EndNote Introduction for Referencing and Citing

EndNote X7

Additional information for University of Nottingham users

Libraries, Research and Learning Resources

July 2015

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Section 1: Introducing EndNote

What is EndNote?

EndNote is a reference management software package, which is used to manage bibliographies and references when writing theses, essays and articles. The software is available for both PC and Mac.

EndNote allows you to:

- Store all the references that you find during your research. They can be entered manually or downloaded from most databases.

- Store PDF files, pictures, graphs, tables, etc.

- Add citations to your work and create bibliographies in any output style (e.g. APA, Harvard, MLA, and Vancouver). There are approx. 6,400 styles to choose from.

EndNote documentation

Thomson Reuters, the publishers of EndNote, produce both *Quick Reference Guides* for EndNote (separate guides for Windows / Mac / EndNote Online) and a full *EndNote X7 User Guide*. These can be downloaded from http://endnote.com/training#resources

If you would prefer to watch a demonstration of EndNote, the publishers offer links to their key training videos at: http://endnote.com/training#video

In addition, you can download the videos to watch them without requiring an Internet connection: http://endnote.com/training/videos

EndNote training videos are also searchable on YouTube. You might like to start by looking at EndNote in 7 minutes: https://www.youtube.com/user/EndNoteTraining

Use of EndNote on campus

The University of Nottingham (UoN) has a site licence for EndNote which allows staff and students of the University free use of the software under the terms of the licence. The software can only be used on campus or on University owned laptops.

Please ask your School IT contact if you would like to have the software installed on a university owned computer in your department.

Use of EndNote off campus

Client/Desktop version

Staff and research students with a UoN PC should contact their local IT Support.

EndNote may be purchased for use on personally-owned PCs and Macs at an academic discount. You can install your purchased software on up to 3 computers of either type.

For further information please search for EndNote on the Software Library
http://softwarelibrary.nottingham.ac.uk/

EndNote Online

EndNote Online, formerly EndNote Web, is the online counterpart to the desktop software. UoN staff and students can set up an EndNote Online account which will allow you to synchronise your references between the desktop, online (and iPad) so that you can access your references from anywhere (see section 11).

Versions

Update: June 2015

The University currently supports version X7. This version is available across the network. You may have an older version of the software on your office or home computer. Wherever possible, we recommend you work with the same version. However, you should be able open your EndNote libraries in earlier versions and vice versa.


Section 2: Opening EndNote and Creating a Library

The first time you open EndNote, the Welcome Screen offers you more information about some EndNote features which allow you to find, store and share your research and references.
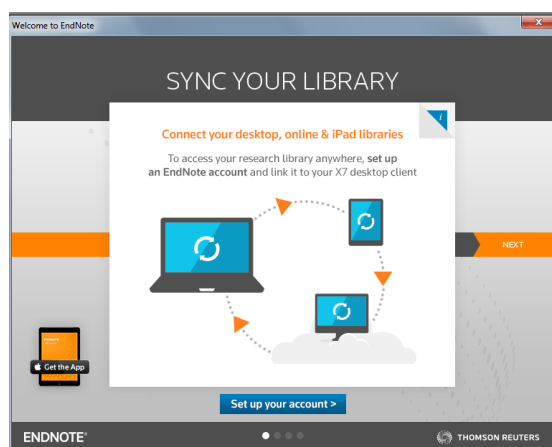
You can set these features up at any time. If you don't want to explore these options now, simply close this Welcome window. You can return to it by selecting Help on the menu bar.
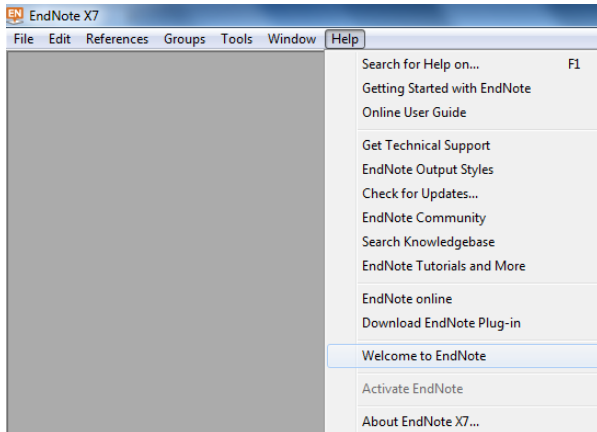
Note that you can access a huge amount of help and support from this menu, such as the **Online User Guide**.

For **context sensitive help** when you are using EndNote, press the **F1** key on your keyboard.
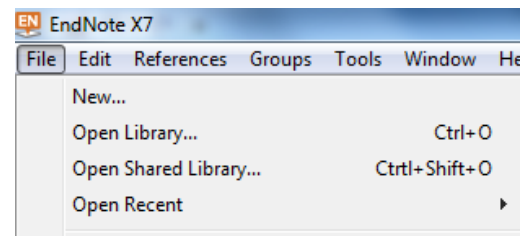
EndNote Libraries

EndNote references are stored in a database called a Library. EndNote libraries have the file extension **.enl**. Each library has a corresponding folder with the extension **.Data**. This folder will have the same name as the library, and it is where images, PDF files, etc. are stored. If you move, copy, rename or delete a Library remember to do the same with its corresponding .Data folder. The file and data folder must always stay together to ensure that the program works correctly.

Create a library

Go to **File** then **New** to make a new library.

You will be asked to save the library to a suitable location, for example to your personal file store on the Z drive or to a memory stick.

Although the software allows you to create as many Libraries as you wish, it is strongly recommended that you **only create one library in EndNote.**

Tip: Saving your library
Don't save your library in a cloud syncing folder such as DropBox or OneDrive. Thompson Reuters, the publishers of the EndNote software, advise that cloud syncing folders will corrupt your EndNote library over time.
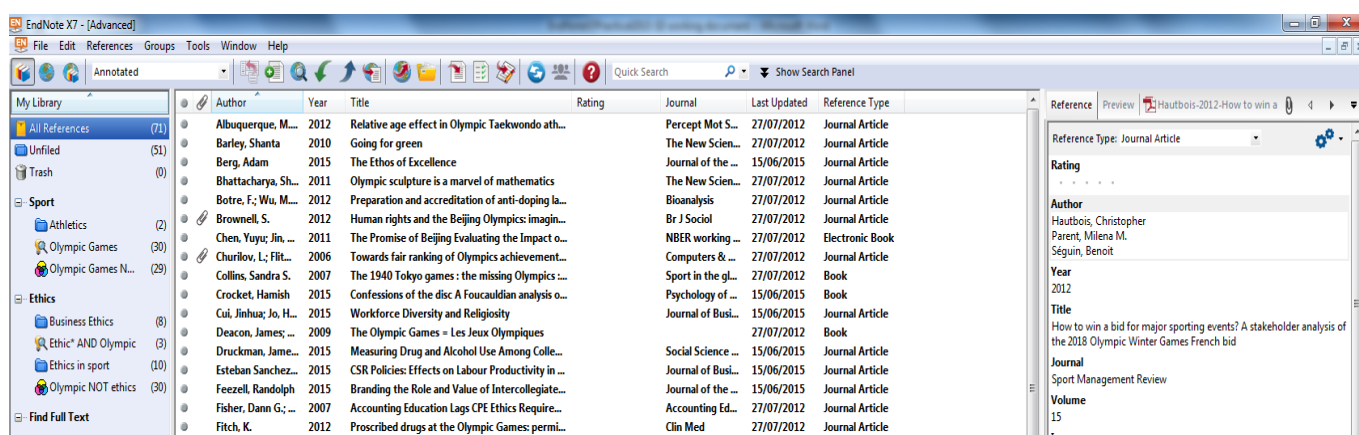
Backups

It is always a good idea to create a backup of your library in case your original gets corrupted.

- Click on **File > Save a Copy**

Make sure you update your backup if you change anything in your original.

Understanding the Layout

The EndNote Library screen is split into three panels:
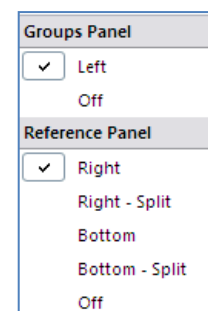

From left to right, these are:

Groups panel: Subsets (or folders) of references, online search, find full-text options

Reference List panel: Your master list of references

Tab panel: Quick edit, allowing you to quickly edit an existing reference, preview the reference in a selected referencing style or view a PDF

You can change the size of any of the windows by dragging the panels.

You can change the layout by clicking on the **Layout** drop-down menu in the bottom right corner of the page.

Understanding the Toolbar

The icons along the top of the toolbar allow you to perform basic functions. You can also access these functions from the drop-down menus at the top of the screen.

From left to right, the icons are:

- Output Style
- Copy to Local Library (Online Search Mode only)
- New Reference
- Online Search
- Import references
- Export
- Find Full Text
- Open Link

- Open File
- Insert Citation
- Format Bibliography
- Return to Word Processor
- Synchronise with EndNote Online
- Share Library
- Help
- Quick Search Text Box
- Show Library Search panel

This guide will cover most of these options. To find out more about what each command means, go to EndNote Help.

Section 3: Adding References

There are three ways of adding references to your library:

- Type in references manually
- Import bibliographic details from a PDF
- Import references automatically from an online database

Create a New Reference Manually
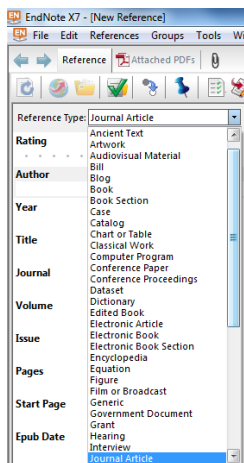
- Choose **New Reference** from the **References** menu or click on the symbol.

- An empty window opens with the words **New Reference** displayed at the top.

- New references always appear as journal articles but you can select the correct **Reference Type** for the publication you wish to cite using the drop down menu.

- Enter the information in the relevant fields: author, year, title etc.
- Enter all the author names for a particular reference. EndNote will truncate the list of authors with 'et al.' as required by the chosen citation style.

Tip: Entering author names

Enter author names as follows:

Surname, initials or full name (remember to put a comma after the surname and separate initials with full-stops),
E.g. **Smith, J. E.** or **Smith, John**

If you have more than one author, make sure that each author is entered on a separate line.

If you have a corporate author or body, enter a comma after the name to ensure that it is correctly formatted by EndNote
E.g. **Department of Health,**

If the the corporate name includes a comma in the name itself, use two commas
E.g. **School of English,, University of Nottingham**

- Move between fields by pressing the **tab** key.
- Except for authors, no extra punctuation needs to be entered into the reference. EndNote adds the necessary punctuation to the references when it creates a bibliography.
- You don't have to complete all the fields. Some are provided for your own use to help you organise your research by adding notes or attaching files.
- When you have finished entering all the information, close the reference window by clicking on the small **cross** to save the reference.

Tip: Knowing when a reference was added
To see when a reference was added or updated view the **last updated** column or open the reference by double-clicking on it to see the last update displayed in the footer.
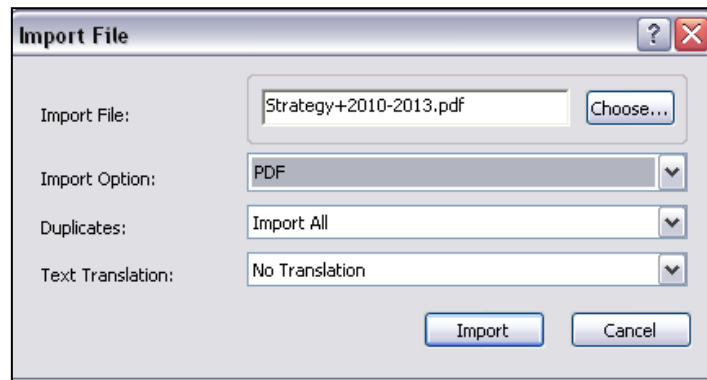

Section 4: Importing references from PDFs

EndNote allows you to convert a collection of PDF files into EndNote records.

- Click on **File**
- Click on **Import > File**

- Find your PDF file

- Choose **PDF** from the drop-down menu

The bibliographic details will automatically be populated in EndNote. The PDF file will also be attached to the reference, as shown by the paperclip icon.

If you have multiple PDFs in a folder, follow the same instructions as above but from the **File** menu, choose **Import > Folder**

Tick the **checkbox** if you want all **files in subfolders** importing also.

> **Tip: Will it work for all PDFs?**
> EndNote looks for the Digital Object Identifier (DOI) within a PDF to match it with data from the CrossRef service and then capture the bibliographic details . If a DOI is not available, EndNote will not be able to gather this information.

PDF automatic renaming

Many downloaded PDFs have names that do not allow you to recognise the contents of the PDF from the name alone. You can set EndNote to rename your PDF files when they are imported, so that they have uniform and meaningful file names.

Go to the **Edit** menu and select **Preferences.** Click **PDF Handling**, then select the option you want for your filenames based on the contents of the PDF. Click the **OK** button.
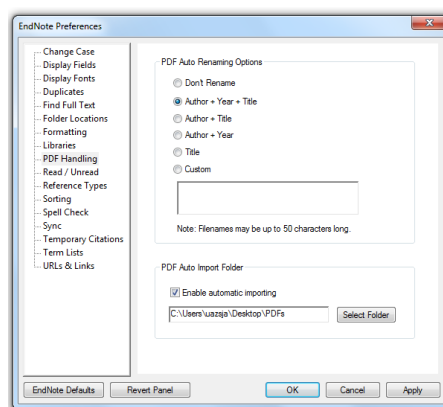
Automatic import of PDFs

Also in **PDF Handling**, you can set up a **PDF Auto Import Folder**. Tick the **Enable automatic importing** box. When you are searching for articles, save the PDF files into the specified folder. EndNote will regularly scan this folder and automatically import new PDFs that are found in it.

After EndNote runs the import operation, EndNote moves the PDFs into a subfolder called Import within your Auto Import Folder. This helps you (and EndNote) keep track of what has already been imported into your library.

Section 5: Importing references from databases

You can use EndNote to save references from bibliographic databases or library catalogues by importing them electronically into your EndNote library. Different databases will use different methods.

There are two methods:

- **Direct import** facility
- **Saving a file** of references which are then imported using an appropriate **filter**.

For EndNote to understand the reference, the information must be in a **tagged** format.

- If your database has a direct import facility, these tags will automatically be provided.
- If your database requires you to firstly save the references as a file, you will need to save as a text or RIS file which will automatically provide the relevant tags.

Word documents do not have these tags and therefore you cannot transfer references directly from Word to EndNote. Try finding the references again using a database and importing them directly from there.

Note: We do not recommend using the online search option to search bibliographic databases from within EndNote. This is because you would lose the functionality of the database searching system and your search is likely to be less effective.

5a: Direct Export

Importing references from Web of Science

The Web of Science is a multidisciplinary database covering journals and conferences relevant to the sciences, arts, and social sciences. It is used to demonstrate the direct import method to copy references from the database straight into EndNote.

Accessing the Web of Science

- Access the Web of Science via **NUsearch**, available from the library homepage (http://www.nottingham.ac.uk/library/).
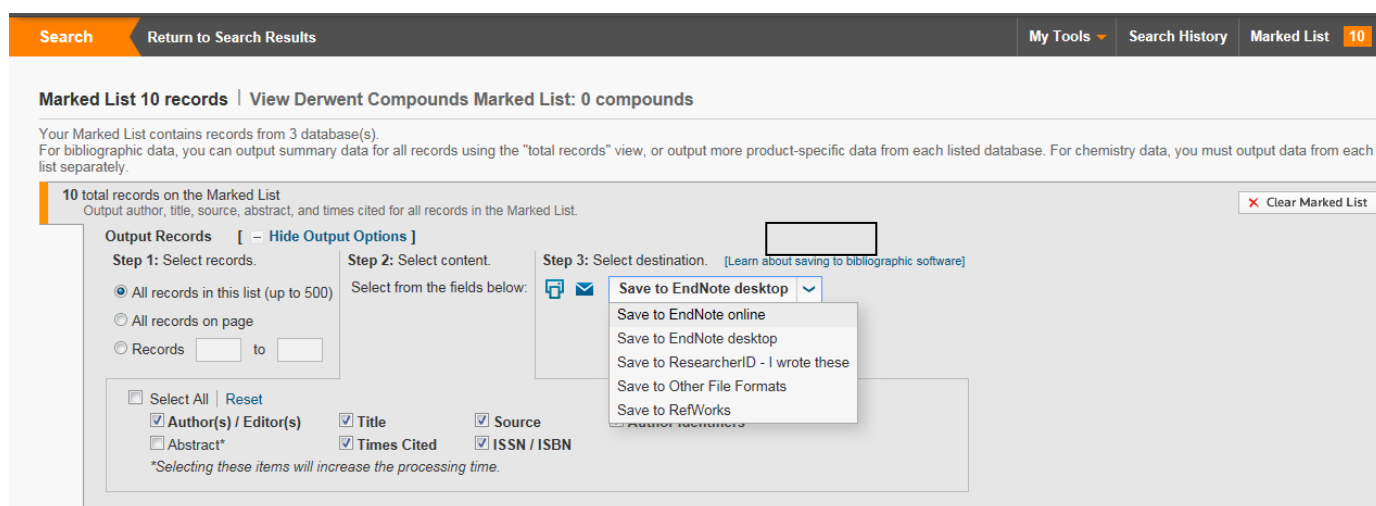
Importing references to EndNote

- Conduct a search and mark some relevant references by ticking the **check boxes**

- Click on the **Add to Marked List** button.

- The added references will display a ✅

- Click on the **Marked List** button at the very top of the screen to view the selected references

> **Tip: Further help**
> For more information on searching databases, see the Studying Effectively website at:
> http://www.nottingham.ac.uk/studyingeffectively

- Select any extra details as required, e.g. abstract, times cited.

- Select **Save to EndNote Desktop** from the drop-down menu on the right-hand side.

The references will automatically download into the EndNote library that you currently have open. If you don't already have EndNote open, you will be asked to select the library into which you wish to import your references.

Note: When importing references, both the database that you're importing from and your chosen web browser will affect the process. If you are using **Chrome**, the file may download to the bottom left hand corner of your screen. Click the small arrow to Open the file in the EndNote program.
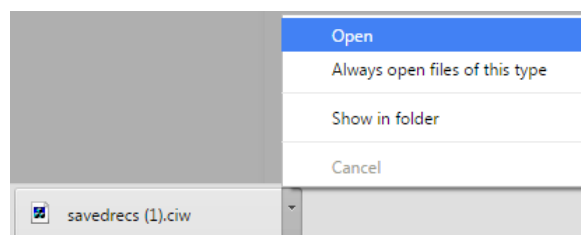
When the import is complete, only newly imported references will show in the Library window. They are put into a temporary group called **Imported References** where they can be checked. The original references plus the new ones can be viewed under **All References.**

5b: Non-direct export

Importing from the Library Online Catalogue

Some databases do not have a direct export option. The Library Online Catalogue (UNLOC) is an example.

This method involves two steps:

1) Saving references as a **text file**

2) Importing the file into EndNote using a **filter**.

Access UNLOC at: http://www.nottingham.ac.uk/unloc or click on the **Library Catalogue** link from the **library homepage** (http://www.nottingham.ac.uk/library/).

Step1: Saving references as a text file

- Perform a search and **Mark** some relevant references.
- Click on the **Save/Mail Selected** option towards the top of the screen.

We are going to **Save a set of records to disk**.

- From the drop-down menu, select **Reference management format**. This will format the references to enable EndNote to import the appropriate details.
- Click on the **Save** button.

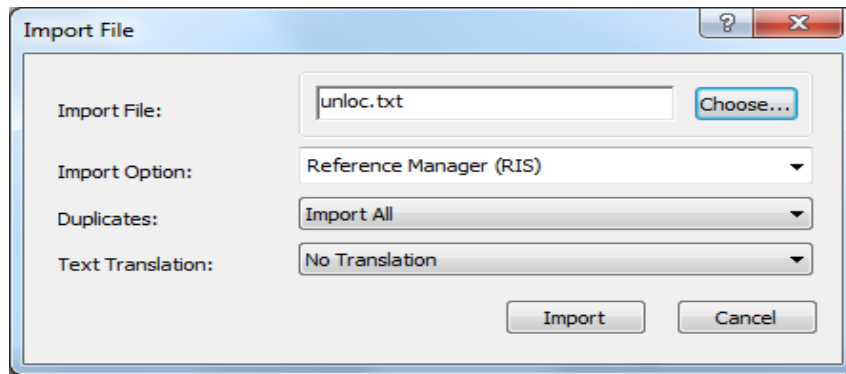Your references are now displayed in a tagged format for EndNote.
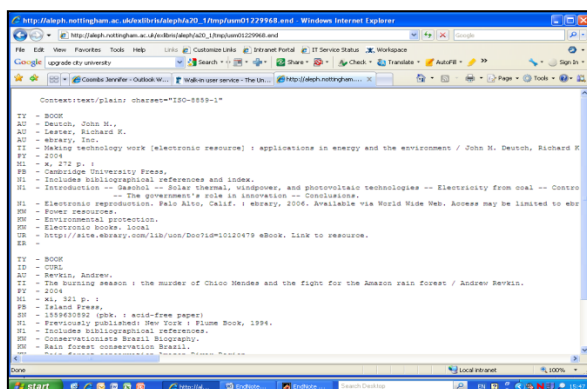
- If you are using Internet Explorer, in **Tools**, click **File > save as...**
- If you are using Chrome, under **Customize and control Google Chrome**, select **Save page as...**
- Choose a **location** to save your file to, e.g. your Z drive

- Give your file a **File name**
- From the **Save as type** drop-down menu, select **text file (*.txt)**
- Click on **Save.**

Step 2: Importing the Saved References into EndNote

- Open your library in EndNote.

- From the **File** menu, choose **Import > File** or click on the ![icon] icon and the following window will appear:

Import File			?	✕
Import File:	unloc.txt			Choose...
Import Option:	Reference Manager (RIS)			▼
Duplicates:	Import All			▼
Text Translation:	No Translation			▼
			Import	Cancel

1. Click:
   - **Choose…** to locate and open the text file of references you have just saved
   - Select the file and click **Open**
2. EndNote now needs to know which format the references from the database are in:
   - Click on the drop-down menu beside the **Import Option.**
   - Choose **Reference Manager (RIS)**. This is the correct format for references from UNLOC.
3. Now select an option from the **Duplicates** drop down list. (A reference is considered a duplicate if the author, year, title, and reference type match a reference already in the library.) The options are:
   - Import all
   - Discard duplicates
   - Import into duplicates library
4. Click **Import** to import the file.

When the import is complete, only newly imported references are showing in the library window. They are put into a group called **Imported References** where they

can be checked. The original references plus the new ones can be viewed under **All References.**

Double-click or **preview** the reference to see if it has imported correctly. Please note that sometimes these import options are not 100% effective and therefore some information may be missing. Sometimes this information may have been put into the **notes** field, which allows you then to simply copy and paste it into the correct field in the reference.

5c: Importing from NUsearch

- Sign in to NUsearch

- Conduct a search

- To export all the results currently displayed on the screen, select **add page to e-Shelf** (under **Refine**, to the left of the screen)

- To add an individual reference as you browse your search results, under Details select **Send** to then **Add to e-Shelf**
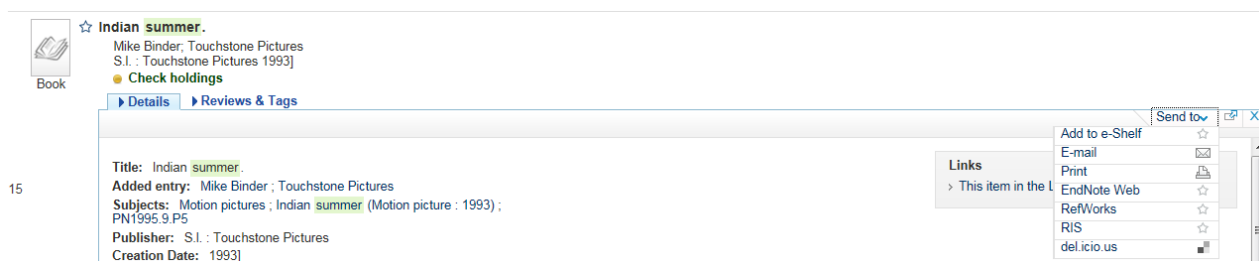
- Click on **e-Shelf** (top left of screen)
- From your basket, select the references for export
  - o You can also delete references from list by selecting ones for deleting and then clicking X
  - o You can then select all in a list by ticking top tick box and export all with one click
- Choose **Export to RIS** and click Go
- Click OK on the **Import to Citation Manager** window
  - ▪ If offered 'Open select this
  - ▪ If offered 'View downloads' select this and then click Open

5d: Importing from some other commonly-used databases

As well as UNLOC, a few other databases do not have a direct export option. You should follow similar steps to those described above to save as a file and import. When importing into EndNote you will need to choose the appropriate **filter**. A filter is usually the name of the database and the supplier. Note that some databases are offered by more than one supplier and so you will need to select the appropriate **supplier.**
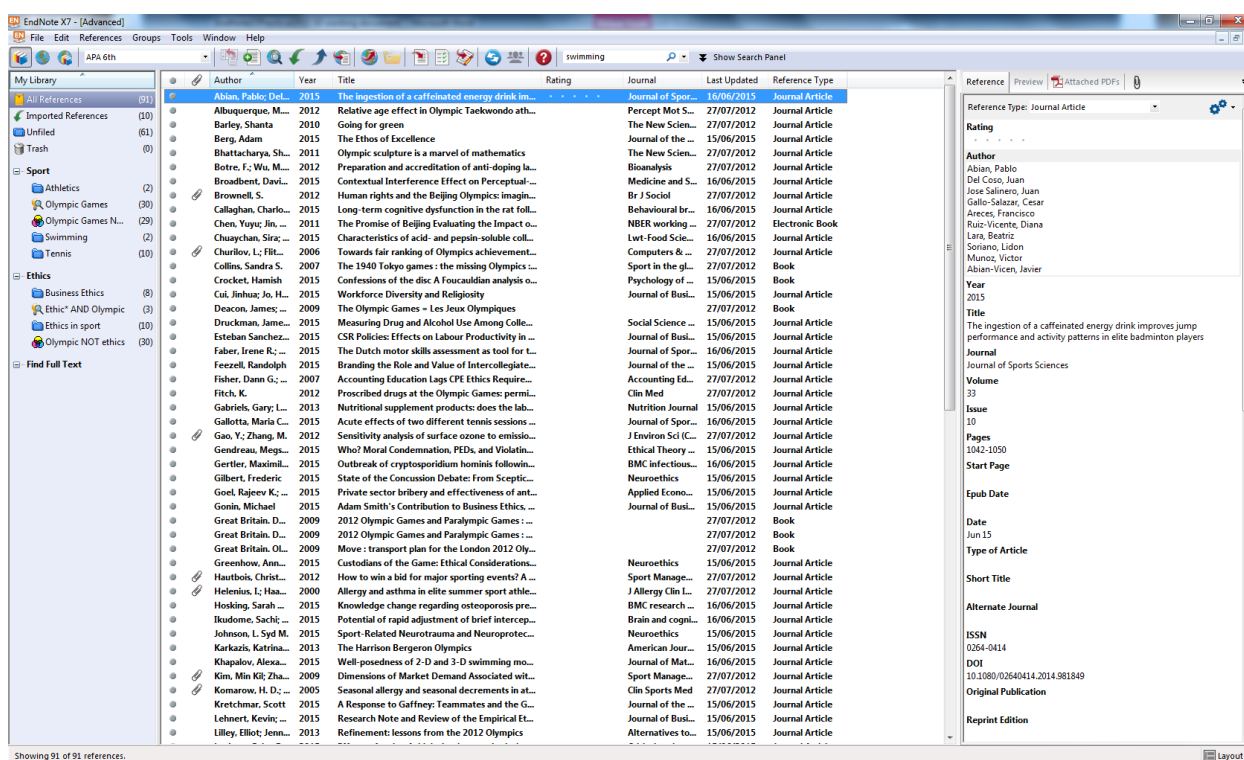
If you can't see the filter you want, click on the option **other filters**.

See the **Appendix** for guidance on how to download from some of the commonly used databases.

Section 6: Managing references

Displaying references

When you open an EndNote Library, the **Reference List Panel** displays all of the references it contains:


You can change the order of the fields displayed by clicking on the column heading and dragging it to the desired location. You can also do this from the **Edit** menu, choose **Preferences** and **Display Fields**.

Use the buttons to the left of the author to mark references as **Read** or **Unread.**
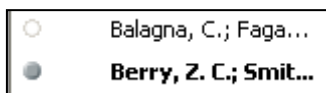
To see the full reference in the referencing style selected, highlight the reference and select the **Preview Tab** in the **Tab Panel.** To view in a different referencing style, choose from the **Output Style** drop-down menu.
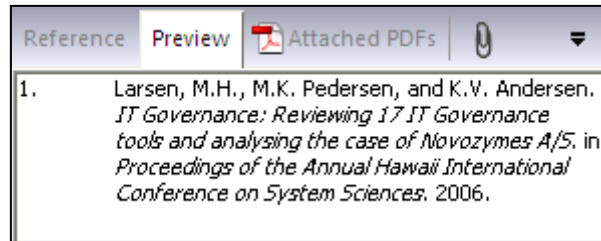
You can browse through your reference library by using the scroll bar, the scroll arrows, or the page down, page up, home, end, and arrow keys.

Editing a Reference

To work with a specific reference you must first select it in the **Reference List Panel**.

The **Reference Panel**, which by default appears in the Tab Panel on the right-hand side of the page, allows you to edit your reference. Click somewhere else on the page and you can choose to **save changes**.

Alternatively, **double-click** on a reference in the **Reference List Panel** to edit a reference. EndNote will prompt you to save the changes when the reference window is closed.

Use the **Options** button to **hide empty fields** in the record, or display the **Ratings** tool.
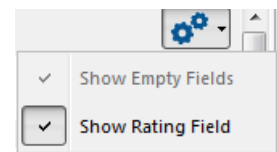
Search for a Set of References

- Click on the **Tools** menu and select **Search Library** to open up the search box.

Or

- Click the **Show Search Panel** in the top right-hand side of the screen.

The search panel will appear at the top of the screen. You may need to resize your screen to view all of the panel.

- Type in your **Search Term** in the first box and select the **Field** in which you wish to search. Click on the **Search** button

You can combine searches together using the Boolean operators **AND/OR/NOT**

To find references for a particular year range:

- Type in the **start year** in a search box

- Choose **Year** from the drop down field list

- Select the appropriate option in the **Contains** drop-down menu.

For example, to search for references from 2000 onwards:

- Choose the **Year** field

- Select **Is greater than or equal to** from the **Contains** drop-down menu
- Enter **2000** in the search box

The search example below is for references containing the word extinction, published since 1990:

In order to combine more than three searches, extra lines can be added by using the **+** button.

You can also choose to search by **Added to Library** or **Last Updated** and enter a date.

To remove the search panel, click on **Hide Search Panel** in the top right-hand corner of the screen.

To carry out a quick search, use the **Quick Search** box at the top of the page and type in your search term.

Sorting References

By default, the references are sorted alphabetically by first author. You can change the order of the displayed fields by clicking on the column headings, e.g. A-Z by author surname, year. You can also do this from the **Tools** menu:

- Choose **Sort Library**
- Use the **drop-down menus** to choose the required **field(s)**
- Click on the button to the right of the field to specify **ascending** or **descending** order
- Click on **OK**.

Section 7: Linking to and Viewing the Full-text

EndNote provides several ways of linking to the full-text of an article:

Automatic linking

For databases such as Web of Science or PubMed, an html link to the record will automatically be populated into the **URL** field. If the University subscribes to the full-

text of the article, you can click on the link and browse to the full-text. You can also click the ![icon] icon.

Alternatively, highlight a reference in your library:

- Click on **References** from the top menu
- Click on the **URL** option
- Click on **Open URL**.

Please note that not all journals in these databases will be subscribed to by the University.

Typing in the URL

You could also manually add the web address for the full-text of an article in the URL field of the reference. For journals it is recommended that you use the **DOI (Digital Object Identifier)** code to create the URL adding http://dx.doi.org/ before the DOI number, e.g. http://dx.doi.org/10.1016/S0040-4039(97)82966-8 and enter this into the DOI field.

DOI numbers are often shown on the website or PDF of journal articles and usually import into the DOI field in EndNote from a database.

Attaching files manually

To attach a PDF file to a particular reference:

Either:

- **Highlight** a reference and **right-click** your mouse. Choose **File Attachments** and choose **Attach File**.
- **Browse** for the document.
- Click **open.**

Or:

- Drag and drop the PDF file into the relevant reference.

Automatically finding the full-text

If the University subscribes to the full-text of an article, you can ask EndNote to find it and automatically attach it to your reference.

To do this you must enter details of the **OpenURL resolver** used by the University in the **Preferences** area:

- Click on **Edit**
- Click on **Preferences**
- Click on **Find Full Text**

- In the Open URL Path enter: http://sfx.nottingham.ac.uk:80/sfx_local
- Click on **OK.**

To automatically attach PDFs:

- **Highlight** the reference(s)

Either

- Click on the **References** option in the top menu
- Choose **Find Full Text,** and across to **Find Full Text** again.

Or

- Click on the find full-text icon [icon] in the top menu bar

You will need to accept the copyright statement. EndNote will then search for the full-text (this can take several minutes).

The results of the search will be shown in the menu panel on the left-hand side under the heading **Find Full Text**.
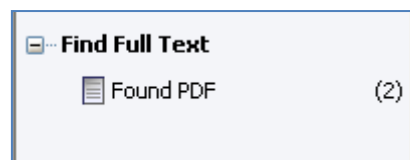
Watch out: Not 100% fool-proof

There are many reasons why the full-text may not be found even when we do have a subscription. For example, many publishers will automatically block bulk downloading of PDFs. In these cases, you could attach the file manually.

To check whether we do subscribe to the full-text, click on the **References** option from the top menu bar and click on the **URL** option and then **OpenURL link**. This will take you to the SFX window and clarify whether the full-text is available or not.

Viewing PDFs

- **Select** the reference and in the Tab Panel on the right-hand side, you should see the **PDF icon**.

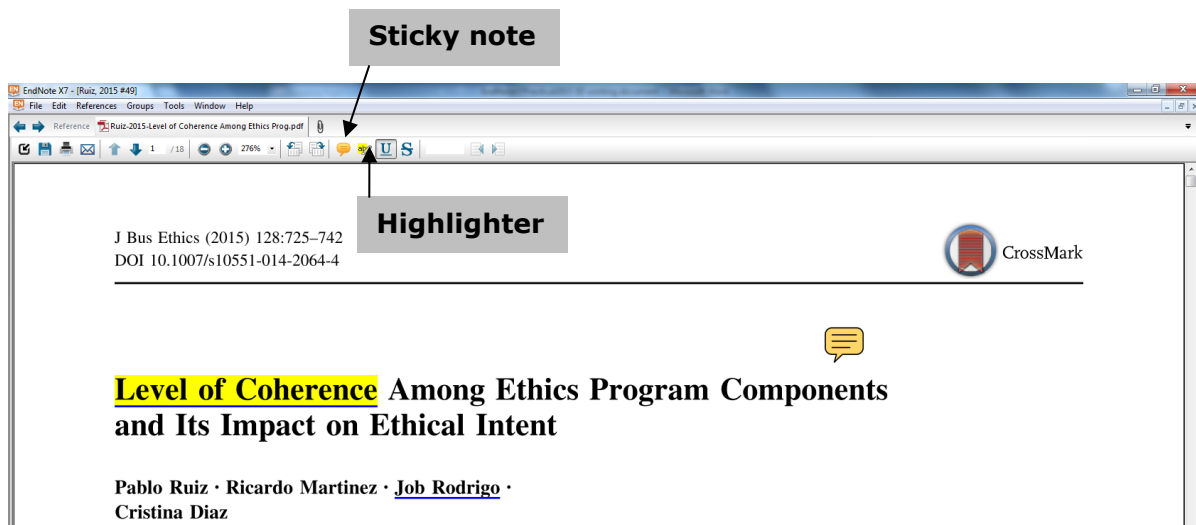- Click on the **PDF icon** to view the PDF within EndNote.

The **Layout** button in the bottom right-hand corner allows you to change the display of the PDF to suit your computer's dimensions. You can resize any of the frames to make the area larger.

To make the PDF full-screen click on the [icon] button.

The buttons along the top of the screen allow you to:

- **Zoom** to enlarge/decrease the text size
- **Highlight** areas of the text
- Add **Sticky Notes** containing your own comments
- **Underline** or **Strikeout** selected text
- **Search** for terms within the PDF.

If you would prefer to view the PDF in an external package, e.g. Adobe Acrobat, click on the **yellow folder icon** [icon] at the very top of the page.

Section 8: Creating Groups

It is recommended that you only create one library in EndNote. You can use groups to organise your references into subsets.
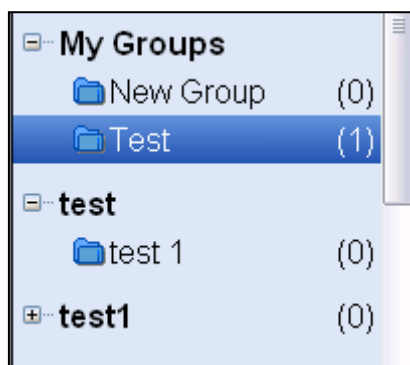
My groups

Groups can be created to collate together references on a particular topic.

- Click on the **Groups** option on the menu bar
- Select **Create Group**
- Enter a **name** for your group
- You can then start to file your references. Either, **drag and drop** references from the Reference List Panel into any of your groups. Or right-click on the reference and click on **Add References To** and select the group.

These grouped references are a copy and so all references also remain in the main library.

If you have a lot of groups you can also create **Group Sets** to organise your groups in a more manageable way.

- Click on the **Groups** option
- Select **Create Group Set**
- Enter a **name** for your group set.
- Drag and drop any of your individual groups into the group set.

> **Tip:** You can also create **Smart Groups** built with search strategies. Any new references added to your library which match the search criteria for your Smart Group will automatically be filed in the group.

Section 9: Select Other Bibliographic Styles

Bibliographic styles are files that are used to control the appearance of references in a bibliography. A set of standard styles is already installed in the EndNote software.

Previewing the reference

- Select a reference
- Click on the **Preview** tab in the right-hand panel
- This will show you how the reference will look in your document using the selected output style.

To change the style:

- Click on the **Bibliographic Output Style** drop-down menu at the top of the page

You will see 3 default styles:

- Annotated (includes everything, including the abstract)
- Author-Date (Harvard style)
- Numbered

You may also see any styles that you have recently used. Select the **style** you want, or click on **Select Another Style** to view more styles.

Selecting favourite styles

To view the styles available:

- Click on **Edit**
- Select **Output Styles**
- Select **Open Style Manager**.

After a short delay a list of journals for which output styles are available is displayed:
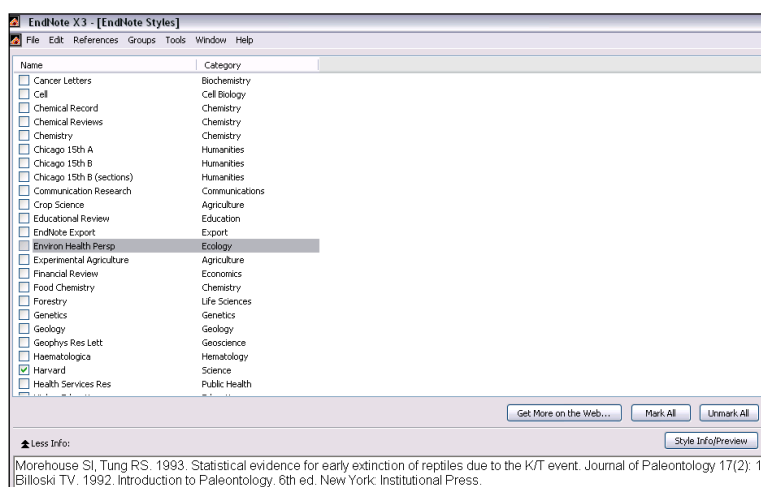
- Click on the **Column** headings to sort by **Name** or **Category**

The lower window in the style manager shows more details of the styles (click **More Info** if this is not showing).

The **Style Info/Preview** will show you exactly how the reference will be displayed for this style.

- Check the **boxes** to the left of the names to select styles for a list of **favourites** and close the window.

If you wish to view more than the default styles:

- Click on the **Get More on the Web** button
- Find the style you want
- Click on **Download**
- **Save** the file.

If you are using a locally installed version of EndNote on your own PC, you should download the file into the **styles folder** found within the EndNote folder where the program has been locally installed. Typically, this is on the C drive in the programs folder.

If you wish to save an output style to use on a networked PC, you should save the file to **my documents**. Note that this will only remain for the duration of your logged on session.

Modifying output styles

EndNote has a wide range of output styles to suit different referencing styles and journal requirements, but occasionally you may not find one to suit your particular needs so it is possible to edit a style:

- Click on **Edit** from the top menu
- Click on **Output Styles**
- Select the style that most fits your requirements
- Once selected, click on **Edit** for a second time, click on **Output Styles** and you should see the option to **Edit** your chosen style.
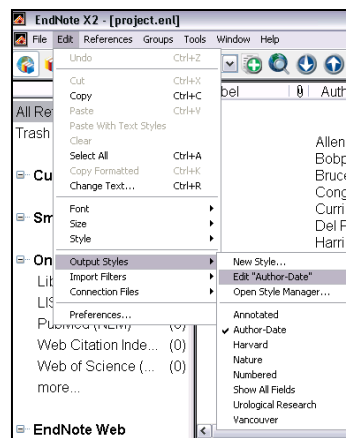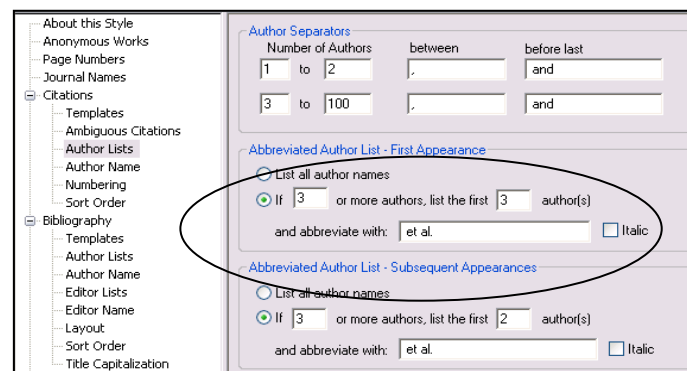

Some examples are given below:

An in-text citations example

If you have a reference with three or more authors, you may wish to list three of them before *et. al.* rather than the default two authors:

- Click on **author lists** within the **citations** option
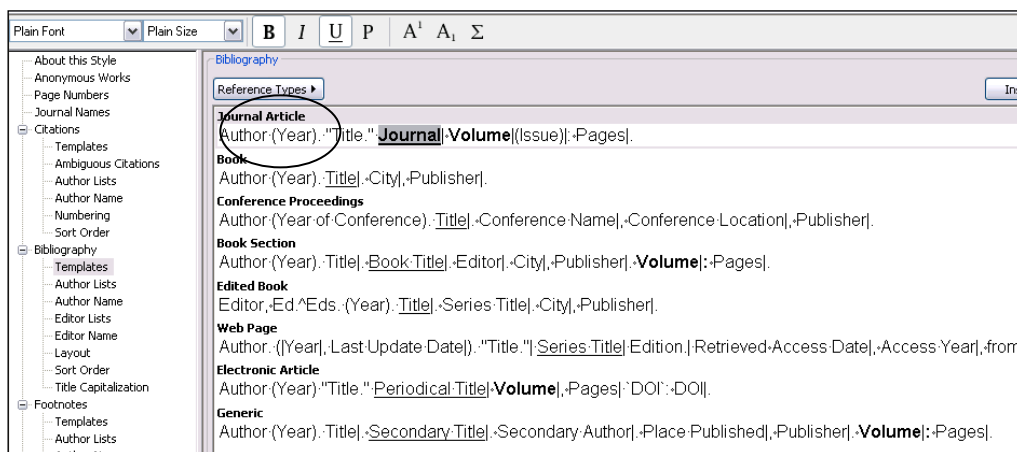- Change the author list options appropriately.

A bibliography example

You may want to change the title of the journal from underlined to bold within your bibliography reference.

Within the **bibliography** section:

- Click on **templates**
- Under the **journal article reference type**, select the word **journal**
- Use the **formatting buttons** at the top to change to bold.

You can then save a **copy** of the style.

<div style="border:1px solid #000; background:#ccc; padding:10px;">

Tip: Saving changes to styles

If you modify an existing style or download a new style, create a new folder called Styles in the .Data folder of your EndNote library.

If you are using a networked PC in a computer room and want to be able to see your modified style again, save to your Z (network) drive. However, you must then make sure that EndNote is directed to your Z drive for this style.
- Go to the **edit** menu in EndNote
- Click on **preferences**
- Click on **folder locations**.
The location should be: Z:\EndNote\Styles

</div>

Printing References

In order to simply print out a list of references:

- **Highlight** the relevant references (use the **ctrl** key to highlight several at once)
- Select a reference style, e.g. **Author–Date** or **Numbered** from **Bibliographic Output Style** drop-down menu
- Either

- o Choose **Print** from the **File** menu. A standard print dialog will appear.
- o Click **OK** to begin printing.
- Or
  - o Click on **Edit > Copy Formatted**
  - o Go to a Word document and **paste**

Section 10: Using EndNote with Word 2010 and 2007

EndNote works with Word to create a paper with properly formatted citations and bibliography. This is done using the "Cite While You Write" (CWYW) toolbar. An EndNote tab is added to **Microsoft Word's ribbon**, giving you direct access to your references while typing your document.

## Insert an EndNote Citation into the Paper

Open Word:

- Click on the **Start** button
- Click on **All Programs**
- Click on **Microsoft Office**
- Click on **Microsoft Word**

Open an existing paper or begin typing a new paper.

You should see that a tab for **EndNote X7** is available at the top of the screen. Note that you always need to have your EndNote library open when working with Word.

- Click on the **EndNote** tab
- Click on **Insert Citation** in the top left-hand corner, then down to **Insert Citation** again
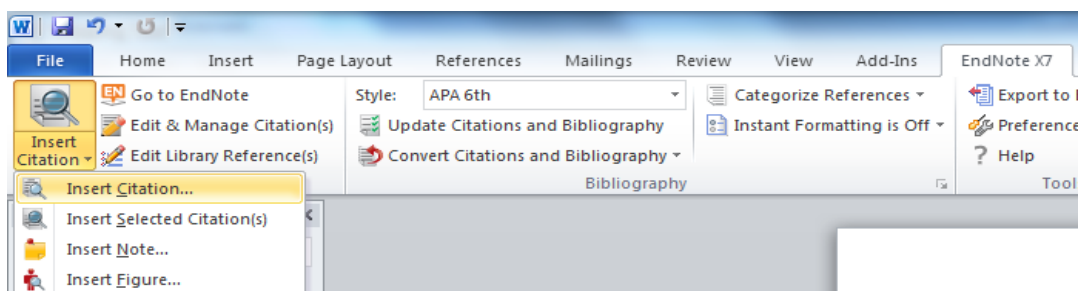
**Insert citation** will open a window where you can **Search** EndNote for the reference you require.

- **Highlight** the appropriate reference then click on **Insert**. This will add the reference into the text in Word and begin creating the bibliography.
- Repeat the process until all references have been inserted.

Alternatively:

- Click on the **Go to EndNote** option
- **Highlight** your chosen reference from within your EndNote library
- Click on the **Insert Citation** button
- **Save** your document.

Format with a different bibliographic style

To format your reference list according to the reference style of your choice, click on the **Style** drop-down menu in the second column.
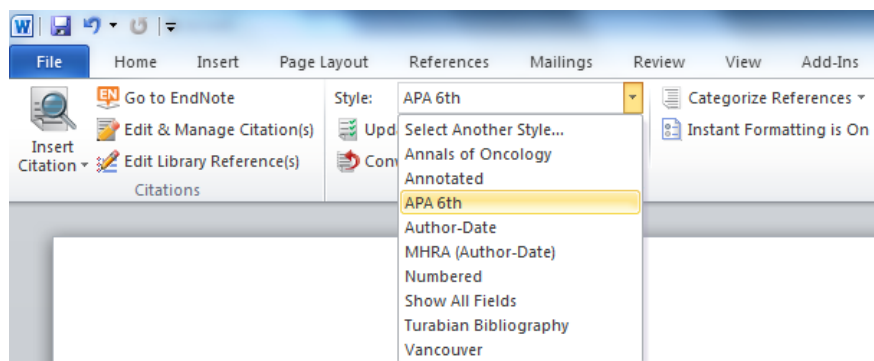
You will see some default styles such as Author-Date and Numbered and any other styles that you have previously selected or saved as favourites

Select a style and you will see that your in-text citation and bibliography will be reformatted according to that referencing style.

To see a full list of output styles, click on **Select Another Style** from the drop-down menu and click on the style of your choice to reformat.

To browse styles by subject category rather than alphabetically, click on the **Category** heading.

If you don't see the style that you want

- Go back to your **EndNote** library
- Click on **Edit,** then **Output Styles**
- Click on **Open Style Manager** and click on the **Get More on the Web** button.

Editing a citation in the text of your document

Once a citation has been added, it is possible to edit to remove the author, add page numbers etc.

Removing the author using a Harvard style

- Place your **cursor** on the citation
- Click on **Edit & Manage Citation(s)** from the menu at the top

- Click on the **drop-down menu** next to **Formatting**
- Select **Exclude Author**
- Click on **OK**
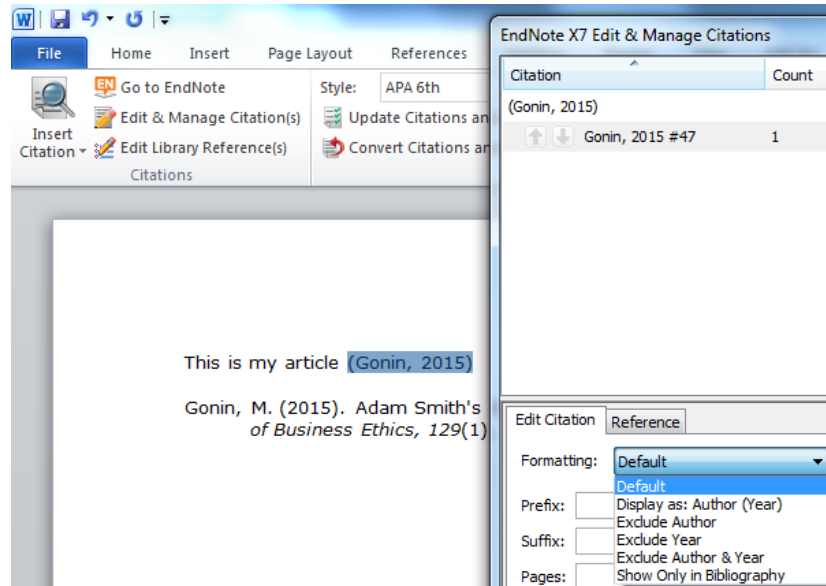
In this way, Smith (Smith, 2003) argues that… can then be turned into Smith (2003) argues that…

Alternatively, you can remove the author at the point of inserting the citation.

- Click on **Insert Citation**
- **Find the citation**
- **Highlight** the relevant citation
- Click on the drop-down menu beside **Insert**
- Select the appropriate option

Including page numbers in your in-text citation

- Click on the **Edit & Manage Citation(s)** option in the top menu bar
- **Highlight** the appropriate citation
- Enter the page number(s) in the **suffix** box, adding p. or pp. before the number if you wish this to display

Other editing options

Removing citations from the text but leaving in the bibliography

- Place your **cursor** on the citation

- Click on **Edit & Manage Citation(s)** from the menu at the top
- Click on the **drop-down menu** next to **formatting**
- Click on **Show Only in the Bibliography**

**Deleting a citation**

Behind each citation you insert is a large amount of hidden coding. You therefore cannot simply remove a citation using the <Delete> or <Backspace> keys, or the 'Undo' button in Word. To remove a citation completely

- Click on **Edit & Manage Citation(s)** from the menu at the top
- Click on the **Edit Reference** drop-down menu
- Select **Remove Citation**
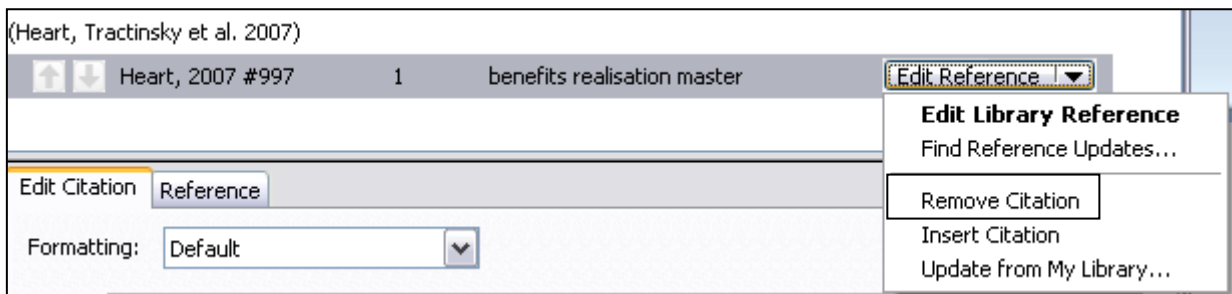
Working with unformatted citations

You can turn instant formatting off if you don't want your bibliography to be created as you go along. When you are ready to create the bibliography you can update your citations at this stage. It is recommended to turn off instant formatting if you are moving between different versions of EndNote. To turn off instant formatting, click on **Instant Formatting is On**
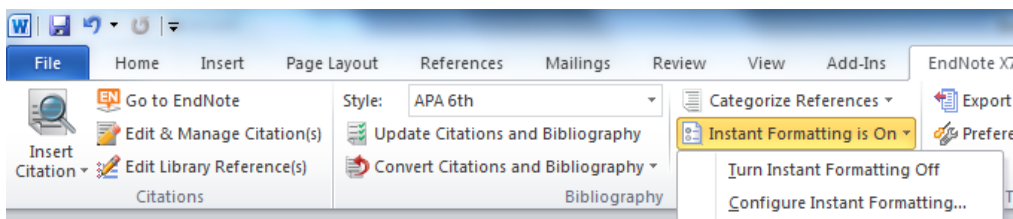
Once you are ready to create your bibliography, click on **Update Citations and Bibliography** from the middle bibliography tab.

Switching between EndNote and EndNote Online

- In Word 2010 or 2007, to switch between working with EndNote and EndNote Online:
- Click on **Preferences** in the third column of the **EndNote** tab

- Choose the **Application** tab

- Select **EndNote Online** from the **Application** drop-down menu

- **Login** with your email address and EndNote Online password

- Click on **Go**

> **Tip:** You can also insert citations or bibliography entries into Microsoft PowerPoint. This is only available for Windows. The same level of functionality as those in Word is not available in PowerPoint. For example, if you need to change the style, or edit citations or references, you will need to delete them and start again.

Section 11: Syncing your EndNote and EndNote Online Libraries

You can set your EndNote desktop and EndNote Online library to sync. This means that you can work with both systems.

- To enable sync, you must have the most recent version of EndNote Online available. Click on **Edit** > **Preferences** > **Sync**

  - Click on **Enable Sync**

  - Either **Create a new EndNote account**, or enter your **EndNote Online username and password** to upgrade to the most recent version of EndNote Online

- Click on the **Sync** button

- Enter your **EndNote Online username and password**. The first time you sync a library, you may need to fill in your registration details

- Click on **Sync**

- When prompted to create a compressed library backup, choose **yes** and **save.** This will save a backup library for you. However, subsequent syncs will not update this backup. Remember to save a backup copy after making any changes.

You should then find that the same references are found within both your EndNote and EndNote Online library.

> **Tip: Signing up via the Web of Science**
>
> If you have already signed up for additional features and alerts in the Web of Science, you can use this same password for EndNote Online. However, this allows you to access a reduced version only. Follow the instructions above so that you upgrade your EndNote Online account to gain additional storage space and more output styles and database filters.

Your sync status will be shown in the left-hand frame
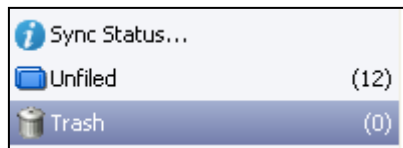
If you do not have an EndNote Online library already set up, click on the **Sync** button from the main page

- Click on the **Sign Up** button.

Setting sync preferences

You can set preferences to automate the EndNote syncing process:

- Click on **Edit** from the main menu
- Click on **Preferences**
- Click on **Sync**
- Tick the **Sync automatically** box. In the background, your library will sync with EndNote Online. When this happens, you will see **Sending Updates** at the bottom of your screen.

Tip: Sync one library only
Do not sync more than one desktop library with your EndNote Online library as there is the possibility that it could merge references from different libraries together. It is always recommended to have one EndNote library and use the groups function to manage and organise references.

Section 12: Exit from EndNote

Exit from EndNote by choosing exit from the **file** menu

Section 13: Further Information

For frequently asked questions, see: http://endnote.com/support/faqs

For information on how to reference particular types of material, see:

http://www.nottingham.ac.uk/studyingeffectively/writing/referencing/index.aspx

If you have any further queries, please contact the Library Helpline:
http://www.nottingham.ac.uk/library/help/libraryhelplineform.aspx or library-helpline@nottingham.ac.uk .

Developing your EndNote expertise

Please refer to the documentation and training resources mentioned in Section 1 of this booklet

Appendix

Downloading from commonly use databases

The table below shows how you would download from some of the more commonly used databases.

Remember that databases can be provided by different suppliers. Make sure you download the correct supplier's filter. If in doubt please contact the Library Helpline: http://www.nottingham.ac.uk/library/help/libraryhelplineform.aspx or library-helpline@nottingham.ac.uk .

Supplier	Database	Downloading from database	Importing into EndNote
CAJ	**China Academic Journals**	- Mark reference of interest - Click **Save** - Select level of detail and click **EndNote** - Click **output to local** - Click **open** and a Notepad document will open - Click **Save as** and select Save as type: **Text Documents (*.txt)**	- Click on **Import > File** **Import File**: choose the file saved from **CAJ** **Import Option**: select **Other Filters**, choose **EndNote Import** **Text translation**: select **Unicode (UTF-8)** - Click **Import**
CAS	**SciFinder**	- Click on **Export** - Choose **Citation export format (*.ris)** - Click on **Export** - Click on **open**	Correct import filter is selected automatically
EBSCO	**British Education Index** **Business Source Premier** **CINAHL** **ERIC** **Historical Abstracts**	- Add references to folder - Go to **Folder view** - Click on **Export** - Select **Direct Export in RIS Format** - Click **Save** - Click on **open**	Correct import filter is selected automatically
Ei (Chrome)	**Ei Compendex (Engineering Village)**	- Click on **download** - Select **My PC** under **Location**	Correct import filter is selected automatically Some manual editing is necessary, e.g. the

		• Select **RIS (EndNote, Ref. Manager)** under **Format** • Click on **save** • Click on **open**	part/issue number is sometimes not picked up
Elsevier	**Science Direct**	• **Mark** references • Click on **export citations** • Export file format: Choose **RIS format (for EndNote, Reference Manager, ProCite)** • Content format: choose level of information that you require • Click on **export** • Click on **open**	Correct import filter is selected automatically
Elsevier (Chrome)	**Scopus**	• Click on **export** • Choose **RIS format** • Choose the level of information that you wish to be imported • Click on **export** • Click on **open**	Correct import filter is selected automatically
Google	**Google Scholar**	There are 2 options **Changing Scholar settings** Go to **Settings** on the main Scholar search page • Set up the **Bibliography Manager** to show links to **import into EndNote** • **Save** Go back to your results in Google Scholar • Click on the **import into EndNote** link • Choose **open** file **Exporting from the publisher page** • Click on the **title link** within your Google Scholar results to go to the publisher homepage. • Better export options may then be available.	Correct import filter is selected automatically Some manual editing may be required. Only the bibliographic details will be imported, but a link back to Google Scholar will be included.
Hein	**HeinOnline**	• Below search results, select **Save to MyHein bookmarks**,	Correct import filter is selected automatically

		then click **Save**	Only records designated as articles can be exported. Any other references will need to be entered into EndNote manually.
		• Enter a tag to identify this set of results (optional), then click **Enter into research**	
		• Ignore the message about registration that appears; click **here** (in red – **To view your saved bookmarks to date, click here**)	
		• Tick appropriate bookmarks (the **Check All** button is recommended)	
		• Click the down arrow next to **Options**, and select **Export to EndNote > submit**	
		• In the *File Download* pop-up box, click **Open**	
IEEE/IET	**IEEE/IET**	• **Mark** references	Correct import filter is selected automatically
		• Click on **download citations**	
		• Choose the level of information	
		• Choose format: **EndNote, Procite, Refman**	
		• Click on **download**	
NLM	**PubMed**	There are 2 options:	Correct import filter is selected automatically
		Searching within the PubMed website	
		• Mark references	
		• Click on Send To	
		• Choose citation manager	
		• Click on create file	
		Searching PubMed from within EndNote	Correct import filter is selected automatically
		• In EndNote Click *on* **online search mode** and then **PubMed**	
		• Enter your search	
		• Choose how many references you wish to import	
		• Click on **OK**	
OVIDSP	Various databases including:	• Click on **Export**	Correct import filter should be selected automatically,
		• Choose **export to**	

		EndNote	but if not choose **Ovid Nursing Database (OvidSP)** as the **Import Filter**
	• **AMED** • **CAB Abstracts** • **EMBASE** • **Food science & technology abstracts** • **International Pharmaceutical Abstracts** • **Medline** • **PsycINFO**	• Choose the amount of information to export. It may work better if you select **complete reference** • Click on **export citations**	Some manual editing may be required. E.g. when downloading from CAB Abstracts or Medline the year may be missing. (Exporting the **complete reference** rather than just the citation should solve this.)
Proquest	Various indexes including: • **ABI/Inform** • **ASSIA** • **Biological Sciences** • **British Humanities Index** • **EconLit** • **Environmental Sciences & Pollution Management** • **IBSS** • **Medline**	You may first need to disable pop up blockers (tools > popup blocker > turn off popup blocker, or, internet options > privacy > untick turn on pop up blocker) • Click on **share/save** • Choose **export/save** • Choose **EndNote, Citavi, or Reference Manager** in Output to option • Click **continue** • Request Complete will open in a new window • Click on **open**	Correct import filter is selected automatically
Thomson Reuters	Web of Knowledge including: • **Web of Science** • **BIOSIS**	• Mark references • Click on **send to EndNote desktop** (choose from the drop-down list) • Choose level of **Record Content**, click **Send** • Click **open**	Correct import filter is selected automatically
Westlaw	**Westlaw UK** (*journals* search only)	• Look for the envelope icon top right • Click the down arrow, and select **Add to EndNote** • Select level of information and click **Submit** • Click **open**	Correct import filter is selected automatically