



Guide to **EndNote**

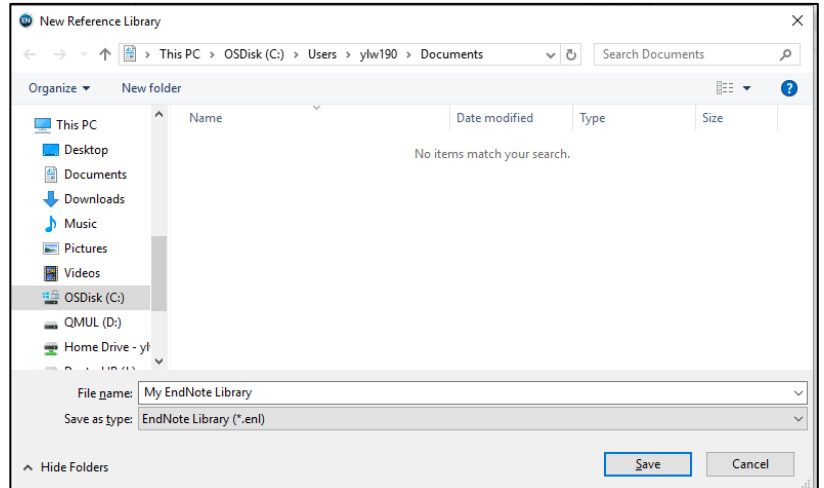


- **Capture bibliographic references from online databases**
- **Build your personal library of references and images**
- **Generate bibliographies in any style of your choice**
- **Watch the bibliography appear as you write your paper**

GETTING STARTED WITH ENDNOTE

When you open EndNote for the first time you have to create your own EndNote library before you can get started. You do this by going to the **File** menu and selecting **New**.

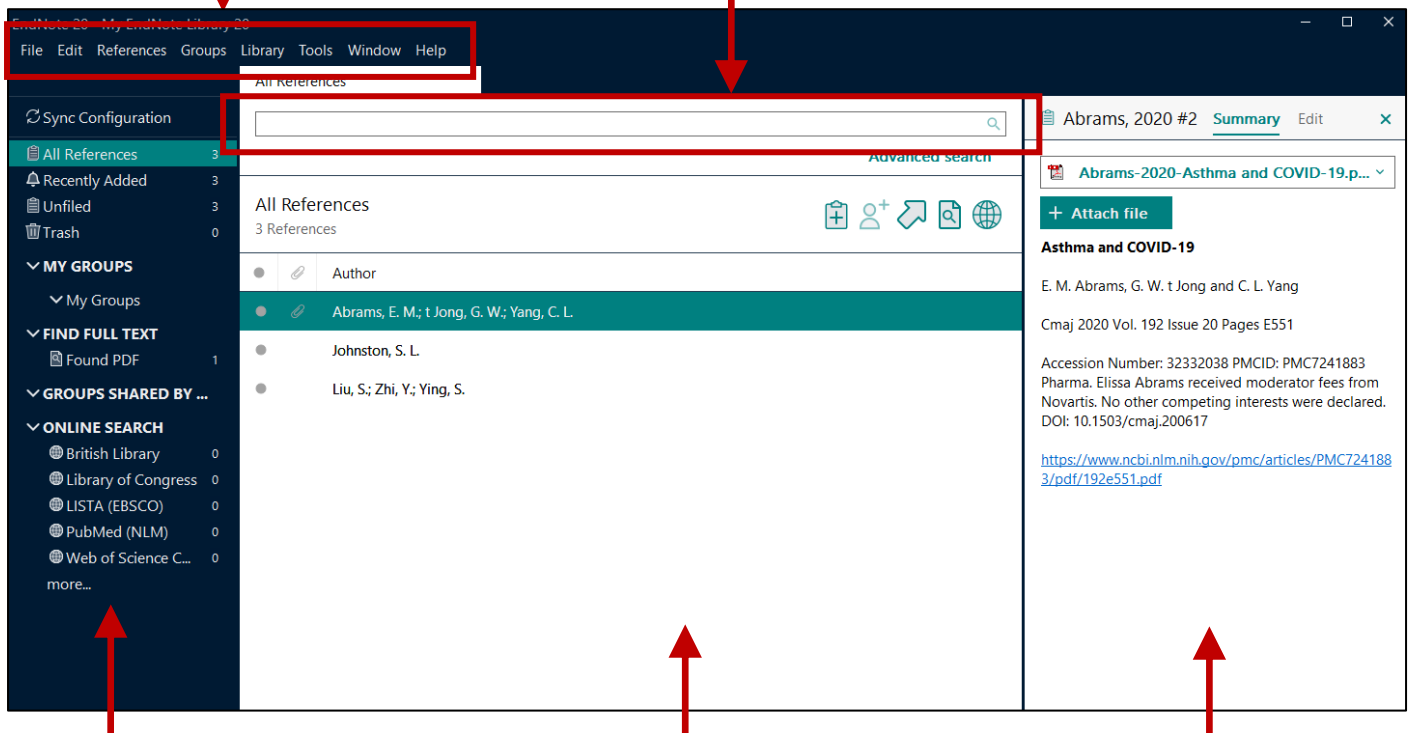
Give your EndNote library a name and save it. A new, blank library will automatically appear.



ENDNOTE LIBRARY

Toolbar: Functions for adding, using and formatting references, changing preferences etc.

Search: Enables you to search for references within your EndNote library



My Library panel: at a glance list of Library contents as well as commonly used **Online Search** sources.

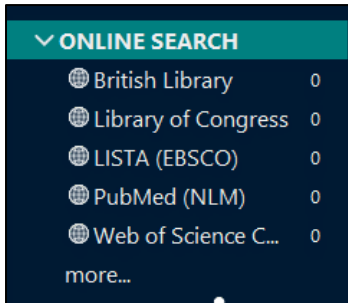
Reference panel: summary display of the references in your Library.

Preview window: shows you a summary of the selected reference, allows you to edit the reference and open any attached PDF.

CAPTURING REFERENCES

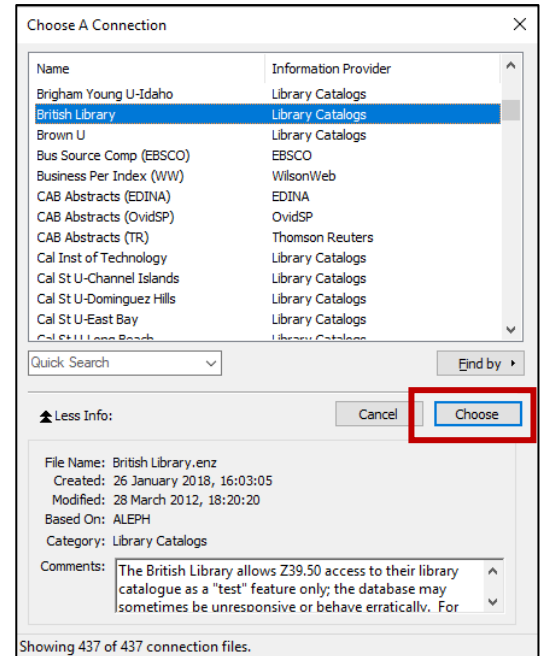
DIRECT CAPTURE FROM WITHIN ENDNOTE

You can perform online searches and capture references from within EndNote. This is useful when you know the book or journal reference you wish to capture. However this cannot be used as an alternative to a literature search in the database itself.



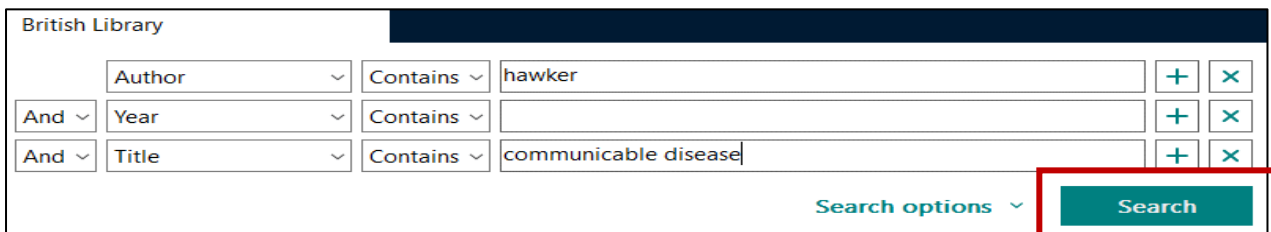
Select **Online Search** from the **Tools** menu or use the Online Search links on the left of the screen.

Clicking on **more...** will open a list of searchable libraries and databases. Select the most appropriate one for your needs and click **Choose**.

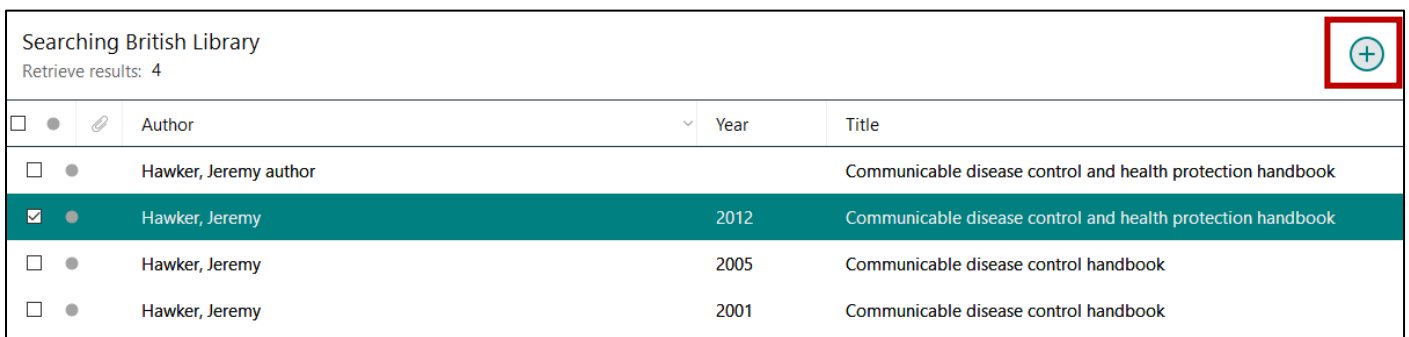


EndNote will then connect to the resource you have chosen and a search panel will open along the top.

Enter some key information for the reference you wish to find and click **Search**.



Click on the references you want to add to your library and click on the **+** icon. The selected reference will then be added to your references list.



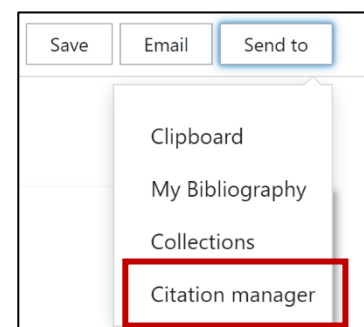
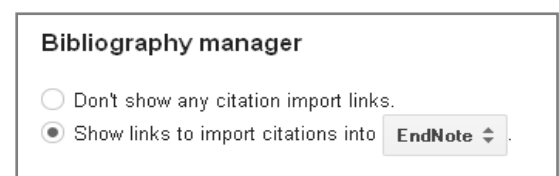
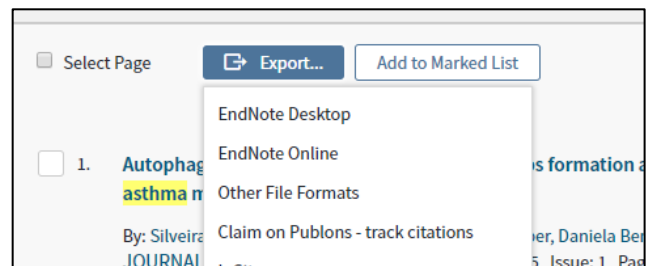
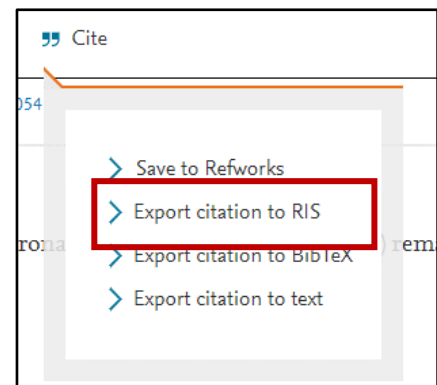
DIRECT EXPORT FROM DATABASES

Most databases have an option to export references directly to EndNote. These include:

- Business Source Complete
- Compendex
- IEEE Xplore
- JSTOR
- ScienceDirect
- The Web of Science
- Scopus
- Google Scholar
- PubMed

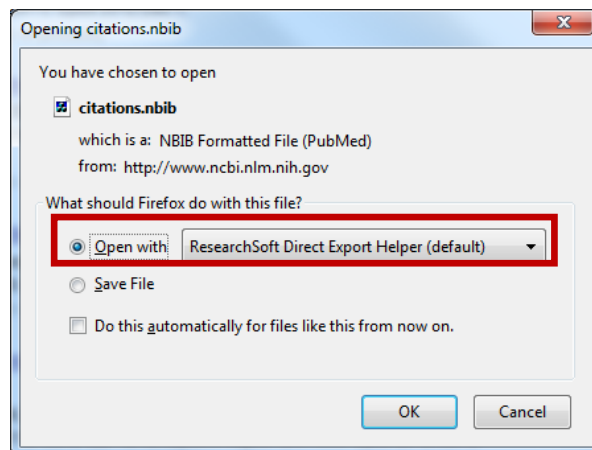
Firstly perform a search in the bibliographic database of your choice and select the references you wish to save in EndNote.

Look for an option to export or send your search results into EndNote. The wording for that option will vary from database to database. Here are some examples:



If prompted, choose to **Open with** and your selected references will automatically be imported into EndNote (you may have to select EndNote from the dropdown box if the 'Export Helper' does not automatically come up, and you may be asked to select your EndNote library and choose the correct filter).

If you file downloads automatically just open it to transfer your references into EndNote.



IMPORTING REFERENCES FROM A SAVED FILE

If you are unable to export results directly into EndNote you can save your results as a file then import this file to EndNote.

1. Firstly perform a **search** in the bibliographic database of your choice and **select** the references you wish to save in EndNote.

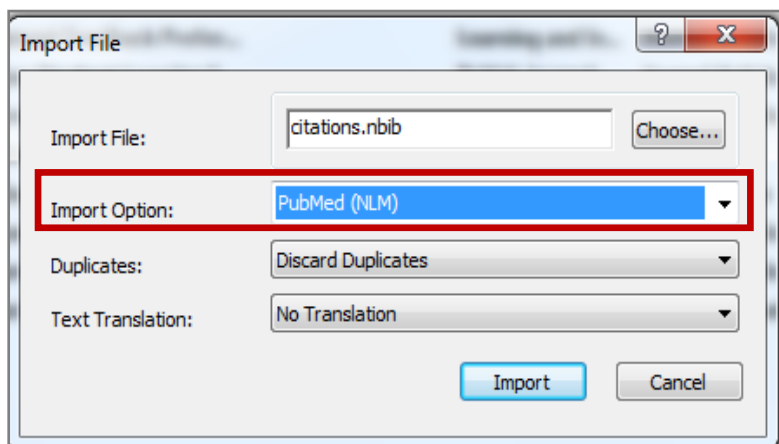
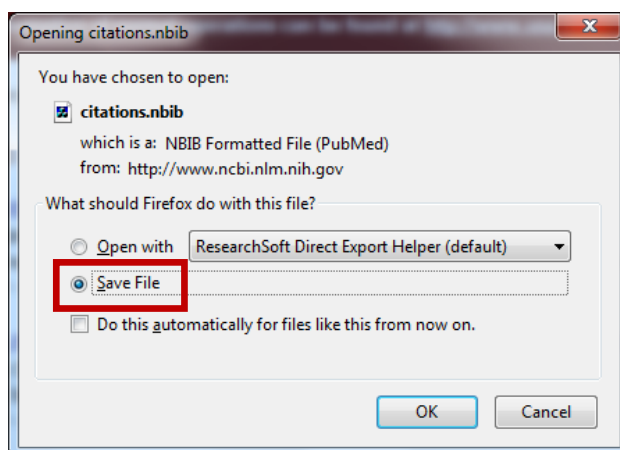
2. These references need to be **saved** to your computer as a file and in a format that EndNote will recognise.

Look for an option to export or send your search results into EndNote as in the **Direct Export** methods above.

3. Choose the **Save File** option and take note of the name of the saved file. Some browsers will automatically save you file into your downloads folder.

4. Having saved your search results go to EndNote and click on **Import** on the **File** menu and select **File**. The Import File dialog box will open.

Browse for your saved text file. This will usually be saved in the downloads or temp folder.



Select the correct import filter for the database you are importing from.

There is a generic filter called RefMan RIS, which will work for any file saved in the RIS format.

Then click on **Import**.

Your imported results will automatically be displayed and will appear in an **Imported References** folder in the **My Library** panel.

All References	10	
Imported References	3	
Recently Added	7	
Unfiled	10	
Trash	0	
MY GROUPS		
My Groups		
FIND FULL TEXT		
Found PDF	1	

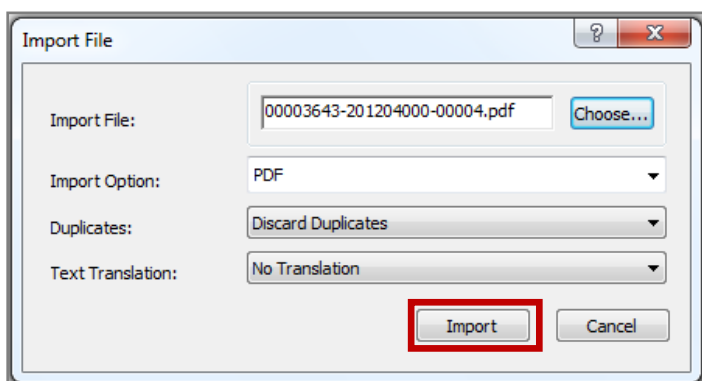
	Author	Year	Title
	Abrams, E. M.; t Jong, G. W.; Yang, C. L.	2020	Asthma and COVID-19
	Johnston, S. L.	2020	Asthma and COVID-19: Is asthma a risk fa
	Liu, S.; Zhi, Y.; Ying, S.	2020	COVID-19 and Asthma: Reflection During

To view **all** the references in your library just click on **All References**.

EXTRACTING AND IMPORTING REFERENCES FROM A PDF DOCUMENT / FOLDER

If you want to add the citation of a pdf document that you have saved on your computer EndNote may be able to grab the relevant data and add it to your EndNote library.

To do this click on **Import** in the **File** menu then select to import a file. You can also choose to import all the PDFs from a folder.



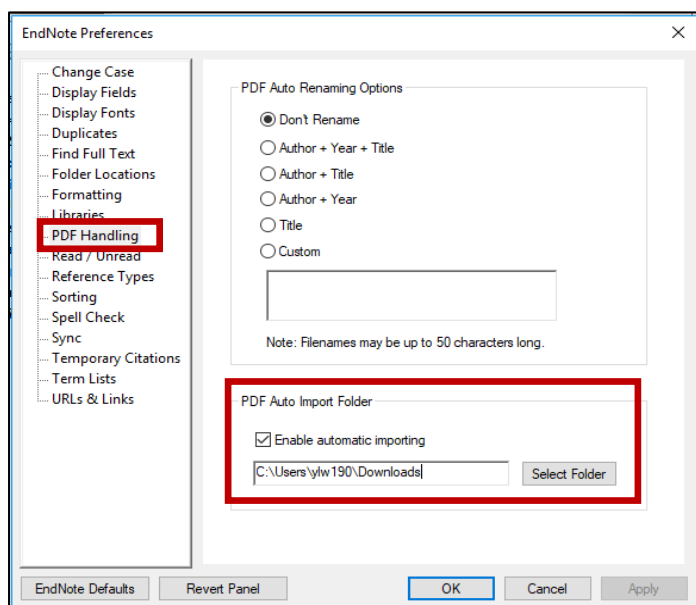
Browse for your saved pdf file / folder.

Choose **PDF** as the import option

Click on **Import**.

This will add the reference for that document to your library as well as a copy of the PDF. It should be noted that this does not work well for all pdf documents.

EXTRACTING AND IMPORTING REFERENCES FROM NEW PDF FROM A FOLDER AUTOMATICALLY



It is possible to configure Endnote to import references automatically from a chosen folder.

1. Open Preferences in the Edit menu.
2. Click on PDF handling.
3. Select your folder. Make sure to tick “enable automatic importing”.

Endnote will thereafter automatically scan your selected folder and create a new record whenever you add a PDF. You may need to restart Endnote for it to kick in.

ENTERING REFERENCES MANUALLY

A very last resort, when you cannot find a reference in an electronic format, is to enter it manually. This might be the case for references such as print theses, pamphlets, reports etc.



To do this you should click on **New Reference** in the **References** menu or click on the new reference icon.

Start by selecting the reference type using the dropdown box at the top of the blank record. The fields available depend on the type of reference you select.

Carefully type in the reference information.

- Be consistent
- Always type authors' names as shown
- EndNote will automatically suggest names that already exist in your library. Names NOT already in your library appear in red.
- Type a comma at the end of a corporate author's name.
- NEVER type anything in ***BOLD OR ITALICS!***

Author
Chen, Y. J.
Narsavage, G. L.

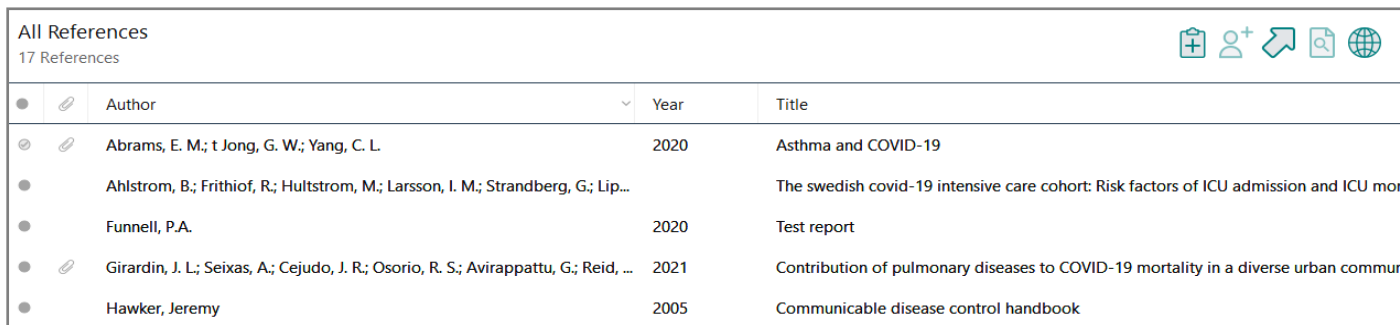
Author
Department of Health,

You will be prompted to save the reference when you close the new reference window.

MANAGING YOUR REFERENCES IN ENDNOTE

SORTING YOUR REFERENCES

Click on any column heading to sort the references, for example by author.



Author	Year	Title
Abrams, E. M.; t Jong, G. W.; Yang, C. L.	2020	Asthma and COVID-19
Ahlstrom, B.; Frithiof, R.; Hultstrom, M.; Larsson, I. M.; Strandberg, G.; Lip...		The swedish covid-19 intensive care cohort: Risk factors of ICU admission and ICU mor...
Funnell, P.A.	2020	Test report
Girardin, J. L.; Seixas, A.; Cejudo, J. R.; Osorio, R. S.; Avirappattu, G.; Reid, ...	2021	Contribution of pulmonary diseases to COVID-19 mortality in a diverse urban commu...
Hawker, Jeremy	2005	Communicable disease control handbook

SEARCHING YOUR ENDNOTE LIBRARY

This is very easily done by using the main search box above your references. There is also an advanced search option if you want to do a more specific search.



CREATING GROUPS WITHIN YOUR ENDNOTE LIBRARY

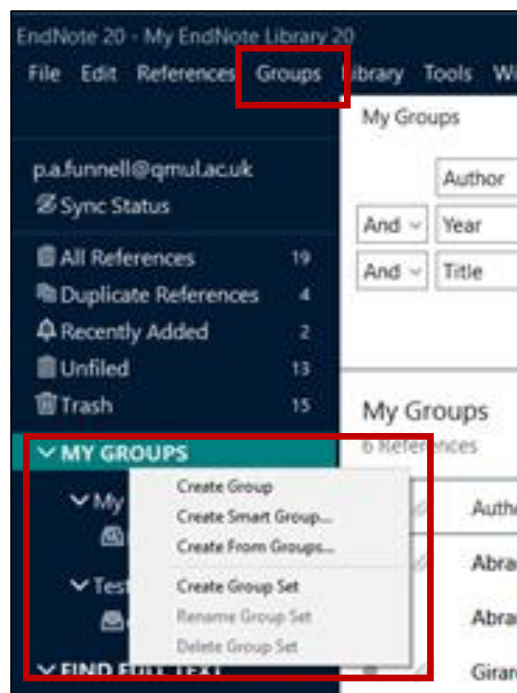
We recommend that you work with only one EndNote library. However within that library it is possible to separate and organise your references into groups. This is useful if you are working on more than one project.

Groups in EndNote can be created and managed either from the **Groups** menu or by right clicking on **My Groups** in the **My Library** panel.

If you select **Create Group** you will be prompted to name it and it will be displayed in the **My Library** panel. Right clicking on the group will give you the option of renaming it.

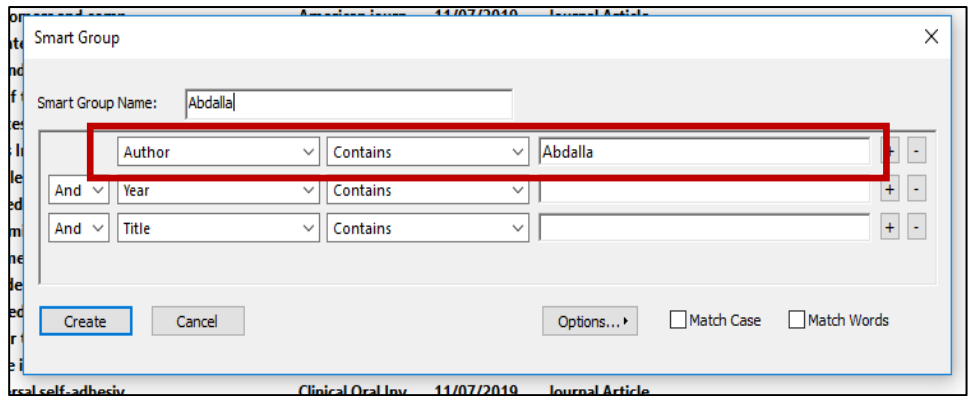
Adding references to groups is easily done by highlighting the reference(s) in the main panel that you wish to add to the group and dragging them with the mouse across to the group. If you hover over the group name a plus sign will appear and you can drop the references into the group.

It is also possible to highlight then right click on a reference and choose **Add References to**. A list of your groups will appear and you just select one to move that reference there.

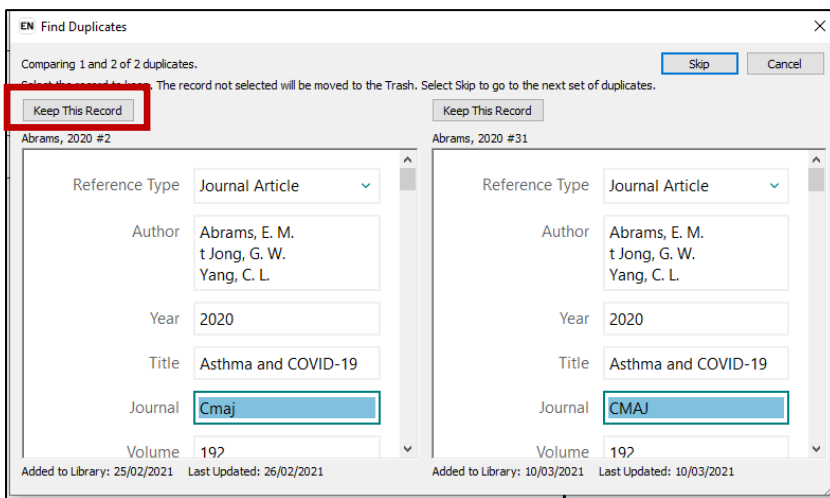


You can also set up Smart Groups, which will automatically add references matching a certain criteria, e.g. author.

Group sets enable you to arrange groups within a folder.



CHECKING FOR DUPLICATES



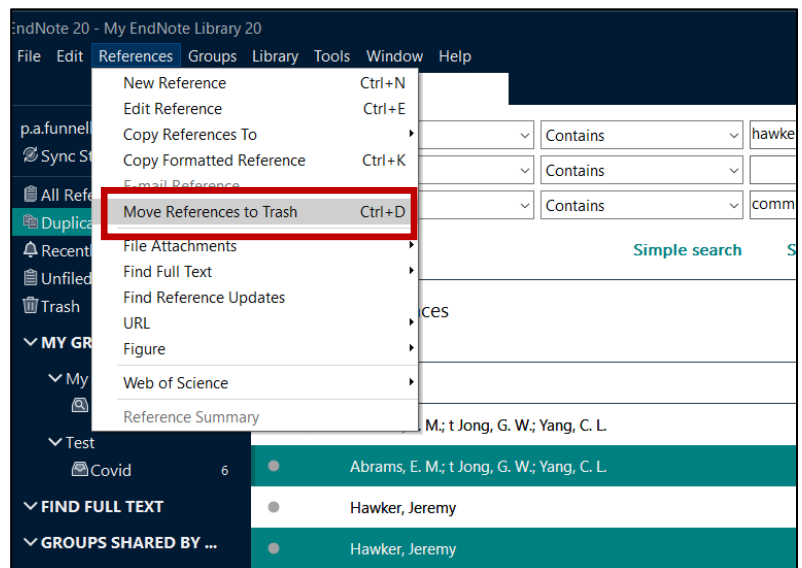
You can check and delete any duplicates in your EndNote library by selecting **Find Duplicates** on the **Library** menu. You can check for duplicates in your whole library, or an individual group.

You will be shown each duplicate and given the option of which you want to keep.

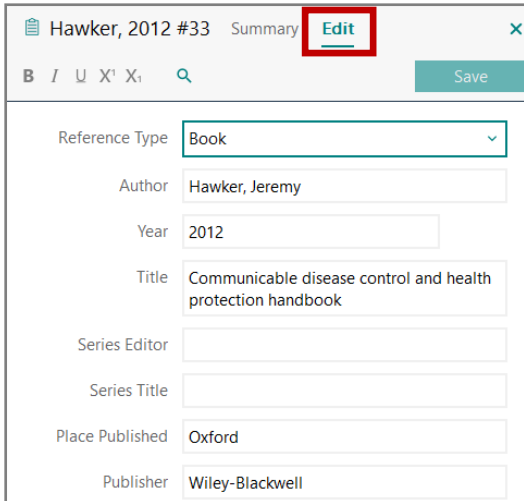
Alternatively, if want to delete duplicates in bulk, choose to **cancel**. You will then see the duplicates shown in a separate group with duplicates highlighted.

You can delete all the duplicates by right-clicking on one of the highlighted references, or going to the **References** menu, and choose to **Move References to Trash**.

Bear in mind that if you have duplicate references in different groups it does not specify which group the reference you're deleting is part of.



EDITING REFERENCES



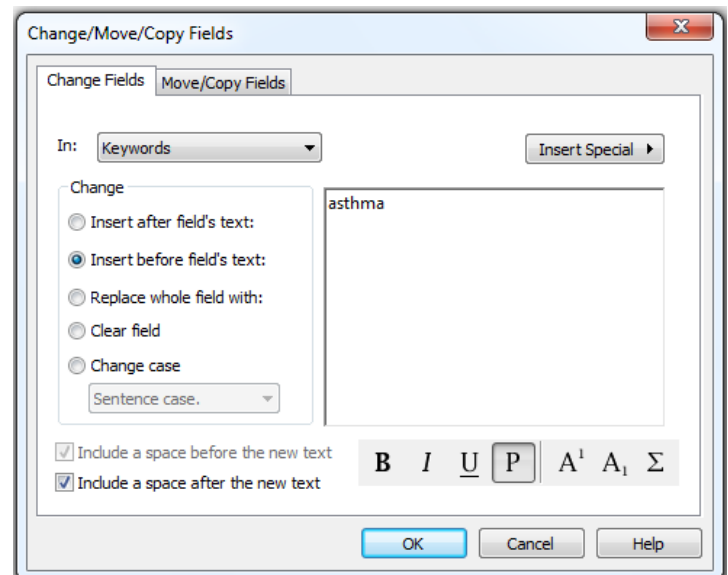
The screenshot shows a software interface for editing a reference. At the top, there is a title bar with 'Hawker, 2012 #33 Summary' and an 'Edit' tab highlighted in a red box. Below the title bar is a toolbar with icons for Bold (B), Italic (I), Underline (U), and other text formatting options, along with a 'Save' button. The main area contains a form with the following fields: Reference Type (Book), Author (Hawker, Jeremy), Year (2012), Title (Communicable disease control and health protection handbook), Series Editor, Series Title, Place Published (Oxford), and Publisher (Wiley-Blackwell).

Individual references can be edited by double-clicking on the references and choosing the **Edit** tab in the **Reference** preview panel on the right. This will allow you to make amendments or additions to individual fields. You can use spell check in the **Library** menu when you have a reference open for editing.

You might want to add the same information, for example a keyword, to a group of references. To do this:

- Add all the references you want to modify to a group and make sure you are viewing that group.
- Click on **Change/Move/Copy Fields** on the **Tools** menu.
- Type the text to be added and specify which field this should be placed in, then click on **OK**.

Your keyword will be added to each of the references in that group.



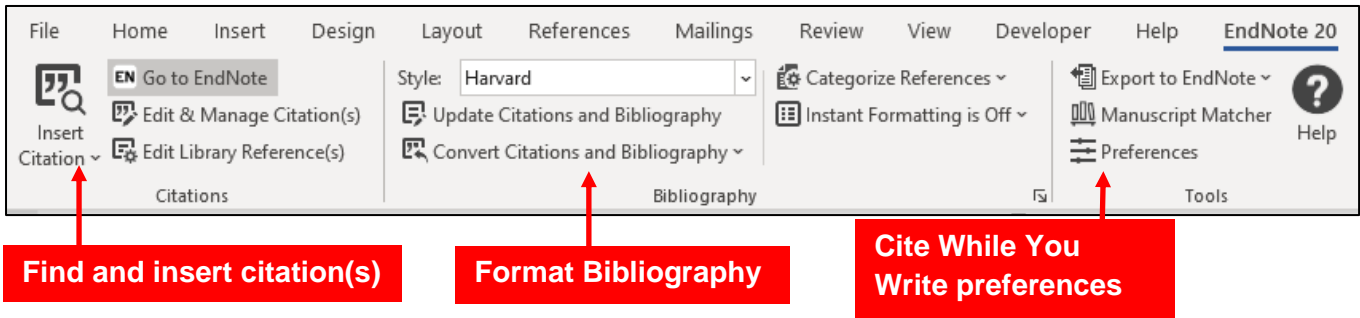
The screenshot shows a dialog box titled 'Change/Move/Copy Fields'. It has two tabs: 'Change Fields' and 'Move/Copy Fields'. The 'In:' dropdown is set to 'Keywords'. There is an 'Insert Special' button. Under the 'Change' section, there are radio buttons for 'Insert after field's text:', 'Insert before field's text:' (which is selected), 'Replace whole field with:', 'Clear field', and 'Change case'. A 'Sentence case.' dropdown is also present. A text input field contains the word 'asthma'. At the bottom, there are checkboxes for 'Include a space before the new text' and 'Include a space after the new text', both of which are checked. A toolbar with icons for Bold (B), Italic (I), Underline (U), Paragraph (P), and other text formatting options is visible. The dialog box has 'OK', 'Cancel', and 'Help' buttons at the bottom.

USING YOUR ENDNOTE REFERENCES

CITE-WHILE-YOU-WRITE

EndNote can revolutionise the way you write a paper. The **Cite While You Write** toolbar for Microsoft Word makes inserting citations into your text and building a bibliography simple.

When the EndNote software is installed on your computer this toolbar should automatically appear as a new tabbed menu in the ribbon when you launch Microsoft Word. If the EndNote toolbar does not appear automatically, see www.endnote.com/support/faqs/endnote.



Inserting a citation in a Microsoft Word document

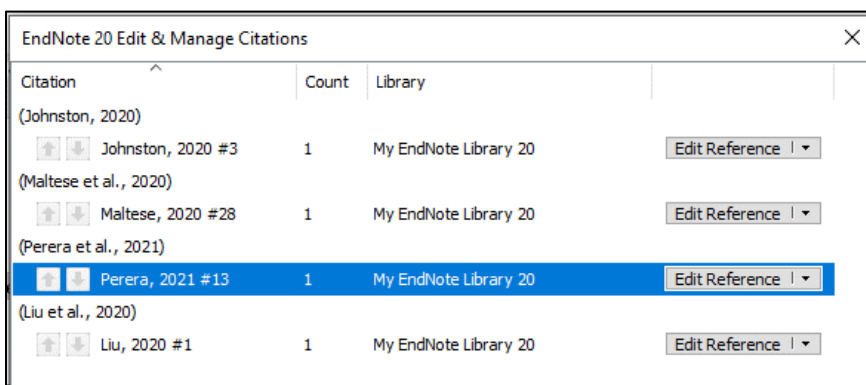
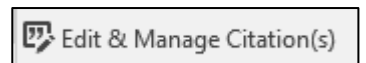
Place the cursor in your Word document where you wish the reference to be inserted:

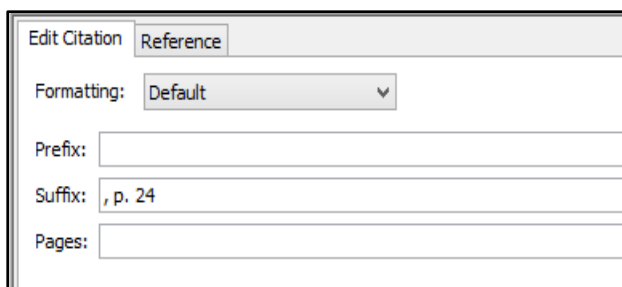


1. Click on the **Insert Citation** icon on the toolbar. This will open a dialogue box where you can search your EndNote library for the citation you require. Highlight the correct citation and click on **Insert**. It will automatically be inserted wherever you have positioned your cursor in Word.
2. Highlight the citation you want in your EndNote library. From the toolbar in Word open the drop down menu under the **Insert Citation** icon and choose **Insert Selected Citation(s)**.
3. Place your cursor where you want the reference to appear in Word. From your EndNote library select the reference you want to insert and then click on **Insert** at the bottom of the summary panel.

Editing Citations

You can use the **Edit and Manage Citation(s)** option to edit citations already inserted into your document. Highlight the reference in the text and click on this option. A window will open which will allow you to edit the details of the citation.

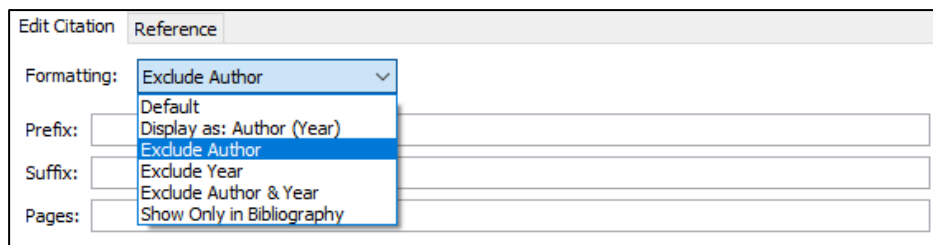




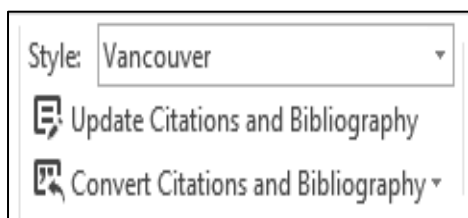
You can add page numbers to your citation by entering them in the **Suffix** field in this Edit window. Note that the page numbers will be inserted immediately after your existing citation, so it is advisable to add some punctuation BEFORE the page numbers, for example a comma, a space and then 'p.'

For references in footnotes, use the **Pages** field instead.

You can also change the formatting of the in-text citation, for example if you include the author's surname within the text and just want the date to appear in brackets.



Update citations and bibliography

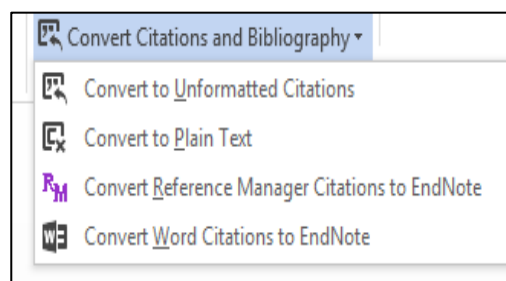


If you wish to change the citation style used in your document you can do this using the **Style** drop-down box. Select the output style you wish to use. The citations in your document as well as the bibliography will automatically be updated to the new style. Further styles can be added to this list from a wide range of styles by choosing **Select another style** from the drop-down box.

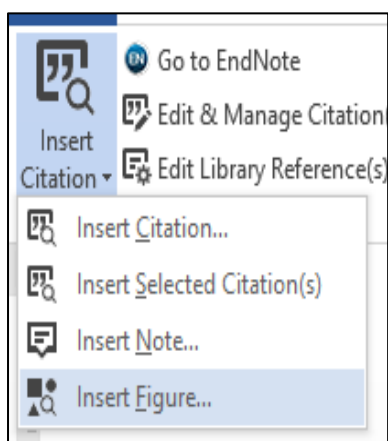
Unformatting Citations

EndNote automatically formats citations in the style you have currently selected. You may prefer to wait until you have finished writing to format your citations. This is important if you are planning to work on several documents and then merge them together.

If you wish to un-format the citations in your document click on **Convert Citations and Bibliography** in the EndNote toolbar and select **Convert to Unformatted Citations**.



Inserting figures (specified in the Figure field of references in your library)



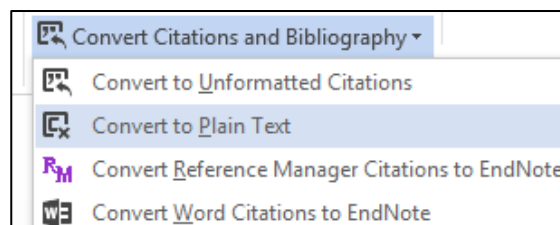
Click on the **Insert Citation** icon and select the **Insert Figure** icon. Search for the figure in your library the same way as you search for references. Highlight the figure you wish to insert and click on **Insert**. EndNote will add the image caption beneath the image and a reference to the figure or table within your text.

Inserting notes

Journals using the Vancouver system (such as *Science*) sometimes require that you include notes along with the numbered references in your bibliography. Under **Insert Citation** select **Insert Note**. Type your note text into the text box and click on **OK**.

Removing field codes

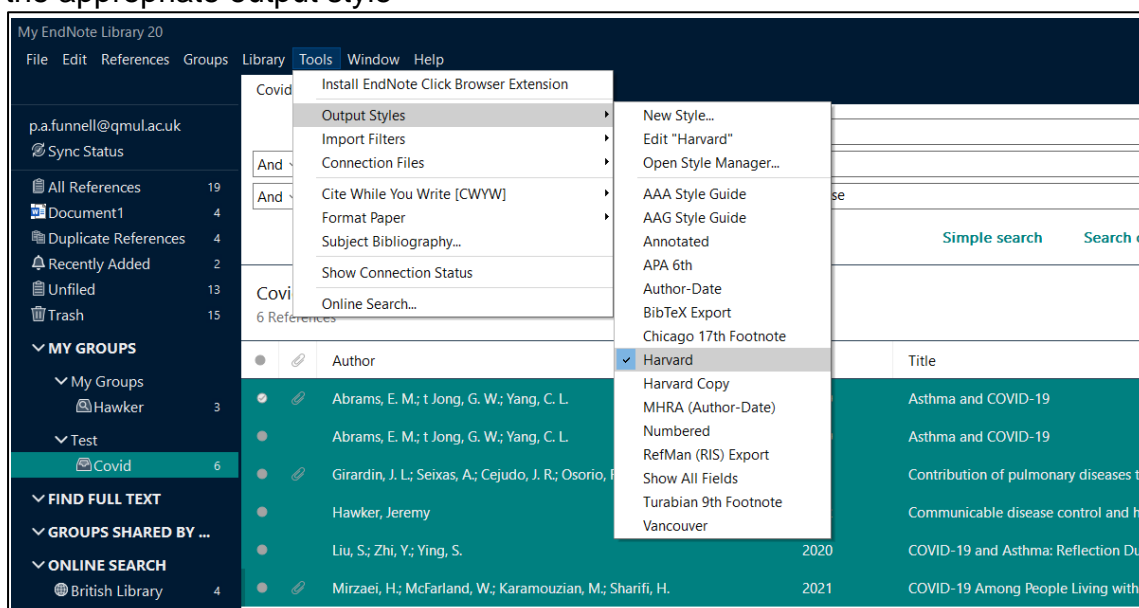
If your publisher requires your work to be submitted in plain text the EndNote toolbar allows you to strip the document of the field codes. Click on **Convert Citations and Bibliography** and then select **Convert to Plain Text**. Then save the stripped document under a new name. You will no longer be able to edit the citations in the document.



CREATING A STANDALONE BIBLIOGRAPHY

On some occasions you may wish to create a bibliography of references not associated with a piece of work, for example to share with a colleague.

- Select the references you want to include in your bibliography and from the **Tools** menu choose the appropriate output style



- In the **References** menu click on **Copy Formatted Reference** to copy the highlighted references to the Clipboard (or right-click on one of the references you have highlighted and click on **Copy Formatted Reference**).
- Switch to Word and paste the references into your Word document.

Alternatively the highlighted references can also be dragged to a Word document if you hold down the **Control** key while dragging and dropping them.

CREATE A SUBJECT BIBLIOGRAPHY

You can create a bibliography containing references grouped by keyword, author or any other information in your library – ideal for creating a reading list:

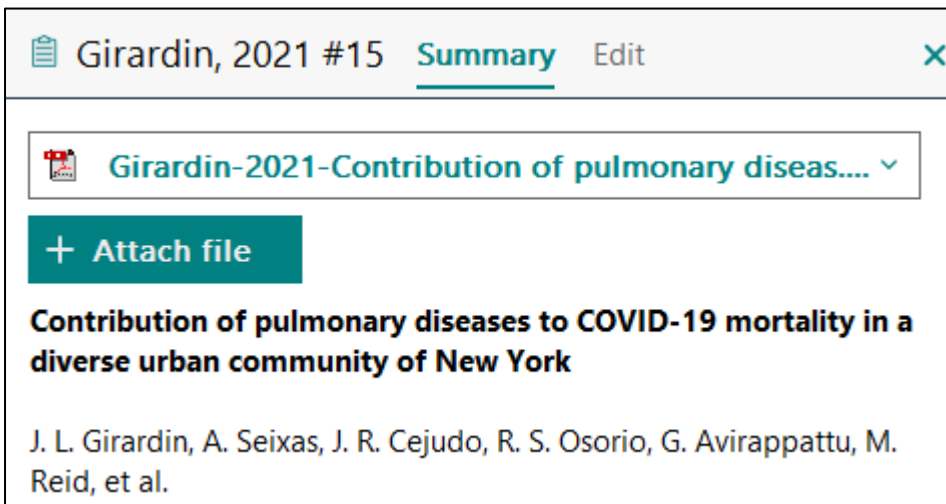
- Click on **Subject Bibliography** in the **Tools** menu.
- Select which fields you want to group your references by (e.g. Year).
- Click on **OK** and a list of all the different terms will be displayed along with the number of references associated with each term.
- Highlight one or more terms (or click on **Select All**) and click **OK** to display the references in the selected style.

OTHER FEATURES OF ENDNOTE

LINKING TO AN IMAGE OR A PDF FILE ON YOUR COMPUTER

You can browse for a file on your computer and then drag and drop it onto an EndNote reference. Alternatively, if you double click on your chosen reference you can add an attachment from either the **Summary** or **Edit** panels on the right.

The attachment will be displayed in the **Summary** panel and will also appear in the File Attachments field of your reference. You can also open the attachment from these locations.



EndNote Preferences are set by default to display a paper clip icon in the first column of the library window to denote that a reference is linked to a file.

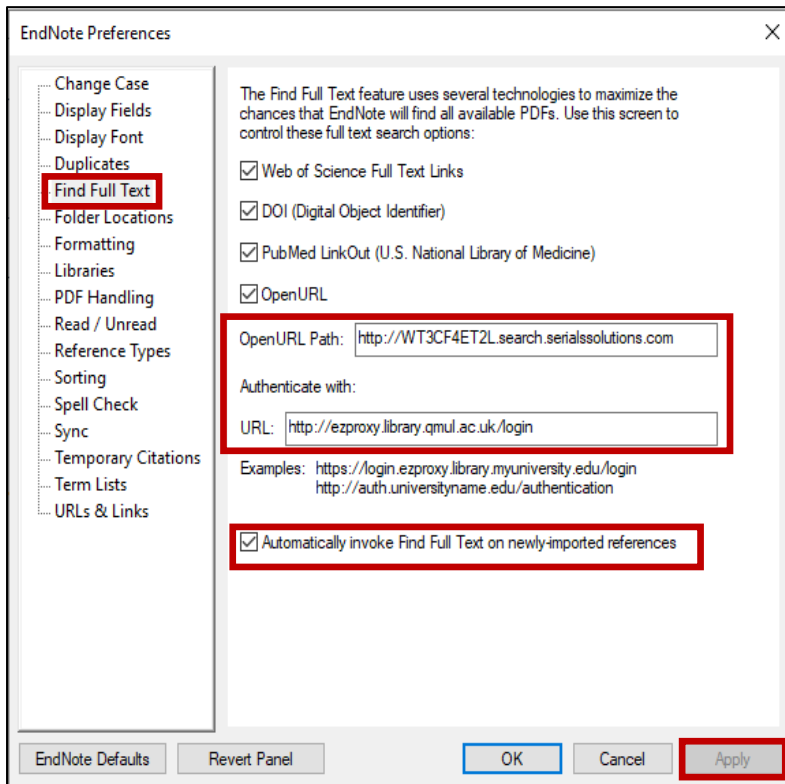
LINKING TO A FIGURE STORED ON YOUR COMPUTER

You can also attach an image, chart or table to the figures field for citing later as a figure using Cite While You Write. Select the reference you want to attach the figure to, then from the **References** menu select **Figure** then **Attach Figure**.

LINKING TO THE FULL TEXT OF THE REFERENCES IN YOUR ENDNOTE LIBRARY

You can search the internet for the full text of your references, and attach the PDF. To do this you need to configure EndNote as shown. By default EndNote will search across open access articles provided by Web of Science and PubMed, as well as searching for the DOI (Digital Object Identifier). You can also configure EndNote to search across the University's subscription.

On the **Edit** menu select **Preferences** and make the following changes:



Select Find Full Text


Type the following URL into the **OpenURL Path** box:

<http://resolver.ebscohost.com/openurl>

In order to automatically authenticate for access to full text resources available through the University, you should add the following in the **Authenticate with** box:

<http://ezproxy.library.qmul.ac.uk/login>

Click on **Apply**

You can choose for EndNote to automatically search for full text on newly imported references. Otherwise you will need to select references and click on the icon  to check for full text.

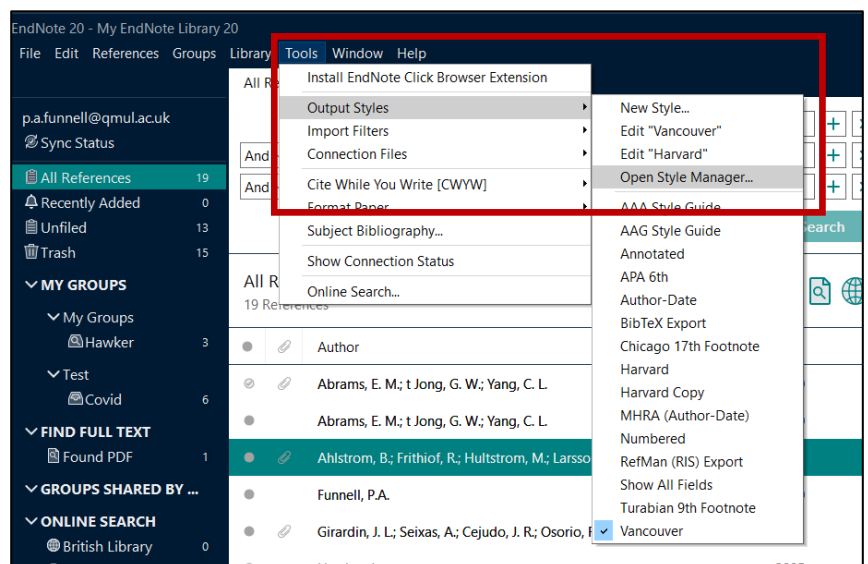
EndNote will then attach PDFs of available articles

CREATING A NEW OUTPUT STYLE

You can try and create a new style from scratch, but it is usually much easier to modify an existing style:

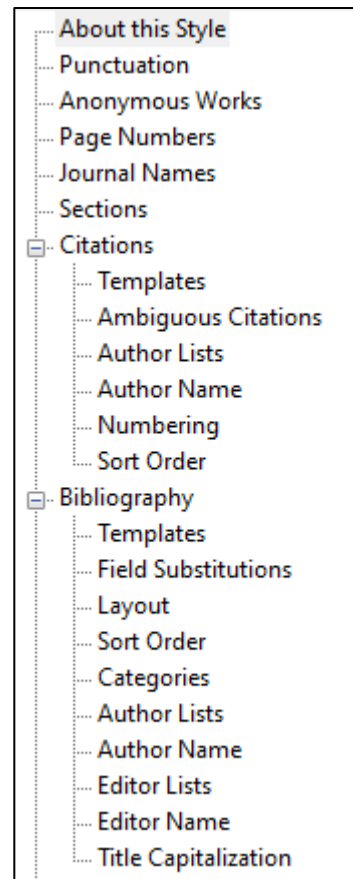
Find an existing style that is as close to what you want as possible:

- On the **Tools** menu select **Output Styles** and click on **Open Style Manager**.
- Click on **Style Info/Preview** to toggle between **Info** and **Preview** mode
- When you have found a style similar to the one you need click the **Edit** button to open the style editor window.



To edit the style:

- Before you change anything, click on the **File** menu and click on **Save As** to save the style under a new name (this will keep the original style unchanged).
- Edit the sections you need to change. You can change settings such as the number of author names you want to appear in your in-text citations or bibliography.



SHARING REFERENCES

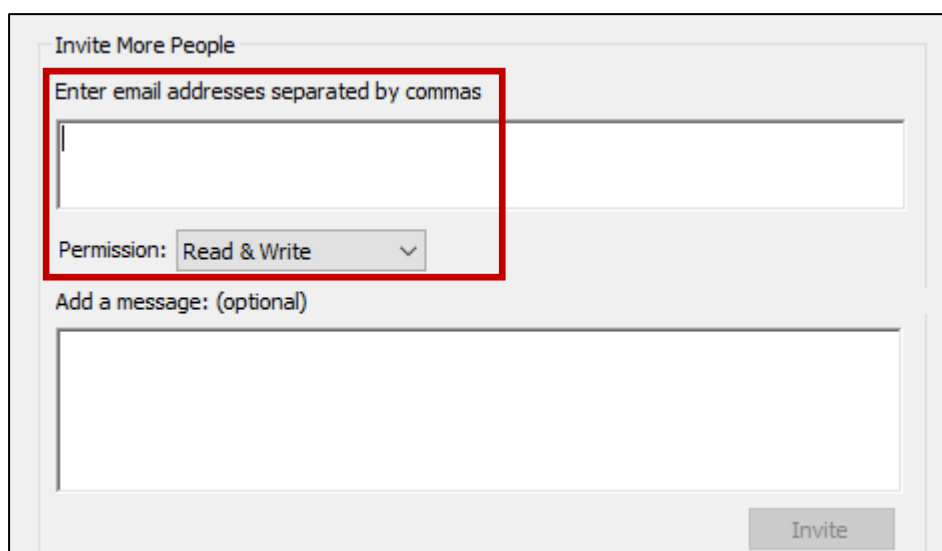
SHARING YOUR LIBRARY OR GROUPS

You can share your entire library with up to 100 other EndNote users by going to **Share...** from the **File** menu. Please note that you and your recipients will need EndNote Online accounts to enable sharing and your EndNote library will need to be synced with your online account.

You can also share individual groups of references, which might be useful if you're collaborating on a particular project. To share a group, click on the **Share this group** icon.



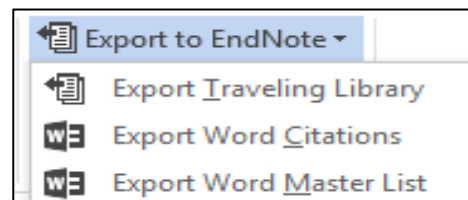
When you share your library, or a group, you will need to provide email addresses of those you want to share with. You can choose to give them Read Only access, or Read & Write access, which will enable them to add, modify or delete references.

A screenshot of the 'Invite More People' dialog box in EndNote. The dialog has a title bar 'Invite More People'. Below it is a text input field with the placeholder text 'Enter email addresses separated by commas'. Below the input field is a dropdown menu labeled 'Permission:' with 'Read & Write' selected. Below the dropdown is a text input field labeled 'Add a message: (optional)'. At the bottom right of the dialog is an 'Invite' button. A red rectangular box highlights the email input field and the 'Permission:' dropdown menu.

SHARING YOUR WORD DOCUMENT WITH THE TRAVELLING LIBRARY

When you insert references in a Word document with **Cite While You Write** the formatted citations in Word include data from your EndNote library that is stored in hidden field codes, that allows the document to be turned into a **Travelling library** that you can share with colleagues. When you send your Word document to other EndNote users, they can add references to the document from their own EndNote libraries, and they can even import your references from the document into their own EndNote library. All they have to do is:

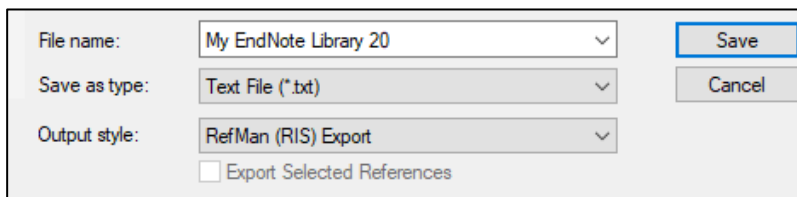
- Open the document in Word.
- Click on the **Export to EndNote** icon on the toolbar and select **Export Travelling Library**.
- Specify whether they wish to export to an existing EndNote library or to a new one.



EXPORTING YOUR ENDNOTE LIBRARY

You can export your references as a file, for example to import into another reference management tool.

- Select the references you want to export (or you can export your whole library).
- On the **File** menu click on **Export**.
- Choose the appropriate output style. EndNote Export will enable the file to be imported into another EndNote Library. RefMan (RIS) export and BibTeX export are common styles for use with other reference management tools.



File name:	My EndNote Library 20	Save
Save as type:	Text File (*.txt)	Cancel
Output style:	RefMan (RIS) Export	
	<input type="checkbox"/> Export Selected References	

The file you have saved can then be shared with someone else.

SAVING A COPY OF YOUR ENTIRE ENDNOTE LIBRARY PLUS ANY LINKED IMAGES AND PDFS

The references in your EndNote library are stored in a .ENL file (e.g. mylibrary.enl), and the images or PDFs you might have linked to your references are stored in the .DATA folder found in the same folder as your library.

To easily save a copy of all of the required library files and folders, and save disk space, you can create a compressed mylibrary.enlx file (the mylibrary.enlx file includes the mylibrary.enl library file as well as its associated .DATA folder and all of its contents):

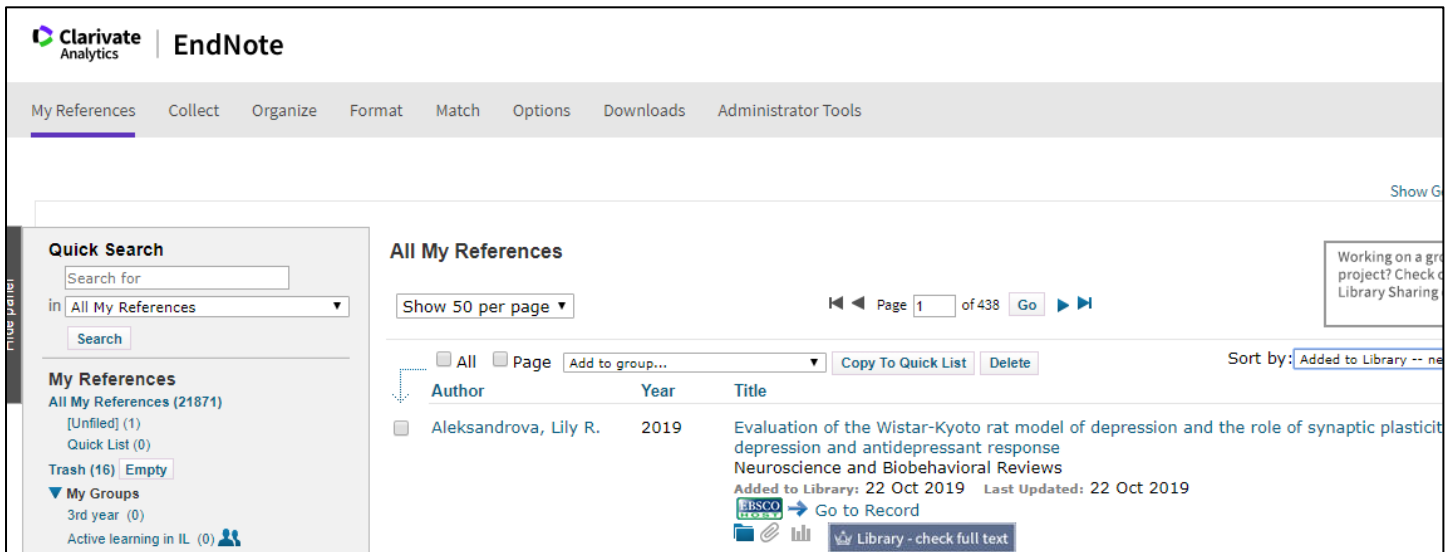
- In EndNote in the **File** menu select **Compressed Library** and **Create**.

The recipient of your compressed library will be able to use EndNote to open the mylibrary.enlx file, which will extract the .ENL file and the DATA folder to the same folder where the .enlx file is located. They will then be able to open the .ENL file as they normally would to use the library.

This is also the way to create a backup copy of your EndNote library.

ENDNOTE ONLINE

In addition to the desktop version of EndNote there is also a web based version and the two are fully compatible. The web address is my.endnote.com and you will need to sign up for an account.



Collect

References can be captured directly from library catalogues or electronic databases using the **Online Search** function. References already saved from online databases can be imported from your computer.

Organize

You can create groups and then organise your references. Groups can be shared with colleagues.

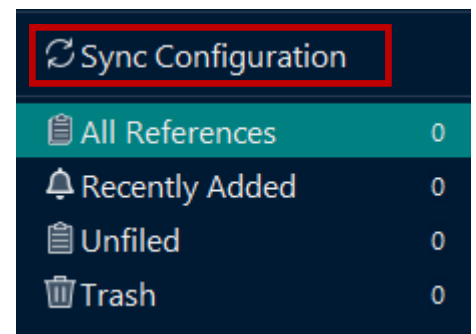
Format

You can create standalone bibliographies, or use **Cite While You Write** when writing papers. You have to download a plug-in for Microsoft Word which will add a new toolbar to this application. Do this by selecting the **Format** tab and clicking on **Cite-While-You-Write**. Note that you will not need to download the toolbar if you already have the desktop version installed on your computer.

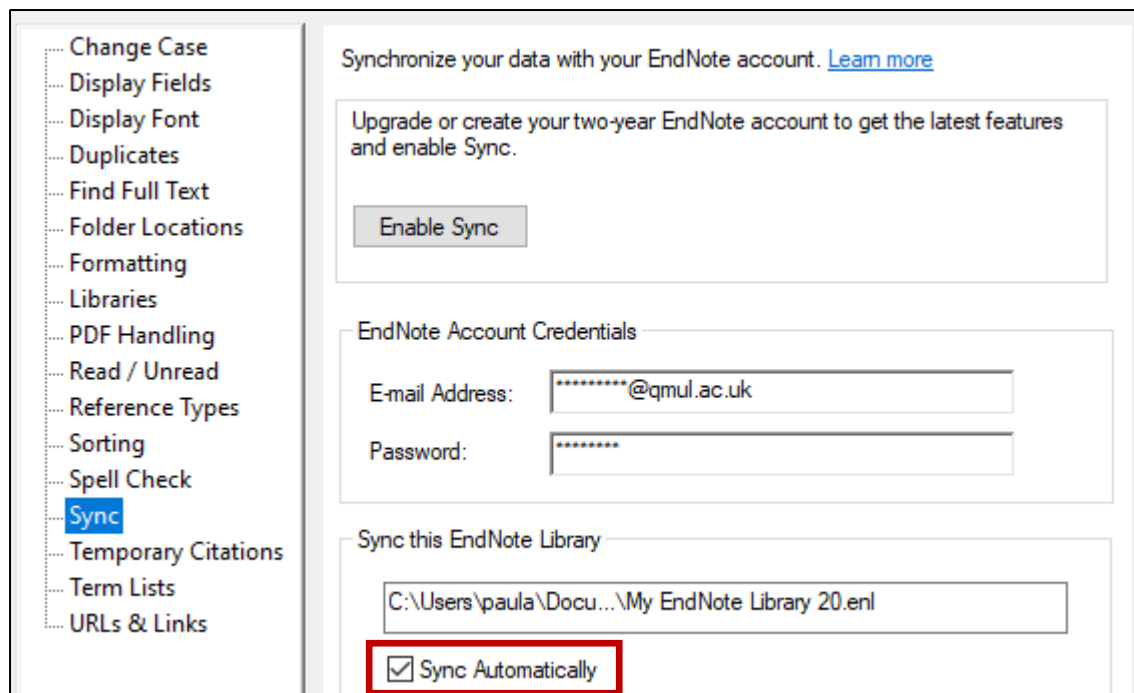
Synchronise

You can choose to synchronise your desktop and online libraries by choosing **Sync** in the **Library** menu in EndNote or clicking on the **Sync Configuration** button.

You will need to enter your EndNote Online credentials and will then be asked whether you wish to transfer references between the two applications.



You can change the sync preferences from the **Edit** menu. You can choose to sync your library automatically. If you don't check this box you will need to manually sync each time.



Change Case
Display Fields
Display Font
Duplicates
Find Full Text
Folder Locations
Formatting
Libraries
PDF Handling
Read / Unread
Reference Types
Sorting
Spell Check
Sync
Temporary Citations
Term Lists
URLs & Links

Synchronize your data with your EndNote account. [Learn more](#)

Upgrade or create your two-year EndNote account to get the latest features and enable Sync.

Enable Sync

EndNote Account Credentials

E-mail Address: *****@qmul.ac.uk

Password: *****

Sync this EndNote Library

C:\Users\paula\Docu... \My EndNote Library 20.enl

Sync Automatically

TROUBLESHOOTING

First try EndNote's excellent built-in help system.

For specific questions, try the following resources from Clarivate:

- Technical knowledge base: <https://support.clarivate.com/Endnote>
- Manuals: https://clarivate.libguides.com/endnote_training/users/en20

SUPPORT

For the latest EndNote information, news and updates, including EndNote connection files, filters and styles, visit www.endnote.com.

For further help and advice with using EndNote go to <https://www.qmul.ac.uk/library/endnote/endnote-for-the-desktop> or get in touch with your Liaison Librarian. Contact details can be found within the Subject Guides at <https://www.qmul.ac.uk/library/subject-guides>.

Revised: 13.06.2022