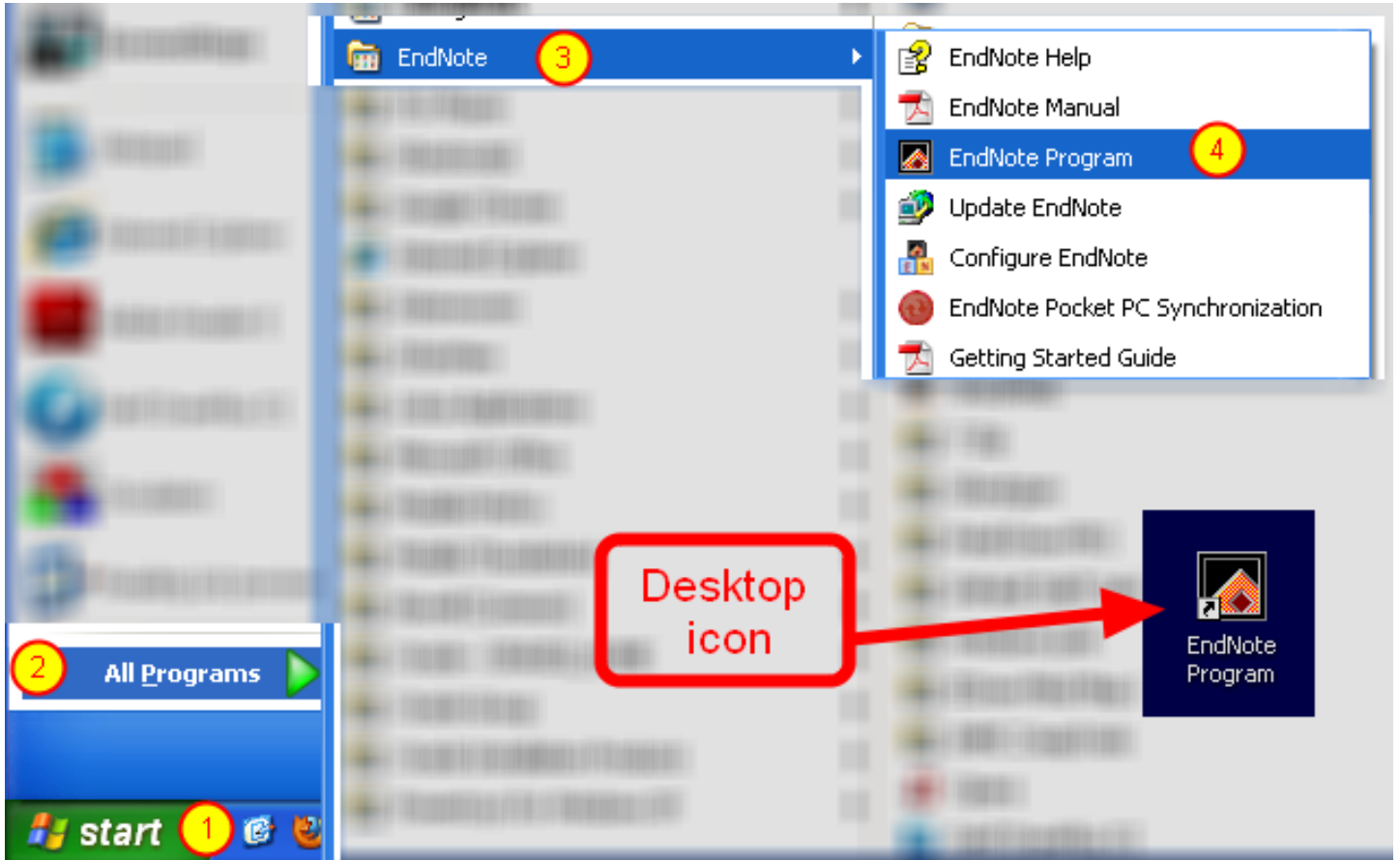
# **Working with references in EndNote**

# Creating a new "library"

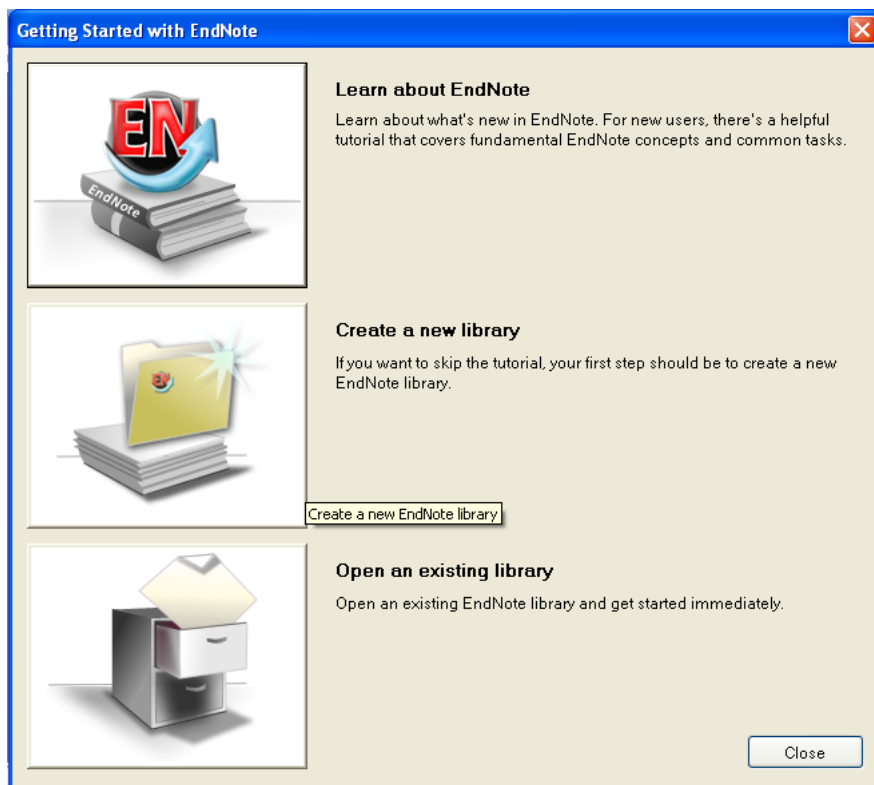
## EndNote and libraries

A **library** is the term EndNote uses for the database of references you will be creating.

## Start EndNote



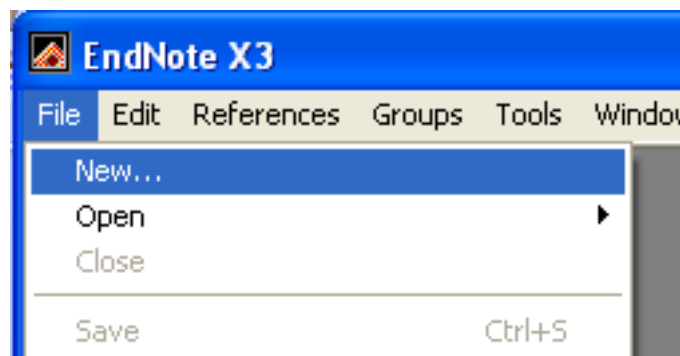
## The first time



The first time you start EndNote you may be asked about EndNote Web. Select "Do not create an EndNote Web account at this time".

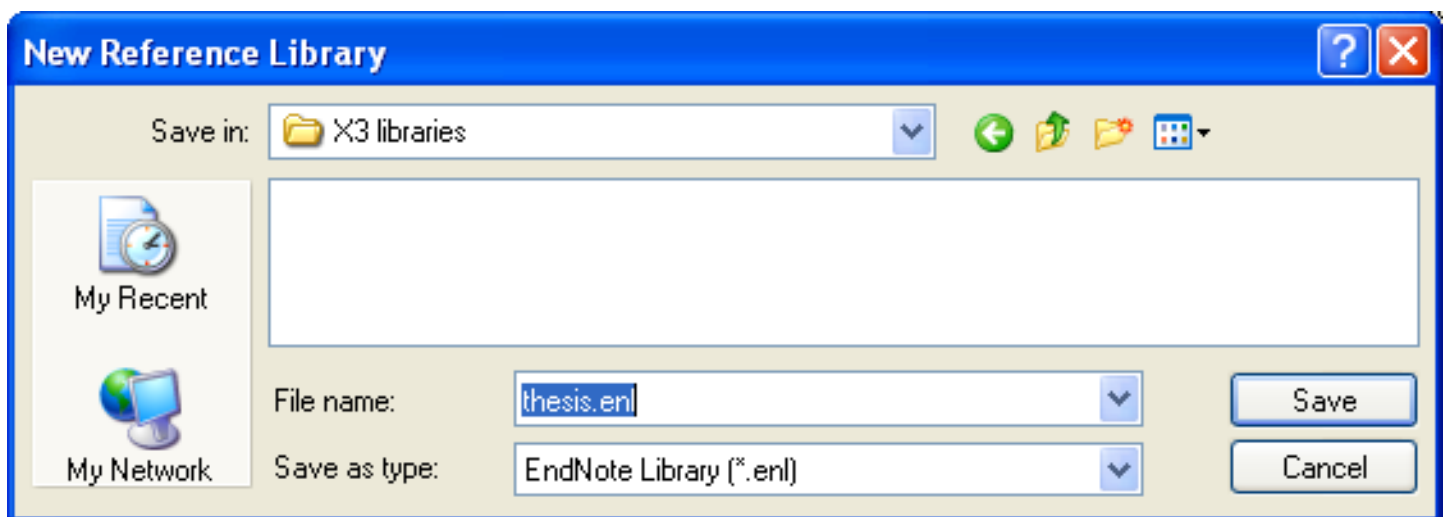
The first time you start EndNote, the **Getting Started** dialog box allows you to choose **Create a new library**.

## Creating a new library from the File menu



Alternatively, if you want to create a new EndNote library later, you can choose the **File** menu and select **New ...**

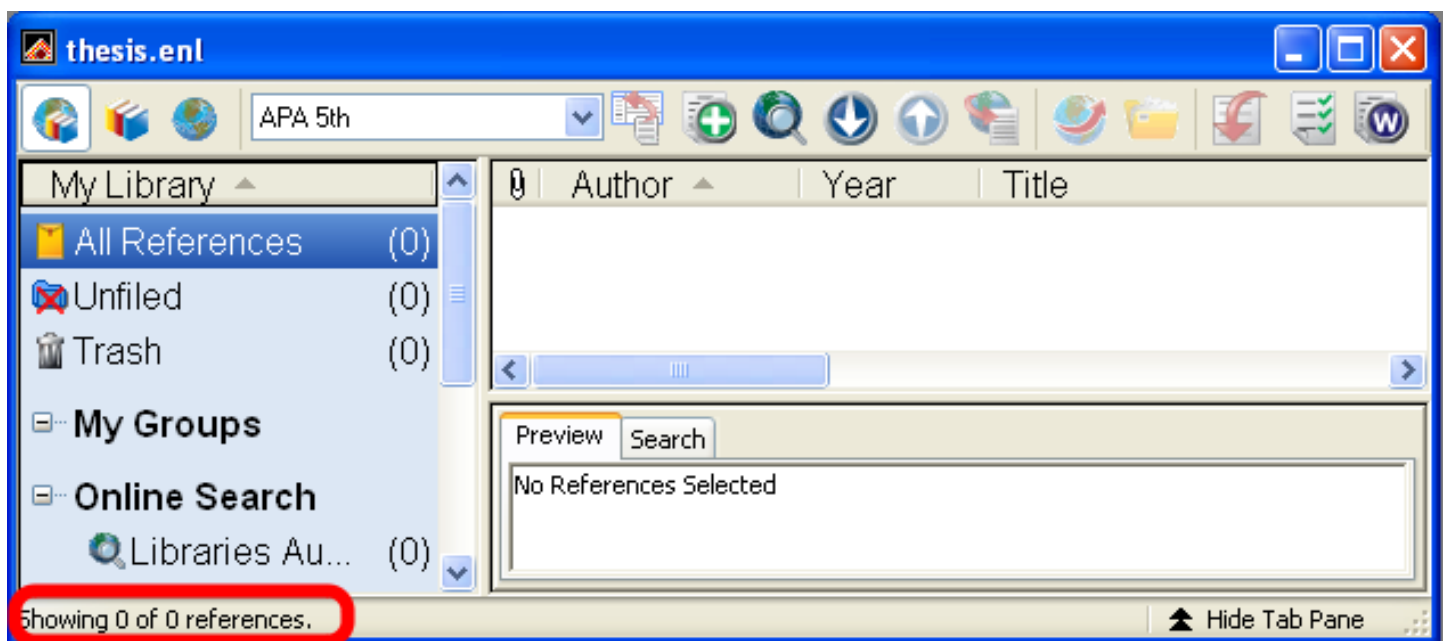
## Start a new library



1. In the **New Reference Library** dialog box, type a name for your library in the **File Name** field. For this tutorial, we will use the name *thesis.enl*  
Click on **Save**.

EndNote library filenames always take the form *filename.enl*

## New library created



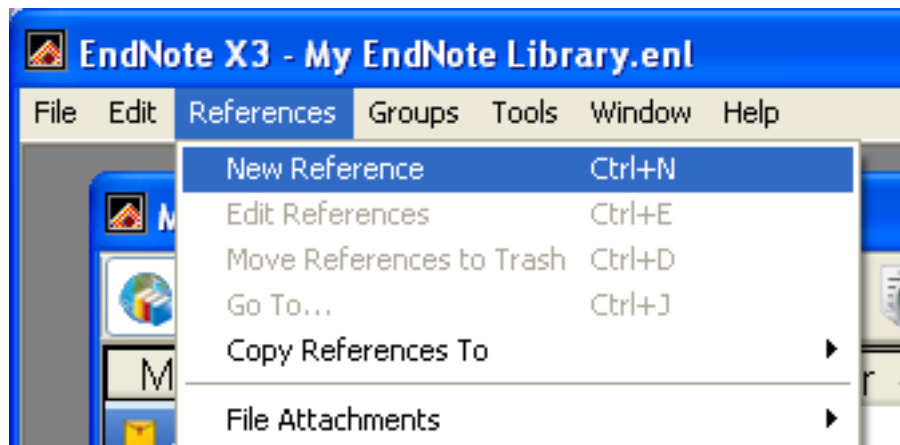
A **thesis.enl** window displays **Showing 0 out of 0 references** on the status bar.

You are now ready to enter your references into the library

## Adding a reference

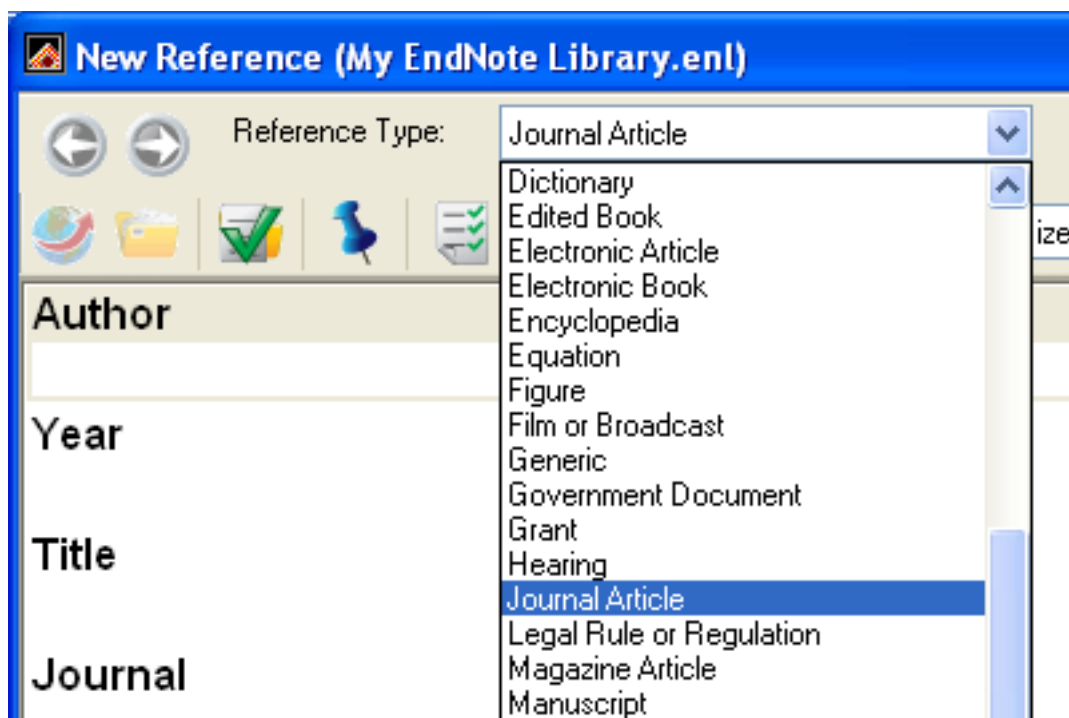
Add a new bibliographic reference to your EndNote library

### Create a new reference



To add a new reference, click on the **References** menu, and select **New Reference**.

### Select the reference type



Select the **reference type** before adding any details.

Different types of references (books, journal articles, web pages, etc) require different details. See the [Library's Citing and referencing](#) tutorial for more detail.

## Type in the details

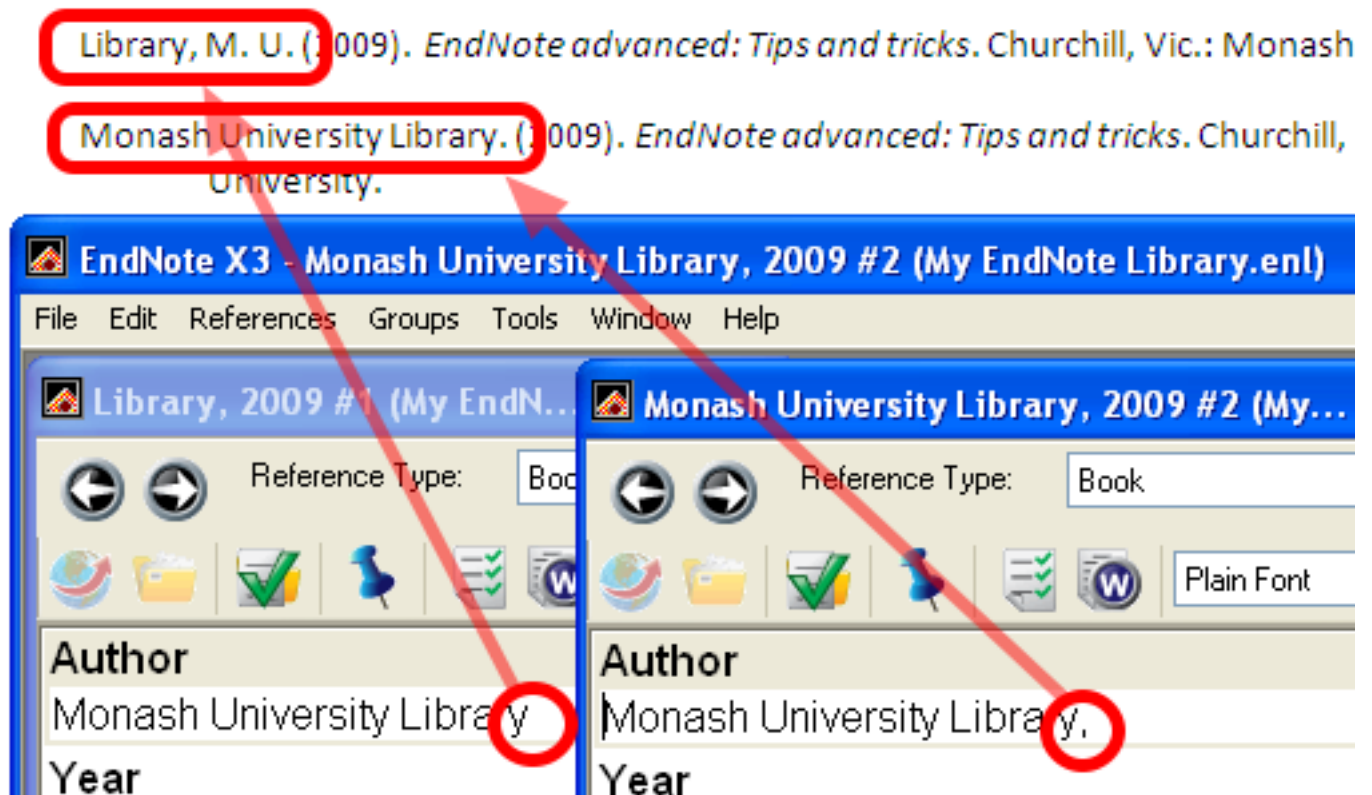


If this is the first time you have used an author or journal name, it will show up in red. If you have already entered the author or journal name, it will show up in black and attempt to provide auto-completion from the existing entry.

If the name is only similar, not identical, just keep typing to over-write the auto-completion.

Put each author (or editor) on a new line. The best way to enter (Western) authors (and editors) is surname (family name) first, then a comma ",", then first names or initials (enter whatever details you have available, EndNote will change full names to initials where appropriate for the bibliographic style).

## Corporate authors



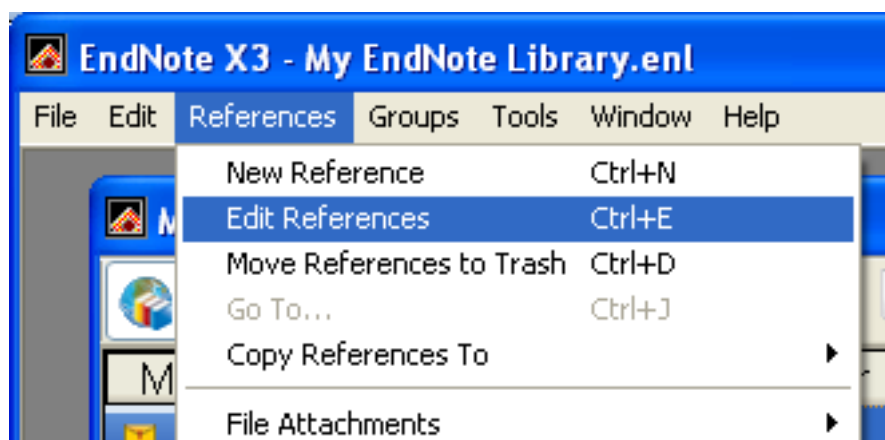
When entering a corporate author in EndNote, you must follow it with a comma. Otherwise, EndNote attempts to treat it as an individual author name.

## Changing a record

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Changing or editing a record

### Edit the reference



To change the details of a reference, highlight the reference in the list, choose the **References** menu and choose **Edit References**.

Alternatively, you can also just **double-click** on an individual reference in the list of references.

## Sorting EndNote records

---

Changing the display order within an EndNote library

**Click the column header**

Author	Year ▼	Title
Monash Univ...	2009	EndNote advanced: Tips and
Melbourne P...	2009	Graphics SIG
Rossi	2008	A dog at the keyboard
Foot	2006	The rise of the pumpkin
Brown	1999	Savagery in the blue tit
Fargo	1963	The archetypal cat

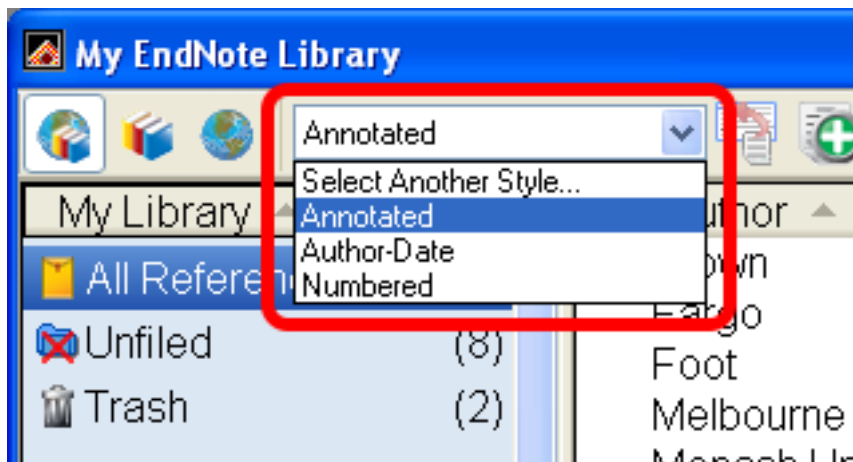
You can quickly change the order in which your EndNote records are displayed by clicking on the headers at the top of each column.

For example, clicking once at the top of the **Year** column sorts the references by publication date. Click again to reverse the order.

## Choosing and previewing a reference style

Choosing a bibliographic style within EndNote

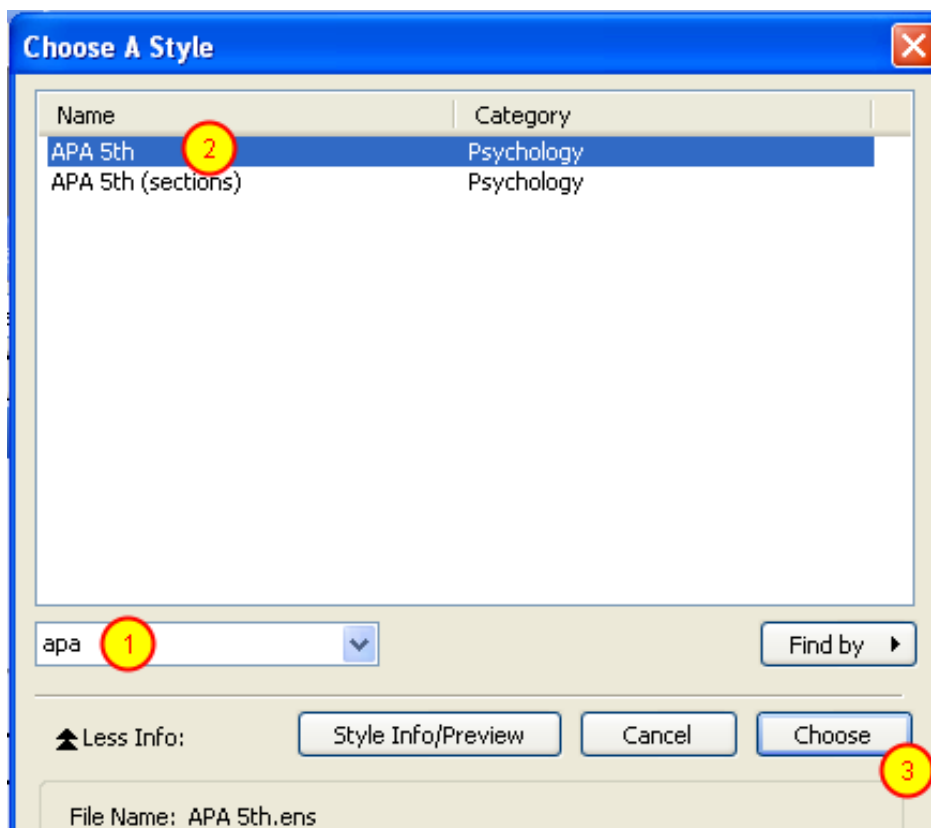
### Select Another Style...



In order to use styles in EndNote you need to select your "favourites" from the many styles EndNote provides.

From the drop-down style list at the top of the library, choose **Select Another Style ...**

### Choose your preferred style



If you know the style you want, you can easily find it by name (or even part of the name). For example, to find the APA style, type **APA** into the **Quick Search** box and hit **Enter**.

Highlight the **APA 5th** style and click the **Choose** button.

### Use your selected style in EndNote



When you select a style from the drop-down list on the toolbar, the preview will change to show the currently selected reference in that style.

The preview area shows how the reference will appear in your **reference list** (bibliography), **not** as an **in-text citation**.

# **Inserting EndNote references into Microsoft Word**

## Method 1: Adding an in-text citation (from Word)

Adding an in-text citation from within Word (will also update your reference list)

### Select (highlight) your reference in EndNote

Fargo	1963	The archetypal cat
Rossi	2008	A dog at the keyboard
Monash Univ...	2009	EndNote advanced: Ti
...	...	...

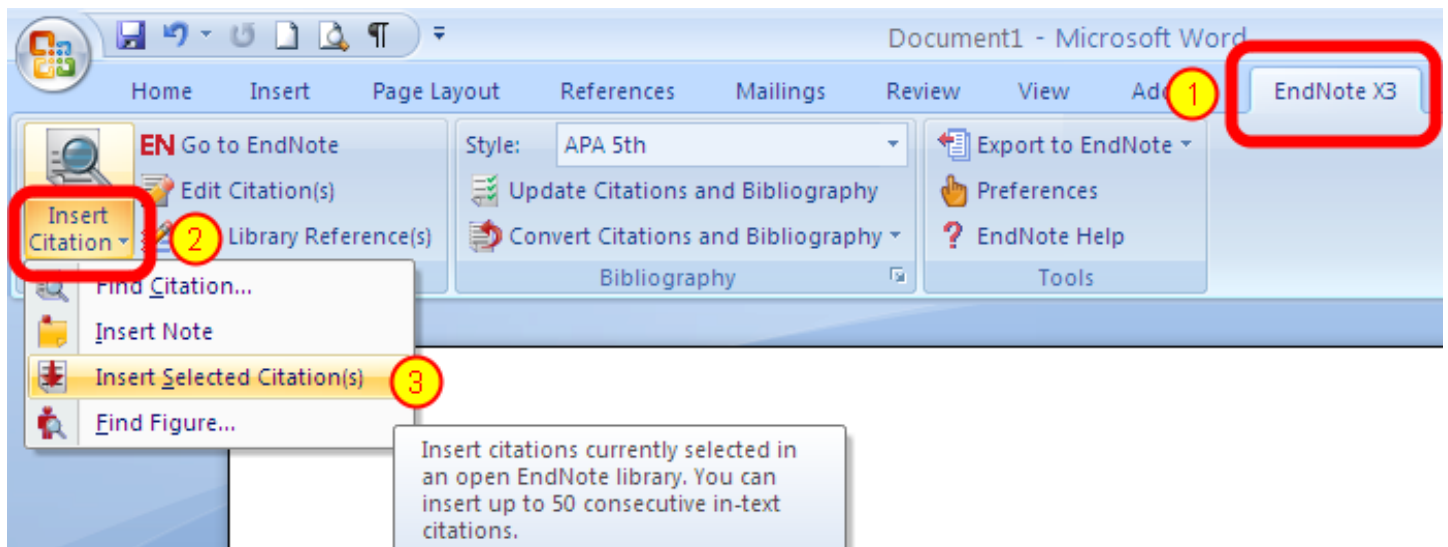
First highlight your desired reference in EndNote by clicking on it once..

### Change to Word



Change across to Word (you can use the keyboard shortcut Alt+Tab or click in the Windows taskbar to change programs)

### Insert the selected reference



Click once with your cursor in the Word document where you want the reference to be inserted.

In *Word 2007*, select the **EndNote** tab on the "ribbon", and in the Citations group, click on **Insert Citation** then **Insert Selected Citation(s)**.

In *Word 2003*, position the cursor where you wish to insert the citation, and select the **Tools** menu, **EndNote**, and **Insert Selected Citation**.

## Citations and bibliography entry inserted

Although communication with the great apes has been attempted using a simple keyboard, less work has been done communicating with other mammals (Rossi and Cesar 2008)

Rossi, A. and A. Cesar (2008). "A dog at the keyboard." Animal Cognition **11**(2): 329-338.

Changing back to Word, you should see both the in-text citation and the entry in your reference list have been added automatically.

## Method 2: Adding an in-text citation (from EndNote)

Inserting a citation from EndNote into Word.

### Place your cursor in the Word document

Although communication with the great apes has been attempted using a simple keyboard, less work has been done communicating with other mammals



Click once with your cursor in the Word document where you want the reference to be inserted.

### Change to EndNote



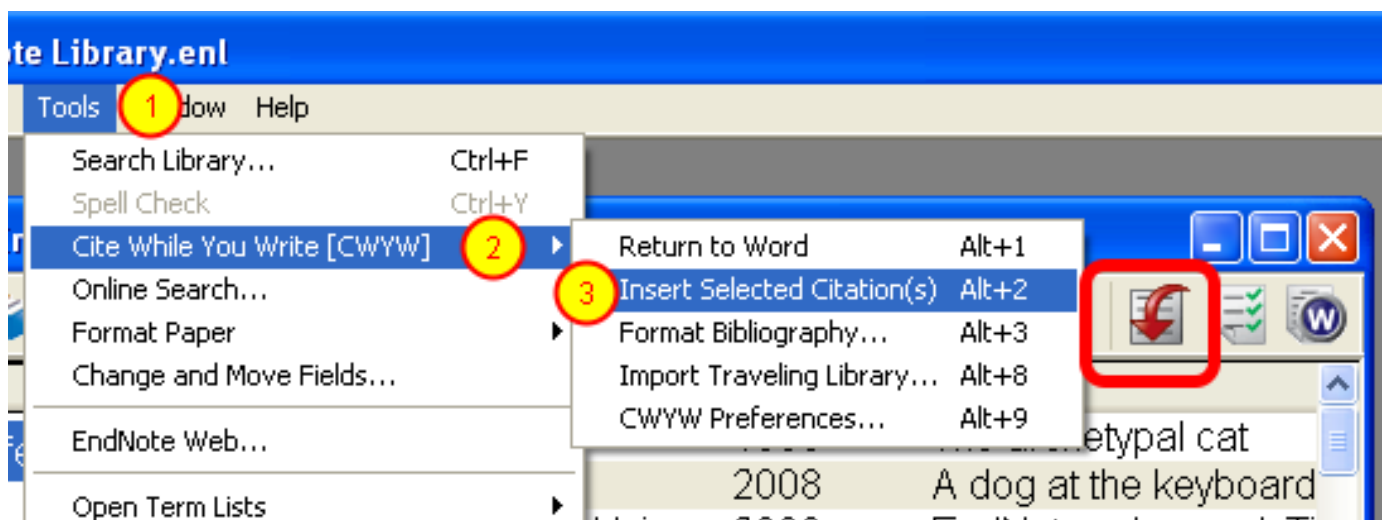
Change across to EndNote (you can use the keyboard shortcut Alt+Tab or click in the Windows taskbar to change programs)

### Select (highlight) your reference in EndNote

Fargo	1963	The archetypal cat
Rossi	2008	A dog at the keyboard
Monash Univ...	2009	EndNote advanced: Ti

First highlight your desired reference in EndNote by clicking on it once..

### Insert the citation



From the Tools menu in EndNote, select Cite While You Write [CWYW], then Insert Selected Citation(s)

Alternatively, use the Insert Citation button on the toolbar.

### Citations and bibliography entry inserted

Although communication with the great apes has been attempted using a simple keyboard, less work has been done communicating with other mammals (Rossi and Cesar 2008)

Rossi, A. and A. Cesar (2008). "A dog at the keyboard." Animal Cognition **11**(2): 329-338.

Changing back to Word, you should see both the in-text citation and the entry in your reference list have been added automatically.

## Method 3: Adding an in-text citation (from Word, using Search)

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Finding and entering an in-text citation from within Word

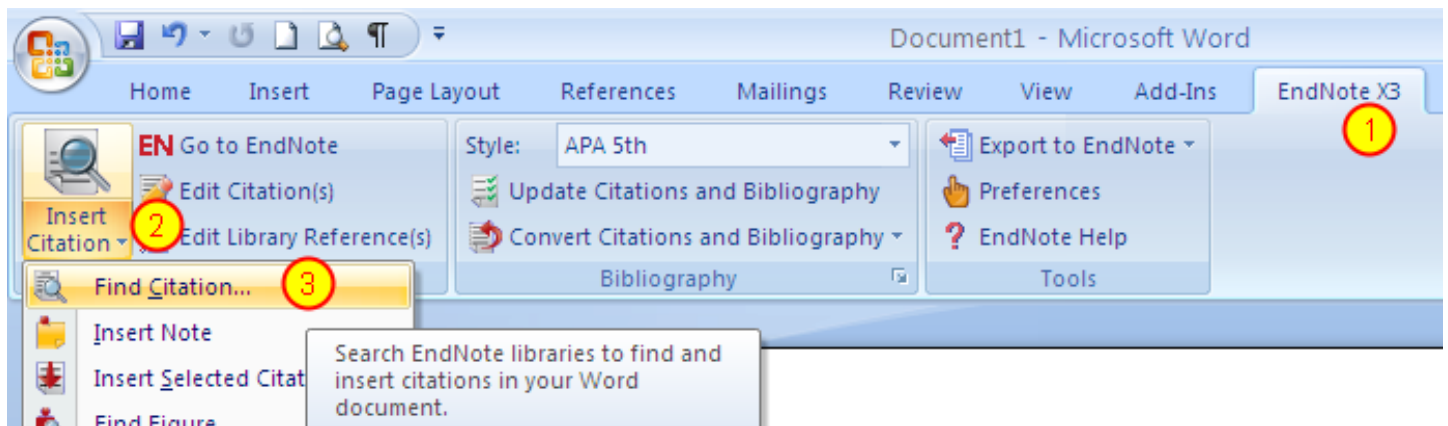
### Place your cursor in the Word document

Although communication with the great apes has been attempted using a simple keyboard, less work has been done communicating with other mammals



Click once with your cursor in the Word document where you want the reference to be inserted.

### Select Find Citation



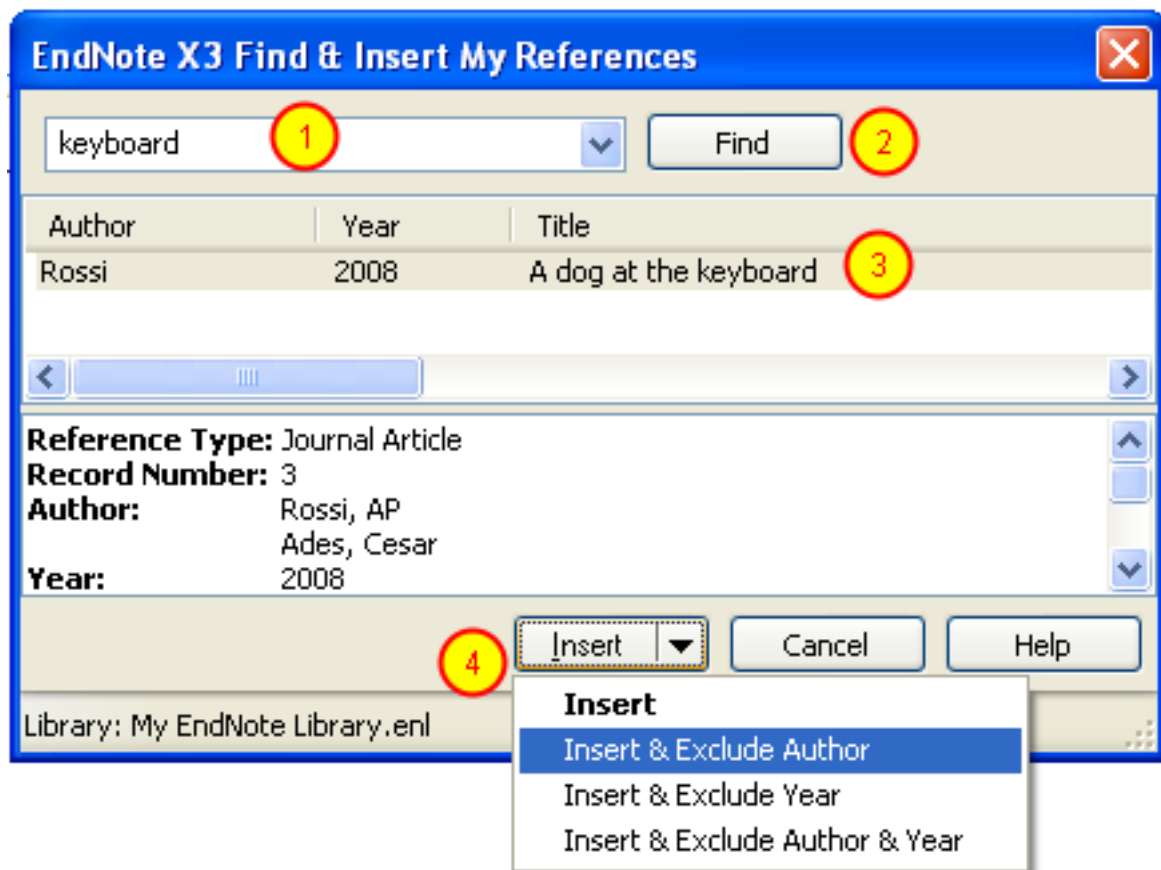
In *Word 2007*, select the **EndNote** tab on the "ribbon", in the Citations group select **Insert Citation**, then **Find Citation**.

(You can also click on the top half of the button to go directly into Find Citation.)

In *Word 2003*, select the **Tools** menu, **EndNote**, then **Find Citation**.

A search dialog box will open.

## Type in your search terms



Type in your search terms, and hit Enter or the **Find** button.

A list of matching records will appear. Highlight the one you want to use in Word, then click the **Insert** button. This will get you an in-text citation like **(Rossi & Ades, 2008)**, and the reference list at the end of your document will be updated automatically.

Alternatively, you can click on the down-arrow at the end of the button and get options such as **Insert & Exclude Author**. This will give you an in-text citation like (2008) and update your reference list, which is useful for cases where you write something like **Rossi and Ades (2008) state that ...**

## Citations and bibliography entry inserted

Although communication with the great apes has been attempted using a simple keyboard, less work has been done communicating with other mammals (Rossi and Cesar 2008)

Rossi, A. and A. Cesar (2008). "A dog at the keyboard." Animal Cognition **11**(2): 329-338.

You should see both the in-text citation and the entry in your reference list have been added automatically.

## Adding a footnote citation

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Adding a footnote citation

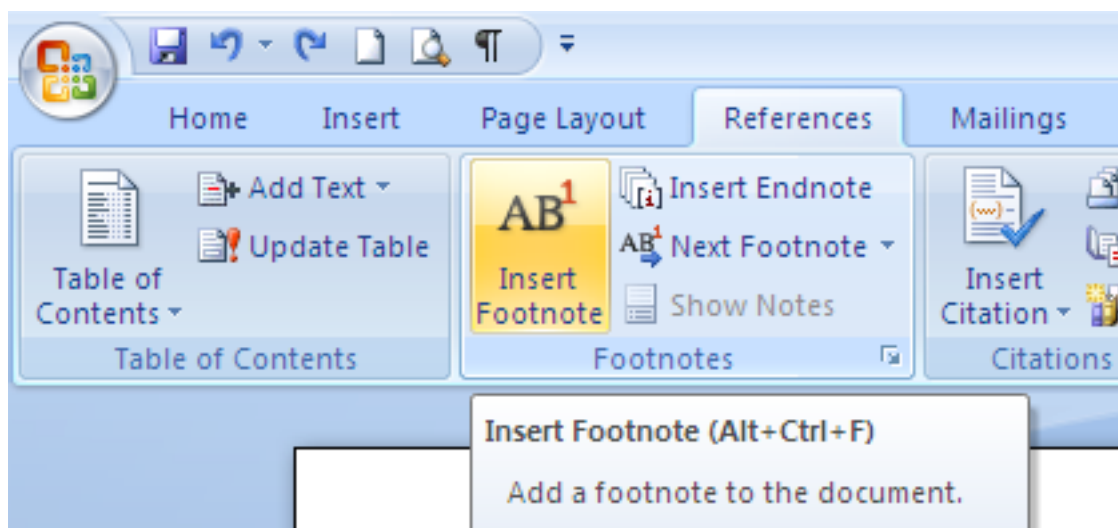
### Create a footnote in Word

Although communication with the great apes has been attempted using a simple keyboard, less work has been done communicating with other mammals|

Adding a footnote citation is exactly the same as adding a normal in-text citation, except you first use Word to create a footnote into which to place the citation.

In Word, place the cursor where you want to insert a footnote.

### Create the footnote



In *Word 2007*, select the **References** tab on the "ribbon", then click on **Insert Footnote**.

In *Word 2003*, select the **Insert** menu, **Reference**, then **Footnote**.

You will be taken to the footnote area automatically.

### Insert the citation as usual

---

1|

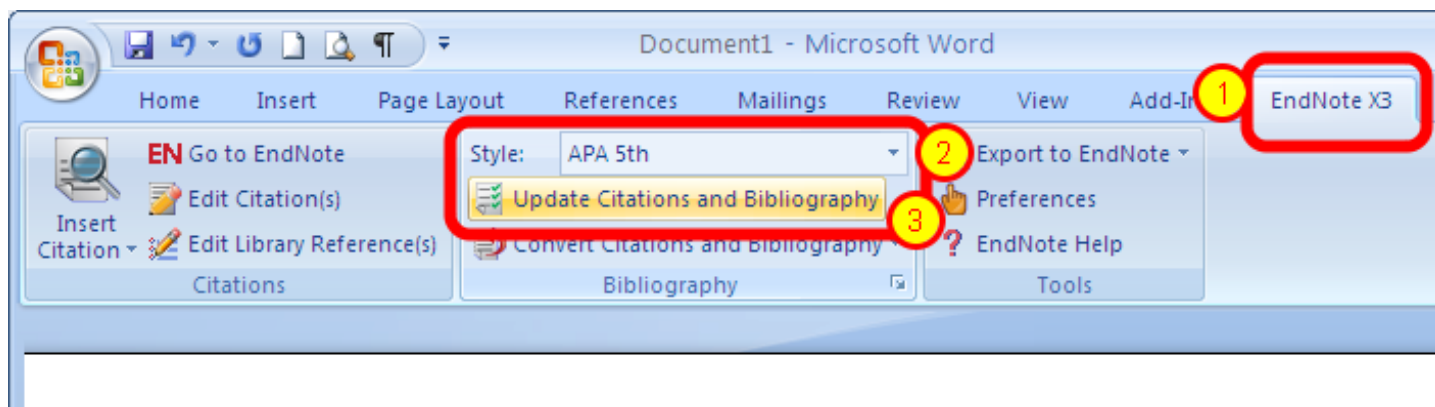
See the procedures for entering a normal in-text citation from EndNote into Word. The details added to the footnote will vary according to the style in use.

# Using EndNote references in Word

## Changing styles in Word

Change the bibliographic style and all associated formatting of in-text citations and the reference list

### Changing the selected style



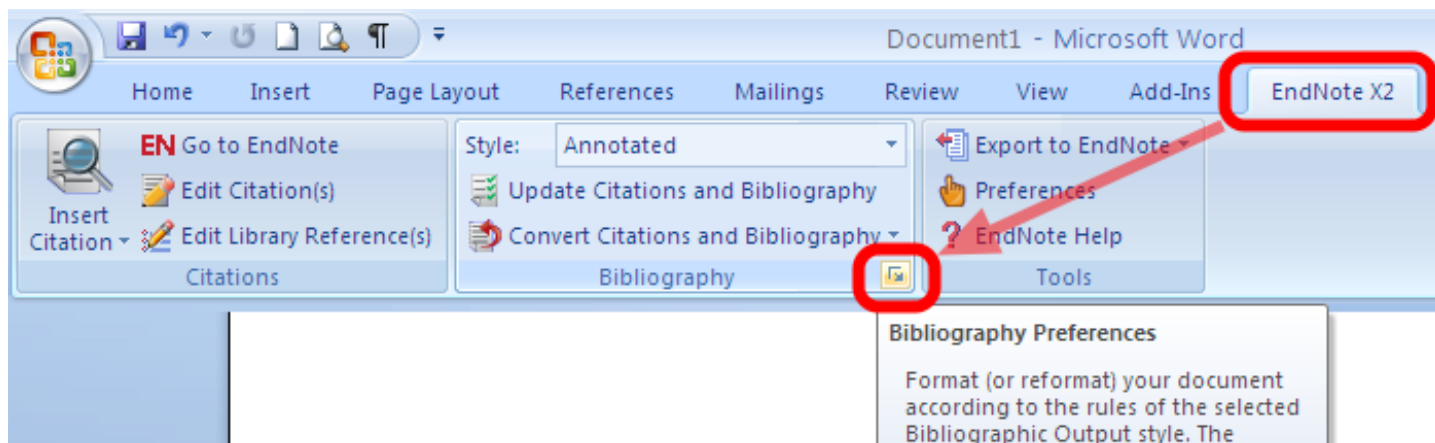
Word normally uses the bibliographic style currently selected in EndNote.

You can easily change this later in Word to any other style you have selected as a "favourite" in EndNote (styles you have not selected in EndNote will not be available in Word).

In *Word 2007*, select the **EndNote** tab from the "ribbon", choose a style from the drop-down list, then click on **Update Citations and Bibliography**.

In *Word 2003*, select the **Tools** menu, **EndNote**, then **Format Bibliography**, or click on the Format Bibliography button in the EndNote toolbar.

### Changing other bibliography options

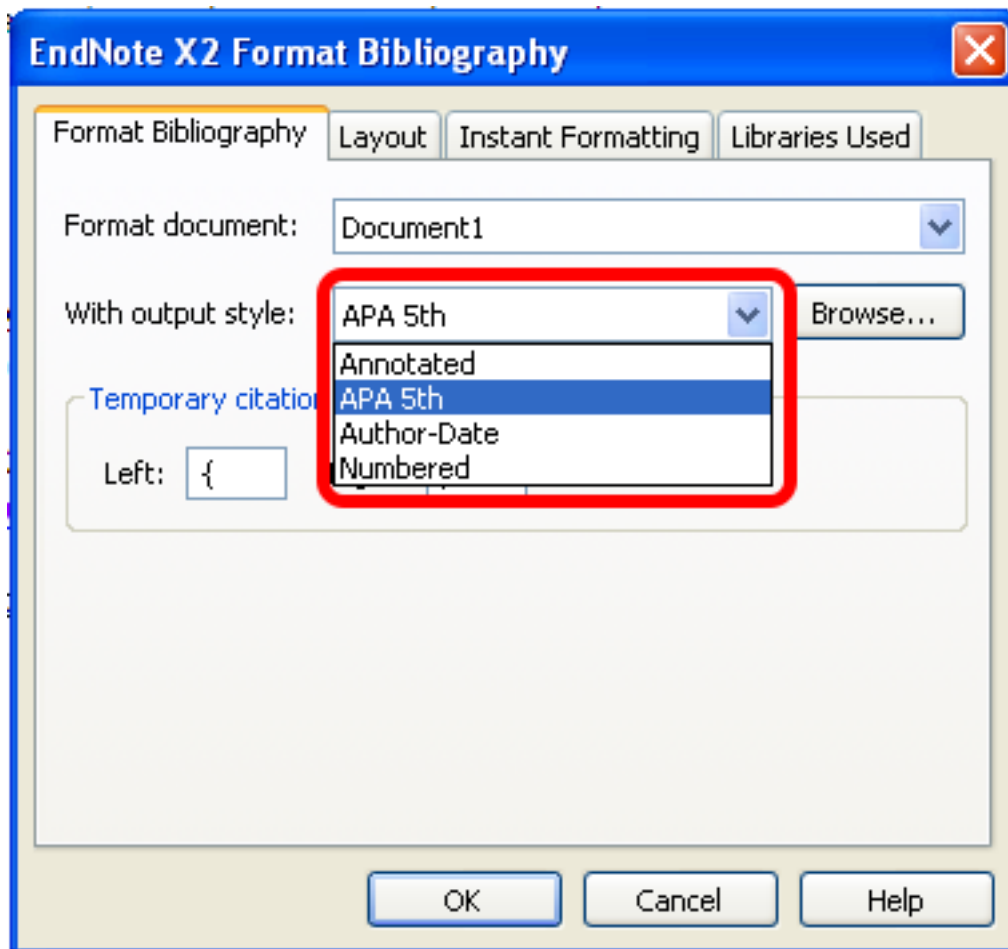


You can change other reference list/bibliography options, such as indenting, line spacing between references, etc.

In *Word 2007*, select the **EndNote** tab from the "ribbon", then click the button in the Bibliography group that opens the **Bibliography Preferences** dialog box.

In *Word 2003*, select the **Tools** menu, **EndNote**, then **Format Bibliography**, or click on the Format Bibliography button in the EndNote toolbar.

### Select a style



In the dialog box that appears, select the style you want from the drop-down list. This list only shows the styles you have selected as favourites in EndNote (see "Choose a style").

Click the **OK** button after selecting a style. This style will be applied throughout the document.

## Adding page numbers to an in-text citation

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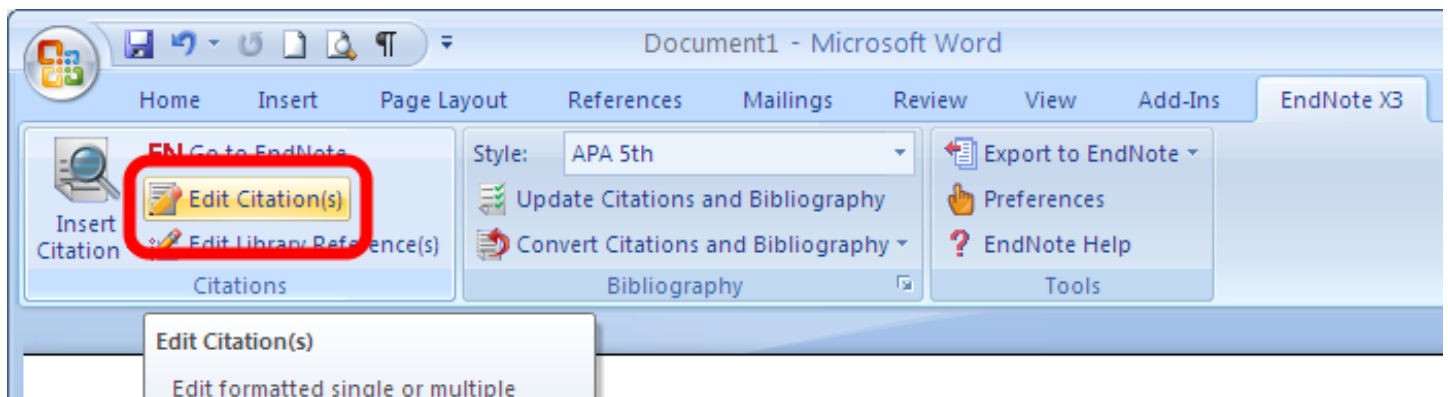
Adding page numbers into the citation, for direct quotes or for easier access to the original text

### Select the citation

Fortunately, recent research (Melbourne PC User Group 2009) into animal psych et al. 1999) has made this easier (Monash University Library 2009).

If you need to add page numbers to a citation, click anywhere in the citation (the background of the citation should turn grey to show it is selected).

### Edit the citation



In *Word 2007*, select the **EndNote** tab from the "ribbon", then click on **Edit Citation(s)**.

In *Word 2003*, from the **Tools** menu, **Endnote**, then select **Edit Citation(s)**, or use the button on the EndNote toolbar.

## Add page details

Use this window to view, select, edit and remove citations from your current document.

Citations in document:

- this with other mammals (...).
- Rossi, 2008 #3
- Fortunately, recent research (...) has made this much easier (...).
- Melbourne PC User Group, 2009 #10
- has made this much easier (...).
- Monash University Library, 2009 #2

Formatted Citation

Exclude author     Exclude year

Prefix:

Suffix:

Pages:

Insert...    Remove    ↑    ↓

Reference Type: Book  
Record Number: 2  
Author: Monash University Library,  
Year: 2009  
Title: EndNote advanced: Tins and tricks

OK    Cancel    Help

Library: Traveling Library    3 citations

For some major styles (e.g. APA 5th) you can simply add the page numbers in the **Pages** field and EndNote will do the rest..

However, for some styles where this is not set up properly, you will have to add everything into the **Suffix** field that you want to see added to the in-text citation.

## Details added

search (Melbourne PC User Group 2009) into animal psychology (E  
his easier (Monash University Library 2009, pp. 23-24).

After you click the OK button, you should see the page details added to the in-text citation.

## Deleting an in-text citation

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Remove an in-text citation without scrambling your Word document

### Select the citation

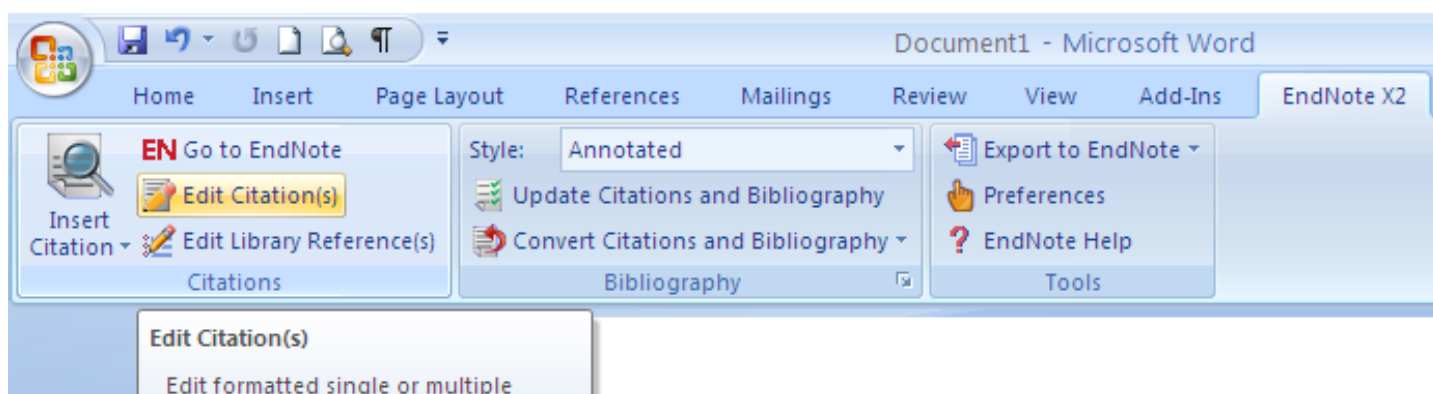
Fortunately, recent research (Melbourne PC User Group 2009) into anim et al. 1999) has made this easier (Monash University Library 2009).

Sometimes you want to remove an existing citation - it may be the wrong citation accidentally inserted, incorrectly placed, or some other reason.

Do not simply select and delete the citation in Word - EndNote inserts hidden formatting characters, and you may not delete all of them cleanly.

To remove a citation, first click once inside the in-text citation - the background of the citation should turn grey to indicate that it has been selected.

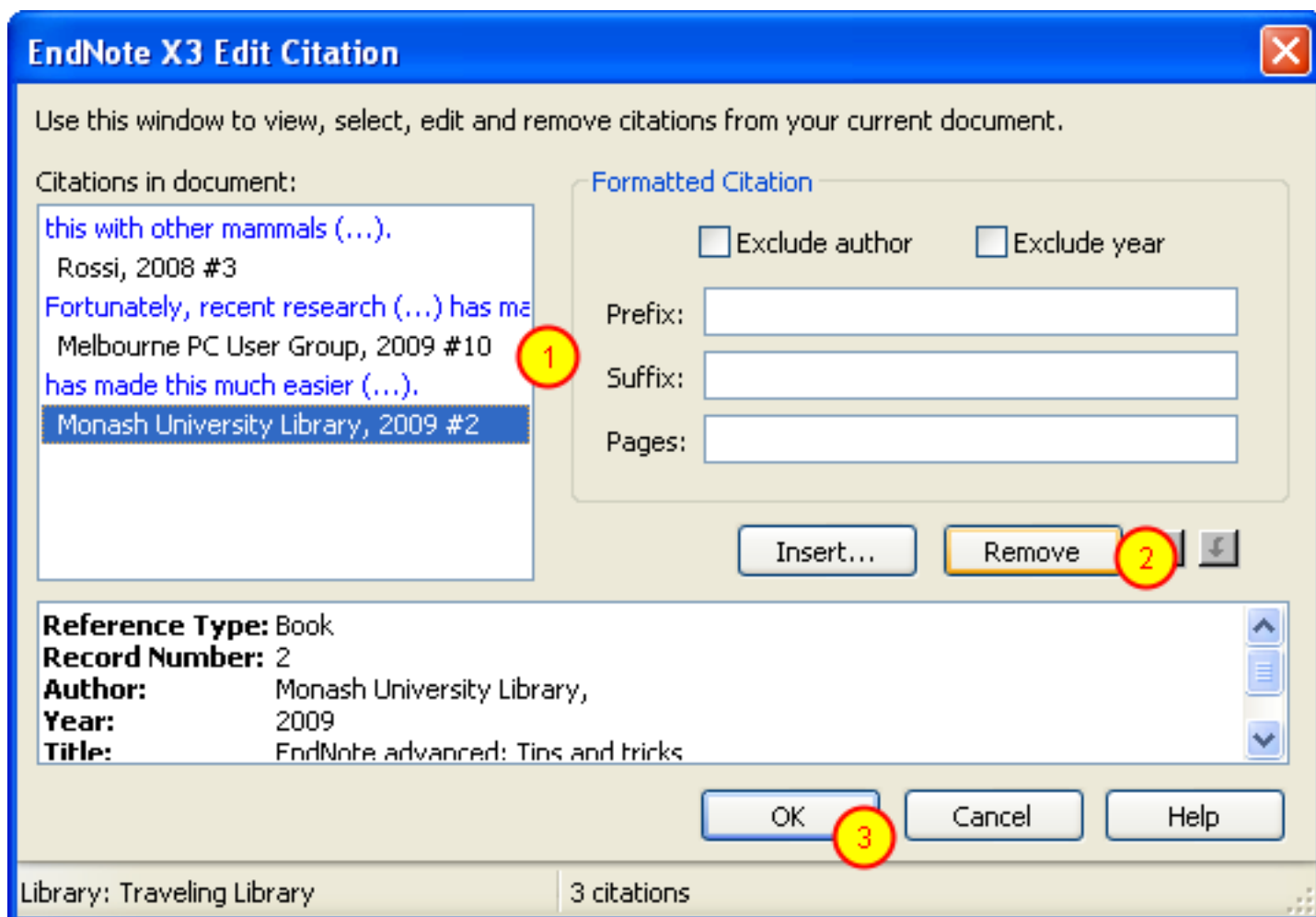
### Edit the citation



In *Word 2007*, select the **EndNote** tab in the "ribbon", then click on **Edit Citation(s)**.

In *Word 2003*, either choose the Edit Citation(s) button from the EndNote toolbar or from the Word **Tools** menu, select **EndNote** then **Edit Citation(s)**.

## Remove the citation



This will bring up the Edit Citations box you may remember from adding page numbers. Make sure the correct citation is chosen, then click on the **Remove** button, and then **OK**.

If this is the only time the citation was used, it will also be removed from the list of references.

## Changing an existing citation to date-only e.g. Smith (2009) states ...

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Adding only the year into an in-text citation

### Changing your mind

It has been stated (Rossi and Cesar, 2009) that ...

Rossi and Cesar (2009) state ...

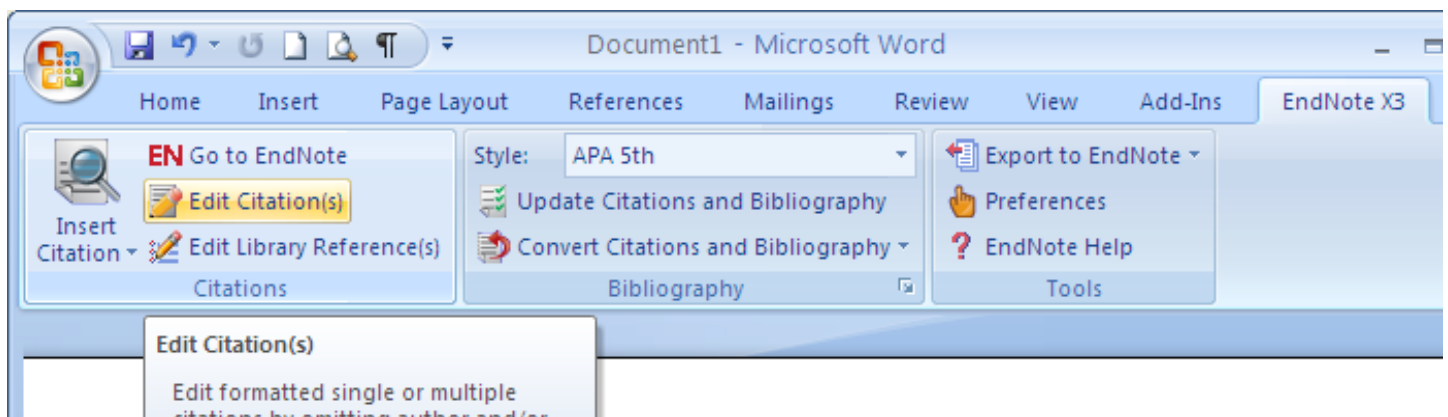
Sometimes you may have elected to insert author and date, but later change the style of the sentence to use the author(s) directly in the text, so you may want to remove the author from within the citation.

### Select the citation

Rossi and Cesar (Rossi and Cesar 2008) state ...

Insert your citation as usual, then click once on the citation in Word to select it. The background of the citation should turn a pale grey.

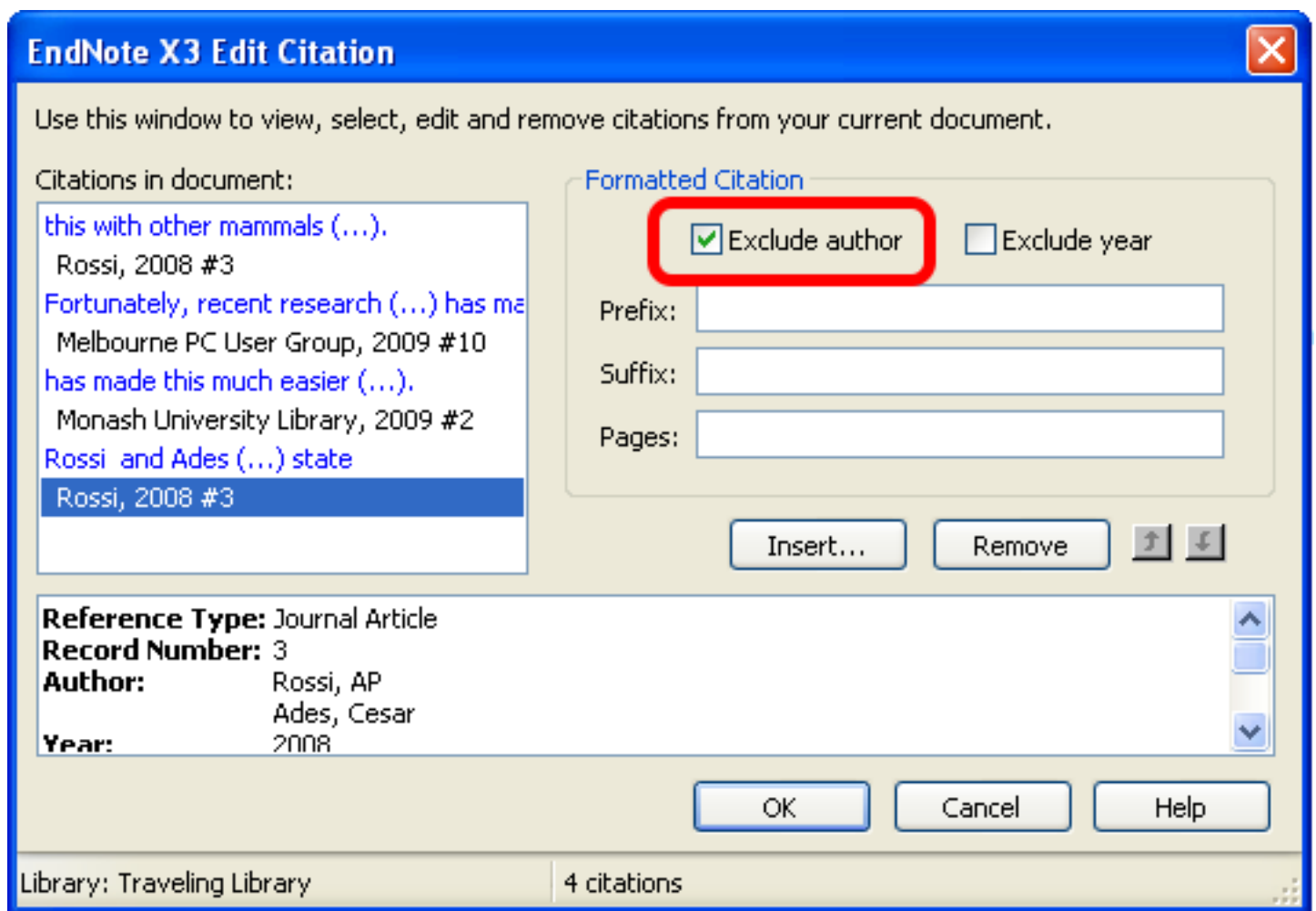
### Edit the citation



In *Word 2007*, select the **EndNote** tab from the "ribbon", then click on **Edit Citation(s)**.

In *Word 2003*, from the **Tools** menu, **Endnote**, then select **Edit Citation(s)**, or use the button on the EndNote toolbar.

## Exclude the author



In the Edit Citation dialog box, select the **Exclude author** option, then click the OK button.

## Check the citation

Rossi and Cesar (2008) state ...

The author should now be excluded from the in-text citation, but the entry in the reference list is unaffected.