

# EndNote™ X9 Introductory Guide

This guide is a comprehensive introduction to using EndNote at Massey University Library.

January 2020



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## What is EndNote?

EndNote is a reference management programme that allows you to create, store and manage your references and citations. Reference information can be added manually, and/or imported from article databases and catalogues. The records stored in your personal EndNote Library can be used to create bibliographies instantly in a variety of bibliographic styles, and citations can be inserted into Word documents. You can also put PDF documents or other files into your EndNote Library.

**Note for Mac Users**  
The instructions should generally be similar, except use the Command (⌘) key in place of Ctrl,

To right-click on a single-button mouse or trackpad use Ctrl-click.

## Creating your EndNote Library, and where to save it.

1. Open the EndNote program from your Programs list.
2. Select **File/New**. This will open a box, you will need to name your new Library and choose where you want to save it.\* (EndNote may default to saving it in your My Documents folder).
3. Your new (empty) Library will appear on your screen.

### Important Note on Saving:

\* Ideally, EndNote libraries should be kept on your computer's hard drive.

\* EndNote libraries should never be stored in cloud-syncing folders such as Dropbox, OneDrive, Box, SugarSync, etc. Cloud-syncing folders corrupt EndNote libraries over time.

**Mac users:** Do not store EndNote libraries in iCloud or any other cloud-syncing folder, and do not store EndNote libraries in the Documents folder if you have selected the option to store documents in iCloud.

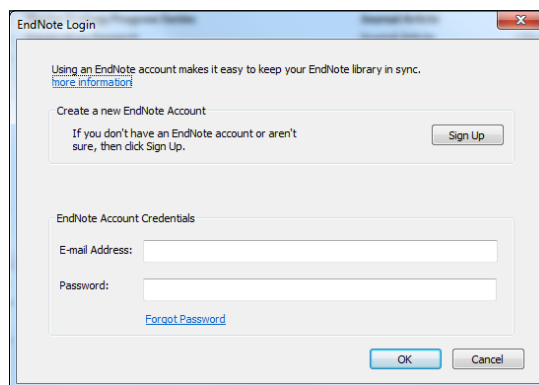
## EndNote Synchronisation



EndNote lets you have an online version of your library as an automatic backup, which also allows you to synchronise and share your library across different computers. You can also access your library on machines without EndNote, or allow shared access to groups/people via your EndNote account:

<https://www.myendnoteweb.com>.

The first time you synchronise your Library it will prompt for your EndNote account login. If this does not happen automatically, force it by clicking **Sync Library** on the menu bar (or if you have not registered, click **Sign Up**) and follow any prompts.



**Note: It is important to only have one EndNote library!**

You can only Sync one Endnote Library. You can organise references into Groups within this library (see pg 10).

## The Library Window

1. The **Groups pane** lists various groups of references for easy retrieval.
2. The **References pane**
3. The **Tab pane** displays a Preview tab to view how your references will cite according to the selected style, a References tab for editing, and a PDF view tab.

1: Groups pane

2: References pane

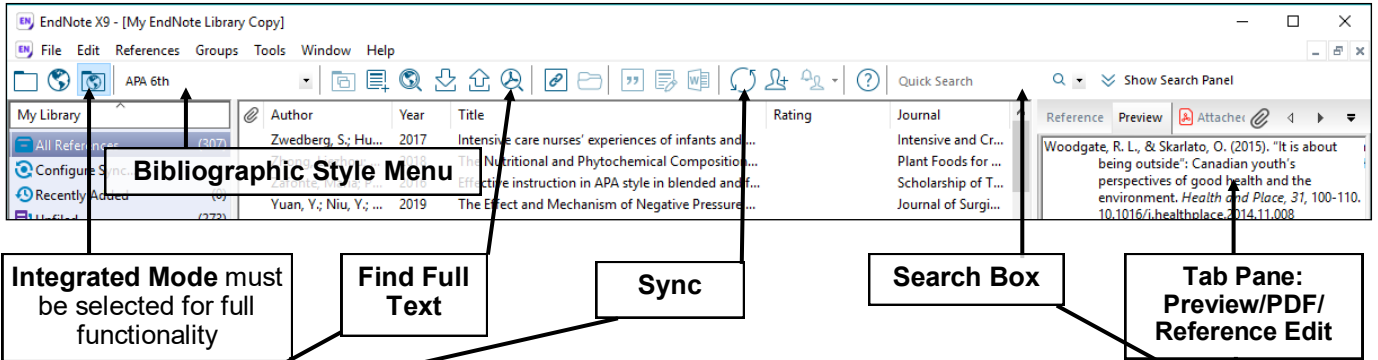
3: Tab pane

**Tip:**  
Click on the **Layout** option to adjust the arrangement for smaller screens

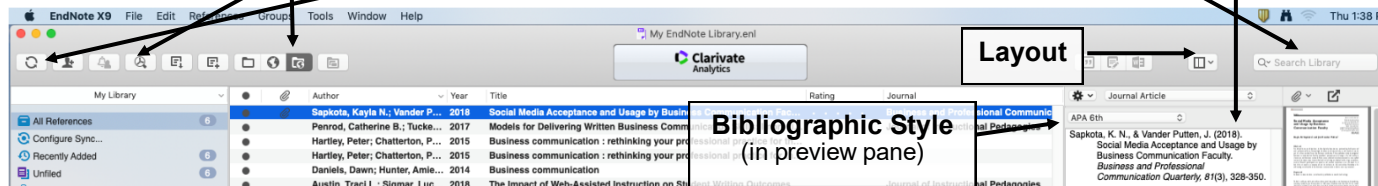
## The EndNote Toolbar

**Tip:** Hover your mouse over the toolbar icons to see what they are.

Windows



Mac



## Entering and Viewing References

### Manual Entry

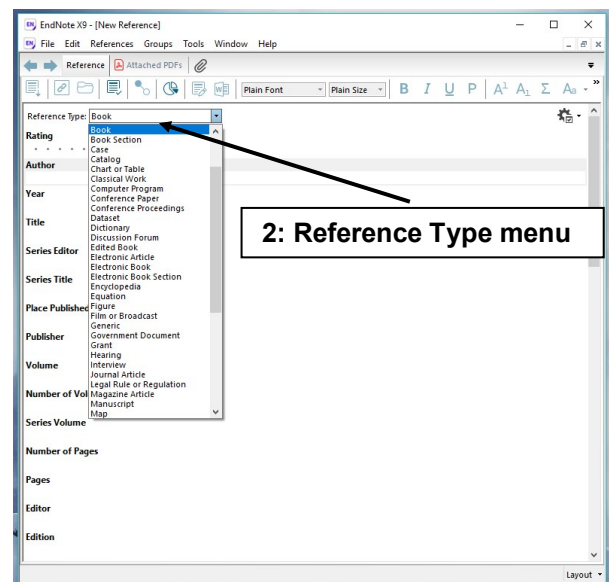
There is no limit to the number of references you can add to a single EndNote Library.

To manually add a new reference:

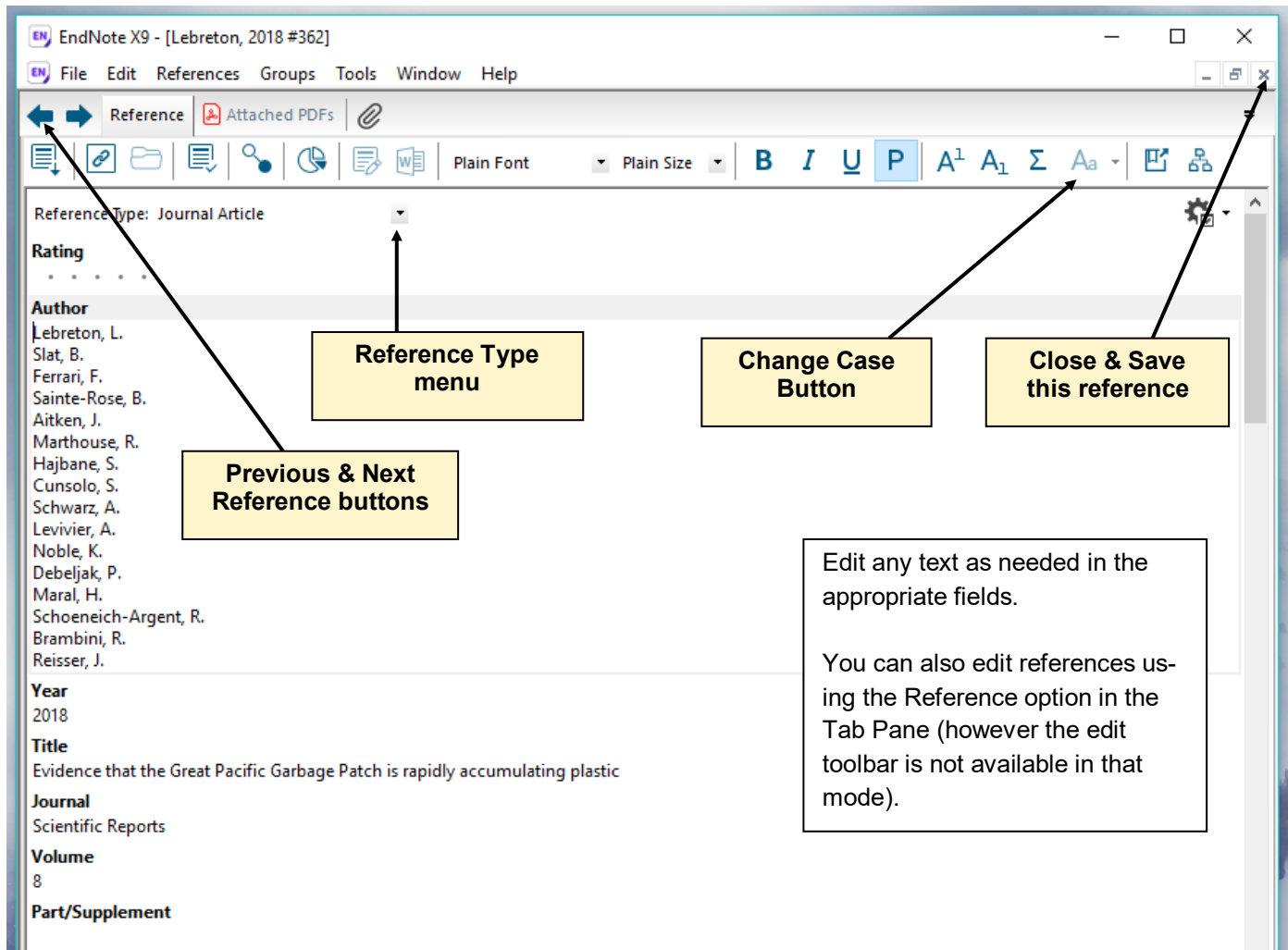
1. Select **References/New Reference (Ctrl-N)**. This will open a new reference template. The default reference type template is 'Journal article'.
2. From the **Reference Type** drop-down box, select an appropriate reference type template. EndNote will configure your bibliography based on the reference type you select here, therefore it is important to select the most appropriate template you can find. Think carefully about what you want to reference before you select the reference type template (e.g. is it a book, an edited book or a book section/chapter?).

**Note:** For *published* conference papers use **Book Section** (or **Journal Article** if with Volume Nos.)

3. Once you have selected the appropriate template you can add the reference information you have. There are no compulsory fields and additional information can be added later.
4. Close the reference window once you have finished, using the close (and save) button (the lower **X** in the top right corner), or using **Ctrl-W**.
5. You can see how the reference will appear in a bibliography by looking at the Tab Pane with the **Preview** tab selected. The reference will be formatted according to the bibliographic style selected in the drop-down box at the top left of the screen (see page 4 for adding relevant bibliographic styles to this drop-down box).



## EndNote Reference Window



### Notes:

- Punctuation**  
 Do not add extra punctuation or text styles to the reference information (e.g. parentheses around the year, bold, italics). EndNote will add punctuation and formatting when it formats a bibliography if it is required by your selected style.
- Authors**  
 Author names can be entered First Middle Last **or** Last, First Middle (e.g. Carol Margaret Jacobs or Jacobs, Carol Margaret).
- Multiple Authors/Editors**  
 Each individual author **must** be entered on a separate line (press **Enter** to get a new line).
- Organisational Authors**  
 Enter with a comma at the end e.g. World Health Organisation,
- Autocomplete**  
 As you enter author names, titles, and keywords EndNote will supply possible words based on previous entries. New entries in these fields will initially appear in red font. You can select the supplied word by pressing **Enter** or **Tab**.
- Titles**  
 Enter these in the correct case for your bibliographic style (e.g.: Sentence case for article or book titles; or Title Case for journal titles. Check a style manual if you are unsure. Use the **Change Case** button options to fix.) You must also enter the punctuation required within the title (e.g. a colon before a subtitle). Enter *italics* or other formatting when required (such as for *Species Names*). Some titles may be imported in capitals which will need changing to fit your citation style.

**Author**  
 Rebecca Jones  
 Hopping, Margaret

**Author**  
 World Health Organisation,


- **Notes and/or Research Notes**

These fields can be used to add your own comments to the reference. They are searchable fields, and will not appear in your bibliography.

- **Record Numbers**

As you enter references into your EndNote Library (either manually or by importing from databases) each record is allocated a **Record Number**.

- This number is allocated in the order in which the records were first added to the Library, and it does not change even if previous record numbers are deleted. If you display the record numbers in your Library you can use these to help identify any problematic references in your Word document.

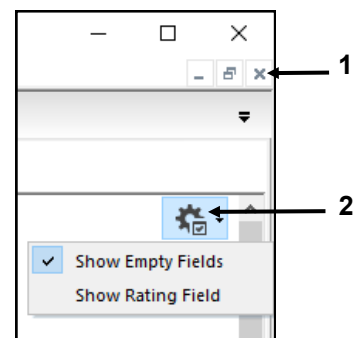


Record Number	Author	Year	Title
59	Yovel, Y.; Franz, ...	2008	Plant classification from bat-like echoloca
60	Wiegrebe, L.	2008	An autocorrelation model of bat sonar
61	Greenhall, Arthu...	1982	House bat management
62		2009	Leaf-nosed bat
63	Jen, P. H. S.; Wu,...	2008	Echo duration selectivity of the bat varies
64	Holland, Richard ...	2008	Bats use magnetite to detect the earth's s

## Working with a Selected Reference

To work with an individual record, select it by double-clicking on it. A Reference Window will appear showing the full record. This is where you edit information associated with a reference. As discussed above, each record is based on a Reference Type template, with a series of fields which contain the information. None of the fields are compulsory, and information can be added over a period of time e.g. you can use the notes field later to annotate the reference.

1. To close and save the Reference click on the lower **X** in the top right corner (or use **Ctrl-W**). Tick the box if you do not wish to be prompted each time you save.
2. You can toggle hiding or showing empty fields using the **Show Empty Fields** tick box in the top right hand corner. This can save scrolling to find information.

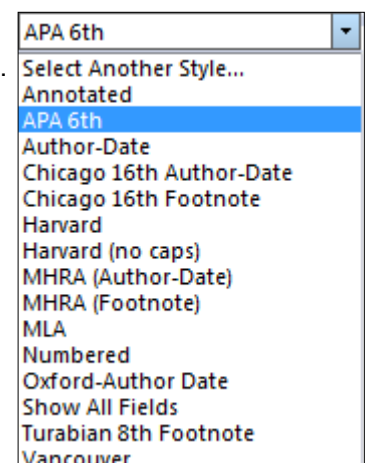


### **Tip: Reference Updating**

You can check for database updates to a reference by highlighting the one you wish to check, then go to **References** on the menu bar, (or right-click), and select **Find Reference Updates...**

## Bibliographic Styles

EndNote comes with around 500 of the most popular bibliographic styles preinstalled. A drop-down box on the toolbar shows which ones you have selected for use. When you click on the **Preview** tab in the tab pane the reference highlighted will be formatted according to the bibliographic style selected in this drop-down box.





To preview and select other bibliographic styles:

1. Click on **Select another style** from the drop-down box.  
The EndNote Styles window will appear.
- **Find by** is used to search by subject.
- Click on the **Style Info/Preview** button to toggle between an explanation and a preview of a style.
2. Pick the style you want, highlight it, and select **Choose**.  
Your references will change to this style and it will feature in the dropdown menu.

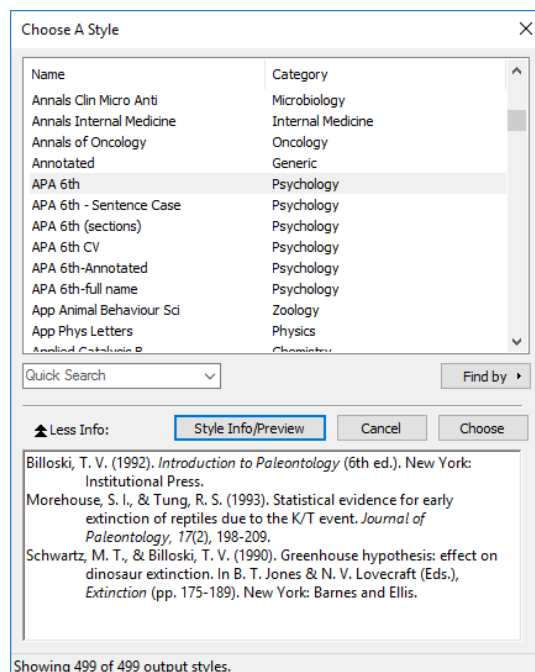
#### Tip: Loading Other Styles

A further 6,000+ are available from the Endnote website:

<http://endnote.com/downloads/styles>.

Once you have downloaded the style you want, to load it:

1. Click on it to open it.
2. Go to the File menu in Endnote and select **Save as**.
3. A box will appear – save it as **StyleName**  
(ie: delete the COPY bit).
4. Quit out of the style.
5. You can now choose **Select Another Style...**  
on the style menu to access it.

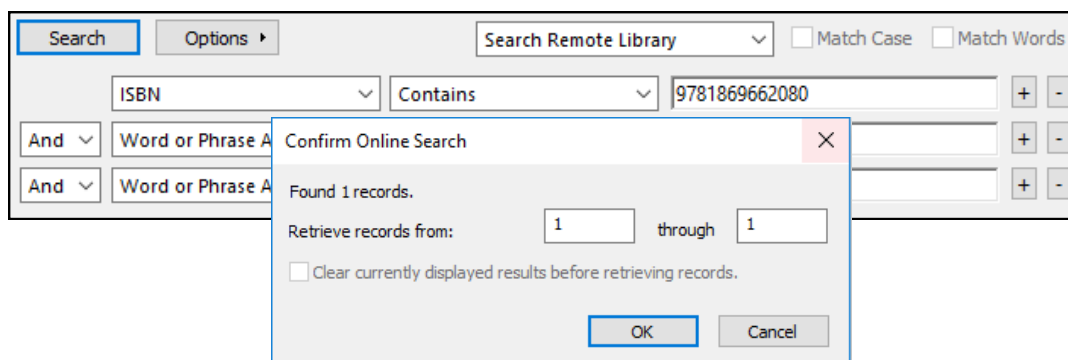
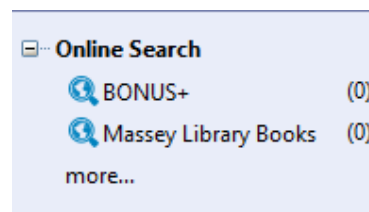


## Getting Book Records via the Library

### Online Search Using EndNote

Online searches import records directly from library catalogues and other sources. The **Online Search** in the Groups pane lists your "favourite" sources for searching. This method of importing can be used for the **Massey Library Books** and **BONUS+** databases.

1. Under Online Search, select a source to search from. If the resource you want to search is not listed, click on **More**. (If it is not on this list, download and run the Massey Profile Installer - available from: [http://www.massey.ac.nz/massey/research/library/help-and-instruction/endnote/endnote\\_home.cfm](http://www.massey.ac.nz/massey/research/library/help-and-instruction/endnote/endnote_home.cfm).)
2. When the connection has been established, the Search tab will appear and you can enter your search (such as an ISBN number, keywords, or title, etc. If needed, use the drop-down menu in the search box).
3. Click on **Search**. A box will appear at the top of the references pane with the number of retrieved records. Click **OK** to retrieve the references to your EndNote library.



#### Search tips:

- You can extract individual records by searching on the ISBN number or other keyword(s) distinctive to that record.
- Truncation is *mostly* accepted on search terms ( usually \* or ?)
- If a search returns multiple records, delete any records you do *not* want in your library by selecting them and click-and-drag them to the trash, or using the **Delete** key

## Saving References from Article Databases into EndNote

Most databases allow you to directly export the results of your searches to your EndNote Library. The method used depends on the database. Instructions for each of the major Massey University databases can be found below. For other instructions contact your Subject Librarian.

When records are imported they will initially appear in an **Imported Reference** group. They will also automatically be added to your EndNote Library as part of the **All References** group. Delete any records you do *not* want in your library by selecting them and pressing the Delete key, or click-and-dragging them to the **Trash**.


### Notes:

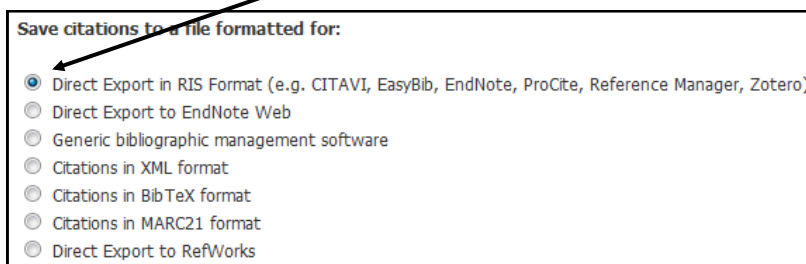
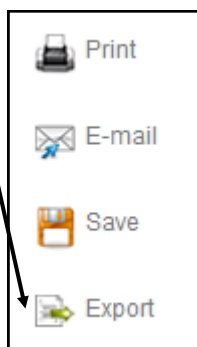
- The quality of the imported results varies between databases. You will need to check the references in EndNote, and you may need to edit them. Look out for: data appearing in incorrect fields; incorrect formatting of the title field (e.g. capitalisation); incorrect reference type template selected, no spaces between author initials, etc.
- **Internet Browser Compatibility**  
Mozilla Firefox performs best, followed by Google Chrome and Internet Explorer or Edge. You may be unable to direct export using Safari or other browsers.
- **Mac Users**  
When following the instructions below the EndNote Library may not open automatically. You may instead be prompted to select an application and/or the relevant Endnote Library.
- **Internet Explorer/Edge Users**  
IE's security may block or save the file download. Click the security bar, or Save, to then open the file. You may also be prompted to select the Endnote Library to put the references into.

### Discover/EBSCOHost Databases

(e.g. *Discover*, *Academic Search Premier*, *Business Source Complete*, *CINAHL*, *EconLit*, *ERIC*, *Historical Abstracts*, *MasterFILE Premier*, *Philosophers Index*, *PsychInfo*, *RILM*, *SPORTDiscus*, etc)

Go to your database, do a search and click the folder+ icon for  the records you want to save.

1. When ready - go to the  **folders** icon on the top right of the Discover page.
2. Select the records you want to export to EndNote (selecting none exports everything).
3. Click the **Export** icon.
4. Mark the radio button **Direct Export in RIS Format**



5. Click **Save**. EndNote should open automatically.  
(A box may appear prompting for the EndNote Library you want to deposit the records into, and/or asking you to Open or Save the file - click **Open**. You may also be prompted with a list of filters to choose from. If so - choose the **RefMan RIS** filter.)

### Note:

The records will need checking. Books may be more cleanly imported using Online Search (see p5)



## Scopus

Go to your database, do a search and select the record(s) you wish to export by ticking the relevant box(es), then:

1. Click on **Export**.
2. Choose **RIS format** (eg: EndNote, Reference Manager)
3. From the boxes select the information you want to export.

Export document settings ⓘ

You have chosen to export 20 documents

Select your method of export

☐ MENDELEY ☐ RefWorks ☐ SciVal ☒ RIS Format (EndNote, Reference Manager) ☐ CSV (Excel) ☐ BibTeX ☐ Text (ASCII in HTML)

What information do you want to export?

Customize export

Citation information	Bibliographical information	Abstract and Keywords	Full Record
<input checked="" type="checkbox"/> Author(s)	<input checked="" type="checkbox"/> Affiliations	<input checked="" type="checkbox"/> Abstract	<input type="checkbox"/> Full Record
<input checked="" type="checkbox"/> Document title	<input checked="" type="checkbox"/> Serial identifiers (e.g. ISSN)	<input checked="" type="checkbox"/> Author Keywords	<input type="checkbox"/> Abstract
<input checked="" type="checkbox"/> Year	<input checked="" type="checkbox"/> PubMed ID	<input checked="" type="checkbox"/> Index Keywords	<input type="checkbox"/> Source title
<input checked="" type="checkbox"/> Source title	<input checked="" type="checkbox"/> Publisher		<input type="checkbox"/> Volume, Issue, Pages
<input checked="" type="checkbox"/> Volume, Issue, Pages	<input checked="" type="checkbox"/> Editor(s)		<input type="checkbox"/> Citation count
<input checked="" type="checkbox"/> Citation count	<input checked="" type="checkbox"/> Language of Original Document		<input type="checkbox"/> Source and Document Type
<input checked="" type="checkbox"/> Source and Document Type	<input checked="" type="checkbox"/> Correspondence Address		<input type="checkbox"/> DOI
<input checked="" type="checkbox"/> DOI	<input checked="" type="checkbox"/> Abbreviated Source Title		

4. Click **Export**.

EndNote should open automatically. A box may appear prompting you to select the EndNote Library you want to deposit the records into, and/or asking you to Open or Save the file - click **Open**.

## Web of Science

(e.g. *Web of Science*, *CAB Abstracts*, *Biological Abstracts*, *MEDLINE*, *FSTA*, *Current Contents Connect*, etc.)

After searching, you can select the reference(s) you wish to export by ticking the relevant box(es).

From the Results screen:

1. Select the records you want to save (or select none if you wish to specify a range)
  2. Scroll to the top or bottom of the results list and select the **Export...** menu and select **Endnote Desktop**.
  3. A box will appear. Select the options you want and click **Export**.
- (Your browser may prompt you to select the EndNote Library you want to deposit the records into, and/or asking you to **Open or Save the file** - click **Open**.)

Export...

- EndNote Desktop
- EndNote Online
- Other File Formats
- Claim on Publons - track citations
- Print
- Email

Export Records to EndNote Desktop

☒ All records on page

☒ Records from: 1 to 100

No more than 500 records at a time.

Record Content:

Author, Title, Source, Abstract

Cancel Export

### Tip: Exporting an Individual Record From a Database

When viewing an individual record in most databases, you can click on the relevant **Export** option to immediately export that record in full record format.

## Google Scholar

Google Scholar records will not contain any abstracts or keywords, as Google Scholar exports only citations.

1. In Google Scholar, click on the Menu on the top left of the Scholar homepage.
2. Choose settings.
3. From the Bibliography Manager section, select **Show links to import citations into**, and pick **EndNote** from the drop-down box. Click on **Save**.

### Bibliography manager

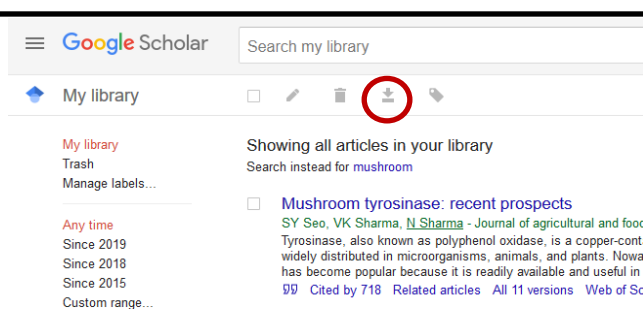
- ☐ Don't show any citation import links.  
☒ Show links to import citations into **EndNote** ▾

4. Do a search in Google Scholar. Click on the **Import into EndNote** under the result you want to add to EndNote. EndNote should open automatically. (If a box appears prompting you to select the EndNote Library you want to deposit the records into, and/or asking you to Open or Save the file - click **Open**. The records will need checking and editing).

**Free radical scavenging activities of mushroom polysaccharide extracts**  
F Liu, VEC Ooi, ST Chang - Life sciences, 1997 - Elsevier  
The superoxide and hydroxyl radical scavenging activities of eight mushroom antitumor polysaccharide extracts were investigated using phenazin methosulphate-NADH-nitroblue tetrazolium system and ascorbic acid-Cu 2+-cytochrome C system respectively. The results ...  
☆ Cited by 1176 Related articles All 7 versions Web of Science: 616 Import into EndNote

### TIP: Use 'My Library' in Google Scholar.

Sign in to Google to export more than one reference. Save references to 'My Library' by clicking the star icon under the search result (see image above). Access the saved references by clicking "My Library" located at the top right of the screen. Select all or some of the references and export.

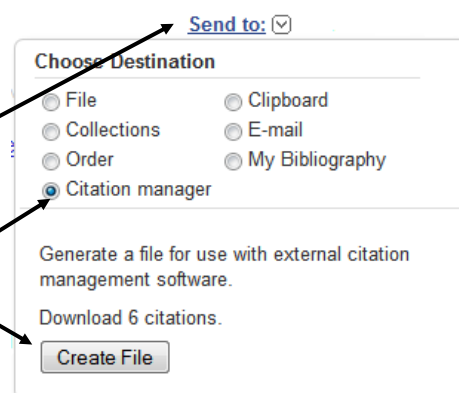


## PubMed

(i.e. MEDLINE - public version)

Go to PubMed and do a search.


1. On the results page, tick the records you want to export.
2. Click on **Send To** at the top of the results list.
3. Select **Citation Manager** from the menu.
4. Click on **Create File** to send to EndNote.

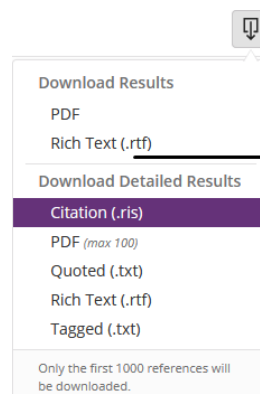


## SciFinder-N

(i.e.: Chemical Abstracts, MEDLINE)

When you have a list of references in SciFinder-N

1. Select the items you want by clicking the boxes. (Tip: Selecting nothing will download up to the first 1000 results.)
2. Click on the download icon  on the top right, and select **Citations (.ris)**



### Tip: Abbreviated Journal Titles (PubMed, SciFinder-N)

These databases may bring in abbreviated journal titles instead of full. A fix for journal title abbreviations is at:

[https://support.clarivate.com/Endnote/s/article/EndNote-Generate-full-or-abbreviated-journal-names?language=en\\_US](https://support.clarivate.com/Endnote/s/article/EndNote-Generate-full-or-abbreviated-journal-names?language=en_US).

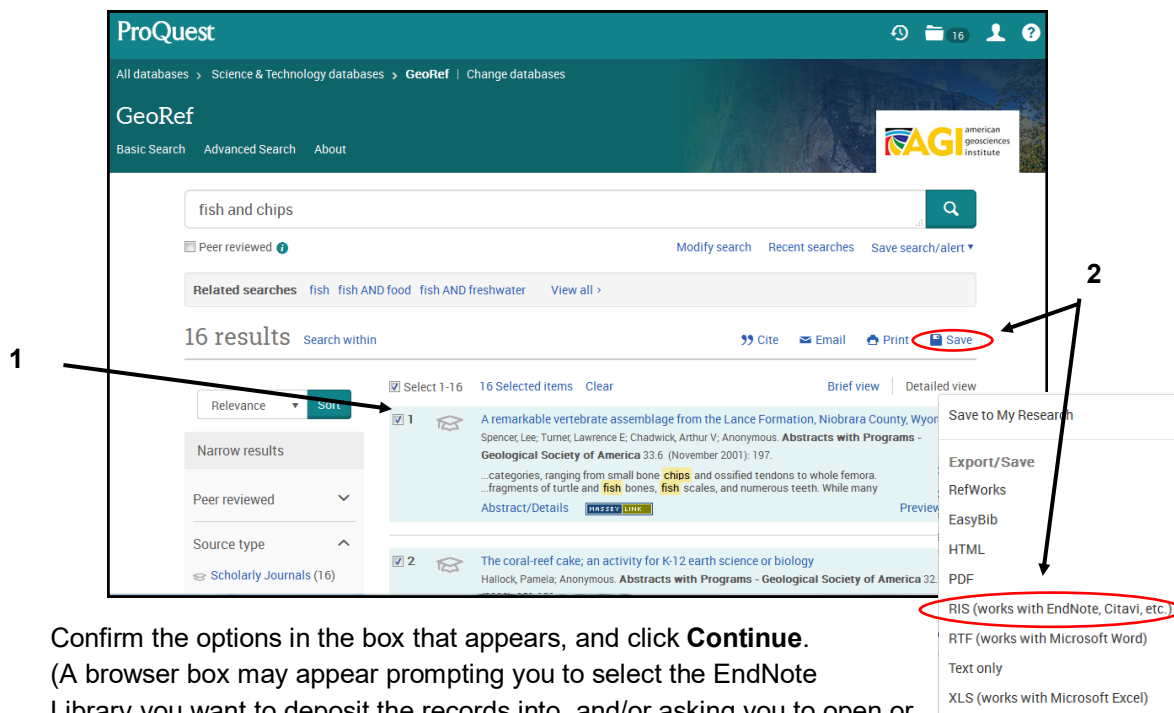
Or you can search for these references on other platforms (eg: Scopus, Web of Science).

## ProQuest Databases

(e.g. *ARTbibliographies Modern*, *Design & Applied Arts Index*, *GeoRef*, *Linguistics & Language Behavior Abstracts*, *Proquest Dissertations*, *Social Services Abstracts*, *Sociological Abstracts*, etc)

Go to your database and do a search.

1. Tick the records you want to save.
2. Click **Save** and choose **RIS (works with EndNote, Civiati, etc)**



3. Confirm the options in the box that appears, and click **Continue**.  
(A browser box may appear prompting you to select the EndNote Library you want to deposit the records into, and/or asking you to open or Save the file - click **Open**.)

## Import Filters

Sometimes EndNote prompts you to select an import filter to allow it to import the references into your EndNote Library. EndNote comes with some of these filters already installed, allowing you to import references from most databases.

To view all the installed import filters, open EndNote and:

1. Select **Edit/Import Filters/Open Filter Manager**.
2. Once you have finished marking the filters you are likely to use, close the screen with the lower X in the top right corner.

Your selections will be automatically saved.

### **Note:**

Some databases have multiple providers, so it is important to select the provider that Massey University Library uses. For help, contact your Subject Librarian.

In some cases the exact filter for your database may not be installed by default into EndNote.

- Most databases have filters available, and new filters are constantly under development for those databases that will support them. A range of the latest filters can be downloaded from the EndNote website: <http://endnote.com/downloads/filters>

To add a new filter to your Endnote programme:

1. Download your desired filter
2. Double-click on the file to open it.
3. Go to the **File** menu and select **Save as**.
4. A box will appear – save it as **Filter Name** (ie: delete the COPY bit).
5. Quit out of the filter.
6. In Endnote, go to menu and select **File/Import/File**. You can now change the Import option to **Other Filters...** to access your filter.

If you need any help with filters please contact your Subject Librarian (see page 16).

## Managing Your Library

### Backing Up Your Library

**Automatically:** Syncing your Library (see page 1) automatically updates a copy of your Library using your EndNote account. However you can still do occasional backups of your Library as a precaution.

**Manually:** EndNote allows you to save your complete Library to a single compressed file (.enlx). The compressed file includes the Library (.enl file) along with its accompanying data folder (.data). Saving this way minimises the danger of losing your PDF links and other problems. To save a compressed Library file, open the Library:

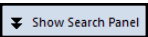
1. Go to **File/Compressed Library**.
2. Select what you want to save (the default saves the whole library) and click **Next**.
3. Choose where you want to save it to.

Clicking on the .enlx file will make EndNote open and recreate the .enl library file and .data folder.

### Searching Your Library

It is possible to search All References in your EndNote Library by using the **Quick Search** box in the menu bar - just enter a keyword(s) and press Enter.

For a more sophisticated, or group-specific search:

1. Select the Group you wish to search
2. Click on **Show Search Panel**  **el** in the menu bar, enter the search criteria and select from the drop-down boxes the fields you want to search.

### Groups (see Groups pane)

The **Hide/Show Groups** command can be found under Groups on the Menu Bar.

#### **Permanent (Automated) Groups**

- **All References**  
Click to view all of the references in the current Library.
- **Trash**  
To move references to the Trash select highlight them and press the Delete key. You will be prompted to empty the trash whenever you close the Library.

## Temporary (Automated) Groups

- **Duplicate References**

Displays the results of duplicate detection in an EndNote library. These can be searched for using **References/Find duplicates** for any group. EndNote will prompt for you to select which record to **Keep**, or click **Cancel** if you want the default selection (latest record added). These will be highlighted so you can click the Delete key to remove.

- **Find Full Text**

Displays the last group of references for which EndNote inserted either the full text file or a URL - or has not found. When you close the library, this group is deleted.

- **Imported References**

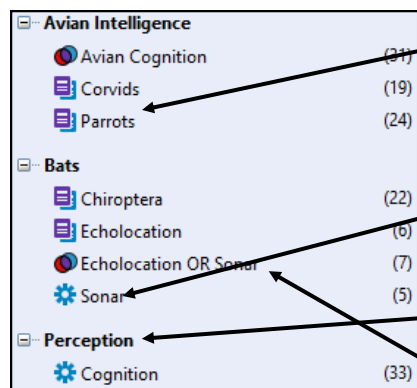
Displays the last group of references imported into the library. When you close the library, the group is deleted.

- **Search Results**

Displays the most recent search results. When you close the library, the group is deleted.

## User Created Groups

Up to 5000 Groups or Group Sets can be created. These appear in the left-hand Groups pane. For group functions, use the **Groups** menu on the toolbar, or right-click on the Groups Pane.



1. **Custom Groups** are updated only when you add or remove references by dragging them into the group. Custom Groups can be renamed and references in a group remain in the All References Group.

2. **Smart Groups** use keyword(s) to match references in your library. As more references are added to your library the Smart Groups automatically update.

3. Individual groups can be placed into **Group Sets** for easier management.

4. **From Groups** combine results from other groups

## Add PDFs to your EndNote Library

EndNote is capable of storing PDFs and other files. When linked to the relevant EndNote reference they are placed in the Library's accompanying data folder and automatically synced to your EndNote online account. There are 3 ways to get PDFs into your Library:

### 1) Automatic Find Full Text for an Existing Reference

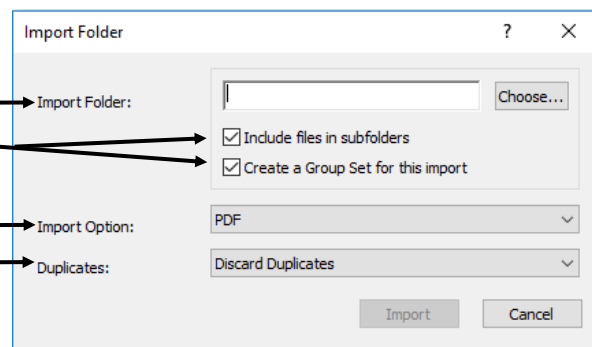
Highlight one or more references and click the **Find Full Text** icon on the menu bar. (Off campus and wireless users will be prompted to enter their Massey login.) If EndNote is able to find the full text, it will download and attach it to the reference(s) as a file attachment.

### 2) Manually Attaching PDFs (or Other Files) to an Existing Reference

To manually attach a PDF to an *existing* reference - resize your EndNote window so that you can see the file required (e.g. on your desktop) and then 'drag and drop' the PDF onto the reference in your EndNote library.

### 3) Import PDFs Where There is no Existing Reference

1. Go to **File/Import**. Select **Folder** for multiple PDFs.
2. **Choose** the file or folder to import.
3. For folder, tick the desired options. (The Group Set option creates a group (pdfs) that you can rename.)
4. Make sure the **Import Option** is set to PDF.
5. For the **Duplicates** option—select **Discard Duplicates** to ignore records already in your Library.
6. Click **Import**.





EndNote will create a reference for the PDF where it can extract information from it. For the rest it creates a record with the filename as the title.

#### Tip: When Find Full Text can't find the PDF

Full text will be retrieved for only a portion of the articles which you can access electronically. You can check the remaining articles by highlighting a reference and right-clicking and selecting **URL/OpenURL Link**. This activates the MasseyLink panel in your browser to further check for a link, and also offers a link to ask the library to find it for you.

#### To View the Full Text:

Select a reference with an attachment symbol  and click the PDF tab in the Tab pane to view the file in EndNote's pdf previewer. To open your pdf in an external pdf reader, click the **Open PDF**  icon on the toolbar.

#### Removing a PDF (or Other File) From an EndNote Reference

This process cannot be undone, so ensure you have a backup of the original file if you want to keep it.

1. Open the relevant reference in your EndNote Library.
2. Scroll down to the **File Attachments** field.
3. Highlight the file icon(s) you want to remove and press your **Delete** key. The document will now have been removed from the accompanying .data folder and synced library.

### Display Defaults

The default display of the EndNote Library can be altered. To select which fields you want to display:

1. Select **Edit/Preferences** (or Endnote:Preferences on a Mac).
2. Click on **Display Fields** from the list on the left.
3. Use the drop-down boxes to select the **Field** and **Heading** you want to display in each column.
4. Click on **Apply**.

Clicking on a Display Field heading sorts the records by that field

#### Notes:

- You will need the **Journal/Secondary title** selected to see the titles of journals displayed
- It is useful to display the **Record Number** field and the **File Attachments** field.
- To re-sort the columns click on the relevant **column heading** that you want to sort by e.g. clicking on **Year** will sort the Library by ascending year, clicking again for descending year.



## Cite While You Write (Microsoft Word 2016/2013/2010/2007)

(If you have Word 2011, you can upgrade to 2106 for free via your Massey Office 365 account)

### Tip: Setting Field Shading in Word

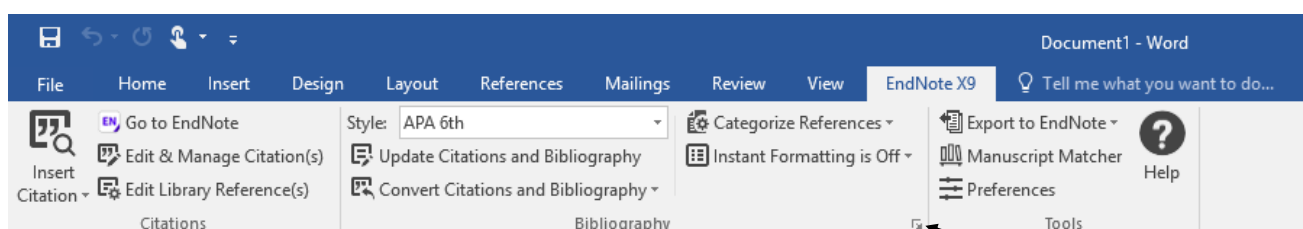
It is important to set the field shading in Microsoft Word to highlight your EndNote citations to minimise accidental deletion. The highlighting will not print.

1. **Word 2016/2013/2010:** Click on the **File** tab in the top left corner of your Word window and select **Options**.  
**Word 2007:** click on the round multicoloured Microsoft Office icon in the top left corner of your Word window and select **Word Options**.
2. Click on **Advanced**.
3. Go about half way down the page, and set the **Field Shading** drop-down box to **Always**.
4. Click **OK**.



Options.

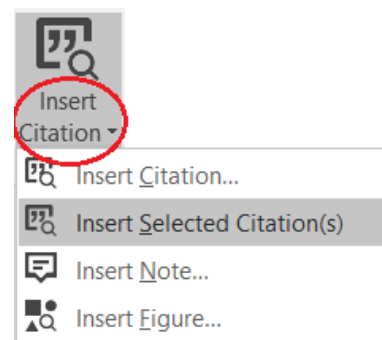
## The EndNote Tab in Word




Configure Bibliography

## Inserting EndNote Citations into a Word Document

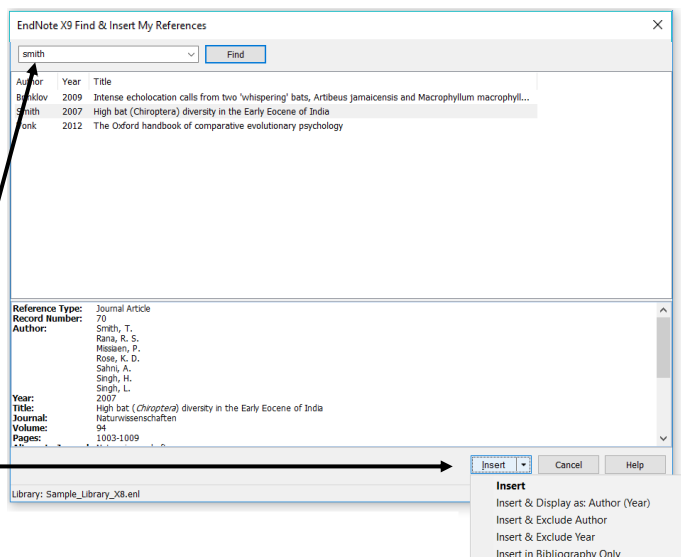
1. Open your EndNote Library, and the Microsoft Word document you want to cite in.
2. Place your cursor in the Word document where you want the citation to appear.
3. Switch to your EndNote Library, and locate and highlight the relevant reference(s) you want to cite. (For multiple references —hold down the Ctrl key when you click them.)
4. Click **Insert Citation** on the Endnote toolbar, or switch to Word, go to the EndNote tab and click on the bottom half of the **Insert Citation** button and choose **Insert Selected Citation(s)**.



### Tip: Inserting Searched References

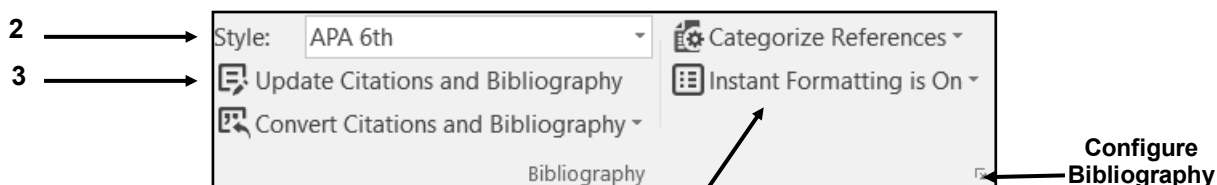
If you have a larger library, you can use the **Search** facility to find your reference(s). In Word, go to the EndNote tab and click on  in the upper half of the **Insert Citation** icon/button.

This opens the search box where you can enter the author or other term(s) to find your reference(s). Highlight the one(s) you wish to insert and click the **Insert** button.



## Formatting/Updating Citations and Bibliographies

By default, EndNote is set to allow instant formatting - which means your newly inserted citation will be formatted immediately according to the selected citation style and it will be added to your reference list/bibliography at the end of your Word document. Sometimes in **long documents** this can be a slow process. To turn On or Off:



1. In Word, click on the **EndNote tab**.
2. Click **Instant formatting Is On** to toggle it **On** and **Off**.

If you do not have instant formatting enabled you will need to manually update your bibliography in order to appropriately format your citations and generate a bibliography.

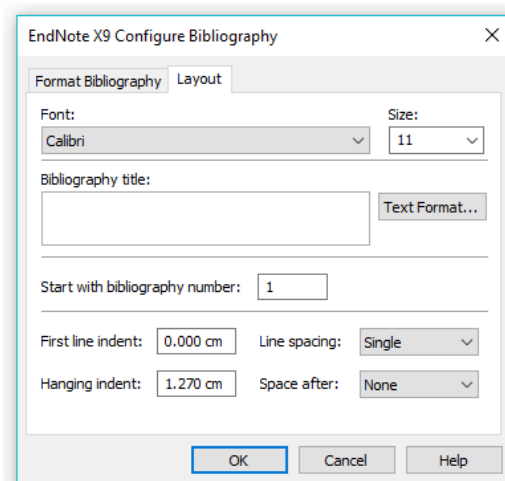
1. In Word, click on the **EndNote tab**.
2. Select the appropriate bibliographic style from the drop-down box Style. If the style you want does not appear in this list, select **Choose Another Style...** If the style is still not listed, you will need load it manually (see the Tip box on page 5).
3. Click on **Update Citations and Bibliography**.

### **Tip: Copying References Directly to Word Without Using Cite While You Write**

1. Select the style you wish the references to be in.
2. In EndNote, select the reference(s) you wish to copy (hold the ctrl key while clicking).
3. Right-click: **Copy Formatted** and paste the reference(s) into Word.

## Changing the Formatting of Your Bibliography

1. Click the **Configure Bibliography** box (bottom right of the 'Bibliography' section - see above)
2. Select the relevant tab and make changes as appropriate:  
**Format bibliography** – this allows you to change the document being formatted and bibliographic style selected.  
**Layout** – lets you give your bibliography a title; change the font, line spacing etc.  
Click **OK** when finished.



## Editing Citations

You can edit your in-text citations, once your bibliography is formatted, e.g. to insert page numbers for direct quotations, exclude the author or year from the display, add prefix or suffix comments.

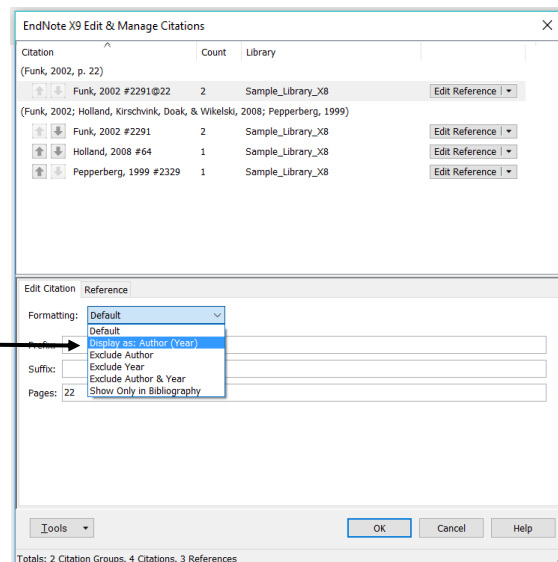
### **To edit a citation:**

1. In Word, place your cursor on the citation you want to edit.
2. Right-click: **Edit Citation/More...**, or go to the EndNote tab in Word and click on **Edit & Manage Citation(s)**.

- Highlight the citation to modify it. Enter page numbers, prefixes or suffixes as needed in the boxes. (Click on the **Help** button for explanations.)
- Click on **OK**. The changes will now show in the citation in your Word document.

**Tip:**

From the Format box you can select **Author (Year)** format or other options as desired. Alternatively, right click on a citation and select **Edit Citation(s)**.



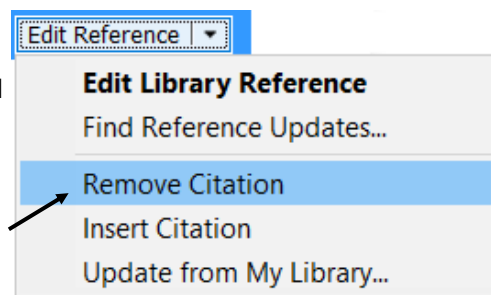
## Removing and Moving Citations

Do **NOT** delete references from your Word document by highlighting and cutting or using the delete button on the keyboard, particularly if there are multiple in-text citations in the same parentheses – e.g. (Smith, 2000; Jones, 2001; Mathers, 2005). In some instances the reference will reappear when the bibliography is next formatted, in other cases it can cause corruptions to occur in the document.

The correct way to remove or move an in-text citation is to remove it using the **Edit Citation** tools.

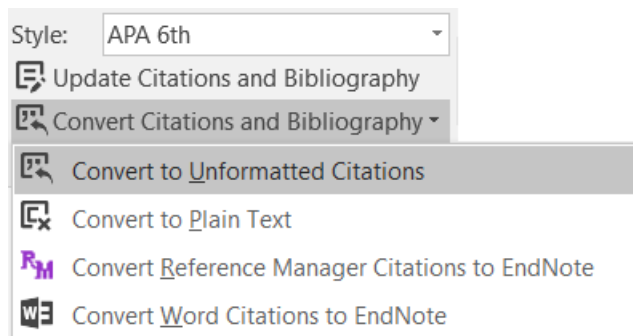
### To Delete or Move Individual Citations

- In Word, place your cursor on the citation you want to remove/move.
- Right-click: **Edit Citation/More...**, or go to the EndNote tab in Word and click **Edit & Manage Citation(s)**.
- In the left hand column ensure the reference(s) you want to delete is selected.
- Click on the **Edit Reference** dropdown and select **Remove Citation**.
- When you have removed all the references you want to delete, click **OK**.



### To Delete or Move a Block of Text With Multiple Citations

- Highlight the text you wish to delete or move (or select nothing to do the whole document).
- Unformat the citations by clicking on **Convert Citations and Bibliography** and select **Convert to Unformatted Citations**.
- Delete or move the entire block of text (including the citations) using Word.
- Click **Update Citations and Bibliography** to reformat your bibliography.



**Note:**

When you unformat in a document it may turn off the Instant Formatting. Hence your next citation may insert with brackets {...}. If this happens, turn the **Instant Formatting** back on (see the top of p15).


## **Referencing Styles**

EndNote is designed to assist you with storing and formatting your references; however you should still be familiar with the bibliographic style you are using. If you are uncertain how a citation should appear in your bibliography you should check an appropriate bibliographic style manual. Copies of most manuals are available in the Library, and some information can be found online. Check Massey Library Discover.

- **Massey University Online Writing and Learning Link (OWLL): Referencing**  
<http://owl.massey.ac.nz/main/referencing.php>

## **EndNote Help**



EndNote comes with a help facility which can be searched or browsed. You can find this inside the EndNote programme – select  **Help** on the toolbar or on the EndNote menu.

### **EndNote Support Page**

EndNote provides a range of online resources for Windows and Mac including links to tutorials, handout downloads and user manuals.

[http://clarivate.libguides.com/endnote\\_training/users/enx9](http://clarivate.libguides.com/endnote_training/users/enx9)

### **Other EndNote Sites**

The EndNote website also offers FAQs and general software support.

- <http://www.endnote.com>
- <http://www.endnote.com/support/faqs/>
- **EndNote Online help:** [http://www.myendnoteweb.com/help/en\\_us/ENW/help.htm](http://www.myendnoteweb.com/help/en_us/ENW/help.htm)

## **Massey University Library Support**

Visit Massey Library's Endnote webpage (Google: Massey Endnote)

[http://www.massey.ac.nz/massey/research/library/help-and-instruction/endnote/endnote\\_home.cfm](http://www.massey.ac.nz/massey/research/library/help-and-instruction/endnote/endnote_home.cfm)

- Massey EndNote Profile Installer— Download and run the installer after any EndNote software updates to keep up-to-date and minimise errors.
- QuickStart Video tutorial
- In-depth introduction to EndNote PDF
- Register for an Endnote class (face-to-face or online)
- FAQs
- EndNote@Massey Blog

Contact a librarian:

Phone 0800 MASSEY (0800 627 739) and ask for the Library

Email [library@massey.ac.nz](mailto:library@massey.ac.nz)