

Introduction to EndNote X7

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Contents

Part 1 : Introduction	3
What is EndNote?	3
How to obtain EndNote	3
EndNote for home use	3
EndNote Basic	4
Part 2 : The EndNote Library	4
An introduction to EndNote libraries	4
Library overview	5
Reference overview	6
Preferences	8
Creating your own EndNote library	9
EndNote Sync	9
Adding references manually	10
Author & editor names	11
Attaching images	12
Part 3 : Importing Records from Databases	13
Importing references from Web of Knowledge	14
Editing records	16
Importing references from EBSCO	17
Automatic import of PDF articles	19
PDF automatic renaming	20
Attaching PDFs manually	21
Importing PDFs to create new records	22
Automatic import of PDFs	24
Annotating PDFs	25
Importing references from Google Scholar	26
Using the online search for book records	27
Part 4 : Organising Your References	30
Using groups	30
Creating a custom group	30
Creating a smart group	32
Creating a group set	33
Duplicate records	34
Part 5 : Cite While You Write	35
Inserting citations & bibliographies into a document	35
Which style to use?	37
Editing citations	38
Direct quotations and page numbers	38
Changing the citation format	40
Adding multiple citations	42
Creating secondary citations	43
Deleting citations	45
Inserting images into your document	45
Exporting a bibliography	47
Electronic submission	48
Part 6 : PowerPoint	49
Part 7 : Getting Help	50

Part 1 : Introduction

What is EndNote?

EndNote is a reference management software package, which is used to manage bibliographies and references when writing theses, essays and articles. The software is available for both PC and Mac.

EndNote allows you to:

- Store all the references that you find during your research. They can be entered manually or downloaded from most databases.
- 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 5,000 styles to choose from.

How to obtain EndNote

EndNote X7 is available on all PCs in the University's open access PC suites.

If you wish to obtain EndNote X7 for a 'personal' University-networked PC in an office or postgraduate room:

- Email its-servicedesk@salford.ac.uk and ask to be put on the **EndNote User Group**.
- You need to tell them your network username and University of Salford email address.
- If you require EndNote for Macintosh include this in your email to ITS Service Desk too.
- You will then be sent instructions on how to download the software onto your computer.
- Note: if you have an earlier version of EndNote you should uninstall it before installing EndNote X7.

EndNote for home use

As a member of Salford University, you are able to purchase a copy of the EndNote software for home use at a substantially discounted price.

- Go to: <http://www.adeptscience.co.uk/a4e/>
- Click the **Login Now** button.
 - If you are using a University of Salford PC you will automatically be recognised as a member of the University.
 - If you are using a PC off-campus (e.g. at home) you can access the store by following the on-screen instructions to select your institution and type in your Athens username and password.
- Choose the option you want (Windows or Mac). It is recommended that you choose a DELIVERY option, rather than one for immediate download. This way you will have the software on a CD, should you wish to install it on another machine.
- Your licence allows you to install EndNote up to three times.

EndNote Basic

EndNote Basic is a Web version of EndNote, which you may prefer to use off-campus. This is a lot less sophisticated than EndNote X7, but it is FREE.

Groups of records can be transferred easily between EndNote X7 and EndNote Basic, 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 Basic to back up your EndNote references. You can also use EndNote Basic to share references and work collaboratively with others. Please see p. 8 for information about EndNote Sync.

For more information please see the separate EndNote Web guide, available at:
<http://www.library.salford.ac.uk/help/userguides/general/endnoteweb.pdf>

Part 2 : The EndNote Library

An introduction to EndNote libraries

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



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. *Custom Groups* are manually created by drag-and-dropping to copy references into a group. *Smart Groups* use search criteria to dynamically update groups as existing references are edited or new references are added to the Library.
- 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.

Library overview

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



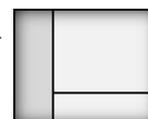
The EndNote Library screen is split into three panes: a **Reference List** pane, a **Groups** pane, and a **Tab** pane.

The screenshot shows the EndNote X7 library interface. The 'Reference List Pane' is the central area displaying a list of references in a table format. The 'Groups Pane' is on the left, showing a tree view of reference groups. The 'Tabs Pane' is on the right, showing tabs for 'Reference', 'Preview', and 'Attached PDF'. A callout box for the Reference List Pane states: '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.' A callout box for the Groups Pane states: '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.' A callout box for the Tabs Pane states: 'The **Tabs** Pane. This includes tabs to three commonly used functions – Reference, Preview and Attached PDF.' A 'Layout' button is visible in the bottom right corner of the interface.

Author	Year	Title
Allen, Glover M.	2004	Bats: biology, behavior, and folklore
AnChiu, C.; Xi...	2008	Flying in silence: Echolocating bats ceas...
Avila-Flores, R...	2004	Ecological, taxonomic, and physiological ...
Bat Conservat...	2008	Bat Conservation International
Binfield, Peter	2008	At PLoS ONE we're batty about bats
Bird, C. D.; Em...	2009	Insightful problem solving and creative t...
Brinklov, S.; K...	2009	Intense echolocation calls from two 'whi...
Chiu, Chen; M...	2007	The role of the external ear in vertical so...
Clayton, N. S.; ...	2009	What do jays know about other minds a...
DeLong, C. M...	2008	Evidence for spatial representation of o...
Emery, N. J.	2006	Cognitive ornithology: The evolution of a...
Emery, N. J.; ...	2009	Tool use and physical cognition in birds ...
Emery, N. J.; S...	2007	Cognitive adaptations of social bonding i...
EUROBATS Se...	2004	EUROBATS: The Agreement on the Cons...
Fraser, O. N.; ...	2011	Ravens reconcile after aggressive conflic...
Funk, M. S.	2002	Problem solving skills in young yellow-cr...
Goto, K.; Wat...	2012	Large-billed crows (<i>Corvus macrorhynch...</i>
Greenhall, Art...	1982	House bat management
Grothe, B.; Pa...	2000	Structure and function of the bat superi...
Hagino, T.; Hir...	2007	Adaptive SONAR sounds by echolocating...
Hartle, D.	2008	Alex & Me: How a scientist and a parrot ...
Holland, Richa...	2008	Bats use magnetite to detect the earth'...
Holzhaider, J. ...	2011	The social structure of New Caledonian c...
Jen, P. H. S.; ...	2008	Echo duration selectivity of the bat varie...
Laudato, Anth...	2010	Bird grooves to the beat
Lefebvre, L.; ...	2008	Brains, lifestyles and cognition: Are ther...
Mason, F.; Si...	2003	Neurobiology of echolocation in bats
k Stat... 2009	2009	Guidelines for conducting bird and bat st...
erg, I... 1999	1999	The Alex studies: Cognitive and commun...

The above layout is recommended if you have a wide-screen monitor.

For a conventional monitor you might prefer a layout like this →



Click the **Layout** button and select **Bottom**.

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,				Journal Article
○	Funk, M. S.	2002	Problem solving skills in young yellow cr...	Animal Cogni...	Journal Article
●	Goto, K.; Wat...	2012	Large-billed crows (<i>Corvus macrorhynch...</i>	Animal Cogni...	Journal Article
○	Greenhall, Art...	1982	House bat management		Government ...
○	Grothe, B.; Pa...	2000	Structure and function of the bat superi...	Microscopy R...	Journal Article

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

The screenshot shows the EndNote X7 interface with a reference record selected. The record details are as follows:

- Reference Type:** Journal Article
- Author:** Goto, K. Watanabe, S.
- Year:** 2012
- Title:** Large-billed crows (*Corvus macrorhynchos*) have retrospective but not prospective metamemory
- Journal:** Animal Cognition
- Volume:** 15
- Issue:** 1
- Pages:** 27-35
- Start Page:** 27
- Epub Date:** [Not specified]
- Added to Library:** 15/03/2013
- Last Updated:** 22/03/2013

The record content includes a thank-you note to Kazuo Fujita, Akio Tanaka, and Ei-Ichi Izawa, mentioning support from the Japan's Ministry of Education, Culture, Sports, author and the Global COE Program (D029) of Keio University.

Research Notes: [Empty field]

URL: <http://link.springer.com/article/10.1007%2Fs10071-011-0428-z>

File Attachments: 442P_1204... (PDF icon)

Author Address: [Empty field]

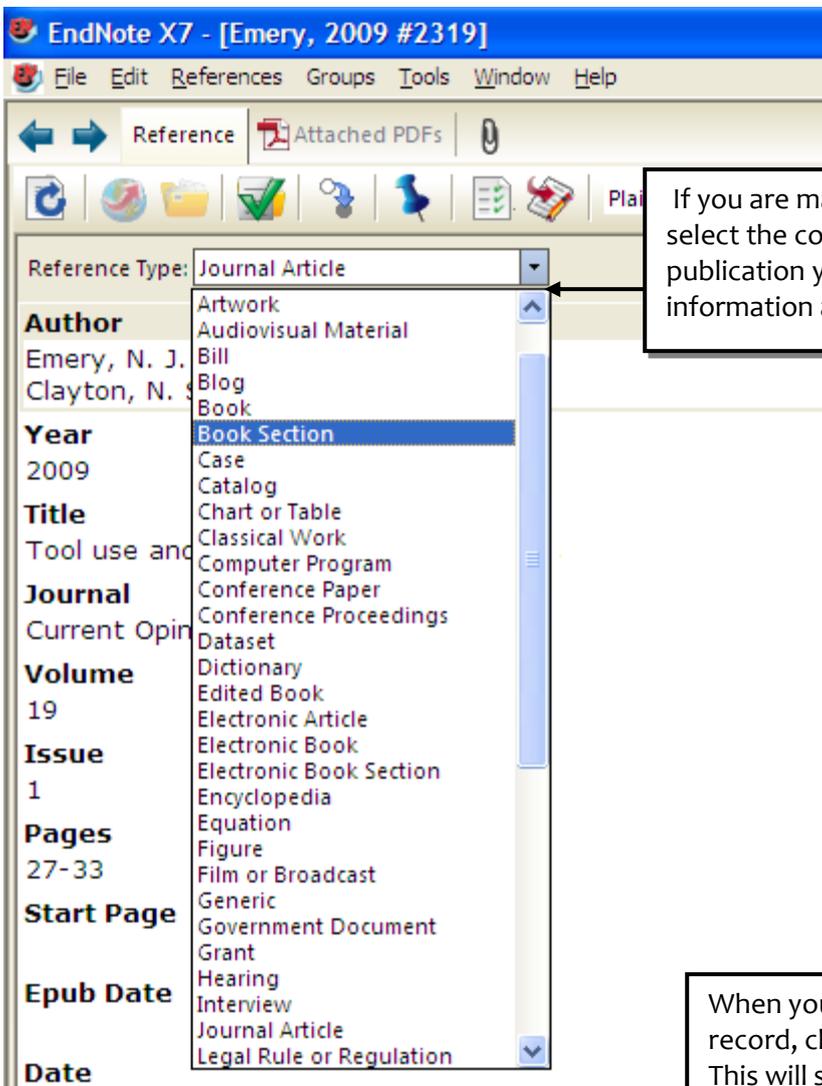
Added to Library: 15/03/2013

Last Updated: 25/06/2013

Layout: [Dropdown menu]

Annotations in the image provide the following instructions:

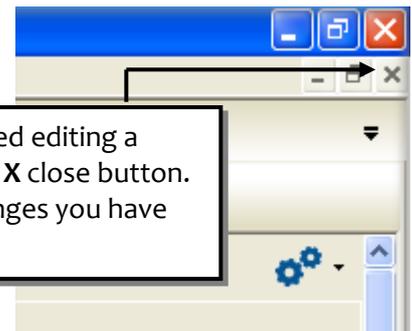
- Font and Size:** The font and size should both be set as **Plain**, unless you need a special style for a character. You do NOT need to set italics or bold; EndNote will do this for you.
- Aa Button:** Use the **Aa** button if you need to change case – for example, for titles imported all in capitals.
- Options Button:** Use the **Options** button to hide or display empty fields in the record, and display the Ratings tool.
- Numbering:** 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.
- 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.



If you are manually inputting references, you need to select the correct **Reference Type** for the type of publication you are citing. This will ensure the correct information and format appears in your bibliography.

EndNote X7 has fifty predefined Reference Types to choose from.

Records imported automatically from databases will usually have the correct Reference Type selected, but occasionally you will need to change it to achieve a better citation.



When you have finished editing a record, click the small **X** close button. This will save any changes you have made to it.

EndNote has some features to help with your information management.

When you import records into EndNote they will be displayed in **bold** (unread). 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.

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

Status	Author	Year	Title	Rating	Ref Type
<input type="radio"/>	DeLong, C. M....	2008	What do jays know about other minds ...		Book Section
<input checked="" type="radio"/>	Emery, N. J.	2006	Evidence for spatial representation of o...	★ ★ ★	Journal Article
<input checked="" type="radio"/>	Emery, N. J.; ...	2009	Cognitive ornithology: The evolution o...	★ ★ ★	Journal Arti...
<input checked="" type="radio"/>	Emery, N. J.; ...	2007	Tool use and physical cognition in bird...	★	Journal Arti...
<input checked="" type="radio"/>	EUROBATS S...	2007	Cognitive adaptations of social bondin...	★	Journal Arti...
<input checked="" type="radio"/>	EUROBATS S...	2004	EUROBATS: The Agreement on the Co...		Web Page
<input checked="" type="radio"/>	Fraser, O. N.;...	2011	Ravens reconcile after aggressive con...	★ ★	Journal Arti...
<input type="radio"/>	Funk, M. S.	2002	Problem		
<input type="radio"/>	Goto, K.; Wat...	2012	Large-bil		
<input type="radio"/>	Greenhall, Art...	1982	House ba		

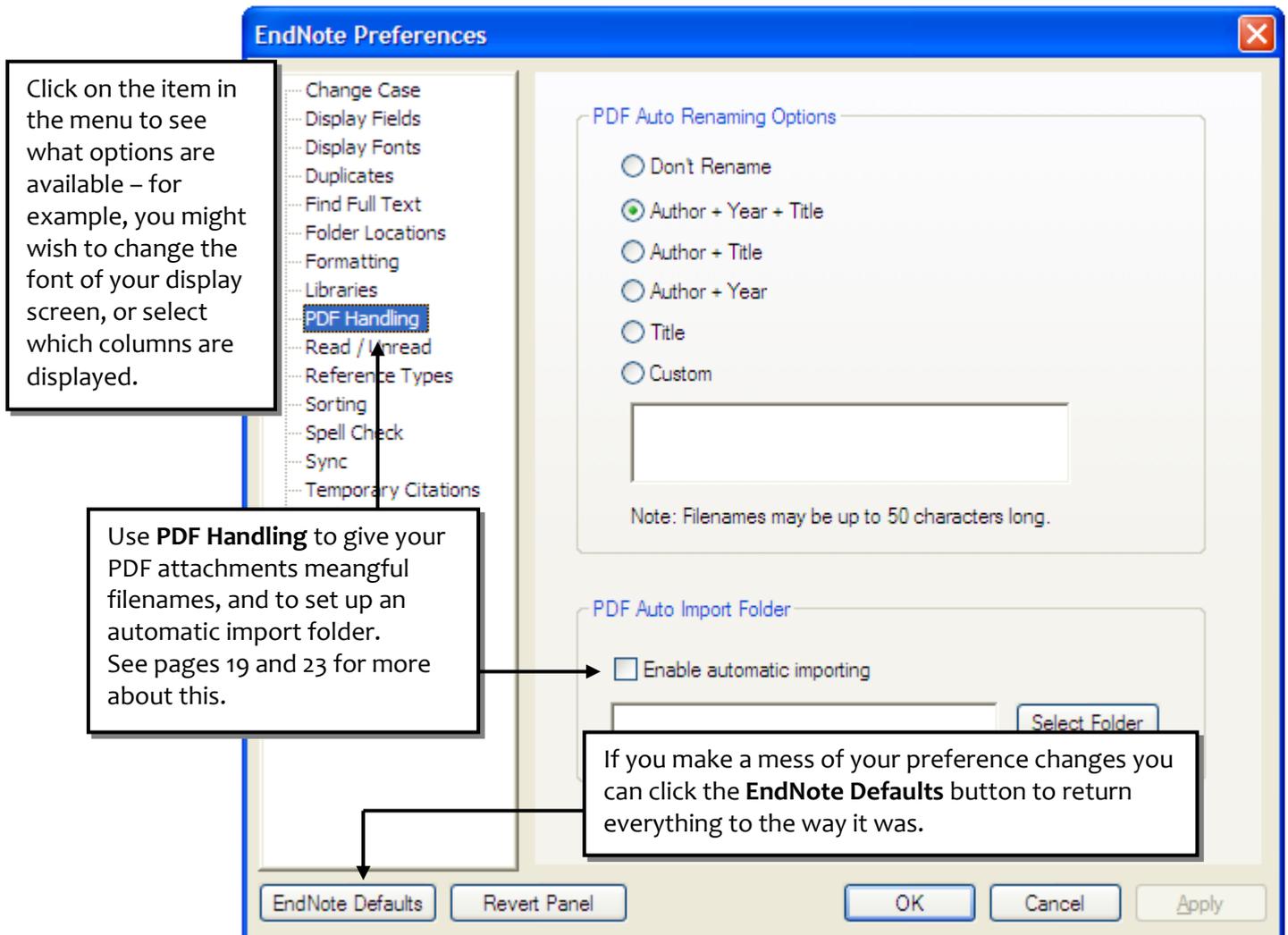
The paperclip indicates that a file has been attached to the record.

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 (see p. 5).

Preferences

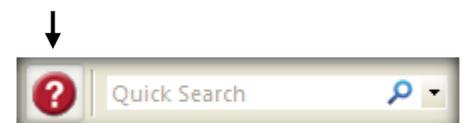
There are number of ways you can customise EndNote to suit your own needs.

Go to the **Edit** menu and select **Preferences**.



To find out more about the options available to you go to EndNote Help:

- Select **Preferences, Toolbars & Shortcuts** from the menu,
- then **EndNote Preferences**.



Creating your own EndNote library

- Go to the **File** menu and select **New**.
- Give your Library a name and save it to your F: drive. Note that it must be saved as **EndNote Library (*.enl)**.
- Your new Library will have been created and will open automatically.

EndNote Sync

It is highly recommended that you use EndNote Web (Basic, see p. 3) to make a back-up of your EndNote Library.

Before you start, one of your Libraries (web or software) should be empty – therefore it is a good idea to set this up before you start saving records.

Go to **Preferences** (see p. 7).

The screenshot shows the 'EndNote Preferences' dialog box. The 'Sync' option is selected in the left-hand menu. The main panel is titled 'Synchronize your data with your EndNote Web account. [Learn more](#)'. It contains an 'Enable Sync' button, a section for 'EndNote Web Account Credentials' with fields for 'E-mail Address' (containing 'a.sherwin@salford.ac.uk') and 'Password', and a section for 'Sync this EndNote Library' with a text box containing 'C:\Documents and Settings...' and a checked 'Sync Automatically' checkbox. At the bottom are buttons for 'EndNote Defaults', 'Revert Panel', 'OK', 'Cancel', and 'Apply'. Three callout boxes provide instructions: one points to the 'Enable Sync' button, another points to the 'Sync Automatically' checkbox, and a third points to the 'OK' button.

Click the **Sync** link, then the **Enable Sync** button.

Follow the on-screen instructions to make yourself a EndNote Basic account.

Tick the **Sync Automatically** box, then click the **OK** button.

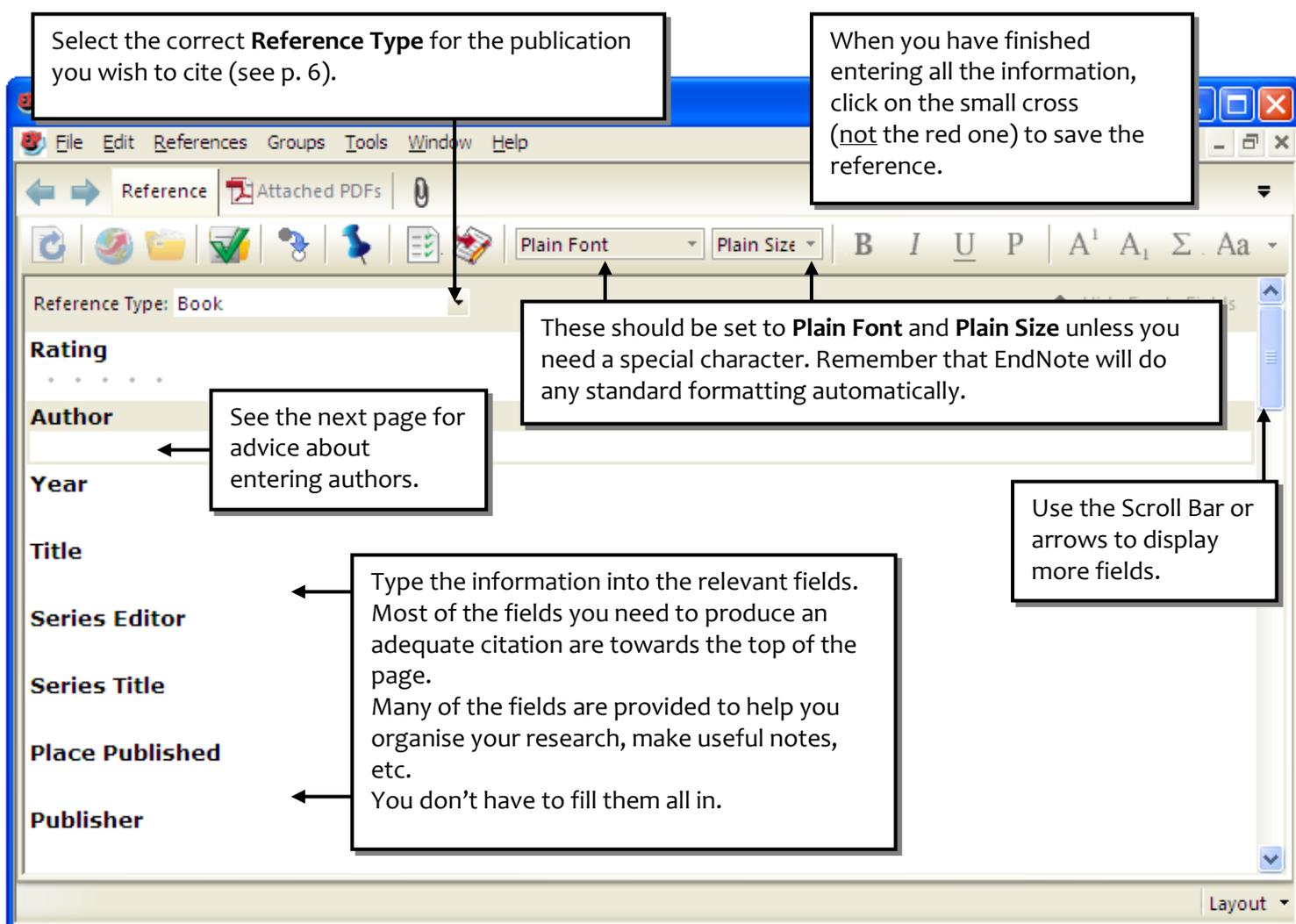
Once you have made an account, enter your email address and EndNote password here.
(If you already have an EndNote Web account you can use that.)

Whenever you close your EndNote Library, all the references in it will be backed up to your Web Library, ready for you to use when you get home – or anywhere else you have internet access. What's more, your references will stay there forever (even after you have left Salford), until you choose to delete them.

Adding references manually

Usually, references will be added to your Library by importing them directly from online databases, but occasionally you will need to make a manual record – for example, for a webpage, blog or unpublished report which doesn't have an electronic record for it.

Sometimes, you will also need to edit records that you have imported from databases.



Author & editor names

When you have more than one author or editor, each of their names should be typed on a separate line, i.e. press the <Enter> key after each name.

Author

Porter, Carolyn
Rymer, Paul D.
Rossetto, Maurizio

Personal authors & editors

- Author names should be entered with the last name followed by a comma and the first name (or initials), e.g. *Smith, John* or *de Gaulle, Charles*
- You must type capital letters where required, e.g. *Smith, John* (not *smith, john*) or *van der Voordt, Theo*
EndNote cannot guess where capital letters are or are not used in names.
- If you are entering initials instead of full names, be sure to type a full stop or a space between initials, (for example "Fisher, J.O." or "J O Fisher"), otherwise EndNote interprets the initials as a single name: "Jo."
- Wherever possible, use full names.

Corporate authors

- When entering corporate authors (companies, institutions, organisations, etc.), put a comma after the name, for example:
University of Salford,
- This ensures it will be correctly formatted by EndNote.
- If your corporate author name includes a comma in the name itself, use two commas in place of the first comma, for example:
Institute for Social Research,, University of Salford

Anonymous works

- If a reference has no author, you should leave the Author field blank. Do not enter "Anonymous." The style that you use to format the bibliography determines how anonymous references are treated.
- Note that if a work is published with "Anonymous" printed on the title page, most style guides request that "Anonymous" be entered as though it were the author name – in which case you should type *Anonymous* into the author field.

Using *et al.*, etc.

- Enter all author names for a particular reference. EndNote will truncate the list of authors with "et al." or "and others" as required by the citation style you have chosen.
- If you do not know all of the authors' names, then the last author should be "et al." or "and others" followed by a comma, e.g. *et al.,*

New entries for Authors, Editors, Journal Titles and Keywords will appear in red. EndNote has an auto-complete function which will complete the typing the next time you use that author, etc.

Attaching images

EndNote allows you to embed images, figures, tables, charts, etc. into your references. This is a useful way to store any graphic material you find in the course of your research.

You can insert a graphic file into the Figure field of any EndNote reference. So, while a reference to a journal may contain primarily bibliographic information, you can also include an illustration that appeared with the journal article.

The *Figure*, *Chart or Table*, and *Equation* reference types can be used specifically to catalogue images and files, and may contain minimal reference information. EndNote can then be used to insert figures and format a list of figures (if appropriate) in your paper.

The screenshot shows the EndNote interface. At the top, there is a toolbar with icons for navigation and actions. A callout box points to the drawing pin icon, stating: "Open the record you wish to use, then click the **Attach Figure** (drawing pin) icon." Below the toolbar, a reference record is displayed with fields for Rating, Author (Faragher, John D.), Year (1986), Title (Effects of cold storage r...), Journal (Scientia Horticulturae), and Volume (29). Overlaid on this is the "Attach Figure" dialog box. It has a "File name:" field with a "Choose File..." button. A callout box points to this button, stating: "Click the **Choose File** button and browse to where you have the image saved." Below the file name field is a "Note:" section with a small icon and text: "The 'Attach Figure' feature enables the attachment of images, charts, and tables into the 'Figure' field for later citing using EndNote CWYW." At the bottom of the dialog are "OK" and "Cancel" buttons. A callout box points to the "OK" button, stating: "Click the **OK** button."

The screenshot shows a reference record with a "Figure" field containing a photograph of a red Telopea speciosissima flower. Below the image is a "Caption" field with the text "Telopea speciosissima (Source: ANBG, 2012)". A callout box points to the image, stating: "Scroll down the reference screen to see your image. Double-click on it to see the full-sized image." Another callout box points to the caption, stating: "Add a caption to describe the image."

Remember that if you are using images in your writing you must provide a caption for each one, and this must include a citation for the source of the image (as in the above illustration). You can find out more about this in the guide "Referencing Images" which is available on the Library's website at:

<http://www.salford.ac.uk/library/help/userguides>

Part 3 : Importing Records from Databases

When you search databases to find journal articles, books and other information it is usually possible to import the records you find directly into EndNote. This has the advantage of allowing you to import references accurately without having to re-type all the information yourself.

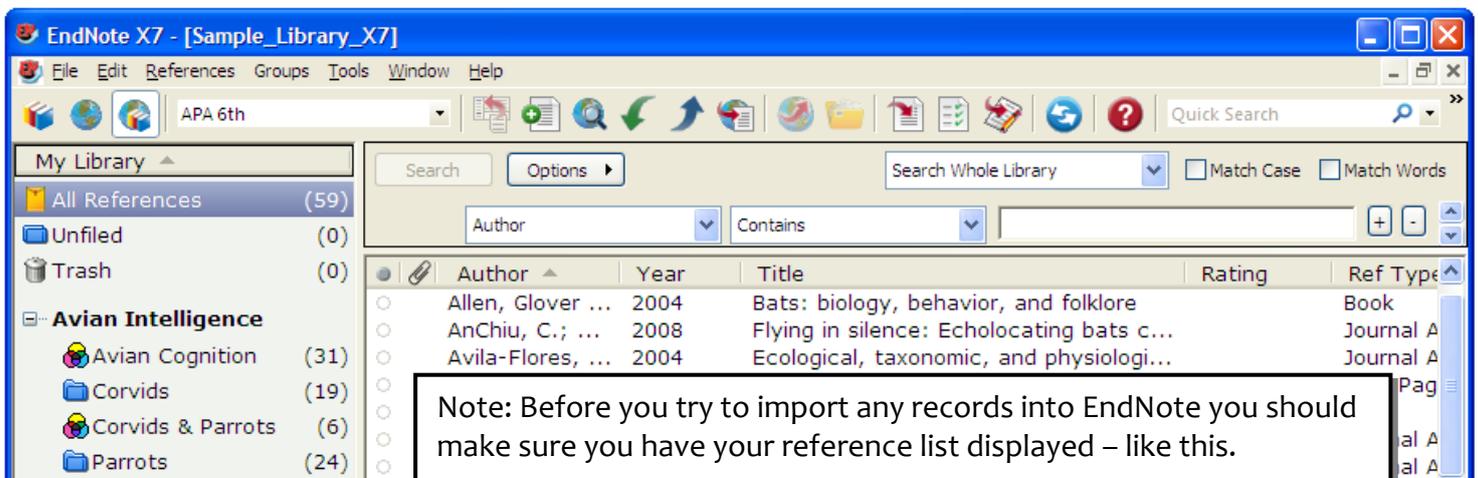
Most databases contain a *download* or *export* button that will send your search results directly to EndNote, pick the correct import option, and start the import process automatically. All you need to do is choose the EndNote library into which the data should be imported.

In a few databases importing records is a two-step process where you save the results of your search into a file, then import that file into your EndNote library using an *Import Filter*.

For instructions about how to import records into EndNote from the databases provided by the Library, please see the separate guide: “*Instructions for Downloading from Databases into EndNote*”, available at:

<http://www.library.salford.ac.uk/training/workbooks/endnotedwnld.pdf>

Please note that with some databases it is not possible to import references automatically into EndNote. In these cases you will need to either type the information in manually or copy and paste it into the appropriate reference form, following the instructions on pages 9 & 10 of this guide.



Close any references you have open.

Importing references from Web of Knowledge

1. Open Internet Explorer, go to the Student Channel and click the **SOLAR Library Search** link.
2. Click the **Databases** link, then the letter **W**, then the **Web of Knowledge** link.

All Databases

Search

"leucadendron salignum" in

Example: oil spill mediterranean*

3. Type in your keywords and click the **Search** button.

4. At the results screen, tick some of the checkboxes next to the results you want.

- 31. Title: **COMPARISON OF CARBON SEQUESTRATION BETWEEN MONOCULTURE AGROFORESTRY SYSTEMS OF MELAL**
Author(s): Budiadi; Ishii, H. T.
Source: JOURNAL OF TROPICAL FOREST SCIENCE Volume: 2
Times Cited: 0 (from All Databases)
[FIND IT](#) [[View abstract](#)]
- 32. Title: **Does phosphate acquisition constrain legume p**
Author(s): Power, Simon C.; Cramer, Michael D.; Verboom, G. .
Source: PLANT AND SOIL Volume: 334 Issue: 1-2 Pages: 3:
Times Cited: 4 (from All Databases)
[FIND IT](#) [[View abstract](#)]
- 33. Title: **Use of multinodal explants for micropropagation**
Author(s): Suarez, E.; Perez-Frances, J. F.; Rodriguez-Perez, .
Source: SPANISH JOURNAL OF AGRICULTURAL RESEARCH
Times Cited: 0 (from All Databases)
[FIND IT](#) [[View abstract](#)]

Output Records

Step 1: Select records.

- Selected Records on page
- All records on page
- Records to

Step 2: Select content.

- Authors, Title, Source
- Abstract

Step 3: Select destination. [\[Learn about saving to bibliographic software\]](#)

Save to:

Save to other Reference Software

(3)

5. Scroll down to the bottom of the page.

6. Tick the **plus Abstract** box.

7. Click the **EndNote** button.

Web of Knowledge [5.3] - Export Transfer Service

To help protect your security, Internet Explorer blocked this site from downloading files to your computer. Click here for options...

WEB OF KNOWLEDGE™ DISCOVERY STARTS HERE

THOMSON REUTERS

Sign In | Marked List (0) | My EndNote Web | Help

Processing Records

Please wait while your request is processed.
(Note: Depending on the number of records, this may take some time.)

Product: Web of Knowledge
Selected action: Export to Reference Software
Processing 6 records:
6...Done.

Export If the "Export" process does not start automatically, then click "Export."

Back to Results When you are done exporting the file, click "Back to Results."

8. Depending on the security settings of your PC, you may see a message like this. If you do, right-click on it and select **Download File**.

If you do not already have your EndNote library open you will be asked to select the library you want to use.

EndNote X7 - [My EndNote Library]

File Edit References Groups Tools Window Help

APA 6th

My Library

- All References (602)
- Imported References (6)
- Sync Status...
- Unfiled (477)
- Trash (2)

Search Options Search Whole Library Match Case Match Words

Author Contains

Author	Year	Title
Suarez, E.; ...	2010	Use of multinodal explants for micropropagation of Leu...
Power, Sim...	2010	Does phosphate acquisition constrain legume persiste...
Harris, Mar...	2010	Canopy seed storage is associated with sexual dimorp...

9. Return to your EndNote library. Note that the references you have just downloaded are in a Group called **Imported References**.

EndNote X7 - [Harris, 2010 #1877]

File Edit References Groups Tools Window Help

Reference Attached PDFs

Plain Font Plain Size B

Reference Type: Journal Article

Rating

.....

Author
Harris, Mark S.
Pannell, John R.

Year
2010

Title
Canopy seed storage is associated with sexual dimorphism in the woody dioeci

Journal
Journal of Ecology

Volume
98

Issue
2

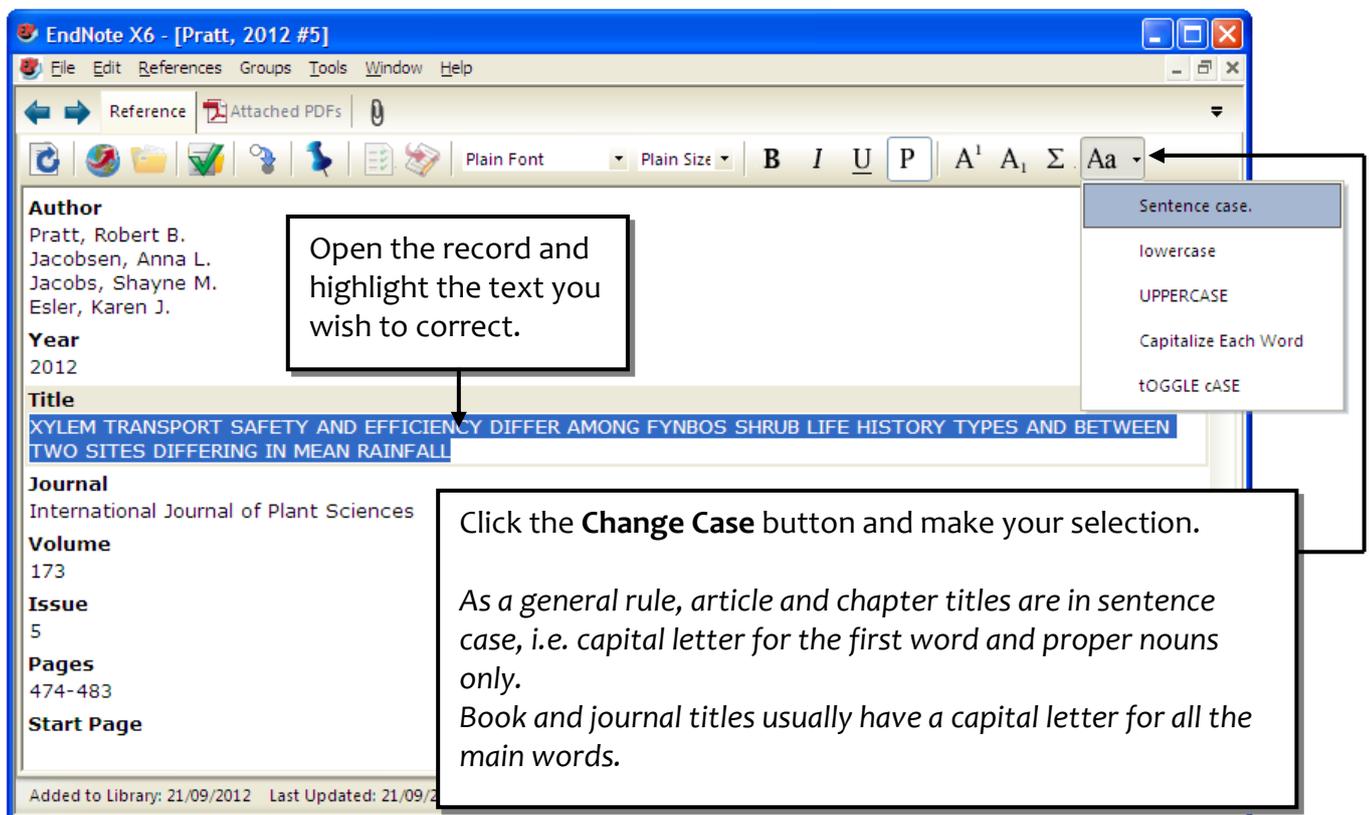
10. Open one of the records to see the information that has been imported.

It is always a good idea to open each reference and check that the information has been imported correctly, while you still have the database open. This will make it easier to correct errors immediately.

Editing records

Sometimes the records you import will have titles all in capital letters, or with each word capitalised. This will create incorrectly formatted references in your bibliography, so you will need to edit these records.

Pratt, Robert B., Jacobsen, Anna L., Jacobs, Shayne M., & Esler, Karen J. (2012). XYLEM TRANSPORT SAFETY AND EFFICIENCY DIFFER AMONG FYNBOS SHRUB LIFE HISTORY TYPES AND BETWEEN TWO SITES DIFFERING IN MEAN RAINFALL. *International Journal of Plant Sciences*, 173(5), 474-483. doi: 10.1086/665267



Open the record and highlight the text you wish to correct.

Click the **Change Case** button and make your selection.

As a general rule, article and chapter titles are in sentence case, i.e. capital letter for the first word and proper nouns only.

Book and journal titles usually have a capital letter for all the main words.

The above reference will now be correctly formatted, as such:

Pratt, Robert B., Jacobsen, Anna L., Jacobs, Shayne M., & Esler, Karen J. (2012). Xylem transport safety and efficiency differ among fynbos shrub life history types and between two sites differing in mean rainfall. *International Journal of Plant Sciences*, 173(5), 474-483. doi: 10.1086/665267

Remember to replace capital letters for any proper nouns!

Importing references from EBSCO

- Open Internet Explorer.
- Go to <http://search.ebscohost.com/>



[All other EBSCO databases](#)

Click the **All other EBSCO databases** link.

We subscribe to a number of EBSCO databases which cover different subject areas and include many fulltext articles.
Click the title link for the one you wish to search.

If you're not sure where to start, select **Academic Search Premier**, as this database covers a wide range of subjects.

Academic Search Premier
This multi-disciplinary database provides hundred journals, and searchable cited i

[Title List](#) [More Information](#)

Searching: **Academic Search Premier** | [Choose Databases >](#)

in

AND in

AND in [Add Row](#)

Type in your search terms, then click the **Search** button.

At the results page, click the **Add to folder** link for each of the references you want to save.

Karyotypes in *Leucadendron* (Proteaceae)

By: Hui Liu; Gujun Yan; Fucheng Shan; Sedgley, Ralph. I
394, 8p, 11 Diagrams, 3 Charts; DOI: 10.1111/j.1095-83
Subjects: KARYOTYPES; CHROMOSOMES; CYTOTAXONI

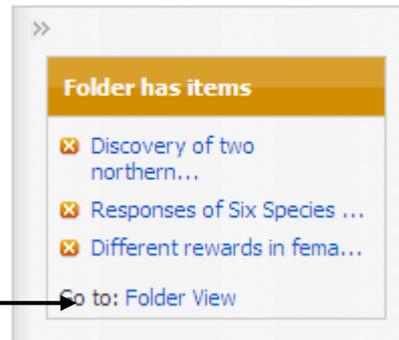
Database: Academic Search Premier

[Show all 14 images](#)

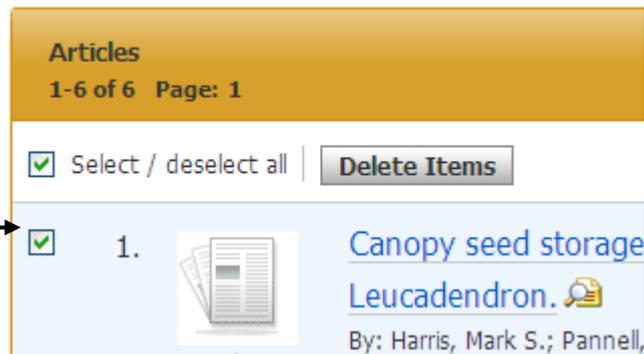
Species of <i>Leucadendron</i>	2n	2n-1	2n-2	2n-3
<i>L. ...</i>	44	43	42	41
<i>L. ...</i>	44	43	42	41
<i>L. ...</i>	44	43	42	41

[Add to folder](#) | Relevancy:

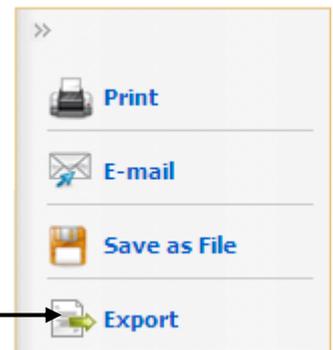
When you have finished making your selection, scroll up to the top of the page and click the **Folder View** link (on the right-hand side of the screen).



Click the **Select** box, so that all the records are ticked.



Click the **Export** icon.



Click the **Direct Export to EndNote, ProCite ...** button, then click the **Save** button.

Save citations to a file formatted for:

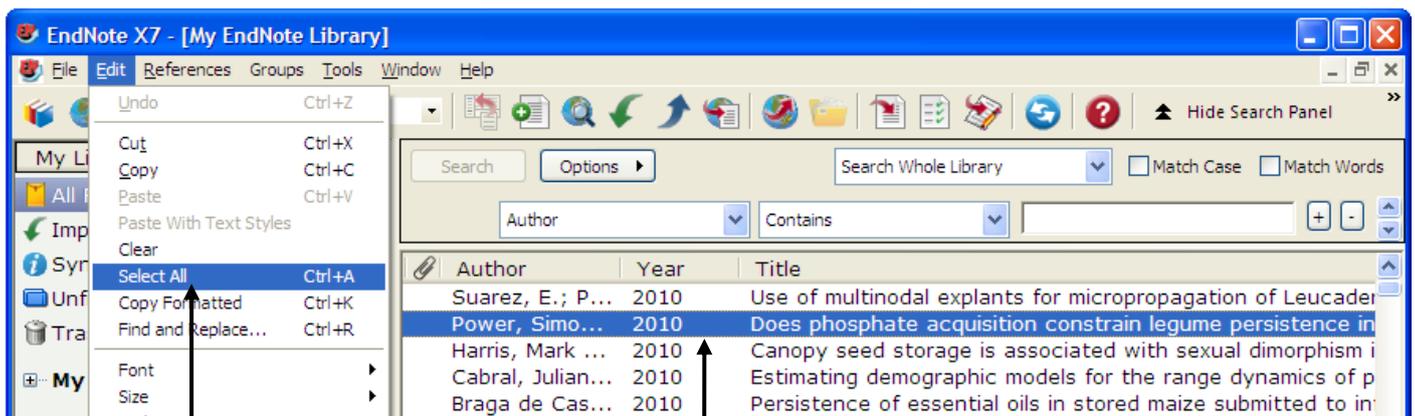
- Direct Export to EndNote, ProCite, CITAVI, or Reference Manager
- Direct Export to EndNote Web
- Generic bibliographic management software
- Citations in XML format
- Citations in BibTeX format
- Citations in MARC21 format
- Direct Export to RefWorks

Remember to check that the information that you have just imported into EndNote is correct and complete. If necessary, edit any records according to the instructions on p.16.

Automatic import of PDF articles

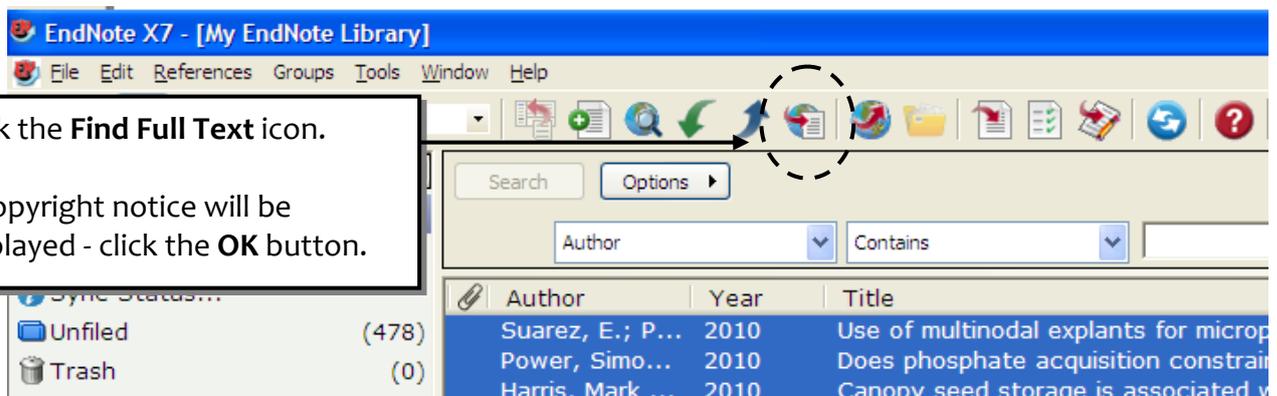
EndNote can locate and import fulltext PDF articles. Select one or more references, a group, or your entire library and have EndNote scan for fulltext available to you. When the fulltext is found, EndNote downloads it and links it to the appropriate reference automatically.

Please note that the success of this facility will depend on which database you got the references from, and whether we have access to the fulltext articles. It will also be more successful when you are using a University-network PC, as the system will recognise that you are entitled to fulltext access.



Click on one of the items in the Reference List area, so that it is highlighted, then go to the **Edit** menu and choose **Select All**. This will highlight all the references in the list.

Alternatively, you can select individual records by holding down the <Ctrl> key while you click on them.



If the download has been successful you will see a paperclip icon in the Reference List, which indicates there is a file attached.

If EndNote is unable to attach the PDF file it will attempt to find and attach URLs to your records. These can be used to return to the fulltext article on the database where it was found.

	Author	Year	Title
	Tansley, S. ...	2000	RAPD variation in
	Liu, H.; Yan,...	2006	Interspecific hybr
	Hui, Liu; Guij...	2006	Karyotypes in Leu
	Hemborg, Ås...	2005	Different rewards
	Harris, Mark ...	2010	Canopy seed stor
	Dobrowolski, ...	2008	Selection for deci
	Power, Simo...	2010	Does phosphate :
	Welsford, M....	2013	How many pollina

To read the PDF file click so its record his highlighted, then click the **Open File** icon (yellow folder). This will open the attachment in a new window.

The screenshot shows the EndNote search results interface. At the top, there is a toolbar with various icons, including a yellow folder icon representing 'Open File', which is circled with a dashed line. Below the toolbar is a search bar with 'Author' selected and 'Contains' as the search criteria. The search results table is displayed below, with the second row highlighted in blue. The table has columns for Author, Year, and Title.

	Author	Year	Title
	Tansley, S. ...	2000	RAPD variation in the rare and endangered Leucadendron eli.
	Liu, H.; Yan,...	2006	Interspecific hybridization in the genus Leucadendron throu.
	Hui, Liu; Guij...	2006	Karyotypes in Leucadendron (Proteaceae): evidence of the

PDF automatic renaming

If you wish, you can set EndNote to rename your PDF files when they are imported, so that they have uniform and meaningful file names.

Go to the **Edit** menu and select **Preferences**.

The screenshot shows the 'EndNote Preferences' dialog box. The 'PDF Handling' option is selected in the left-hand menu. The 'PDF Auto Renaming Options' section is visible, showing several radio button options for renaming PDF files. The 'Author + Year + Title' option is selected.

PDF Auto Renaming Options

- Don't Rename
- Author + Year + Title
- Author + Title
- Author + Year
- Title
- Custom

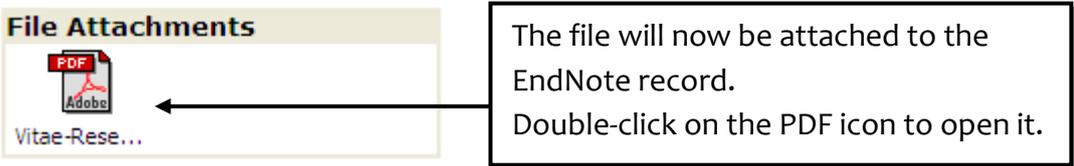
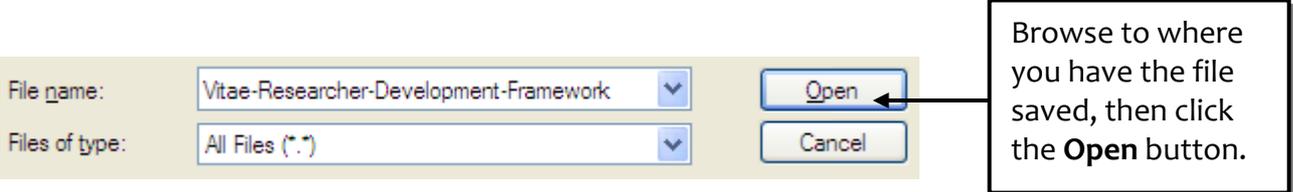
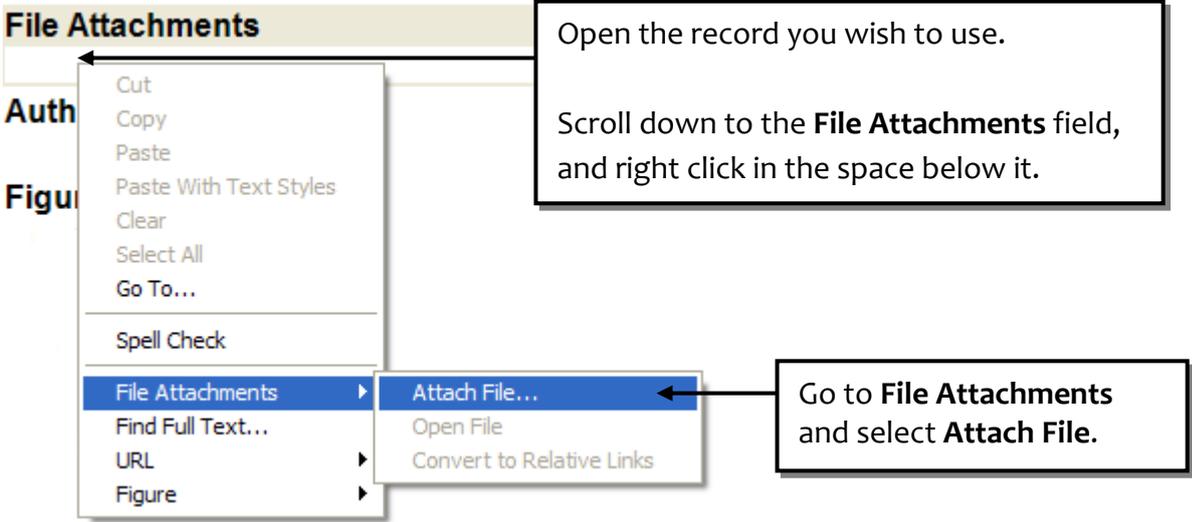
Click **PDF Handling**, then select the option you want for your filenames.
Click the **OK** button.

Wherever possible, EndNote will rename your files in the format you have chosen.

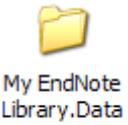
Attaching PDFs manually

If EndNote cannot find and attach the PDF for you automatically (see pp. 18-19) you can save the file then attach it to the reference manually.

Before you start save the file to your PC.



When you insert a PDF file or an image, EndNote copies the file and places the copy in a .DATA folder, which is found in the same folder as the main library file. If you move your library to a different computer, or if you want to share your library with someone, remember to always copy the .DATA folder along with the library.



Importing PDFs to create new records

EndNote allows you to convert existing collections of PDF files into EndNote records, by extracting DOI information from the PDF files, matching it with data from CrossRef (www.crossref.org) and capturing bibliographic content.

Therefore, to work, the article will need to have the DOI number printed on it somewhere.

Current Eye Research, 34, 421–425, 2009
Copyright © Informa Healthcare USA, Inc.
ISSN: 0271-3683 print / 1460-2202 online
DOI: 10.1080/02713680902866972

What is a DOI?

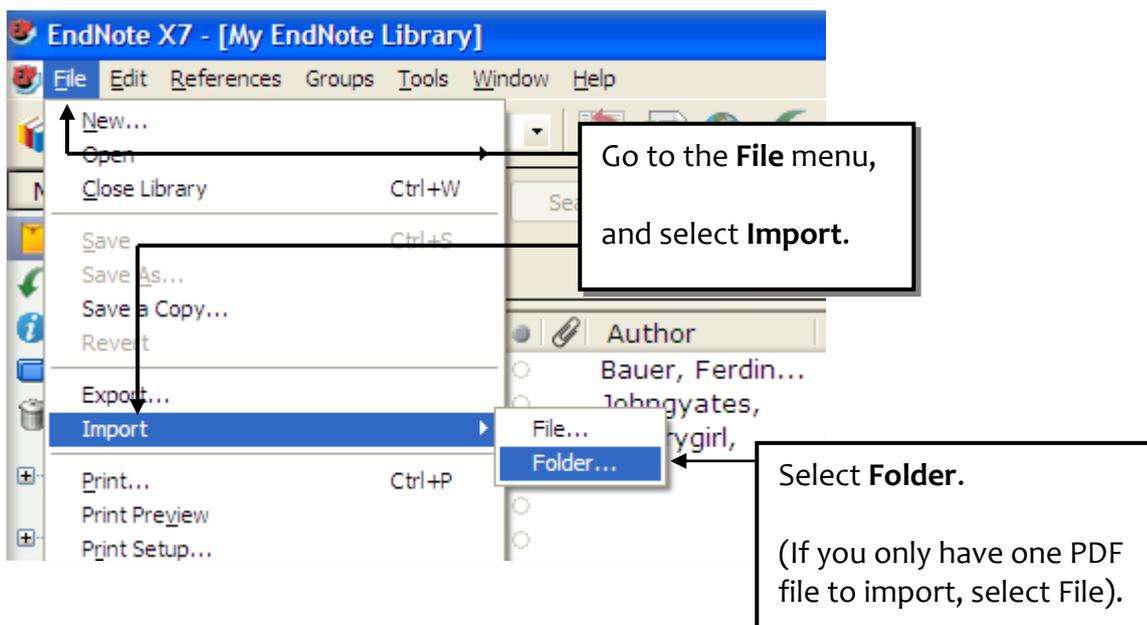
A DOI (Digital Object Identifier) is a unique string of characters used to identify an electronic journal article or (less frequently) an electronic book. Unlike a URL, a DOI is permanent – therefore using a DOI in a bibliographic reference provides a persistent link to the article.

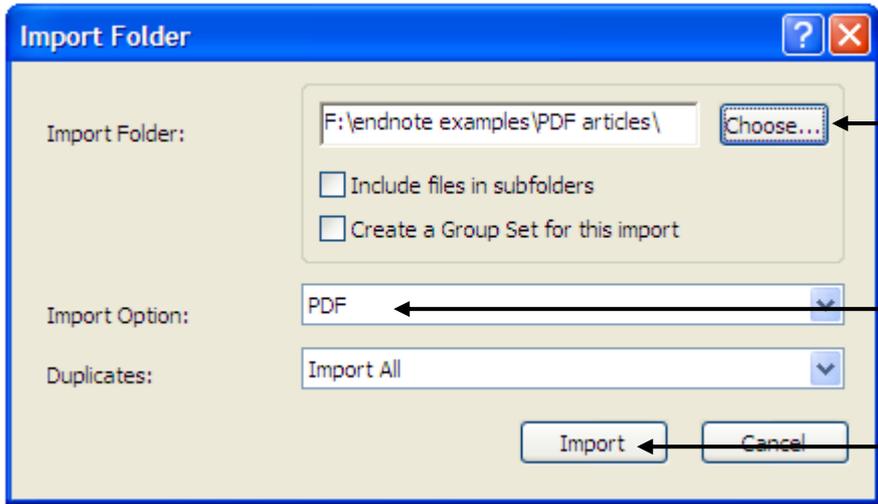
To retrieve an article where you have the DOI, turn it into a URL by preceding the DOI with the following:

<http://dx.doi.org/>

e.g. <http://dx.doi.org/10.1080/02713680902866972>

Before you start you should put your PDF files into a single folder – this will make the importing quicker.



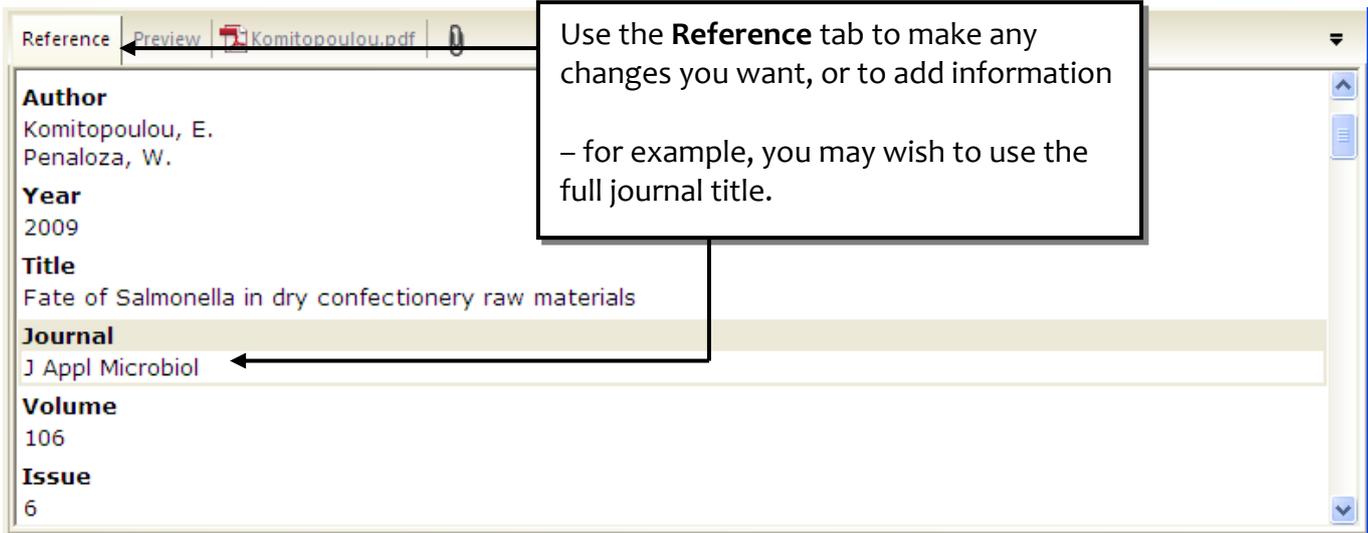


Click the **Choose** button and browse to the folder where you've got your PDF files saved. For this exercise, go to: **F:\endnote examples**

Select **PDF** from the **Import Option** menu (if it is not already selected).
Click the **Import** button.

The PDF files will be imported (you can see this from the paperclip icon) and the records will be created from the information in each file.

	Author	Year	Title	Rating	Journal
●	Wu, D. C.; Mi...	2009	Antimicrobial in vitro evaluation of corneal stora...		Curr Eye Res
●	Visioli, F.; Be...	2009	Chocolate, lifestyle, and health		Crit Rev Foo...
●	Turcotte, Vér...	2009	Utilisation des écailles de cacao comme support ...		Canadian Jo...
●	Komitopoulou...	2009	Fate of Salmonella in dry confectionery raw mat...	· · · · ·	J Appl Micro...
●	Afoakwa, Em...	2009	Comparison of rheological models for determini...		Internationa...



Use the **Reference** tab to make any changes you want, or to add information – for example, you may wish to use the full journal title.

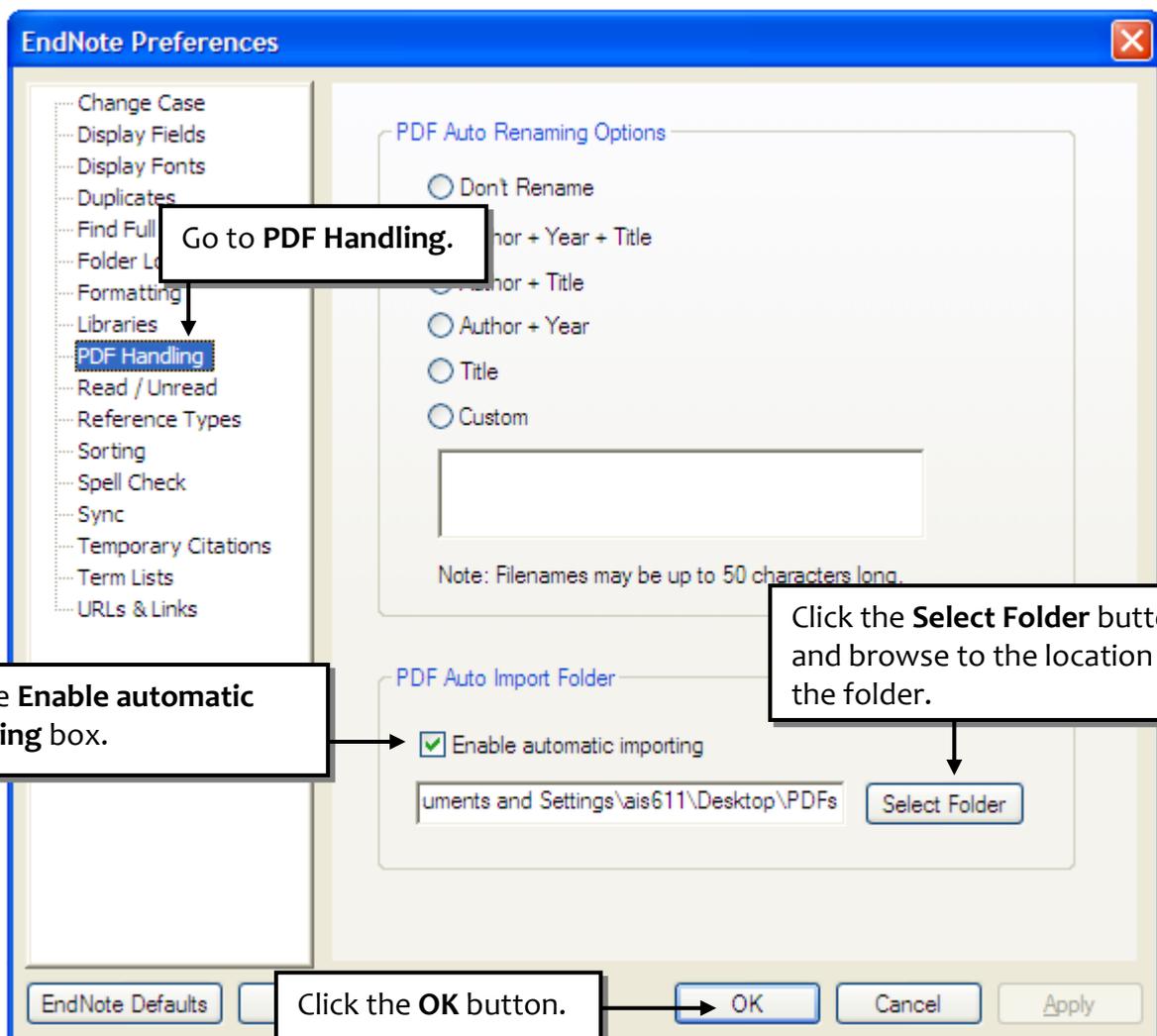
Automatic import of PDFs

EndNote X7 has a new feature which allows you to specify a folder, then whenever you save PDFs into it, they will convert into EndNote records automatically. As described on p. 20, the articles will need to have DOIs printed on them to work correctly.



Make yourself a folder.
When you are searching for articles save the PDF files into this folder.

In EndNote, go to the **Edit** menu and select **Preferences**.



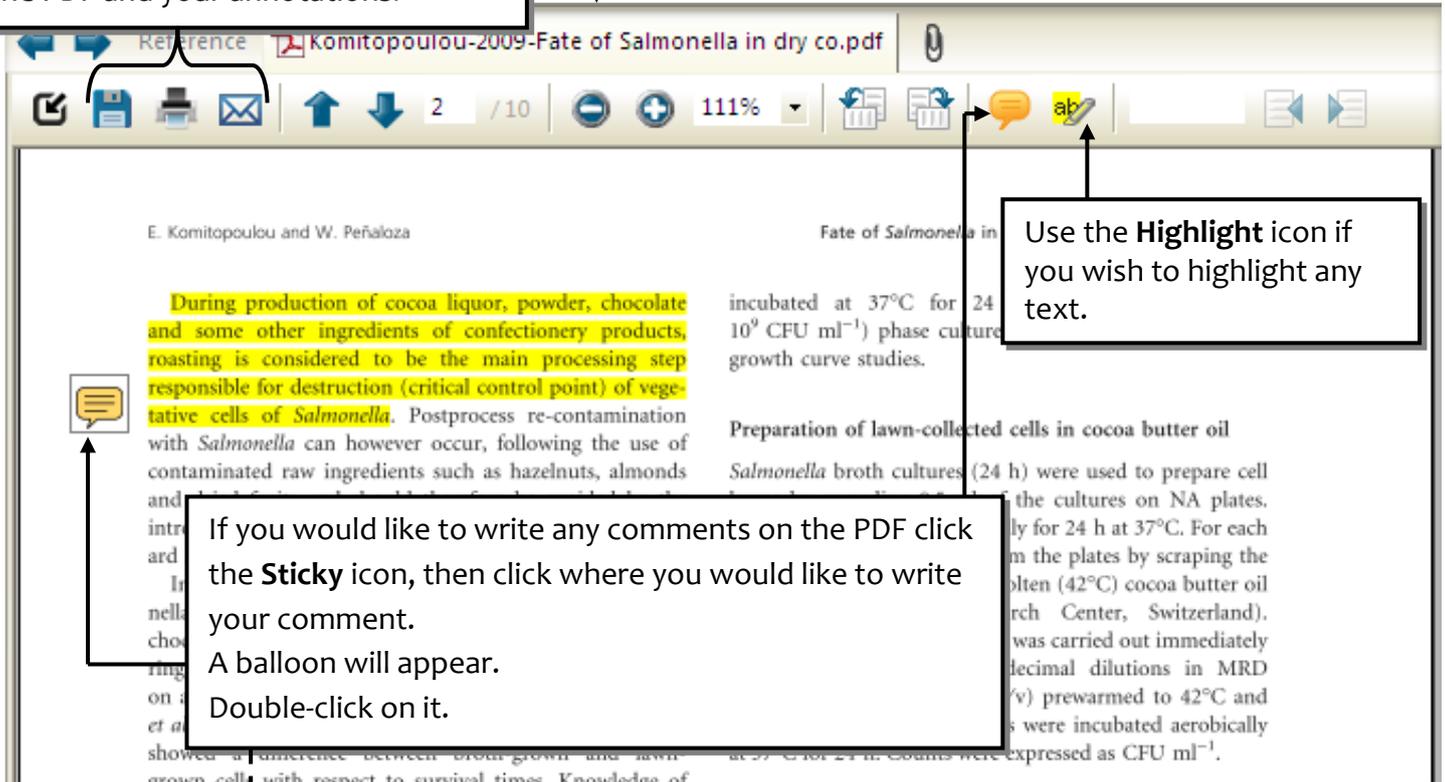
After EndNote runs the import operation, EndNote creates a subfolder called **Import** within your “Auto Import Folder”. This helps you (and EndNote) keep track of what has already been imported into your library.

Annotating PDFs

EndNote allows you to easily view and annotate the PDFs you have attached to your references.

Use these icons to Save, Print or Email the PDF and your annotations.

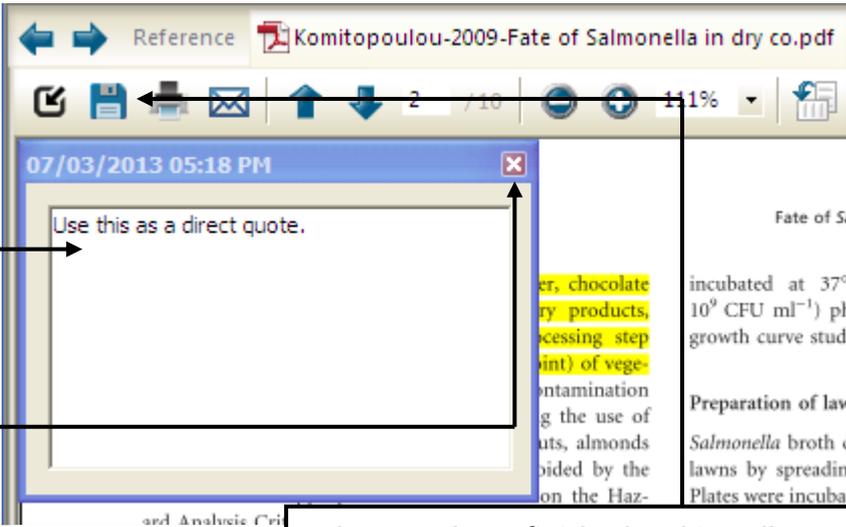
Open the record you want to use, then click the **PDF** tab.



Use the **Highlight** icon if you wish to highlight any text.

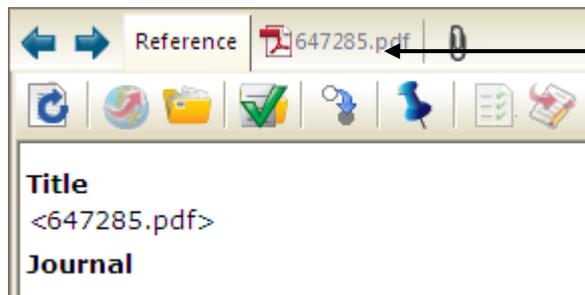
If you would like to write any comments on the PDF click the **Sticky** icon, then click where you would like to write your comment. A balloon will appear. Double-click on it.

This will open a box where you can type your comments. When you have finished click the red cross in the corner to close the comment box.



When you have finished making all your annotations click the **Save** icon to save your changes.

If you import a PDF (see p. 20) that doesn't have a DOI it will create an EndNote reference that looks like this. The file will be attached to the record, but the only information that has been captured will be the filename, which is used as the title.

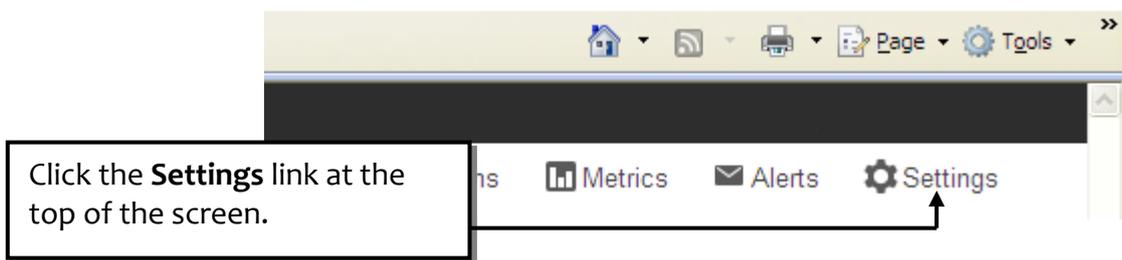


If you want to edit the record, alternate between the PDF tab and the Reference tab to copy and paste the information into the appropriate fields – see pp. 9-10 for more information.

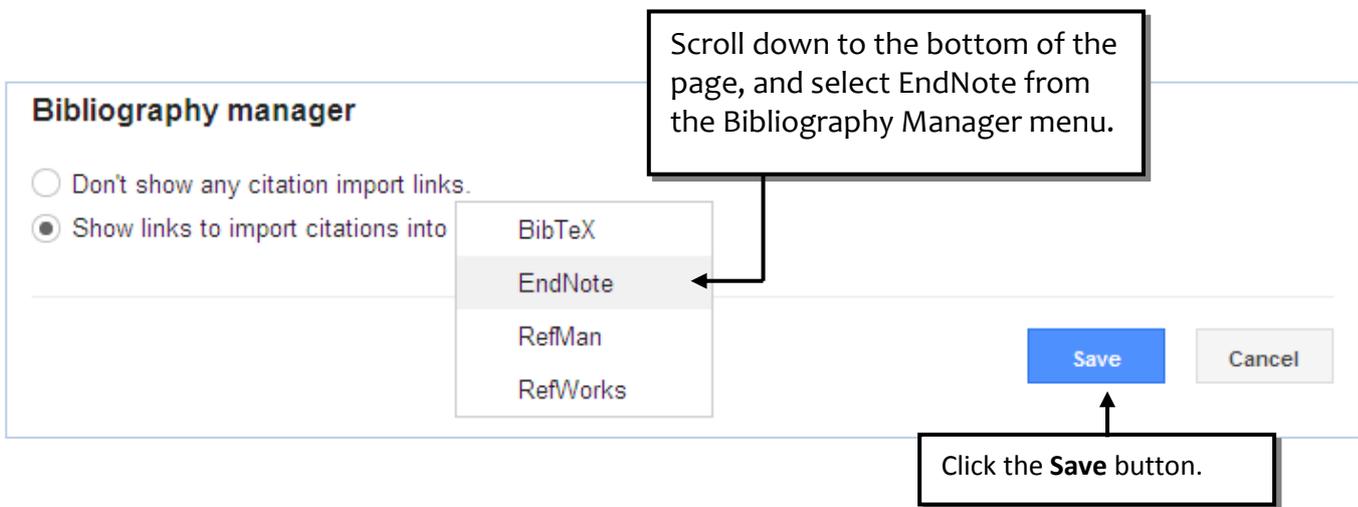
Or you might prefer to search for the record again, and import the reference from a database or Google Scholar.

Importing references from Google Scholar

Open Internet Explorer and go to <http://scholar.google.co.uk/>



Click the **Settings** link at the top of the screen.



Scroll down to the bottom of the page, and select EndNote from the Bibliography Manager menu.

Click the **Save** button.

[A revision of the genus *Leucadendron* \(Proteaceae\)](#)

IJM Williams - Contrib. Bolus Herb, 1972 - kbd.keew.org

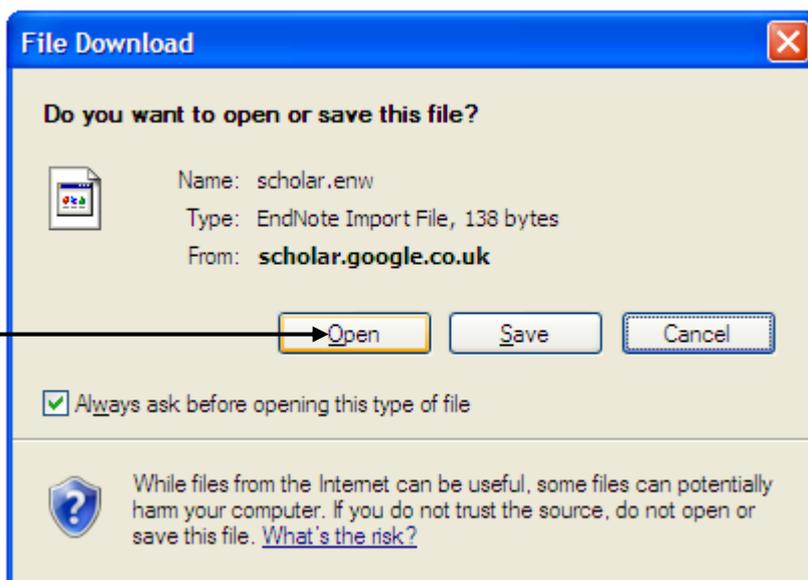
... return to summary results page. Williams IJM. 1972 A revision of the genus *Leucadendron* (Proteaceae). : Contrib. Bolus Herb., no.3.425p. (1972). Illustrations, dot maps; keys Geog=5 Systematics: ANGIOSPERMAE (PROTEACEAE: LEUCADENDRON) (, 197203948). ...

[Cited by 65](#) - [Related articles](#) - [Cached](#) - [All 2 versions](#) - [Import into EndNote](#)

From now on, when you search Google Scholar, there will be an **Import into EndNote** link after each record.

Click this link,

then click the **Open** button.



Remember that Google Scholar is a free resource, and therefore you will not get the same quality of information that you would from a subscribed database. Check the record you have imported and correct any errors or omissions.

Using the online search for book records

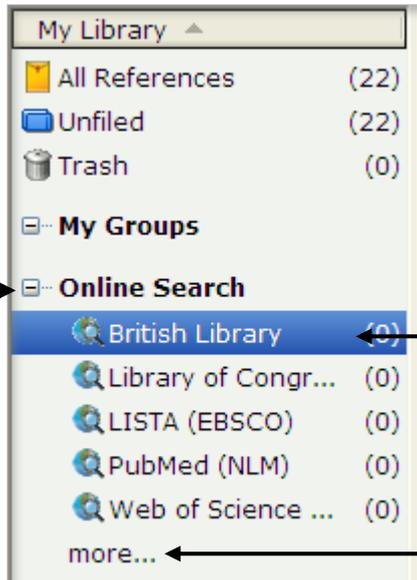
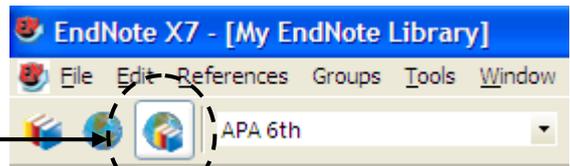
The EndNote *Online Search* function allows you to connect directly with a database, search that database from within EndNote, and retrieve the results directly into EndNote.

Warning

With the majority of databases, this method of finding references does not work: the technology behind the connection files often fails, and even when it does work, the EndNote search form is limited, making it hard to refine your search.

Therefore we do not recommend this method of retrieving records into EndNote. Generally, you will have more success if you search a database through its own search form, and then export the results into EndNote.

If **Online Search** is not already displayed in the Groups panel click the **Integrated Library & Online Search** button.

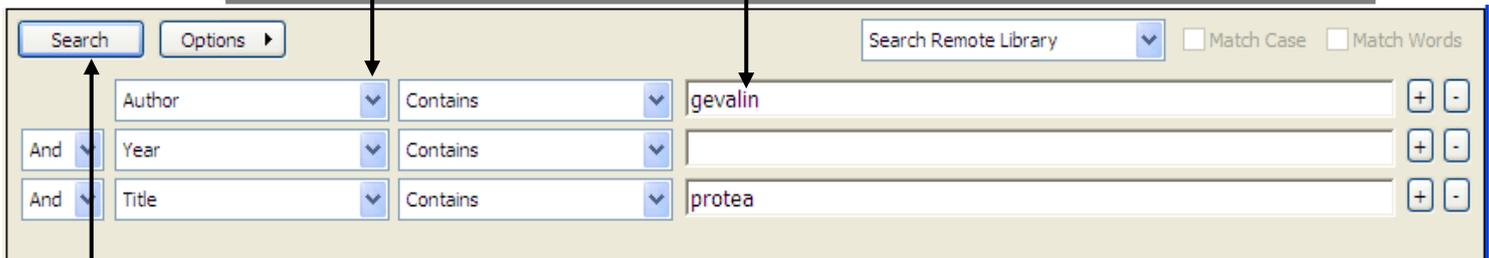


Click the **British Library** link.

If it is not already visible click **more...** and select it from the list.

A search form will open. Type in the details for the book you want.

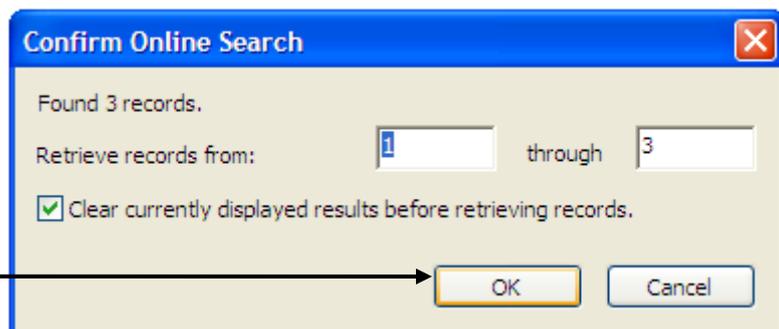
Note: all matching results will be retrieved into EndNote, so your search should be as specific as possible.



Click the **Search** button.

If your search has been successful you will see a box like this.

Click the **OK** button.



The items retrieved from your search will be displayed in the *Reference List* pane.

The screenshot shows the EndNote search interface. At the top, there is a search bar with 'gevalin' and 'protea' entered. Below the search bar, there is a table of results with columns for Author, Year, Title, Rating, Journal, and Ref Type. The results are as follows:

Author	Year	Title	Rating	Journal	Ref Type
Thunberg, Ca...	1781	Dissertatio botanica de Protea, quam ... præ...			Book
Gevalin, Joan...	1781	Resp. Dissertatio botanica protea. Præs. C.			Book
Gevalin, Joan...		Resp. Dissertatio de Protea			Book

A context menu is open over the third record, with the following options: Record Summary..., New Reference, Edit References, Move References to Trash, Add References To, Copy References To, and E-mail Reference. An arrow points from the text box below to the 'Move References to Trash' option.

Click to highlight any of the records that you do not want to keep. Right-click on the highlighted area and select **Move References to Trash**.

You can also use the <Delete> key to delete references.

Any remaining records will be retained in your **All References** folder.

The screenshot shows the 'Confirm Online Search' dialog box. It has a title bar with a close button. The text inside reads: 'Found 207 records.' Below this, there is a label 'Retrieve records from:' followed by a text box containing '1' and the word 'through' followed by a text box containing '207'. Below this is a checkbox labeled 'Clear currently displayed results before retrieving records.' At the bottom, there are two buttons: 'OK' and 'Cancel'.

Note: If your search retrieves too many results you do not have to import them all into EndNote.

Click here and type in a more manageable number, e.g. 20, then click **OK**.

Part 4 : Organising Your References

Using groups

Groups make it easy to break a large library into subsets for later viewing. A group simply points to a subset of references that already exist in the library.

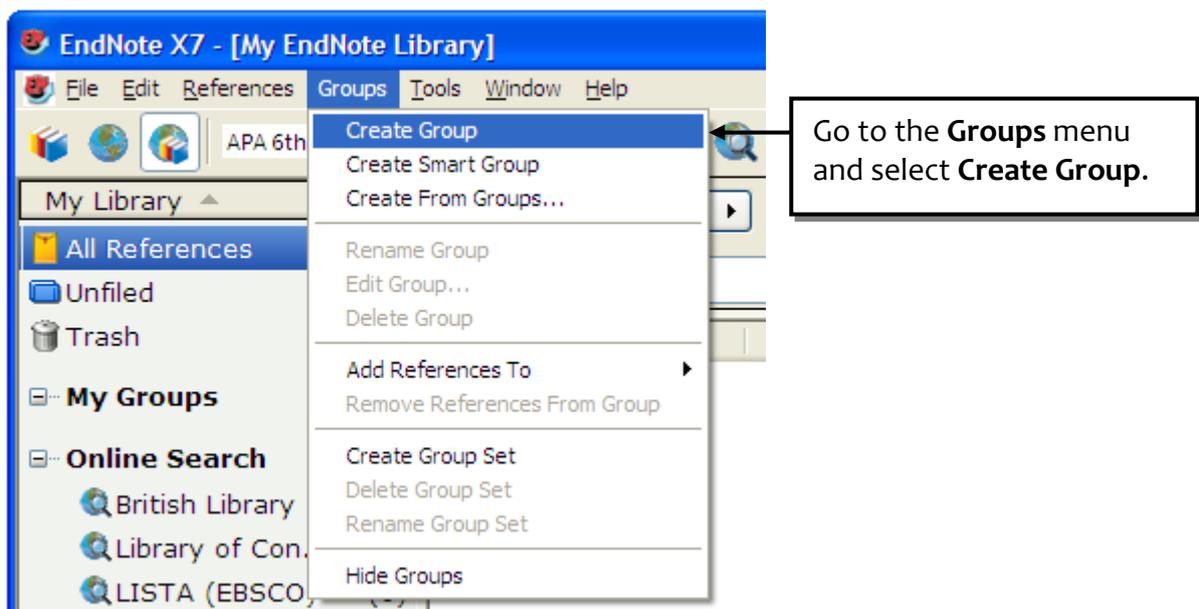
There are several types of groups that make it easy to organise your references in EndNote. Some of these groups are automatically generated and some are ones that you can create yourself. You can further organise your references by storing multiple groups in custom Group Sets.

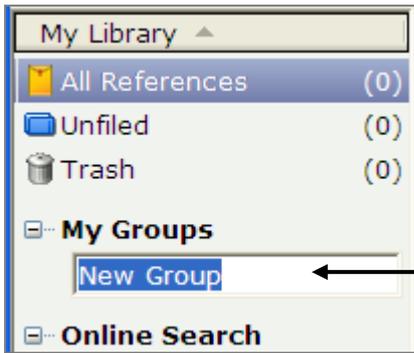
Some things to note about using groups:

- You can create a maximum of 500 Custom Groups and Smart Groups (combined) in a single library.
- A single reference will never appear more than once in a particular group. However, you can add that reference to any number of groups.
- Removing a reference from a *custom group* does not delete it from the *library*. It removes the reference from the group subset, but the reference still exists in the library.
- Deleting a reference from a *library* also deletes it from all *groups* in that library. The reference no longer exists.

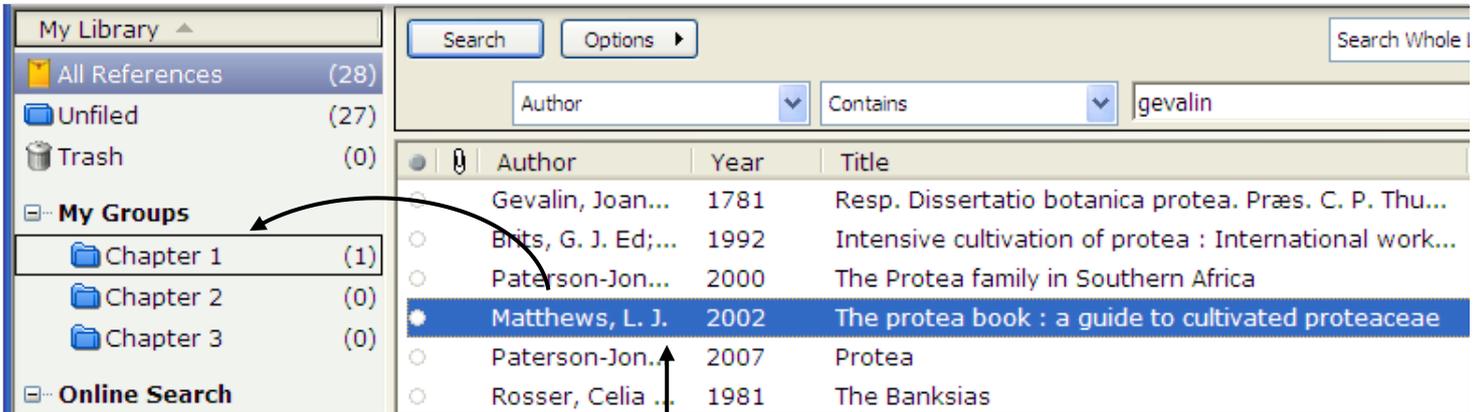
Creating a custom group

You can create custom groups as you wish, in order to organise your references. You might wish to make groups for each chapter of your thesis, or for different papers you are working on.



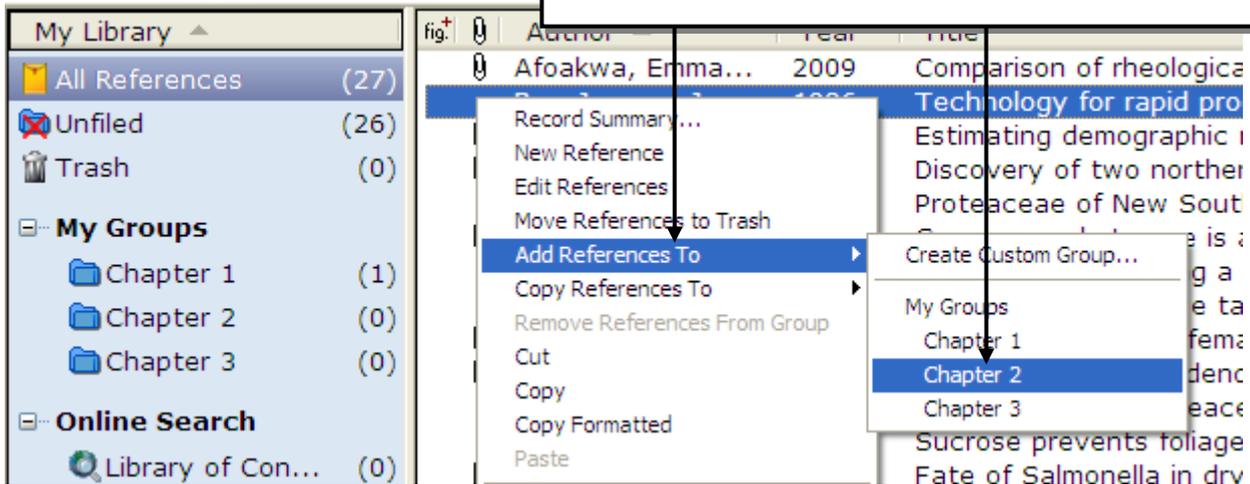


A box will appear in the *Groups* pane.
 Type in a descriptive name for the group you have just made.
 Click away from the box to save the name you have just typed.



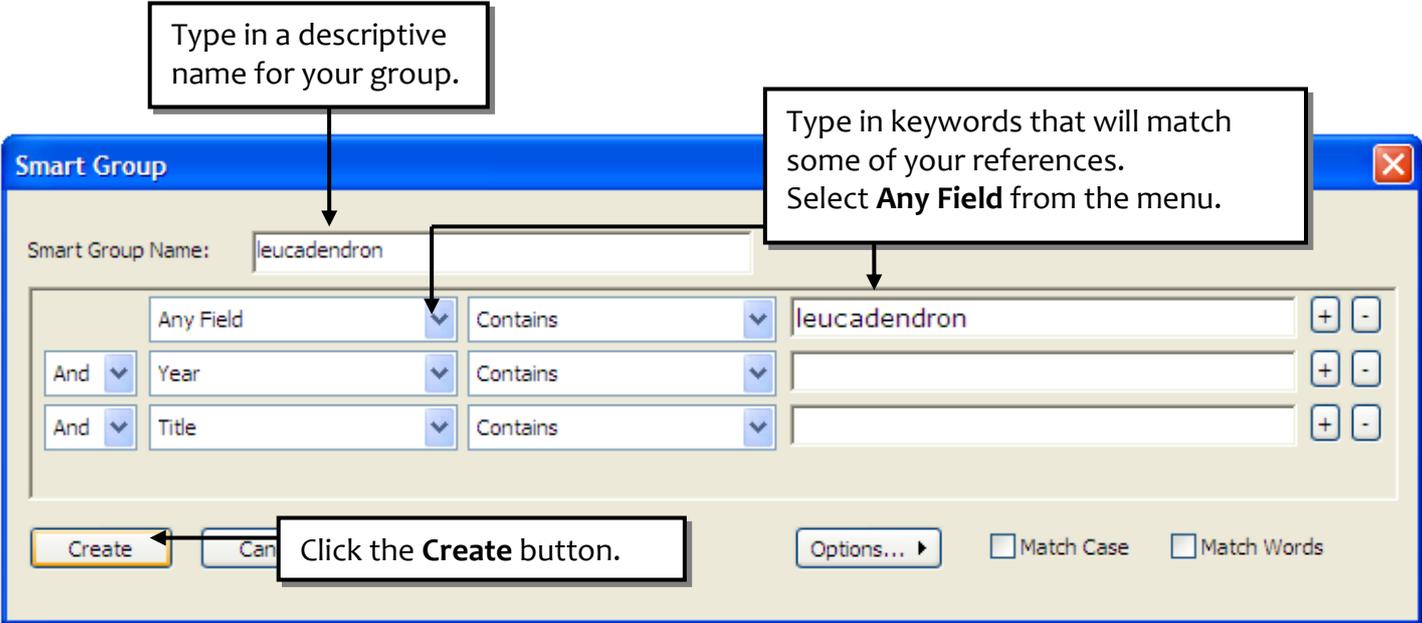
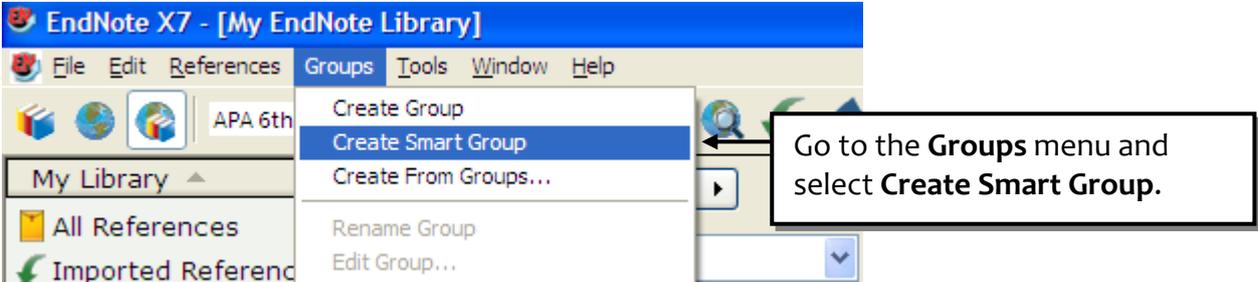
You can then start filing references in groups by dragging and dropping them from the Reference List pane onto the group name.

You can also file references by right-clicking on the one you want, going to **Add References to**, then selecting the group you want.



Creating a smart group

Smart groups are built with search strategies, for example, works by a particular author or matching some subject keywords. Smart groups are dynamically updated as you add references to and edit references in the library.

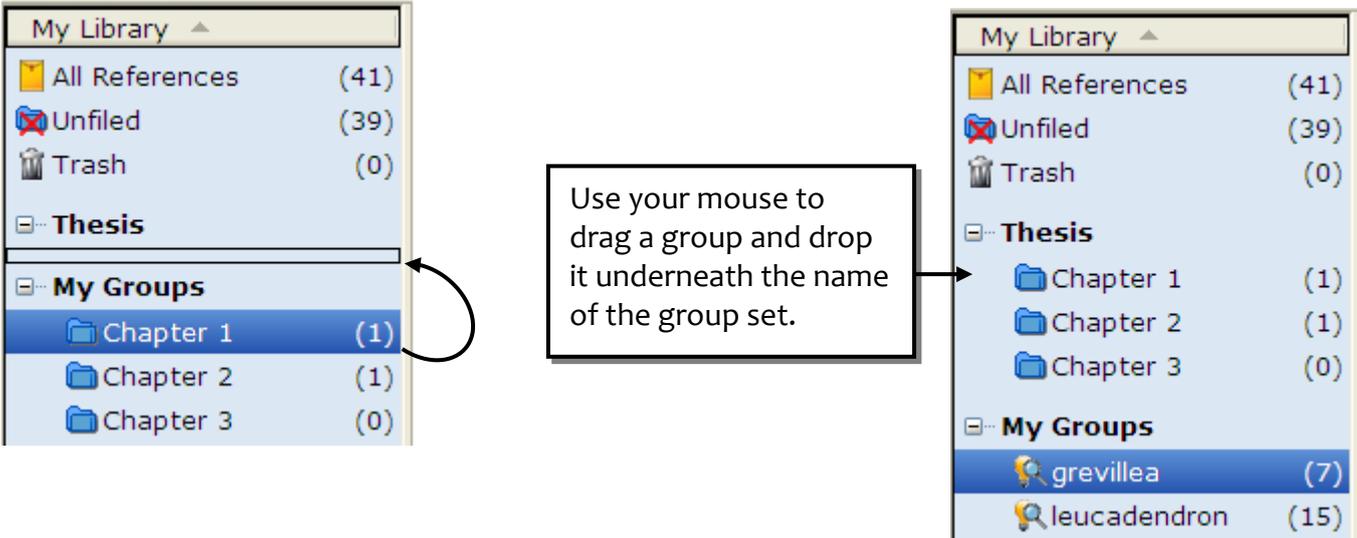
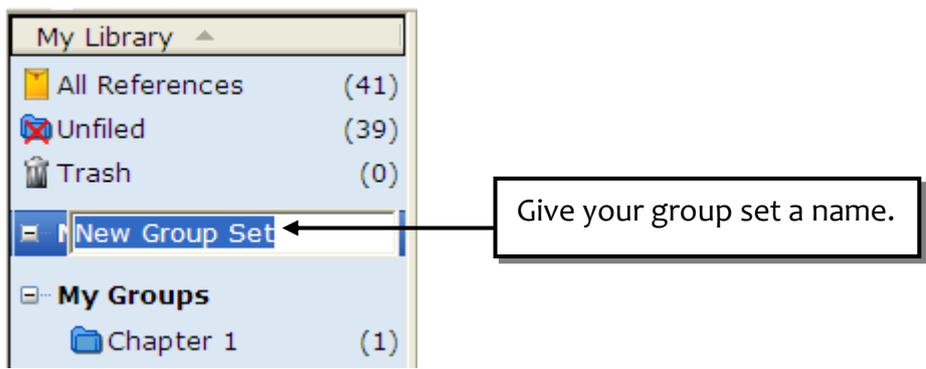
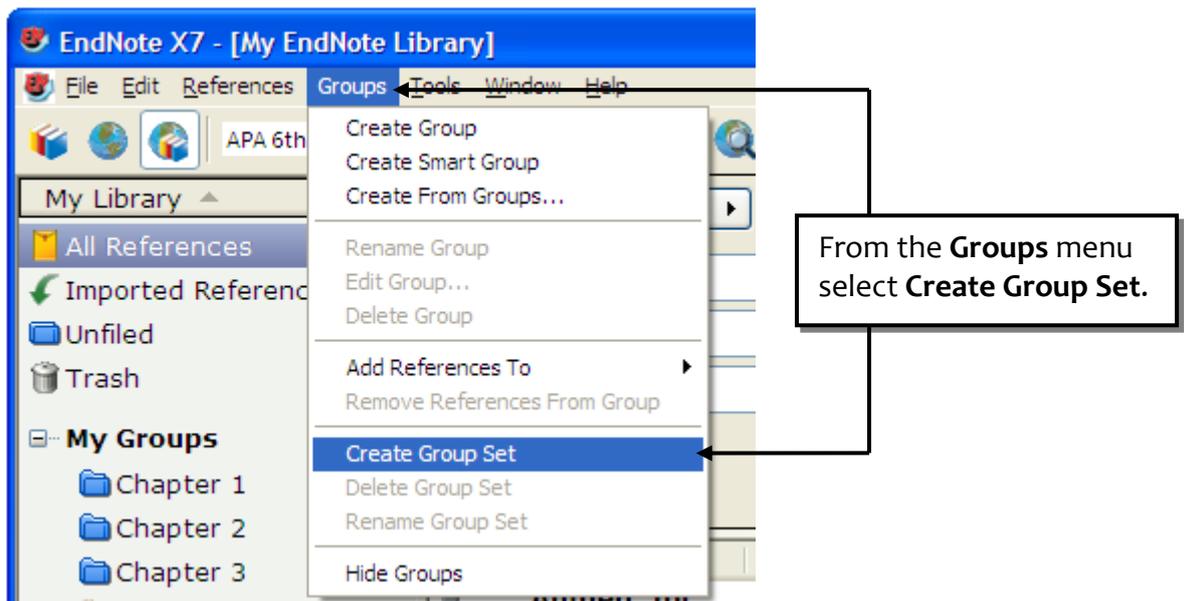


My Groups	
Chapter 1	(1)
Chapter 2	(2)
Chapter 3	(0)
leucadendron	(9)

Any references you have in your EndNote library which match the search criteria for your Smart Group will automatically be filed in the Group, as will any future references you add.

Creating a group set

If you make custom groups and/or smart groups to help you organise your references, before long you might end up with a large number of groups. To help you organise your groups you can create *group sets*.



Duplicate records

As you add more and more references to your EndNote Library, from a variety of databases, it is likely that you will get duplicate records for the same item.

To avoid anomalies in your citations and references once you start adding them to your Word document, you need to ensure that you only have one record for each item. (This is another reason to only use one EndNote Library).

- Go to the **References** menu and click **Find Duplicates**.
- Any duplicate records will be displayed, with the areas of differing text displayed. This will help you decide which record you wish to keep.
- Generally, you should keep the older record, as this is likely to be the one you have edited, added attachments to, and most importantly, already used for citations in your document.

You can tell which is the older record by looking at its record number (preceded by #).

Comparing 1 and 2 of 2 duplicates.
Select the record to keep. The record not selected will be moved to the Trash. Select Skip to go to the next set of duplicates.

Keep This Record Skip Cancel

Pratt, 2012 #5
RefType: Journal Article

Rating
.....

Author
Pratt, Robert B.
Jacobsen, Anna L.
Jacobs, Shayne M.
Esler, Karen J.

Year
2012

Title
Xylem transport safety and efficiency differ among fynbos shrub life history types and between two sites differing in mean rainfall

Journal

Pratt, 2012 #782
RefType: Journal Article

Rating
.....

Author
Pratt, Robert B.
Jacobsen, Anna L.
Jacobs, Shayne M.
Esler, Karen J.

Year
2012

Title
XYLEM TRANSPORT SAFETY AND EFFICIENCY DIFFER AMONG FYNBOS SHRUB LIFE HISTORY TYPES AND BETWEEN TWO SITES DIFFERING IN MEAN RAINFALL

Journal

Added to Library: 03/10/2012 Last Updated: 03/10/2012

When you have finished any editing, click the **Keep This Record** button for the one you want to keep. The other record(s) will be sent to Trash.

If necessary, you can copy & paste information from your 'reject' record into the one you want to keep – for example, the more recent record may have a DOI.

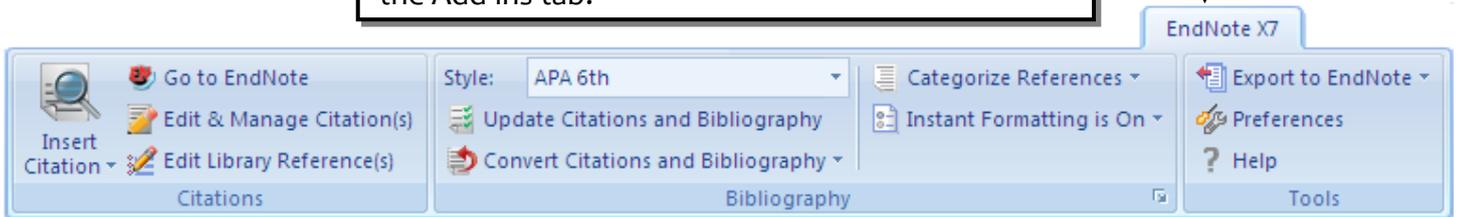
Note that the criteria used by EndNote to identify duplicate records won't always catch all of them. You will still need to look through your Library and delete any records you don't want. It is probably easiest to do this if you sort your Library by 'Author'.

Part 5 : Cite While You Write

EndNote works with Word to easily and quickly cite references, and create a paper with properly formatted citations, a bibliography, figures, and tables.

This is all done using the “Cite While You Write” (CWYW) toolbar, which you will see in Word once you have installed EndNote on your PC.

The EndNote toolbar will look like this. It will either be a separate tab on the ribbon, or be installed in the Add-ins tab.

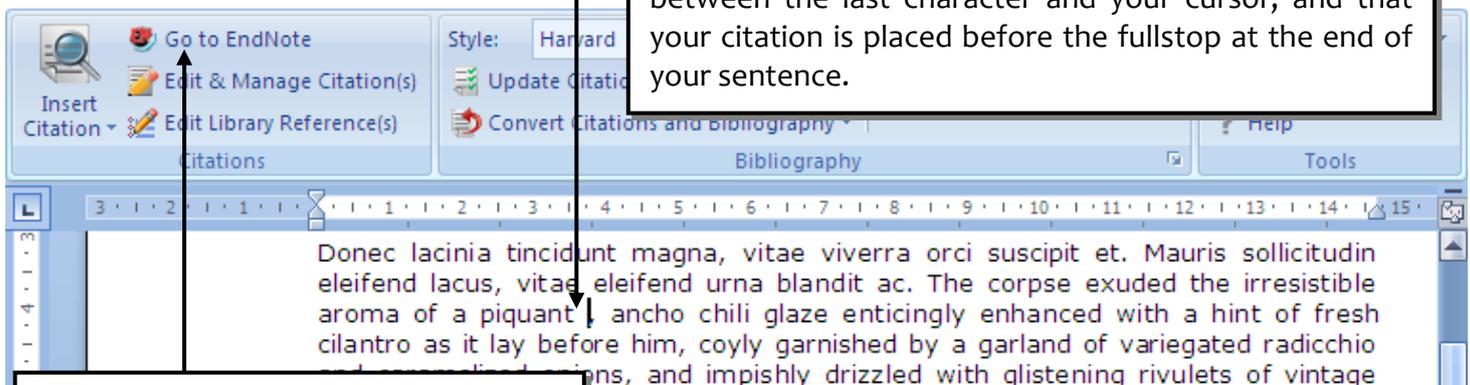


If you cannot find the CWYW toolbar please contact the ITS Service Desk, at: its-servicedesk@salford.ac.uk
- it is possible the EndNote program has not installed correctly on your PC.

Inserting citations & bibliographies into a document

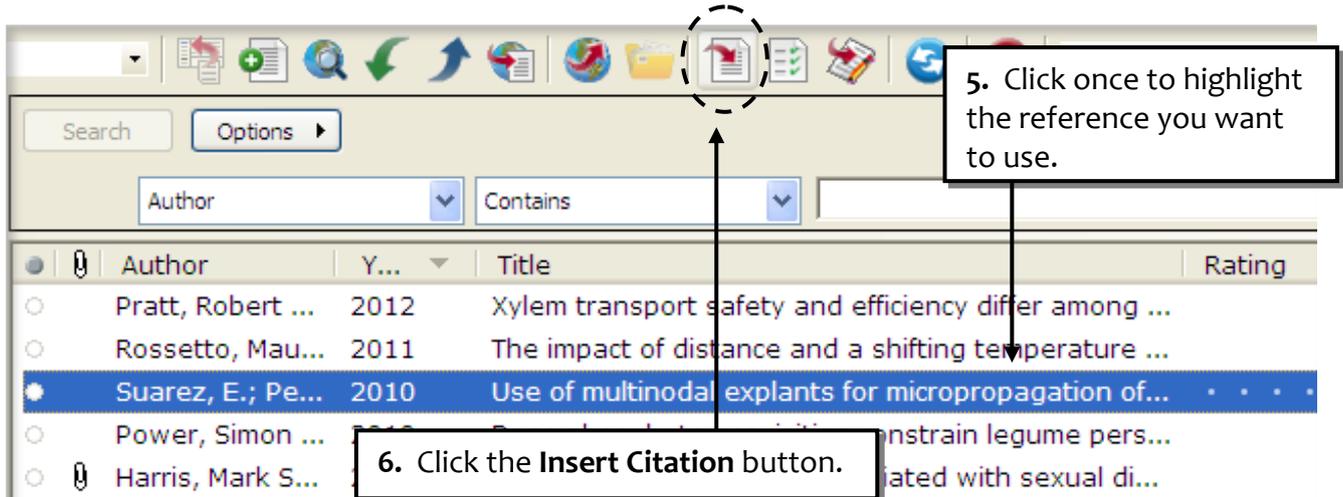
1. Open your EndNote library.
2. Open the Word document called **endnote essay**, which can be found in the *EndNote Examples* folder on the F: drive.

3. In the document click the place where you wish to place a citation in the text. Remember to leave a space between the last character and your cursor, and that your citation is placed before the fullstop at the end of your sentence.



4. Click the **Go to EndNote** button. This will open your EndNote Library.

In EndNote:



5. Click once to highlight the reference you want to use.

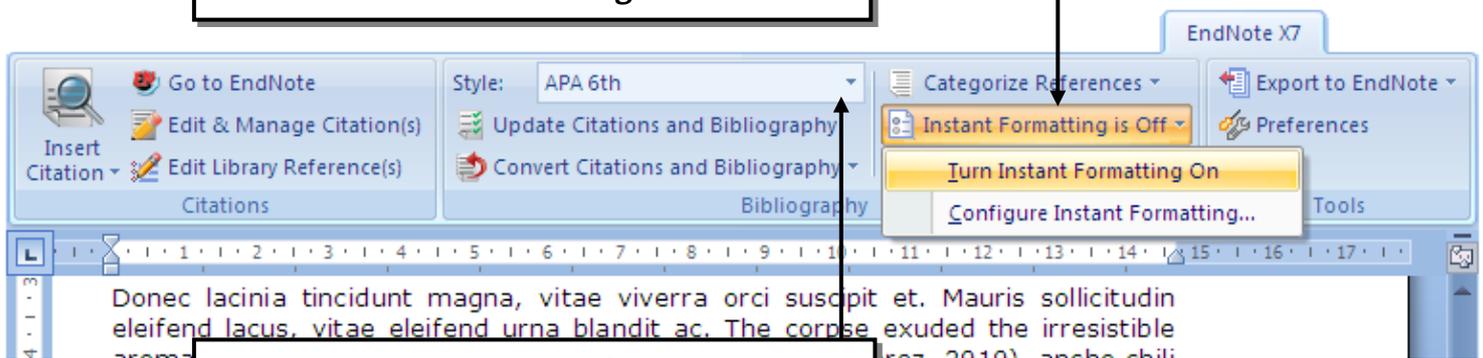
Author	Y...	Title	Rating
Pratt, Robert ...	2012	Xylem transport safety and efficiency differ among ...	
Rossetto, Mau...	2011	The impact of distance and a shifting temperature ...	
Suarez, E.; Pe...	2010	Use of multinodal explants for micropropagation of...	
Power, Simon constrain legume pers...	
Harris, Mark S...		... ated with sexual di...	

6. Click the **Insert Citation** button.

7. Return to your Word document.
You should see a citation that looks like this – the brackets { } and the number # indicate this is a temporary citation.

aroma of a piquant, ancho chili glaze enticingly enhanced with a hint of fresh cilantro as it lay before him, coyly garnished by a garland of variegated radicchio and caramelized onions {Suarez, 2010 #6} and impishly drizzled with glistening rivulets of vintage balsamic vinegar and roasted garlic oil; yes, as he surveyed the body of the slain food critic slumped on the floor of the cozy, but nearly

8. To format your citation and bibliography click the **Instant Formatting is Off** button and select **Turn Instant Formatting On**.



9. Select the style you want from the menu.

If you are not sure which one to use, see the section “Which style to use” on the next page.

Donec lacinia tincidunt magna, vitae viverra orci suscipit et. Mauris sollicitudin eleifend lacus, vitae eleifend urna blandit ac. The corpse exuded the irresistible aroma of a piquant, ancho chili glaze enticingly enhanced with a hint of fresh cilantro as it lay before him, coyly garnished by a garland of variegated radicchio and caramelized onions (Suarez, Perez-Frances, & Rodriguez-Perez, 2010) and impishly drizzled with glistening rivulets of vintage balsamic vinegar and roasted garlic oil; yes, as he surveyed the body of the slain food critic slumped on the floor of the cozy, but nearly empty, bistro, a quick-eyed and corpulent Inspector Moreau that this was, in all likelihood, the same semper nibh sit amet urna suscipit vel viverra torquentibus tempor nec interdum condimentum, mollis id risus.

10. You should now have a correctly formatted citation, and a bibliography at the end of your document.

Suarez, E., Perez-Frances, J. F., & Rodriguez-Perez, J. A. (2010). Use of multinodal explants for micropropagation of *Leucadendron* 'Safari Sunset'. *Spanish Journal of Agricultural Research*, 8(3), 790-796.

Which style to use?

There are two major systems of referencing: Numeric, where citations in the body of your text are indicated by numbers; and Author-Date (also known as parenthetical or Harvard), where the in-text citations are in the form of the author & date of the article enclosed in parentheses. Within these two main systems there are many different styles.

- A PhD thesis is a peer-reviewed document, and therefore:
 - ✓ You should use a referencing style that conforms to good publishing practice in your particular academic discipline.
 - ✓ The style should be consistent throughout the thesis.

Your supervisor will be able to advise you which style you should use.

- Academic journals often have their own referencing style and generally you will be able to find it, either already installed in EndNote, or available for download from the EndNote website at: <http://www.endnote.com/support/enstyles.asp>
- You should also find out what is required by looking at the journal's "instructions for authors" page, which you will find either within the journal or on the publisher's website.

Editing citations

Once a citation is inserted in your text you may need to edit it, for example, depending on whether you have used direct or indirect quotations, or have paraphrased or summarised your sources.

To edit citations you should use the EndNote tools, rather than editing directly with Word.

This is because there is a large amount of coding behind each citation which may become corrupted if you type directly into it.

```
<EndNote><Cite><Author>Coetzee</Au  
986</RecNum><DisplayText>(Coetzee e  
2003)</DisplayText><record><rec-numl  
keys><key app="EN" db-  
id="vv0zwxpafwda51epadyvdr0s2efed9r  
keys><ref-type name="Journal Article">  
type><contributors><authors><author>  
P. A.</author><author>Wingfield, B. D.
```

Direct quotations and page numbers

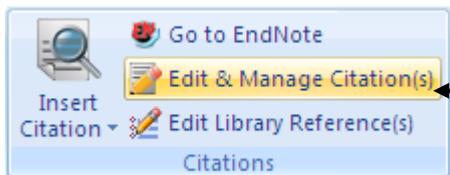
Many referencing styles require that a citation for a direct quote (or one where you have only changed the words slightly) must include the page number where you found it.

Page numbers are not required if you have paraphrased a source, however may still wish to include them – they will help your reader pinpoint where you found an idea, especially in a long work, such as a book or thesis.

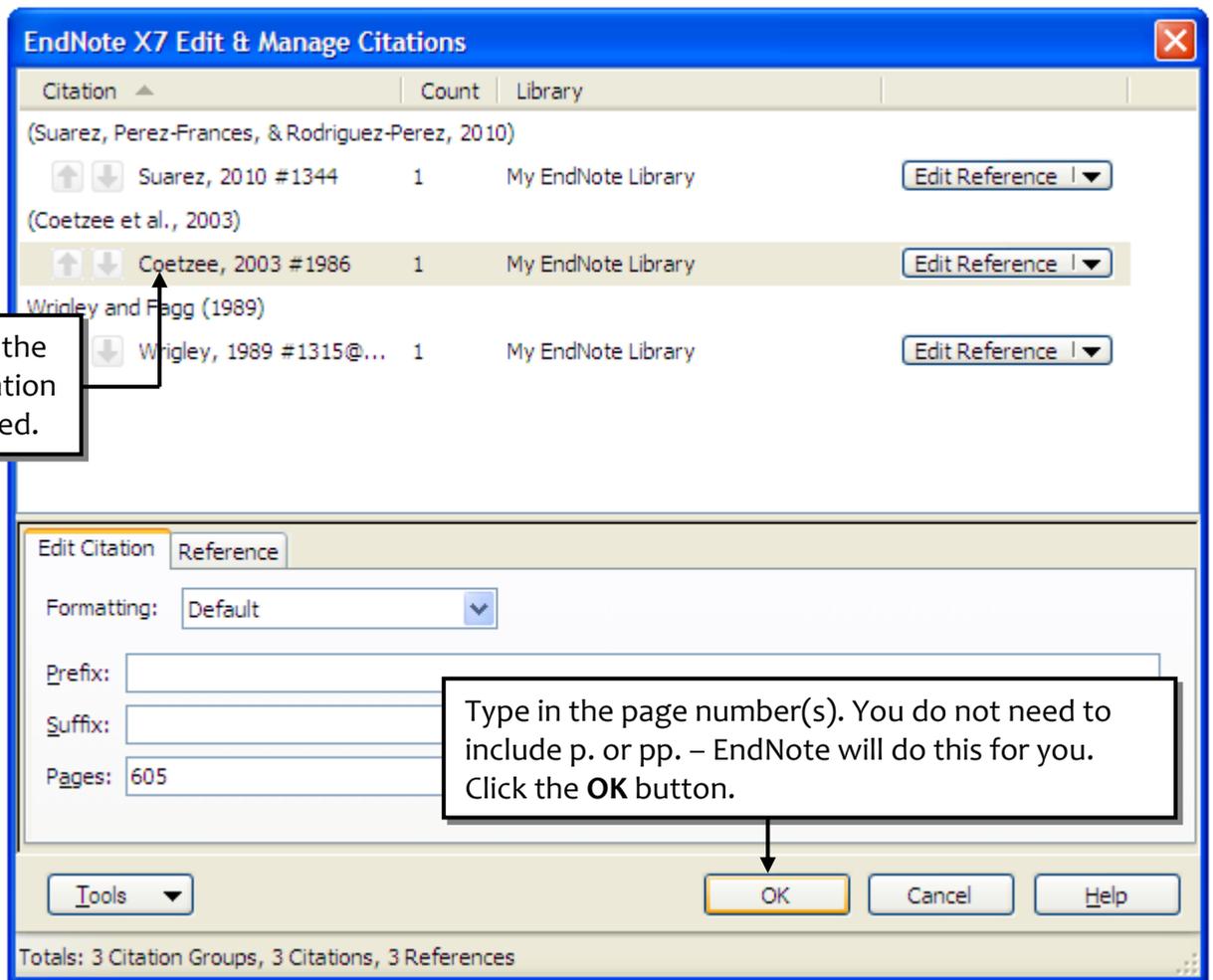
Remember that a direct quote should be placed in quotation marks, or indented from both margins if it is longer than two or three lines.

Praesent orci nisl, pellentesque vitae consequat et, ultricies ac nibh. Nam aliquam iaculis enim, sed commodo tellus mattis vel. "Identification of Armillaria species based on morphology is generally considered to be difficult, because basidiocarps of the fungus are short-lived and infrequently produced" (Coetzee et al., 2003). Vestibulum at nibh neque. Ut a metus at turpis scelerisque portitor. Donec

Click on the citation you wish to edit, so that it is highlighted.



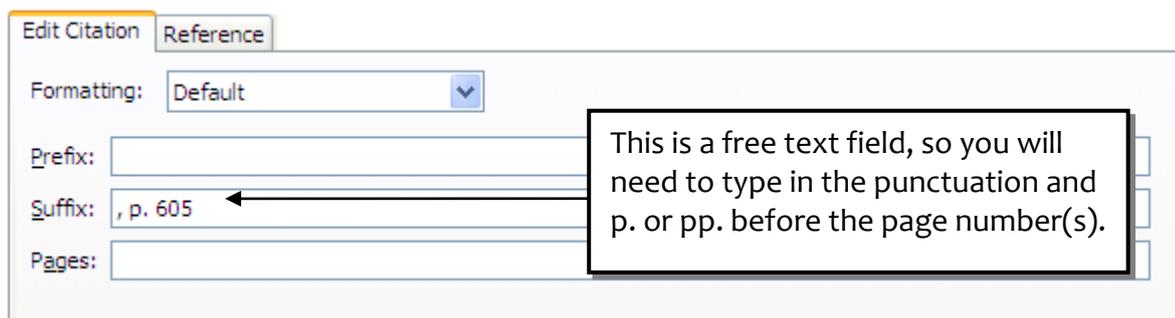
Click the **Edit & Manage Citation(s)** button on the CWYW toolbar.



Praesent orci nisl, pellentesque vitae consequat et, ultricies ac sed commodo tellus mattis vel. "Identification of Armillaria generally considered to be difficult, because basidiocarps of infrequently produced" (Coetzee et al., 2003, p. 605). Vestibulum turpis scelerisque porttitor. Donec mauris quam, sodales vitae

The correctly formatted page number will now be added to the citation.

Note: the EndNote templates for many styles are not set to accept page numbers as described above. If this is the case with style you have chosen you can still use the **Edit & Manage Citations** button to add a page number, but you will need to type it into the **Suffix** field.



Changing the citation format

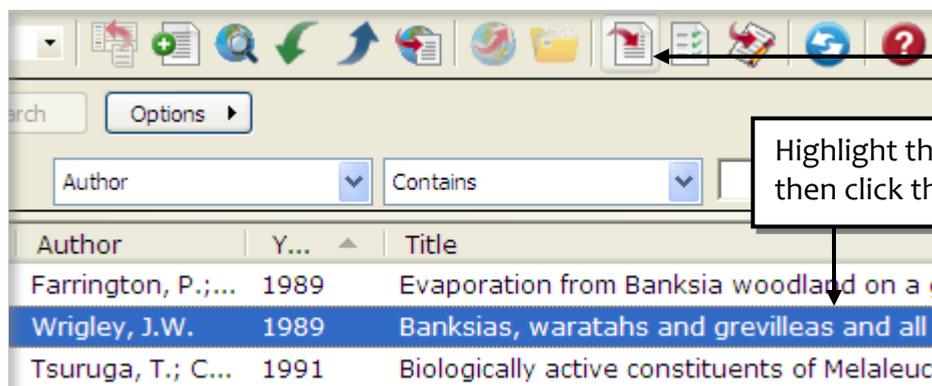
In your writing you will often integrate the author's name into your text, for example:

Wrigley & Fagg (1989) described the ...

In this case, you do not repeat the authors' names in a citation at the end of the section.

To format your citation this way, place your cursor where you want the author's name to be – usually this will be at the start of your paraphrase.

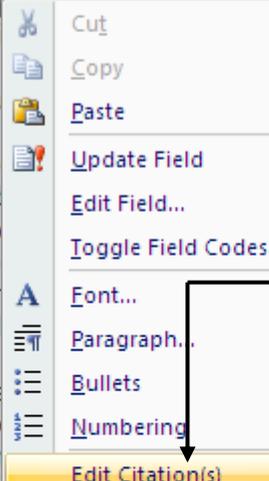
The sun, which much resembled the yolk of a sunny-side-up egg, set over the spoon is upside-down on top of it. Vivamus non lorem vitae leo congue vel urna iaculis placerat. Donec feugiat dictum dui et vestibulum eros consectetur vel. They had but one embraced each other as tightly as that two-flavor



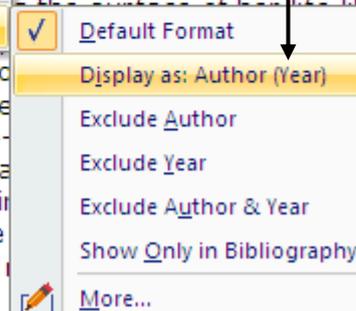
Highlight the reference you want, then click the **Insert Citation** button.

(Wrigley & Fagg, 1989) up egg, set over the spoon is upside-down on top of it. Vivamus non lorem vitae leo congue vel urna iaculis placerat. Donec feugiat dictum dui et vestibulum eros consectetur vel. They had but one embraced each other as tightly as that two-flavor

Cras id libero eros, in a dictum luctus imperditi tellus. Quisque vitae eros a flat stone forever skin oblivious to it consistently, until she finally lost more overdose of fluoride as a child which caused her to live life as useless as an appendix and as lonely as a five-steroid-free fitness center. Praesent sodales faucibus ante vel nisl euismod sed lobortis ipsum dictum. Proin bibendum. In in diam ac turpis sagittis feugiat vitae vitae fermentum faucibus, augue mauris dignissim arcu at magna.



Right-click on the citation you have just inserted, go to **Edit Citation(s)** and select **Display as: Author (Year)**.



Your citation will now be correctly formatted, i.e. authors' names incorporated into the sentence, separated with the word 'and', and followed by the date in parentheses.

Wrigley and Fagg (1989) described the sun as resembling the yolk of a sunny-side up egg, set over the slight hill like a cheerio falling off the back of a spoon when a spoon is upside-down on a table and a cheerio is set on top of it. Vivamus non lorem vitae leo congue dapibus in nec neque. Nam sollicitudin arcu vel urna iaculis placerat. Donec feugiat dictum dui et luctus.

There may also be times where you have mentioned both the **authors** and the **date** of an article in your text, (for example, *In his paper of 2008, Fourie reported that ...*) and therefore do not need either in your citation. You do still need the reference in your bibliography, and you should use EndNote to insert this.

Type the year and author into your text.

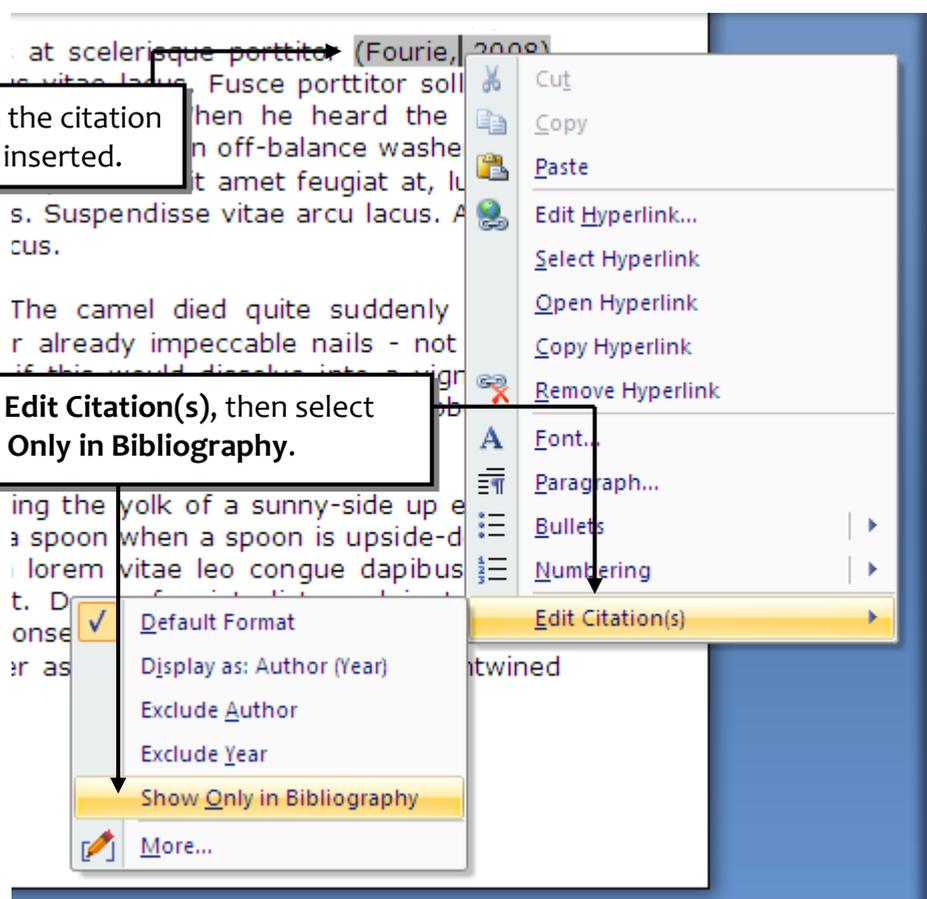
In his paper of 2008, Fourie reported that ut a metus at turpis scelerisque porttitor, Donec mauris quam, sodales vitae interdum id, faucibus vitae lacus. Fusce porttitor sollicitudin suscipit. Fusce n

Place your cursor where you would normally add the citation, i.e. at the end of the sentence.

Go to EndNote and add the citation in the usual way (see page 35, steps 5 & 6).

Right-click on the citation you have just inserted.

Go to **Edit Citation(s)**, then select **Show Only in Bibliography**.



The citation will be removed from your text, but the coding remains which ensures that the reference will stay in your bibliography.

, & Wingfield, M. J.
Africa. *Plant Pathology*, 52(5), 604. doi: 10.1046/j.1365-3059.2003.00879.x
Fourie, S. (2008). Composition of the soil seed bank in alien-invaded grassy fynbos: Potential for recovery after clearing. *South African Journal of Botany*, 74(3), 445-453.
Hoebee, S. E. (2011). Development and cross-species amplification of microsatellite markers from the endangered Wee Jasper Grevillea (*Grevillea iaspicula*, Proteaceae). *Muelleria*, 29(1), 93-96.

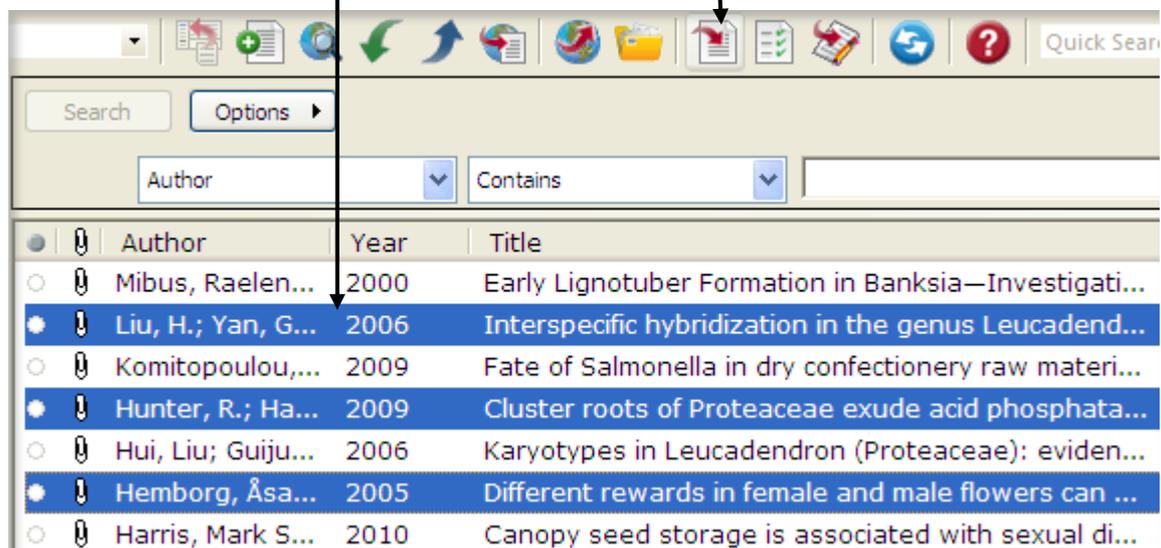
Adding multiple citations

There will be times when you have summarised the content of two or more different papers into a single sentence or paragraph, and will need to insert a multiple citation.

day, and Selena fretted sulkily and, bi
the first time since the journey beg
into a vignette of minor inconvenienc
sil. Etiam tortor quam, lobortis ac vari
convallis turpis porta sodales |

In your document, place your cursor where you need to put the citation.

In EndNote, hold down the <Ctrl> key while you select the references you wish to cite, then click the **Insert Citation** button.



nails - not for the first time since the journey began - pondered snidely if this would dissolve into a vignette of minor inconveniences like all the other holidays spent with Basil. Etiam tortor quam, lobortis ac varius vel, vestibulum vitae nisl. Etiam gravida convallis turpis porta sodales (Hemborg & Bond, 2005; Hunter, Hawkins, & Cramer, 2009; Liu, Yan, & Sedgley, 2006).

The multiple citations will be inserted in your document in the correct format – in this case, all three articles are enclosed in one set of parentheses, in alphabetical order and separated by semicolons. This will vary according to the reference style you have chosen.

Creating secondary citations

There are times that you will find something referenced in a book or an article that is so useful or interesting you want to use it in your own writing. This might be a citation for another article, or an illustration, graph or table taken from another work.

Generally, you should try to find and read the original work and use that as the source of your citation and reference. However, there are times when this isn't possible, for example, you may not be able to get hold of the original work, it is in a language you can't read, or the citing author has summed up the ideas in the original more succinctly or elegantly than you could ever manage.

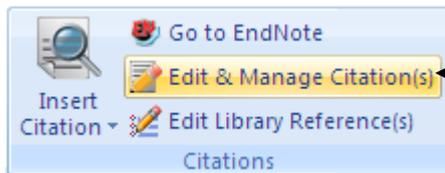
When you use a secondary citation like this, your in-text citation should mention both works but your bibliography only includes a reference for the work you have actually read yourself. You can use the CWYW tools to format a citation in this way.

of the cotyledons on either side of the hypocotyl extend to form a pair of auricles (Fig. 1A and B). Auricles are a feature of most woody fruited Proteaceae (Lamont and Groom, 1998); in most species of *Banksia* they are fused

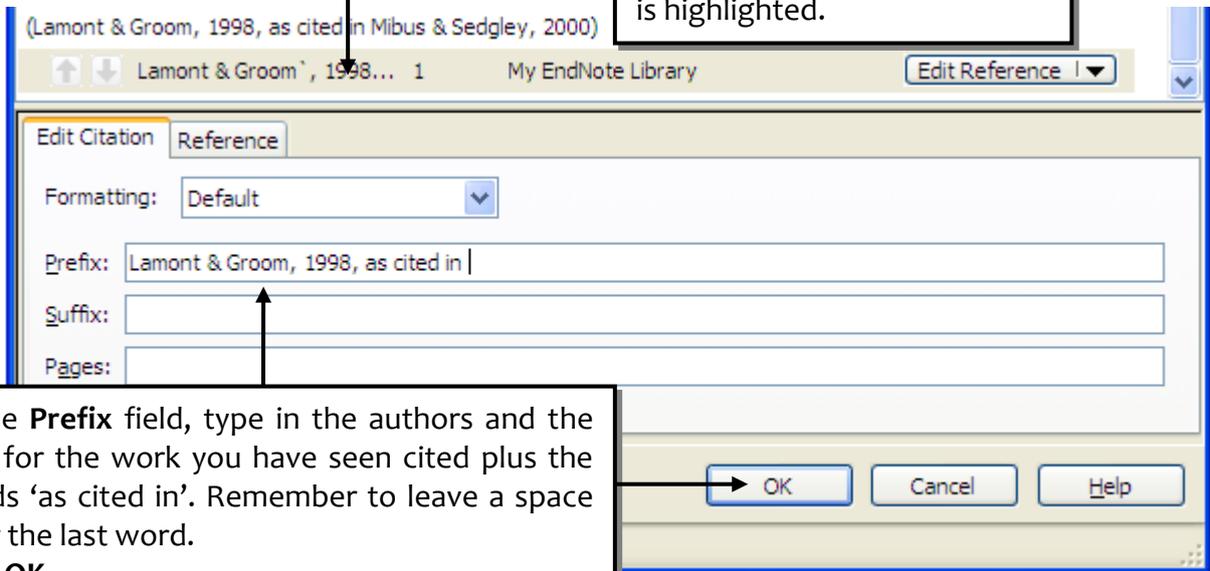
For example, you might wish to use this idea, attributed to Lamont and Groom in an article you have read by Mibus and Sedgley.

Cras id libero eros, in adipiscing ante. Auricles are a feature of most woody fruited Proteaceae (Mibus & Sedgley, 2000). Proin feugiat lectus nec metus dictum luctus imperdiet justo luctus. Suspendisse potenti. Sed vitae interdum tellus. Quisque vitae enim. Etiam lobortis ac varius vel, vestibulum vitae nisl. Etiam gravida convallis turpis porta sodales (Hemborg & Bond, 2005; Hunter, Hawkins, & Cramer, 2009; Liu, Yan, & Sedgley, 2006). A flat stone forever skip

Insert the citation for the article you have read, following the instructions on p. 35, steps 5 & 6. Click on the citation so that it is highlighted.



Click the **Edit & Manage Citations** button.



Make sure the correct citation is highlighted.

In the **Prefix** field, type in the authors and the year for the work you have seen cited plus the words 'as cited in'. Remember to leave a space after the last word. Click **OK**.

Cras id libero eros, in adipiscing ante. Auricles are a feature of most woody fruited Proteaceae (Lamont & Groom, 1998, as cited in Mibus & Sedgley, 2000). Proin feugiat lectus nec metus dictum luctus imperdiet justo luctus. Suspendisse

This will format the secondary citation and add the correct item to your bibliography.

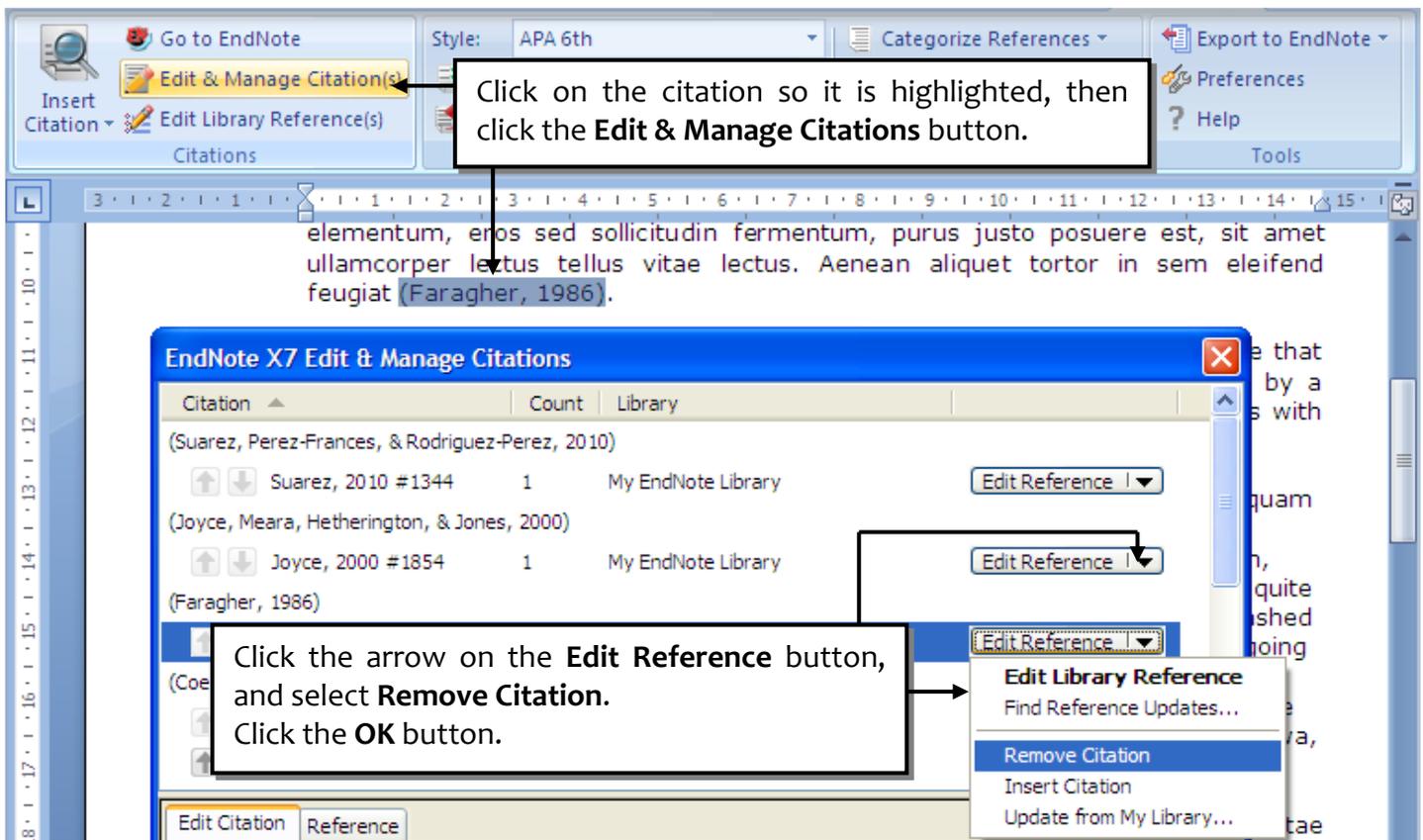
Mibus, R., & Sedgley, M. (2000). Early lignotuber formation in banksia— investigations into the anatomy of the cotyledonary node of two banksia (Proteaceae) species. *Annals of Botany*, 86(3), 575-587. doi: 10.1006/anbo.2000.1219

You could also format your citation in this way by typing the cited authors into your text, then using the **Edit & Manage Citations** button to insert 1998, as cited in .

Lamont and Groom determined that auricles are a feature of most woody fruited Proteaceae (1998, as cited in Mibus & Sedgley, 2000). Nulla facilisi. Proin feugiat lectus nec metus dictum luctus imperdiet justo luctus. Suspendisse potenti. Sed

Deleting citations

Because of the large amount of coding behind each citation you insert, you cannot simply remove a citation by using the <Delete> key. Nor can you delete a citation you have put in the wrong place by using the 'Undo' button in Word. To remove a citation you must use the CWYW tools.



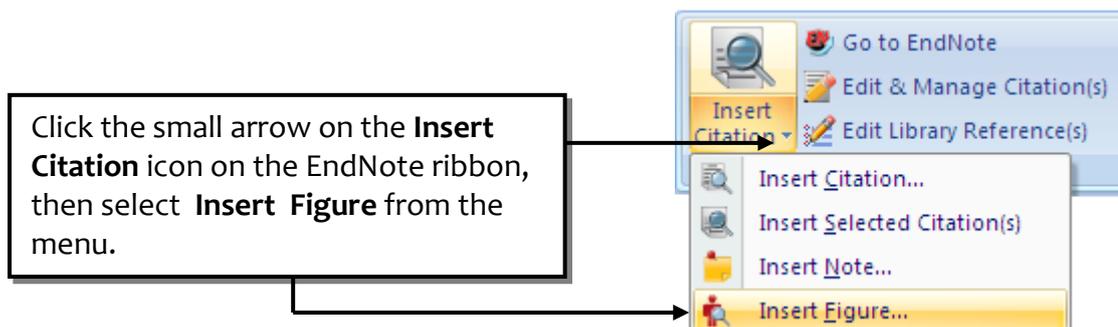
The screenshot shows the EndNote X7 ribbon with the 'Citations' group. A callout box points to the 'Edit & Manage Citation(s)' button, stating: "Click on the citation so it is highlighted, then click the **Edit & Manage Citations** button." Below the ribbon, a text document shows a citation "(Faragher, 1986)" highlighted. An 'EndNote X7 Edit & Manage Citations' dialog box is open, displaying a table of citations:

Citation	Count	Library	
(Suarez, Perez-Frances, & Rodriguez-Perez, 2010)			
↑ ↓ Suarez, 2010 #1344	1	My EndNote Library	Edit Reference ↓
(Joyce, Meara, Hetherington, & Jones, 2000)			
↑ ↓ Joyce, 2000 #1854	1	My EndNote Library	Edit Reference ↓
(Faragher, 1986)			Edit Reference ↓

A callout box points to the 'Edit Reference' dropdown menu for the highlighted citation, stating: "Click the arrow on the **Edit Reference** button, and select **Remove Citation**. Click the **OK** button." The dropdown menu is open, showing options: 'Edit Library Reference', 'Find Reference Updates...', 'Remove Citation', 'Insert Citation', and 'Update from My Library...'. The 'Remove Citation' option is highlighted.

Inserting images into your document

To insert an image into your document first press the <Enter> key once or twice to make a space where you want the image to go.



The screenshot shows the EndNote X7 ribbon with the 'Insert Citation' dropdown menu open. A callout box points to the 'Insert Citation' icon, stating: "Click the small arrow on the **Insert Citation** icon on the EndNote ribbon, then select **Insert Figure** from the menu." The dropdown menu is open, showing options: 'Insert Citation...', 'Insert Selected Citation(s)', 'Insert Note...', and 'Insert Figure...'. The 'Insert Figure...' option is highlighted.

A search form will be displayed. Type in a keyword (e.g. from the caption you gave the image) and click the **Find** button.

Author	Year	Title	Caption
Faragher	1986	Effects of cold storage methods on vase life and physiol...	Telopea speciosissima (Source: ANBG,
Faragher	1986	Post-harvest physiology of waratah inflorescences (Tel...	Telopea speciosissima © Natural Histor

A list of matching image references will be displayed. Highlight the one you want and click the **Insert** button.

Library: My EndNote Library.enl 2 items in list

and the white... Moz
really doesn't taste
does by colouring it
(Figure 1)
Cras id libero eros,
imperdiet justo luct
Dolores breezed alk

Depending on the bibliographic style you have chosen, the image you have just inserted may be displayed in “List of Figures” at the end of your document, with a Figure reference in your text – as in these examples.

In other bibliographic styles, the image will be displayed in the body of your text. If you wish, you can edit your Output Style in EndNote to determine how images are displayed.

Whenever you use illustrations, graphs, tables, etc. in your writing you should explain the purpose of them, and cite them as you would for any other literature you have used. For more information see the ‘Referencing Images’ guide at

<http://www.salford.ac.uk/library/help/userguides>

You should have separate bibliographies for ‘Lists of Figures’ and ‘Lists of Tables’. EndNote doesn’t generate these automatically, so to create them follow the instructions on the next page, *Exporting a Bibliography*.

List of Figures



Figure 1. *Telopea speciosissima* © Natural History Museum

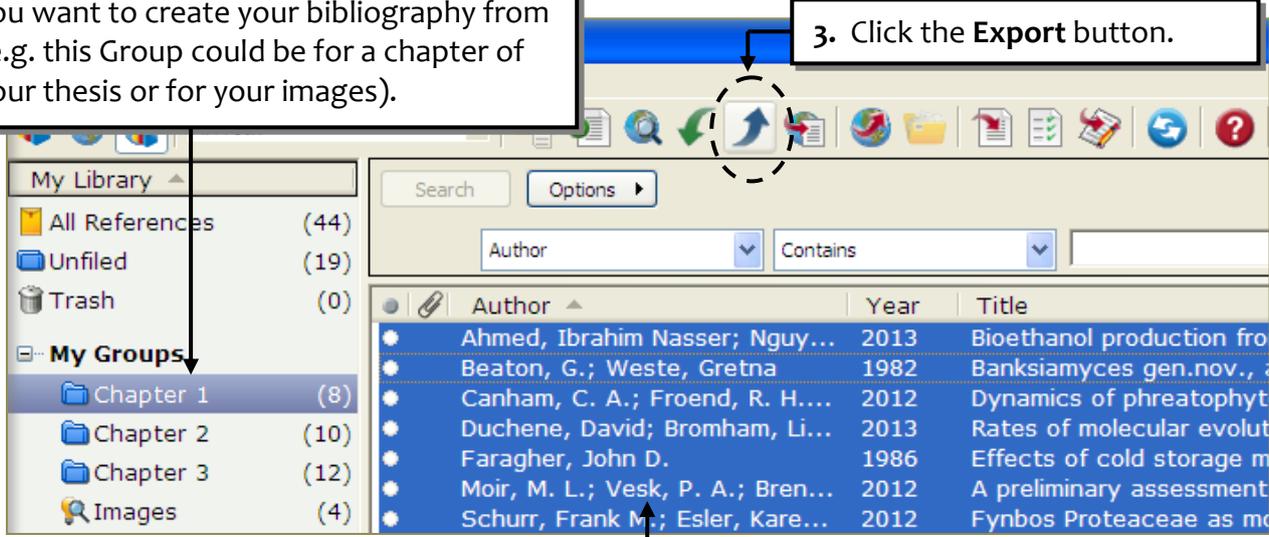
Exporting a bibliography

Sometimes you may wish to use EndNote just to produce a bibliography for you – for example, you may prefer to type your in-text citations yourself, or you may wish to create a separate list of illustrative material (see p. 45).

This can be done within your EndNote library; the exported bibliography may then be copied and pasted into your document.

1. Click on **All References** or the **Group** you want to create your bibliography from (e.g. this Group could be for a chapter of your thesis or for your images).

3. Click the **Export** button.

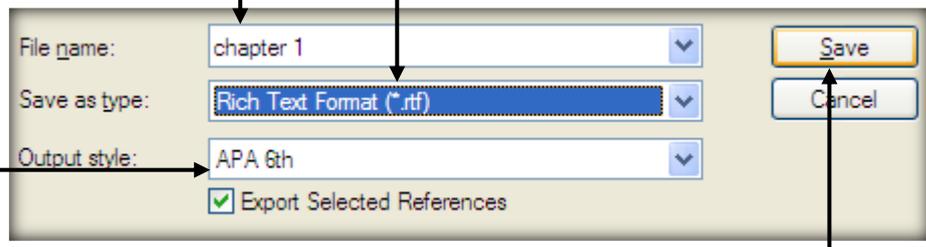


Author	Year	Title
Ahmed, Ibrahim Nasser; Nguy...	2013	Bioethanol production fro
Beaton, G.; Weste, Gretna	1982	Banksiamyces gen.nov., ;
Canham, C. A.; Froend, R. H...	2012	Dynamics of phreatophyt
Duchene, David; Bromham, Li...	2013	Rates of molecular evolut
Faragher, John D.	1986	Effects of cold storage m
Moir, M. L.; Vesk, P. A.; Bren...	2012	A preliminary assessment
Schurr, Frank M.; Esler, Kare...	2012	Fynbos Proteaceae as m

2. Select the references you want included in the bibliography, either by holding the <Ctrl> key while you click on them, or by using <Ctrl><A> to select all.

4. Give your file a name, and select **Rich Text Format (.rtf)** from the **Save as type** menu. Note you must choose RTF otherwise your bibliography won't have the correct formatting.

5. Select the **Output style** you want from the menu.



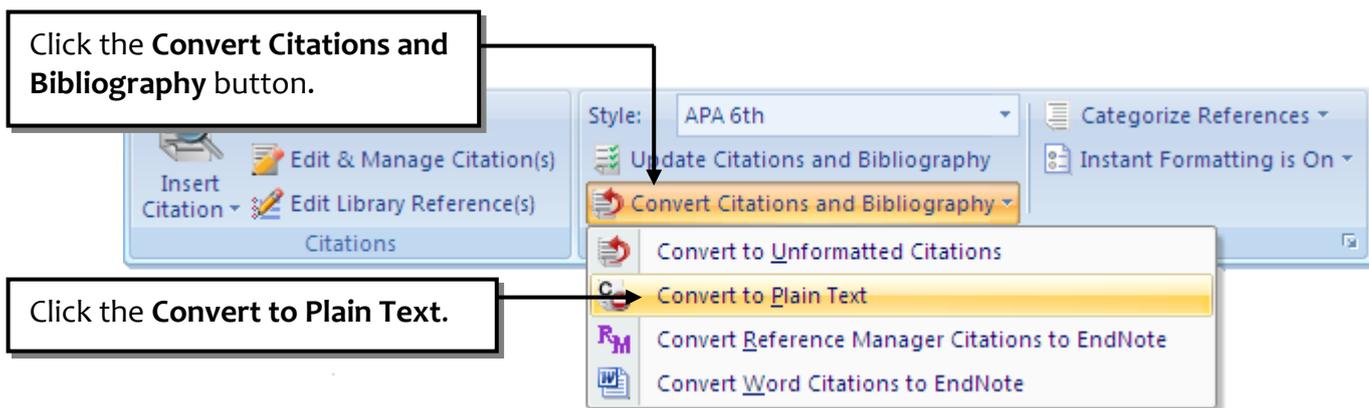
6. Click the **Save** button and select where you wish to save the file.

Electronic submission

If you need to submit your thesis, assignment or article electronically, or want to email it to your supervisor, colleague or publisher, you need to remove the EndNote coding from the document first.

If you do not remove the field codes before sending your document, they are likely to receive something that looks like this:

```
<EndNote><Cite><Author>Suarez</Author><Year>2010</Year><RecNum>1344</RecNum><DisplayText>(Suarez, Perez-Frances, & Rodriguez-Perez, 2010)</DisplayText><record><rec-number>1344</rec-number><foreign-keys><key app="EN" db-id="vv0zwxpafwda51epadyvdr0s2efed9rta9d">1344</key></foreign-keys><ref-type name="Journal Article">17</ref-type><contributors><authors><author>Suarez, E.</author><author>Perez-Frances, J. F.</author><author>Rodriguez-Perez, J. A.</author></authors></contributors><titles><title>Use of multinodal
```



You will be prompted to save the document with a different name – do this. The copy you have just made has no EndNote coding in it and is suitable for emailing and other electronic transfer.

If you need to edit your document or continue writing use your original document for this, i.e. the one that does have EndNote coding in it.

Tip!

If your own document suddenly looks like the above example, press the **<Alt>** and **<F9>** keys at the same time to restore it.

Part 6 : PowerPoint

Endnote X7 also has tools to insert citations and references in a Microsoft Powerpoint presentation. Please note that this functionality is only available for Windows.

2 Click the **EndNote X7** tab in PowerPoint.

3. In your EndNote Library, click to highlight your reference (see p. 35).

4. Select the style you want from the menu.

5. Click the **Insert Selected Reference(s)** button. The references will be inserted in the Text Box.

1. Create a Text Box where you want your references to go.

Mandrake

The intoxicating power of mandrake and its history goes back throughout the ages. Mandrake's fame struck all European civilizations. References to mandrake go back as far as the Holy Bible (Old Testament) and even further back in ancient eastern manuscripts. There was wide use of mandrake during the Greek and Roman ages, the medieval age as well as during the Renaissance period. This plant is known for its magic, aphrodisiac, healing, hallucinogenic, as well as poisonous properties (Hanuš, Řezanka, Spižek, & Dembitsky, 2005).

Hanuš, L. O., Řezanka, T., Spižek, J., & Dembitsky, V. M. (2005). Substances isolated from Mandragora species. *Phytochemistry*, 66(20), 2408-2417. doi: 10.1016/j.phytochem.2005.07.016

Sherwin, N. (2010). Mandragora officinarum [Watercolour].

If you wish, you can also put citations into your text, by using the **Insert Citation** button.

Please note: the EndNote tools in PowerPoint do not have the same level of functionality as those in Word, so if you need to change your style, or edit citations or references, you will need to delete them and start again.

Part 7 : Getting Help

- If you need advice about obtaining or installing EndNote please contact the ITS Service Desk:
 - email: **its-servicedesk@salford.ac.uk**
 - phone: 0161 295 2444
- For any help using EndNote please contact Anne Sherwin at: **a.sherwin@salford.ac.uk**
- The EndNote website provides a huge amount of help, including online tutorial guides and videos, FAQs and a Knowledge Base, a user forum and Customer Support:
<http://www.endnote.com/>