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Introduction to EndNote X8



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Part 1: Introduction

What is EndNote?

EndNote is a reference management software package which is used to manage bibliographies and references when writing assignments, dissertations, theses and articles. The software is available for both PC and Mac, and there is a web version which you can use anywhere.

EndNote allows you to:

- Store all the references that you find during your research. They can be exported automatically from most databases, or entered manually.
- Store PDF files, pictures, graphs, tables, etc.
- Add citations to your work and create bibliographies in any output style (e.g. APA, Chicago, MLA and Vancouver). There are over 6,000 styles to choose from.

How to obtain EndNote

EndNote X8 is available on all the PCs in the University's open access PC suites.

If you wish to obtain EndNote X8 for a 'personal' University-networked PC in an office or postgraduate room:

- Go to the IT Services website: <http://www.salford.ac.uk/its>
- Click the **Help and Support** tab at the top of the screen.
- Click the **Make a request** icon.
- Scroll down to EndNote, click it and fill in your details on the form.

Make a request



EndNote for home use

If you wish to purchase your own EndNote licence for Windows or Mac, you can receive a student discount by ordering it via the *Student Software Portal* at:

<https://lsoftware.salford.ac.uk/>

There is also a Web version of EndNote that you can use anywhere. It is less sophisticated than the software version, but it is useful for making a back-up of your EndNote library, sharing references – and it is yours for life.

Please see Part 6, pp. 46-48, for more information about EndNote Online.

Part 2: The EndNote Library

An introduction to EndNote libraries

- Your EndNote references are stored in a database called a *Library*. EndNote libraries have the file extension **.enl**.

This is the file you open. →



My EndNote
Library.enl



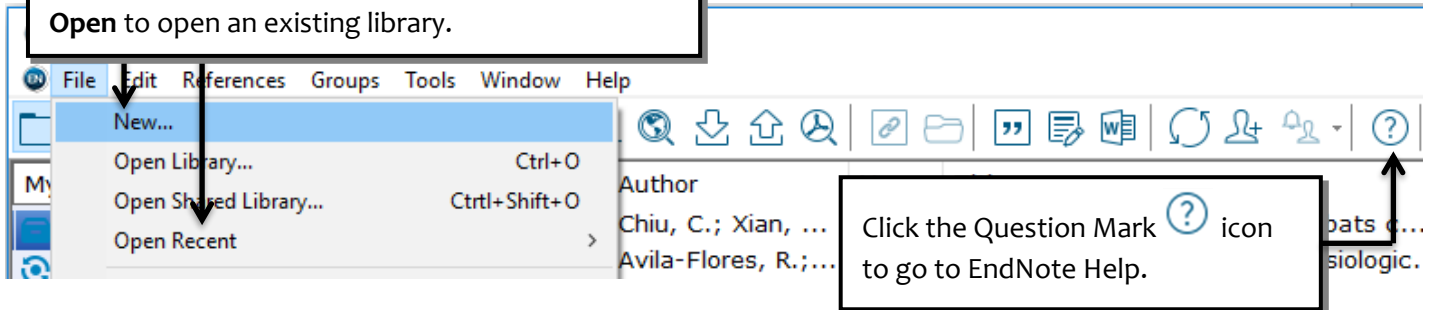
My EndNote
Library.Data

- Each Library has a corresponding folder with the extension **.Data**. This folder will have the same name as the Library, and it is where images, PDF files, etc. are stored. If you move, copy, rename or delete a Library remember to do the same with its corresponding **.Data** folder.
- There is no limit to the number of references you can store in a Library, although it is recommended that you do not exceed 100,000 to maintain efficient performance of the database.
- Although the software allows you to create as many Libraries as you wish, it is strongly recommended that you keep all your references in just one Library. This way you will know where to find them, and will not create duplicate records in other Libraries.
- Within your Library you can create *Groups* (or subsets) to help you organise your references. See Part 4, pp. 25-29, for information about creating and using Groups.
- References can be transferred easily between EndNote X8 and EndNote Online, so you may choose to use the full software when you are University and the Web version when you are at home. It is highly recommended that you use EndNote Online to back up your EndNote references. You can also use EndNote Online to share references and work collaboratively with others. Please see p. 46 for information about EndNote Sync.
- Each EndNote record stores the information required to reference it in a bibliography. Other information, to help you with your research, such as keywords, notes, abstracts and URLs can be stored in a record as well. You can also attach PDF files and images to EndNote records, and you can annotate PDFs with highlights and your own comments.
- EndNote X8 allows you to share your entire EndNote library with up to one hundred people (who are using EndNote X7 or X8), no matter where they are located or what organisation they are affiliated with, and everyone can add to, annotate and use the library at the same time. If you are working as part of a research team and wish to use this service, please see the advice at:

<http://endnote.com/product-details/library-sharing>

Library overview

Go to **File** then **New** to make a new library, or **Open** to open an existing library.



The EndNote Library screen is split into three panes: a **Reference List** pane, a **Groups** pane, and a **Tab** pane.

The Reference List Pane.

This shows a list of all your references, each displayed as a single line.
You can sort the references by clicking on a column heading.

Author	Year	Title
Brinklov, S.; Kal...	2009	Intense echolocation calls from two
Chiu, Chen; Mo...	2007	The role of the external ear in vert
Clayton, N. S.; ...	2009	What do jays know about other mir
DeLong, C. M.; ...	2008	Evidence for spatial representation
Emery, N. J.	2006	Cognitive ornithology: The evolutio
Emery, N. J.; Cl...	2009	Tool use and physical cognition in t
Emery, N. J.; Se...	2007	Cognitive adaptations of social bon
EUROBATS Secr...	2004	EUROBATS: The Agreement on the
Fraser, O. N.; B...	2011	Ravens reconcile after aggressive c
Funk, M. S.	2002	Problem solving skills in young yello
Goto, K.; Watan...	2012	Large-billed crows (<i>Corvus macrorh</i>
Greenhall, Arthu...	1982	House bat management
Grothe, B.; Park...	2000	Structure and function of the bat s
Hagino, T.; Hiry...	2007	Adaptive SONAR sounds by echoloc
Hartle, D.	2008	Alex & Me: How a scientist and a p
Holland, Richard...	2008	Bats use magnetite to detect the e
Holzhaider, J. C...	2011	The social structure of New Caledo
Jen, P. H. S.; W...	2008	Echo duration selectivity of the ba
Laudato, Anthony	2010	Bird grooves to the beat
Lefebvre, L.; So...	2008	Brains, lifestyles and cognition: Are
Moss, C. F.; Sin...	2003	Neurobiology of echolocation in bat
New York State...	2009	Guidelines for conducting bird and l
Pepperberg, Ire...	1999	The Alex studies: Cognitive and co
Pepperberg, I. M.	1999	Rethinking syntax: A commentary c
Pepperberg, I. M.	2001	In search of King Solomon's ring: C
	2004	Cognitive and communicative capa
	2006	Grey parrot (<i>Psittacus erithacus</i>) n
	2006	Cognitive and communicative abiliti

The Groups Pane.

These are subsets (or folders) of references saved for easy retrieval. Click on the title of a group to see its contents displayed in the Reference List pane.

The Tabs Pane.

This includes tabs to three commonly used functions – *Reference*, *Preview* and *Attached PDF*.

Reference overview

To see all the details for a reference you can either use the Reference tab, or double-click on it in the Reference List pane.

- Fraser
- Mink, M. S. 2002 Problem-solving skills in young yellow ... Animal Cognition
- Goto, K.; Watana... 2012 Large-billed crows (*Corvus macrorhyn...* Animal Cognition
- Greenhall, Arthur M. 1982 House bat management
- Grothe, B.; Park, ... 2000 Structure and function of the bat sup... Microscopy Research and T...

Each reference has its own unique number. EndNote uses these numbers for formatting, and they cannot be changed.

The screenshot shows the EndNote X8 interface with a reference record open. The record details are as follows:

- Reference Type:** Journal Article
- Author:** Goto, K.; Watana...
- Year:** 2012
- Title:** Large-billed crows (*Corvus macrorhynchos*) have retrospective but not prospective meta...
- Journal:** Animal Cognition
- Volume:** 15
- Issue:** 1
- Pages:** 27-35
- Start Page:** 27
- Research Notes:** regarding the manuscript. We also wish to thank Ei-Ichi Izawa for his support in the care and ma... the laboratory. This research was supported in part by a Grant-in-Aid for Scientific Research (#18/5950 and #22700271) from the Japan's Ministry of Education, Culture, Sports, Science and Technology (MEXT), given to the first author and the Global COE Program (D029) of Keio University. Springer heidelberg Heidelberg
- URL:** <https://link.springer.com/content/p...>
- File Attachments:** Goto-2012... crows (Cor...
- Author Address:** [Goto, Kazuhiro; Watanabe, Shigeru] Keio Univ, Dept Psychol, Minato Ku, Tokyo 1088345, Japan. [Goto, Kazuhiro] Kyoto

Callout boxes provide the following instructions:

- Font and Size:** The font and size should both be set as **Plain**, unless you need a special style for a character. You do NOT need to set italics or bold; EndNote will do this for you.
- Case:** Use the **Aa** button if you need to change case – for example, for titles imported all in capitals.
- Options:** Use the **Options** button to hide or display empty fields in the record, and display the Ratings tool.
- Numbers:** When you are typing in numbers, for example, for pages or volumes, you do not need to type v. or pp. before them – just the numbers.
- Close Button:** When you have finished editing a record, click the small **[X]** close button. This will save any changes you have made to it.
- Additional Fields:** As well as the fields that are required to format your bibliography, EndNote provides a number of fields for your own use, for example, to write your own research notes, and attach files and images. How you use these fields is your own choice.

EndNote has some features to help with your information management. To help you keep track of your workload you can mark records when you have read them, and also assign a rating to remind yourself how useful you found the paper.

Recently Added is a temporary group showing recent additions to your library.

Click the status button to mark when you have read an article.

The paperclip indicates that a file has been attached to the record.

Use the Rating tool to mark how useful you have found a paper. You can either click here to assign stars, or do this in the Rating field within the open record.

Author	Year	Title	Rating
Brinklov, S.; Kal...	2009	Intense echolocation calls from two '...	
Bunkley, Jessie	2015	Anthropogenic noise alters bat activit...	
Chiu, Chen; Mo...	2007	The role of the external ear in vertical...	
Chiu, C.; Xian, ...	2008	Flying in silence: Echolocating bats c...	★★★★
Clayton, N. S.; ...	2009	What do jays know about other minds...	
Cussen, Victoria...	2017	Psittacine cognition: Individual differe...	
DeLong, C. M.; ...	2008	Evidence for spatial representation of...	★★★
Emery, N. J.	2006		
Emery, N. J.; Cl...	2009		

Creating your own EndNote library

Go to the **File** menu and select **New**.

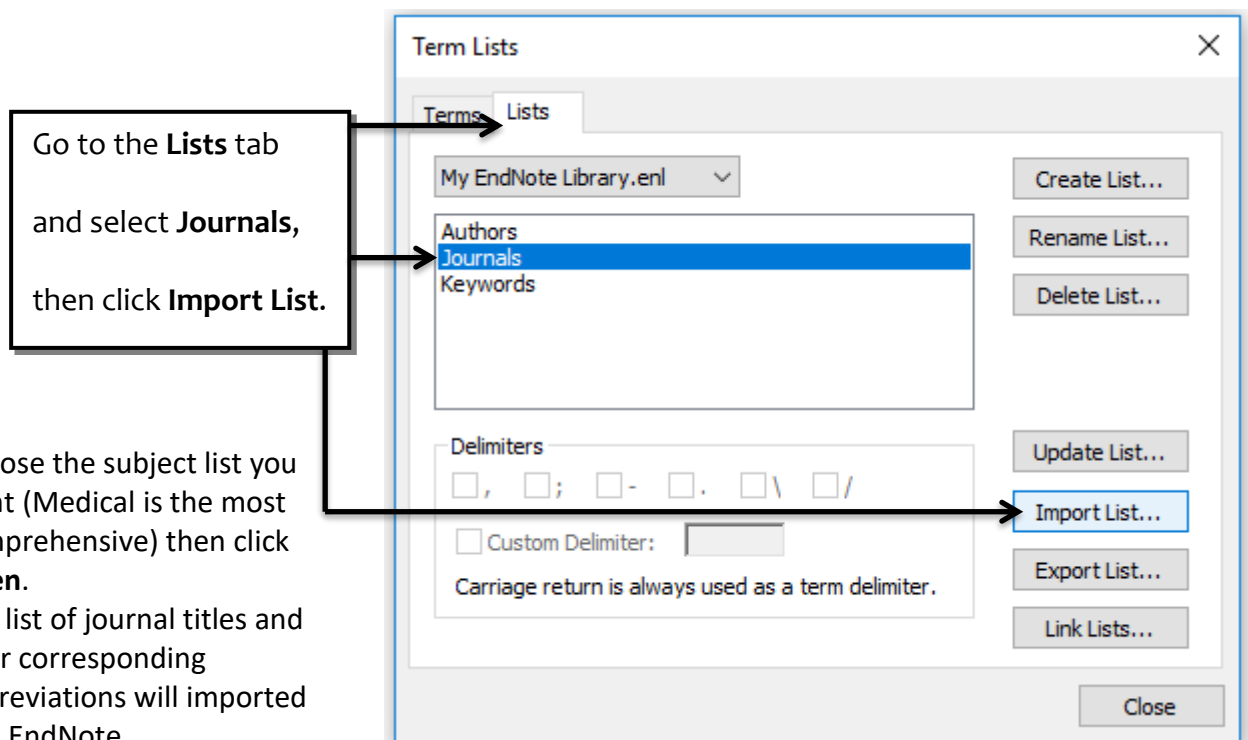
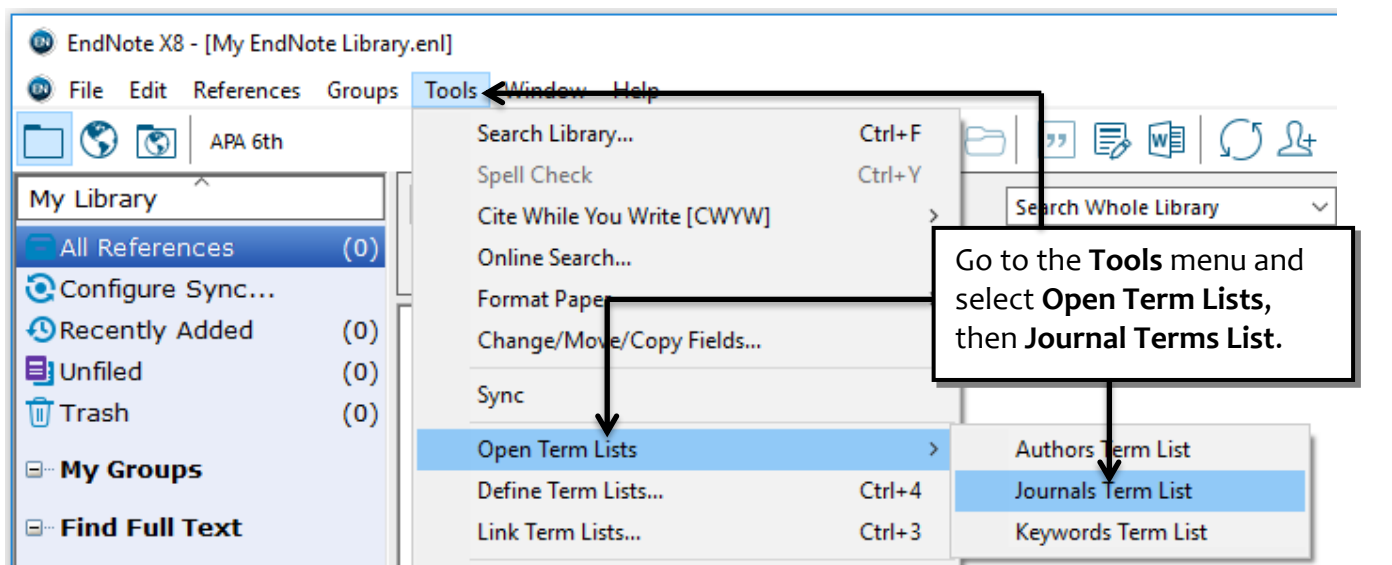
Open your F: drive, and give your library a new name if you wish. Note that it must be saved as **EndNote Library (*.enl)**.

Click **Save**. Your new Library will have been created and will open automatically.

Importing a Term List for journal titles

Depending on the subject area you are working in you may wish to import a Journal Term List into your EndNote Library before you start saving any references.

If you are working in fields such as Medicine and Biosciences, some referencing styles require you to use officially recognised abbreviations for journal titles and other styles want full journal titles – and the databases you are retrieving records from may use full titles or abbreviated titles. A Journal Term List will give you the flexibility to use either form of title.



Choose the subject list you want (Medical is the most comprehensive) then click **Open**. The list of journal titles and their corresponding abbreviations will be imported into EndNote.