Referencing: EndNote Up & Running
How to Use This Course Book

This handbook accompanies the taught session for the course. Each section contains a brief overview of a topic for your reference and then some exercises.

The Exercises

Exercises are arranged as follows:

- A title and brief overview of the tasks to be carried out
- A numbered set of tasks, together with a brief description of each
- A numbered set of detailed steps that will achieve each task

Some exercises, particularly those within the same section, assume that you have completed earlier exercises. Your lecturer will direct you to the location of files that are needed for the exercises. If you have any problems with the text or the exercises, please ask the lecturer or one of the demonstrators for help.

This book includes plenty of exercise activities – more than can usually be completed during the hands-on sessions of the course. You should select some to try during the course, while the teacher and demonstrator(s) are around to guide you. Later, you may attend Course Clinics, where you can continue work on the exercises, with some support from IT teachers. Other exercises are for you to try on your own, as a reminder or an extension of the work done during the course.

Writing Conventions

A number of conventions are used to help you to be clear about what you need to do in each step of a task.

- In general, the word press indicates you need to press a key on the keyboard. Click, choose or select refer to using the mouse and clicking on items on the screen (unless you have your own favourite way of operating screen features).
- Names of keys on the keyboard, for example the Enter (or Return) key, are shown like this ENTER.
- Multiple key names linked by a + (for example, CTRL+Z) indicate that the first key should be held down while the remaining keys are pressed; all keys can then be released together.
- CMD means hold down the Command key while pressing other key/s; this key may be provided on a Mac keyboard (often marked with an apple or a command symbol ☹).
- Words and commands typed in by the user are shown like this.
- Labels and titles on the screen are shown like this.
- Drop-down menu options are indicated by the name of the options separated by a vertical bar, for example File|Print. In this example you need to select the option Print from the File menu. To do this, click with the mouse button on the File menu name; move the cursor to Print; when Print is highlighted, click the mouse button again.
- A button to be clicked will look like this.
- The names of software packages are identified like this, and the names of files to be used like this.
Software Used

*EndNote X7*

*Word 2013 (Windows) or Word 2011 (Mac)*

*Windows or MacOS*

Files Used

*Advances in Paleontology.docx*

*Further Advances in Paleontology with Citations.docx*

*FieldWork Study.data*

*FieldWork Study.enl*

*Paleo2.data*

*Paleo2.enl*

Revision Information

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1 Introduction

This booklet accompanies the course delivered by Oxford University's IT Learning Centre. Although the exercises are clearly explained so that you can work through them yourselves, you will find that it will help if you also attend the taught session where you can get advice from the lecturers, demonstrators and even each other!

If at any time you are not clear about any aspect of the course, please make sure you ask your lecturer or demonstrator for some help. If you are away from the class, you can get help by email from your lecturer or from help@it.ox.ac.uk

1.1. What You Should Already Know

This session is one of a series that cover the important aspects of using EndNote to build a library of references and cite them in your own documents.

No previous knowledge of EndNote is expected. We will assume that you have some knowledge of Word which may be gained via the Word videos in Lynda.com and that you are familiar with entering text and simple editing, rearranging and formatting text - copy and paste, printing and previewing and managing files.

The computer network in our teaching rooms may differ slightly from that which you are used to in your College or Department; if you are confused by the differences, ask for help from the lecturer or demonstrators.

1.2. What You Will Learn

This course will help you learn to use EndNote to create a library of references and insert citations in a Word document. It is a single session, covering time-saving techniques and automations, and provides tasks for hands-on practice.

In this session we will cover the following topics:

- Creating and using a library of references
- Searching and sorting in a library
- Connecting to online resources
- Downloading (importing) references
- Organising references into groups
- Citing references in a Word document
- Formatting citations and bibliography
- Using a variety of output styles

In these notes, topics marked Optional are additional material which may not necessarily be covered by your lecturer in the taught course. Depending on the work you need to use EndNote for, you may find some of these extra topics helpful. For further information on these, consult EndNote's Help.

Related EndNote courses, should you be interested, are given in Part 13.2 below.

Getting to grips with a package as sophisticated and powerful as EndNote can be time-consuming, so allow yourself plenty of time for practice. To increase your
Referencing: Up & running with EndNote

understanding of *EndNote*, make use of the Help facilities available within *EndNote*.

### 1.3. Versions of *EndNote*

These notes deal with *EndNote X7*. Having worked through these notes, you should also be able to adapt to earlier versions (for example, *EndNote X6*), and also to later releases, since most of the basic principles hold true regardless of the version of the software.

*EndNote* for Mac is very similar to *EndNote* for Windows. Where the actions to follow are very similar in the two versions, we give screenshots or steps using *EndNote* for Windows. Where there are significant differences, we explain both versions.

### 1.4. Using *Word (Office)* 2013 for Windows

In this course book, we give screenshots using *Word 2013*, but the commands and steps are very similar for *Word 2011* for Mac.

If you have previously used another version of *Office*, you may find *Office 2013* looks rather unfamiliar. “Office 2010: What’s New” is a self-study guide covering the ribbon, Quick Access Toolbar and so on. This can be downloaded from the ITLC Portfolio at [http://portfolio.it.ox.ac.uk](http://portfolio.it.ox.ac.uk)

### 1.5. Using *Word (Office)* 2011 for Mac

If you have previously used another version of *Office* for Mac, you may find *Office 2011* looks rather unfamiliar. However, most of the *Word* commands you will need for this course will be found on the *File* menu, and you should be able to adapt your other experience to this version of *Word*.

### 1.6. Keyboard Methods for Using *Word*

For anyone who prefers not to use a mouse to control software, or who finds a keyboard method more convenient, it is possible to control *Office 2013* applications without using a mouse. Pressing ALT once displays a black box with a letter or character next to each visible item on the ribbon and title bar (shown in Figure 1).

![Figure 1 Keystrokes for Controlling Ribbon Tabs and Title Bar](image-url) (Press ALT to show these)
After you have typed one of the letters/characters shown, the relevant ribbon tab or detail appears, with further letters/characters for operating the buttons and controls (shown in Figure 2).

![Figure 2](image)

*Figure 2* Further Keystrokes for Controlling Buttons  
(press ALT+P to show these on the Page Layout tab of the Ribbon)

The elements of a dialog can be controlled, as usual with *Windows* applications, by using TAB to navigate between items or typing the underlined character shown beside an item.

### 1.7. Where Can I Get a Copy?

If you have a copy of *EndNote*, then you should find it among the *All Programs* on a *Windows* computer, or among the *Applications* if you are using a Mac. If you are unable to find it on your computer, it may not have been installed and you should talk to your IT support contact (or the IT Services Help Centre).

If you are a member of Oxford University, you can purchase a copy of *EndNote* from the IT Services Online Shop. Read about obtaining the *EndNote* software in the ITLC Portfolio [http://portfolio.it.ox.ac.uk](http://portfolio.it.ox.ac.uk).

### 1.8. Some Vocabulary

An *EndNote library* is a file containing your collection of references to written work: details of papers, books, conference proceedings and quantities of other research materials. Most researchers keep just one library, and manage many thousand references within it by using suitable groups, keywords etc (discussed later).

A *library* is analogous to a box or set of small drawers where traditionally a set of reference cards would have been stored.

A *reference* is the set of details about one paper, book, conference paper etc. It is analogous to one single card in a card index. With *EndNote* you can record far more information than a traditional card could hold, and more variety of data types than could reasonably be written by hand.

Each item of data in a reference may be called a *field* (as in database work). Suitable fields are offered for each of the many *reference types* available, such as Journal Title for a paper or Series Director for a film.

Once your library is established, you will want to mention these items in your own original written work. When you cite a reference in your own written work, e.g. in your thesis, this is a *citation*. A citation within a paragraph of text (or in a footnote) is commonly given in abbreviated form or as just an index number. *EndNote* retrieves the details directly from the references in your library. In some areas of study it is usual to place citations in footnotes.
EndNote automatically builds a bibliography at the end of your Word document: this is a list of the works cited, with fuller details.

At the word-processing stage, you can control the way the citations and bibliography look by choosing an output style.
2 Creating A Library Of References

2.1. Starting *EndNote*

There are a number of ways that you can start *EndNote*. These include:

- Double-click on an *EndNote* icon or an *EndNote* library icon if there is one on your desktop
- Select a *.enl* file from *My Documents* or a similar folder
- (Windows) Select **Start|All Programs** and select **EndNote**
- (Mac) Use the **Finder** to find an *EndNote* icon among the **Applications**
- (Mac) Click an *EndNote* icon on your Dock

The exact method of starting will depend upon the system setup of your computer.

2.2. Creating a Library

The first step is to start creating a new library. The **New** command is on the **File** menu. You must immediately choose a filename for this file, and a location where it is to be stored.

![Figure 4 Creating A New EndNote Library (Windows)](image-url)
The filename should be something distinctive if you are likely to share computer resources with others. Research is a filename which might apply to almost anyone’s work, whereas JSmith Geology is more specific.

If you are likely to do most of your work on one computer, it is convenient to save the library somewhere on the hard disk. If you may be using several computers, a memory stick may be a useful place to save the library.

In any case, it is vital that the library files are backed up frequently – copies made and stored elsewhere in case of breakdown.

**Exercise 1: Creating a new library**

Now look at this exercise (page 44).
3 Connecting to Online Resources and Downloading

An important source of reference information is searching the many libraries and databases online. Provided your computer is connected to the internet, EndNote can search many of these directly, and download references into your library.

3.1. Connect to a Database

In the Groups panel on the left of the EndNote window, the Online Search group offers some popular bibliographic databases to search. When EndNote is installed, the software comes with details and credentials for connecting directly to these databases.

3.2. Search

When you click a database name in the Online Search group, the Search panel at the top of the window becomes active. The drop-down list confirms that you are about to search a remote library.

![Search panel](image)

*Figure 6 Searching a Remote Database*

Here you set up your search, with appropriate criteria. Notice that the fields and relationships available in the drop-down lists vary, depending on the database you are using. Different databases offer different fields to search, eg. PubMed has its proprietary number system PMCID, which in some disciplines is now compulsory to cite.

The * wildcard can be used in search phrases here, for example heal* finds healing and health. A word can be truncated to the left or the right using *. When you click , a list is then assembled of matching references found in the remote database. Depending on your search criteria, there may be a large number of matches and it may take some time to download all the details.

3.3. Import

The reference details are imported immediately into your EndNote library, including all the fields that are available from the remote database you used. (Note this is different behaviour from early versions of EndNote.)

The references imported are listed in a temporary group, under the Online Search heading. As more references are added, the total count is shown beside All References at the top of the Groups panel (top left-hand corner).

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1 If no database names appear in the Online Search group, confirm that Integrated mode is set (see part 3.5)
Now you should inspect each of the references, double-clicking if necessary to see further details. Those which are not needed should be deleted. Notice that deleting a reference from an Online Search group also deletes it from the main library of All References.

By holding CTRL (or the CMD key) while clicking, you can select a number of references at once, ready to delete them all.

3.4. Online Search Group Behaviour

Recent searches appear as temporary groups in the Groups panel, where you can review the items recently collected. A new online search can be started by using an existing Online Search group.

The Online Search groups are emptied and search criteria are forgotten when you exit the library.

3.5. Aside: Library Window Display Modes

At the left end of the EndNote toolbar are a trio of buttons similar to this: [ ] or [ ] or [ ]. Make sure you have the Integrated Mode selected (try clicking it until it looks depressed). This will give the default behaviour described here. You can read more about window display modes in EndNote's Help.

Exercise 2: Collecting references from a remote database

Now look at this exercise (page 45).
3.6. Searching Other Libraries and Databases

When EndNote is installed, it comes with details and credentials for connecting to many hundreds of libraries internationally. A list appears if you click more... in the Online Search group. Alternatively, use ☯ (Windows) or Tools|Online Search (Mac).

In the Choose A Connection dialog, you can see the connections that are available, and choose the one you want to use. When you click Choose, it may take some time for EndNote to display the next step.

![Choose A Connection](image)

*Figure 8 Choosing a Connection File*

**Note:** There is an entry in the Connections list for “U Oxford”. With this connection, you are searching Oxford University’s catalogue, which means SOLO but not the ORA research archive.

With some catalogues, you will get better search results if you can be identified as a member of the University of Oxford. This applies if you are using a computer that is connected (by a cable such as ethernet) to the University network or if you have VPN running. Read more about VPN at the IT Services website.

3.7. More Connection Files

The Connect tool needs all the correct details in order to interrogate an online library or database. The internet addresses and credentials for each database are
saved in a special file called the connection file. A large number of ready-made connection files are supplied with EndNote.

If you need to connect but do not have the correct connection file, or if you suspect that your connection file is out of date (research databases do change their arrangements occasionally), you must obtain a suitable connection file. This will have a filename of the form \texttt{Database Name.enz}.

In EndNote for Windows, the Connection Manager (found using \texttt{Edit|Connection Files|Open Connection Manager}) includes a link to get more on the web. At the EndNote website you can find and download further connection files.
In *EndNote for Mac*, more connection files are found using the **Customizer** (on the **EndNote** menu).

New or updated connection files relevant to your field of study may also be available from your department or librarian. New connection files are being created all the time, so it may be worthwhile sending a request to *EndNote*.

When asked, choose to save the connection file. It should be saved in the location where your *EndNote* stores all connection files. This varies, depending on your installation details, but typically may be similar to:

```
C:\yourname\Documents\EndNote\Connections
```

Once the `.enz` file is saved in the **Connections** folder, this resource will appear in the list of possible connections in the **Save A Connection** dialog.

You can download some connection files which have been configured specifically for users who are members of Oxford University. For details, in the ITLC Portfolio [http://portfolio.it.ox.ac.uk](http://portfolio.it.ox.ac.uk) search for “EndNote connection”.

### 3.8. Note on Visiting Libraries’ Own Websites

It is also possible to visit websites which are dedicated to individual libraries or databases, to research your work topics. Some (but not all) of these websites have their own special tools for exporting selected reference details directly into an *EndNote* library. This will be discussed in a later course in this IT Learning Centre series.
Exercise 3: Collecting further references online

Now look at this exercise (page 47).
4 A Reference in Detail

Once references have been downloaded into the library, it is important to check through each one promptly, correcting any problems with the content.

4.1. Editing in the Reference Panel or in a Separate Window

The Reference panel appears at the bottom or the right-hand side of the library window. It shows the data in each field of the reference – it may be necessary to scroll down to see more fields.

Alternatively, double-click an individual reference in the list, to see its contents in full in a separate window.

In either view you can edit the details of a reference, including:
- add or alter details
- move between fields using the mouse or TAB/SHIFT+TAB
- change the reference type
- toggle between showing or hiding empty (unused) fields
- ... many other functions are available here

Note that if a reference is open in a separate Reference window, then you can’t edit it in the Reference panel.

Figure 11  EndNote library with Reference Panel at Right or Bottom
4.2. Entering Field Details

Now you type or correct some details in the various fields. An author, year and title are usually the minimum needed, although the library will be more useful if you collect richer data about your research (see Part 4.4).

The Options button  or  allows you to hide or show empty fields.

**Exercise 4: Editing individual references**

Now look at this exercise (page 48).

4.3. Syntax of Author and Similar Names

An author’s name is entered in this form:

**Smith, John Fred**

The comma follows the surname. If the first names are known, they should be entered in full, so that *EndNote* can compute the initials whenever that is required in a final document(s).

Two or more authors should appear on separate lines, so you press ENTER between names:

**Smith, John Fred [ENTER]**
**Jones, Sarah L**

An organisation may have a long name, in which case a comma is needed at the end of the name:

**University of Oxford,**

For corporate authors with a comma in the middle, make it a double comma:

**Baker,, Miller & Co**
4.4. Some Useful Fields

There are a number of types of data you might want to include with your references. This builds the library into a research centre which is much richer than a simple list of titles, authors and years.

Most researchers now scroll through the reference, correcting or completing as many fields as possible with data that they have to hand. For example:

**Keywords**

A useful plan is to draw up a list of key terms and phrases and assign one or more to each reference, as they accumulate. This creates a flexible tool for searching and categorising references as the library grows.

A set of keywords may be topic-related (Tudor life/politics/monarchy/ecclesiastical) or functional (essential/irrelevant) or task-related (Chapter2/Chapter3/Chapter4/Archive). Type one phrase or word per line.

**Date and Year**

*EndNote* does not format dates automatically, so it is important to enter them consistently e.g. 23-12-2009 or 23 Dec 09 but not a mixture

**Title**

Be consistent with capitalisation - some output styles will convert to Headline Case or Sentence case, but others simply produce the article title as it is in the library

**Research Notes**

A useful place to put your own research notes, because this field is available in every reference type and it is unlikely to be overwritten by data pulled from online databases.

**Database**

Make notes of which database (and which database provider), if references were found online using remote databases

**URL**

Type or copy/paste a web address if you know where online the full text of a paper can be found. This appears as a clickable link.

**DOI**

Some libraries and catalogues provide the location information for full text papers in the form of a Digital Object Identifier. This is more reliable than an ordinary URL address, because those are liable to be changed or moved by their owners without notice.

**PMCID**

(used in medical publications) A PMCID is a unique PubMed Central reference number, which is assigned to each full-text record made available in PubMed Central

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*2 Beware that the Notes field is used by some online databases as a place to store extra data about the reference, which does not fit into other EndNote fields, so that is not a good field for your own research notes and observations.*
4.5. Fields for Managing the References

Date-Stamps
It is useful to have date-stamps on each reference, showing when it was added and when it was last edited. *EndNote* adds this information automatically, and keeps it up to date. After a reference has been saved the first time, the dates appear on the status bar if the individual reference is displayed in its own window. You cannot edit this information.

My Rating Stars
You can mark each reference according to its value to you, with a scale from no stars to five stars. This field can be clicked in the main library list.

Read/ Unread
If a reference has not yet been viewed or edited, its entry in the main library list appears in bold and a grey disc appears in the left-most column. After it has been viewed, the entry text is automatically set to non-bold and the disc changes to white.

Click the disc in the left-most column to force its status to toggle between Read and Unread.

Note that by default the read/unread flag here reports whether or not you have viewed the entry in the library, not whether you have read the paper or book section itself. This automatic behaviour can be changed or even turned off in the Preferences found via the Edit menu (the *EndNote* menu on a Mac).

4.6. Closing and Saving
When enough details have been added or corrected, this reference should be closed.

With *Windows*, use the close button \( \times \) in the top right corner of the reference window (beware not to click the close button on the *EndNote* title bar, which closes the *EndNote* window).

With Mac, use the red close button \( \bigcirc \) \( \bigcirc \) in the top left corner of the reference window.

When the edited reference is closed, you are reminded about saving the changes. These reminders can be turned off if you prefer, in which case future changes will be saved automatically as you close or exit any reference.

A summary of the edited reference now forms a row in the library window.

Exercise 5: Editing reference details
Now look at this exercise (page 49).

4.7. A New Reference
There are many ways of building up a library of references, and most people use a combination. It is sometimes necessary to type reference details manually (or more likely by copy/pasting).  is the button for creating a new reference.
4.8. Choosing the Reference Type

By default, a new reference is a Journal Article (see Figure 13 below). This can be changed if appropriate by using the Reference Type drop-down list at the top of the window.

This drop-down list offers numerous other reference types, as well as the familiar Journal Article, Book etc. Changing the reference type will change the names of the fields offered, to suit typical information, and may change the way the work is cited when you insert a citation in your own documents (discussed later).

Some useful guidance for staff and students on how to cite media is given at http://bufvc.ac.uk/2013/03/27/audiovisual-citation-guidelines-launched-today.

![Figure 13 Alternative Reference Types](image)

4.9. Update Reference Details

From a reference with minimal information, EndNote may be able to retrieve more detail from online, and complete the reference. This would be useful if you have brief details from the ePub version of a paper, or just a hand-typed bibliography.

EndNote uses the DOI if present, or the Author/s, Year, and Journal title to consult CrossRef, PubMed and Web Of Science for a reference matching the one/s selected in your library. In the review dialog, you can look at each reference in turn, deciding whether absent fields should be completed and out-of-date fields should be updated.
Tip: *EndNote* has another useful tool that finds the full text of a paper (seeking to import the PDF). This tool requires the paper's DOI, so it may be efficient to use this **Update Reference Details** tool to find the DOI first, before seeking the PDF to download and attach. Learn more about Find Full Text in the related course: *Referencing: EndNote - Building your library* (see part 13.2 below).

### 4.10. Attaching Other Files

It may be convenient to store a related file in the database, associated with an individual reference. An example would be a PDF file with the full text of a paper. *EndNote* has tools to manage this, which are covered in a later course “Referencing: EndNote - Building your library” (see Part 13.2 below).

**Exercise 6: Creating references manually**

Now look at this exercise (page 51).
5 Working With A Library

A library quickly collects a large number of references, so it is important to manage the way they are displayed.

5.1. Arranging Panels

Depending on the size and shape of monitor being used, and the work in hand, it may be useful to rearrange the panels on the screen.

Buttons are used to rearrange the panels on the screen:

- Use at the bottom right corner
- Use at the top right corner

There are tabs for toggling between the Preview, Reference and PDF panels:

5.2. Column Widths

The divider between two column headings can be dragged sideways. This adjusts the widths of nearby columns. This may be useful if titles are very long, or if there is a lot of information to fit into the screen width. (A later course will deal with how to change the choice of fields to be displayed.)

5.3. Sorting

The quickest way to change the order that references are displayed is to click a column heading to sort. For example, clicking will present all the references in ascending alphabetical order by first-author’s name. Clicking the same column heading again re-sorts in descending author name order.

More complex sorts can be made using the Sort Options dialog, found from the Tools menu.
The Sort Options Dialog

Here you can select which field is used for the primary sort, and use \(\text{\textdagger}\) to choose between ascending and descending sort. Then a secondary and further sorts can be set using the remaining drop-down lists.

5.4. Deleting a Reference

A reference that is unwanted, for example one which turns out to be a duplicate, can be deleted by selecting it in the main library list and pressing DELETE (CMD+D for a Mac). When deleted, the reference moves to the Trash group, shown in the Groups panel on the left of the screen.

An item in the Trash can be retrieved, by dragging it out of Trash.

When the EndNote library is closed, any references in the Trash will be cleared permanently (a confirmation dialog is shown, to remind you).

Exercise 7: Controlling the library display

Now look at this exercise (page 52).
6 Searching Within a Library

6.1. Quick Search

Use the Quick Search tool to find a particular reference or references. Type text or numbers into the drop-down list on the EndNote toolbar, to display a list of the references in the library which contain that text/numbers in any field.

![Quick Search tool](image)

**Figure 16 Using the Quick Search tool**

6.2. Internal Search

The Search panel is across the top of the EndNote window. If the Search panel is not visible, show it using (Windows) or Mac).

This is needed for anything beyond the simplest searches in your library.

![Search Criteria](image)

**Figure 17 Search Criteria**

Here you set up one or more criteria, then EndNote will display all references from the library which match your criteria. In each of the criteria rows, you type a value (which may be text or numbers), then choose the field where that value may be found.

When you click , the search is carried out and all references which match your criteria are displayed.

The results – a list of all references which match your criteria – are shown in a temporary group called the Search Results. This is listed in the Groups panel, at the left of the EndNote window. Here you can switch between viewing All
References and Search Results (and indeed Trash) as convenient. Notice that an item in the library continues to be listed among the All References, even if it also appears in the Search Results subset.

6.3. Setting Further Search Criteria

![Figure 18 More Complex Search Criteria]

Multiple criteria can be set up using the rows in the dialog, choosing connectors such as AND, OR or NOT. In the example of Figure 18, this would find any journal articles written by a first author beginning with C. A variety of comparators are available, beside the usual Contains.

More field rows can be added as needed, using +, or removed using -.

Note on matching words:
Usually EndNote looks for your text anywhere in a field so “Contains here” would find “where” and “heretic”, but if you only want the word “here” you must check the Match Words checkbox.

Note on searching dates:
Bear in mind when searching on dates that information in date fields is held as crude text, not as flexible date formats as you may have encountered in MS Office software. So, for example, searching for “99” in the Year field will find items from 1995 as well as 1899 and 1999. If dates in your library have been entered in the form 23-07-2011, then you cannot find July references by entering July in a search.

6.4. Useful Search Strategies

For a wider search, when you cannot be specific, try searching for a term or phrase in “Any Field” - this is likely to return a lot of matched references.

In the field list, there is a useful option to search the PDF with or without your annotated notes (learn more about how EndNote can manage your collection of PDF full-texts of papers in a later course – see Part 13.2 below).

Search for empty fields by putting nothing in the search-text box then choosing Is rather than Contains as the comparator. For example, a search on the DOI field that uses Is with nothing in the search-text box will find all references where the DOI has not been given.

A search can be based on Rating stars (see Part 4.5 above).
6.5. Displaying All References After a Search

After using Search, you can display the full set of references by clicking All References in the Groups panel (or by the useful keystroke CTRL+M in Windows or SHIFT+CMD+M with a Mac).

Note that when you click , EndNote searches the references that are currently showing. It is important to show all references after a search, and before running another search (unless you only wish to search among the subset).

6.6. Saving a Search

A search can be saved using Save Search from the Options... or button. This saves the description of the search (fields, criteria, relationships etc.) not the results. You might re-run a saved search again some time later using Load Search, to identify what has changed in your library.

6.7. Usefulness of the Search Tool

It is worthwhile mastering this Search tool, as it is used in many contexts in EndNote work. Housekeeping and management tasks are often applied to “all visible references” so you will use this Search tool to display just the set of references that you need in each operation.

Exercise 8: Searching within the library

Now look at this exercise (page 54).
7 Groups

An *EndNote* library quickly becomes large, typically containing several thousand references. Groups provide an efficient and flexible way of managing them. You can set up a number of groups, for various purposes, and specify which references belong to each group.

The Groups panel usually appears at the left-hand side of the *EndNote* window. If it is not visible, will display it.

7.1. Working With Groups

A group is a subset of your library of references.

A given reference can belong to several groups, for different purposes. Some groups may be topic-related, such as 13th century, Monastic Literature, platelet bonding, Capitalism. Others may be administrative such as Chapter 1, Chapter 2 (for a book) or BlueSkies (for possible future research).

*Note:* it is usually not good practice to separate references into a number of libraries, because they are then difficult to manage. It is not possible to search across multiple libraries. It is also likely that the same item (journal article, book etc.) will be included in more than one library, becoming difficult to maintain and leading to ambiguities when you cite the items in your own work. One library, even a large one, is more easily managed, especially if you set up appropriate groups.

An *EndNote* library can have a maximum of 5000 groups (custom or smart).

7.2. Automatic Groups

You are already familiar with the built-in *EndNote* groups Trash and Search Results, and how to display their contents by clicking the group name in the Groups panel (at the left of the screen). After inspecting the contents of a group, you can display the full library again, by clicking All References in the Groups panel.

References which have recently arrived in the library, downloaded from an online source, are displayed in the Online Search group temporarily.

Any references which are cited in a Word document that is currently open are listed in an automatic citation report group that is named after the filename of the document.

7.3. Custom Groups

You can create several custom groups, and nominate which individual references belong to each group.

On choosing Groups|Create Group, you can give a suitable name.
Creating a New Custom Group

Now individual references can be dragged from the main list and dropped onto the group name in the Groups panel. Notice that the reference does not leave the All References list – you are not making a duplicate copy of the reference, nor transferring it into another container, you are making a shortcut so the reference becomes a member of the group.

A collection of references, such as the results of a search, can be sent into a custom group: after displaying the desired subset of references, select them and choose Groups|Add References to [name of group].

Sending the Results of a Search to a Custom Group

---

**Figure 19** Creating a New Custom Group

**Figure 20** Sending the Results of a Search to a Custom Group
7.4. Deleting an Item From a Custom Group

A reference can be removed from a group, as necessary, by displaying the group, selecting the reference and pressing DELETE or choosing Groups|Remove References from Group.

Note that in removing a reference from a custom group, you are not deleting it from the library.

7.5. Discovering Which Group/s a Reference Belongs to

With one reference selected, References|Record Summary will report which group or groups the reference belongs to. Note that a reference can belong to several groups.

Any reference which is not a member of any group is considered Unfiled.

Exercise 9: Working with custom groups

Now look at this exercise (page 56).

7.6. Creating Smart Groups

A smart group is populated automatically by EndNote, as defined by a search strategy. Whenever more references are added to the library, EndNote checks whether any of them qualify as members of the smart groups, and adds them automatically – the group dynamically updates.

A new smart group can be created via Groups|Create Smart Group. In the Smart Group dialog, you devise a search strategy, which becomes the definition of the group.

Another way to create a smart group is to set up a search in the familiar Search panel, confirm that it does find the references intended, and use Options... to Convert to Smart Group.
Note that a smart group definition can be based on rating stars.

Notice the different icons used to distinguish Custom Groups from Smart Groups (and others to be discussed shortly).

Exercise 10: Creating smart groups

Now look at this exercise (page 58).

7.7. Using Smart Groups

Smart groups are self-populating. Any references which match the search criteria of a smart group will automatically be included in that smart group. View a smart group’s contents by clicking its name in the Groups panel.

If a new reference is added to the library, either manually or by downloading (as described in Part 3), then if it matches a smart group’s criteria it will automatically appear in that smart group.

Exercise 11: Working with smart groups

Now look at this exercise (page 59).
7.8. Combination Groups *(Optional)*

Once you have a number of groups, each having several references, it may be useful to combine them logically.

![Creating a Group by Combining Groups](image)

*Figure 23 Creating a Group by Combining Groups*

The **Create From Groups** command (on the **Groups** menu) is useful for logically combining groups. A new combination group may be based on a mixture of up to 10 existing custom groups or smart groups, using logical AND, OR and NOT.

7.9. Managing Groups in Group Sets *(Optional)*

Once you have a number of groups of various types, it may be convenient to organise the groups further. A Group Set is a container where groups can be collected.
Organising Groups into Sets

One group set is provided, called **My Groups**. Others can be created, using commands from the **Groups** menu, and given suitable names. Groups can be dragged into a group set, and dropped in.

Group sets can be rearranged in the Groups panel, by dragging them up and down the panel. The Group sets, including the permanent ones such as **Online Search** and **Find Full Text**, can be placed in any convenient order.

**Exercise 12: Combining Groups (Optional)**

Now look at this exercise (page 61).
8 Citing References In A *Word* Document

In your own written work, you will want to cite some of the references you have collected in your library. *EndNote* can help with inserting citations and with managing their appearance in a word-processed document.

8.1. *EndNote* as an Add-in for *Word* for Windows

*EndNote* includes an add-in for *Word for Windows*. This means that once *EndNote* is installed on your computer you can use some of its commands from within the word-processor.

A special ribbon tab is added to the standard *Word 2013* complement.

*Figure 25 Word for Windows, Showing the EndNote Tab on the Ribbon*

8.2. *EndNote* as an Add-in for *Word* for Mac

*EndNote* includes an add-in for *Word for Mac*. This means that once *EndNote* is installed on your computer you can use some of its commands from within the word-processor.

A special toolbar is added to the standard *Word 2011* complement - if it is not showing, you may be able to display it using *View|Toolbars*.
8.3. Versions of Word with Versions of EndNote

Each version of EndNote is designed to work with a specified version of Word. Compatibilities are listed at the EndNote website, and you are encouraged to check here for the latest status. Details and website links are given in the ITLC Portfolio: visit http://portfolio.it.ox.ac.uk and search for “EndNote software”.

Updates and patches are available at EndNote’s own site, from time to time, and you should keep all your software fully patched and updated.

8.4. EndNote with other Word-Processors

EndNote can be used alongside other word-processors, although the interaction is less polished. Of course, EndNote will always be useful for building and managing a library of references and paper PDFs, irrespective of the word-processor used.

8.5. Inserting a Citation

For inserting citations, have the document open in Word and the library open in EndNote. Use ALT+TAB or CMD+TAB (or the buttons on the Taskbar or the Dock) to switch repeatedly between the two applications.

With the insertion point in the Word text, at the position where a citation is required, there are (at least) two methods for creating a citation.

One method is to click or in EndNote to insert the selected citation into the Word document.

An alternative method is to use or in Word (and choose Find Citation if a menu appears). A search dialog appears, where you type a name, year or any search term. EndNote then lists all references from your library which match the search text. You can select the one you require and it in your document.

Some authors prefer to type the raw data that specifies their reference, inside curly brackets e.g. {Taylor, 2012}. EndNote then searches the library for a matching reference and formats the citation. If the matching reference cannot be found, or is ambiguous, the Find & Insert dialog appears where you can select.
Referencing: Up & running with EndNote

Exercise 13: Citing a reference in a *Word* document

Now look at this exercise (page 62).

**8.6. Citations in Footnotes (Optional)**

It is common in some fields of study, notably Humanities departments, to place citations in footnotes rather than within paragraphs of text. This can be done by creating a simple *Word* footnote and inserting an *EndNote* citation in the footnote, using any of the insertion methods discussed in Part 8.5 above.
Introduction

We study our Earth for many reasons: to find water\textsuperscript{1} to drink or oil to run our cars or coal to heat our homes, to know where to expect earthquakes\textsuperscript{2} or landslides or floods, and to try to understand our natural surroundings.

Earth is constantly changing - nothing on its surface is truly permanent. Rocks that are now on top of a mountain may once have been at the bottom of the sea. Thus, to understand the world we live on, we must add the dimension of time. We must study Earth's history\textsuperscript{3}.

\begin{figure}
\centering
\includegraphics[width=\textwidth]{figure28}
\caption{A Document With Citations in Footnotes}
\end{figure}

The detailed appearance of citations in footnotes again depends on the output style chosen for that document. Some styles simply use the bibliography template, while others have a dedicated template controlling the format and layout of citations in footnotes.

If the footnote numbering is not suitable, Word's own Footnote formatting commands can adjust this.

Exercise 14: Citations in footnotes - \textit{Optional}

Now look at this exercise (page 64).
9 Working With Citations

9.1. Multiple Citations

With the insertion point at the correct position in the text, you can select two or more references in the EndNote library (by holding down CTRL or CMD while clicking several references in turn), then insert them in your text as described above.

Alternatively, insert a second citation into your document adjacent to one created earlier, and they will be re-formatted as a multiple citation.

EndNote will arrange suitable punctuation, such as placing all adjacent references within one pair of brackets, and separating references with semicolons; etc.

9.2. Numbered Citations

Depending on the output style chosen, citations in your Word document may be numbered. These numbers are assigned and maintained automatically. When a new citation is inserted, it is given a suitable number, and if necessary other citations in the document are re-numbered. The bibliography is adjusted.

Similarly, if portions of text are rearranged - perhaps by Cut and Paste - then any citations which they contain will be renumbered.

Aside: For major rearrangements of text, it is safest to work with the citations unformatted. This is discussed in a later IT Learning Centre course (see Part 13.2 below).

9.3. References Cited in Each Document

As citations are inserted into a document, a citation report group is built up, which can be viewed in the Groups panel in EndNote. These citation report groups keep track of where you have cited the items from your library (of the documents open currently).

Figure 29 Citation Report Groups Shown in EndNote
9.4. Effect of Editing a Reference

If more details come to hand, or if you discover that some details were not correct, then of course these must be edited in the *EndNote* library.

If the reference has already been cited in a document, the in-text citation will be updated automatically in due course, the next time the bibliography is formatted (as described in Part 11.1 below). This varies somewhat, depending on whether Instant Formatting is turned on (Instant Formatting is discussed in a later IT Learning Centre course).

If it is necessary to force the citations (and bibliography) to be updated, use ![Update Citations and Bibliography](image) or ![Update Bibliography](image).

**Exercise 15: Working with citations**

Now look at this exercise (page 65).
10 Bibliography

The bibliography is a list of all the citations in a given document, with more detail than can usually be included in the in-text citations. As citations are added to a Word document, a bibliography assembles automatically.

*EndNote* assembles the bibliography and places it at the end of the Word document. As more citations are added, or if they are edited, the bibliography is automatically updated.

If it is necessary to force the bibliography (and citations) to be updated, use ![Update Citations and Bibliography](update.png) or ![Edit Bibliography](edit.png).

Note that the appearance of the bibliography - which fields are included, how they are punctuated and formatted etc - depends on the output style chosen.

Exercise 16: Bibliography

Now look at this exercise (page 66).
11 Formatting Citations and Bibliography

11.1. Using Output Styles

*EndNote* has a large library of pre-designed formats for the citations you include in your written (Word) work. These are known as output styles. It is easy to change the style for a given document, and this changes the layout of the whole set of citations and their punctuation, formatting etc.

A few output styles are immediately available in the Style control in the *EndNote* ribbon tab (Windows) or on the *EndNote* toolbar (Mac).

![Style control on the EndNote Ribbon tab (Windows)](image)

*Figure 30* Style control on the *EndNote* Ribbon tab (Windows)

![Style control on the EndNote toolbar (Mac)](image)

*Figure 31* Style control on the *EndNote* toolbar (Mac)

For more choices of output style, choose **Select Another Style** from the Style control. This displays the available styles:

![Choosing an Output Style](image)

*Figure 32* Choosing an Output Style
11.2. Impact of Changing the Output Style

Another output style will present citations differently, perhaps including more or fewer fields, or showing them in a different order, or with different punctuation or formatting. In each case the citation itself - which is a Word field code - is not changed, as this is simply a pointer to the relevant reference in the EndNote library.

**Author-date**

Thus, to understand the world we live on, (Whiting, Billoski et al. 1987) we must add the dimension of time. We must study Earth's history.

**MLA**

Thus, to understand the world we live on, (Whiting, Billoski and Jones) we must add the dimension of time. We must study Earth's history.

**Numbered**

Thus, to understand the world we live on, [4] we must add the dimension of time. We must study Earth's history.

*Figure 33 Effect of Output Style on an In-Text Citation*

In the same way, a change of output style also transforms the bibliography.

The output style also controls the appearance of the citations in footnotes, which may either echo the bibliography entries or have their own distinct appearance.

11.3. Changing Between Output Styles

It is common to change between output styles frequently. An author may re-format the same document to suit different styles for different target audiences, or to conform with the requirements of the different publishers.

Tip: if you are planning to use a numbered style in a document, you may prefer to use a more detailed style while drafting the document, such as Author-Date. This means you can read and understand the references in the text while editing. In the final stages of preparation, you can change to a numbered style such as Vancouver, which is more compact as required by some publishers.

Note that changing the output style is likely to change the amount of space taken up by citations, and thus the pagination of the document. It is important to update all page numbers, cross-references, tables of contents etc. after applying the final output style.

11.4. Choosing Which Output Style to Apply

EndNote comes with a library of many hundred styles ready designed. It is likely that one of these will be suitable for your documents.

The Style control is found on the EndNote ribbon tab (Word for Windows) or on the EndNote toolbar (Word for Mac). This lists a few recently-used styles. It may be sufficient to try each of these and choose one which is acceptable.
For more styles, choose Select Another Style from the Style control, to see a list of further styles that are available.

You may recognise the name of a style which is commonly used in your field (talk to colleagues, Library staff and members of your department). Notice that many of the styles are named after established journals, and these have been devised in collaboration with the publishers to conform to their requirements. Choosing the style of a journal that is widely read in your field may be a practical route.

Harvard, MLA, Vancouver, Author-Date are all popular styles used in various departments at Oxford University. An article in the ITLC Portfolio lists popular styles which form the basis for many of the others in common use.

If publishing, read the “Author Guidelines” at your publisher’s website: they may name the style they prefer.

11.5. Previewing Output Styles

A preview is provided within EndNote itself, which although limited may help you choose a suitable style.

In EndNote, the drop-down for choosing a style looks like this:

![EndNote Style Selection Dialog]

The top item on this list is Select Another Style, which leads to the following dialog:

![EndNote Style Selection Dialog]

**Figure 34 Choosing an Output Style Within EndNote**

If the lower portion of the dialog is hidden, More Info reveals it.
Referencing: Up & running with EndNote

**Style Info/Preview** can be used to show a Style Preview. This gives a useful preview of the way that the selected style would present a typical journal article, book and edited book.

### 11.6. More Resources for Output Styles

A wider range of styles can be found online via the Style Manager. This can be opened in *EndNote*, by choosing **Edit|Output Styles|Open Style Manager.**, and clicking **Get More on the Web...**.

A useful Style Finder is available at the *EndNote* website: http://www.endnote.com/support/enstyles.asp. Here you can filter a list of styles, by journal name, citation “style” or publisher.

Another approach is to build your own style. This is discussed in a later IT Learning Centre course.

**Exercise 17: Changing the output style**

Now look at this exercise (page 67).
12 Aside: *Word’s Own Citation Tool (Optional)*

*Word 2013* has its own citation tool, found on the `References` tab of the ribbon. In *Word 2011* the citation tool is found on the `Document Elements` tab of the ribbon.

With this tool, you would build up a list of works using the Source Manager. For a particular document, you insert citations of selected works among your text. A limited range of output styles is available, for formatting the citations and building a bibliography.

If you are using *EndNote* to manage your citations and bibliography, ignore *Word’s* tool.

*EndNote* has an option to convert any such existing *Word* citations into *EndNote* citations, and import them into the *EndNote* library.
13 Other Resources

Now that you have some useful EndNote skills you may want to develop them further. IT Learning Centre offers a range of resources for study and teaching.

In all cases, please refer to the Oxford IT Courses web page (www.it.ox.ac.uk/courses) for further details.

13.1. Downloadable Course Materials and More
- the ITLC Portfolio

These course materials are available through the ITLC Portfolio, at http://portfolio.it.ox.ac.uk.

Each course pack includes the course handbook in PDF form and a zip folder of the exercise files that you need to complete the exercises. Archive versions of the course book may also be useful if you use an earlier version of the software.

The ITLC Portfolio helps you find articles, videos, resources and weblinks for further IT study. For some resources, you will be asked for your Oxford (SSO) username and password.

13.2. Further Referencing Courses

Please refer to the IT Learning Centre catalogue (via www.it.ox.ac.uk/courses/) for further details.

Referencing: Building your EndNote library
Referencing: Citations and bibliographies with EndNote
Referencing: Choosing and using software (Bodleian iSkills)
(compares several similar tools)

EndNote courses are taught using either Windows or Mac.

13.3. Word-processing Courses

Documents: Academic writing - Good practice with formal documents
- Managing Your Thesis
- Building Long Documents

13.4. Clinics

We encourage everyone to work at their own pace. This may mean that you don’t manage to finish all of the exercises for this session. If this is the case, and you would like to complete the exercises while someone is on hand to help you, come along to one of the bookable Clinics that run during term-time.

More details are available from the IT Learning Centre course catalogue (via www.it.ox.ac.uk/courses/).

13.5. IT Services Help Centre

For Help Centre opening times, follow links to the General Helpdesk from www.it.ox.ac.uk/help/gettinghelp/ or contact them by email on help@it.ox.ac.uk.
13.6. Useful Websites

The main site for EndNote software: www.endnote.com/
Style Finder at www.endnote.com/support/enstyles.asp

Adept Scientific, UK supplier of EndNote
http://www.adptscience.co.uk/

Bilaney Consultants, UK supplier of EndNote
http://www.bilaney-consultants.co.uk/our-products/endnote.html

Bodleian website: www.bodleian.ox.ac.uk/
Oxford University Library Service

SOLO Oxford University library catalogue: http://library.ox.ac.uk/
Search the union catalogue
Reserve items for later collection

OxLIP+ e-resources: http://oxlip-plus.bodleian.ox.ac.uk/
Portal connects to many international databases, listed by Subject or alphabetically by Title

Online tutorials from the EndNote company: www.endnote.com/training
## Appendix: Student Exercises

### Exercise 1  Creating a new library
- Start EndNote
- Create a new library
- Give it a suitable filename
- Think about where you will save your real library

<table>
<thead>
<tr>
<th>Task 1</th>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start EndNote</td>
<td>Start the computer if necessary</td>
</tr>
</tbody>
</table>

#### Step 2
- Click
  - In the Start menu, explore the folders and look in the EndNote folder
- Click
  - In the Finder, explore the Applications folders and look in the EndNote folder

#### Step 3
Choose EndNote

#### Step 4
If an existing library appears, close it (leaving EndNote open)
If a message appears about being unable to find a certain library, cancel it – you are going to create your own library

<table>
<thead>
<tr>
<th>Task 2</th>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a new library named FieldStudy</td>
<td>Choose File</td>
</tr>
</tbody>
</table>

#### Step 2
In the New Reference Library dialog, use the Save in drop-down to navigate and set the place to save:
- If you are working in one of our teaching rooms, you have been allocated an area which is called Drive H
- On your own computer, choose a convenient place to save your work

#### Step 3
In the File name box, type FieldStudy, which will be the filename of your new library

#### Step 4
Click Save or Save
The new (empty) library appears as a window within EndNote
### Task 3
When, later, you create your own library for real work, think about a suitable location – will you save it on your local computer hard drive, on a departmental network, on a removable drive?
What will be your strategy for making frequent backup copies of your library?

### Task 4
Leave the **Fieldstudy** library open for next exercise

<table>
<thead>
<tr>
<th>Exercise 2  Collecting references from a remote database</th>
</tr>
</thead>
<tbody>
<tr>
<td>- <em>Use EndNote’s built-in Online Search tool</em></td>
</tr>
<tr>
<td>- <em>Search a remote database for references that match criteria</em></td>
</tr>
<tr>
<td>- <em>Download references into your library</em></td>
</tr>
<tr>
<td>- <em>Reject some unwanted references</em></td>
</tr>
</tbody>
</table>

### Task 1
Continue work in your new FieldStudy library (or open **FieldWork Study.enl** which is provided for you)

### Task 2
At the left end of the **EndNote** toolbar is a trio of buttons similar to this:

- **Windows**: ![Windows button](image)
- **Mac**: ![Mac button](image)

Make sure you have the **Integrated Library & Online Search Mode** selected (refer to Part 3.5 above).

### Task 3
Display the Groups panel and the Search panel

<table>
<thead>
<tr>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>If the Groups panel is not showing at the left of the <strong>EndNote</strong> window, try these to display it:</td>
</tr>
<tr>
<td><img src="image" alt="Layout button" /> at the bottom right corner</td>
</tr>
<tr>
<td><img src="image" alt="Layout button" /> at the top right corner</td>
</tr>
</tbody>
</table>

### Task 4
Connect to the Web of Science

<table>
<thead>
<tr>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>In the Groups panel, click <strong>Web of Science</strong></td>
</tr>
<tr>
<td>If Web of Science is not listed, refer to Part 3.6</td>
</tr>
</tbody>
</table>
### Task 5
Search for items with **British dinosaur** in the title

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Clear the Search panel of any previous settings</th>
</tr>
</thead>
</table>
| Step 2 | In the Search panel, enter *British dinosaur* in the text box  
Select **Title** in the field box  
Click | |
| Step 3 | If a dialog tells you the number of references found is more than about 20, cancel and revise the criteria to make the search more selective |
| Step 4 | If about 12 references are found, click **OK** to see them listed in the **Online Search** group for Web of Science  
The details of your found references have immediately been copied into your **EndNote** library  
This may take a few seconds |
| Step 5 | Notice that the total number of references in the library is reported as **All references** at the top of the Groups panel |

### Task 6
Review the list and delete some, leaving about 5 which look interesting – these have already been downloaded into your library

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Examine the references presented</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2</td>
<td>Identify about 5 promising references from the list</td>
</tr>
</tbody>
</table>
| Step 3 | Select an unwanted reference  
Press **DELETE** or **CMD+D** |
| Step 4 | Hold **CTRL** or **CMD** while clicking all the other unwanted references in turn until you have several selected  
Press **DELETE** or **CMD+D** |
| Step 5 | The unwanted references are now deleted from your library  
Notice that the count of **All references** in the library has been updated |

### Task 7
“Web of Science core” is one of the websites that give better search results to members of the University of Oxford. If your computer is not plugged in by ethernet cable to the network in a University building, you should run VPN before searching. Read more about VPN in the IT Services website.
<table>
<thead>
<tr>
<th><strong>Task 8</strong></th>
<th>Close the library, leaving <em>EndNote</em> open</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Task 9</strong></td>
<td>Close the library, leaving <em>EndNote</em> open</td>
</tr>
</tbody>
</table>

### Exercise 3  Collecting further references online
- Connect to another library online
- Download further references
- Further connections are available

<table>
<thead>
<tr>
<th><strong>Task 1</strong></th>
<th>Close any library that is still open</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Task 2</strong></td>
<td>Open the library called <strong>Paleo2.enl</strong></td>
</tr>
</tbody>
</table>

**Step 1**
- Use `File|Open`
  Navigate to the place where your files are - if you are working in one of our teaching rooms, you have been allocated a home drive which is called Drive H

**Step 2**
- Locate the library **Paleo2.enl** and open it

| **Task 3** | Click ![Library Icon] or **Tools|Online Search** or choose **more...** at the bottom of the list of **Online Searches** (in the Groups panel)  
Look through the list of libraries which *EndNote* could connect to |
|------------|-------------------------------------------------|

| **Task 4** | Search the CAB Abstracts (OVIDSP) catalogue for 2012 items with **dinosaur** in the title  
No password credentials are necessary |
|------------|------------------------------------------------|

**Step 1**
- In the **Choose a Connection File** dialog, select **CAB Abstracts (OVIDSP)** and click ![Choose Button]
  You may be asked for a password, but none is necessary

**Step 2**
- Delete any entries in the **Search** panel, left over from previous searching

**Step 3**
- In the first row of the **Search** panel, select **Title** in the first box and leave **Contains** in the next one  
Type **dinosaur** in the next box

**Step 4**
- Click ![Search Button]
  It will probably find a few references

<table>
<thead>
<tr>
<th><strong>Task 5</strong></th>
<th>Download the references into your library</th>
</tr>
</thead>
</table>

**Step 1**
- Click ![OK Button] in the **Confirm Online Search** dialog, to download the references into your library
### Task 6
Reject about 3 unsuitable references

#### Step 1
Notice that the downloaded references have automatically been displayed in a group called **CAB Abstracts (OVIDSP)**.

#### Step 2
Examine the references found.

#### Step 3
Multi-select about 3 references which do not look interesting (hold CTRL or CMD while clicking). Press DELETE or CMD+D to remove them.

---

### Exercise 4  Editing individual references

- Open a reference for editing
- Editing in the Reference panel or in a separate window
- Saving a reference
- Date stamps
- Hide and show unused fields

---

### Task 1
Continue work in the **Paleo2** library

---

### Task 2
View the Alvarez reference in the Reference panel

- Change the year to **2013**

#### Step 1
Select the Alvarez reference (click just once)

#### Step 2
Use the **Layout** button and tabs to show the Reference panel at the side of the screen.

#### Step 3
In the **Year** field, edit the year to be **2013**

#### Step 4
Save the Alvarez reference by moving to (clicking on) any other reference.

---

### Task 3
Open a reference in a separate window and notice the date stamp

#### Step 1
Double-click the Babcock reference in the library list, to open it in a separate window.

#### Step 2
Notice that the date-stamps for this reference now appear in the status bar (at the bottom of the window). These stamps are managed automatically: you cannot change them.
### Task 4
Practice hiding and showing the unused fields in a reference

#### Step 1
Use the options button 📜 or ⬇️ at the top of the Reference panel to hide all fields that have not been used for the current reference.

Note you cannot hide empty fields in a new reference until it has been closed and re-opened once.

#### Step 2
Swap between showing and hiding the empty fields.

Finally, show the empty fields.

### Task 5
Examine some references in a separate window: noticing the reference types and fields used

#### Step 1
Continue with a reference open in its separate window:

Use ← and → at the top of an individual reference window, to move between references.

#### Step 2
Scroll down and notice the information that has been entered.

Note that these details are usually saved unformatted – formatting and punctuation will be added later, when citations are included in a document.

#### Step 3
When ready, close the reference to return to the library list.

### Task 6
Leave the Paleo2 library open for next exercise.

### Exercise 5  Editing reference details

- *Author name syntax*
- *Some interesting fields*
- *My rating stars*
- *Marking read/unread*

### Task 1
Continue work in the Paleo2 library.
| Task 2 | Step 1 | Select the Chang newspaper article (click just once) Its details appear in the References panel, where you can edit them |
| Task 2 | Step 2 | The other reporters (authors) were Tessa Cooper and Phil Tysdale In the **Author** field, add these other authors (take care with the syntax) |
| Task 2 | Step 3 | This item was located using the Web of Knowledge and accessed on 13th March 2013 Add this information to suitable fields |
| Task 2 | Step 4 | Notice that the abstract has already been added – if it had not, you might copy/paste it |
| Task 2 | Step 5 | Add your own remark about this article, in the **Research Notes** field |
| Task 3 | Step 1 | Click in the **Rating** column, to give this item 4 stars |
| Task 4 | Step 1 | By default, a reference that you have not viewed in detail is shown in bold text, and the marker at the left edge is a grey disc The marker changes to white after you have viewed it |
| Task 4 | Step 2 | Experiment with viewing references, to see their read/unread status change |
| Task 4 | Step 3 | You can reset the read/unread status of a reference by clicking the marker disc |
| Task 4 | Step 4 | Note that this does not report whether or not you have read the full article (for example from a PDF of a paper) This read/unread behaviour can be customised (see a later course) |
| Task 5 | The reference is saved when you click away from it, for example on another reference If asked, agree to save the new reference |
| Task 6 | Leave the **Paleo2** library open for next exercise |
## Exercise 6  Creating references manually

- Add a simple reference
- Different reference types
- The references are summarised in the library list
- Go online to update the details of a brief reference

### Task 1
Continue work in the **Paleo** library

### Task 2
Create a new reference
Look at the various reference types available

### Step 1
Click or choose **Reference|New Reference** to create a new reference

### Step 2
In the **New Reference** window, use the **Reference Type** drop-down to see what other reference types are available

### Step 3
From the list of reference types, select **Book**
Notice that when you change the reference type, suitable field names are offered

### Task 3
A book by **John E Titcombe** in **2008**
“**A practical approach to field studies**”

### Step 1
In the **Author** field, type: **Titcombe, John E**

### Step 2
Click or press **TAB** to move to the **Year** field, then type **2013**

### Step 3
Move to the **Title** field, then type: **A practical approach to field studies**
Scroll among the fields, and think about how you might use some of them in your own work

### Task 4
Close the reference (saving changes)

### Step 1
In the top corner of the reference window (not the outer **EndNote** window), click the Close button **X** or

### Step 2
If asked, agree to save the new reference
Check the checkbox **Do not display this message again** so as to save all references automatically as they close, in future

### Step 3
Notice the new reference has been added to the list of references
Task 5
Create a new reference by typing these details:

- **Author**: Dickson
- **Year**: 2015
- **Title**: Recent climate cycles
- **Ref type**: Journal article

Task 6
Update the reference, completing empty fields and out of date fields

**Step 1**
Select the new reference

**Step 2**
Choose Reference|Find Reference Updates

**Step 3**
Review the details found, accepting all updates

Task 7
Leave the Paleo2 library open for next exercise

Exercise 7   Controlling the library display

- Arranging the EndNote panels
- Delete and undelete references
- Using the Trash group
- Adjust column width by dragging
- Simple sorting
- Ascending and descending order
- Complex sorting using a dialog

Task 1
Continue work in the Paleo2 library, with the library list displayed

Task 2
If the Groups panel is not showing at the left of the EndNote window, use Groups|Show Groups to display it

Windows:
- Layout tab at bottom right, Reference tab at top of reference pane

Mac:
- at top right

Experiment with using these buttons and tabs to arrange the various panels in the EndNote window
<table>
<thead>
<tr>
<th>Task 3</th>
<th>Try deleting an item</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Select the Dardeau reference (click just once)</td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>Delete the reference by: pressing the DELETE key pressing CMD+D for a Mac or using References</td>
</tr>
<tr>
<td><strong>Step 3</strong></td>
<td>Click once on the Trash folder to display its contents Notice that the deleted item now waits in the Trash folder</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 4</th>
<th>Undelete an item from the Trash</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Retrieve the item from Trash by dragging it back to the All References or by selecting the reference (click once) and using References</td>
</tr>
</tbody>
</table>

| Task 5  | Items left in the Trash will be deleted permanently, when the library is closed |

<table>
<thead>
<tr>
<th>Task 6</th>
<th>Make the Journal column wider by dragging</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Move the mouse pointer to the divider between the Journal and Last Updated headings</td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>When the mouse pointer changes shape , drag to make the Journal column wider</td>
</tr>
<tr>
<td><strong>Step 3</strong></td>
<td>Double-clicking with will auto-fit: adjusting a column’s width to fit its contents (beware using this on the Title column whose contents may be very long!)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 7</th>
<th>Sort the references by Year Try out some other simple sorts by clicking column headings</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Click the Year column heading Notice that the references are now rearranged so that they are in numerical order by year</td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>Click the Year column heading a second time to switch between ascending and descending order</td>
</tr>
<tr>
<td><strong>Step 3</strong></td>
<td>Sort the references in alphabetical Title order by clicking the Title column heading Notice that (articles) small words such as “the” are ignored for sorting purposes</td>
</tr>
</tbody>
</table>
### Task 8
Use the Sort dialog to re-order the references so that:
- All the same reference type are together, and
- within a reference type group, they are in descending year order, and
- those from the same year are shown in ascending order of author

**Step 1**
Use Tools|Sort Library to display the Sort Options dialog

**Step 2**
Select Reference Type in the first drop-down

**Step 3**
Select Year in the second drop-down and click the sort order button until it looks like this:

**Step 4**
Select Author in the third drop-down

**Step 5**
Make further sorting selections if you wish
Set a sorting language if you wish

**Step 6**
Click OK

Inspect the library list to see how your sort has worked

### Task 9
Leave the Paleo2 library open for later exercises

### Exercise 8  Searching within the library
- Use the Quick Search control
- Search to match text or numbers
- Show all references again
- Search for a number range
- Search for multiple criteria

### Task 1
Continue work in the Paleo2 library, with the library list displayed

### Task 2
Use the Quick Search box to find all references containing 1986

**Step 1**
Ensure that you have All References showing

**Step 2**
Find the Quick Search box in the toolbar:

Type 1986

**Step 3**
When you press ENTER, EndNote shows only the references from the Paleo2 library that include 1986

Notice that these references found were not all written in the year 1986 - examine their detailed contents to discover why they were included in this Search Results
### Task 3
Search for all works dated in 2012

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Ensure that you have All References of the Paleo2 library list showing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2</td>
<td>Display the Search panel</td>
</tr>
<tr>
<td></td>
<td>If it is hidden, use ![Show Search Panel] or ![Show Search Panel]</td>
</tr>
<tr>
<td>Step 3</td>
<td>In the Search panel, complete the first row:</td>
</tr>
<tr>
<td></td>
<td>select <strong>Year</strong> in the first box</td>
</tr>
<tr>
<td></td>
<td>select <strong>Contains</strong> in the second box</td>
</tr>
<tr>
<td></td>
<td>and type <strong>2012</strong> in the third</td>
</tr>
<tr>
<td>Step 4</td>
<td>Ensure that there are no other search criteria set</td>
</tr>
<tr>
<td></td>
<td>Click ![Search]</td>
</tr>
<tr>
<td>Step 5</td>
<td>Those references which match your search criteria are now displayed (the Search Results group)</td>
</tr>
<tr>
<td></td>
<td>Check that the status message in the bottom left corner says something like <strong>Showing 31 of 31 references in Group</strong></td>
</tr>
</tbody>
</table>

### Task 4
Show all the references in the library:

| Click All References in the Groups panel (or use the useful keystroke CTRL+M in Windows or SHIFT+CMD+M with a Mac) |

### Task 5
Run a search to show only works dated 2012 or later

<table>
<thead>
<tr>
<th>Tip: use “<strong>Greater than or equal to</strong>”</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Step 1</th>
<th>In the Search panel, clear any previous criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2</td>
<td>Choose <strong>Year</strong> in the field box</td>
</tr>
<tr>
<td></td>
<td>Choose <strong>Is greater than or equal to</strong> in the next box</td>
</tr>
<tr>
<td></td>
<td>Type <strong>2012</strong> in the third box</td>
</tr>
<tr>
<td>Step 3</td>
<td>Click ![Search]</td>
</tr>
<tr>
<td></td>
<td>Confirm that there are about 51 references showing, all with Years from 2012 onwards</td>
</tr>
</tbody>
</table>

### Task 6
Display all works with paleontology (note the spelling) and fossil among their keywords

<table>
<thead>
<tr>
<th>Show all references</th>
</tr>
</thead>
</table>

| Step 2 | Display the Search panel and clear old entries |
|        | Choose **Keywords** in the Field box, then **Contains** and type **paleontology** in the text box (note the spelling) |
| **Step 3** | In the second row, choose **Keywords** in the Field box and type **fossil** in the text box |
| **Step 4** | Ensure that both rows use the **Contains** operator  
Ensure that **AND** is shown at the start of the second row |
| **Step 5** | Click and confirm that there are about 4 references found |

**Task 7**  
Try some more searches; remember to **Show All References** after each search  
Finally, display all references

### Exercise 9  Working with custom groups
- Create some custom groups  
- Drag an item into a custom group  
- Send the results of a search into a group  
- Delete an item from a custom group  
- Display the members of each group  
- Discover which group a given record belongs to

### Task 1
Continue work in the **Paleo2** library, with the full library list displayed  
Display the Groups panel, using **Layout** or **

### Task 2
Create a custom group for **Bacteria**

| **Step 1** | Choose **Groups|Create Group**  
A new group is created among the Custom Groups |
| **Step 2** | Type the title **Bacteria** |

### Task 3
Create a custom group for **Mammals**

| **Step 1** | Choose **Groups|Create Group** |
| **Step 2** | Type the title **Mammals** |
### Task 4
Add these references to the **Mammals** group:
- Bethune, 2001
- Bowstein, 2011

**Step 1**
Ensure that you are displaying all references
Identify the paper by *Bethune* in 2001

**Step 2**
Drag this paper onto the group name **Mammals**

**Step 3**
Find the paper by *Bowstein* in 2011, and drag it into the same group

**Step 4**
Add the item by *Chang* (2012) to the **Bacteria** group

### Task 5
Search the whole library for references that mention *sediments* in any field [approx. 3]

**Step 1**
Ensure that you are viewing all references

**Step 2**
In the Quick Search box, type *sediments*

**Step 3**
Press ENTER
This should find about 3 references

### Task 6
Add all the references found by that search to the **Bacteria** group

**Step 1**
Select all the references found (click on the first one, hold SHIFT and click on the last one)

**Step 2**
Choose **Groups|Add References To|Bacteria**

**Step 3**
Display the **Bacteria** group
Confirm that the 3 found references have joined this group

### Task 7
With *Butler, 2010* selected, choose **References|Record Summary** to discover which groups this record belongs to

### Task 8
Delete *Butler, 2010* from the **Bacteria** group (note the alert message)

**Step 1**
Select the paper by *Butler* in 2010

**Step 2**
Press DELETE

Choose **Groups|Remove References from Group**

Read the alert message carefully, then agree to delete
Task 9
Practice displaying the contents of various groups, by clicking the group names in the Groups pane

<table>
<thead>
<tr>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Click the Mammals group name to display its contents</td>
</tr>
<tr>
<td>Click the Bacteria group name to display its contents</td>
</tr>
<tr>
<td>Click All References to display the full library</td>
</tr>
</tbody>
</table>

Task 10
Finally, display all references

Exercise 10  Creating smart groups
- Create a smart group by defining search criteria
- Display the smart group’s contents
- Create a smart group by searching

Task 1
Use the Groups menu to create a smart group called Early work, which finds all items from years 2008 or earlier

<table>
<thead>
<tr>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose Groups</td>
</tr>
</tbody>
</table>

Step 2
In the Smart Group dialog, choose or type:
- Early work as the Group Name
- Year in the first logic box
- Less than or equal to in the second box
- 2008 in the third box

Clear any other criteria

Step 3
Click **Create**

Notice the different icon of the smart group

Task 2
Inspect the references in the new smart group

<table>
<thead>
<tr>
<th>Step 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>The items in the smart group are displayed – if necessary, click on Early work in the Groups pane</td>
</tr>
<tr>
<td>Confirm that the references shown are all from the years 2008 and earlier</td>
</tr>
<tr>
<td>Task 3</td>
</tr>
<tr>
<td>--------</td>
</tr>
</tbody>
</table>
| Use the Search panel to set up a search which finds all items from the Geophysical Research Letters which mention *strato* in the title [approx. 9 references] | Display all references  
Display the Search panel (if necessary) and clear any previous settings |

<table>
<thead>
<tr>
<th>Step 2</th>
</tr>
</thead>
</table>
| Set up a new search of all the references, for items from the journal “Geophysical Research Letters” which contain “strato” in the title  
You should find about 9 references |

<table>
<thead>
<tr>
<th>Task 4</th>
<th>Step 1</th>
</tr>
</thead>
</table>
| Use [Options…] to convert the search into a smart group  
Name the new smart group *strato in GRL* | Still with the search criteria showing in the Search panel, click [Options…] or [ ] |

<table>
<thead>
<tr>
<th>Step 2</th>
</tr>
</thead>
</table>
| Choose Convert to Smart Group  
A new smart group is listed in the Groups pane |

<table>
<thead>
<tr>
<th>Step 3</th>
</tr>
</thead>
</table>
| Give the new smart group a suitable name such as *strato in GRL*  
Notice that the new smart group also has 9 references |

### Exercise 11 Working with smart groups
- Add a reference to the library, which adds to the smart group  
- Compare a smart group with a custom group

<table>
<thead>
<tr>
<th>Task 1</th>
<th>Step 1</th>
</tr>
</thead>
</table>
| Use the smart groups which you created in the previous exercise | Confirm that you have these smart groups, from the previous exercise:  
**Early work**  
**strato in GRL** |
### Task 2
Create a new journal article reference:

**Author:** W. H. Miller  
**Year:** 2007  
**Title:** Progress in cloud repair  
**Journal:** Geophysical Research Letters

#### Step 1
Click ✚ to create a new reference

#### Step 2
Confirm that it is a journal article

#### Step 3
In the **Author** field, type **Miller, W. H.**

#### Step 4
Use TAB or click to move to the **Year** field, and type 2007  
In the **Title** field, type Progress in cloud repair

#### Step 5
In the **Journal** field, type Geophysical Research Letters  
Complete other fields if you wish

#### Step 6
Close the reference, without closing the EndNote library, by clicking the lower ✗ or ✖️

### Task 3
Explore whether the new reference has become a member of either smart group

#### Step 1
In the Groups panel, click **Early work** to display its contents: the Miller reference should have appeared here

#### Step 2
Click the strato in GRL group, to display its contents: the Miller reference should not have appeared here (although it is found in Geophysical Research Letters, it does not have strato in the title)

#### Step 3
Click **All References**: the Miller reference should appear here, of course

### Task 4
Try dragging this reference into a custom group  
Also try dragging it into a smart group  
Why do these groups behave differently?

#### Step 1
In the **All References** group, select the Miller reference

#### Step 2
Drag it into the **bacteria** custom group that you created in an earlier exercise: this should succeed

#### Step 3
Try to drag the Miller reference into a smart group: this should not succeed  
Think about why it is never possible to drag a reference into a smart group
**Exercise 12  Combining Groups (Optional)**

- Create a combination group using **AND**
- Create a combination group using **OR**
- Create a group set

<table>
<thead>
<tr>
<th>Task 1</th>
<th>Create a smart group which displays all items from the journal “Nature”</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Clear the Search pane</td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>Set up a new search for <strong>Nature</strong> contained in the journal title</td>
</tr>
<tr>
<td><strong>Step 3</strong></td>
<td>Convert the search into a smart group, called <strong>Nature Magazine</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 2</th>
<th>Create a combination group which shows items in Apollo magazine that are in the <strong>Bacteria</strong> group</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Display all references</td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>Choose **Groups</td>
</tr>
<tr>
<td><strong>Step 3</strong></td>
<td>In the <strong>Create From Groups</strong> dialog, choose the <strong>Bacteria</strong> group (a custom group which you created earlier) and the <strong>Nature Magazine</strong> group (a smart group)</td>
</tr>
<tr>
<td><strong>Step 4</strong></td>
<td>Link them with <strong>AND</strong></td>
</tr>
<tr>
<td></td>
<td>Click <strong>Create</strong> to create the new group</td>
</tr>
<tr>
<td><strong>Step 5</strong></td>
<td>Name the new group <strong>Bacteria in Nature</strong></td>
</tr>
</tbody>
</table>

| Task 3 | Experiment with creating some further combination groups, using logical **OR** and **NOT** as well as **AND** |
**Task 4**  
Create a group set to keep together all the groups you have made today

**Step 1**  
Choose Groups\Create Group Set  
A new Group Set appears in the Groups panel

**Step 2**  
Immediately give the new set a name: Current investigations, then press ENTER

**Step 3**  
Drag the groups Mammals, Early Work and strat in GRL into the Current investigations set

**Task 5**  
Rearrange the order of the group sets by dragging them up and down the Groups panel, into any order that you prefer

---

**Exercise 13  Citing a reference in a Word document**

- Insert a citation in a Word document, taken from the EndNote library
- Insert a citation in a Word document, using the Find Citation tool

**Task 1**  
Start Word

[Windows] If you are using Windows in one of our teaching rooms, you can start Word from the Start menu  
You will find Word among the Microsoft Office group

[Mac] You may find a Word icon in the Dock  
If you are using a Mac in one of our teaching rooms, you can start Word by using the Finder: you will find Word in the Applications folder, among the Microsoft Office group

**Task 2**  
Open the Word document Advances in Paleontology.docx  
Also keep EndNote open with the Paleo2 library

**Step 1**  
In Word choose File|Open

**Step 2**  
Browse to Drive H  
(or elsewhere if instructed by your teacher)

**Step 3**  
Find the document called Advances in Paleontology.docx and open it

**Step 4**  
Keep EndNote open, showing the Paleo2 library

**Task 3**  
Notice the EndNote tab or toolbar which appears in Word  
(ask your teacher or demonstrator if you are not sure)
### Task 4
Insert a citation to the work by Tacitus of 2012, at a suitable point on page 1 – use or in EndNote

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Place the insertion point after Earth’s history at the end of the Introduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2</td>
<td>Switch to EndNote, by using the Taskbar/Dock or by pressing ALT+TAB or CMD+TAB Select the work by Tacitus of 2012</td>
</tr>
<tr>
<td>Step 3</td>
<td>In EndNote for Windows click near the centre of the toolbar In EndNote for Mac click at top right This creates a citation of the selected work</td>
</tr>
<tr>
<td>Step 4</td>
<td>Switch back to Word Note: the appearance of the citation can be adjusted later - we will leave it in the default format for now</td>
</tr>
</tbody>
</table>

### Task 5
Use or in Word, to insert a citation to Billoski’s book of 2012 at a suitable point on page 1

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Click after water in the first line of the Introduction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2</td>
<td>Click or (on the EndNote tab or toolbar in Word) If a menu appears, choose Find Citation</td>
</tr>
<tr>
<td>Step 3</td>
<td>In the Search box, type Billoski and click Find A list of references from the open library is presented, which match your search text</td>
</tr>
<tr>
<td>Step 4</td>
<td>Select his book of 2012 and click Insert A citation is inserted into your document at the insertion point</td>
</tr>
</tbody>
</table>

### Task 6
Insert a citation to Hill, 2005 at a suitable point on page 2

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Place the insertion at a suitable point on page 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2</td>
<td>Type the citation within braces: {Hill, 2012}</td>
</tr>
<tr>
<td>Step 3</td>
<td>In due course, EndNote will match this with the reference in the library, and will format the citation Check back later, at this point in the document</td>
</tr>
</tbody>
</table>
Task 7
Save the Word document and leave it open
Leave the EndNote library open for later exercises

Exercise 14  Citations in footnotes - Optional
- Create a footnote using Word's footnote tool
- Insert a citation in the footnote
- Do some more, for practice
- Change the footnote numbering scheme

Task 1
Continue work in the Word document Advances in Paleontology.docx

Task 2
Create a footnote in the Resources paragraph

Step 1
Place the insertion point after T F Flannery in the Resources paragraph

Step 2
On the References tab of the ribbon, click
Choose Insert|Footnote

Task 3
Insert a citation in the footnote - cite Bethune, 2001

Step 1
Notice that a small index number has been inserted among at the text at the point you marked, and a matching one now appears at the bottom of the page

Step 2
With the insertion point in the footnote at the bottom of the page, insert an EndNote citation to Bethune, 2001

Step 3
The detailed appearance of the citation in the footnote depends on the output style you have applied to this document (retain the default for now; more on this later)

Task 4
Insert some more footnote citations, for practice, in this document

Task 5
If necessary, adjust the footnote numbering using Word's own commands

Step 1
If the footnotes are not numbered suitably, this can be changed using Word's own commands

Step 2
Click the launcher in the corner of the Footnotes group on the ribbon
Choose Insert|Footnote
Referencing: Up & running with EndNote

Step 3
In the Footnote dialog, choose a different numbering scheme, such as a, b, c instead of 1, 2, 3

Step 4
After making these changes in the Footnote dialog, take care to click Apply (to apply your changes to the existing footnotes) rather than Insert (which would insert a further footnote)

Task 6
Save the document, and leave it open for later exercises

Exercise 15  Working with citations
- Insert multiple citations
- Citation report in EndNote
- Effect of editing a reference

Task 1
Continue work in the Word document Advances in Paleontology.docx (or open Further Advances in Paleontology with Citations.docx which is provided)

Task 2
Insert a double citation into the document, by selecting two citations in the library list

Step 1
Click after earthquakes in the Introduction

Step 2
In EndNote, select Archaeos, 2013 and also Bremand, 2010 by holding CTRL or CMD while clicking

Step 3
Still in EndNote, use or to insert a double citation
Look at the document to see what the double citation looks like

Task 3
In EndNote, look at the citation report group that is building up for this document - it lists the references that have been cited in this document
## Task 4
In *EndNote*, edit the reference to a citation you have previously inserted, changing the year.
This will update automatically in the document.

### Step 1
In *EndNote*, edit the Archaeos, 2013 reference.
Change the year from **2013** to **2010**.

### Step 2
After a while, the citation in the document will update automatically, both the citation in the text and the bibliography entry.

### Step 3
In *Word*, you can force the citation to update:
- Click ![Update Citations and Bibliography](image.png)

## Task 5
Save the *Word* document and leave it open.
Leave the *EndNote* library open for later exercises.

## Exercise 16 Bibliography
- *Find the bibliography which has been assembled automatically*
- *This has a standard layout and format (to be revised later)*
- *Add some more citations*
- *See they have been added to the bibliography*

## Task 1
Continue work in the *Word* document *Advances in Paleontology.docx* (or open *Further Advances in Paleontology with Citations.docx* which is provided for you).
Ensure that the *Paleo2* library is also still open.

## Task 2
Examine the bibliography which appears at the end of the document.

### Step 1
Scroll to the end of the document, after the **Conclusions** paragraph.

### Step 2
The bibliography has been assembled here.
It lists all the references that you cited in the main document, with more details.

### Step 3
If no bibliography has been created, ask for assistance with selecting a suitable output style.
*Note*: the appearance of the bibliography and the layout of the individual items will be revised later.
### Task 3
Add some more citations among the main text

### Step 1
Place the insertion point among the text on page 2
Insert a citation to a reference in your EndNote library

### Step 2
Move to other positions in the text and insert some more citations

### Step 3
The bibliography will update shortly
You can force the bibliography to update:

- Click [Update Citations and Bibliography](#)
- Click [](#)

### Task 4
The new citations will appear in the bibliography
Save the document, leaving it open for later exercises

### Exercise 17  Changing the output style
- Apply a different style
- Observe its effect on citations and bibliography
- Browse the list of styles available with EndNote
- Apply another style and observe its effect
- Use the Style Preview in EndNote to preview styles

### Task 1
Continue work in the Word document *Advances in Paleontology.docx*
(or open *Further Advances in Paleontology with Citations.docx* which has citations provided)
### Task 2
Use the Style control in Word and apply the Annotated style
Examine its effect on the in-text citations and on the bibliography; also on any citations in footnotes

#### Step 1
Click the **Style** control on the **EndNote** tab of the ribbon (Word for Windows) or on the **EndNote** toolbar (Word for Mac)
Choose the style **Annotated**
This changes the output style applied to the current document

#### Step 2
In the Word document, look at the citations you included in the main text, and also at the bibliography
The new style has changed the fields included and their order, as well as the formatting and punctuation

### Task 3
View the list of other styles available
Apply Vancouver and examine its effects

#### Step 1
Use the Style control on the ribbon or toolbar
Choose **Select Another Style** to see a list of available output styles

#### Step 2
A list appears, with 500+ available styles
Scroll through the list, noting any that are relevant to your own field of work

#### Step 3
Find **Vancouver** (which is popular in medical and science circles) and click **OK**

#### Step 4
The style is applied to the whole document, changing the in-text citations and bibliography
### Task 4
In *EndNote*, use the Style Preview to consider various styles.

Choose a style and apply it to the document.

### Step 1
Switch to *EndNote*.

### Step 2
Click the Styles box on the toolbar.

Choose **Select Another Style**.

### Step 3
Click **More Info** to extend the dialog.

Use **Style Info/Preview** to display the Style Preview.

### Step 4
Click various styles in this dialog’s list, and notice the previews provided.

### Step 5
Choose a style which appeals to you.

Use the method of Task 3 to apply this style to the open *Word* document.

### Task 5
Close the document, saving if you wish.

Close *EndNote* – the library has been saved.
Referencing: EndNote Up and running

Pamela Stanworth
pamela.stanworth@it.ox.ac.uk

Today’s arrangements

Your teacher is:
Your demonstrator:
We finish at: 12:15

Your safety and comfort are important

Where is the fire exit?
Please tell us if anything doesn’t work
The toilets are along the corridor outside the teaching rooms
The rest area has vending machines and a water cooler

Resources for your learning

Activities for you to practice today
Work at your own pace!
Be selective

Video playlists with today’s topics in Lynda.com

Follow-up work
Continue with exercises after the session
Bookable Course Clinics

Course topics

Overview: working with EndNote
A library of references
Connecting to on-line resources
Downloading references
Editing reference details
Working with a library
Sorting and searching
Grouping references

Citing references in a Word document
Citations in footnotes
Formatting citations
Output styles
Bibliography

Overview

IT Learning Centre

IT Learning Centre
**EndNote library of references**

**Getting started with EndNote**

EndNote version X7
in IT teaching rooms
Start EndNote
Use the Start menu, Finder Applications etc.

**Creating a new library**

New library
Choose a location
Assign a useful filename
Remember: back up library files frequently

**Searching Online**
EndNote can search sources online

Tools | Online Search or

Choose a database in the Groups panel, or click more...

Set up criteria

Search results are imported immediately into library

Check and delete any unwanted references

Choosing an online resource?

For your field of work...
Ask your librarian

Specialist subject librarian, colleagues, academic supervisor, OxLIP+

Resources vary in...
Coverage, accuracy, completeness and fields provided

EndNote connections

Hundreds of libraries are available on-line
(click more...)

Some require a username and password
Check your own entitlement with your librarian
Pre-configured on some University computers

For more, ask for a connection file
Ask librarian, OLIS website, your dept website,
EndNote’s website, remote library’s website

Some Oxford connection files can be downloaded from
ITLP Portfolio http://portfolio.it.ox.ac.uk

Up and running with EndNote
Up and running with EndNote

Exercises: 1 - 3

Demonstrators:

Restart at 10:05 am please

If you want to continue with the Exercises, you could …

Copy the Exercise files to a memory stick

Download the files (and more) from the ITLC Portfolio at http://portfolio.it.ox.ac.uk

Check and edit a reference

Edit in the Reference panel
Or double-click to open a separate window

Working on a reference

More details

Complete as many fields as possible

Titles - enter in consistent case
(EndNote may capitalise later, in citations)

Dates - be consistent

Research Notes for your notes (up to 8 pages of text)

Web address - URL or DOI, creates a clickable link

My Rating stars
Read/unread status
... and lots more

Author names

Use the form Surname, Firstname
One author per line, using <Enter>
An organisation: put a comma after

Bloggs, Joseph
Dean, Jane P
de Havilland, O
Llewellyn Bowen, L
The British Museum,
Adding a new reference

New reference

Choose a reference type
  e.g. Journal article or Book
Type details for each field
Use <Tab> and <Enter> keys

The data is saved as you close

Updating reference details

Find Reference Updates
Seeks updates for all selected references
Choose carefully

Working with a library

Viewing the library of references

Arrange the panels
  Reference list, Groups, reference, preview
  (PDFs if attached)

Sorting
  Click a column heading or
  Tools|Sort Library for multi-level sort
  “The” etc. ignored at start of value

Adjust column widths
Delete a reference

Searching through the library

Quick Search - finds in any field

Grouping references
Working with Groups

Custom groups - you choose the members

Create groups with useful names
Drag references into suitable groups
A reference can belong to several groups
Deleting an item from a group does not delete it from the library

Smart groups are self-populating

Create a new smart group: define its criteria
Or run a search, then send results to a smart group
New items added to the library are automatically included in relevant smart groups

Combining Groups (Optional)

Create from groups using logic: AND/OR/NOT
Use group sets as containers to manage the groups

Up and running with EndNote

Exercises: 4 - 12

Restart at 11:15 am please
Citing references in a document

Inserting a citation in a document “Cite While You Write”

Click the position in the *Word* document
Select reference/s in *EndNote* and
Or use Find Citation in *Word*
Citation appears among the text

Multiple citations ;

Citations in footnotes

Inserting...
Create a *Word* footnote
Then insert an *EndNote* citation

*Word* takes care of the numbering

Working with citations in a document

Removing a citation
Select the whole citation including any brackets

Updating citations
Citation updates automatically if reference is edited
Force update using [Update Citations and Bibliography]

References cited
Several documents may be open
In *EndNote*, a citation report for each document

Bibliography in the document

A list of the references cited
*EndNote* builds it at the end of the document
Usually fuller details than in-text citation
The format and fields included depend on the output style

Bibliography is updated when you add a citation

Using *EndNote* With *Word*

*EndNote* is an Add-In for *Word*
Commands are woven into *Word* - an extra tab on the Ribbon or an extra toolbar
Citations are inserted directly
And formatted automatically
Formatting citations in a document

Output styles

- Controls the way reference details are presented
  - e.g. Author-date, MLA, Numbered etc.
- Which fields, punctuation, text formatting?
- Affects citations, bibliography and footnotes

- Apply an output style in each document
- Re-style the citations to suit each publication

Choosing an output style

- Range of publication reference styles already available
- Browse the list in the Styles dialog
- Preview to find a suitable style
  - In EndNote’s Style selection box choose Select Another
  - Shows a sample journal, a book and a book section
- Download 100’s more from EndNote’s Style Finder online
- Or create your own output style (later course)

Formatting citations in footnotes

- How does the citation appear?
  - Either the full reference or an abbreviated form
  - Depends on output style chosen
- Repeated citations in footnotes
  - If citing the same reference in a later footnote, may use a short form of the title
  - If citing the same reference in consecutive footnotes, may use “Scott, Ibid”
  - Depends on the output style chosen

More about EndNote

Obtaining EndNote software

- Oxford University campus licence for EndNote
  - ask your department
  - or get your personal copy from IT Services Online Shop
  - or from Adept or Bilaney Consultants
- Websites for more information
  - www.endnote.com/
  - www.bodleian.ox.ac.uk/bdiss/resources/endnote
  - www.adepscience.co.uk/
  - www.bilaney-consultants.co.uk/our-products/endnote.html
- Other citation software is available
  - e.g. RefWorks, EndNote Online
Other reference management courses

Referencing: EndNote Building your library

Referencing: EndNote Citations and bibliographies

... using Windows or Mac

Word-processing courses

Documents: Academic writing
Good Practice with Formal Documents

Documents: Academic writing
Managing Your Thesis
Building Long Documents

If you want to continue with the Exercises, you could ...

Copy the Exercise files to a memory stick

Download the files (and more) from the ITLC Portfolio at http://portfolio.it.ox.ac.uk

Up and running with EndNote

Exercises: 13 onwards

Finish at 12:15 please

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