A guide to using EndNote 20

Contents

If you require this information in an alternative format (ie large print, braille or audio format), please contact any library enquiry desk or telephone (0113) 343 5663 and staff will make the necessary arrangements

UNIVERSITY OF LEEDS

Introduction

EndNote helps you collect and store all the references you have found from different sources. You can use your EndNote library to insert in-text citations and create bibliographies within Microsoft Word documents, reformatting them into your chosen referencing style.

If this is your first time using EndNote, we recommend you go through this whole guide in order.

This guide assumes that you are using EndNote with Word 2016 and Internet Explorer, though you can use any other browser.

By the end of this guide you should be able to:

- Create an EndNote library

- Add references to your library

- Use your EndNote library to insert in-text citations and create a bibliography in Microsoft Word 2016

- Effectively organise your EndNote library

Top tips to keep in mind when using EndNote

1. Use one EndNote library for your course, whole PhD or projects you are working on, and use the groups feature in EndNote to organise your references. We would only recommend you create multiple EndNote libraries if you are working on a number of different research projects (Using groups: part 3, section 1).

2. Always save a back-up copy of your EndNote library by selecting File > Save a copy.

3. Check for duplicates on a regular basis. Having duplicate references in your EndNote library can cause a number of problems, especially when you start to reference your work. (Checking for duplicates: part 3, section 2).

4. Even when using EndNote, it is important to check that the references are appearing properly in your work by comparing them with the official referencing guidelines for your style: library.leeds.ac.uk/referencing. If a reference is not appearing correctly in Word, there may be errors in the actual reference in the EndNote library. You will need to edit the reference details (Creating a bibliography: part 2, section 3).

Part 1: Creating and adding references to an EndNote library

1. Opening EndNote and creating an EndNote library

These instructions describe using EndNote 20 on a computer in an IT cluster.

1. Click **Start** (or the Windows icon at the bottom-left of the screen), and in the search box that appears, type **EndNote**. EndNote should appear on the list of Programs. Click on it.

2. Once EndNote is open, click **File** and then **New.**

3. Give the file a name and save it to your M:drive (My Documents).

If you want to use EndNote on a personal laptop, you will need to access it through Apps Anywhere (appsanywhere.leeds.ac.uk). Visit the IT Service Desk website to learn more about using Apps Anywhere: https://it.leeds.ac.uk/it?id=kb_article&sysparm_article=KB0014827.

2. Exporting references to your EndNote library

EndNote can receive references directly from a range of search tools, including many databases; this is known as "exporting" references.

Once you have run your search, most databases have a direct export feature that automatically transfers your search results into your EndNote library. Every database is different, but look for links or buttons within the database that say "export", "EndNote", "send to" or "download citations". If you are not sure whether the database allows you to export to EndNote, consult the "how to" information in its help section.

To try this out, you can follow the example below using Web of Science, or select another search tool that you use regularly. There are additional examples for Ovid databases, the Library Search and Google Scholar in the appendices of this guide.

Your subject page also provides information on databases in your subject area: library.leeds.ac.uk/subjects

Exporting references from Web of Science:

1. Go to the Library homepage at library.leeds.ac.uk or access Library Search from the My Leeds tab in Minerva.

2. Type Web of Science into the search box.

3. Web of Science should be at the top of the results list as a "suggested database". Click on the link **Go to Web of Science**.

4. Enter your University username and password if prompted.

5. You are now at the Web of Science homepage.

6. In the search box, type your keywords and click Search.

7. On the results screen, select the records you want by clicking in the box to the left of each reference.

8. Above and below the results, you have the option to "Export". Select EndNote Desktop.

9. A pop-up box will appear. From the options, choose how much of the record you want to export; we recommend you include the abstract. Select Export.

Your records are automatically imported into the EndNote library that you have opened. If you do not have an EndNote library open, you will be prompted to choose one.

In some browsers, your records will be downloaded in a file displayed at the bottom of your screen. Click the file and choose **Open** to import the records to EndNote.

If you are ever prompted for an **import filter**, scroll down the list that you are presented with and select the database you are using, eg Web of Science.

3. Manually adding references to your EndNote library

Not all databases and search tools have the facility to transfer automatically your search results into EndNote. You will need to enter them, and any references you already have, manually.

Guidelines for entering new references:

1. Go to your EndNote library

2. Click **References** and then **New Reference**, or select the new reference icon

3. Select the appropriate Reference Type before entering any details. This will mean that the correct field titles (Author, Journal, Volume, etc.) are available and so ensure that your reference will format correctly

4. You only need to enter information into fields that are essential parts of the reference for your reference list or bibliography

5. Authors can be entered in the format Bloggs, Jo C. or Jo C. Bloggs

6. Organisation names must be followed by a comma (eg **Department of Health,**) otherwise EndNote will assume the last word is an author's surname and your citations will appear as (Health, 2005) instead of (Department of Health, 2005)

7. Where there is more than one author, enter them on separate lines (use the return key on your keyboard after each author name)

8. Red text indicates a name that has not been entered into this EndNote library before

9. Move between fields with the tab key or by clicking on each field

10. Click **Save** to add the reference to your library.

4. Attaching full text articles and other documents to your references

1. In your EndNote library, highlight the reference you want to attach the file to

2. On the summary panel, click **+ Attach file**

3. Find the PDF file that you want to attach and click Open.

You can then select the PDF in the summary panel to open and read it.

You aren't restricted to attaching PDF files; you can also attach Word files, Excel files, etc, and you can attach more than one file to a reference.

Important: By default, EndNote will make a copy of the file and place it in a folder associated with your EndNote library. If you just want to link to the original, make sure you un-tick the box marked "Copy this file to the default file attachment folder and create a relative link".

Please note that:

Un-ticking the box means that EndNote will need to be able to locate the PDF on your computer when you want to access it, eg if you have saved the PDF in your M: Drive on a campus PC, you will need to be using a campus PC or Desktop Anywhere to access it.

Leaving the box ticked means a copy of the PDF will be added into your EndNote library (every EndNote library creates an attached data folder and the PDF is copied into this folder). This uses up computer memory.

5. Importing full text PDFs into your EndNote library

You can import a PDF file or a folder of PDFs directly to your library. EndNote automatically creates the reference for you when you import the PDF(s).

1. In your EndNote library, go to **File** then scroll down to **Import**, selecting **File**

2. Select **Choose**, then find the PDF file you want to import

3. From the **Import Option** drop-down menu select **PDF**, then select **Import**

4. To import a batch of PDFs, go to **File** then **Import**, and select **Folder** instead of **File**

5. If you have sub-folders containing PDF files, ensure you select **include files in subfolders** before clicking **Import**

6. EndNote will extract the basic bibliographic data from most PDFs, in order to automatically create a reference for you when you import the file

7. If you import a PDF and the details of the reference are not imported, you will need to manually edit the reference yourself.

6. Working with PDFs in EndNote

1. Select a reference in your library

2. On the summary panel, click the name of the PDF and then choose **Open**

3. In the PDF viewer you can search the whole document, highlight, strikethrough and underline text, and annotate with sticky notes

4. You can save all your annotations.

Part 2: Inserting in-text citations and creating a bibliography with EndNote

EndNote has a feature called Cite While You Write, which starts creating your bibliography as soon as you insert your first citation into a Word document. Word 2016 has an EndNote tab that allows you to work between your Word document and the references in your EndNote library.

1. Choosing the appropriate referencing style

Before you insert any citations into your document, choose the referencing style that you want to use. If you later decide you need to reference in a different style, just follow these same instructions to reformat your in-text citations and bibliography in another style.

1. In Word, click the **EndNote** tab at the top of the screen to see the EndNote options

2. In the **Bibliography** section at the top of your screen, click the drop-down menu next to **Style:**

3. Click on **Select Another Style** to see all available styles

4. Scroll down to the style you want, eg LeedsUniHarvard

5. Confirm **OK** and now all citations and references will be formatted in that style.
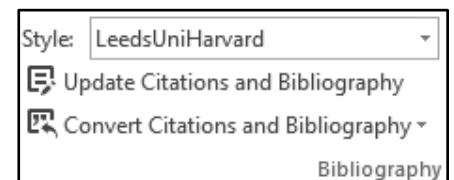
There are three output styles to match the Library referencing guidance for Harvard, Numeric and MHRA (you will find them under LeedsUniHarvard, LeedsUniNumeric and MHRA (Footnote) Leeds Univ). If they don't appear in your list, you can download them here:

library.leeds.ac.uk/info/1403/endnote/44/using_endnote_off-campus/2

2. Inserting in-text citations

1. Open a new document in Word and enter some text. Leave the cursor flashing where you would like the citation to appear.

2. Click the EndNote tab at the top of the screen.

3. Click **Go to EndNote** to switch to the EndNote library you have open.

4. Select the reference you want (hold Ctrl or Cmd while clicking if you want to select more than one reference).

5. Go back to your Word document and click the words "Insert Citation" (not the picture button immediately above it). Then click **Insert Selected Citation(s)** on the drop-down menu that appears.

6. The citations will appear in your Word document where the cursor was flashing, and a corresponding references will be added to the bibliography at the end of the document.

3. Creating a bibliography

Word and EndNote automatically format the references you add, inserting a bibliography at the end of your document.

If new citations added to your text are not automatically appearing in your bibliography, click on the **Instant formatting** drop-down menu and select **Turn instant formatting on**.
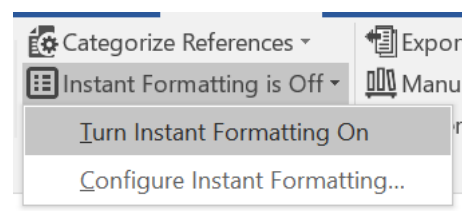
If you want to change the way your references are set out, eg adding spaces between each reference, removing the indent from the second line of each reference, select the **Configure bibliography** button underneath the instant formatting options, then select the **Layout** tab from the pop-up box that appears.

If the references in your bibliography do not look correct, it may be that the information is wrong in your EndNote library. To fix this:

1. Go into your EndNote library and select the relevant reference

2. On the summary panel, click **Edit**

3. Manually edit the reference in your EndNote library and then press **Save**

4. Go back to your Word document, select the **EndNote** tab and select **Update Citations and Bibliography.**

4. Editing citations

In some instances, you may need to include page numbers in your citation (for example if you have used a direct quote), or you might want to exclude the author (for example if the author's name appears naturally in the text - "Smith (2005, p.21) asserts...")

Adding page numbers to your citation:

1. Highlight the citation in your text

2. In the **EndNote** tab in Word, choose **Edit and Manage Citation(s)** from the **Citations** box

3. In the **Suffix** section, enter the page number, eg p.23. (You may need to precede p. with a space and a comma so there is a gap and comma between the year and page numbers: **, p.23**)

4. If you are using the MHRA (footnote) Leeds Univ style, write the page number in the **Pages** section instead. You do not need to add p. or pp.

5. Click **OK**.

Excluding the author from your citation:

1. Highlight the citation in your text

2. In the **EndNote** tab in Word, choose **Edit and Manage citation(s)** from the **Citations** box

3. Next to the word **Formatting**, open the drop-down menu and select **Exclude author** or **Display as Author (Year)** (you can also choose to exclude the year or have the citation appear as a reference in your bibliography only)

4. Click **OK**.

Part 3: Managing your EndNote library

1. Using groups

EndNote allows you to add references to groups. If you are using one library to work on several projects, or on several modules, this can be a very useful tool. References can belong to more than one group.

1. In EndNote, click on **Groups**, then **Create Group**

2. Under **My Groups** in the left-hand panel, you will see an entry called **New Group**. You can overwrite this with your own group name. You can rename a group by right clicking on the group name and selecting **Rename group** from the menu.

3. To add references to your new group, select the references you wish to add by highlighting them (hold down the Ctrl or Cmd key as you click to select multiple references). Right click on the reference(s), choose **Add references to** and select the appropriate group from the list. Alternatively, click on **Groups** in the toolbar, then **Add references to** and select the appropriate group from the list.

4. You can also drag and drop references into groups by selecting them and dragging them with the cursor across the screen into a group.

5. To remove references from a group, open the group by clicking on it. Select the references you wish to remove and go to **Groups** and then choose **Remove References from Group**. The references will be removed from the group but will remain in the **All References** part of your EndNote library.

2. Checking for duplicates

If you import references from more than one set of results (eg from two different databases or from two searches on the same database), you will probably end up with several duplicate references in your library. Duplicates can cause problems when working with Word, as you can inadvertently end up with duplicate citations and multiple entries in your bibliography. EndNote can help to remove them.

To identify duplicate items:

1. Click on **Library** on the top toolbar, then click **Find Duplicates**.
2. A new window will show you the duplicates that have been found and invite you to select which one to keep. It shows you the details of two matching items, with any differences highlighted in blue.
3. To select the item to keep, click **Keep This Record**. The other reference will be moved to the Trash. If you want to keep both, click **Skip**.

EndNote looks within the library for references of the same type with matching author, year and title fields. It is possible that one of the duplicates will contain more detail than another, so you may have a preference as to which reference to keep.

You can find a greater number of duplicates by trying different combinations of duplicate preferences:

1. Go to **Edit**, click **Preferences** and then **Duplicates**
2. Select or unselect fields to change the criteria, then click **OK**
3. Click **Library** and **Find Duplicates** again to find references that match your new criteria.
4. For a thorough de-duplication check, we recommend you select each of the following different combinations before running Find Duplicates again:
    a. Year, Author, Pages
    b. Year, Journal, Title
    c. Author, Journal, Title
    d. Year, Title

The Find Duplicates tool might not identify every duplicate record due to differences in the punctuation and spelling of journal names, article titles, and author information. To catch them all, you should also always manually check for duplicates.

To manually check for duplicates:

1. Sort the references in your library by clicking on the Author or Title column headings. This should help you to find any remaining duplicates by reading down the list.
2. Delete a duplicate reference by right-clicking on it and selecting Move References to Trash. You can also press Ctrl+D on your computer keyboard.

3. Syncing with EndNote Online

If you want to use your EndNote library when you are away from a University computer, you can create an EndNote Online account to synchronise between different devices or to access your library from a browser.

You might choose to use EndNote Online as the only way of managing your references (on and off campus), but please note that it has fewer features than the EndNote desktop version introduced in this guide.

Our EndNote Online Guide library.leeds.ac.uk/info/1403/endnote/45/endnote_online_guide will help you to set up an account and to learn how to use EndNote Online.

If you have an EndNote desktop library, it is important to ensure that the references in your desktop library are synchronised with your online library, so that the same information is available in both. Please note that you can only sync one EndNote Online library with one desktop library per computer. Syncing will make the references in both libraries identical.

To ensure that your desktop library syncs with the correct EndNote Online account, you will need to connect the two by setting your preferences in the desktop version:

- Go to Edit, then Preferences
- Choose Sync from the left-hand menu, and fill in the EndNote Account Credentials (your EndNote Online email address and password)
- At the bottom of the EndNote Preferences Sync window, you will also find an option to tell EndNote to sync the libraries automatically, ie each time a reference is added to the desktop version.
- You can choose to sync the libraries at any time by going to the **Library** menu in the EndNote desktop version, then selecting **Sync**

Further help

For comprehensive guidance on all aspects of using EndNote, please see our EndNote support pages: library.leeds.ac.uk/info/1403/endnote/43/endnote_support

Appendices

1. Exporting from Ovid databases

These instructions are for Medline but the same principles apply to all other Ovid databases, including PsycINFO and Embase.

1. Go to the Library homepage at library.leeds.ac.uk or to the 'Learn' tab in Minerva

2. Type **Medline** into the search box

3. Medline should be at the top of the results list as a 'suggested database'. Click on the link **Go to Medline**.

4. Enter your University username and password if prompted

5. In the alphabetical list, find and click on the link to the most recent section of the database: **Ovid MEDLINE(R) (ALL)**

6. You should now be on Medline's advanced search screen

7. In the search box, type your word or phrase and click **Search**

8. Choose which results you want to keep – you can tick individual results or tick the box at the top of the list to select All

9. Click on the **Export** option on the bar above your main list of results. This should open a window. Click on the **Format** drop-down menu and choose **RIS** (not EndNote)

10. Under **Fields**, choose how much of each reference you want to keep. For this exercise, the second option **Citation, Abstract** will be sufficient

11. Then click **Export** to download the references**.** If you are prompted to Save or Open the downloaded file, choose Open to add the references to your Endnote library.

If you are using Chrome as your browser, then your records will be downloaded in a file displayed at the bottom of the screen. Click the file to import the records to EndNote.

Your records are automatically imported into the EndNote library that you have opened. If you do not have an EndNote library open, you will be prompted to choose one.

2. Exporting from Library Search

1. Go to the Library homepage at library.leeds.ac.uk or to the "Learn" tab in Minerva
2. Carry out your search using the search box
3. From your search results, mark the items you wish to keep by clicking on the pin icon next to each item. This will add them to your **my favourites section**, which can be accessed at the top right of the screen
4. In **my favourites**, select all the items you wish to export by clicking on the number next to each one.
5. Now click on the ellipses (**...**) near the top of the screen
6. From the export options select **Export RIS (EndNote)** and then **Download**

7. If you are presented with a window asking if you want to "Save" the file, choose to save it. From the following window, choose to "Open" it.

8. If you do not have an EndNote library open, you will be prompted to choose one.

3. Exporting from Google Scholar

Note that you can only export references one at a time, so this option is not suitable for supporting comprehensive literature searching.

You will need to update your preferences inside Google Scholar before you can send any references to EndNote. Follow these steps to configure Google Scholar to send references to EndNote.

1. Go to the Google Scholar homepage at scholar.google.co.uk

2. Click on the 3 horizontal lines at the top left of the screen

3. Click on the "Settings" link

4. Under "Bibliography Manager", select the option "Show links to import citations into" and choose "EndNote" from the menu

5. Click on the "Save" button

Follow these steps to import search results into EndNote.

1. After performing a search on Google Scholar, click on the "Import into EndNote" link under the reference you want to import.

2. If you are presented with a window asking if you want to "Open" or "Save" the file, choose to open the file.