



Guide to **EndNote**

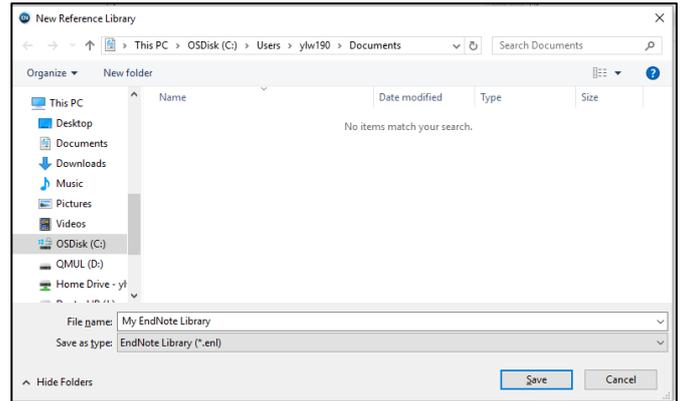


- **Capture bibliographic references from online databases**
- **Build your personal library of references and images**
- **Generate bibliographies in any style of your choice**
- **Watch the bibliography appear as you write your paper**

GETTING STARTED WITH ENDNOTE

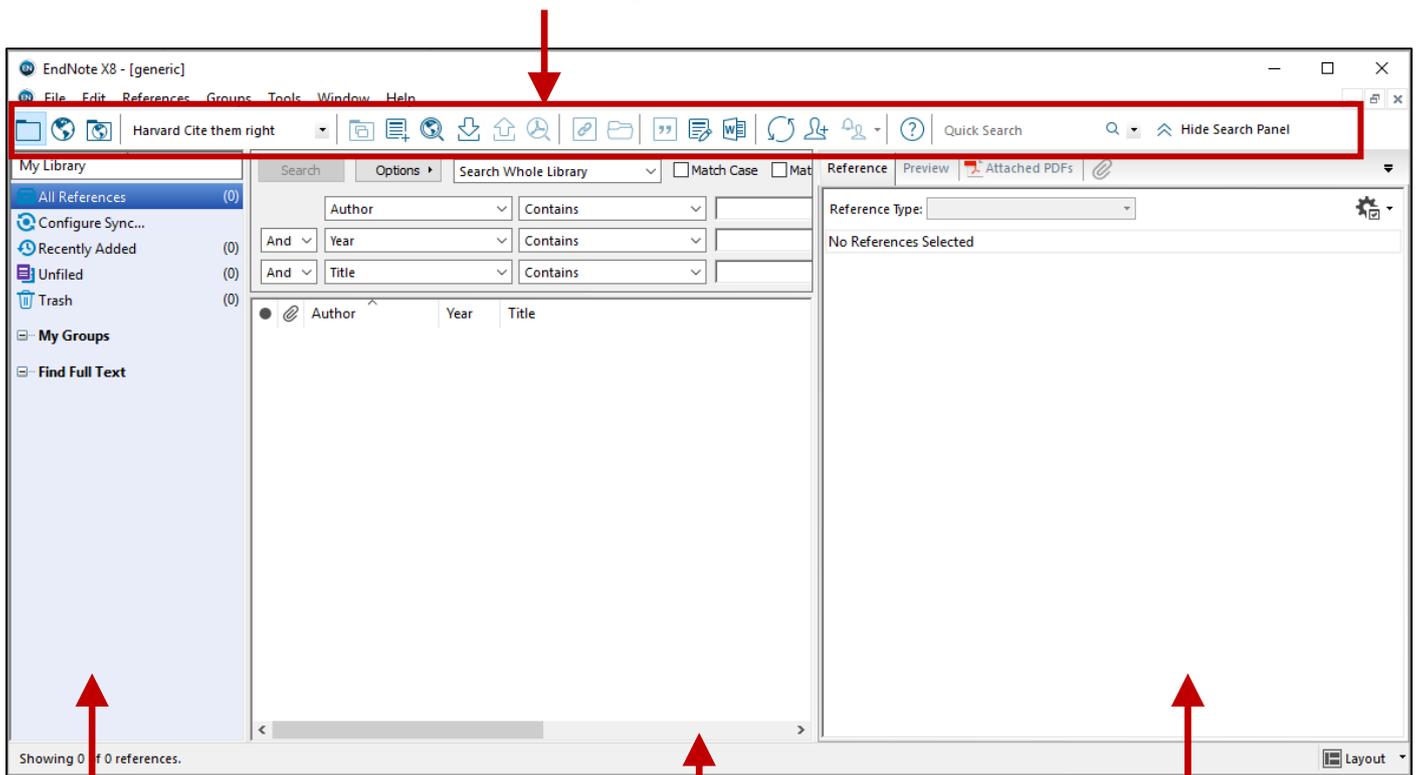
When you open EndNote for the first time you have to create your own EndNote library before you can get started. You do this by going to the **File** menu and selecting **New**.

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



ENDNOTE LIBRARY

Toolbar: contains icons for adding, using and formatting references as well as a search box for searching within your EndNote library.



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

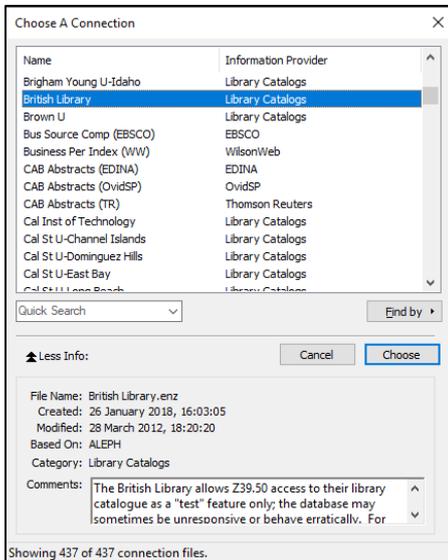
Reference panel: summary display of the references in your Library.

Preview window: shows you the details of a selected reference, a preview of how it will look in your bibliography or any attached PDFs

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 icon in the toolbar.



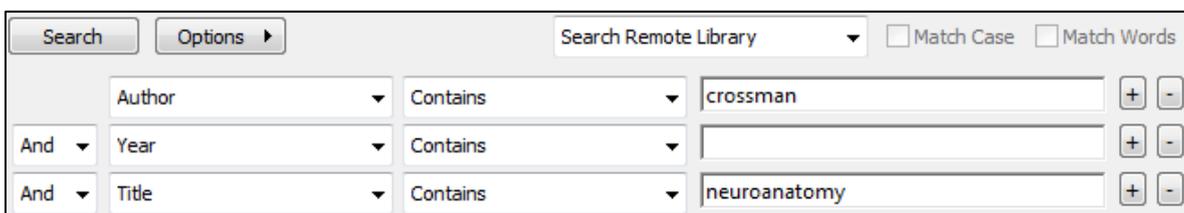
This will open a list of searchable libraries and databases. Select the most appropriate one for your needs and click **Choose**.

Alternatively you can choose a library or database from the **Online Search** section of the **My Library** panel on the left hand side.



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**.



When prompted click **OK** to retrieve all records found.

If you are in the **Integrated Library & Online Search Mode**



the results of this search will automatically populate your EndNote library. You can delete the ones you do not want by highlighting them and pressing delete.

If you are in the **Online Search Mode**



your results will be added to a temporary library. You can copy them across to your main library by highlighting the references you want to keep and choosing **Copy References To** from the **References** menu, or by right clicking, and choosing your EndNote library.

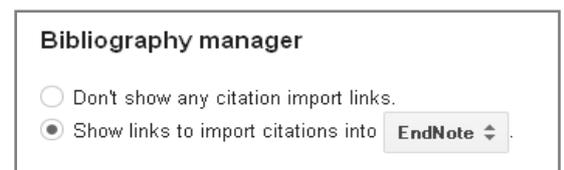
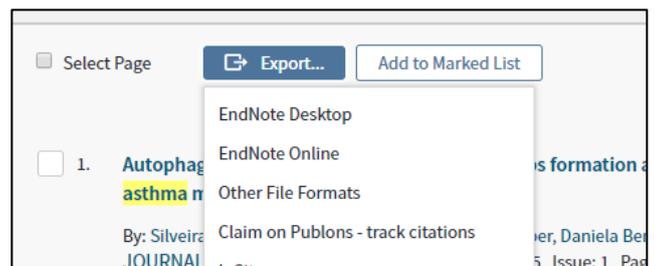
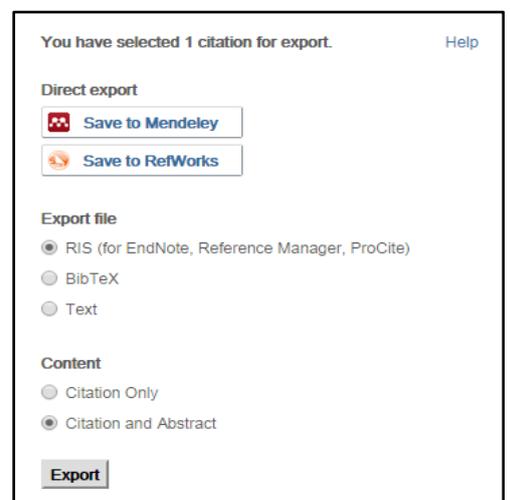
DIRECT EXPORT FROM DATABASES

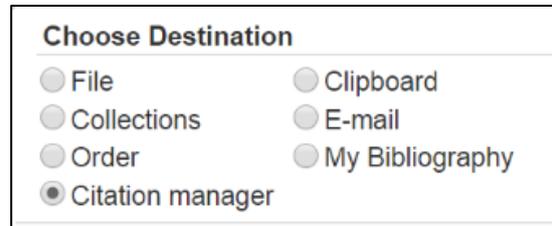
Most databases have an option to export references directly to EndNote. These include:

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

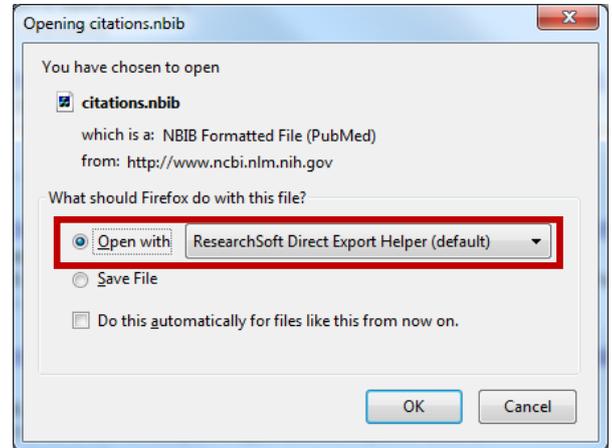
Firstly perform a search in the bibliographic database of your choice and select the references you wish to save in EndNote.

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





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).



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.

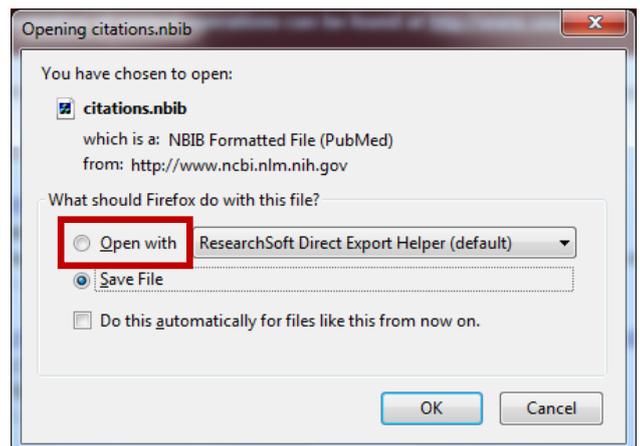
1. Firstly perform a **search** in the bibliographic database of your choice and **select** the references you wish to save in EndNote.
2. These references need to be **saved** to your computer as a file and in a format that EndNote will recognise.

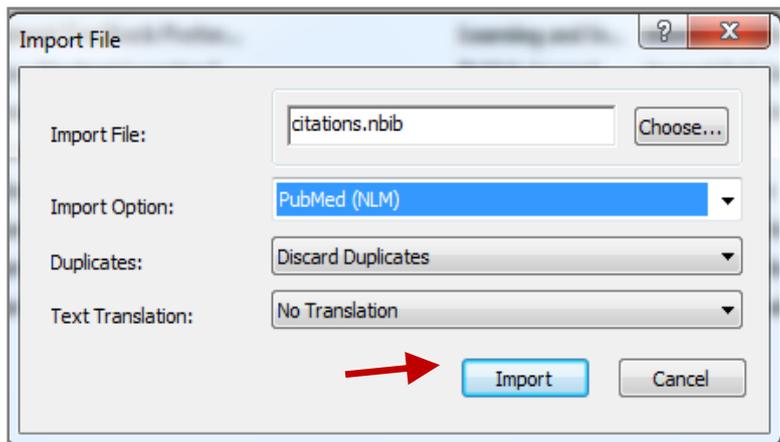
Look for an option to export or send your search results into EndNote as in the **Direct Export** methods above.

3. Choose the **Save File** option and take note of the name of the saved file

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

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

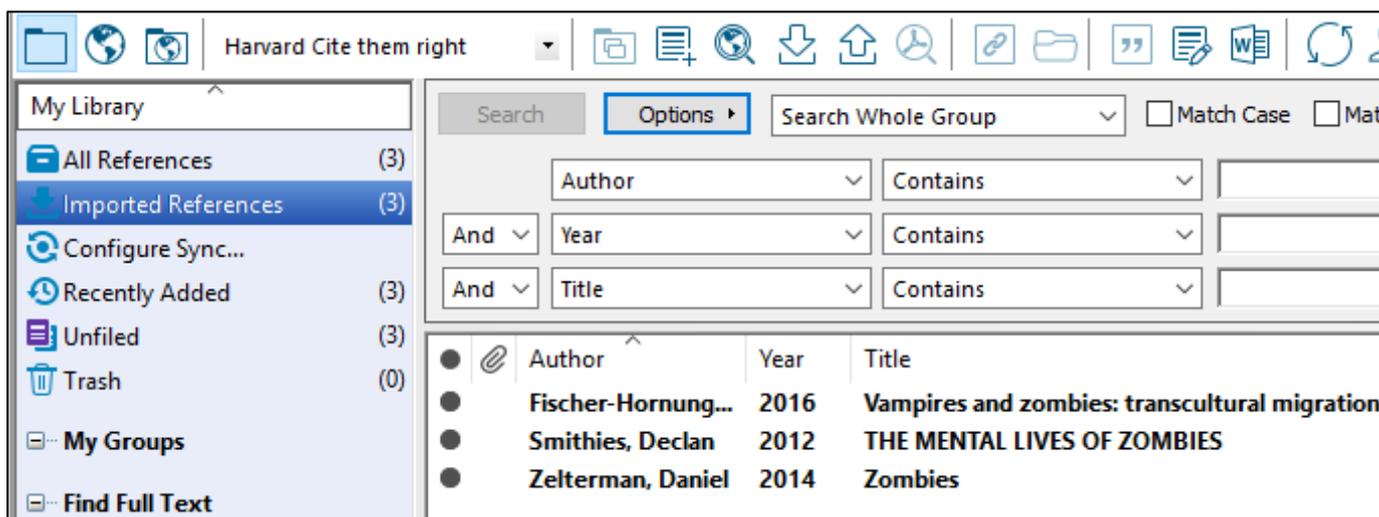




Select the correct import filter for the database you are importing from

Then click on **Import**.

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

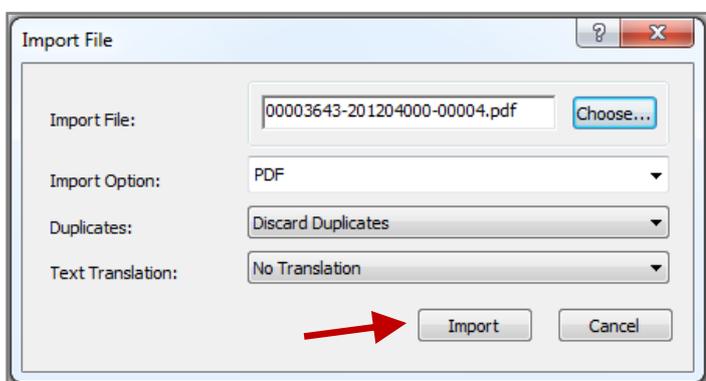


To view **all** the references in your library just click on **All References**.

EXTRACTING AND IMPORTING REFERENCES FROM A PDF DOCUMENT

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.



Browse for your saved pdf file.

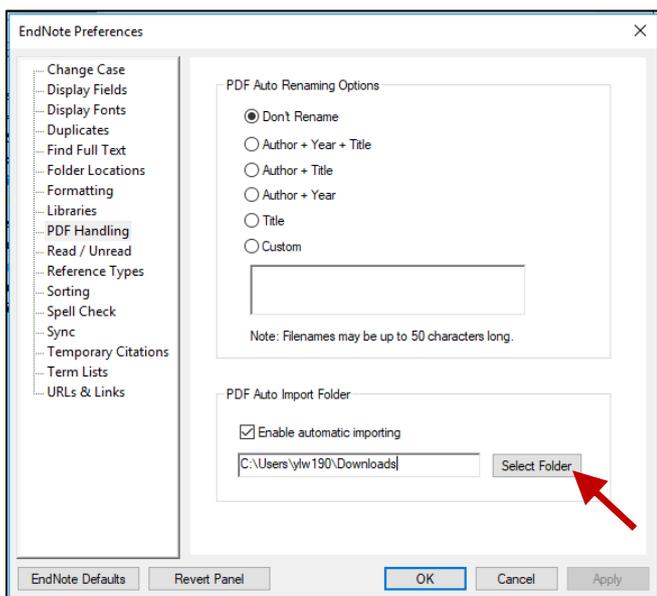


Choose **PDF** as the import option

Click on **Import**.

This will add the reference for that document to your library as well as a link to where the pdf is stored on your computer (see page 12). 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 will usually be the case for web pages.



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.

Reference Type: Journal Article

- 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

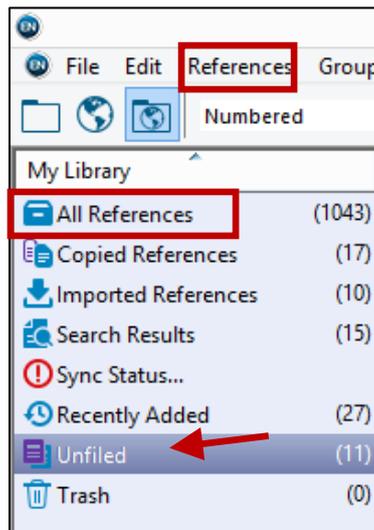
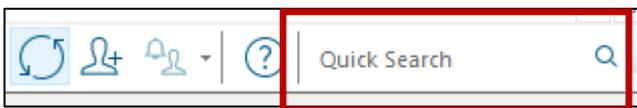
SORTING YOUR REFERENCES

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

	Author	Year	Title	Rating	Journal	Ref Type
●	Alfa, M. J.; Olson,...	2012	Alkaline detergent combined with a routine w...		Am J Infect Co...	Journal Article
●	Al-Maskari, M. Y....	2012	Assessment of quality of life in patients with ty...		Saudi Medical J...	Journal Article
●	Ansurudeen, I.; S...	2012	Carnosine enhances diabetic wound healing in ...		Amino Acids	Journal Article
●	Benson, Angela D.	2003	Assessing Participant Learning in Online Enviro...		New Direction...	Journal Article
●	Crossman, A. R.; ...	2010	Neuroanatomy : an illustrated colour text			Book

SEARCHING YOUR ENDNOTE LIBRARY

This is very easily done by using the search option on the toolbar



CHECKING FOR DUPLICATES

You can check and delete any duplicates in your EndNote library by selecting **Find Duplicates** on the **References** menu.

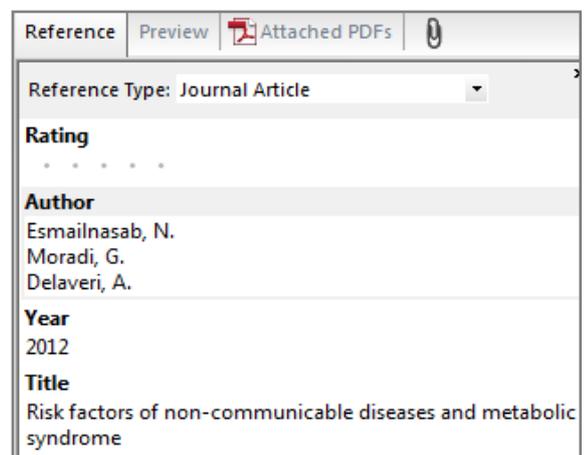
Bear in mind that even when you create groups there will always be an **All References** list where every reference you have captured will stay.

Unfiled will contain all the references that you have not added to a group.

Groups will be displayed along with the number of references they contain.

EDITING REFERENCES

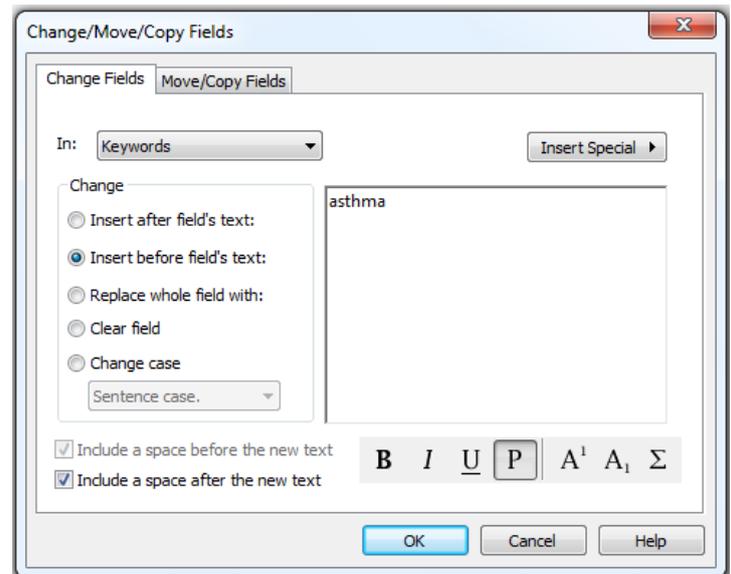
Individual references can be edited in the **Reference** preview panel on the right or by double clicking on a reference in the main panel. This will allow you to click on individual fields and make amendments or additions. You can use spell check in the **Tools** menu when you have a reference open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



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

- Highlight the references in question.
- Click on **Show Selected References** on the **References** menu (EndNote will only change the displayed references).
- 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 selected references.



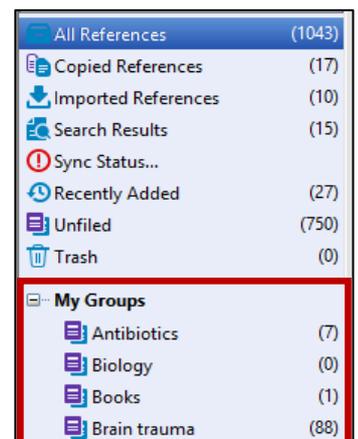
CREATING GROUPS WITHIN YOUR ENDNOTE LIBRARY

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 highlighting and right clicking on **My Groups** in the **My Library** panel.

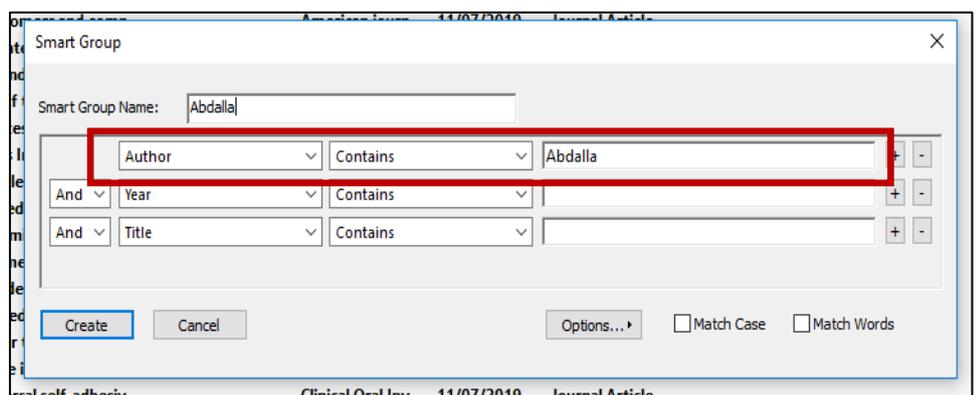
If you select **Create Group** you will be prompted to name it then it will be displayed in the **My Library** panel. Highlighting and right clicking on the group will give you the option of renaming it.

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.

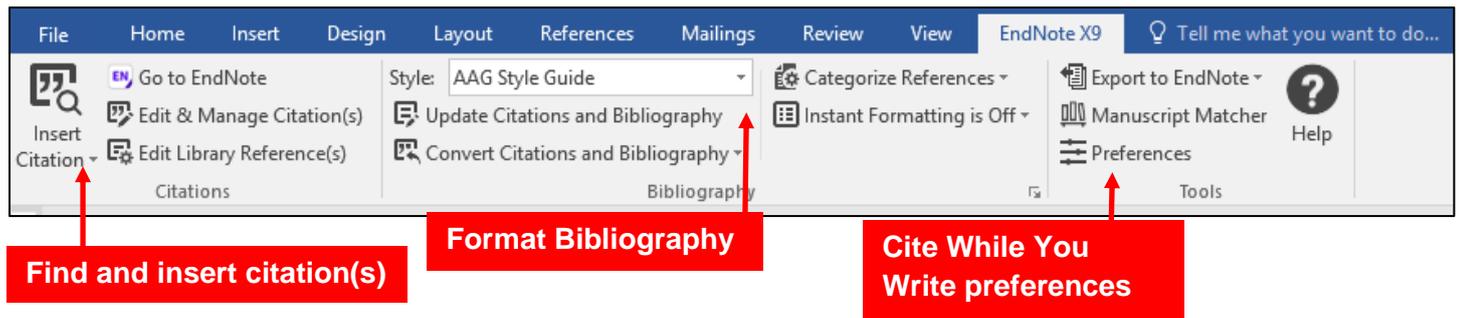


USING YOUR ENDNOTE REFERENCES

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/fags/endnote.



Inserting a citation in a Microsoft Word document

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

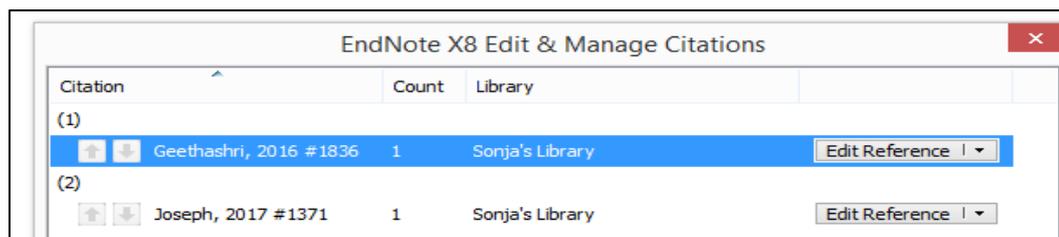


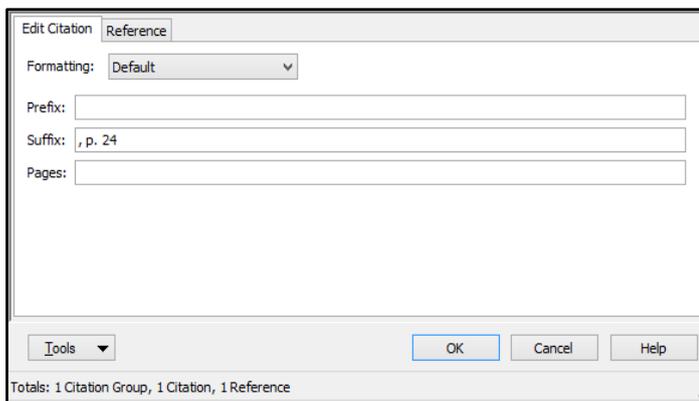
1. Click on the **Insert Citation** icon on the toolbar. This will open a dialogue box where you can search your EndNote library for the citation you require. Highlight the correct citation and click on **Insert**. It will automatically be inserted wherever you have positioned your cursor in Word.
2. 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. In EndNote, highlight the reference you wish to use and click on the **Insert Citation** icon in your EndNote library toolbar. The reference will be automatically inserted into your document.



Editing Citations and adding page numbers

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.

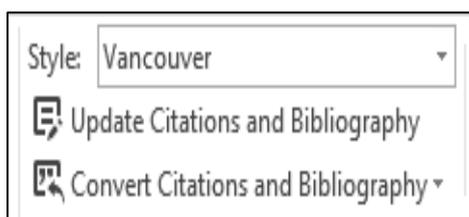




You can also add page numbers to your citation by entering them in the **Suffix** field in this Edit window. Note that when you click on **OK** the page numbers will be inserted immediately after your existing citation. For clarity it is thus advisable to add some punctuation BEFORE the page numbers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

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

Update citations and bibliography

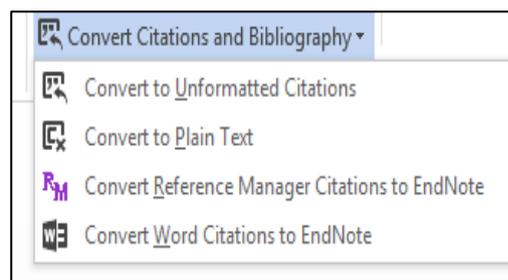


If you wish to change the citation style used in your document you can do this using the **Style** drop-down box. Select the output style you wish to use. The citations in your document as well as the bibliography will automatically be updated to the new style. Further styles can be added to this list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

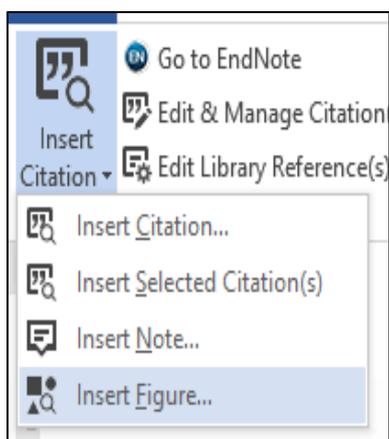
Unformatting Citations

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)



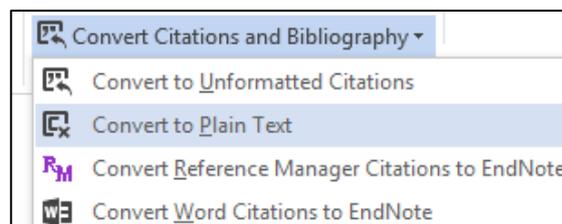
Click on the **Insert Citation** icon and select the **Insert Figure** icon. Search for the figure in your library the same way as you search for references. Highlight the figure you wish to insert and click on **Insert**. EndNote will add the image caption beneath the image and a reference to the figure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

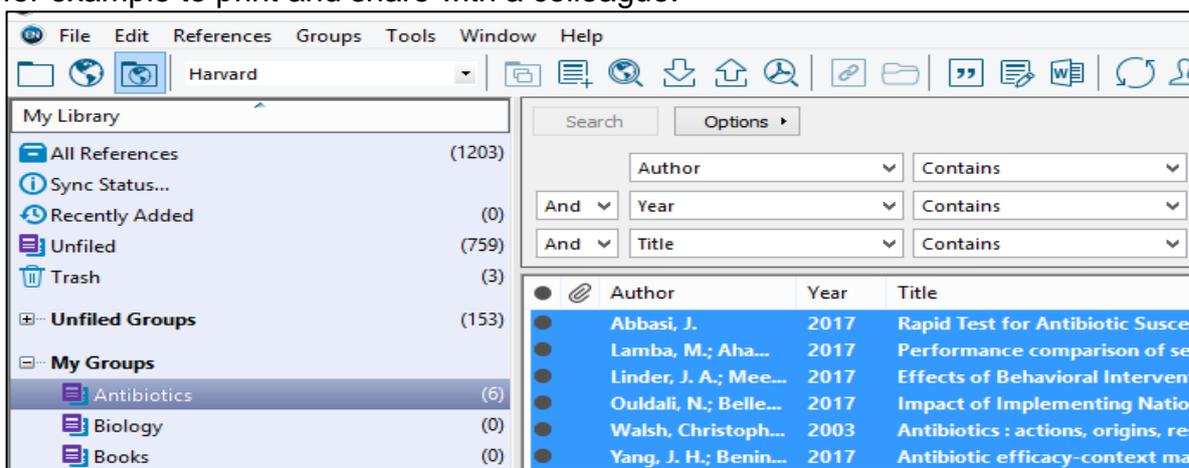
Removing field codes

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 print and share with a colleague.



- Firstly select a style from the drop-down style list on the toolbar.
- Then highlight the desired references.
- In the **Edit** menu click on **Copy Formatted** to copy the highlighted references to the Clipboard (or right-mouse click on one of the references you have highlighted and click on **Copy Formatted**).
- 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.

You can also create and save a rich text file of your selected references by clicking on **Export** in the **File** menu and selecting to save in **Rich Text Format**. This document will be readable by Word.

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

Simply use **My Computer**, find the file then drag and drop it to an EndNote reference.

Alternatively:

- Select a reference, then on the **References** menu select **File Attachments** and **Attach File**.
- Select the file you want to link to, then click on **Open**.

An icon and a link to the file will be inserted in the File Attachments field of your reference. The file will open when you open (double-click) the reference and click on the icon. You will be able to see a preview of any attached PDF in the preview window on the right. You can also print the PDF from this window.



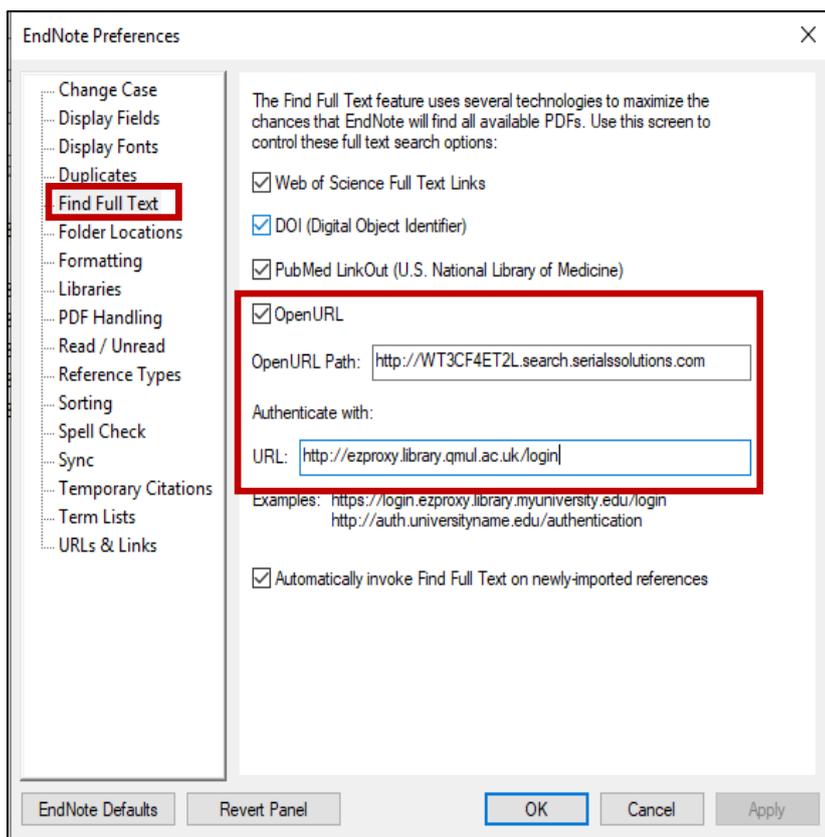
EndNote Preferences are set by default to display a paper clip icon in the first column of the library window to denote that a reference is linked to a file.

LINKING TO A FIGURE STORED ON YOUR COMPUTER

Similarly, to link to a figure, select a reference then on the **References** menu select **Figure** then **Attach Figure**.

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

As an alternative to storing PDF files on your PC you can link to the full text of a reference on the internet. To do this you need to configure EndNote as shown:



On the **Edit** menu select **Preferences**

Select **Find Full Text**

To link to full text articles available from Queen Mary type the following URL into the **OpenURL Path** box:

<http://WT3CF4ET2L.search.serialssolutions.com>

If you use EndNote off campus enter <http://ezproxy.library.qmul.ac.uk/login> in the **Authenticate with: URL** box. This will ask you to log in with your Queen Mary credentials in order to link to the full text.

Click on **Apply**

CREATING A NEW OUTPUT STYLE

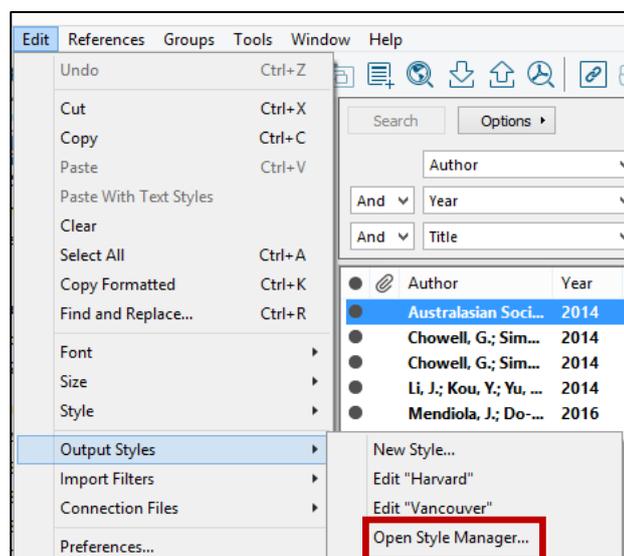
You can try and create a new style from scratch, but it is usually much easier to modify an existing style:

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

- On the **Edit** 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.

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 – especially the Templates for Citations and Bibliography.

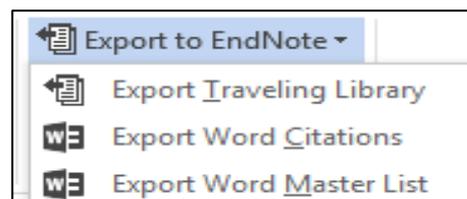


SHARING REFERENCES

SHARING YOUR WORD DOCUMENT WITH THE TRAVELLING LIBRARY

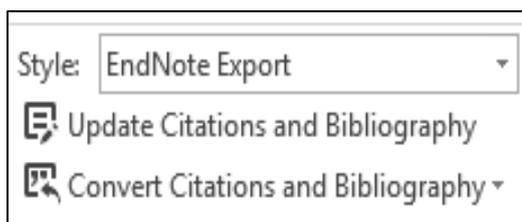
When you insert references in a Word document with **Cite While You Write** the formatted citations in Word include data from your EndNote library that is stored in hidden field codes, that allows the document to be turned into a **Travelling library** that you can share with colleagues. When you send 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 a copy of your entire EndNote library as a plain text file (this will not include any images or PDFs you might have linked to your references):



- Select **EndNote Export** from the drop-down style list on the toolbar. (N.B. To export to Reference Manager or ProCite, select the RefMan (RIS) style.)
- On the **File** menu click on **Export**.
- Give your file a name then click on Save.

The file you have saved can then be sent to someone, perhaps as an email attachment.

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.

The screenshot shows the EndNote Online web interface. At the top, there is a navigation bar with 'My References' selected. Below this, there is a 'Quick Search' sidebar on the left with a search box and a dropdown menu. The main area is titled 'All My References' and displays a table of search results. The first result is by Aleksandrova, Lily R. (2019) titled 'Evaluation of the Wistar-Kyoto rat model of depression and the role of synaptic plasticity depression and antidepressant response'. The interface includes various controls like 'Show 50 per page', 'Page 1 of 438', and 'Sort by' options.

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**.

Synchronise

You can choose to synchronise your desktop and web libraries by choosing **Sync** in the **Tools** menu in EndNote or simply by clicking on the blue button on the toolbar.



If not already logged into the online version of EndNote you will then be prompted to login. You will then be asked whether you wish to transfer references between the two applications.

TROUBLESHOOTING

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

If the EndNote toolbar does not appear in Microsoft Word after installing EndNote, see: www.endnote.com/support/faqs/endnote.

For specific questions, try the following resources from Adept Scientific:

- Technical knowledge base: <https://support.clarivate.com/Endnote>
- Manuals: https://clarivate.libguides.com/endnote_training/users/enx9

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.library.qmul.ac.uk/endnote/endnote-for-the-desktop/> or get in touch with your Academic Liaison Librarian. Contact details can be found under the Subject & Support pages at <http://www.library.qmul.ac.uk/subject-guides/>

Revised: 22.04.2020