

USING ENDNOTE WITH MS WORD

In MS Word go to: View → Toolbars → Endnote X2

Select citations from an Endnote Library as you are typing your document by using the **Find Citations** feature on the Word Endnote Toolbar. By clicking on **Insert Selected Citations** icon, insert the selected citation into your document. The in-text citation will appear and an entry in your bibliography will automatically be created in the Output Style of your choice.

You may reformat your citations and bibliography into different Output Styles. Citations in your document comprise a *traveling library* and can be shared with others, even if they do not have Endnote on their computers. Remove the field codes (shown as highlighted citations and bibliography) when you wish to create a static document:

Endnote X2 Word Toolbar → Remove Field Codes

Endnote comes with Word templates for hundreds of bibliographic formats, e.g. PNAS, APA, etc.

ENDNOTE WEB

Endnote Web, though less robust than Endnote on the hard drive, is Web-based. Access **Endnote Web** through the Electronic Resources Gateway by typing in *Endnote Web* or go to it through the link in Web of Science. Create an Endnote Web Account by using the Sign Up form. Your E-mail address and chosen password will be your login.

You can transfer references between your desktop Endnote Library and your Endnote Web from Endnote:

Tools → Endnote Web → Transfer

From Endnote Web use the Export function, exporting as a **Refer** text file. Import into your Endnote Library using the **Refer** Import Filter.

Guide based on Endnote X2 2009

ZOTERO

Zotero is a free Firefox plug-in that is a Web-based bibliographic management tool. Though less robust than Endnote, Zotero is especially helpful in importing citations to Web-based resources that are not indexed, thus cannot be automatically imported into Endnote, such as Web pages. Zotero library references can be exported to Endnote, but files attached to the references will have to be relinked in your Endnote Library records.

WHERE TO GO FOR HELP

UH Mānoa Librarians

Eileen Herring eherring@hawaii.edu 956-2543

Sara Rutter srutter@hawaii.edu 956-2540

Allie Jordan asjordan@hawaii.edu 956-2544

Endnote Help

Click on the ? for in-context help or go to **Help** in your Endnote Toolbar for an index of help topics.

Comprehensive Endnote X2 Manuals

Endnote X2 Manual for Windows: <http://endnote.com/support/helpdocs/EndNoteX2WinManual.pdf>

Endnote X2 Manual for Mac: <http://endnote.com/support/helpdocs/EndNoteX2MacManual.pdf>

Updating Import Filters & Output Styles

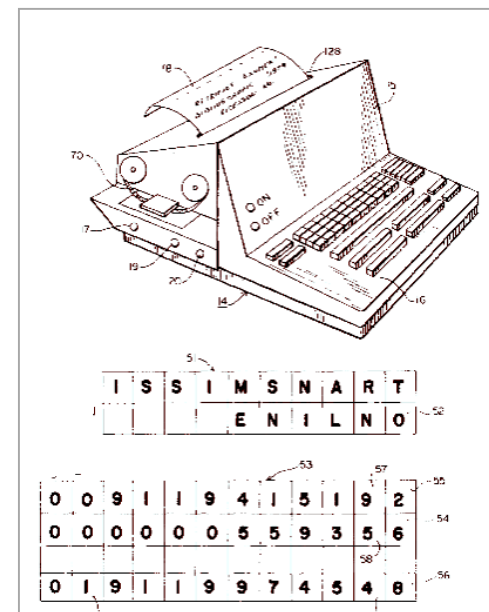
At <http://www.endnote.com> go to *Support & Services*, click on **Import Filter** or **Output Styles**. Download the needed Filter or Output Style into your Filters or Styles folder of the application.

WHERE TO GET ENDNOTE

ITS: Download the site license agreement at <http://www.hawaii.edu/sitelic/endnote.html>.

Science & Technology Wing: Some computers have Endnote and MS Word; save to your USB drive.

INTRODUCTION TO ENDNOTE



Loewenthal A.L. et al. inventors. 1971, Feb. 16. Storage and Retrieval System [Internet]. United States patent US 3,564,508. [Cited 2007 Sep 25]. Available from: <http://www.uspto.gov/>.

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SCIENCE & TECHNOLOGY WING
2009



GETTING STARTED WITH ENDNOTE

CREATING AN ENDNOTE LIBRARY

File → New → Give your Library a file name

This will create a **.enl** file and a **.Data** folder
Every Endnote Library can hold an infinite number of records.

We recommend that you create one Endnote library to hold all of your literature research and use the *Groups* function to organize your literature for specific projects.

Tools → Customize Toolbar

Add icons of functions to your Toolbars by dragging icons to the Toolbar.

IMPORTING JOURNAL TERM LIST

Tools → Define Term Lists → Journals → Import List

- To select the journal lists in the disciplines that you are interested in, find your Endnote application folder.
- Open up the Terms folder
- Select the file for the discipline you wish to import, e.g. anthropology, astronomy, bioscience, chemical, economics, humanities, Korean medical terms, law, medical, philosophy, religion, or Zoological Record.

Importing a **Journals Term** list stores different forms of journal names, such as abbreviations. Creating a Terms list is specific to an Endnote Library. As you add references, your terms list will be updated with new journal names.

CREATING A REFERENCE MANUALLY

References → New Reference

- Select the type of reference (journal article, film, etc.)
- Enter author names, one author name per line:
Example: Einstein, Albert OR Albert Einstein

Example: Einstein, A.
Lorentz, H.
Minkowski, H.

- Enter the bibliographic data into the other fields.
- Endnote Library records can be edited as needed.

IMPORTING REFERENCES FROM ONLINE JOURNAL ARTICLE DATABASES

To import references into an Endnote Library from online journal article databases (e.g. CAB, Biological Abstracts, etc.) use an **Import Filter** OR **Direct Export**.

Note: The **Connection** function does not work for licensed databases that require authentication. You must import using the **Import** function.

- **Import Filters** are used to import references saved in a text file into an Endnote Library. A specific **Endnote Import Filter** is needed for each database.
- **Direct Export** is faster than importing using an **Import Filter**; saved references are directly exported from the database to a selected Endnote Library. This function is not available for all of the databases.

EXAMPLES OF IMPORTING

CSA Databases: Importing Using an Import Filter

1. In the database, mark the records you want to save.
2. Click on the link to **Save, Print, Email**
3. **Save** the references
4. Open an Endnote Library
5. In Endnote: **File** → **Import** → **Choose file**
6. Select the text file of your saved references
7. In Endnote: **Import options** → **Other filters**
8. Select the **Import Filter** for the database and vendor you used, e.g. ASFA via CSA
9. Leave as the default **No Translation** in the Text Translation box

10. Click on Import

EbscoHost: Importing Using Direct Export

1. In the database, mark the records you want to save by adding those records to a Folder.
2. Click on the link to the Folder, and select the records you want to import into an Endnote Library
3. Click on **Export**
4. Select **Direct Export to Endnote**
5. Select the **Endnote Library** to which you want to save the references. If the references do not automatically import simply drag the file of saved records on your desktop to the Endnote icon.

IMPORTING USING CONNECTION FILES

Note: At UH Mānoa, Connection Files only work for non-licensed (no login) resources, such as library catalogs.

From your Endnote Library:

1. Click on Online Search icon in Toolbar OR Tools → Online Search → New Search
2. Perform your search in the selected catalog
3. Import references by using the **Copy References** function in the Toolbar

INSERTING A FILE INTO A RECORD

A PDF of a full-text journal article, scanned book chapter, chart, image, or other file can be inserted into a record in your Endnote Library:

From an Endnote Library record:

- Click on **Attach Figure** in the Toolbar, file will go into *Figure* field of record.
- References → Insert File. File will go into *Attached File* field of record.
- You can also drag and drop files into the **Attached figure** or **Attached file** fields.

The attached files will be saved in your Endnote Library **.Data** folder.