

Automatically Creating Citations and Bibliographies with EndNote X3 (13)

A University of Michigan Library Instructional Technology Workshop

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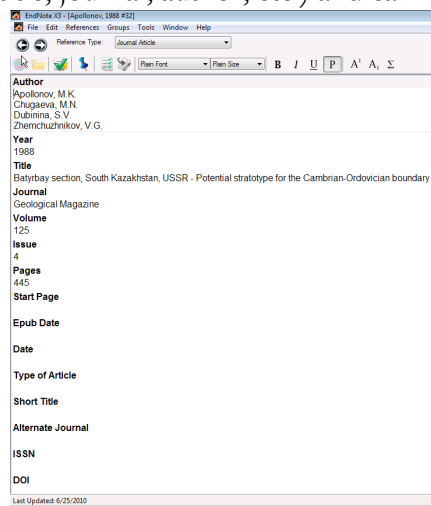
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OVERVIEW

EndNote is a bibliographic management software program that allows you to collect and organize citations, and then insert them into a word processing program in a correctly formatted bibliographic style. EndNote calls each collection of references a **Library**. EndNote libraries contain basic bibliographic information about each citation (title, journal, author, etc.) and can also hold information such as keywords, notes, and abstracts. Each citation has a specific **Reference Type** – journal, book, book section, case, etc. The Reference Type determines how EndNote will format the bibliography and the in-text citation based on the **Output Style** you choose (APA, Chicago, etc.). Note that you do not add formatting here to the citation (such as bold, italic, etc.), except for super and subscript, and words that should be all capitals (such as AIDS). The **Notes**, **Research Notes** and **Abstract** fields can each accommodate roughly 16 pages of text. You can type text in, or copy and paste it.



There are fields to add links to objects, URLs, and PDFs. Be sure to use the **References** menu and then **File Attachments** to add these components.

Citations can be added to EndNote in several ways, which are discussed in further detail in this handout. New references are imported directly from the database (called a Direct Export), via **filters** or through the **Online Search** feature. Additionally, references can be created manually. For more information on these options, see page [5](#).

EndNote allows libraries to be networked and accessed by multiple users. If you are going to be using a networked version of EndNote, please refer to the manual or the online help. EndNote also provides manuscript templates that you can use to set up your paper for electronic submission to a publisher. To find out more, search on *Manuscript Templates* in EndNote's help, or in the EndNote manual.

Note: Toolbar icons may look slightly different on the Mac (most screen shots are from Windows).

ENDNOTE LIBRARY AND DATA FOLDER

When you create an EndNote library, a folder with the same name as your library, plus *.DATA* is created. If you use the Figure, Chart, Equation, etc. reference types or you insert an image, object, or PDF, a copy of that file is placed in the *.DATA* folder. If you need to change an image or figure, you should change the one that resides in the *.DATA* folder, *not* the original. In addition, you should not copy and paste images into the reference, but rather use the **File Attachments** command in the **References** menu. If you want to zip these two files together, see the instructions in the next section. The EndNote manual recommends that you keep all of your references together in one main EndNote library to avoid unnecessary complexity, but Microsoft Word can work with more than one library at a time (there is also a plug-in for WordPerfect, but this handout specifically discusses EndNote and Microsoft Word).

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MOVING YOUR ENDNOTE LIBRARY

If you move your library to a different computer (or disc), or are going to share it, **don't forget** to move/share the *.DATA* folder as well. EndNote gives you the option of creating a single compressed file that includes both your EndNote library and your *.DATA* files.

1. Go to the **File** menu, select **Compressed Library (enlx)**, then select **Create...**
2. Give the new file a name (it will have a *.enlx* extension) and press the *Save* button.

Each formatted citation in your Word document is saved with embedded reference data, which is sometimes referred to as a “traveling library”. This means that you can collaborate with others on the same paper, even if they do not have the same full EndNote library. Note, however, that the traveling library **does not** have the *Notes*, *Abstract*, or *Image* fields. If you are working on a single paper and moving between different computers, EndNote recommends keeping the full library with your paper so you are always accessing and inserting paper citations from the same library.

WHAT'S ENDNOTE WEB?

EndNote Web is an online only version of Endnote, similar to RefWorks. You can access your library from any computer with Internet access, but EndNote Web is only accessible through the database ISI Web of Knowledge (you will see a link to My Endnote Web). You must register if you have never used Endnote Web before. Once you register and sign in, you can save citations from your searches in the ISI database.

Note: The Faculty Exploratory and the Knowledge Navigation Center do not officially support EndNote Web, although we do support RefWorks for your web-based bibliographic management needs.

ASSISTANCE WITH ENDNOTE

KNC and Exploratory's EndNote Page <http://guides.lib.umich.edu/content.php?pid=30390>

The KNC/Faculty Exploratory's EndNote page has this handout as well as links, detailed database instructions, and other useful information about EndNote.

EndNote Web Site <http://www.endnote.com>

The EndNote website is another great place to get help, with resources like EndNote's Tech Support Database and a 30-day trial version of EndNote.

Knowledge Navigation Center (KNC) <http://www.lib.umich.edu/knc/>

The KNC is located on the second floor of the Graduate Library. Call 647-5836 or email knc-info@umich.edu to make an appointment for EndNote help.

Faculty Exploratory <http://www.lib.umich.edu/exploratory>

The Faculty Exploratory is located on the second floor of the Graduate Library. Email exploratory@umich.edu or call 647-7406 to make an appointment for EndNote help.

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TERM LISTS AND JOURNAL ABBREVIATIONS

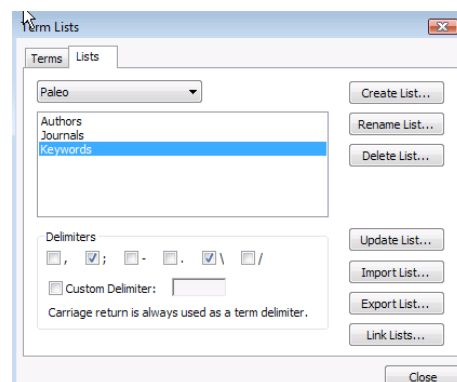
EndNote automatically stores three **term lists** in each library: keywords, authors and journal names. Term lists facilitate data entry and improve consistency and accuracy. As you begin to type in one of these fields, EndNote will suggest matching terms from the appropriate list. You can also continue typing, and the term will appear in red text if it is a new term. When you close the reference, the new terms will be added to the appropriate list. However, the terms from references you delete do not get deleted from the term lists.

JOURNAL ABBREVIATIONS

If you add the journal's abbreviated title in the *Alternate Journal* field as you enter the reference (or as it is imported), the abbreviation will be automatically added to the *Abbreviations 1:* field of that journal in the Journal Term list.

However, most sources from which you'll import citations don't have the journal abbreviations in the record. If you need to use journal abbreviations, EndNote comes with 12 journal term lists, including those accepted by the National Library of Medicine (NLM), the American Chemical Society (ACS), and the Modern Language Association (MLA). Other term lists include Anthropology, Law, and BioScience. You may add as many lists as you wish, depending on the needs of your discipline.

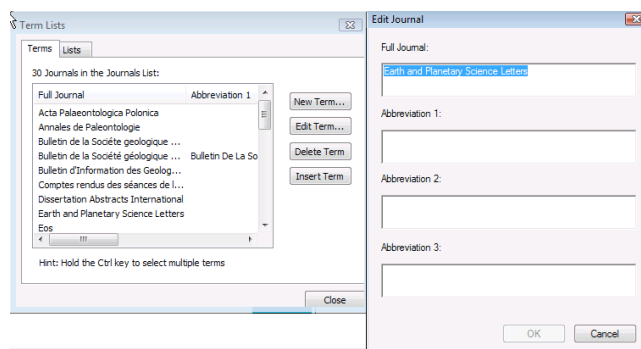
1. Go to the **Tools** menu and choose **Define Term Lists**.
2. Click on the *Lists* tab, choose *Journals* from the list, and then click on *Import List...*
3. Browse to the Terms folder in the EndNote application folder, then choose the appropriate list and click *Open*. The list will be imported to the selected EndNote library.



Remember, each EndNote library has its own term lists.

To add an abbreviation at a later date, go to the **Tools** menu, choose **Open Term List** then choose the **Journals Term List**.

1. Choose the correct journal, be sure you're in the *Terms* tab and choose *Edit Term...*
2. Add the abbreviation in the *Abbreviation 1:* field and click *OK* to close the dialog box.
3. If the style you have selected uses the abbreviation, the appropriate abbreviation will appear for all articles from this journal, whether or not the individual reference has anything in the alternate journal field.



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ADDING CITATIONS INTO ENDNOTE

In addition to adding citations manually, you can bring citations into EndNote using three other different methods: **direct export**, **filters**, or **Online Search**.

- **Export** or **direct export** is the general name for a tool within databases that automatically saves and filters citations. Only some databases have this feature.
- Search the database through a web browser. Save the results as a text file and **import** it into EndNote using the **filter**.
- With **Online Search**, (previously known as “Connection Files,”) EndNote connects directly from your EndNote library to the selected database and pulls citations into your library.

The University Library provides general instructions for importing references as well as database-specific instructions for the most commonly used databases. For more information, please visit <http://guides.lib.umich.edu/content.php?pid=30390&sid=222434>.

USING DIRECT EXPORT

Some databases (e.g. [Web of Knowledge](#), [ProQuest](#), [UM-Medsearch](#)) offer a *Direct Export* feature that automates the downloading and filtering process in order to move citations from their database to EndNote more easily. For some databases, you may have to download and install a filter before the direct export tool will work. Once the filter is installed, you may also have to choose the correct filter after clicking the database’s export option. For more information, go to <http://guides.lib.umich.edu/content.php?pid=30390&sid=222434>.

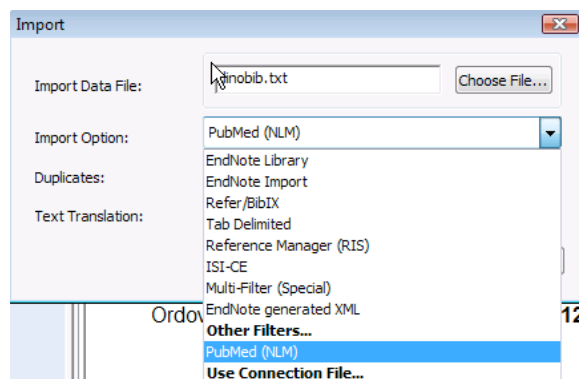
Note: In some cases, the file will download to your local machine automatically. You may need to rename the file with “.txt” extension, and then follow the instructions below.

IMPORTING USING FILTERS

Filters tell EndNote how to interpret information based on the database from which it was saved. Many filters come with EndNote, but if you don't find what you're looking for, visit the EndNote website (<http://endnote.com/support/enfilters.asp>) and look for your database. Depending on when you purchased EndNote, it may not come with the correct filter file for Mirlyn. Visit <http://guides.lib.umich.edu/content.php?pid=30390&sid=223436> for the latest filter.

Each database has its own search and save method. Once you have determined that there is a filter available for the citations you want to import, follow the appropriate instructions for the database you are using, and save the citations to your local machine as a text file. We have provided some step-by-step instructions for several databases at <http://guides.lib.umich.edu/content.php?pid=30390&sid=222434>.

1. Once you have a text file to import, go to EndNote's **File** menu and choose **Import**, or click on the **Import** (↓) icon in the toolbar. Click on the *Choose File* button to navigate to the text file containing your saved records (on the Mac, select the appropriate file in the dialog box and continue to the steps below).
2. In the *Import Option* pulldown menu, if you don't see the correct database in the list, select *Other Filters*, and then choose the correct filter for the database you are using.
3. You can choose to import duplicates, import duplicates to a separate library, or discard duplicates. (If you keep duplicates, they can be found using the **References, Find Duplicates** command.) **Note:** The *Text Translation* field does not refer to languages, but rather to the text encoding. Generally, for all files except MARC format files, choose *No Translation*. However, if you've used Unicode, you'll need to select the correct Unicode translation.
4. Click on the *Import* button. Once the references are imported, they should appear in the main Library. If you cannot see your other references, go to the **References** menu and choose **Show All References** or click on *All References* in the **Groups** area.






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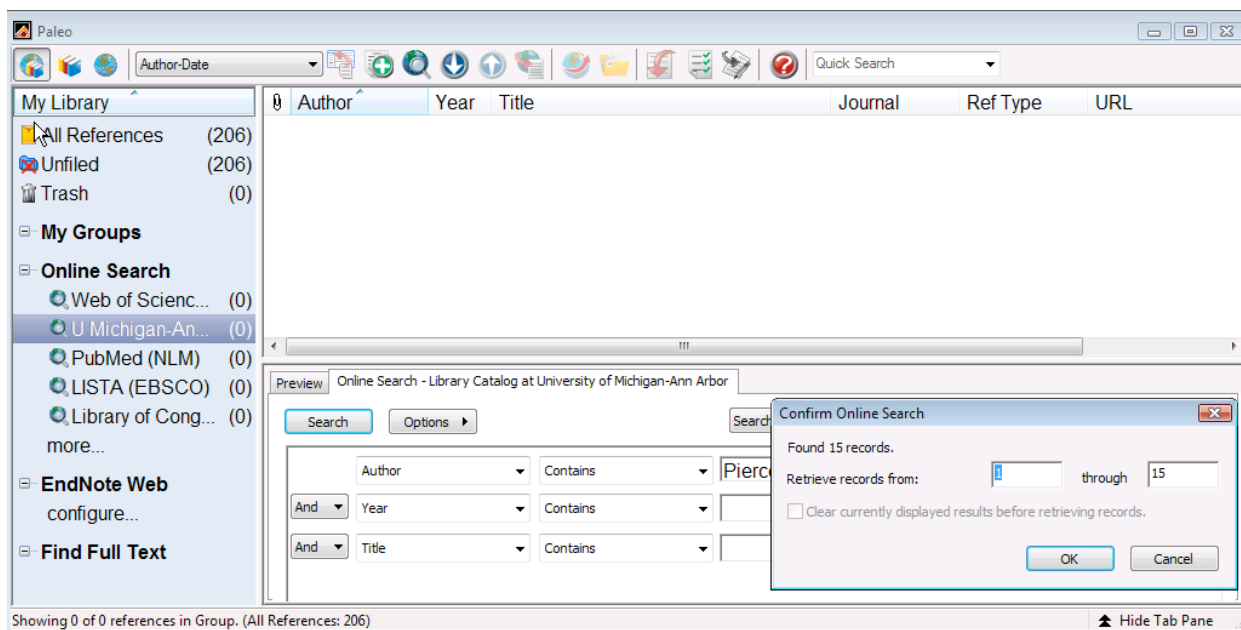
IMPORTING USING ONLINE SEARCH

A word about Online Search: EndNote includes a number of connection files. However, to use many of the connection files (other than those for the UM Library Catalog and other library catalogs), you need to have an individual account number for each database. The Library provides access to a number of databases for UM-affiliated people, but these sources must be accessed through the Library's Search Tools, not by individual accounts. This means that you will not be able to use many of the connection files included with EndNote.

EndNote X3 has different Library Display Modes.  **Integrated Library & Online Search Mode** automatically saves all search results found using Online Search in your EndNote library.

By switching between  **Local Library Mode** and  **Online Search Mode**, you choose which items you want downloaded from the Online Search into your EndNote library. Start in Local Library Mode and go to Online Search Mode to conduct your searches.

1. To get started in any mode, go to the **Tools** menu, choose **Online Search**, and select **New Search**, or click on the **Online Search** () icon in the toolbar. Navigate to *U Michigan – Ann Arbor* or the appropriate connection file. Click *Choose*. Once you've done a search, you can also choose that source from the Online Search area at the left of your EndNote window.
1. In the search box, type in your terms, and then click on the *Search* button. **Note:** Some databases do not allow the Boolean operators or phrase (with quotation marks) searching. If you get an error message on your search, try clearing all but the first search field or remove the quotation marks.
2. A window will appear showing you how many results your search produced. You can import all of the results or type the range you'd like to import, but you will not be able to preview the results before you import them. Click *OK*, and the records will be added to your EndNote library.



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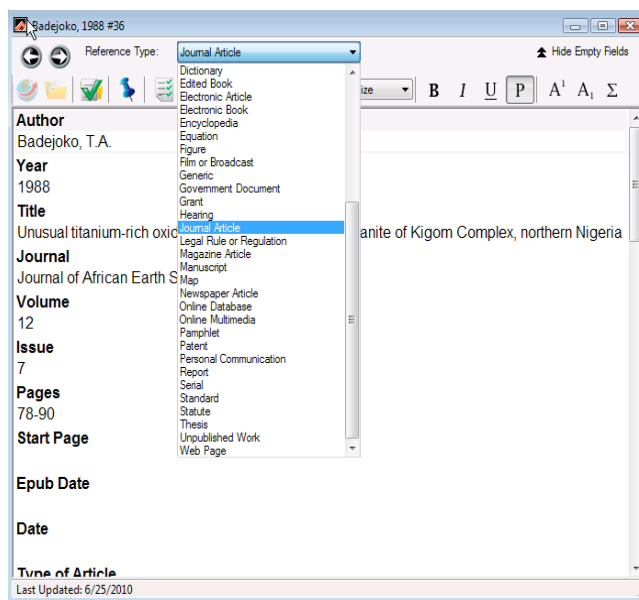
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CREATING REFERENCES MANUALLY

To manually add a new reference to your EndNote library, click on the New Reference (🟢) icon in the toolbar, or go to the **References** menu and choose **New Reference**.

1. Choose the appropriate option from the *Reference Type* pulldown menu as shown at right. Remember, the Reference Type determines how EndNote will format the bibliography and the in-text citation based on the **Output Style** you choose (APA, Chicago, etc.).
2. Enter the citation information by clicking in the various fields.
3. When you are finished, close the reference window. EndNote will prompt you to save your changes. You can check the *Do not display this message again* box and then press *Yes*. After this, EndNote will automatically save the reference when you close.



TITLE CAPITALIZATION

Depending on the output style you choose, the title of the journal article, book, etc. *should* be automatically capitalized correctly. However, if you find this is not the case, check the style to see what format it is using. See our [Editing Styles with EndNote 12](#) for more information about styles.

ANONYMOUS AND CORPORATE AUTHORS

If a reference has **no author**, you should leave the *Author* field blank. The style that you are using determines how anonymous references are treated and automatically formats it for you. If the reference has a **corporate author** (for example, *State of Michigan*) put a comma after the name in the author field (for example, “*State of Michigan,*”) and the *Author* field will be formatted correctly.

USING DIACRITICS AND UNICODE

There are a few different ways to enter special characters or characters with diacritical marks. One way is to use the character codes, another is using the character map, and the third way is by copying and pasting from another document or application. In addition, EndNote now supports Unicode. To find out more, search on *Diacritics* or *Unicode* in EndNote’s help, or in the EndNote manual.

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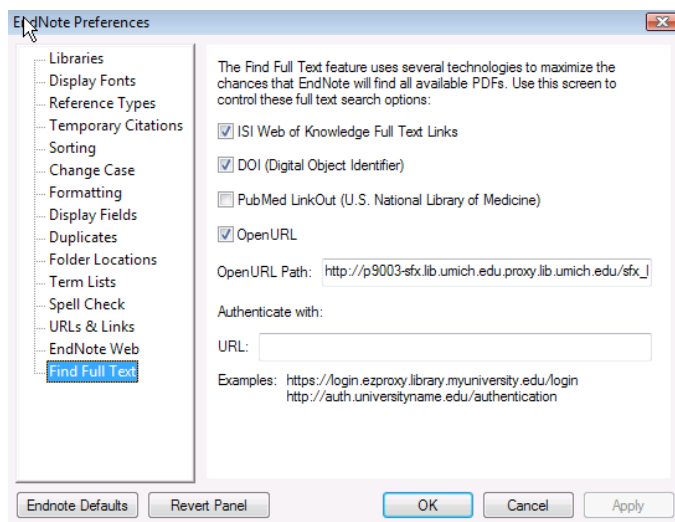
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LOCATING FULL TEXT ARTICLES VIA ENDNOTE

CONFIGURING OPENURL TO WORK WITH SFX

EndNote can be configured to work with SFX, the University of Michigan University Library's OpenURL resolver. This means that you can quickly and easily locate full text of the references in your database in the library's databases and catalog.

1. Go to the **Edit** menu and choose **Preferences...** (on a Mac, go to the **EndNote** menu).
2. From the list on the left, select *Find Full Text* and check the *OpenURL* checkbox.
3. Type this URL into the *OpenURL Path* textbox:
http://p9003-sfx.lib.umich.edu.proxy.lib.umich.edu/sfx_local
4. Type this URL into the *Authenticate with* textbox:
http://proxy.lib.umich.edu/login?url=%op



5. Click the *OK* button and close the Preferences dialog box.

To use this feature, double-click on any reference in your library, go to the **References** menu, choose the **URL** submenu, and select **OpenURL Link**. EndNote searches the University of Michigan online resources and directs you to the full text of a citation via MGetIt, if available.

FINDING FULL TEXT AUTOMATICALLY

EndNote will locate and download the full text file or an article(s). To search for full text for a reference in your EndNote library:

1. Select the reference(s) – this can be your entire library (up to 1000 references), a custom group, or search results and go to the **References** menu and choose **Find Full Text**.
2. EndNote will display your results in a temporary group called **Full Text Found**. This group will display the references for which a full text article was found and downloaded or a URL was added to the reference. Once you close your EndNote library or start another

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search, the items in that temporary group will be gone, however, they will remain in your EndNote library.

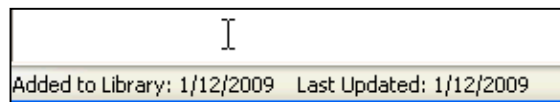
ORGANIZING YOUR LIBRARY

FINDING DUPLICATES

EndNote can search your library to locate duplicate references by going to the **References** menu and choosing **Find Duplicates**. A temporary group **Duplicate References** will display one of each of the duplicates. To view each pair of duplicates, select all of the references in the **Duplicate References** group, then go to **All References** and scroll through, the most recent addition of the duplicate will be highlighted.

DATE STAMPING

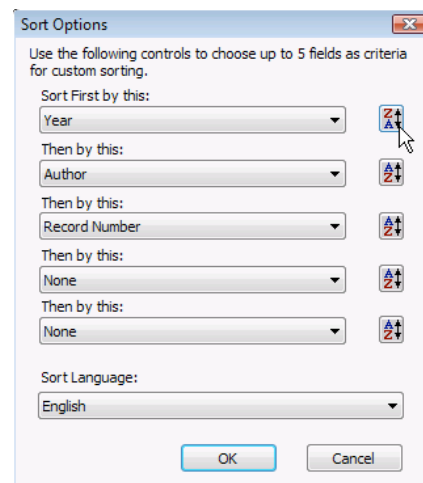
References now include date stamp information. Each reference contains an *Added to Library* date and a *Last Updated* date in the bottom of the reference window. If references were added using an earlier version of EndNote they will not have an *Added to Library* date. The Search and Sort features include fields for these date stamps.



SORTING YOUR LIBRARY

EndNote Libraries can be sorted in various combinations, including by author, year, title, publisher, and reference type. When you are viewing the library in list view, you can quickly sort the fields that are showing by clicking on the Field name (*Author*, *Title*, etc.). If you click on the field name again, it will switch from ascending to descending order.

For a complete list of sorting options, go to the **Tools** menu and choose **Sort Library**. Use the pulldown menus to select how you want to sort your library, and use the icons on the right side of the window to indicate ascending or descending order. Click on the **OK** button when you are ready to sort.



USING GROUPS

Groups were a new feature in EndNote 11, and are very similar to regular computer folders. A **Groups** menu is located between **References** and **Tools**. Groups created by default include **All References** and **Trash**. Additionally, there are contextual groups that appear after importing references (**Imported References**) and after searching a library (**Search Results**). Each EndNote library can have up to 500 user-created groups. EndNote 13 has two different types of groups: *Custom Groups* and *Smart Groups*. Custom groups are groups that you create yourself to

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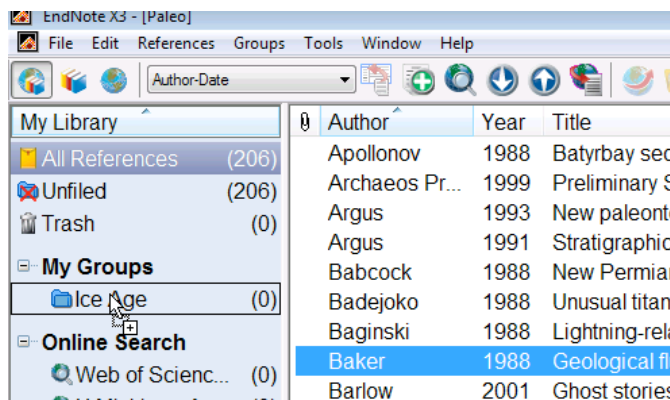
organize your resources. Smart groups allow you to create groups based on particular search criteria, which are dynamically updated as more references are added to your library.

To create a group, right-click in the Groups area and choose *Create Group*, or go to the **Groups** menu and select **Create Group**.

To rename a group, double-click on the group name or right-click in the Groups area and choose *Rename Group*. You can also go to the **Groups** menu, and select **Rename Group**.

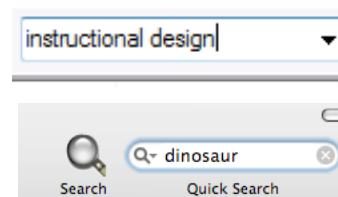
To delete a group, right-click in the Groups area and choose *Delete Group*, or go to the **Groups** menu then **Delete Group**. (Note: Deleting a group does *not* remove the references from the main library.)

To add references to an existing group, drag-and-drop the desired references to the group name, or go to the **Groups** menu and choose **Add References To**, and select the correct group from the list.



SEARCHING YOUR LIBRARY

For a simple search, you can use the **Quick Search** box at the top of the screen. Type in your search term and then press *Enter/Return* on the keyboard. The search results will display below. EndNote remembers recent search terms, and displays them if you click the arrow in the search box.



You can also do a more complex search by using the *Search* tab at the bottom of your screen (if you don't see the below, click the Show Tab Pane in the lower right corner of the screen).

1. Make sure that the *Search* tab is selected and *Search Whole Library* appears in the bottom pulldown menu. Click in the first field to enter the search word and select the field type by using the *Any Field* pulldown menu. To build a more complex search between two or more fields, use the Boolean operators, *And*, *Or*, and *Not* from the left-most pulldown menu.
2. Click the *Search* button.



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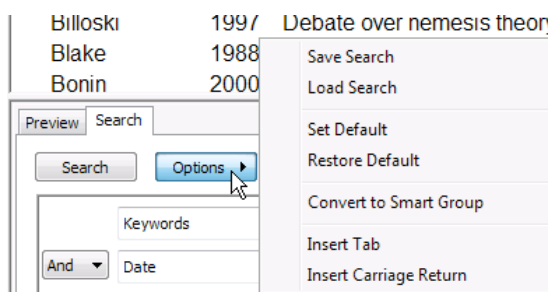
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3. A new group will appear under **All References** titled **Search Results** and your search results will display in the main upper pane in the EndNote window.

You can see additional options by clicking on the *Options* button near the *Search* button. On the Mac, this is a pulldown icon ().

- The *Add Field*, *Insert Field*, and *Delete Field* options refer to the number of search fields within your dialog box –the default is two. *Add* adds a field at the end, while *Insert* puts a field immediately after the active field (the one with the cursor inside). To delete a field, select it by clicking inside the field, then click the *Delete* button.
- *Set Default* and *Restore Default* only apply if you have added or deleted search fields. For example, if you want the Search dialog box to always open with three search fields, *Add* a field and then click the *Set Default* button. To access these options on a Mac, click on the triangle next to the word *Options* in the Search dialog box.
- *Insert Special* allows you to add a Tab or Carriage return to the search fields.



PRINTING YOUR CITATIONS

To print references directly from EndNote, choose the references you would like to print, choose the style (**Edit** menu, then **Output Styles**, choose **Open Style Manager...** and then select a style) in which you want them to print, then go to the **File** menu and choose **Print**. This command is intended to be a quick way to put your references on paper, so no special page layout options are provided. If you would like to add headers and footers or other page content, use the techniques suggested in the [Creating Independent Bibliographies in Word \(all Versions\)](#) section.

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INSERTING CITATIONS AND GENERATING BIBLIOGRAPHIES IN WORD 2007

EndNote has an “instant formatting” option that allows you to immediately insert and see the style of citations (including in-text citations and the bibliography) as you type your paper. If you prefer, you can turn this off by going to the EndNote Ribbon in Word and clicking on the Preferences icon. In the dialog box, uncheck the *Enable Instant Formatting on new Word documents*.

Note: When EndNote is installed on your computer, an EndNote Ribbon will be added.



If you do not see this additional Ribbon,

1. Go to the Program Files (on your computer) then EndNote X2 folder.
2. Double-click on the *Configure EndNote.EXE* file.
3. Choose *Configure EndNote components for me* and click the *Next* button.
4. Make sure the *Unified Cite While You Write for Microsoft Word* box is checked and click *Next*.
5. Click *Finish* when prompted.


If you still need help, please contact the Exploratory or KNC.

INSERTING CITATIONS INTO YOUR PAPER

The Library from which you want to insert the citation must be open, as well as the document you are working on in Word.

1. If you haven't already done so, choose a style from the **Style** pulldown menu in the EndNote Ribbon in Word or from the **Style** pulldown menu in the Main toolbar of EndNote.
2. In Word, place your cursor where you want to insert your citation.
3. In the EndNote Ribbon, look at the **Citations Group**.
 - a. If you choose **Go to EndNote**, you will go to your EndNote library where you can select your citation (choose more than one by selecting one, holding down the *Control* key (*Apple* key on the Mac), and then selecting the next one).

Go to the **Tools** menu, then **Cite While You Write [CWYW]**, and click on **Insert Selected Citation(s)**. EndNote will insert the selected citation in your Word document, and return to Word.

- b. If you click on the Insert Citation () icon, you will open the Find Citation(s) dialog box. In the search field, enter a word that is relevant to your citation to find possible matches. Select the correct citation and click on the *Insert* button, or double-click on the citation to insert the reference into your Word document.

This is what an EndNote citation looks like (Apollonov, Chugaeva et al. 1988). Below is the bibliography that automatically appears at the end of the document.

Apollonov, M. K., M. N. Chugaeva, et al. (1988). "Batyrbay section, South Kazakhstan, USSR - Potential stratotype for the Cambrian-Ordovician boundary." *Geological Magazine* 125(4): 445.

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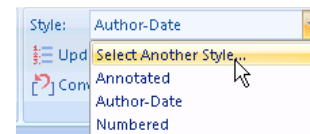
Automatically Creating Citations and Bibliographies with EndNote X3 (13)

A University of Michigan Library Instructional Technology Workshop

CHANGING THE STYLE OF YOUR CITATIONS

You can still change the style of your in-text citations and bibliography even after you've started adding citations to your document. In Word,

1. Go to the EndNote Ribbon, and click on the arrow to the right of the **Style:** icon in the **Bibliography Group**.
2. Choose *Select Another Style...*, and find the correct output style.
3. Click **OK** to exit the dialog box.



Word *should* automatically update your in-text citations and bibliography, but if not, you can always click on the **Update Citations and Bibliography** icon in the **Bibliography Group**.

INSERTING CITATIONS IN THE FOOTNOTE AREA

There are some instances when you need a citation in the footnote area (using Chicago style is a good example). To add a citation in the footnote area,

1. Place your cursor in your text where you want the footnote.
2. Go to the References Ribbon and click on the **Insert Footnote** icon.
3. Now that you are in the footnote area, add any additional text you want, and then insert the citation(s) as described above.

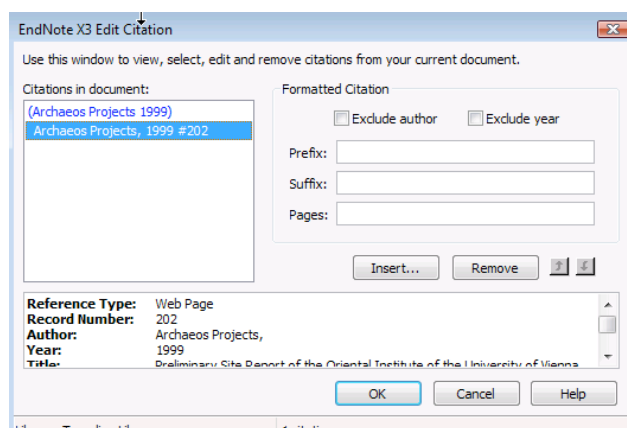
The citation in the footnote will be formatted in accordance with the style you are using, based on the template for one of the following: in-text citation, bibliography, or specific footnote format. To change how the citation in the footnote appears, see the [Editing Styles with EndNote 12](#) handout. Note that you **cannot** edit citations in the footnote area as described below.

EDITING YOUR CITATIONS

To omit the author or year from an in-text citation or to add prefixes or suffixes, go to EndNote Ribbon and click on the **Edit Citation(s)...** icon.

In the resulting dialog box, alter the selected citation, or insert new ones into that same citation (if you need to quote more than one source at the same time). Prefixes and suffixes appear directly before and after the reference. For example, if you put the prefix “See” into the reference (Babcock 1988), you will get (SeeBabcock 1988). So, if you want there to be a space between the prefix or suffix and the reference, you must insert it yourself.

Page numbers will only show up in the citation if that is appropriate for the selected style. You can “override” this by using the *Suffix:* field instead of the *Pages:* field (for example, *p. 32* in the *Suffix:* field).



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CREATING INDEPENDENT BIBLIOGRAPHIES IN WORD (ALL VERSIONS)

EndNote is also capable of creating bibliographies independent of another document. An example of this would be a bibliography of articles that you would hand out to your students or to your dissertation committee. There are two main methods.

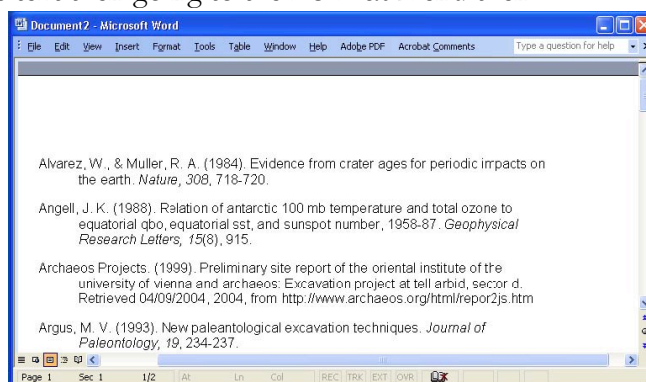
COPY FORMATTED

1. Go to EndNote and select the citations you want to include in the bibliography.
2. Select the appropriate style(s) as discussed above, and then go to the **Edit** menu, and choose **Copy Formatted**.
3. Go to your word processor, and paste the citations into your document. (To paste in Word, go to the **Edit** menu, and select **Paste**.)

The references will be sorted in whatever order is appropriate for the style you've chosen. The font used (by default) in **Copy Formatted** is EndNote's General Display font, which can be changed in the EndNote preferences or in Word when the once you've pasted in the text.

You can change the paragraph spacing by selecting the text then going to the **Format** menu then **Paragraph...**

You can also "drag-and-drop" citations into a Word document to create a bibliography. Select the references and the style you want, and then drag the references from the EndNote library and drop them onto your word processing document (on a PC you will need to hold down the *Control* key as you drag). The font and style will be the same as if you used the **Copy Formatted** command.



Note: Bibliographies created in this way are completely *independent* from EndNote. So, to choose a different style, you would have to go to EndNote, choose a different style, and then use the **Copy Formatted** command again. Similarly, if there is a typo, you would need to fix it in EndNote and your new document.

EXPORTING CITATIONS

You can also **export** from EndNote into Word. Select the references you want and *sort them the way you want them to appear* in the bibliography.

1. In EndNote, go to the **File** menu and **Export...**
2. Choose the location and name for the file.
3. In the *Save as type:* pulldown, choose a file type for the references: *Rich Text Format (RTF*, preserves styles and fonts), *Plain Text* (just the information, not the formatting), *HTML* (keeps the styles and fonts and can be posted on the web/edited in a web editor), or *XML* (Acts similarly to HTML but is more compatible).
4. In the *Output style:* pulldown, choose the appropriate style, and then press the *Save* button.

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