Basic use of

EndNote

Desktop

For information about downloading the program,
and **a more extensive guide on using EndNote**, go to
http://www.uib.no/en/ub/79568/endnote-and-other-referencing-tools

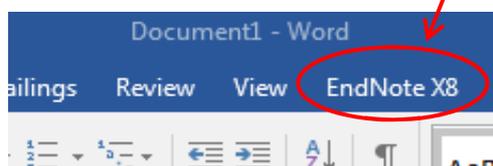Here you will find parallel guides for Windows and Mac (in Norwegian).

3 important tips when using the program:

1. How you open the program / EndNote-library:

It is recommended to open the program

 * from the Start Menu
(Flag-symbol on Windows, Finder on Mac)
        or
 * from Word (by opening the EndNote-tab)
   and then click *Go to Endnote*)

You should ***not*** open the library-file directly by double-clicking the library-icon.
The library-file will open when you open the program.

2. An EndNote-library consists of two elements

When you create an EndNote-library an .enl –file and a Data-folder with identical names
appear on your computer.
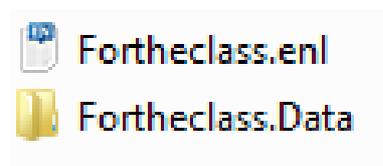
For the EN-library to function, both the elements need to be saved in the same folder/place on the computer, and they must have identical names. If you move the .enl-file, you must also move the Data-folder. If you change the name of the .enl-file, you must make the same change in the name of the Data-folder.
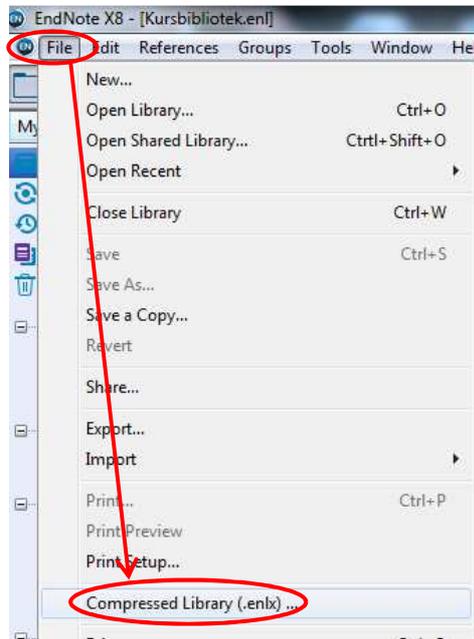
When you do a **back-up of the library** or you wish to send it as an attachment in an e-mail, you can save the library as a single **.enlx-file.**
(*File – Compressed Library*, - see image to the left)

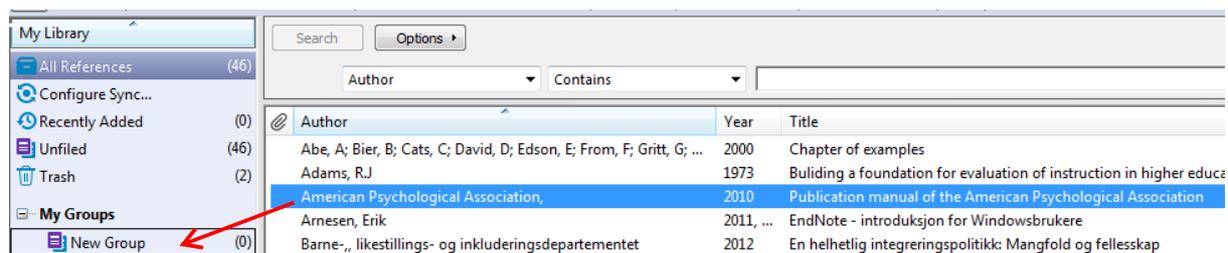Make sure to be in the group **All references** when you do this.

3. Try to limit yourself to *one* EndNote-library!

You can create groups and group sets in your EndNote-library, if you wish to organize your references by projects.

One way to place references in a group is to highlight the reference and use the drag & drop principle.

You can give the group a name (right-click on the default name "New Group").

Entering references manually

It is necessary to know how to enter references manually in case it isn't possible to import the references from a database.

Understanding how to enter a reference correctly will be useful when you need to make the necessary corrections in those cases where reference information isn't transferred correctlyfrom a database.

Choose «New Reference» from the menu References or click the button [icon].
Choose the right reference type from the drop-down menu and fill in the relevant fields.
The different reference types will contain different types of fields.
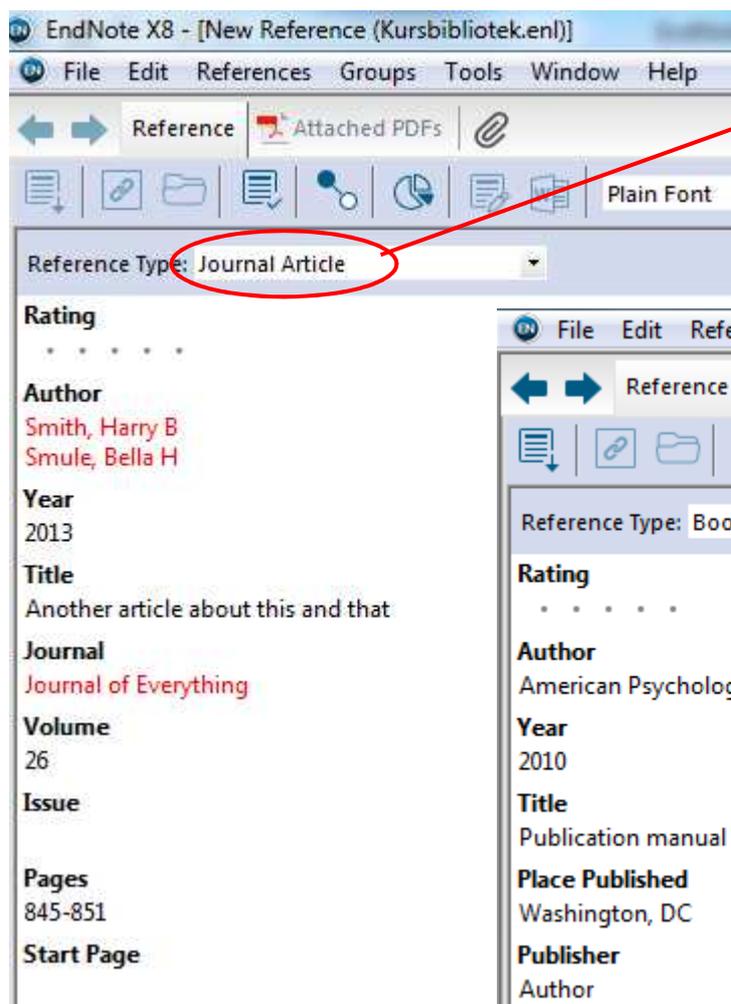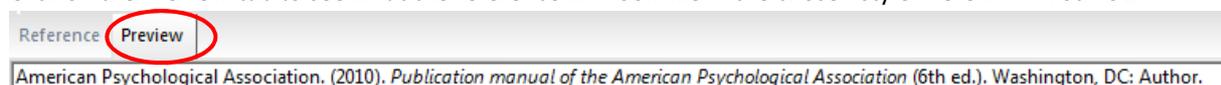

Choose the reference type *Electronic Article* if the reference needs to have an URL in the reference list.
The APA6th-style demands this if an article is found electronically and doesn't have a doi-number.
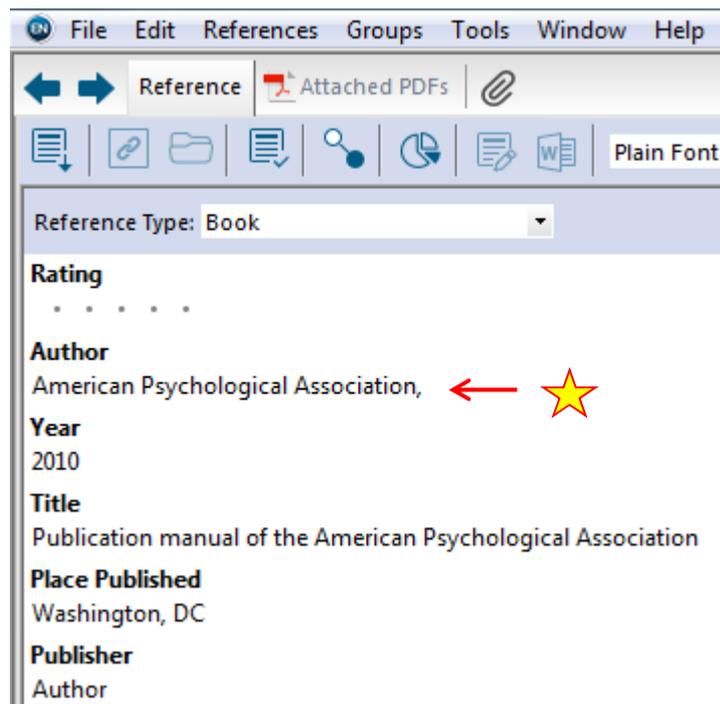
- You need to choose the right reference type before filling in the fields.
- Place the names of authors/editors below one another.
- Main rule: end a field with the cursor after the last letter/number
- Exception: when the author is an organization you end with a comma after the last letter.

Click on the Preview-tab to see what the reference will look like in the chosen style. Here in APA 6th-UB:

American Psychological Association. (2010). *Publication manual of the American Psychological Association* (6th ed.). Washington, DC: Author.

Exporting references from databases / search engines, such as Oria

Clicking the 3 dots in the right corner will give you more alternatives. Choose **ENDNOTE DESKTOP**.
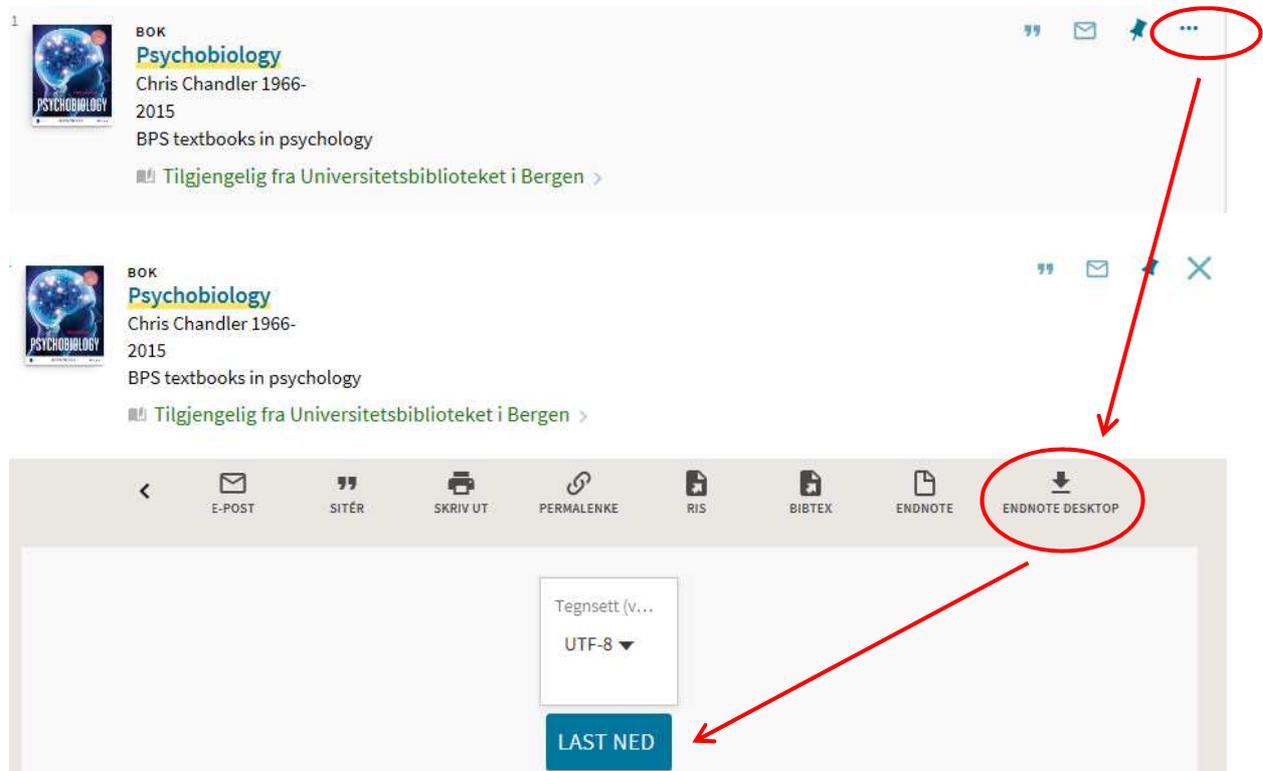
If you are given the choice between *Open* and *Save*, always choose *Open* for a direct export to EndNote Desktop.

Other data bases may have other ways to export references to Endnote. You will find much information in the UiB tutorial on EndNote (Norwegian only)
http://www.ub.uib.no/ref-prog/endnote/import/index.htm

There is also a lot of help to be found searching online.

After an Export from a data base to EndNote you should always check the Preview-field (see bottom of p. 3) for the quality of information exported.

Unfortunately it is common that not all required information for a correct reference is transferred, or that information is placed in incorrect fields. This results in the reference not being presented correctly.

You can move information between fields, delete or add information to the registration form to make the reference appear correctly according to the chosen style (for example APA 6th)

Always check the Preview-field!

- ACM Digital Library
- AMED - Allied and Complementary Medicine
- ArticleFirst (OCLC)
- ASFA
- BioOne
- CINAHL
- Cochrane library - evidence-based medicine
- ebrary - elektronisk bøker
- EMBASE
- ERIC
- GeoRef
- Google Books
- Google Scholar
- IEEE Xplore Digital Library
- Idunn
- JSTOR
- MathSciNet (AMS)
- MLA International Bibliography
- Norart - Norske tidsskriftartikler
- OCLC ArticleFirst
- OCLC WorldCat
- Oria
- ProQuest Academic Research Library
- PsycARTICLES
- PsycBOOKS
- PsycINFO
- PubMed (Medline)
- PubPsych
- ScienceDirect
- SpringerLink
- SveMed+
- Web of Science
- WorldCat

Checking for duplicates

In this context, duplicates mean several references to the same work (article, chapter, book, etc.). These can become a problem if you cite different records of the same reference during the writing process. Then the reference might appear twice in the reference list, and you could experience discrepancies with regards to updates and other things.

Therefore it is always recommended to check for duplicates in the library when you have imported new references.

- Make sure the group "All references" is selected.
- Choose "References", and then "Find Duplicates"
- A box will appear where the duplicates will be presented one at a time. The reference on the left will be the one that was first added to the EndNote-library. The fields that contain different content will be marked, so you can easily evaluate what information to copy.
- Look through the duplicate references and decide in each case what you want to do:
    - o Skip = Keeps both references and moves on to the next pair of duplicates
    - o Cancel = Cancels the duplicate check
    - o Keep This Record = Keeps the reference below and deletes the other
- You can copy content from one of the references to the other, if there is useful information in the reference you wish to delete. Copy like you normally would, or use the drag-and-drop method.
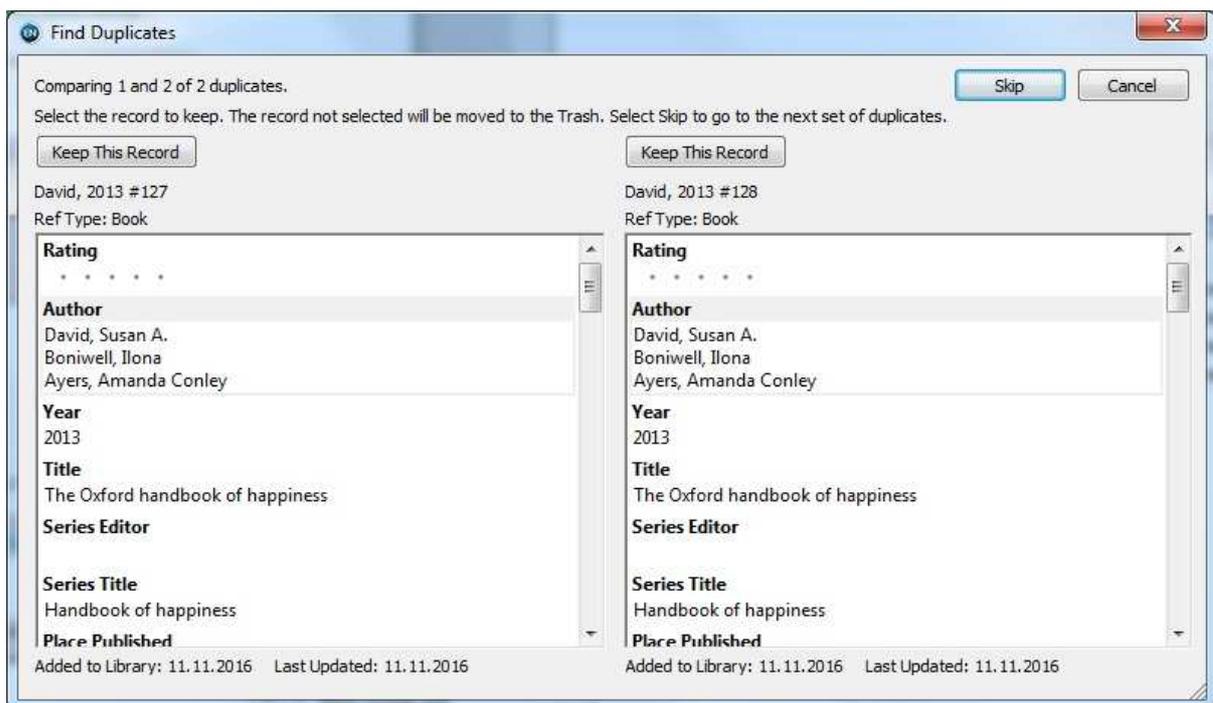
When you are done controlling for duplicates, a temporary group will have been created containing the references you skipped during the search and/or the ones remaining after cancelling the search. If you went through the whole list and removed all duplicates, the group should be empty.

## The interaction between Word and EndNote

Using *EndNote* with *Word* means that data from *EndNote* becomes connected to the text document in *Word*. The data is not transferred as a pure copy, there is a connection between the programs through codes in the *Word*-document. The connection will appear as gray fields when you click on a reference that was placed in the text, or if you click on the reference list. If you want to edit something in the gray fields, you must do it through the *EndNote* functionalities that are embedded in *Word* (see this symbol 🌟 on the next page). You cannot simply write or remove text in these fields, as you normally would in Word.

The user interface for the connection between Word and EndNote will look different depending on if which version of EndNote you are using, and if you are on a Macintosh or Windows computer.

Windows: Word has its own menu for EndNote in the toolbar (for both X7 and X8).
Mac: Version X7 – find the EndNote menu under the Tools-menu
                Version X8 – same as with Windows

**Features in *Word*** (as shown with EndNote X8 and Word 2016)

When *EndNote* is installed on the computer *Word* will have the tab *EndNote X8* or *EndNote* to the right on the Menu Bar.
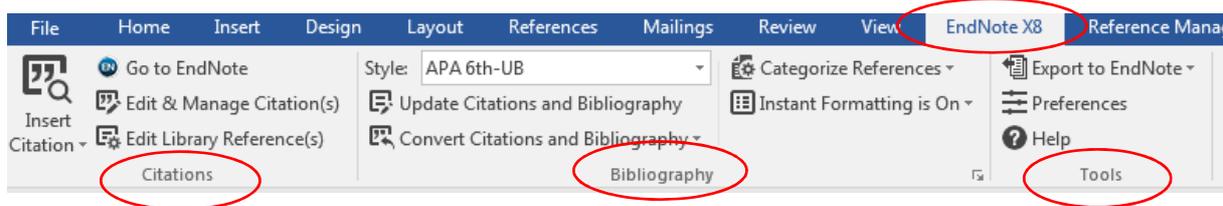

The features are grouped into three categories:

- *Citations* – is used to place and keep track of citations
- *Bibliography* – is used to format the reference list and/or format the document
- *Tools* –includes features such as exporting references from *Word*, preferences for *EndNote Cite While You Write* and a user manual (*Help*)

Some of the most used features are:
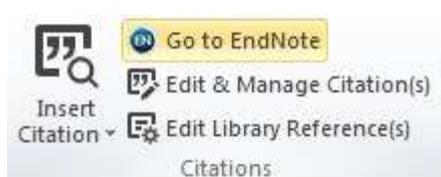
Here you will go from *Word* and straight into your *EndNote*-Library where you can mark the reference you want to place in the text. Click "insert citation" in EndNote (see page 8) to insert the citation in your word document.
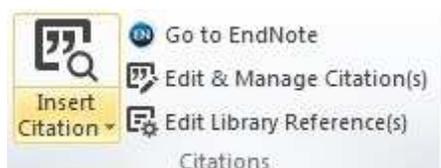

Or you can click on "Insert citation" which will open a new window where you can search for the name of the author, and place the reference you want in the text.
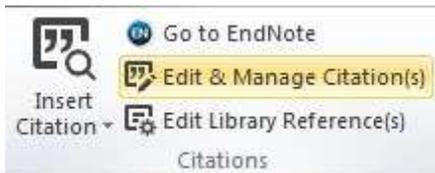
Here you can edit in the reference parentheses (the gray fields in the text) – for example remove the name of the author, add page numbers or other information in the suffix/prefix fields. This is also where you go to remove a reference from the text.
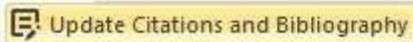
This is where you update the connection between the EndNote-library and the text in Word, for instance if you have made changes in a reference in the EndNote-library (like fixing spelling errors, added doi-number, etc.)
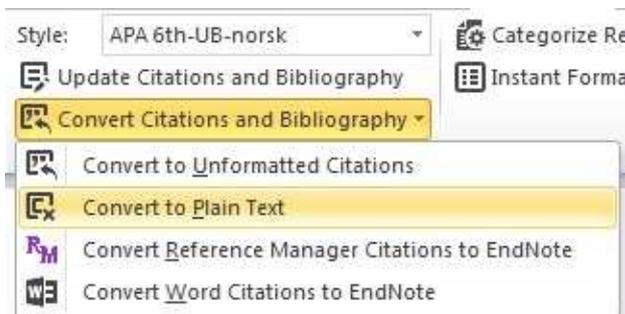
Here you can make a copy of your document that is without gray fields (EndNote codes). You will have a "clean" Word-document. Since the process cannot be reversed: **Remember to have saved a copy of your original document with the codes before you do this!**

In the document without EndNote-codes you can freely change details in the reference parentheses or the reference list (the previously gray fields), if necessary to achieve the right style (for instance APA6th).

Formatting the reference list in Word

Here you can check that the right style has been selected
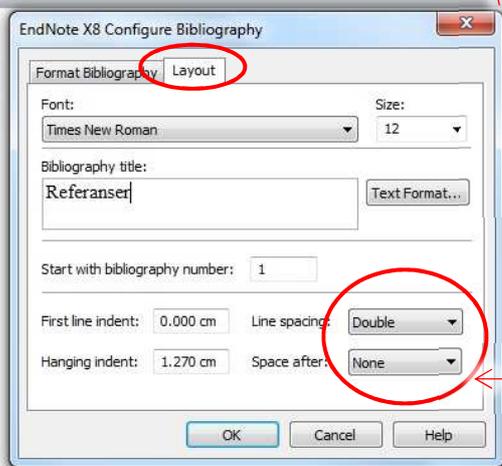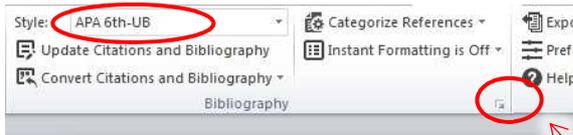
Click here and a new window will appear where you can edit the format of the reference list.

APA- style requires double line spacing with no extra space after each reference.

EndNote X8 Menu buttons

1.

Bibliographic Output Style

Here you choose the bibliographic output style: the style you want the references to look like when you use Export or Preview. If you use EndNote with Word you also need to choose the style there.

2.

New Reference (Ctrl+N)
Add a new reference to the selected group.

This is where you can add a New Reference manually. Be careful to choose the type of reference before you start filling in the fields, as you get different fields depending on the reference type.

3.

Insert Citation (Alt+2)
Insert a citation for each selected reference. You can insert up to 250 consecutive citations.

You use this button after you have clicked «Go to EndNote» in Word, and selected a reference in EndNote that you wish to insert into your Word document.

4.

Go To Word Processor (Alt+1)
Bring your word processor to the front of the screen.

This button takes you to Word.