Referencing: EndNote
Quick start

iT Centre Learning

iT services

UNIVERSITY OF OXFORD

The small print

Prerequisites

Time in the workshop is precious – it is an opportunity for you to interact with the workshop leader and other participants through questions and discussions and to share your experiences and concerns. To make the most of this time we sometimes ask you to carry out learning activities ahead of the workshop so that everyone comes into the class with the same basic knowledge. We keep this prior learning to a minimum and often make use of online videos.

Your course booking will tell you if any prior learning activity is required. If you arrive for a workshop without having done the prior learning, the workshop leader may suggest that you come back on another session.

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About the workshop designer

Pamela Stanworth has over a decade's experience working on formal documents, theses and reports with researchers and departments across the University. She brings a pragmatic approach to managing research reading and building documents that are effective, reliable and sustainable.

Pamela's roots are in engineering, working with blue-chip industrial companies, technical consultancy and small businesses. Her commitment in teaching and consulting is to enable people to use appropriate technology in their work, efficiently and to a high standard.

Revision history

Version	Date	Author	Comments
1.0	March 2017	Pamela Stanworth	Created
1.1	February 2018	Pamela Stanworth	Revised web search activity
1.2	April 2019	Pamela Stanworth	Revised web search activity
2.0	May 2020	Pamela Stanworth	Reformatted for online workshop EndNote ver X9.3
3.0	January 2020	Pamela Stanworth	EndNote 20
3.1	November 2020	Pamela Stanworth	re-formatted
3.2	Sept 2023	Pamela Stanworth	Updated for EN 21

About this workshop

This workshop is a first look at *EndNote* - a tool for storing and managing references and creating bibliographies.

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 covers time-saving techniques and automations, and provides tasks for hands-on practice.

We will discuss how to create a library to manage your references and research reading. You need a range of tools for searching online and downloading references.

We work through ways of inserting dynamic references from your library into a word-processed document, both in line with the text and in footnotes. We will explore how *EndNote* helps with formatting the citations and building a bibliography, and try out the wide variety of output styles.

We will include pointers to other workshops and further resources that will help you go on later to manage your research reading and to achieve more advanced citation and bibliography formatting.

What you need to know

The ideas and techniques covered in this workshop will apply to a range of tools. We will demonstrate using *EndNote*, which is widely used. However, the concepts will be the same or similar, whichever reference manager app you decide to use.

I will not assume that you have any experience with a reference manager. With your chosen computer, you will need to be able to:

- Find, start and quit various software apps
- Navigate the commands and menus in an app, using Help as necessary
- Search online for references
- Navigate around a word-processed document

If you need to review these activities, there are some great videos at the EndNote channel in YouTube. There is an activity pointing to relevant videos in the IT Learning Portfolio: visit skills.it.ox.ac.uk/it-learning-portfolio and search for “EndNote Quick Start activity”.

The resources you need

Sample documents that you can use to experiment with will be available, but you may like to bring along your own.

The resources for most workshops, including any pre-course activity, are in the IT Learning Portfolio: visit skills.it.ox.ac.uk/it-learning-portfolio and search for “EndNote Quick Start”.

Unless you have been told otherwise, in classroom workshops there will be a computer available for you to use, with *EndNote* and *Word* installed.

You can use your own computer with your preferred app installed if you want to – just bear in mind that I am not an expert in every app (although I am sure that between us we will be able to sort out most problems!).

Note about Software and Versions

The current version of *EndNote* is *EndNote 21*, which is available for *Windows* and for *MacOS*. Collect your software and licence from IT Services website **www.it.ox.ac.uk** (free of charge for University of Oxford members). There will not be time during the workshop for you to download and install software, so you need to do this before attending.

If you are already committed to using an earlier version of *EndNote* such as *EndNote X9*, most of what we cover in this workshop will be sufficiently similar. However some procedures are notably different between *EndNote 20* and earlier versions. We will point these out where relevant during the workshop.

Learning Objectives

This workshop has the following learning objectives:

Learning Objective One – Creating a new library

Learning Objective Two – VPN

Learning Objective Three – Collecting references using *EndNote's* built-in search tool

Learning Objective Four – Find a bibliographic database website

Learning Objective Five – Online search and direct export

Learning Objective Six – Working with reference details

Learning Objective Seven – Inserting citations in a *Word* document

Learning Objective Eight – Working with citations

Learning Objective Nine – Bibliography in a *Word* document

Learning Objective Ten – Output styles in a *Word* document

Learning Objective One – Creating a new library

A library is your database for collecting references. Start *EndNote* - if an existing library or a message about an “unexpected library” appears, close or cancel that.

Create a new library, naming it **Dinosaurs** or using your own name. Or if a new library appears automatically, save a copy named **Dinosaurs**. Save the library on a convenient local drive, such as on your Desktop; if you are in our teaching room, save the library in the **Documents** folder provided.

When, later, you create your own library for real work, think about a suitable location – where will you save it? What will be your strategy for making frequent backup copies of your library?

Learning Objective Two – VPN

Some online services are restricted to authorised users such as members of the University of Oxford, or they provide a better search experience for members. *VPN* is an app for proving your status as a member of the University. Unless your computer is plugged in by ethernet cable to the network in a University building, you should run *VPN* each session before searching.

Read more about *VPN* and download your copy, in the IT Services website. There is not time during the workshop to install and set up VPN. The exercises described here have been designed to work successfully even if working without VPN.

Learning Objective Three – Collecting references using *EndNote*'s built-in search tool

1. Use the black left-hand panel in *EndNote* to connect to the Library of Congress or Jisc Library Hub. If necessary, choose **Tools/Online Search** to see a full list of connections. Search for items with **`dinosaur bones`** in the title.

   Relevant references are listed temporarily on your screen. Review the list and tick about 8 references which look interesting. Add them to your library using ⊕ at top right.

Notice that all the references you have added are accumulating permanently in the **All References** group.

Learning Objective Four – Find a bibliographic database website

Start *Chrome* or your preferred web browser.

> **Note on web browser apps**: Some database websites do not work well with *Safari*, and some do not work well using *Internet Explorer*. If downloading does not seem to work well for you, try using another web browser such as *Chrome*. Some websites, notably *Proquest,* use pop-ups for the exporting process, so make sure your browser is allowing this.

Have you checked the advice about settings and VPN in Learning Objective Two?

Use *File Explorer* or *Finder* to look at the set of sample files provided for this workshop, and find the list of the browser links (numbered A-D).

Arrange the files window and the web browser window side by side on your screen. You can open one of the suggested websites by dragging its shortcut from the files window and dropping it into a new tab in your browser.

Learning Objective Five – Online search and direct export

Each bibliographic website has its own layout, so you are going to try out some websites that interest you, and collect a few references from each website in your *EndNote* library.

Try a couple of these searches:

Web of Knowledge	papers with **Jurassic dinosaur** in the **title**, published in the **year to date** This may require your Oxford single sign-on
SOLO advanced search	papers created in **2022**, with **late renaissance** in the **title** when asked, choose Encoding UTF-8
PubMed	articles **this year** with **common cold** in the **title** if asked, choose the PubMed import filter
ProQuest UK	inspect dissertations & theses submitted in your area of interest browser must have pop-ups enabled

Tips for importing references:

Collect a few references in the Folder/Favourites/Trolley/etc

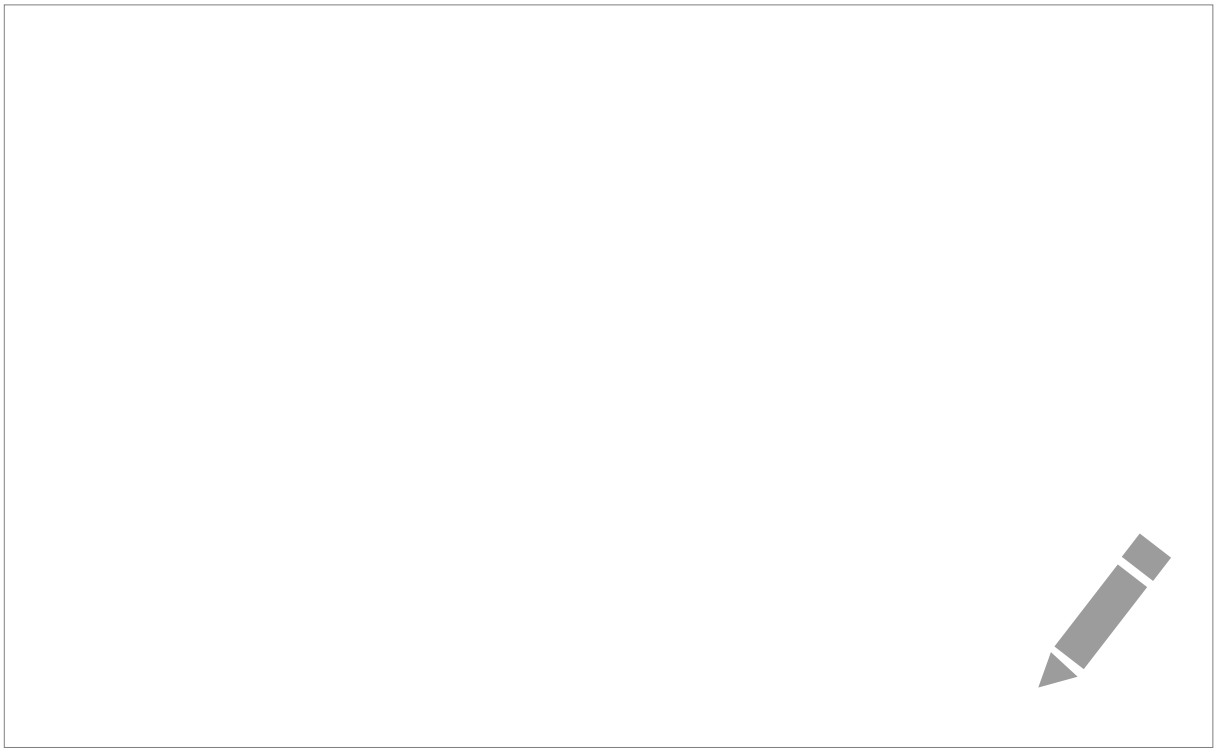
Use a command similar to **Export/Import/Send/Download/Save**

If asked, use a format such as **RIS/Direct Export/Citation Manager**

Don't choose **EndNote Online**!

If asked, choose to **Open**, or **Open with...Export Helper**, or **Open with...Choose...EndNote**

After each search, examine the references that have arrived in your *EndNote* library, editing or deleting some as needed. They all accumulate in the **All References** group.



Learning Objective Six – Working with reference details

Close any open *EndNote* library, then open **paleo2.enl**.

1. Edit the **Alvarez** reference using the **Edit** panel – correct the author's name to **`Alvarrez`**. Examine the other fields available and think about how you would use them as you organise your own reading.
   After editing a reference, click on any other reference to prompt *EndNote* to save the edits.
2. Find the **Chang** reference and make further edits, such as adding another author **`Rex Fairbrother`**. Add your own remark about this article, in the **Research Notes** field.

   Notice that this is a newspaper article: look through the list of other reference types available.
3. Add a new reference manually: a book by Harrison Burns, "**`A practical approach to field studies`**", 2013.

Learning Objective Seven – Inserting citations in a *Word* document

Open the *Word* document **Advances in Paleontology.docx**.

Insert a citation to the work by **Tacitus** of **2012**, at a suitable point among the text on page 1.

Use a different method to insert a citation to **Billoski's** book of 2012 at another suitable point.

(*Optional where relevant*) Create a footnote, then insert a citation in the footnote - cite **Bethune**, **2001**. You might prefer to use the document **Further Advances in Paleontology with Footnotes.docx**, as it already has some footnotes.

Learning Objective Eight – Working with citations

At a suitable point on page 2, create a multiple citation by inserting 2 citations together. Notice the way *EndNote* manages the punctuation.

Identify one of those references in the *EndNote* library, and edit it there, changing the spelling of the author. In the *Word* document, update the citation and notice the spelling has been revised.

In *EndNote*, review the list of the references cited in this document. This list will be updated automatically as you add and remove citations in the document.

Learning Objective Nine – Bibliography in a *Word* document

Examine the bibliography which appears at the end of the *Word* document.

Add some more citations among the main text. Notice the way the bibliography changes.

Learning Objective Ten – Output styles in a *Word* document

Find the Style control on the **EndNote** tab of *Word's* ribbon. Use this to find out what output style is currently applied to the document. The output style governs the format of citations, footnote citations and bibliography, throughout the document.

Use the Style control to apply the **Author-Date** or **Harvard** style, and notice the differences in the document.

View the list of other styles available. Apply **Vancouver** and examine its effects. Try some other styles, and think about which one/s you will use in your own writing.

Further information

Getting extra help

The IT Learning Centre offers bookable clinics where you can get pre- or post-course advice. Contact us using courses@it.ox.ac.uk.

Study Videos to support your learning

On our website, you will find our collection of self-service courses and resources. This includes providing LinkedIn Learning video-based courses free to all members of the University. Visit skills.it.ox.ac.uk/linkedin-learning and sign in with your Single Sign-On (SSO) credentials.

Some courses recommend pre- and/or post-course activities to support your learning. You can watch the online videos anywhere, anytime, and even download them onto a tablet or smartphone for off-line viewing.

About the IT Learning Portfolio online

Many of the resources used in the IT Learning Centre courses and workshops are made available as Open Educational Resources (OER) via our Portfolio website at skills.it.ox.ac.uk/it-learning-portfolio.

Find the pre-course activity for this course in the IT Learning Portfolio: visit skills.it.ox.ac.uk/it-learning-portfolio and search for “EndNote Quick Start”.

About the IT Learning Centre

The IT Learning Centre delivers a programme of digital skills courses, which are provided in our teaching rooms and online, and we give you access to thousands of on-line self-service courses through LinkedIn Learning.

Our team of teachers have backgrounds in academia, research, business and education and are supported by other experts from around the University and beyond.

Our courses are open to all members of the University at a small charge. Where resources allow, we can deliver private courses to departments and colleges, which can be more cost-effective than signing up individually. We can also customize courses to suit your needs.

Our fully equipped suite of teaching and training rooms are usually available for hire for your own events and courses.

For more information, contact us at courses@it.ox.ac.uk.

About IT Customer Services

The IT Learning Centre is part of the Customer Services Group. The group provides the main user support services for the department, assisting all staff and students within the University as well as retired staff and other users of University IT services. It supports all the services offered by IT Services plus general IT support queries from any user, working in collaboration with local IT support units.

The Customer Services Group also offers a data back-up service and is further responsible for desktop computing services – for staff and in public/shared areas – throughout UAS and the Bodleian Libraries.

Course Slides

The following pages contain images of the slides used in the presentation. The original PowerPoint presentation file can be downloaded from the same place where you obtained this course book.

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Referencing:
EndNote Quick start

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

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Resources for your learning

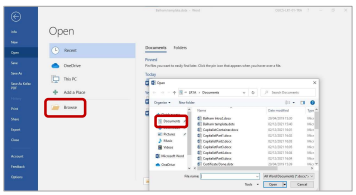
Activities for you to practice today
- In the coursebook
- Work at your own pace!
- Be selective

Videos with today's topics

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

4

Today, the exercise files are in the **Documents** folder



EndNote 21 and Word 2019 in teaching rooms

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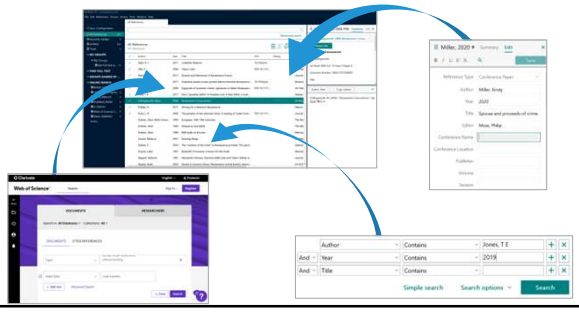
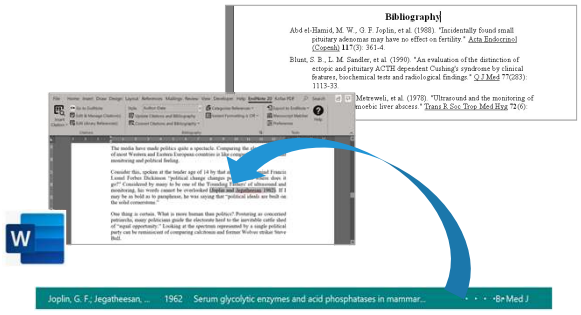
Build a library of references



7

Create text … insert citations



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Getting started

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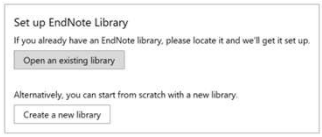
Creating a new library

Choose a location (local drive)
Assign a useful filename



10

VPN

If not connected to the University network, use *VPN* to get better search results
Sign in using Oxford SSO

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Method 1:
EndNote's online search

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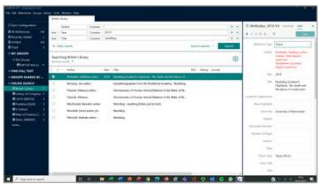
EndNote can search sources online

Choose a database in the **Groups** panel

or click **+** for more



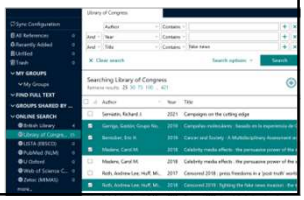
Set up criteria

VPN?

13

Importing the references found

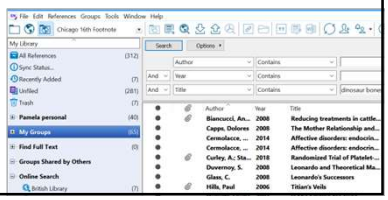
Search results display in a temp group
Tick the references you want
Add to your **All References**



14

Optional: EndNote X9 importing

Different procedure
Steps are given in Appendix



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EndNote Quick Start

Learning Objectives One, Two and Three

Resume at 10:05 please

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Find the resources for this workshop in our IT Learning Portfolio

Download the files
(and more) from the
IT Learning Portfolio at

skills.it.ox.ac.uk/it-learning-portfolio

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Method 2:
Collecting references online

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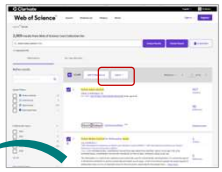
Directly exporting references

Visit individual websites & portals
- Every site is different
- Note some databases don't connect using *Safari* (try *FireFox*)

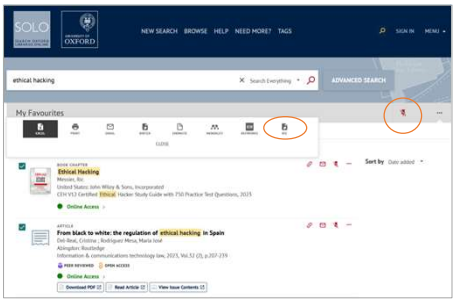


Use the site's own tools to search and export

References are sent directly into *EndNote*

20

SOLO can send directly to *EndNote*



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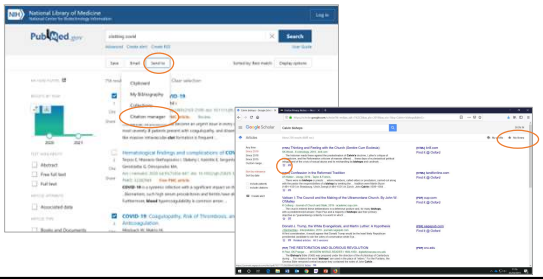
PubMed and Google Scholar can export to *EndNote*



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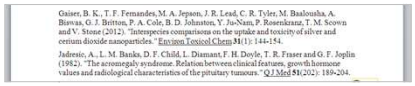
Got references in hand-typed text?

Re-acquire references from your usual database

Try Citation-Finder:
https://citation-finder.now.sh/


Gaiser, B. K., T. F. Fernandes, M. A. Jepson, J. R. Lead, C. R. Tyler, M. Baalousha, A. Biswas, G. J. Britton, P. A. Cole, B. D. Johnston, Y. Ju-Nam, P. Rosenkranz, T. M. Scown and V. Stone (2012). "Interspecies comparisons on the uptake and toxicity of silver and cerium dioxide nanoparticles." Environ Toxicol Chem **31**(1): 144-154.

Jadresic, A., L. M. Banks, D. F. Child, L. Diamant, F. H. Doyle, T. R. Fraser and G. F. Joplin (1982). "The acromegaly syndrome. Relation between clinical features, growth hormone values and radiological characteristics of the pituitary tumours." Q J Med **51**(202): 189-204.

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skills.it.ox.ac.uk/it-learning-portfolio

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EndNote Quick Start

Learning Objectives Four and Five
Use *Mozilla Firefox* not *Safari*

Finish at 11:00 please

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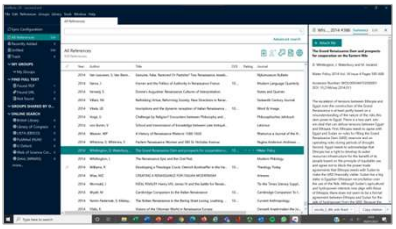
Working on a reference

31

EndNote window



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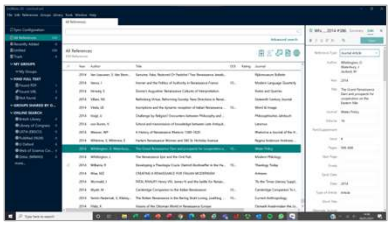
Check and edit a reference

Edit in the details panel



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Author names

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More details

Complete as many fields as possible

Titles – enter in consistent case
(may be capitalised automatically 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 ★★★★★
... and lots more

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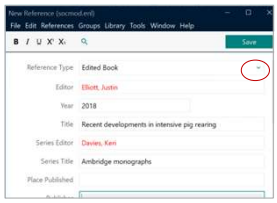
Adding a new reference

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

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EndNote Quick Start

Learning Objective Six

Resume at 11:45 please

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Citing references in a document

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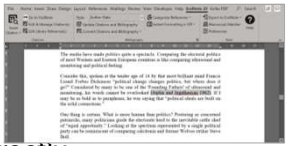
Using *EndNote* with *Word*

EndNote is an Add-In for *Word*



Citations are inserted directly
And formatted automatically

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Inserting a citation in a document "Cite While You Write"

Copy a reference in *EndNote*; **Paste** into text in *Word*

or

Select reference in *EndNote*; **Insert Selected** citation in *Word*

or

Click among text in *Word*; **Find** citation

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Citations in footnotes

Inserting…

Create a *Word* footnote

Then insert an *EndNote* citation

Ibid. or short form appears automatically

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Working with citations in a document

Removing a citation

Select the whole citation including any brackets

Page numbers

References cited

In *EndNote*, a citation report appears for each document

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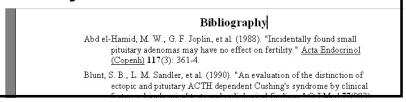
Bibliography in the document

A list of the references cited

EndNote builds it at the end of the document

Format and fields depend on the output style

Updates automatically



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Formatting citations in a document

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Output styles

Controls the way reference details are presented

- e.g. Author-date, MLA, Chicago, Numbered etc.
- Sets the fields, punctuation, text formatting
- Affects citations, bibliography and footnotes

Apply an output style in each document

Different styles to suit each publication

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Choosing an output style

Range of reference styles already available
- Browse the list in the Styles dialog
- Ask your department, for thesis/assignments

Download 100's more from EndNote website

Style By Example:
http://editor.citationstyles.org/searchByExample/

Or create your own! (later course)

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More about *EndNote*

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Obtaining *EndNote* software

Oxford University campus licence for *EndNote*
- ask your department
- or get your personal copy from IT Services website "Get software"

Websites for more information
- www.endnote.com/
- Bodleian Library resources

Other citation software is available
- e.g. RefWorks, EndNote Web

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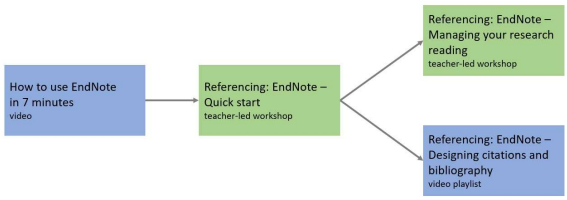
Next steps



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EndNote Quick Start

Learning Objectives:
Seven, Eight, Nine and Ten

Finish at 12:30 please

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iT Centre Learning
iT
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