

# EndNote X3: Building your Personal Research Library

Instructional Services

[www.lib.ku.edu/instruction](http://www.lib.ku.edu/instruction)

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**Abstract:** This document provides instructions on using EndNote X3 (10.1), a bibliographic database and reference management tool for academic research and writing.

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## Instructional Services

### EndNote X1: Building your Personal Research Library

## Introduction

EndNote is reference management application that academic writers use to streamline and simplify the research and writing process.

This handout is designed to get you started using EndNote; it contains step-by-step instructions on how to perform basic tasks. For more detailed instructions, or instructions on more complex tasks, please refer to the **EndNote user guide** (available as a PDF file in the folder in which EndNote is installed) and EndNote's online help system.

**Note:** Endnote is available free to KU graduate students, faculty, and staff members. See [www.technology.ku.edu/software/endnote](http://www.technology.ku.edu/software/endnote) for download and installation instructions.

## Objectives

In this workshop attendees will get started using EndNote in their research and writing. Specific topics include:

- Create an EndNote Library (a database of references)
- Search and save references from the KU Catalog using EndNote
- Import saved search information from online databases into EndNote
- Search and sort references in EndNote
- Download and use EndNote filters, connection files, and output styles

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To learn more about or register for workshops, receive automatic announcements of upcoming workshops, and track workshops you've registered for and have attended, visit the [www.lib.ku.edu/instruction](http://www.lib.ku.edu/instruction). You can also check our online schedule at [www.lib.ku.edu/instruction/workshops](http://www.lib.ku.edu/instruction/workshops) for a list of class offerings and their availability. For further workshop related questions, please email [training@ku.edu](mailto:training@ku.edu).

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### EndNote X1: Building your Personal Research Library

## Definitions

Term	Definition
CWYW	Cite While You Write. A set of tools included with EndNote that work with Microsoft Word, and allow you to insert properly formatted citations and lists of works cited automatically.
EndNote Library (.enl)	A database file, containing references that are imported, hand-entered, or downloaded through a direct connection to a data source. An EndNote Library can contain an unlimited number of references, as well as images and other data (images are stored in a separate data file that is created when the library is created). EndNote Libraries have an .ENL file extension.
Data folder (.data)	This folder is considered part of the library; it includes images, group information and other files necessary for the library.
Field codes (used for citations and bibliographies)	Endnote inserts a citation in Word by using a field code. A field code is an imbedded command for Word to look back to EndNote for specific information. Field codes are also used when creating form letters or when using formulas in Excel. A field code is denoted by a grey field when you select it. <b><u>Convert to Unformatted Citations</u> or <u>Unformat Citations</u> will turn the field codes off and on.</b>
EndNote Compressed Library (filename.enlx).	A complete EndNote library (the filename.enl file as well as its associated .DATA folder and all of its contents) saved to a single compressed filename.enlx file in order to easily back up the library or send a copy to a colleague. <b>This file can only be restored by EndNote version 10 or later.</b>
EndNote Connection (.enz)	A set of instructions used by EndNote to connect directly to a data source. Some connections (those to commercial data sources, for example) require a login; others, such as the connection to the KU Library Catalog (and many other university libraries), do not. EndNote Connections have an .ENZ file extension.
EndNote Filter (.enf)	A set of instructions used by EndNote to import saved search information from a specific data source (such as the MLA Bibliography on the Silver Platter platform). EndNote Filters have an .ENF file extension
EndNote Style (.ens)	A set of instructions used by EndNote to create bibliography entries formatted for a specific style (such as APA or Chicago) or publication (such as the New England Journal of Medicine). EndNote Styles have an .ENS file extension.

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### EndNote X1: Building your Personal Research Library

## Your tool set:



Most of the tools found in the menu items (i.e. File, Edit, Reference, Tools, Window, Help) are duplicated as icons as well.

Hovering your mouse over an icon will bring up a popup box to tell you about its intended use.

## Getting Started

The first time you use EndNote, create a new EndNote Library (or .ENL file). This file will contain all the references for your research project. EndNote will create a second item, a folder (.DATA). This folder will hold your library attachments – **keep these two items together when you save or move your library!**

## Setting up EndNote

When you launch EndNote for the first time it will give you an opportunity to set up an EndNote Web account. EndNote Web is a service that allows you to store your library online and access it through a web browser.

If you do not have an EndNote Web account at this time, just click Cancel.

For information about EndNote Web, see Chapter 21, “Transferring Between EndNote Desktop and EndNote Web Libraries” in the full EndNote.PDF manual found in the EndNote application folder on your local computer.

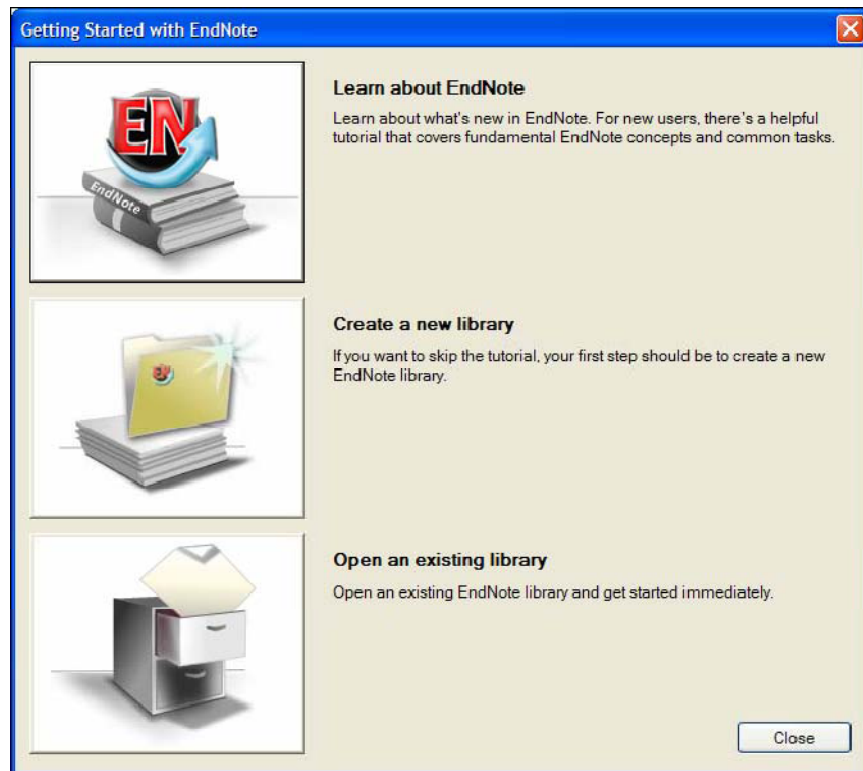
You should now be ready to create your own EndNote library.

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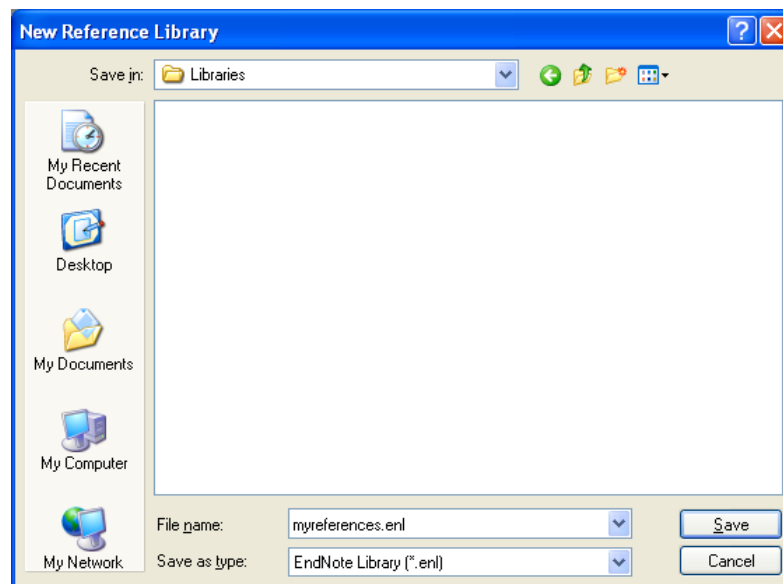
### EndNote X1: Building your Personal Research Library

## Creating an EndNote Library

1. Start EndNote. You will be prompted to create a new library, or open an existing library (as shown below).



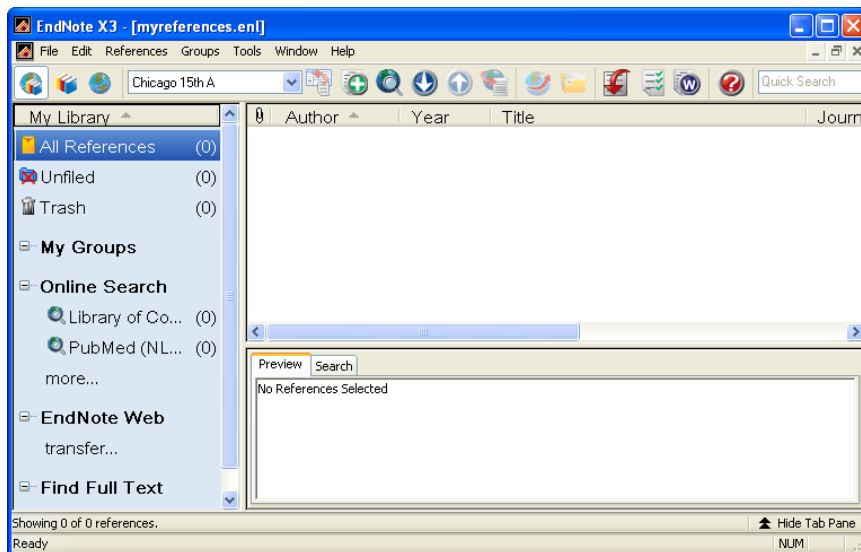
2. Choose **Create a new library** and click **OK**.
3. In the **Save in** dropdown box, navigate to the folder in which you would like to save your new library.
4. In the **File Name** box, enter the name for your new library, and click the **Save** button.



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5. A new, blank library will be displayed in the main EndNote window, as shown:



Once you've created your library, you're ready to **download**, **import**, or **manually enter** references.

## Opening an Existing Library

1. Start EndNote.
2. Click the **File** menu; choose **Open**, and **Open Library**.
3. Click **Browse** to locate your library (*filename.enl*).
4. EndNote will remember what libraries you have opened in the past and include them in the **Open** tab.

**Or** you can open an existing library by double clicking on the Endnote library file (*filename.enl*).

## Bringing References into EndNote

There are three ways to bring references into EndNote:

- **Searching an Online Database:** In this method, you use EndNote to connect directly to a data source (such as the KU Online Catalog or PubMed), typing your search terms into a window in EndNote, and bringing selected references from your search results into your EndNote Library.
- **Importing References:** In this method, you search the data source as usual (i.e. JSTOR, Expanded Academic), saving the results as a text file, and then bring the references into EndNote using an import filter.
- **Entering References Manually:** In this method, references are typed or copied and pasted into the EndNote Library field by field.

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## Searching an Online Database (i.e. KU library catalog)

With the EndNote Online Search command, you can search online bibliographic databases. The results of your searches can be downloaded either into a temporary EndNote library or directly into your own EndNote library. Some connections, especially those to commercial databases, require a login; others do not.

Connections to library catalogs such as university library catalogs and national libraries (including the Library of Congress), and PubMed do not require a login.

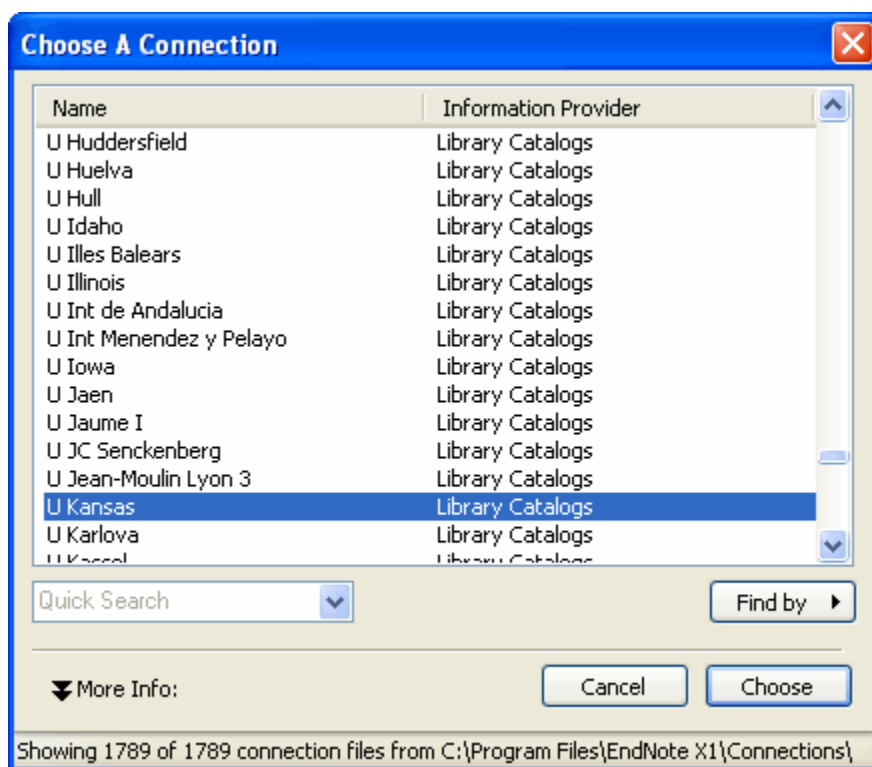
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**Note:** In order to connect directly to data sources with EndNote, your computer must be connected to the Internet.

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## Example: Connecting to the KU Libraries Catalog with EndNote

1. Go to the **Tools** menu and select **Online Search** to see the available list of online databases. You could also look under Online Search in the Groups pane and click more.



1. Type the word **Kansas** into the **Quick search box** and press the Enter key on your keyboard to filter the results. Find the **U Kansas** connection file. Click it to select it, and click the **Choose** button. A search panel will be displayed at the base of your library.

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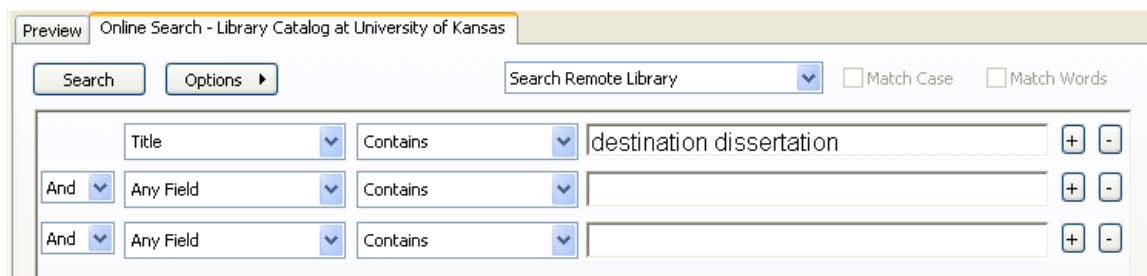
**Important:** If you don't see U Kansas in the list you may need to copy it to your EndNote/Connection folder. See the installation instructions on the Information Technology Website for details and the file.

[www.technology.ku.edu/~technology/software/endnote/](http://www.technology.ku.edu/~technology/software/endnote/)

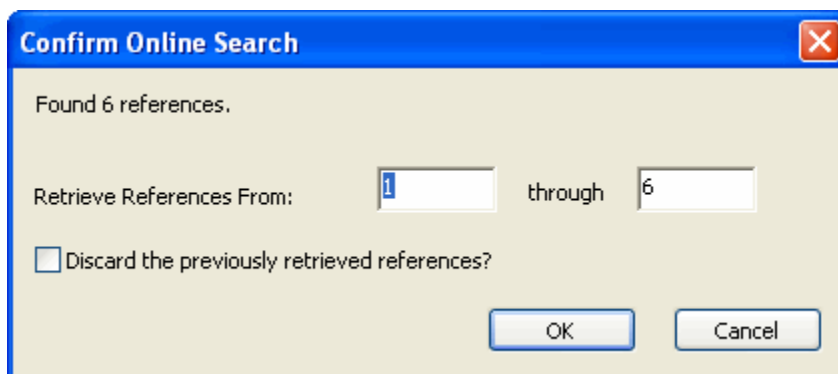
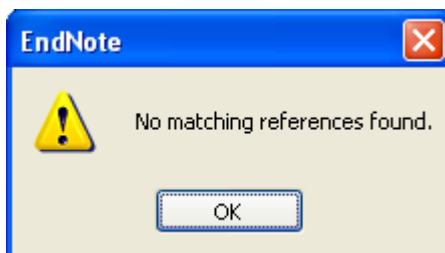
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The Groups pane will remember databases you have connected to in the past for easy access under Online Search. You can also customize a list of favorite databases to search by using the Connection Manager.

2. In the search panel, enter your search criteria.



3. Click the **Search** button to start the search, and wait for the search results. Once the search is completed, one of two dialog boxes will appear, as shown here:



4. If no references were found, click **OK** to return to the search panel and start a new search. If references were found, click **OK** to view the references.
5. To review the details of a reference, double-click it to display it in a reference window.

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6. The references are downloaded into your library and appear both in the **All References** group and in a temporary group for the database connection.

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**Note:** If you would prefer to save references to a temporary library first, to verify which references you want to save, you would

have begun by selecting Online Search Mode.



## ***Importing References (i.e. online journals accessed through KU libraries)***

Another way to bring references into EndNote automatically is to import saved search data using an Import Filter (.ENF) file.

### **Importing Instructions for KU Library Databases**

Detailed, step-by-step instructions for importing data into EndNote from databases available through KU Libraries (such as the MLA Bibliography, Wilson Omnifile, or Social Work Abstracts) are available **online**:

[www.lib.ku.edu/technology/citing/import](http://www.lib.ku.edu/technology/citing/import)

To use this online tool, choose the database you are using from the drop-down list under the **EndNote** heading, and click the **Go** button. The instructions for that database will be displayed in the web browser.

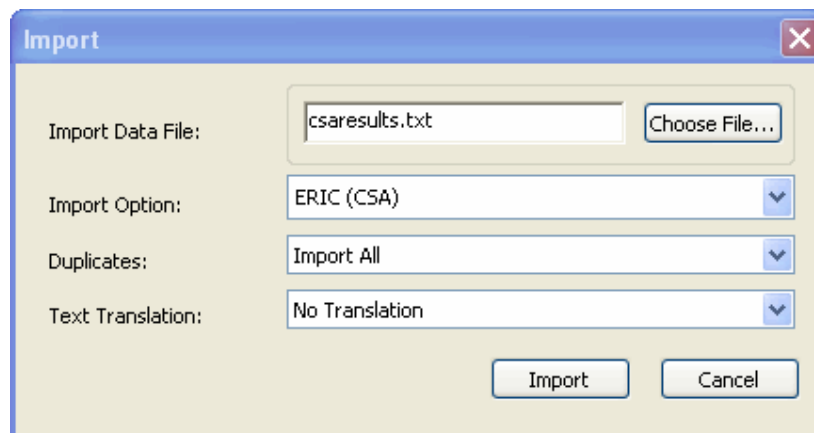
## **Using Import Filters**

1. Search the data source (such as the MLA Bibliography, Wilson Omnifile, or Social Work Abstracts) as you normally would.
2. Save the search results as a text file (some databases may require you to email the search, which you can then save as a text file) on a USB drive or your computer's hard drive.
3. Open your EndNote Library.

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- Click the **File** menu, and then click **Import**.



- In the **Import Data File** dialog box (shown above), click the **Choose File** button. Browse to the saved search text file, click it, and then click the **Open** button.
- Click the **Import Option** dropdown list, and choose the import filter you wish to use. If the one you want doesn't appear in this list, choose **Other Filters** for a complete list of filters available.
- Click **Import** to bring the records from your search into EndNote.

## Downloading Import Filters

Several hundred import filters are installed with EndNote; additional filters can be downloaded from the EndNote web site ([www.endnote.com/support/enfilters.asp](http://www.endnote.com/support/enfilters.asp)), and from other sources, such as web sites for university libraries.

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**Note:** EndNote import filters are designed to work with a specific version of a specific database. Occasionally, when database providers update their products, the filters cease to work, or encounter errors. If this happens, visit the EndNote web site, and download the latest version of the filter.

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To download an import filter from the web:

- Go to <http://www.endnote.com/support/enfilters-terms.asp>
- Find the hyperlink for the import filter you wish to download. Right-click the hyperlink, and choose **Save Target as**. (Mac users: Ctrl-click and choose **Download Link to Disk**.)
- In the **Save In** drop-down box, navigate to **C:\Program Files\EndNote X3\Filters** and click **Save**. (Mac users: save the file to the Filters folder where EndNote is installed.)
- You may want to just download the entire set to make sure that you have all of the latest filters.

## Working with References

### *Entering a Reference Manually*

To enter a new reference into an EndNote Library:

1. Start EndNote and open your Library (.ENL) file.
2. Click the **References** menu, and click **New Reference**. A **New Reference** window will be displayed.
3. In the New Reference window, select the appropriate reference type from the drop-down list at the top of the window (Journal Article, Book Section, Book, and so on). Different references types have different available fields, so choose the type first, before you enter any information.
4. Type or paste the information for the reference into the appropriate fields.
  - a. For multiple authors place one author name on a line
  - b. For institutional authors, such as the Department of Education, place a comma at the end of the name to keep EndNote from formatting the name as a person's name.
5. When you're finished entering the reference, click the **X** button at the top right of the New Reference window to return to the Library window.
6. EndNote X3 will ask you if you want to save your changes.

### *Editing a Reference*

1. Double-click the reference to open it in a Reference window to make changes.
2. Select the field that you want to enter by clicking in it with your mouse (or press TAB to move down and SHIFT+TAB to move up.)
3. When you're finished editing, click the X (close) button at the top right of the Reference window to return to the Library window.
4. EndNote X3 will ask you if you want to save your changes.

### *Deleting a Reference*

Click to select the reference, click the **References** menu, and click **Delete References**. When prompted, click **OK** to complete the deletion (or right click on the selected reference and choose Delete Reference).

### *Attaching a PDF (or other file) to a reference*

One of the great benefits of an EndNote library is its ability to organize your research materials as well as your citations. You can store up to 45 files—PDFs, graphics, PowerPoints and more—per reference using the “file attachment” field.

These are instructions on how to attach a PDF version of an article that you have already imported into your EndNote library. These instructions will work for attaching most other types of files to your library as well: SPSS, Word, Excel, mp3, etc.

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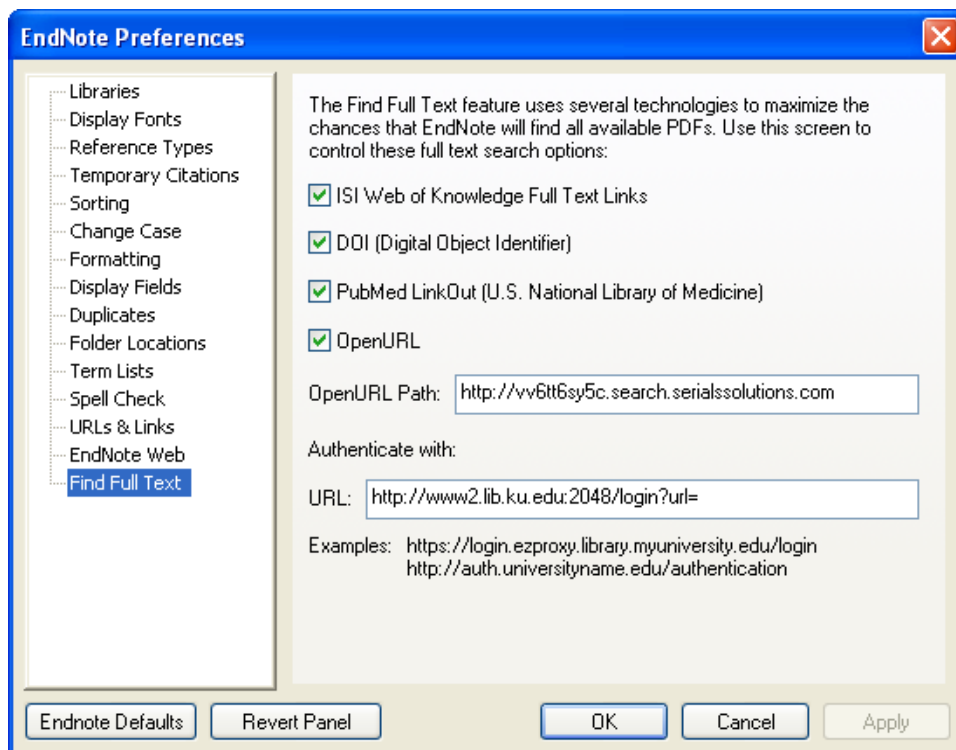
1. Import selected references into EndNote library.
2. Save accompanying PDF documents.
  - When you download and save the PDF name it something meaningful to you. Some databases have names that are too long for EndNote to manage.
  - Remember where you save the PDF. EndNote is going to create a second copy of this file. You can delete the file you downloaded once you have attached it to your library and confirmed that a copy is in your .DATA folder.
3. Open your library and identify the reference that is going to receive the PDF attachment.
4. From the **References** menu, select **File Attachments** and then **Attach File** to display a file dialog.
5. Navigate to the PDF you wish to attach. Click **Open** to insert the file into the **File Attachments** field.

## Find Full Text

The Find Full Text feature uses several technologies to maximize the chances that EndNote will find an available PDF associated with a bibliographic record in your library. You must configure this tool to make use of the settings and services contracted by the KU Libraries. The image below shows the correct settings for the KU Libraries.

OpenURL Path: <http://vv6tt6sy5c.search.serialssolutions.com>

Authenticate with URL: <http://www2.lib.ku.edu:2048/login?url=>



## Organizing References

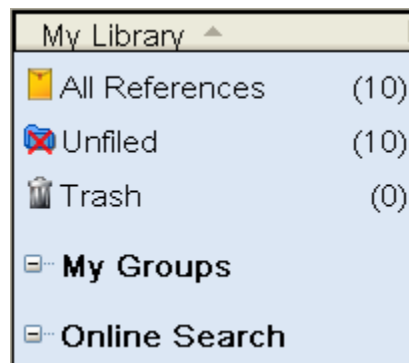
Once in an EndNote Library, your references can be sorted, searched, exported, and cited with Endnote's Cite While You Write feature.

### *Saving references to a group*

EndNote X3 has expanded the **Groups panel** to include Custom and Smart Groups.

**Custom Groups** are temporary collections of references stored in your library.

**Smart Groups** are groups made up of search parameters. A Smart Group searches your local EndNote library and collects items that fit a specific search and then stores them as a group.



To create a group and add references to it:

1. From the references menu, go to the Groups submenu and select **Create New Group** or **Create a Smart Group**. (Or, you can right click in the Groups pane to select **Create New Group** or **Create a Smart Group**)
2. Type the name of your group and then press Enter or click in the references list area to save the change.
3. Click on the All Reference group to display the entire library again.
4. For Custom Groups:
  - a. Select the references you want to include in this group by clicking on them.
  - b. Drag the selected references over into the Group folder by dropping them on the title of the group. (Or you can right click on the highlighted references and select **Add Reference To** and select or create the required group.
5. For Smart Groups: select search terms for the content of the articles you want included in the group. EndNote will survey your library for any articles that fist that search.

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**Note:** Deleting a group does also delete the references inside that group.

Additionally, the same citation can be located within multiple groups.

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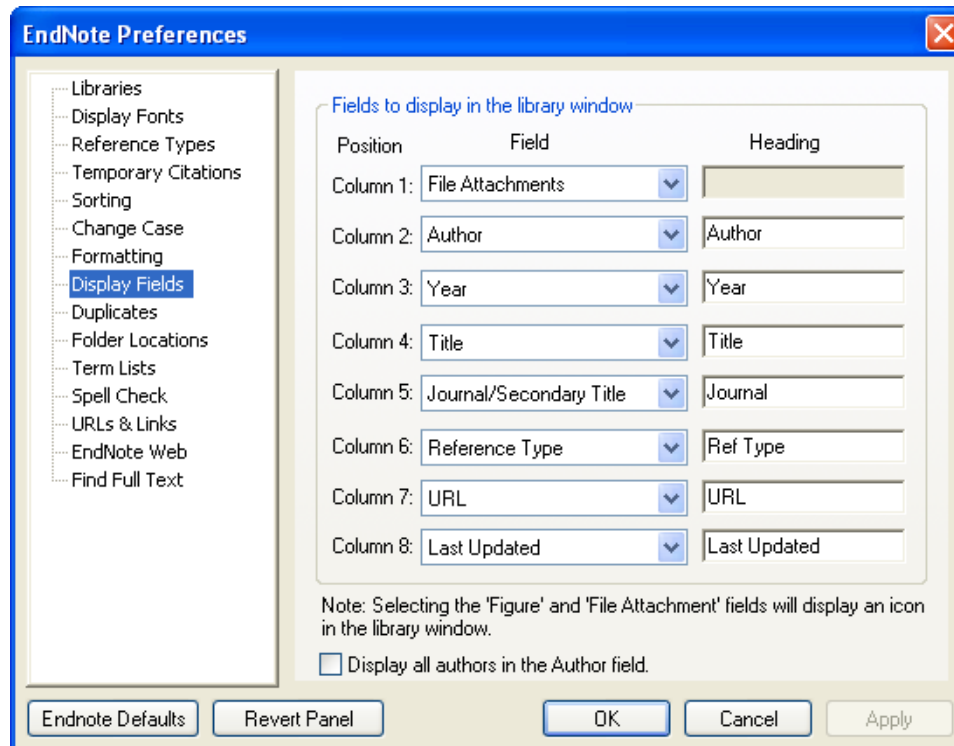
### EndNote X1: Building your Personal Research Library

## Sorting

References can be sorted by any field: author, title, date, reference type, and so on. To sort references by author, title, or date, click that field in the gray bar at the top of the library window.

If the field you wish to sort by is not visible in the library window, you will need to change the display. To do this:

1. Click the **Edit** menu, and then click **Preferences**.
2. In the EndNote Preferences dialog box, click “Display Fields,” as shown:



3. In any “unused” column, select the field you want to be displayed, and click **OK**.
4. In the library window, scroll to the display field you’ve just added. Click the field name in the gray bar at the top of the window to sort records by that field.

## Searching: Search all fields or any field

**Quick Search** is a quick way of searching the entire library at once.

Clicking on the Search Tab located with the Preview Tab at the base of the library window will open up a more advanced search option for searching individual fields. You will get the same search options by selecting the **References** menu and then clicking **Search References**.

## Hiding Empty Fields

When looking at an open reference. Click the double triangle icon to toggle between Hide Empty Fields and Show Empty Fields. Initially, EndNote displays all fields in a reference. Click Hide Empty Fields to view only those fields that contain data. This setting is remembered until you click the icon again.

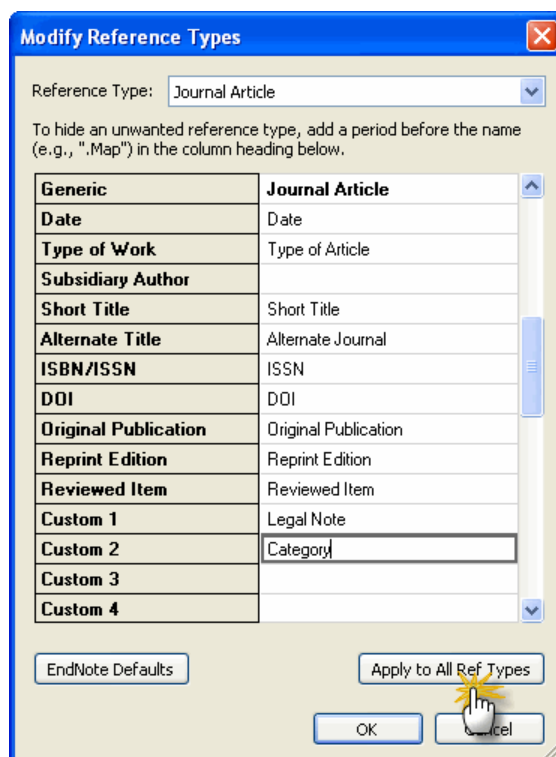


## Using Custom Fields

EndNote includes several data fields useful for reading notes and other kinds of information in the default reference types (such as the Note field). Users can also customize reference types by adding up to six custom fields.

To add a custom field to a reference type,

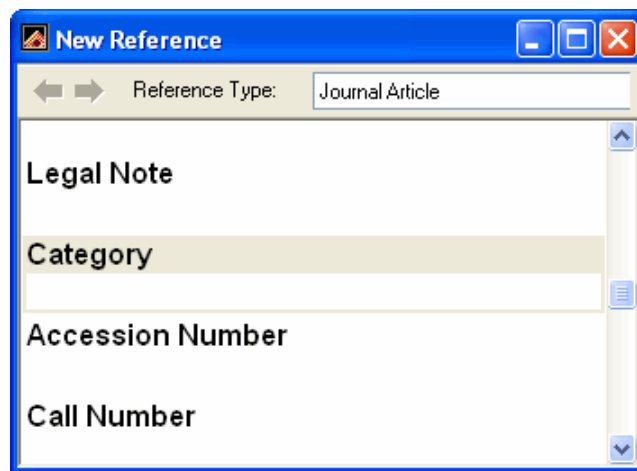
1. Click the **Edit** menu, and then click **Preferences**.
2. In the EndNote Preferences dialog box, click **Reference Types**.
3. Click the **Modify Reference Types** button.
4. In the **Edit Reference Types** dialog box, scroll to the Custom Fields. Type the title of the custom field you want to create into the column for **each** reference type applicable. In the example following, a custom field called “Category” has been added to the Journal Article, type. **To add a custom field to every reference type**, enter it for the first reference type (Journal Article), then click **Apply to All Ref Types**, as shown below:



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5. Click **OK** to create the custom field, and click **OK** again to close the EndNote Preferences dialog box. The custom field will be available for use when you enter or edit individual references, as shown below:



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**Note:** The customized field name will only show on the machine where you set it up. On other machines the Field name will be “Custom” however the data will remain intact.

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## Backing up and Sharing References

There are several ways to share EndNote Library references with other researchers. If they also use EndNote, you can give them the EndNote Library (.ENL file) itself, which can be imported into a library of their own, or opened to drag and drop individual records into a different library.

You can save your complete library (the filename.enl file as well as its associated .DATA folder and all of its contents) to a single compressed file in order to easily back up your library or send a copy to a colleague.

### *Saving to a Compressed Library File*

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**Note:** Your .enl file and your .data folder must be located together in order to create a complete back up of your library.

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1. Open the library in EndNote.
2. From the File menu, select **Compressed Library (.enlx)...**
3. Use the file dialog to save to an EndNote Compressed Library (filename.enlx).

## Copying References

You can copy references from one library and drop them into a second library. Either right click on the reference or references you wish to copy and select **Copy**. Open the

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new library and click inside the library window and select **Paste**. Or, instead of right clicking on the references, you can just **Drag and Drop** the references from one open library window to another. EndNote will copy the references for you.

## Backup Copies: Best Practices

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**Truism:** There are two types of computer users: those who have lost data and those who are going to lose data.

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Keep at least two sets of backup files, each at a different location. EndNote recommends that you have sets for alternate days, so if you discover that something went wrong yesterday, you will have the day-before-yesterday's version.

Make archival sets of the files listed above whenever you finish an important document. **A back up set should include all of the files that are needed to recreate a final formatted paper.** Label the backup files and store them separately from your computer. Burning them to CD/DVD is recommended. That way, if you ever need to recreate the document, you will have all of the necessary files.

## For More Information

Here are some additional sources of information about EndNote:

The **EndNote print user's guide** is a well-written resource that provides a great deal of information for both beginning and advanced users of EndNote.

The **EndNote web site**, [www.endnote.com](http://www.endnote.com), is the place to find updated versions of connection files, import filters, output styles, and the EndNote program itself. Tip sheets, a technical support database, and utility programs for repairing damaged EndNote Libraries and converting from other bibliography management tools to EndNote are also available from the **Support & Services** area of this site.

The **EndNote users email list**, [endnote-interest@isiresearchsoft.com](mailto:endnote-interest@isiresearchsoft.com), is another excellent source of information and problem-solving ideas. To subscribe, follow the instructions at [www.endnote.com/support/en-interest.asp](http://www.endnote.com/support/en-interest.asp).

## Getting Additional Help

Information Services provides consulting and Q&A help in a variety of ways:

785/864-0200  
questions@ku.edu

*Last Update: 07/27/2009*