Massey University Library’s QuickStart Guide to EndNote X6
EndNote X6 QuickStart Guide with Word

What is EndNote X6?

EndNote X6 is a reference management programme that allows you to:

- create, store and manage your references and citations
- import and store references from library catalogues and electronic databases
- sort and search your references
- download and manage your fulltext (attach PDF documents or other files)
- insert citations into Word documents formatting your bibliography as you type

How do I Create an EndNote X6 Library?

1. Click on the EndNote X6 icon on your computer (it is listed under Start/All programs).
2. Then choose Create a New Library. Name your new EndNote X6 Library and save it on your desktop (or your network drive if using this on campus)
3. Your new (empty) Library will appear on your screen.

Hot Tip!

Just use ONE EndNote Library for storing all your References — no matter how varied the topic. You can use Groups or your own keywords to sort records and find them later.

EndNote Web Synchronisation

EndNote lets you have an online version of your library as an automatic backup, which also allows you to synchronise your library across different computers. You can also access your library on machines without EndNote, or allow shared access to groups, via your EndNote Web account: https://www.myendnoteweb.com.

The first time you synchronise your Library it will prompt for your EndNote Web account login. If this does not happen automatically, you can force it by clicking Synch with EndNote Web on the menu bar.

If you are not registered, click Sign Up and follow the prompts.
How do I add references into my EndNote X6 Library?

You can add references either manually (one by one) or import them (either singly or in multiples) from a journal article database or the Library Catalogue.

The following instructions are for a manual input. See Page 8 for instructions on importing references from a database.

To add a new reference manually:

1. Select References / New Reference from the top toolbar. This will open a new reference template. The default reference type is ‘Journal article’.

2. From the Reference type drop-down box, select an appropriate reference type template (e.g. book, journal article). EndNote X6 will format your reference based on the reference type you select here.

3. Once you have selected the right template you can add in the key referencing information (e.g. for a journal article you need to fill in the following fields: author, year, title, journal, volume, issue, pages). Additional information in other fields (e.g. notes) can be added later.

4. Close the reference window once you have finished inputting your information by clicking on the lower X in the top right corner.

5. You can check how the reference will appear in a bibliography by viewing it in the Preview tab at the right of the screen.

6. The most commonly-used referencing output style at Massey University is APA (6th). You can select other styles from the drop-down box at the top left of the screen.

Some hot tips about manually inputting references into EndNote X6

Editing: You are the editor of your EndNote references! You need to keep an eye out for errors – like typos, wrong template, capitalisation of words. If they are wrong in your EndNote record – they will always be wrong in your document!

Authors

- Author names are best entered using the family name first. (e.g. Jacobson, Carol Margaret).
- Multiple authors: Each individual author must be entered on a separate line (press enter to get a new line). Add all the author names you have.
- Be consistent when entering the same author more than once!
- Organisations: Enter with a comma at the end (e.g. Ministry of Health).

Titles

- Enter these in the correct case for your bibliographic style (e.g. APA). You must also enter the punctuation required within the title (e.g. a colon before a subtitle).

Punctuation

- Do not add extra punctuation or text styles to the reference information (e.g. parentheses around the year, bold, italics). EndNote X6 will add this punctuation and formatting when it formats your bibliography.
In-text citations (Cite While You Write - CWYW)

Once you have your references properly entered into your EndNote X6 Library you are able to experience the magic! You are now able to make use of the CWYW function.

Inserting a citation into a Word document

EndNote X6 is not a tool for librarians; it is a tool for non-fiction writers, like you, who wish to quote another author’s work. EndNote X6 will work alongside Word to create an in-text citation and a reference - in the bibliographic style of your choice.

1. Open your EndNote X6 Library, and Microsoft Word.
2. Place your cursor in the Word document where you want the citation to appear.
3. Click on the EndNote X6 tab, then click on and select Find citation.
4. This opens the search box where you can enter the author or a keyword(s) to find your reference(s). Highlight the one(s) you wish to insert.

Hot Tip:
- If you want to cite multiple references in one citation you should select the references at the same time by holding down the Ctrl key and clicking on each individual reference.

5. Click on Insert at the bottom of the screen or click the drop-down to see more insert options.
6. The reference will be inserted into your Word document where your cursor was located. See the example below.

Field Shading

This is switched on as a default setting for anyone using Massey University’s networked computers (Labs and Library Info Commons).

How to switch ON field shading:

1. Click on the office button on the top left of the screen and then click on Word Options near the bottom.
2. Select Advanced from the left-hand menu and scroll down to Show Document Content.
3. Use the drop-down menu to change to Always and click OK.

Editing in-text citations

The correct way to edit an in-text citation is to edit it using the EndNote X6 Edit & Manage Citations tool.

1. In Word, place your cursor on the citation you want to edit.
2. Select Edit & Manage Citation(s).
3. Add your page number(s) and click on OK.

Deleting in-text citations

The correct way to delete an in-text citation is to remove it using the EndNote X6 Edit & Manage Citations tool.

1. In Word, place your cursor on the citation you want to remove.
2. Click on Edit & Manage Citation(s).
3. Click on Edit Reference (the drop-down box at the right) and select Remove Citation, and then OK.

Final Cite-While-You-Write Hot Tip!

- Make the reference list in your Word document look beautiful by adding a space between each reference. You can do all your references in one go! Highlight the whole list and press Ctrl / 0

Using Your EndNote X6 Library!

Add Useful Notes to Your References

Use the Notes, Keywords or Label fields in any full EndNote X6 record to add your own annotations (which will not appear in the reference output style).

Copy references directly to Word (without using Cite While You Write)

1. In EndNote, select the reference(s) you wish to copy (hold the ctrl key while clicking).
2. Select the style you wish the references to be in (e.g. APA 6th).
3. Right-click and click on Copy Formatted and paste the reference(s) into the Word document.
Finding Your References Again!

It is possible to search **All References** in your EndNote Library by using the **Quick Search** box - just enter a keyword(s) and press Enter.

You can also search on keywords from any field (or all of) your EndNote X6 references, from the **Search panel** middle top of the screen. Press Enter to complete.

**Linking your PDF files to EndNote X6 References**

You can easily link full-text articles (PDFs) to your EndNote references!

1. Highlight the reference(s) and click on the Find Full Text icon on the toolbar.

Alternatively, you can:

1. highlight the references and **right click** on the mouse.
2. Scroll down and select **Find Full Text**.

If the automatic download doesn’t work, but you are still able to get a PDF copy of an article, then you can link it to the specific EndNote X6 reference using the following ‘**drag and drop’ method**.

1. Save the PDF to your desktop and **restore down** your EndNote X6 library so that you can see the both the PDF on your desktop and the **highlighted** reference in your downsized EndNote X6 library.
2. With your mouse left click on the PDF and drag it over to your highlighted reference. The PDF icon will be automatically linked to the reference.

**Downloading/Direct exporting from a database to EndNote X6**

A much faster way than manually entering references one by one into EndNote X6 is to download them in a batch from the database you are searching. This is the most straightforward method of saving records into EndNote X6.

**Web of Science**

Open your EndNote library. Go to the Web of Science databases and do a search.

From the results screen:

1. Select the records/references you wish to export by ticking the relevant box(es).
2. Scroll to the top or bottom of the results list and select the Save to EndNote… menu and select Save to EndNote Desktop.
3. The Sent to EndNote box will appear. Select the options you want and click Send.
   (Your browser may prompt you to select the EndNote Library you want to deposit the records into, and/or asking you to Open or Save the file - click Open.)

*Instructions on how to download/direct export references from other Massey University Library databases are on pages 7-10 in the Introductory Endnote Handout*


*Hot Tip:*
- The quality of the imported references varies between databases. You will need to check the references in EndNote - you may need to edit them. Look for: data appearing in incorrect fields; incorrect formatting of the title field (e.g. capitalisation); incorrect reference type template selected, no spaces between author initials, etc.
Need More Help?

See the Library's EndNote web page for more in-depth help, FAQs, on-campus classes and additional instruction guides:

You can also view an online tutorial on using EndNote which takes you through the steps outlined in this QuickStart guide.
https://connect.massey.ac.nz/endnotequickstart/

Fuller information on using EndNote can be found in the Library’s Introductory Endnote Handout http://www.massey.ac.nz/massey/fms/Library/Documents/Help%20and%20Instruction/Endnote/IntroductoryEndNote.pdf
- Instruction on how to exporting records from the Library Catalogue on page 6.
- Instructions on how to download/direct export references from other Massey University Library databases are on pages 7-10.

Find Massey-specific EndNote news, announcements and frequently asked questions on the EndNote@Massey Blog
http://masseyblogs.ac.nz/endnote/

Phone us on: 0800 MASSEY (0800 627739) and ask for Library or email libcol@massey.ac.nz