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## 1. Getting started with EndNote X3

EndNote is a reference management service which is an invaluable aid for your research. EndNote allows you to:

- Store and organise references and images
- Create in-text citations in Word documents
- Create formatted bibliographies
- Import references from online databases and catalogues.

EndNote is available on all the university networked computers in the pooled room and library. It can also be purchased for home use. Further details can be found on the library website at: <http://www.brookes.ac.uk/library/endnote/endnoteuse.html>

### Starting EndNote and creating a new library

- Log on to a PC in a pooled computer room or the Library
- Click on Start, bottom left of screen and choose All Programs. Select Library Resources and EndNote X3
- EndNote will open displaying a number of options. Select 'Create a New Library' (click on the folder icon to the left of the text). Name and save your library.

### Opening an EndNote library automatically

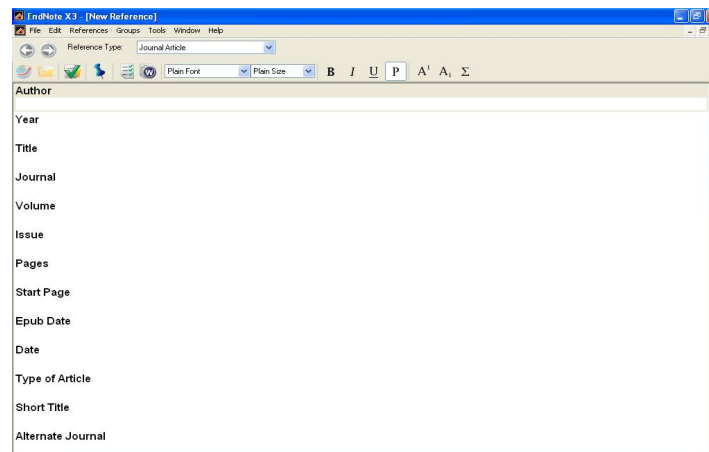
You can specify which library will open automatically when EndNote starts up. We recommend that you only have 1 library.

- Open EndNote X3. Select 'Open an existing library' (click on the icon to the left of the text). Select your library
- Go to Edit and select Preferences
- Select an option from the drop down menu next to 'When EndNote starts'. Click Apply and then OK.

## 2. Adding references into your EndNote library manually

You can add references to your Library manually or automatically. You can type in references, cut and paste or transfer from an electronic resource, eg database. To add a reference manually:

- Click on References and select New Reference. Alternatively select the New Reference icon.



- Select a Reference type from the Reference Type drop down menu. The default is Journal Article
- Enter the details of your reference. Use the Tab or Shift Tab key to move up and down between the different fields
- Click on File and select Save to save your reference. Click the small x symbol (below the red x symbol) to close your reference
- Double click on a reference to edit it. Alternatively highlight the reference and select References and Edit References.

### Entering information into the reference fields:

#### Authors:

- Put a space between first and last names eg Kelly, John OR Kelly, B. K.
- Type one author name on a line. Click Enter to insert more lines
- Organizations must be entered with a comma at the end.

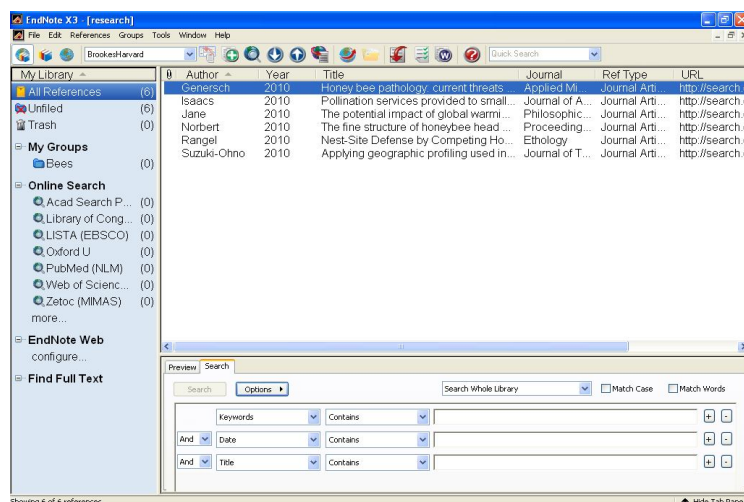
#### Titles:

- Don't use any formatting, with the exception of italics for a species name etc, and no need to use full stops at the end of article or book titles.

**Keywords** can be separated by semi-colons ; or backslashes \

### 3. Layout of your EndNote Library

The Library window includes three panes:



**The Reference List pane** displays a multi-column list of your references. By default, the first column shows a paper clip icon for references that include an attached file. Then, the first author's last name, the year, the title, the journal name or secondary title, the reference type, the URL, and the last updated date.

**The Groups pane** at the left of the window lists various groups of references. See section 5 for further details.

**The Tab pane** displays a Preview tab to view references and a Search tab.

#### 4. Adding references automatically

You can transfer a set of references from an electronic resource, eg a database, instead of entering the references manually. Some databases offer the option of exporting directly into EndNote, in others you need to save records and then import them.

Details of how to do this for a wide range of databases are available on our web pages at: <http://www.brookes.ac.uk/library/endnote/importfiltersendnotex3.html>

It is important to check your imported references. Double click on a reference to view and edit it. Alternatively highlight the reference and select References and Edit References. You can also add any additional information you want to include.

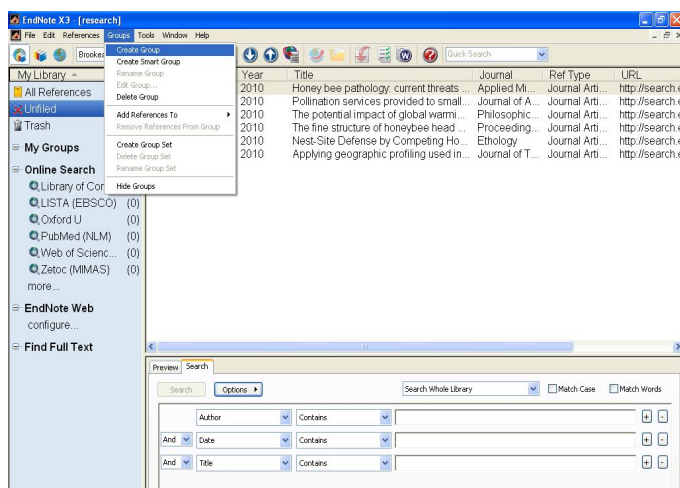
#### 5. Saving your references to groups

You can save your references to a group/s to help organise your library in a meaningful way. The left pane of the library window lists groups of saved references. You can build your own (custom) group/s as well as using the permanent groups. The first three groups are permanent:

- All References displays all of the references in the library
- Unfiled contains the references that are not part of your custom groups
- Trash contains references that have been deleted from the library but not yet permanently discarded.

A custom group is built by specifically adding individual references to the group:

- To create a custom group, click Groups, top of screen, select Create Group

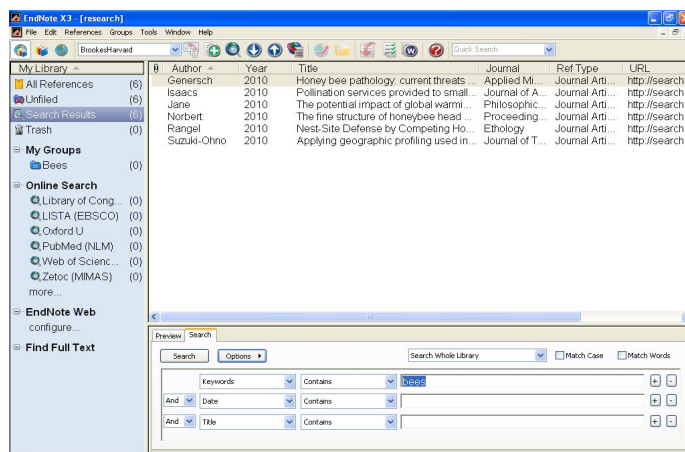


- In the Groups pane of the Library window, a group titled New Group is now highlighted
- Type the group name of your choice and press enter
- To add references to your group, click on the All References group to display all your references. Highlight the references you want to add to the group
- Drag the selected (highlighted) references to the group and drop them on the title of the group. Alternatively, go to the Groups menu and choose Add References To.

## 6. Searching and sorting your library

### To search for references:

- Ensure that the All References group is displayed
- In the Tab pane (lower part of the screen), click the Search tab (next to Preview).
- If a previous search is displayed, select Options and Restore Default.
- You can search by a single search term, eg keyword (default option) or you can add further search criteria by linking the lines with AND (the default option) OR, NOT. Click the drop-down arrow next to AND to change the default
- Click on the drop-down list next to a search term, eg keyword, to change a search field.



- Click the Search button. The references that match your search will now be displayed
- You can also change the criteria of the second column. Contains is the default option. Use the drop-down arrow to change to other options, eg is less then, field begins with.
- Click the + sign to add an additional field if required
- To view your entire library again, click on All References.

### Sorting your References

References can be easily sorted by clicking on a column heading, above your list of references, eg Author, Year, or Title. The default is A-Z author order.

### Previewing your References in a chosen output style

Highlight a reference. Click on Preview (in the Tab pane, lower part of the screen). The details of your reference are displayed in the selected output style. You can change the output style by clicking the drop-down arrow to the right of the output styles box (the default is annotated) above your references list.

## 7. Searching online databases from within EndNote

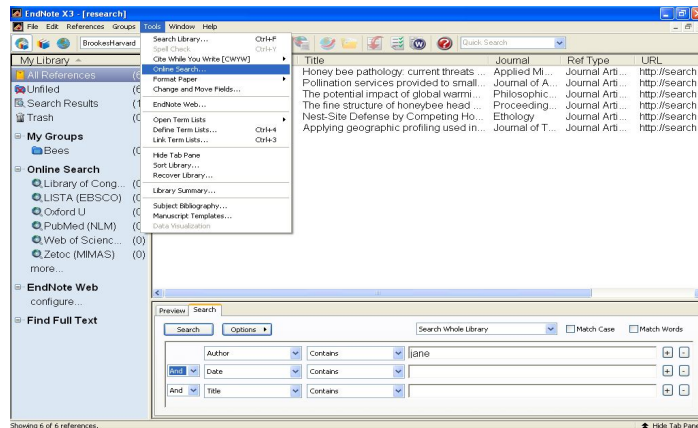
You can connect directly to various online resources (databases and library catalogues) using EndNote X3's Online search feature. Using this feature gives you the opportunity to use a resource through the EndNote search interface and bring the references directly into EndNote.

Although EndNote supplies hundreds of connection links to databases, many of these will not work for Oxford Brookes users either because the Library does not have a subscription to the database or because the connection file is pointing to a server to which we do not have access.

See our website <http://www.brookes.ac.uk/library/endnote/onlinesearchwithendnotex3.html> for details of the links you can use which include The British Library Catalogue and Oxford University Catalogue (OLIS).

## Connecting to an online resource from EndNote:

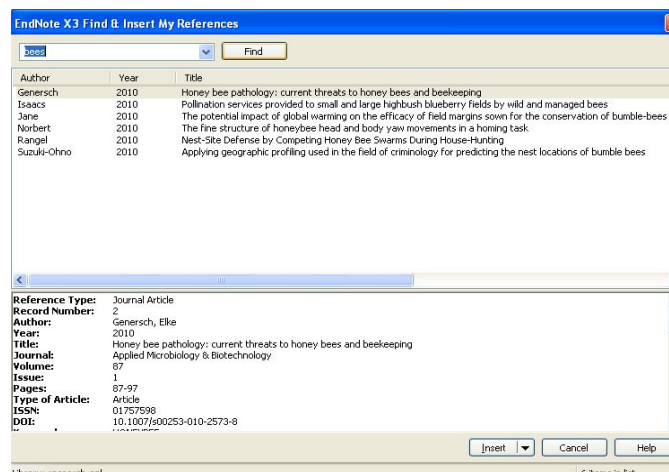
- From the Tools menu in EndNote X3, select Online Search
- Highlight a library catalogue or database from the list. Click Choose.



## 8. Creating a bibliography from your EndNote library

You can create a bibliography directly from your Word manuscript (e.g. essay or dissertation), formatted in whatever bibliographic style you choose.

- Open your Endnote Library.
- Open Word (do not open your document yet). We suggest you disable the Instant formatting option (it formats your in-text citations and bibliography as you go along) as it can be very slow. You need to do this before you open your document:
- In Word 2007, click EndNote X3 and select Preferences. Remove the tick from the box to the left of Enable Instant Formatting and click OK. In Word 2003, select Tools and select EndNote X. Select Cite While You Write Preferences and remove the tick from the box to the left of Enable Instant Formatting. Click OK
- Open your document. When you are ready to cite a reference, position the cursor in the text where you would like the citation to appear. Leave a single space between the text and the cursor.
- Click on Tools (menu top of screen), select EndNote and choose Find Citation. If you are using Word 2007, on the EndNote tab, in the Citations group, click the Insert Citation Icon



- A Find Citation window will appear (it may display a previous search which you can delete)
- In the Find box, enter a search term to find the reference(s) you need
- Click Find. Highlight the reference you want and click Insert. Add further references as needed.

- Formatting your references:  
In Word 2007, select EndNote X3. Select your output style. You can click the drop-down arrow to view a list of available styles (Brookes Harvard and British Standard is listed under the generic category). Select 'Update Citations and Bibliography'. The citation will appear in the text of your document, and in a bibliography at the end.  
In Word 2003, select Tools and EndNote X3. Select Format Bibliography. Choose your output style from the drop-down list of options and click OK.

Many schools at Brookes recommend using a particular style, check with your school which one you should use. There are two commonly used styles, British Standard and Harvard. In the customised pooled room version of EndNote these are available and referred to as BrookesBritishStandard and BrookesHarvard. They are both listed under the category 'generic'.

If you are using EndNote on your own PC you can download these output styles from our web pages at <http://www.brookes.ac.uk/library/endnote/outputstyles.html>

### **Creating a stand-alone (independent) bibliography**

In EndNote, open your library of references. You need to choose which output style you want your bibliography to be in:

- Above your list of references you will see the current output style displayed, e.g. BrookesHarvard. Use the drop-down menu if you want to select another style.
- Select the references you want in your bibliography - you can either do this from your complete references list or use the search facility to create a subset of references.
- To select records which appear consecutively, click on the first reference and hold down the Shift key to highlight a batch of references. To select separate references, click on the first reference and hold down the Ctrl key, then click on each of the desired references.
- You can now copy these selected references into your Word document. Choose Edit (from your Endnote toolbar) and select Copy Formatted.
- Open your Word document put the cursor where you want your bibliography to start and click on Edit, then Paste.

### **9. Finishing your EndNote session**

Select File and Exit, alternatively click the red X, right corner of the screen.

### **10. Further Help**

- EndNote provides detailed online help. Select Help top of screen. You can look at a list of contents or search for words or phrases.
- Visit our Library web pages at <http://www.brookes.ac.uk/library/endnote.html>
- Contact your Subject librarian – details are available from the Subject help pages at: <http://www.brookes.ac.uk/library/subject.html>