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INTRODUCTION TO ENDNOTE X4

Contents

| | |
|---|----|
| PART 1 | |
| 1. Introduction | 1 |
| 2. Opening EndNote | 2 |
| 3. Setting up a New Reference Library | 3 |
| 4. Using the Toolbars | 5 |
| 5. Inputting References Manually | 5 |
| 6. Editing References in EndNote | 8 |
| 7. Grouping References | 8 |
| 8. Direct Export from a Database to EndNote | 10 |
| 9. Importing Downloaded References with a Filter | 11 |
| 10. Connecting Directly to Databases via the Internet (Online Search) | 15 |
| 11. Searching an EndNote Library | 19 |
| 12. Sorting an EndNote Library | 21 |
| PART 2 | |
| 13. Producing a Bibliography or Reading List | 22 |
| 14. Using EndNote with a Word Processor | 25 |
| a. Formatting References in an Author-Date Style | 26 |
| b. Formatting References in a Numbered Style | 30 |
| c. Formatting References in a Footnote/Endnote Style | 31 |
| 15. More on Formatting Documents | 32 |
| a. Including Notes in the List of References | 32 |
| b. Deleting a Citation | 33 |
| c. Adding Text before a Citation | 34 |
| d. Adding Text after a Citation | 36 |
| e. Omitting Authors' Names from Citations | 37 |
| f. Correcting Details in a Reference | 37 |
| g. Removing Field Codes | 38 |
| 16. Useful Web Addresses | 39 |

1. Introduction


EndNote is one of a number of Personal Reference Database programs that are available today. The main functions of such programs are:

- Maintenance of a personal database of references.
- Downloading references from other databases.
- Using the personal database to insert references in word-processed documents.
- Generating a bibliography in the correct style for publication.

The University of Queensland Library has negotiated a **site licence** for EndNote, which permits all members of the University to use the software both at work and at home. For information on how to **obtain and install** the software, see our website at:

<http://www.library.uq.edu.au/endnote/>

This guide aims to show you the basic skills required to get started using the latest version of EndNote. It does not cover everything you will ever need to know. The **help screens** in EndNote are very useful and they can be accessed by clicking on the **Help**

option on the menu bar at the top of the screen or the Help button  on the toolbar of your EndNote library.

There is also a useful **Getting Started** guide, which is a .pdf file installed on your computer in the same folder as your EndNote software. You can access it easily from the Windows Programs menu.

Assistance can also be obtained from the Library's *Referencing Helpdesk* at:

refhelp@helpdesk.library.uq.edu.au

For more complex problems, you can contact the staff at *EndNote* via the web at:

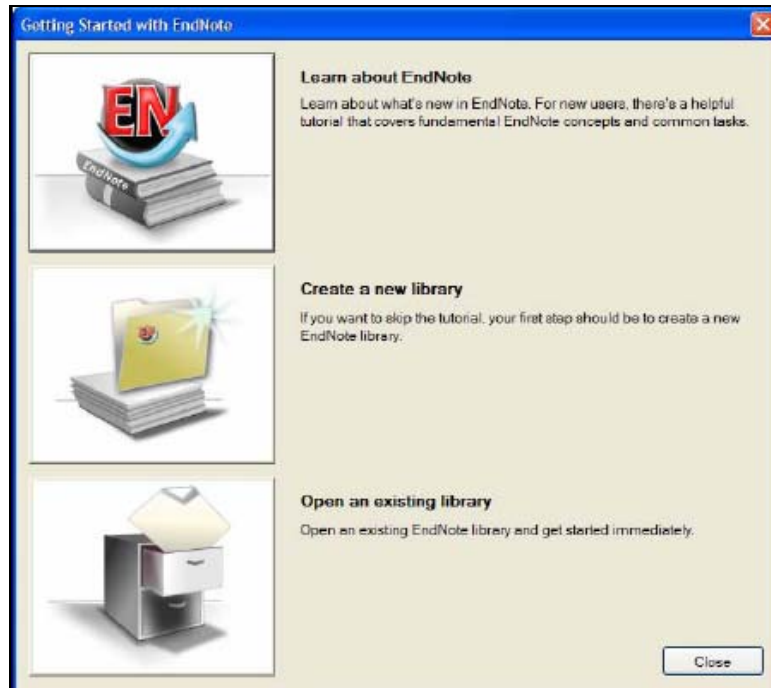
<http://www.endnote.com/support/entechform.asp>

In this guide we use the **Windows** operating system. EndNote X4 is compatible with Windows XP (with Service Pack 3), Vista and Windows 7. EndNote is also available for the **Macintosh**, and the two versions are very similar.

2. Opening EndNote

Locate the **EndNote Program icon** on your Start menu or desktop.

Click on the EndNote Program icon. If this is the first time you have used EndNote, you should see this dialogue box:



Initial Dialogue Box

What is an "EndNote Library"?

"Library" is the term used by EndNote to describe a file where you have stored a database of references. A library can contain up to 100,000 references.

Multiple libraries can be maintained, but generally there is no need to do this. All references can be kept in the one library, and labelled or grouped to reflect any particular subject interest. We strongly recommend that you maintain **one library only**.

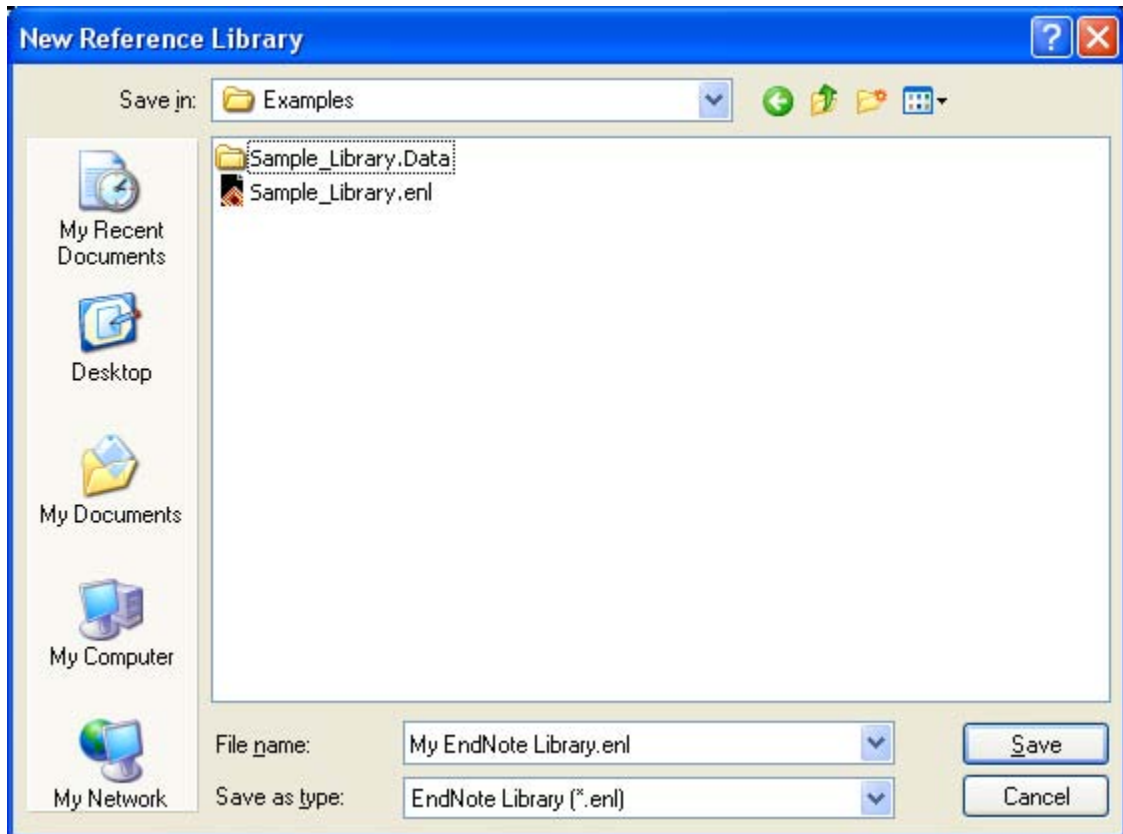
You can set up a default library, which will open automatically when you open EndNote. To do this, select: Edit>Preferences>Libraries

Once you have set up a default library, you will no longer see the introductory dialogue box.

3. Setting Up a New Reference Library

Click the **Create a new library** graphic.

You will see a dialogue box like this, with **My EndNote Library.enl** as the name of the new library:

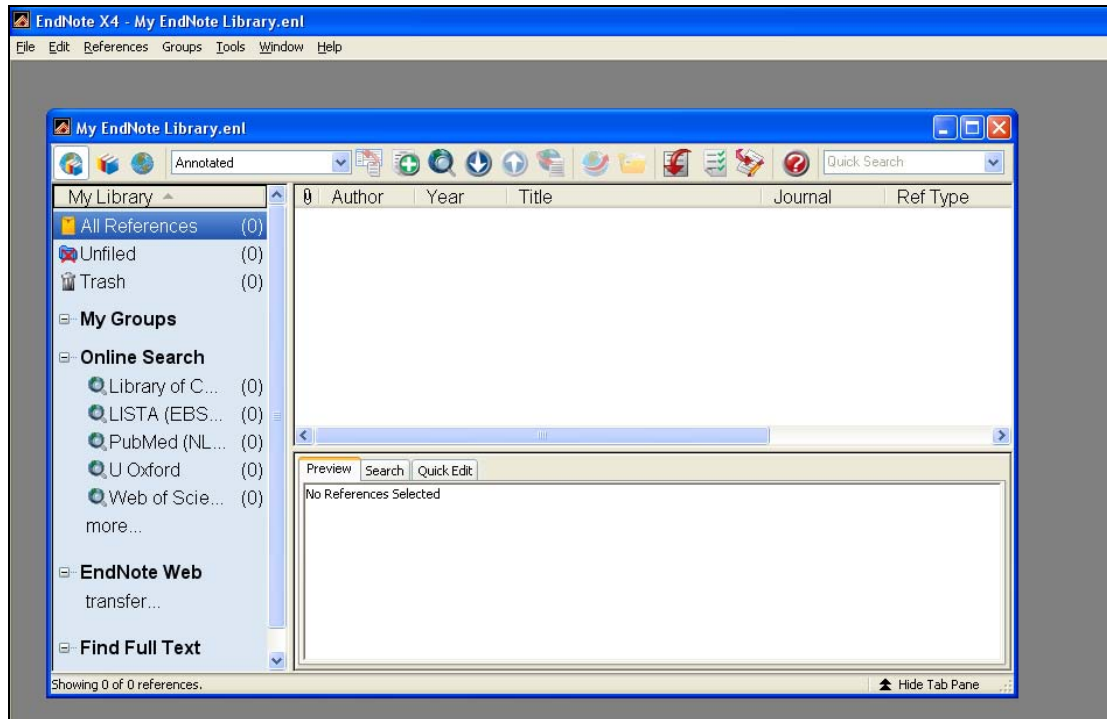


New Library Dialogue Box

In the **Save in** box, select the folder where you wish to save the library.

In the **File name** box, type a name for your library.

Click on **Save**. You should see a new library window, like this:



New Library Window

The **Tab Pane** at the bottom of the library window will show you what your formatted references look like. It is also used for **searching** your library or a remote database. To close the Tab Pane, click on **Hide Tab Pane**.

The **Groups Pane** at the left of the library window allows you to organise your references into groups. You can close the Groups Pane by clicking on the **Groups** option on the top menu bar and selecting **Hide Groups**.

More about EndNote libraries

The file extension **.enl** stands for EndNote Library. A library is just a file on your computer, like any other file. It can be copied, renamed, deleted, moved to another folder or compressed.

It is very important to make back-up copies of your library regularly and store them on another drive. An easy way to back-up your library is to go to the **File** option on the menu bar, and select **Compressed Library**.

When EndNote creates the library, it will also create a **.DATA folder** which contains various files connected with the library. When you compress the library, EndNote will include the .DATA folder.

A compressed library can be uncompressed by using the **File>Open** command.

The library window can be resized or maximised, like any other window.

4. Using the Toolbars

Note the **toolbar** at the top of the library window. If you position your mouse over any of the buttons on the toolbar, a text box will appear showing the name of the button.

When we start inputting references, you will see that the window for each reference also has a toolbar.

Do I have to use the toolbars?

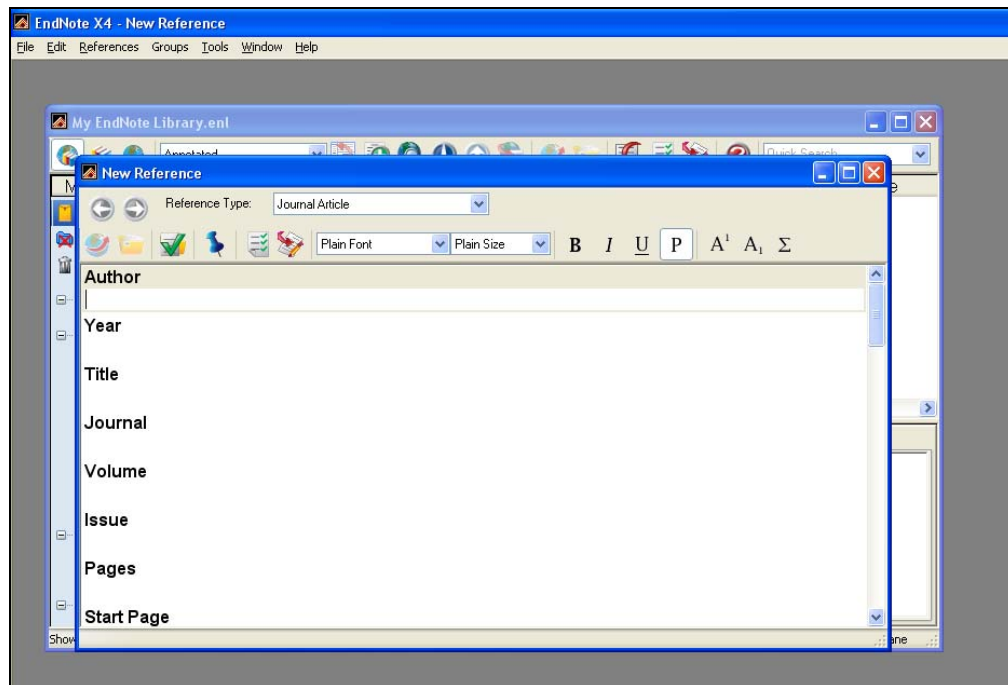
All the commands on the toolbars can be accessed from the menu bar at the top of the screen, if you prefer to work that way. The toolbars give you faster access to the most common commands.

In this guide, we will use the toolbars.

5. Inputting References Manually

Find a **journal article** which is relevant to your research and use this to practise inputting references manually.

Click on the **New Reference** button  on the library toolbar. You should now see a new reference window:

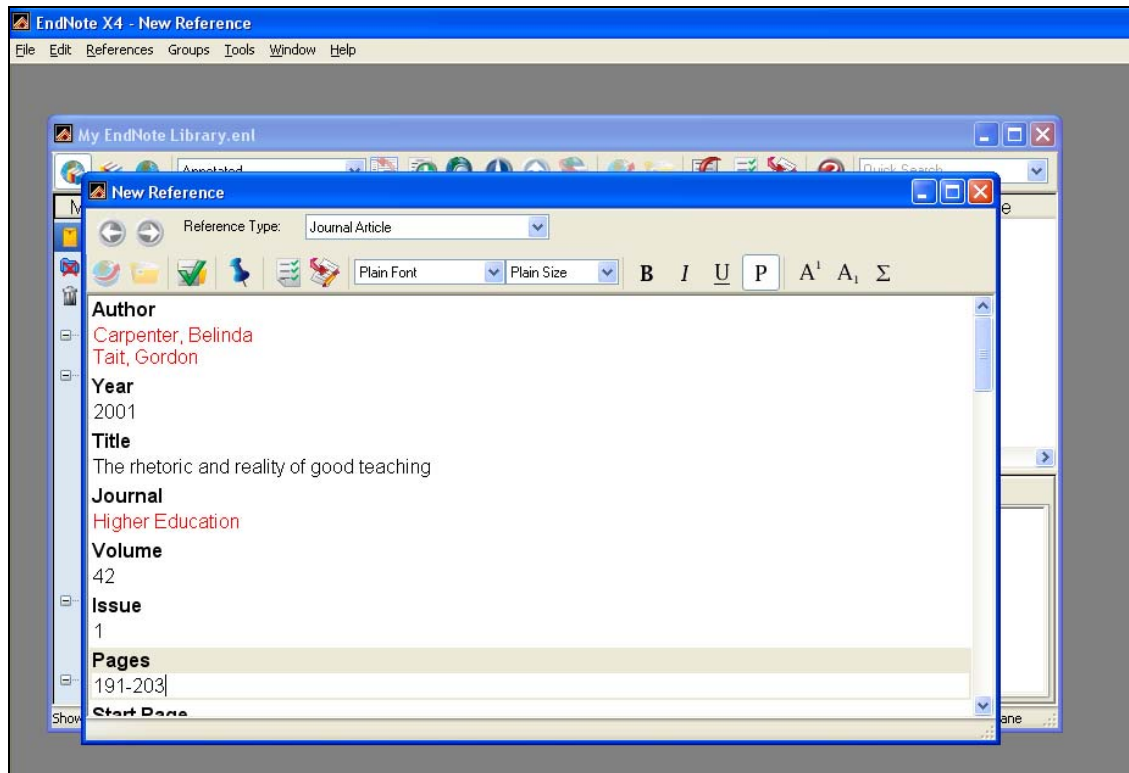


New Reference Window

Note that **Journal Article** is the default **Reference Type**. Click on the arrow at the right of the Reference Type box to see the other reference types (e.g. Book, Conference Proceedings, Map, Web Page, etc.)

With **Journal Article** as the option in the Reference Type box, input the details for the article. Use the **Tab** key to go from one field to the next, or click in the next field with the mouse.

When you have finished typing the data for your reference, it should look something like this:



Reference for a Journal Article

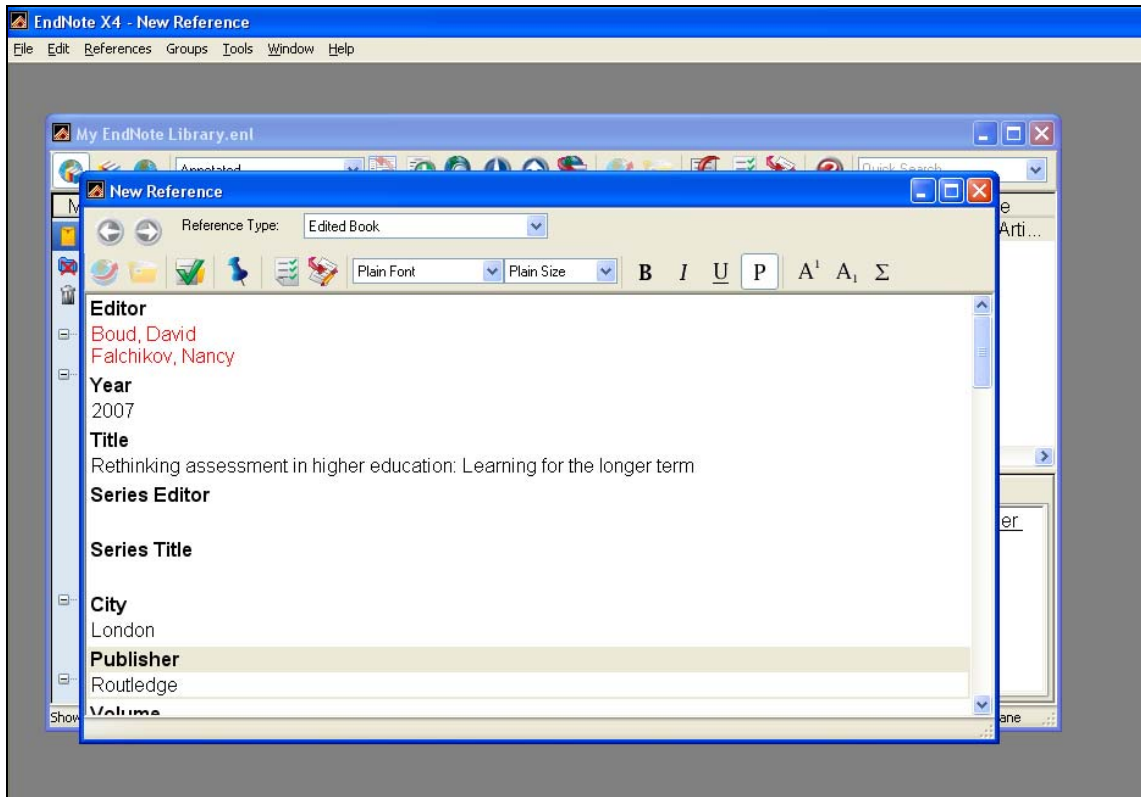
Close the reference by clicking on the **X** button in the top right-hand corner of the New Reference window. **Closing also saves the reference.**

Practise inputting a reference for a **book**.

Remember to select the appropriate **Reference Type**, and then input the data.

After inputting the data, **Close** the reference.

A reference for an edited book should look something like this:



Reference for an Edited Book

"Garbage In, Garbage Out"

Later you will learn about the EndNote output styles. These convert the data in your library into formatted references. The output styles can only format your data correctly if you have entered the data correctly in your library.

Here are some important points to remember when entering data:

- If there is more than one author, *each author must be entered on a separate line.*
- Corporate authors must be entered with a comma at the end, e.g. Queensland Health,
- Just add the basic data, in the default EndNote font. The output style will change this to bold or italics (if necessary) and add extra text such as "vol." or "Ed." (if required by the style).
- Fields such as Abstract, Notes, Research Notes are for your use. These fields can each store up to sixteen pages of text.
- Use the URL field to link to an electronic version of the document on the web.
- Use the File Attachments field to link to a PDF version of the document stored on your own computer.
- If you use abbreviated journal titles in your publications, you can set up a term list to store the abbreviations. There is more information in the Help screens and on the UQ Library EndNote website.

6. Editing References in EndNote

In the library window, double-click on one of the references that you have entered. This will **open** it for editing.

You can **change** any of the details. For example, add some text to the Notes field. Close the reference when you have finished editing and this will **save** the changes.

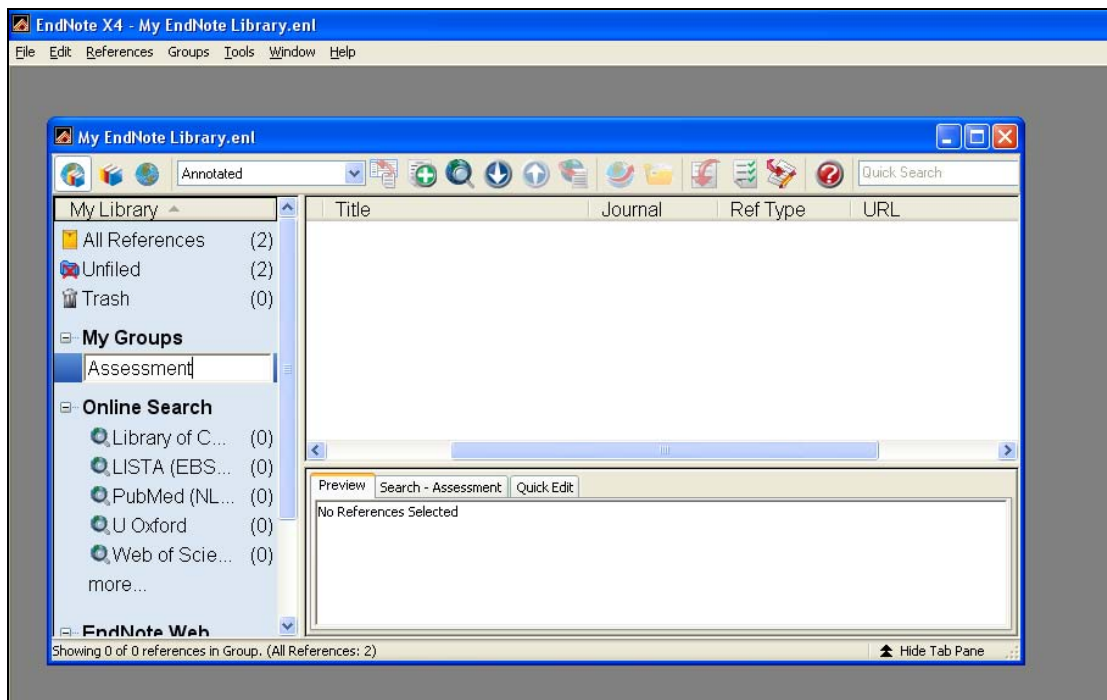
Alternatively, to make a small change quickly, you can click on the reference once to highlight it, and then click on the **Quick Edit** tab in the tab pane at the bottom of the Library window.

If you want to delete a reference from your library, click on it once in the library window to select it, and then go to the **References** option on the menu bar, and select **Move References to Trash**.

7. Grouping References

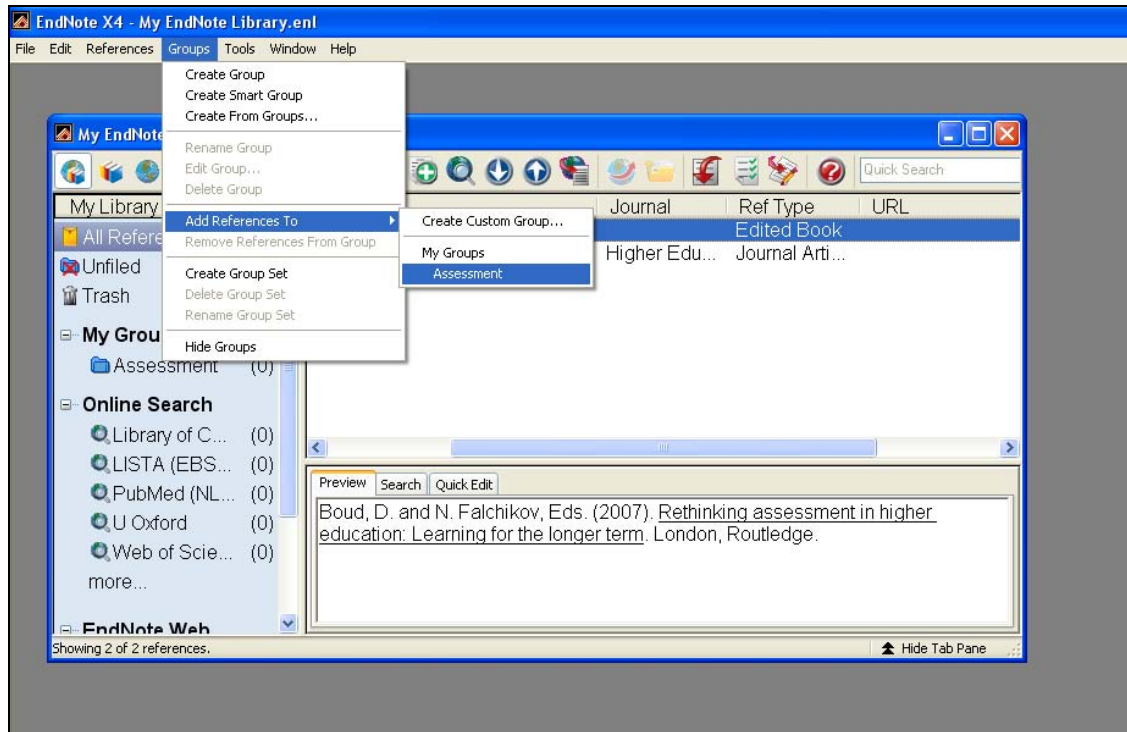
Once you have entered a significant number of references into your library, you may find it helpful to **group them by subject**. This is a much better option than setting up separate libraries for each topic.

To set up a group, click on **Groups** on the top menu bar, and select **Create Group** from the drop-down menu. This will open a box in the **Groups Pane** on the left-hand side of the library window, where you can type a name for the group.



Creating a New Group

To add a reference to a group, make sure that you have selected **All References** in the Groups Pane. Highlight the reference in the library window. Click on **Groups** on the top menu bar, click on **Add References To** from the drop-down menu, and then select the name of the group.



Adding a Reference to a Group

More on groups

You can also add references to groups by right-clicking on the reference and selecting the group, or you can drag-and-drop the reference onto the group name in the Groups Pane.

You can have up to 500 groups in your library.

You can set up smart groups. These groups have an inbuilt search query. When a new reference is added to your library, it is checked against the search query. If it matches, it is automatically added to the smart group.

For more sophisticated grouping, you can organise your groups into group sets.

8. Direct Export from a Database to EndNote

What is "direct export"?

When you are searching certain databases via the web, you will find that they allow you to select records and then send them directly to your EndNote library. This is called "direct export".

Direct export will only work if you are using **Internet Explorer** or **Firefox** as your web browser.

With some databases, such as Web of Science, this feature works very well. However with certain databases you will find that the records do not import accurately and need to be edited after import.

Use your web browser to display the UQ Library Database list at:

<http://www.library.uq.edu.au/database/>

Locate the listing for **Web of Science** and click on it. Note that, despite the name of this database, it contains references in all subject areas. Do a keyword search.

When the first page of results is displayed, click in the boxes beside some of the references to "mark" those references. Now click on the button labelled **Save to**

EndNote, RefMan, ProCite



This will activate the direct export process. Depending on your browser, you may see a dialog box asking you what to do with the references. If so, you should choose to **open** the file. EndNote uses a helper application called **ResearchSoft Direct Export Helper** to import the references into your EndNote library.

In the library window you will see only the references which you have just imported. They have been placed in a temporary **Imported References** group. To see all references in your library, click on the **All References** group in the Groups Pane of the library window.

You can return to Web of Science and go to the next screen of results and import further references to EndNote. Always export the references before moving to the next screen of results.

9. Importing Downloaded References with a Filter

What is a "filter"?

A filter is a piece of software that will take a file of references which have been downloaded from a database and convert them into references in your EndNote library.

The file of references must be in plain text (*.txt) and must be split up into labelled fields, something like this:

```
AU: Smith, J.  
TI: New developments in instructional software  
SO: Journal of Educational Technology, vol. 3 (2001): 305-318
```

A filter is specific to a particular database (e.g. Medline, Psycinfo). When the database is marketed by more than one vendor, different filters will be required for each vendor's version of the database (e.g. Medline from Ovid, Medline from Ebsco, Medline from CSA).

Use your web browser to display the UQ Library *Downloading References to EndNote* page at:

http://www.library.uq.edu.au/faqs/endnote/downloading_references.html

As you will see, some databases offer direct export to EndNote, but for some you need to use a filter. The filter may be supplied with your EndNote software, or you may have to download it.

If you need to download a filter, save it in your EndNote filters folder. The default location of the filters folder is:

C:\Users\[UserName]\Documents\EndNote\Filters (on *Windows 7* and *Windows Vista*).

C:\Documents and Settings\[UserName]\My Documents\EndNote\Filters (on *Windows XP*)

Use your web browser to display the UQ Library Database list at:


<http://www.library.uq.edu.au/database/>

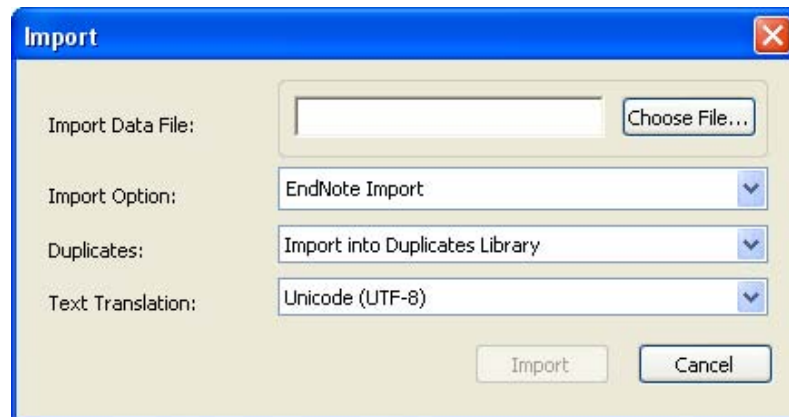
Open your chosen database. Perform a **search** and select some useful references.

Using the instructions from the Downloading References to EndNote page, **download** the references in the correct format for import to EndNote. An EndNote filter can only import a **plain text** file (*.txt).

Save the downloaded references in any convenient folder.

Return to EndNote, and make sure that your library is open.

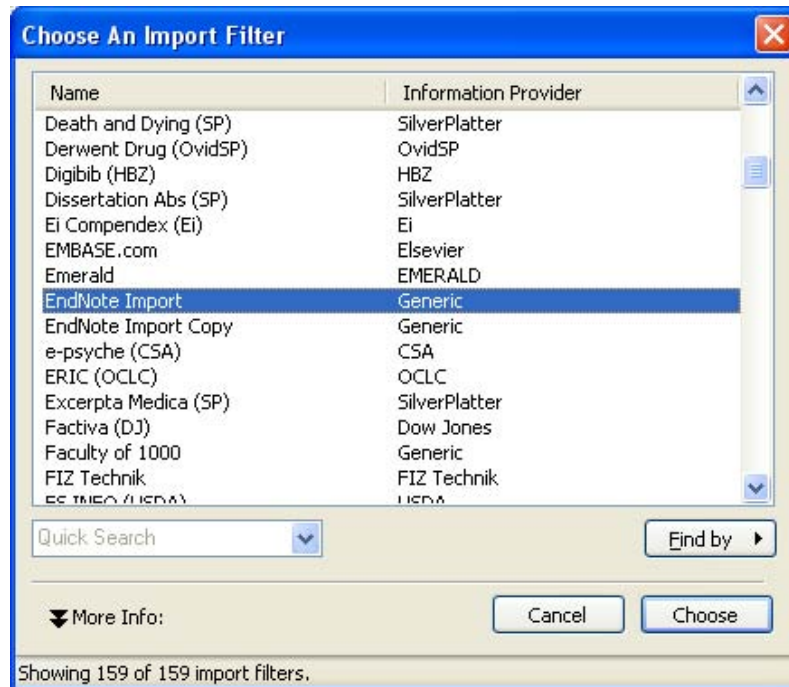
Click on the Import Button  on the library toolbar. You should see a dialogue box that looks like this:



Import Dialogue Box

Now click on the **Choose File** button. Locate and select the file of references that you downloaded.

In the box labelled **Import Option**, click on the down arrow to see some of the standard import options. Then click on **Other Filters** to open the list of filters:



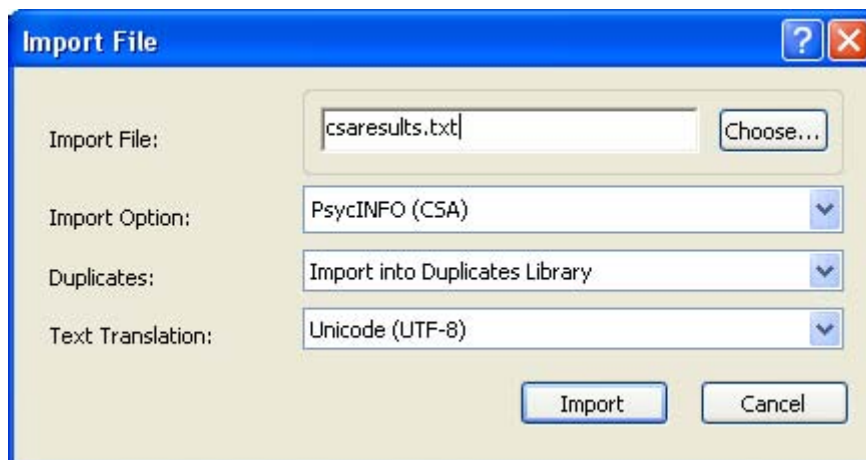
Filters List

Browse down the list of databases until you find the filter which you downloaded.

Highlight the filter and click on the **Choose** button. This will return you to the previous dialogue box.

Next, in the **Duplicates** box, select *Import into Duplicates Library*.

In the **Text Translation** box, the default option *Unicode (UTF-8)* is appropriate in most cases. The dialogue box should now look something like this:



Import Dialogue Box

Click on the **Import** button and the references should be imported. In the library window you will see only the references which you have just imported. They have been placed in a temporary **Imported References** group. To see all references in your library, click on the **All References** group in the Groups Pane of the library window.

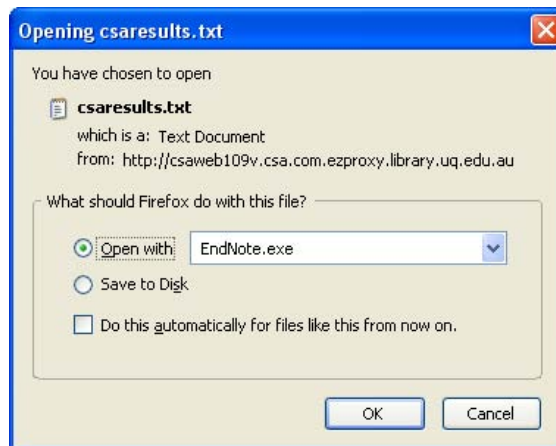
More on filtering references

No filter is perfect, and all references should be checked after import. For this reason, it is often better to import references into a temporary library, and leave them there until they can be checked against the file of downloaded references and amended. They can then be copied to the permanent library.

Shortcut when using Firefox:

If you use Firefox as your web browser, you can shortcut the filtering process explained above.

When you are saving references from the database, Firefox will display a dialogue box. In this dialogue box, select the **Open with** option, and use the drop-down menu to find your EndNote software:



Firefox Dialogue Box

Click on the **OK** button.

EndNote will now begin the import process. It will open a dialogue box showing a list of filters. **Choose** the correct filter.

EndNote will complete the import process.

10. Connecting Directly to Databases via the Internet (Online Search)

What is a "connection file"?

A connection file is a piece of software that allows you to search a database over the Internet, without leaving EndNote. You can then select references from the database and import them directly into your EndNote library.

Connection files only work with databases which support a particular search protocol called Z39.50, so not all databases can be searched using a connection file.

Use your web browser to display the UQ Library *EndNote Online Search* page at:
http://www.library.uq.edu.au/faqs/endnote/online_search.html

Read the information at the top of that page about the **security restrictions** which limit the use of EndNote connection files.

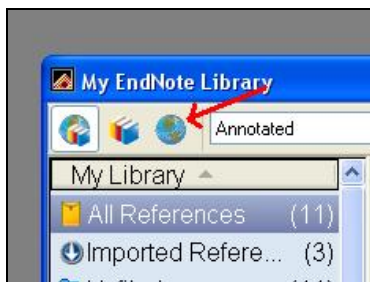
Note that some connection files require a **username** and **password** to access the database.

If you see a connection file which looks useful for your research, **download** it and save it in your EndNote Connections folder. The default location of the connections folder is:

C:\Users\[UserName]\Documents\EndNote\Connections (on *Windows 7* and *Windows Vista*).

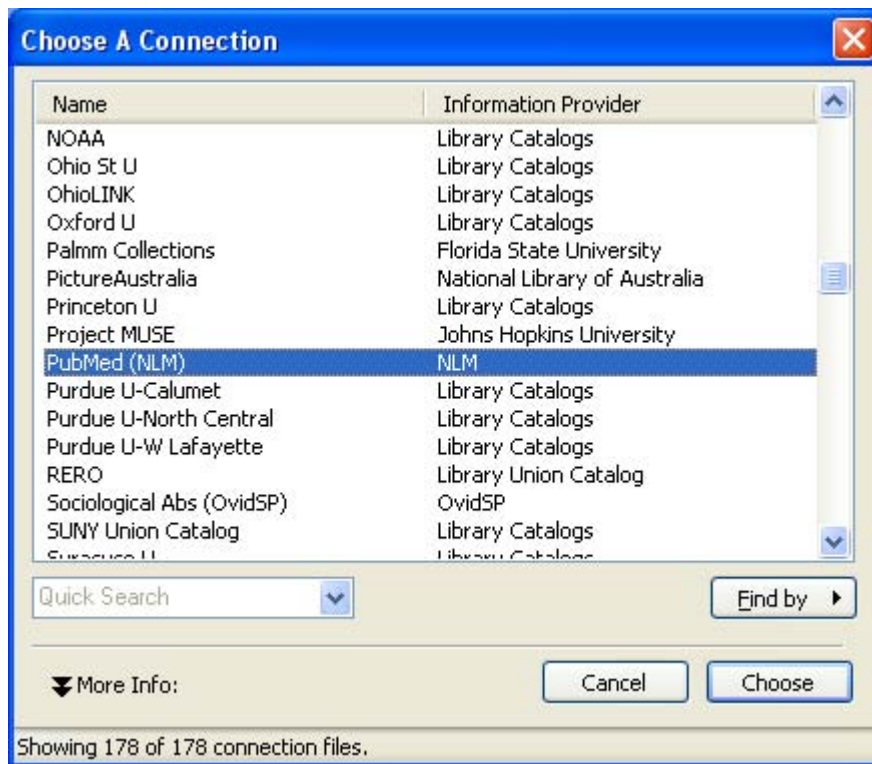
C:\Documents and Settings\[UserName]\My Documents\EndNote\Connections (on *Windows XP*)

In the top left-hand corner of your EndNote library window, click on the **Online Search Mode** button. This is the third of the three mode buttons:



Mode Buttons

Now click on the **Online Search** button  on the library toolbar. A list of available connection files will appear:



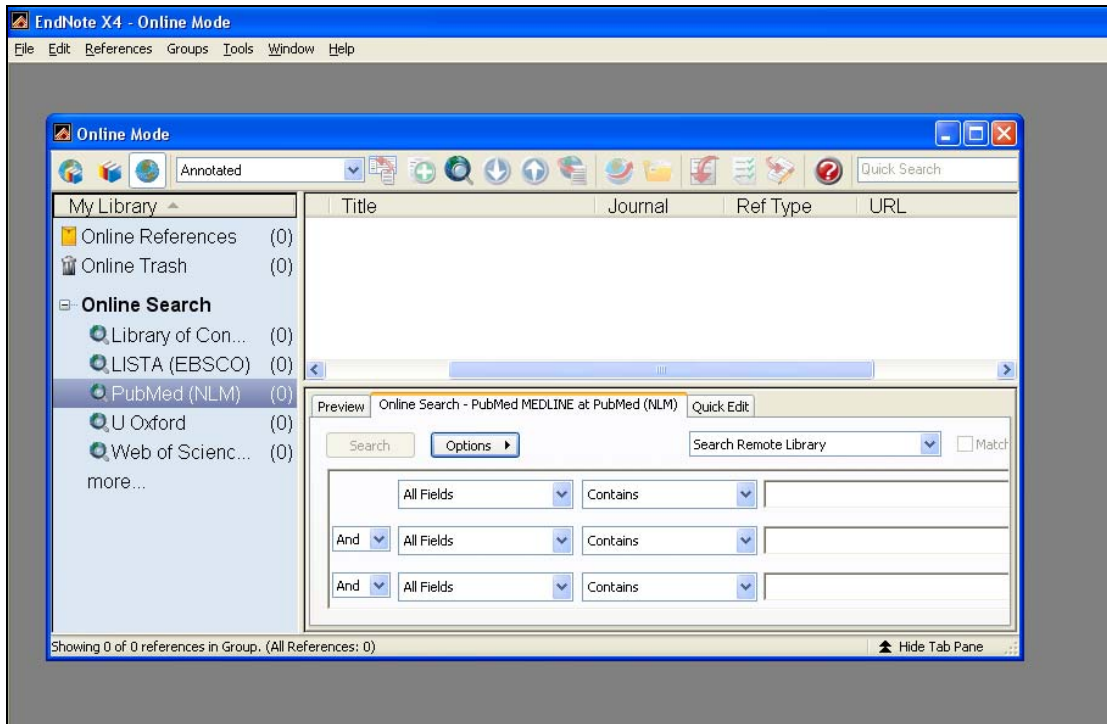
Connection Files List

Browse down the list of databases until you find the connection file which you require. All connection files from the UQ Library *EndNote Online Search* page have filenames beginning with **uq_...**

Highlight the file, then click the **Choose** button, and EndNote will use your Internet connection to access the database. You must have a connection to the Internet currently open in order to use the EndNote Online Search function.

You may be asked to enter a *user ID* and *password*. If so, enter these now.

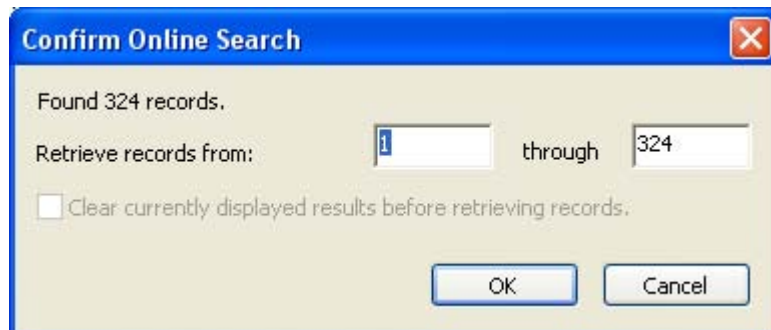
When the connection to the database is successfully established, EndNote opens an **Online Search** dialogue in the **Tab Pane** of the library window:



Online Search

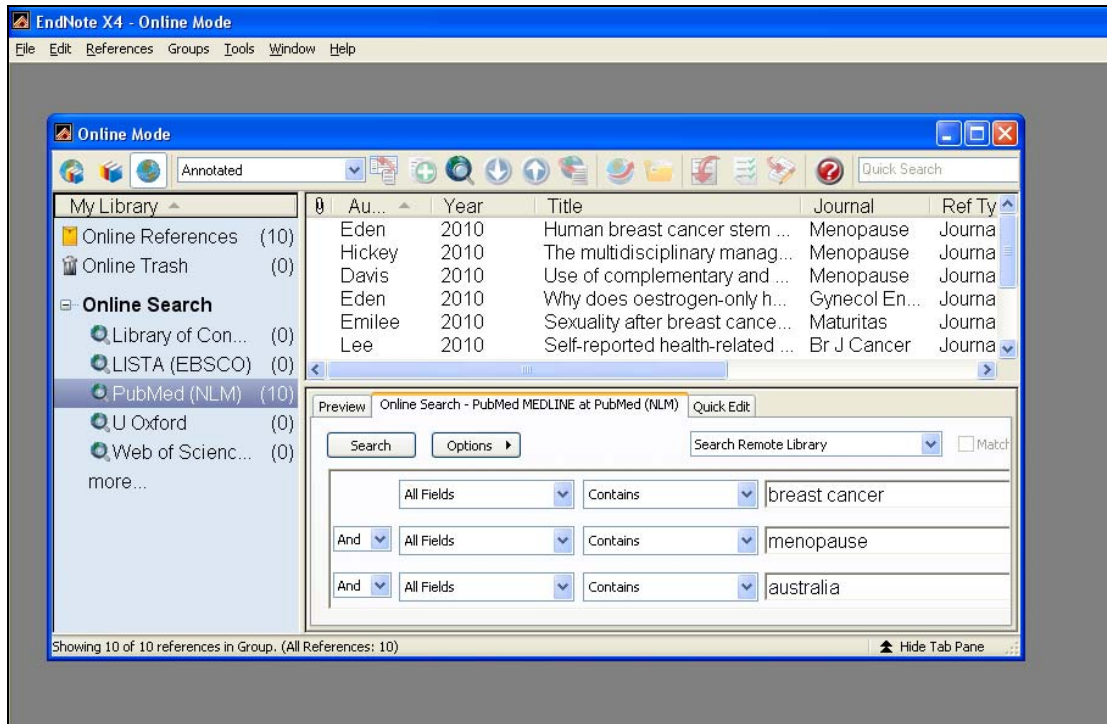
Enter a search term in the first search box. If required, you can go down to the next line, select the appropriate Boolean operator, and enter a further search term.

Now click on the **Search** button, and you will see a dialogue box stating the number of references which match your search:



"Confirm Online Search" Dialogue Box

To retrieve the first ten references, change the figure in the second box to 10. Then click on the **OK** button and the references will be displayed in the library window, although the references have not yet been added to your library:



Online Search Results

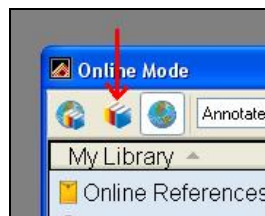
You can double-click on any of these references to open them and view the full details.

Select the references that you would like to transfer to your library by holding down the **Ctrl** key and clicking on the required references. Click on the **Copy to Local Library**



button on the library toolbar. The references will be transferred to your library. If you wish to search the database again, go back down to the **Tab Pane** and enter the new search.

When you have finished searching, click on the **Local Library Mode** button to return to your library:



Mode Buttons

When you eventually close your library, EndNote will ask you *Are you sure you want to discard all online references?* You have already transferred into your library the references that you wanted to keep, so you can click on the **OK** button.

More on connection files ...

When searching, Boolean operators are processed strictly in the order of input. So if you are looking for material on "Forestry in Indonesia and Malaysia", you must construct your search as "Indonesia OR Malaysia AND forestry". If you input the search "forestry AND Indonesia OR Malaysia" you will retrieve every record on the database which includes the term "Malaysia".

As with filters, the connection files do not always import data accurately. All references should be checked after import.

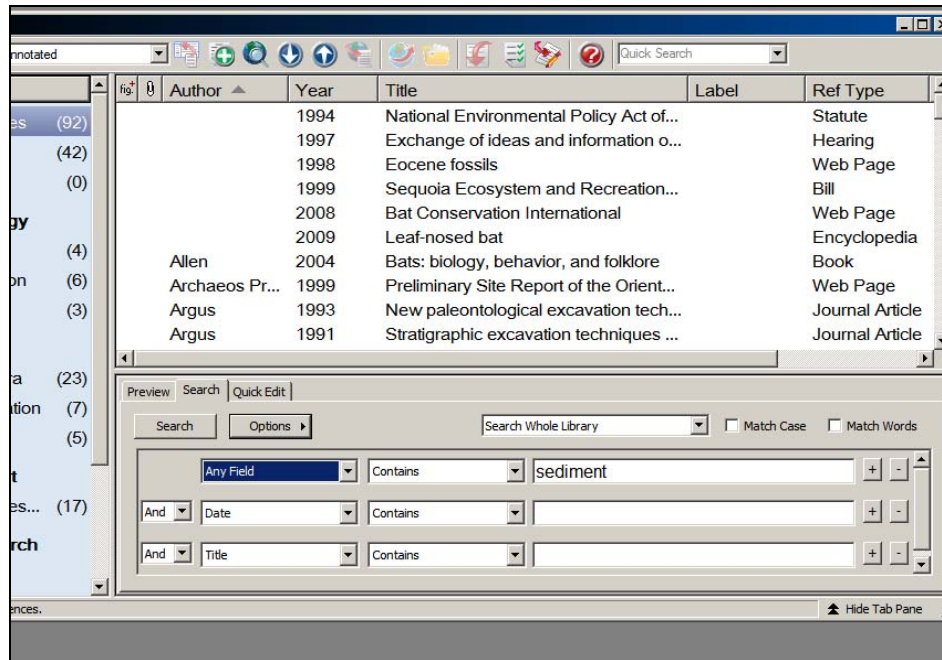
11. Searching an EndNote Library

At the end of the toolbar at the top of the library window is the **Quick Search** box. You can type some text here, and EndNote will look for those letters anywhere in the library.

EndNote also provides a more sophisticated search function. We will practise using this, searching the **Sample Library** which is provided with the software.

If the Tab Pane at the bottom of the library window is not open, click on **Show Tab Pane**. In the Tab Pane, click on the **Search** tab to display the Search dialogue box. We have already used this to conduct an Online Search, but now we are using it to search an EndNote library.

Type the word *sediment* in the first search box. Make sure that the Field box is showing **Any Field**:



Searching an EndNote Library

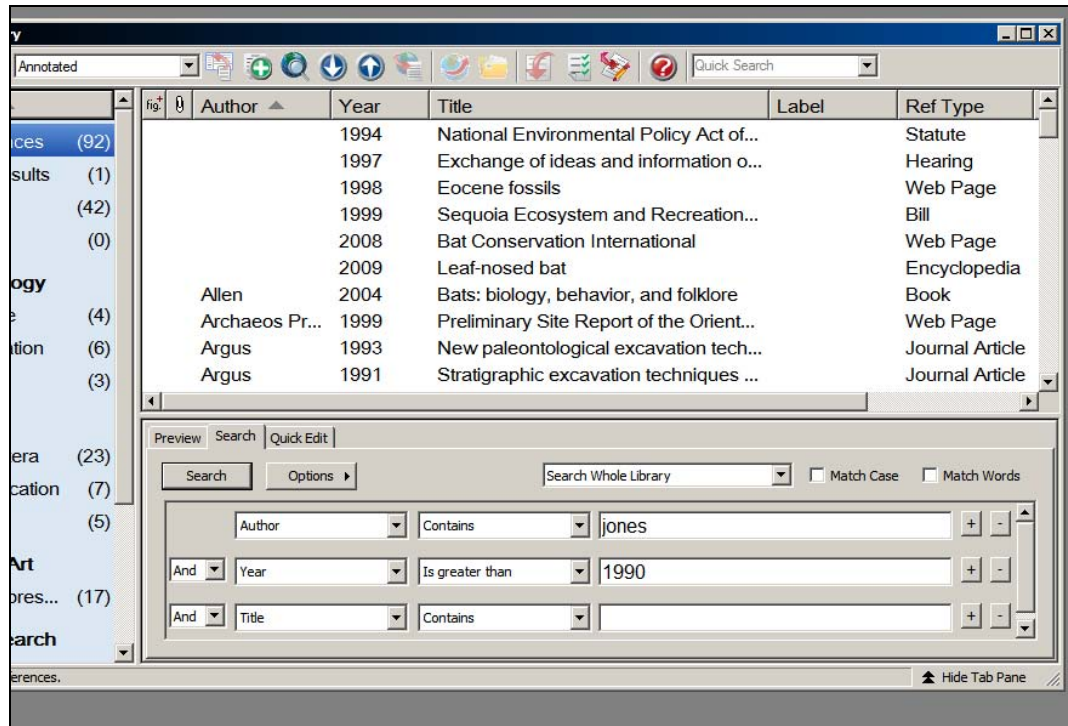
Note that we have not checked the **Match Words** box. This means that we are searching for the string of letters *sediment* and not just for the word *sediment*.

Click on the **Search** button.

The results of your search will be displayed in the main part of the library window. Note that these include references containing words like *sedimentary*, *sedimentology*. This is because we did not check the **Match Words** option in the search dialogue.

Let's do a slightly more complicated search. Assume we wish to find all references by the author *Jones* that were published after 1990. This means that we wish to find references which have *jones* in the Author field, and a number greater than 1990 in the Year field.

Go back to the Search dialogue in the Tab Pane. In the first search box, click on the first arrow to select the **Author** field, and then type *jones* as the search term. At the beginning of the next row, make sure that **And** is selected as the Boolean operator. In the box beside it, use the arrow to select the **Year** field. In the box beside that, use the arrow to select **Is greater than**. Enter 1990 as the search term. The screen should look like this:



Constructing a Complex Search of an EndNote Library

Click on the **Search** button and you should retrieve a result. Open the reference and you will find that it has Jones as a collaborating author.

12. Sorting an EndNote Library



When you open a library, it automatically sorts itself alphabetically by author. However you can sort your references on any of the fields in the record, e.g. author, title, year, label.

You might want to sort your library by year of publication, with the most recent references appearing first. To do this, click on the column-heading **Year** near the top of the library window.

This will sort the references with the oldest references appearing first. Click on **Year** again, and the order is reversed. Now the most recent references appear first.

For more complex sorting, click on **Tools** on the top menu bar, and select **Sort Library**. This will display a dialog box where you can select fields.

At the end of the search boxes is a button which indicates whether you wish to sort items

from smallest to largest  or from largest to smallest . Click on this button to reverse the sort order.

13. Producing a Bibliography or Reading List

What is an output style?

An EndNote output style (often just referred to as a "style") is a piece of software that will convert the data in your library into formatted references that correspond to the bibliographical styles used by journal publishers or specified in style manuals such as the Chicago Manual of Style.

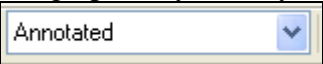
A range of output styles is supplied with the software, and hundreds more styles can be downloaded from the EndNote website, so there is a good chance that you will find one suitable for your needs. If not, EndNote allows you to create your own output styles or edit an existing output style.

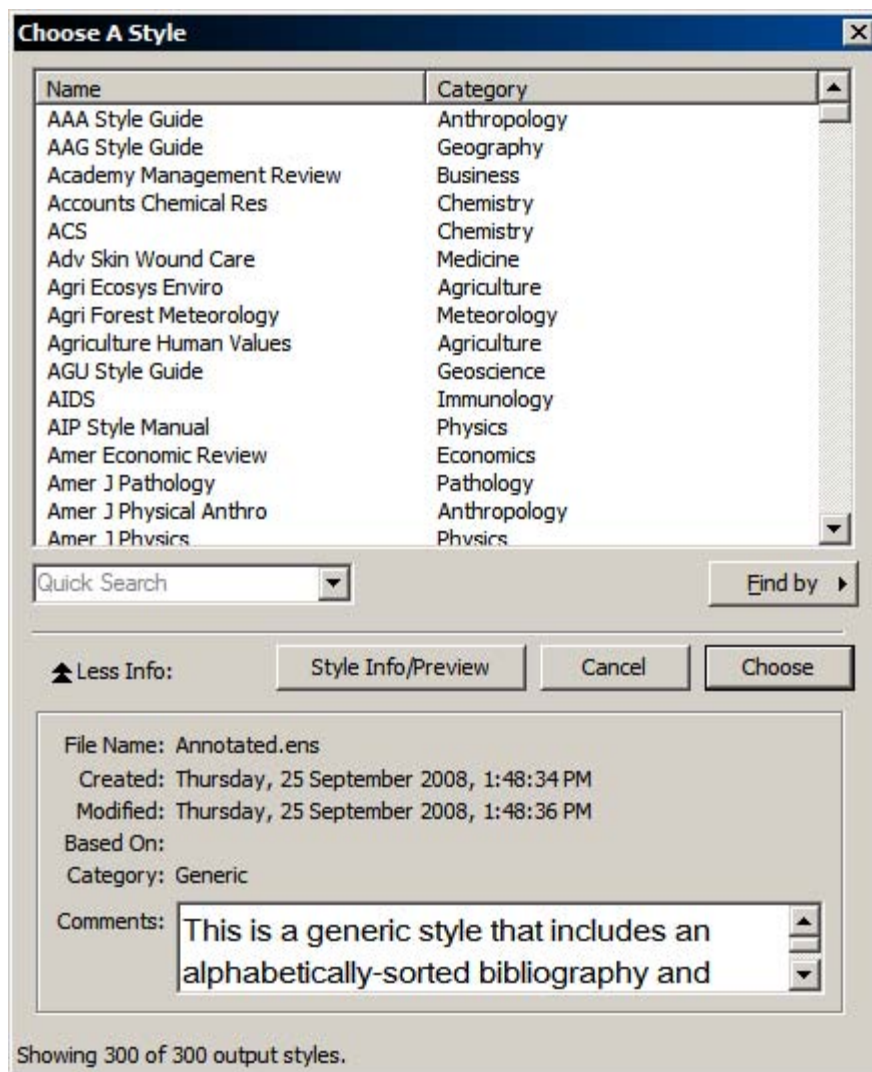
We will now look at using EndNote to produce bibliographies. To begin, we consider how to use the references in your library to generate a reading list for students, or a list of references for a colleague, or perhaps a list of your own publications for your CV.

While holding down the **Ctrl** key, select about five references from your library.

Click on **References** on the top menu bar and then click on **Show Selected References**. You should now be able to see only those references which you selected.

Now you have to decide on the bibliographic style that you wish to use for your

references. Go to the style menu  on the library toolbar and click on the arrow. You will see a list of the four basic EndNote styles. Click on **Select Another Style** to open the complete list of output styles which are supplied with the EndNote software:



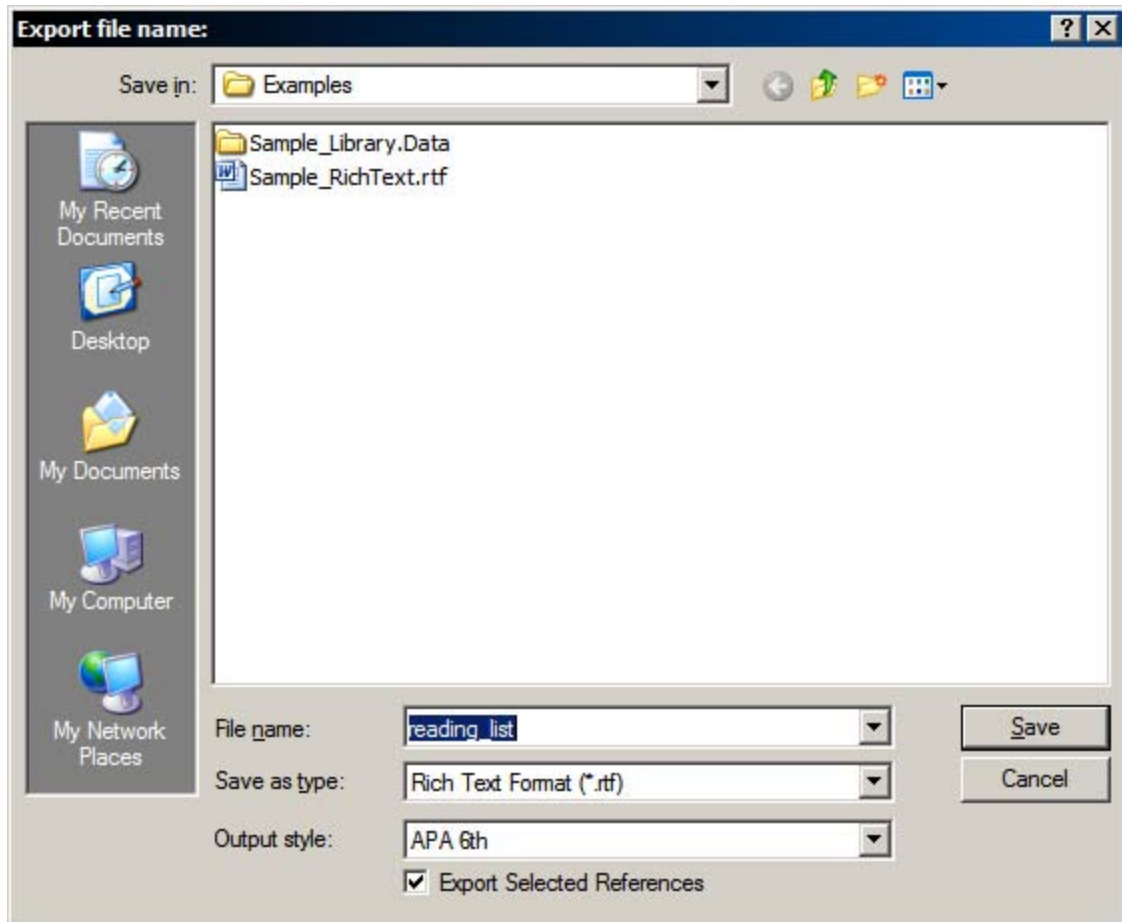
Output Styles List

Find a style that would be useful in your subject area, and then click on it to highlight it. Click on the **Choose** button to select that style.

This will return you to the library window, with only your selected references showing. To generate a bibliography from these references, using the style that you have just

selected, click on the Export button  on the library toolbar.

You will now see a dialogue box. **Save** the exported references to a convenient folder. In the **Save as type** box, click on the arrow to select **Rich Text Format**. In the **Output Style** box, make sure that your chosen style is selected:



Exporting a Bibliography

Click on the **Save** button.

To view the bibliography, open your word processor and then open the file which you have just saved.

14. Using EndNote with a Word Processor

Is my word processor compatible with EndNote X4?

For **Windows** users, EndNote X4 is compatible with Word 2010, Word 2007 and Word 2003, using Cite While You Write (as explained below). Cite While You Write is also compatible with Open Office.org Writer version 3. If you are using an earlier version of Word, or another word processor (such as WordPerfect), you must save your documents in Rich Text Format and use the Format Paper function (as explained in the EndNote help function).

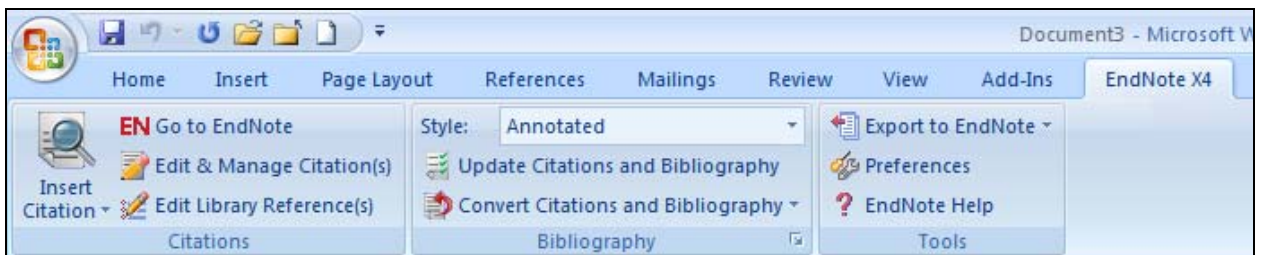
On the **Macintosh**, EndNote X4 is compatible with Word 2004 and Word 2008, using Cite While You Write (as explained below). EndNote is also integrated into Pages 09, with similar functionality to Cite While You Write. If you are using an earlier version of Word, or another word processor, you must save your documents in Rich Text Format and use the Format Paper function (as explained in the EndNote help function).

We have just seen how to use EndNote to create an independent bibliography, but EndNote can also work in conjunction with your word processor, so that you can insert references as you type a document, and automatically generate the bibliography.

If you have a compatible version of Microsoft Word (Windows or Macintosh) installed on your computer, when you install the EndNote software extra files will be inserted into your word processing software. These are the **Cite While You Write** add-in. The appearance of the EndNote tools in Word will vary, depending on the version of Word which you are using. In this guide, we are using **Word 2007**.

If you are using **Word 2003**, the EndNote commands appear on a toolbar in Word. Generally they work the same way as the EndNote commands on the Word 2007 ribbon.

Open Word 2007, and you will see an **EndNote** tab on the ribbon. Click on the EndNote tab to see the EndNote tools:



The EndNote Tools Menu in Microsoft Word 2007

We will now practise using Cite While You Write by adding some references to a sample paper. You can use any Word document (preferably a short document) to practise this. Insert references from the library which you have already created, or use the **Sample Library**.

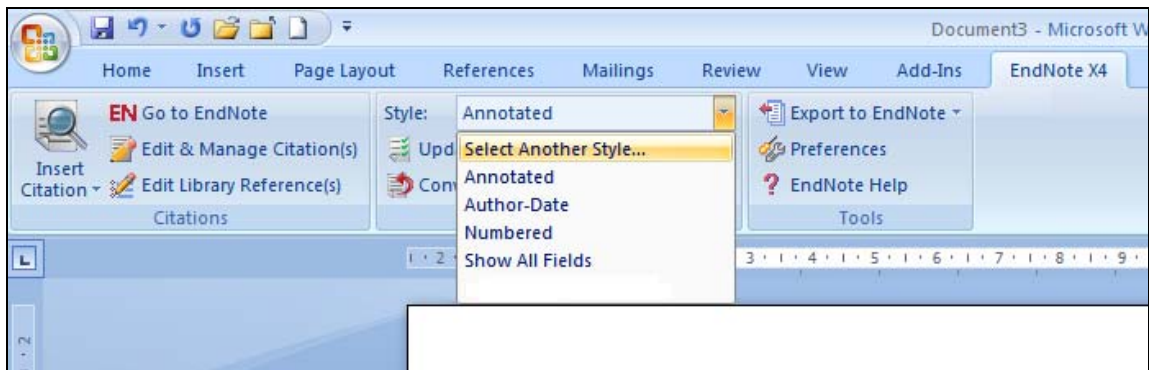
a. Formatting References in an Author-Date Style

What is an "author-date style"?

The Harvard Style is the best-known author-date style, but there are many variations. In the text of the paper, the reference is cited in an abbreviated form similar to " ... (Smith, 1993)". In the list of references at the end of the paper, references are given in full and listed alphabetically by author.

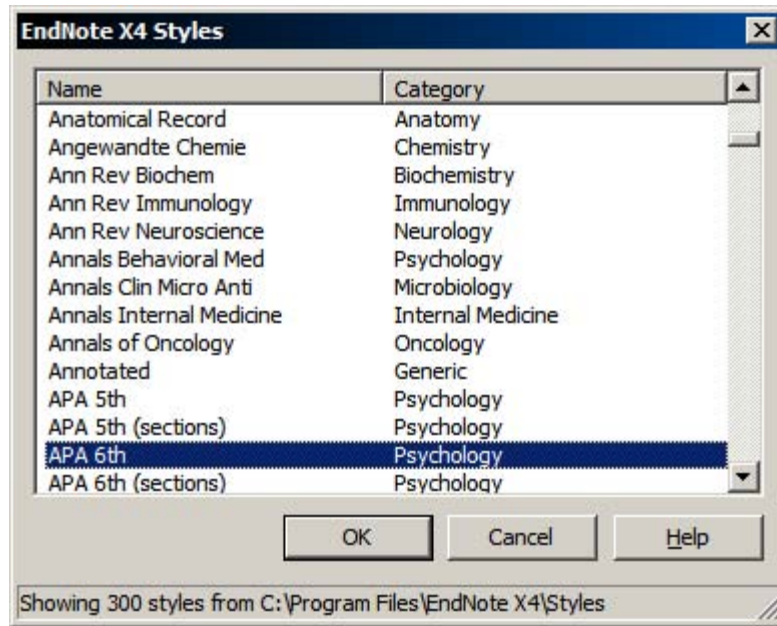
Open your Word document.

First you need to select the output style. We will practise using the APA style. To change the style to APA, go to the styles manager on the ribbon and choose **Select Another Style**:



Styles Manager in Word

This will display the complete list of styles. If necessary, click on the **Name** bar to sort the list by the name of the style. Then browse down to *APA 6th* and click on the **OK** button:



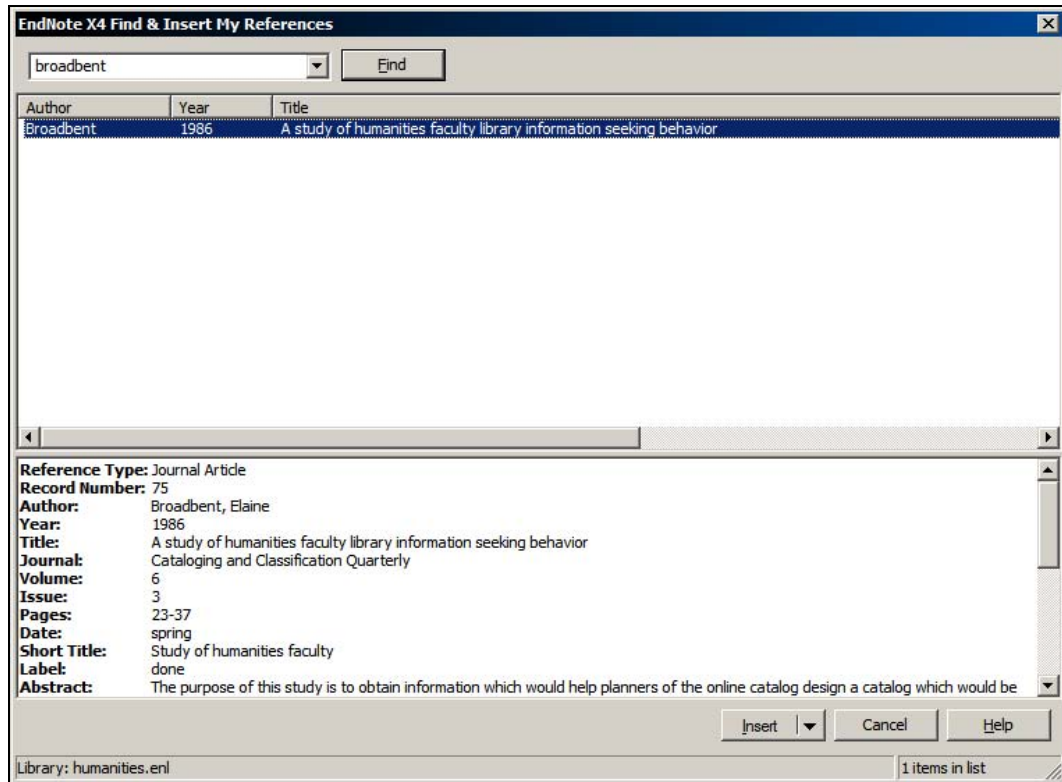
Selecting an Output Style

Now start inserting references. Go to the end of the first sentence of your document, where we will insert our first reference, and insert a space before the full stop.



Click on the **Insert Citation** button on the ribbon. This opens a search window.

Think of a reference which you wish to cite from your library. Enter the author's name in the search box, and click on the **Search** button. EndNote will display the matching references:



The "Find Citations" Search Window

Highlight the required reference and click on the **Insert** button, and this reference will be inserted into your document.

EndNote will instantly format the citation in the text and produce a list of references at the end of the document using the style which is currently selected.

Your document might now look something like this:

We still know very little about how researchers in many areas identify the information resources that they need (Broadbent, 1986). The available studies are often localised or discipline-specific. There is a clear and pressing need for further research in this area, and a need for detailed longitudinal studies that will help to identify emerging trends.

Budd pointed out many years ago that there are fundamental differences in the research cultures of the sciences and the humanities. There is nothing in the more recent literature to suggest that his findings have lost validity over the years. On the contrary, it may well be that recent technological developments have increased these differences.

References


Broadbent, E. (1986). A study of humanities faculty library information seeking behavior. *Cataloging and Classification Quarterly*, 6(3), 23-37.

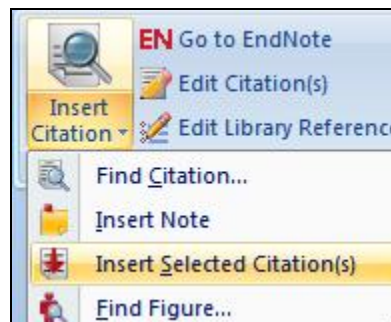
Manuscript with Reference in APA Style

We shall now add some more references to this paper.


At the end of the second sentence in your Word document, insert a space before the full stop and again click on the **Insert Citation** button. Search for another reference, using the author's name or some words from the title. Select and highlight a reference, and click on the **Insert** button.

Continue adding references to your document in this manner. As an alternative to using the Find Citations command, you can click on the **Go to EndNote** button

 on the ribbon and select references directly from your library. Highlight a reference in the library window and return to Word. Then use the **Insert Citation** button on the ribbon and click on the arrow to choose **Insert Selected Citation(s)**:



Another option is to select references directly from your EndNote library, and use the

Insert Citation button  at the top of the library window to insert the citation into your Word document.

Save the changes that you have made to your paper.

b. Formatting References in a Numbered Style

What is a "numbered style"?

In a numbered style, references are indicated by a number in the text. The number is often printed as a superscript. At the end of the paper, the references are given in full and arranged by the numbers which they have been assigned.

Do not confuse a numbered style with a footnote (or endnote) style. With a footnote/endnote style, it is the footnotes/endnotes which are numbered. The references are then inserted into the footnotes/endnotes, along with other text.

Using the paper that you have already formatted, we will change the style to a **numbered style**. This situation could arise if you decided to submit the article to a different journal.

Use the **styles manager** on the ribbon (as explained above) to select another style. Choose the *Nature* style. EndNote will reformat the paper in the new style. It might now look something like this:

We still know very little about how researchers in many areas identify the information resources that they need¹. The available studies are often localised² or discipline-specific³. There is a clear and pressing need for further research in this area, and a need for detailed longitudinal studies that will help to identify emerging trends.

Budd pointed out many years ago that there are fundamental differences in the research cultures of the sciences and the humanities. There is nothing in the more recent literature to suggest that his findings have lost validity over the years. On the contrary, it may well be that recent technological developments have increased these differences.

References

- ¹ Broadbent, E. A study of humanities faculty library information seeking behavior. *Cataloging and Classification Quarterly* **6**, 23-37 (1986).
- ² Gould, C. C. *Information Needs in the Humanities: An Assessment*. (Research Libraries Group, 1988).
- ³ Talja, S. & Maula, H. Reasons for the use and non-use of electronic journals and databases: A domain analytic study in four scholarly disciplines. *Journal of Documentation* **59**, 673-691 (2003).

Manuscript with References in Nature Style

c. Formatting References in a Footnote/Endnote Style

Using EndNote with footnotes or endnotes is a little more complicated. See the FAQ on the UQ Library EndNote website at:

<http://www.library.uq.edu.au/endnote/footnote.html>

15. More on Formatting Documents

We will now look at some special situations which may arise when formatting a paper with EndNote.

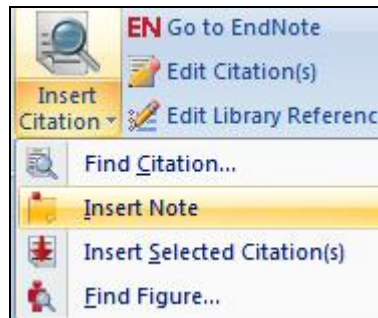
a. Including Notes in the List of References

This is only applicable to **numbered styles**.

Some journals (such as *Science*) use a numbered reference style but permit you to include notes with the list of works cited at the end of the paper. In such a system, the notes are incorporated into the numbered list of references.

To insert such a note in your Word document, first use the styles manager to select the *Science* style.

Now position the cursor at the end of a sentence in the document and insert a space before the full stop. Then use the **Insert Citation** button on the ribbon and click on the arrow to select **Insert Note**:



You will now see a dialogue box, in which you can type your note. Enter the following text:

These results are only preliminary.

Then click on the **OK** button.

EndNote inserts the note into the list of references. **Save** this change. Your document might now look something like this:

We still know very little about how researchers in many areas identify the information resources that they need (1). The available studies are often localised (2) or discipline-specific (3). There is a clear and pressing need for further research in this area, and a need for detailed longitudinal studies that will help to identify emerging trends.

Budd pointed out many years ago that there are fundamental differences in the research cultures of the sciences and the humanities. There is nothing in the more recent literature to suggest that his findings have lost validity over the years (4). On the contrary, it may well be that recent technological developments have increased these differences (5).

Works Cited

1. E. Broadbent, *Cataloging and Classification Quarterly* **6**, 23 (1986).
2. C. C. Gould, *Information Needs in the Humanities: An Assessment*. (Research Libraries Group, Stanford, Calif., 1988).
3. S. Talja, H. Maula, *Journal of Documentation* **59**, 673 (2003).
4. These results are only preliminary.
5. K. M. Guthrie, *Journal of Library Administration* **36**, 109 (2002).

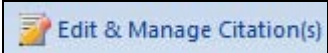
Numbered Style with Note in List of References

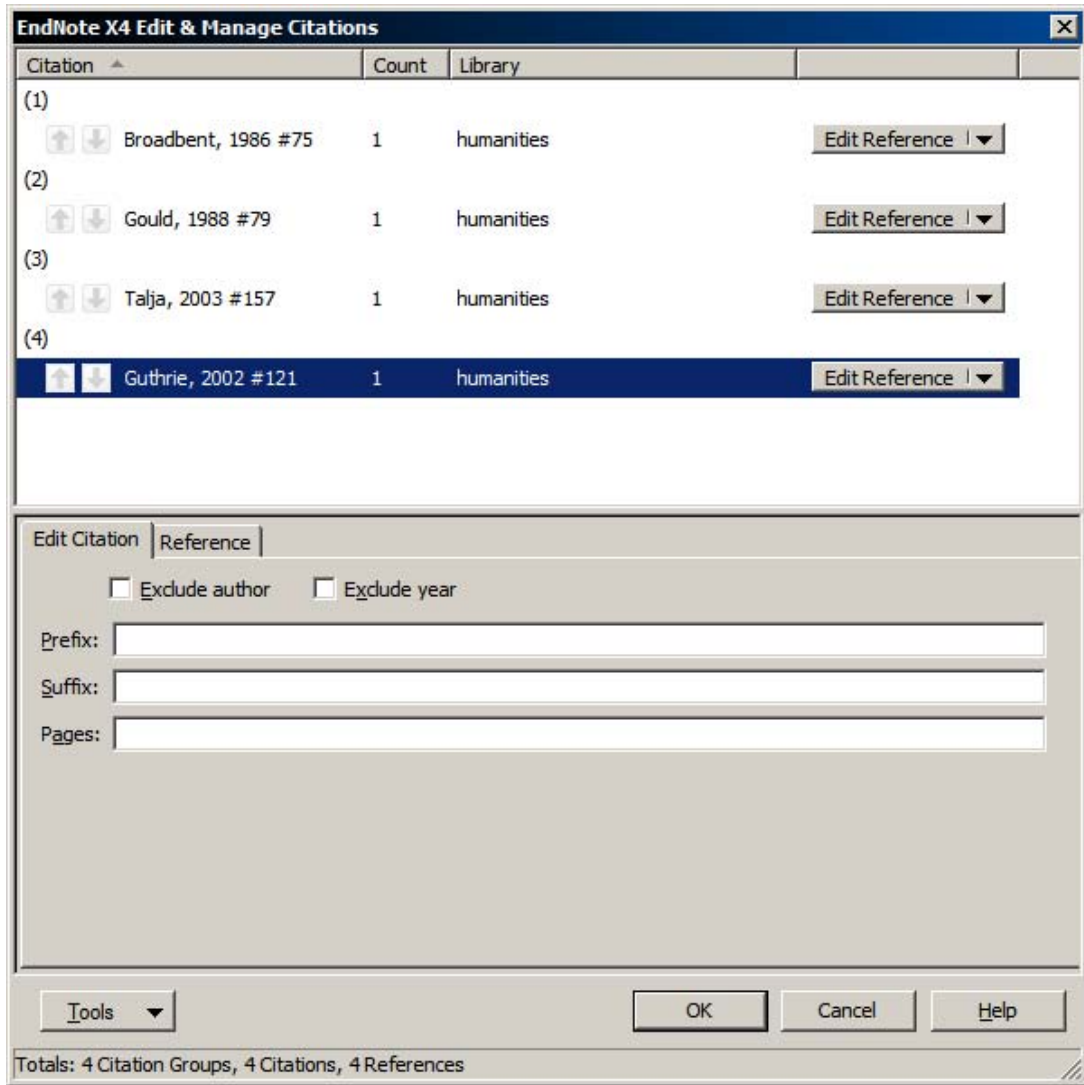
To **delete** this note, click on the relevant number in the text to highlight it. Use the **backspace** key to delete the highlighted text. (Note: Normally you would use the **Edit & Manage Citations** function to delete a note, but there seems to be a bug in EndNote X4 which prevents you from doing this.)

b. Deleting a Citation

To delete a citation, do *not* use the Delete or Backspace keys on the keyboard.

To delete a citation safely, first highlight the in-text citation (i.e. the author and year in an author-date style, or the number in a numbered style). Now click on the **Edit & Manage**

Citation(s) button  on the ribbon and you will see the following dialogue box:



The "Edit Citation" Dialogue Box

This will display all the citations in your paper. You will see the citations in EndNote's **temporary citation format** (first author, year, number of the reference in your library).

The citation which you selected should be highlighted. Click on the arrow on the **Edit Reference** button and select **Remove Citation**. Then click on the **OK** button.

EndNote will remove the citation and reformat the list of references. **Save** the changes to your document.

c. Adding Text before a Citation

This is only applicable to **author-date** styles.

Some styles allow you to add text before a citation in a paper. Your paper must be formatted in an author-date style, so use the **styles manager** to reformat the document with the *APA 6th* style or another author-date style.

Click on the in-text citation, e.g. (Jones, 1993), to highlight it.

Click on the **Edit & Manage Citation(s)** button on the ribbon and the dialogue box will open. In the box labelled **Prefix**, type:

see for example

You must type a space after “example” to ensure that there is a space between the prefixed text and the citation in the document. Click on the **OK** button, and EndNote will reformat the citation with the prefixed text.

As an example, see the first reference below:

We still know very little about how researchers in many areas identify the information resources that they need (see for example Broadbent, 1986). The available studies are often localised (Gould, 1988) or discipline-specific (Talja & Maula, 2003). There is a clear and pressing need for further research in this area, and a need for detailed longitudinal studies that will help to identify emerging trends.

Budd pointed out many years ago that there are fundamental differences in the research cultures of the sciences and the humanities. There is nothing in the more recent literature to suggest that his findings have lost validity over the years. On the contrary, it may well be that recent technological developments have increased these differences (Guthrie, 2002).

Works Cited

Broadbent, E. (1986). A study of humanities faculty library information seeking behavior. *Cataloging and Classification Quarterly*, 6(3), 23-37.

Gould, C. C. (1988). *Information Needs in the Humanities: An Assessment*. Stanford, Calif.: Research Libraries Group.

In-Text Citation with Prefixed Text

Save this change to your document.

d. Adding Text after a Citation

This is only applicable to **author-date styles**.

Some styles allow you to add text after a citation. Normally this will be a specific page number. Your paper must be formatted in an author-date style.

Click on the in-text citation, e.g. (Jones, 1993), to highlight it.

Click on the **Edit & Manage Citation(s)** button on the ribbon and the dialogue box will open. In the box labelled **Suffix** type:

p. 11

You must type a space before “p.” to ensure that there is a space between the citation in the document and the suffix. Click on the **OK** button, and EndNote will reformat the citation with the text after the citation.

As an example, see the second reference below:

We still know very little about how researchers in many areas identify the information resources that they need (see for example Broadbent, 1986). The available studies are often localised (Gould, 1988 p. 11) or discipline-specific (Talja & Maula, 2003). There is a clear and pressing need for further research in this area, and a need for detailed longitudinal studies that will help to identify emerging trends.

Budd pointed out many years ago that there are fundamental differences in the research cultures of the sciences and the humanities. There is nothing in the more recent literature to suggest that his findings have lost validity over the years. On the contrary, it may well be that recent technological developments have increased these differences (Guthrie, 2002).

Works Cited

Broadbent, E. (1986). A study of humanities faculty library information seeking behavior. *Cataloging and Classification Quarterly*, 6(3), 23-37.

Gould, C. C. (1988). *Information Needs in the Humanities: An Assessment*. Stanford, Calif.: Research Libraries Group.

In-Text Citation with Suffix Text

Save this change to your document.

Why can't I just enter the page number in the Pages box?

When you click on the Edit Citations button, the dialogue box which appears has sections for Prefix, Suffix, and Pages. It seems logical to enter a page number in the Pages box.

In earlier versions of EndNote, the Pages box was used only for footnote styles. It was not used for author-date styles such as APA or Harvard. In recent versions of EndNote, some author-date output styles (e.g. APA 6th) are configured so that you can just enter a page number in the Pages box, and EndNote will format the reference and add all the necessary punctuation for you.

e. Omitting Authors' Names from Citations

This is only applicable to **author-date styles**.

Most style manuals insist that if you have mentioned the author's name in the text, you should drop the author's name from the citation, e.g.

These results were confirmed by Smith (1993).

This can easily be done with EndNote.

When you first insert the reference, it will look something like this:

These results were confirmed by Smith (Smith, 1993).


To remove the author's name from the citation, click on the citation to highlight it, then click on the **Edit & Manage Citation(s)** button on the ribbon.

When the dialogue box opens, check the box labelled **Exclude author** then click on the **OK** button. EndNote will remove the author's name from the citation.

Save this change to your document.

f. Correcting Details in a Reference

When you see the references formatted in your bibliography, you may notice errors that you made when entering the details in your EndNote library. To correct these errors, go back to your EndNote library, open the reference, and correct it. Then close the reference to save the changes.

To correct the reference in your Word document, click on the **Update Citations and Bibliography** button  on the ribbon. EndNote will format the references again and the bibliography will be corrected.

g. Removing the Field Codes

What is the "traveling library"?

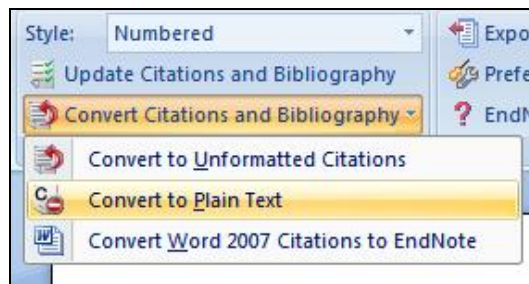
Although your document looks like a normal Word document, it is not. It contains field codes which include most of the data from your EndNote library relating to each of the references which you have cited. This stored data is called the Traveling Library.

If you are collaborating with colleagues who also use a recent version of EndNote and a recent version of Word, you can send them your formatted Word document and they can add text and references to it from their own EndNote libraries. They can format the amended document because all data relating to your references are stored in the Traveling Library.

Beware: When sharing documents with a colleague, your colleague must be using a compatible version of EndNote. Recent versions of EndNote are not compatible with EndNote 7 and earlier versions.

If you wish to submit your paper for publication, you must first **remove all field codes**, as they could interfere with the software used by the publisher.

Go to the **Convert Citations and Bibliography** button on the ribbon and click on the arrow to select **Convert to Plain Text**:



You will see a warning message, explaining that this will preserve your original document (with EndNote field codes) and create a new, unsaved document (without EndNote field codes). Click on the **OK** button to continue.

Save the new document under a new name, and send that version for publication.

Keep the original document, as that it is the master copy which you will have to use if you wish to add or remove any references using EndNote.

16. Useful Web Addresses

UQ Library Endnote Site

<http://www.library.uq.edu.au/endnote/>

- Extra filters, connection files and styles
- Answers to frequently asked questions
- Journal term lists for medicine, biosciences, chemistry and ancient history

Official EndNote Site

<http://www.endnote.com/>

- Updates and patches for the EndNote software
- Answers to frequently asked questions
- Video tutorials on using EndNote
- Extra filters, connection files and styles
- Style Finder

EndNote Discussion Forums

<http://forums.thomsonscientific.com/ts/>

- Communicate with other EndNote users
- Search previous postings
- Make suggestions for improvements to EndNote