Introduction to EndNote 20 for Windows

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Extra support and tutorials are available from:

EndNote website: http://www.endnote.com/ (click on 'Training' on top right of page)

EndNote's Youtube channel: https://www.youtube.com/user/EndNoteTraining

1   Introduction: What is EndNote?

EndNote is bibliographic (or referencing) software used to format citations (references) downloaded from databases, Library Search, Google Scholar, or created manually. EndNote can create bibliographies (reference lists) in many different referencing styles. An EndNote library can contain up to 100,000 references.

The software allows you to:
- Attach PDFs of articles to citations (manually or using the 'find full-text' feature)
- Arrange citations in groups
- Insert in-text citations into Word and create a list of references automatically
- Sync your library between EndNote desktop and EndNote Web (you can only sync one library)
- Share an EndNote library with other EndNote users (you share only one EndNote library)
- Put your EndNote library on a portable hard drive and use it with multiple computers
- Use the File>Compressed Library command to make backups of your library

Important! Please note:
- Most records downloaded into EndNote need editing
- It is advisable to have only **one** library and use groups
- It is advisable to back up your EndNote library to EndNote online or your University of Waikato Home(H)s drive
- **Webpages:** To capture website information you must either create a manual entry, or use the 'Capture' function to extract reference information from certain webpages, into either EndNote Web or EndNote Desktop. With the 'Capture' function, before beginning, you need to create an EndNote account at www.myendnoteweb.com, click on 'Downloads' and install the Capture Reference tool

2   EndNote & Cloud Storage: OneDrive, DropBox, iCloud etc
- Do **NOT** store working EndNote libraries in cloud-syncing folders such as **OneDrive**, **Drop Box, iCloud**, etc., or keep read-write EndNote libraries on network drives or flash drives is as it **can corrupt EndNote libraries**
- Make sure your EndNote Library is NOT in a folder that is being synced by OneDrive. Help here
- If you want all your references available on all your computers, online, and on your iPad, use one EndNote library and sync it to EndNote online (ask your librarian how to do this)

Tutorials and Videos from EndNote http://clarivate.libguides.com/endnote_training
- Includes the basics of EndNote on Windows or Macintosh in 30 minutes
- The above two videos (Windows or Mac) are for x9 but are still relevant
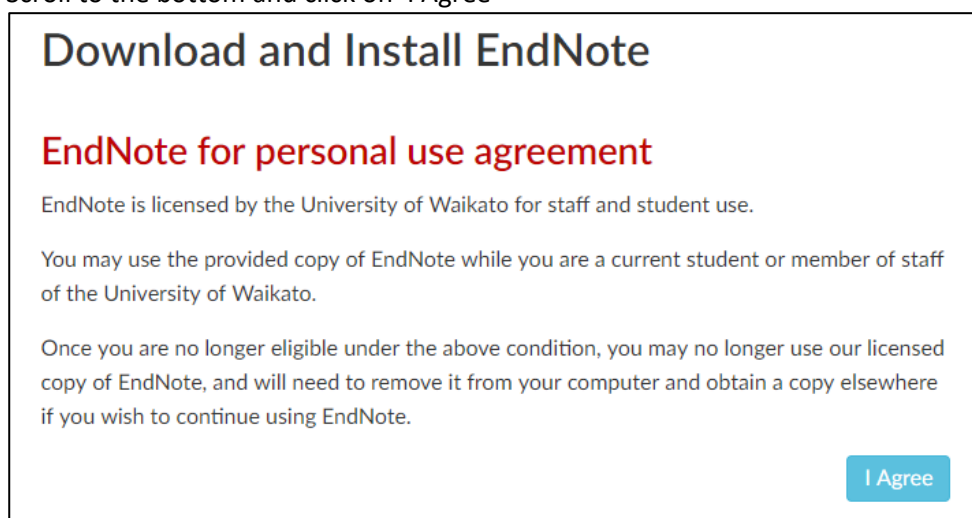
3 Download EndNote 20

EndNote is installed on most University computers and the University has a site license so that EndNote software is free for students and staff to use on their personal computers.

If EndNote is NOT on your University computer, or you need an upgrade or help to download it on your personal computer, contact the ITS Service Desk (07) 838 4008 or email help@waikato.ac.nz.
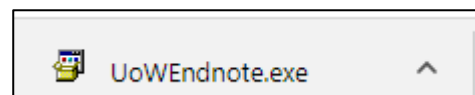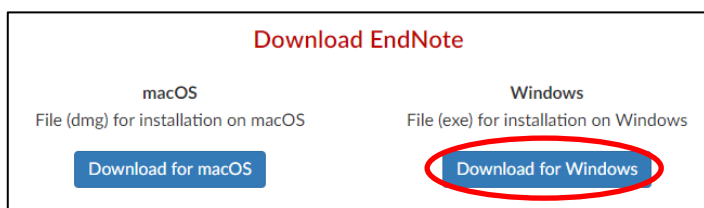
To download EndNote on your own computer go to
https://www.waikato.ac.nz/library/study/guides/endnote/endnote-download

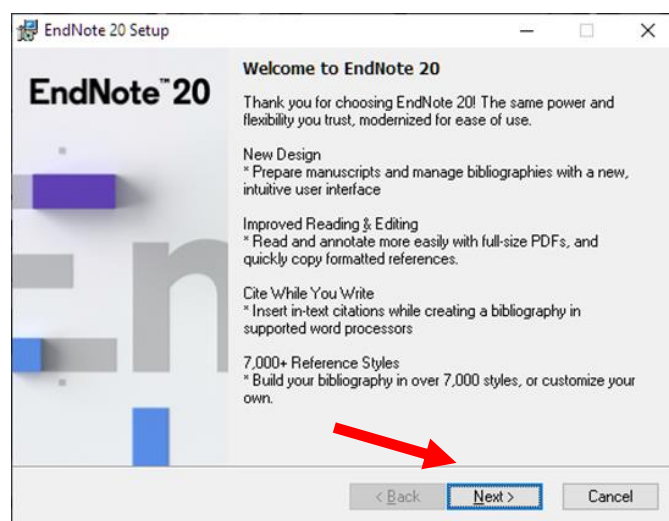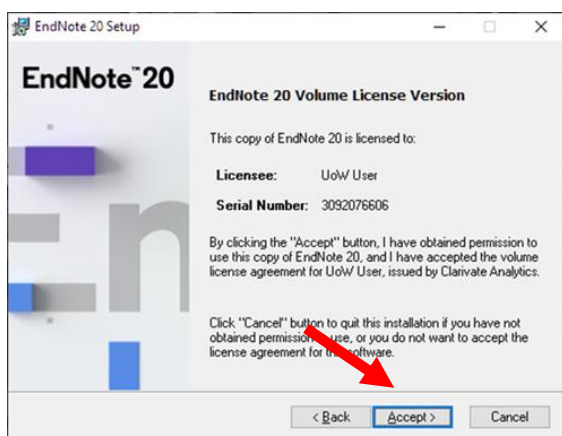Scroll to the bottom and click on 'I Agree'
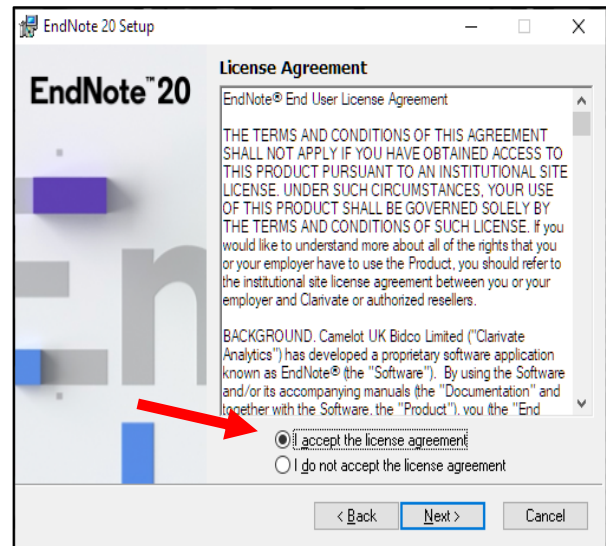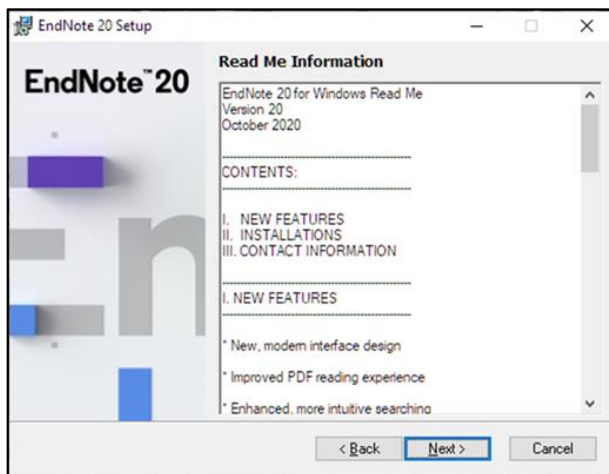

Click on 'Download for Windows'

The EndNote installer file will appear as a download,
once it has downloaded, click on it to open it.
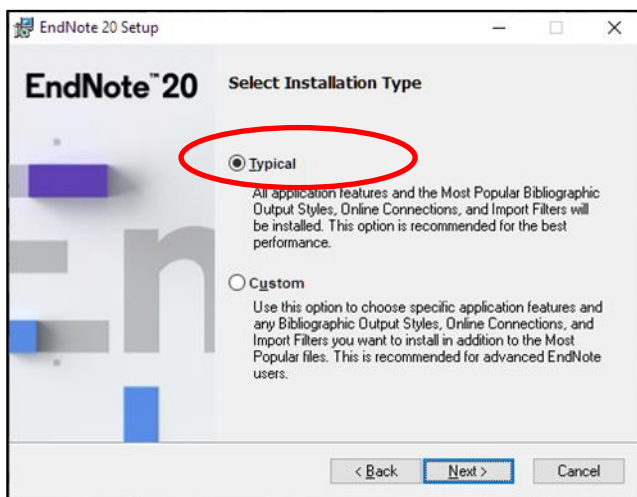
Click 'next' to continue with the set up process.

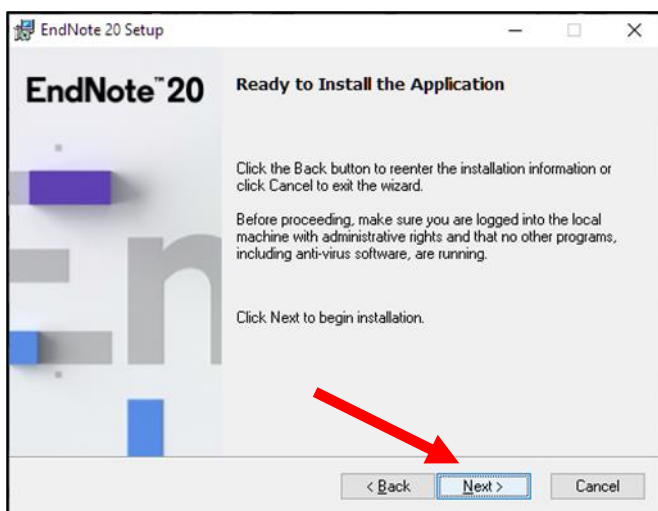Click 'accept' to confirm you have permission to install the software

The following images will guide you through setting up EndNote. Click 'next' until you get to 'finish'.
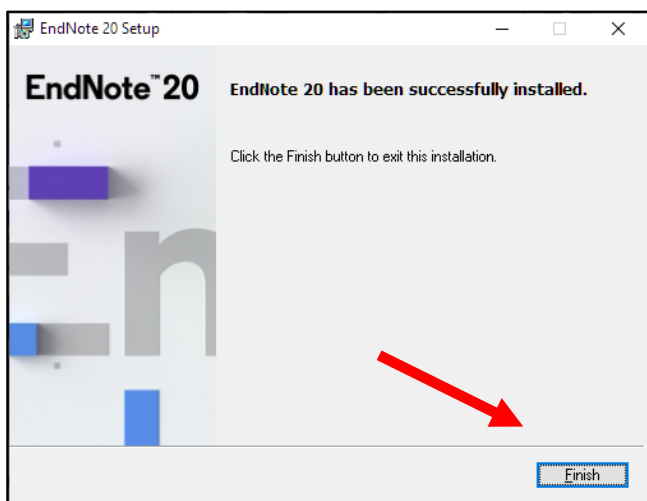
Choose the 'typical' installation type

If a window appears asking if you want to allow EndNote to make changes to your device select **'Yes'**

If prompted, complete the 'set up your account' process, which includes creating an online EndNote account at www.myendnoteweb.com as this enables you to sync your library to the cloud which provides a backup copy of your library. **If you already have an EndNote web account, you do not need to do this.**

You are now ready to use EndNote 20 on your computer.

4   Open a new EndNote Library

If you have just installed EndNote, the program will be open. If not, click on the Windows icon and locate EndNote 20, click on the 'EndNote 20' application to open it.

Right click on the application and pin to your task bar so it is easy to access in future.
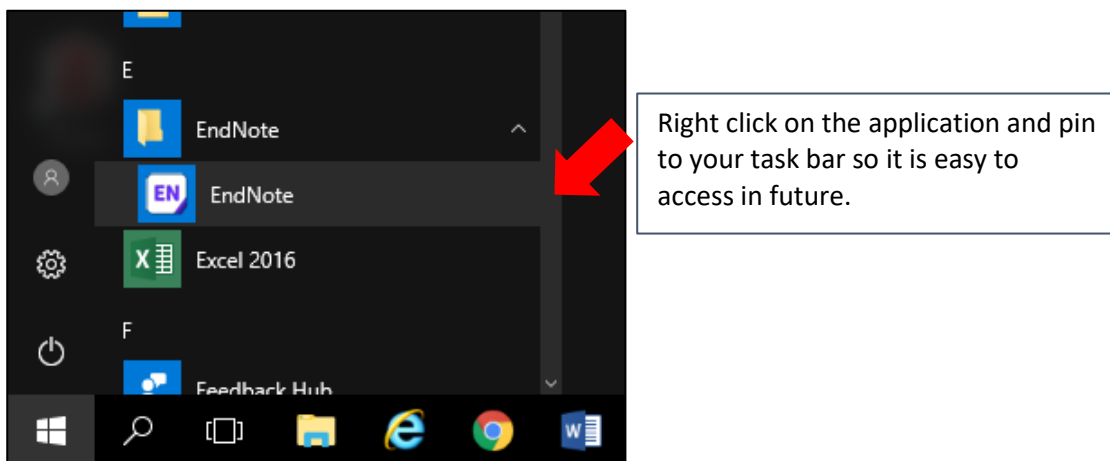
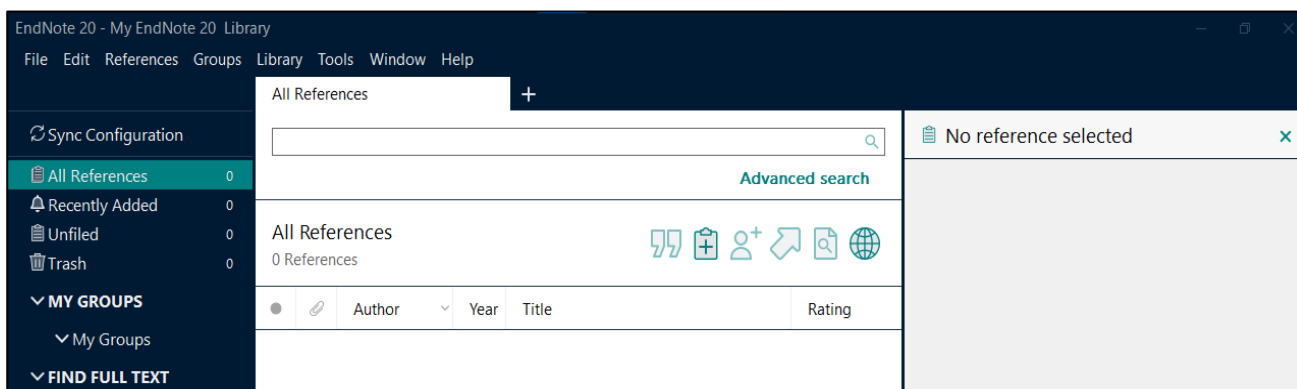Once EndNote is open, click File > New to open a new EndNote Library.
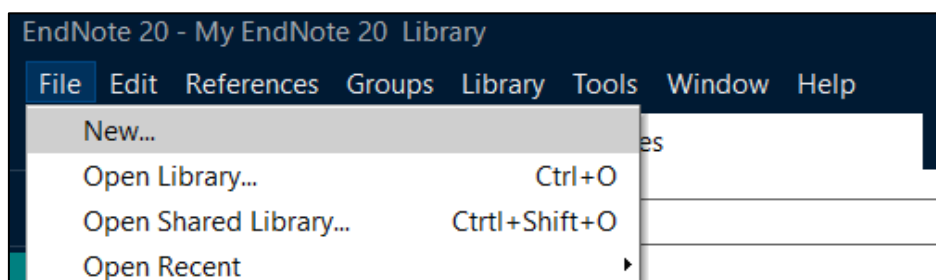
5   Saving your EndNote Library

DO NOT save your EndNote library to your desktop, or to downloads. This can result in you working on multiple copies of your EndNote library which is undesirable.

To save this EndNote Library to your computer, from EndNote click on File > Save and navigate to your documents, and then create a folder called 'EndNote'.
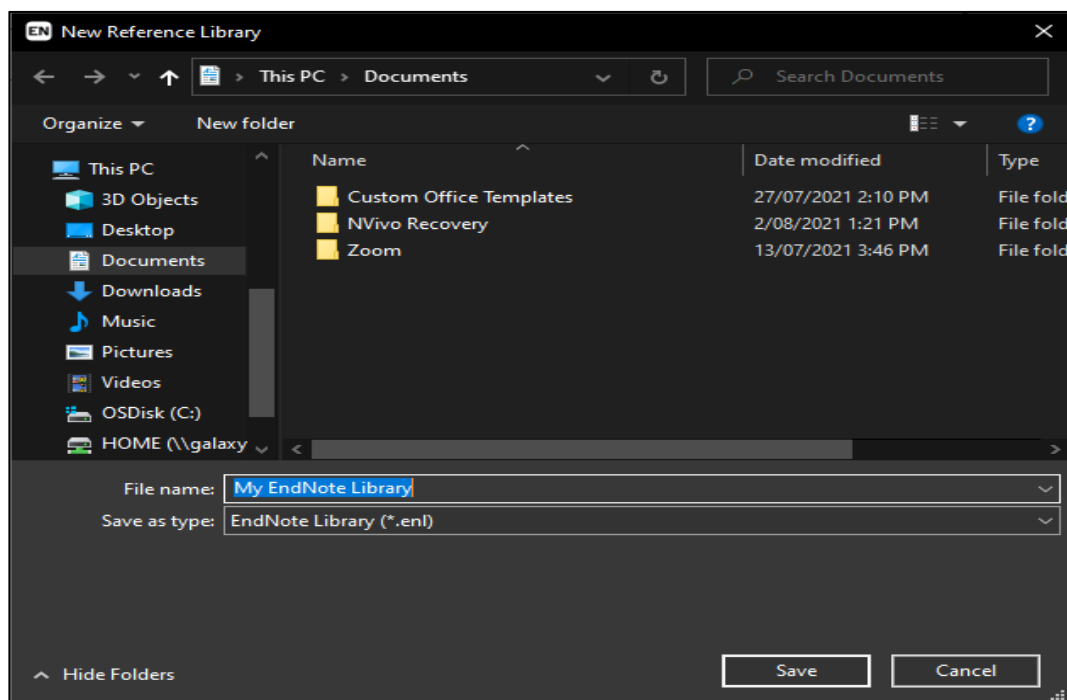
Your newly created EndNote library is empty.   See next page for an overview of the interface.

6   Endnote Interface

Create a new manual reference

View attached PDFs

View details of references

Set the reference style

Organise your library with groups

Reference library

Always check the reference preview

7   Add journal article citations to your library using Library Search

Web Browsers: It is advisable to use Chrome or Firefox as Safari and EndNote can have issues.

(Get more detailed records for journal articles by clicking through to the database from Library Search. Look for 'export' or 'download citation' then choose EndNote or RIS format).

Navigate to the University of Waikato Library, find the article 'The state of accounting education scholarship in New Zealand', and click on the ellipsis (…) to the right of the title

Click on 'download'

Click on the downloaded RIS file
on the bottom left of the screen
'Primo_RIS_Export.ris'

The citation will now show in the 'imported references' in your EndNote Library.
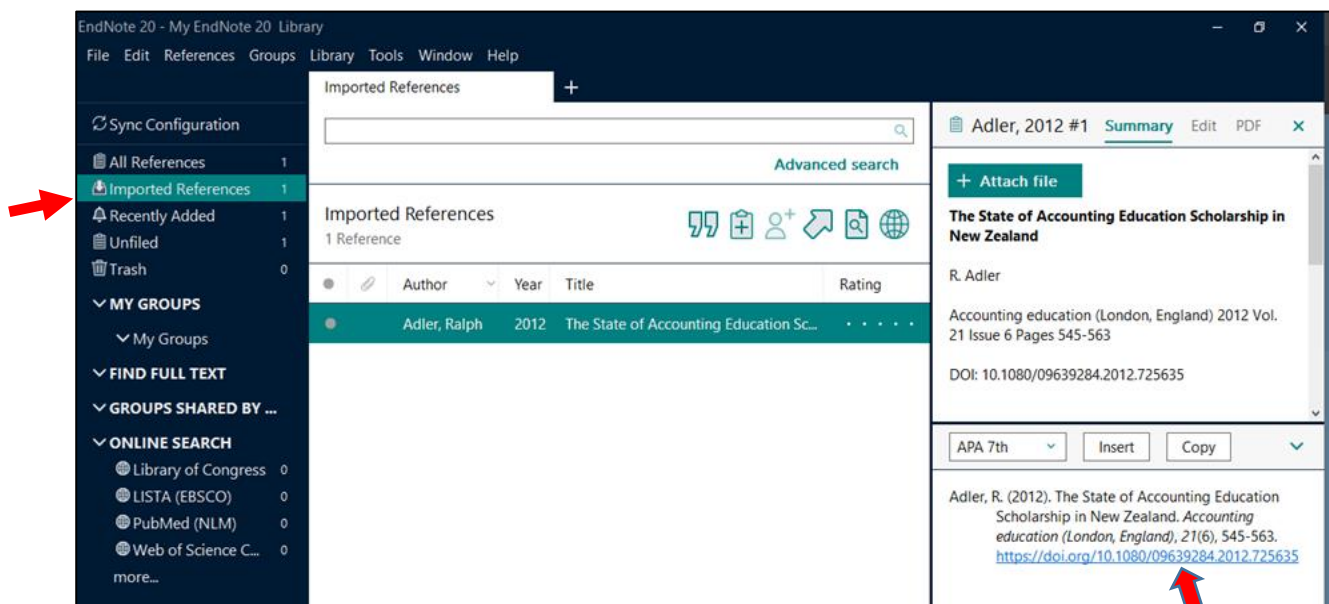
Always check the Preview

Above is an item record for a downloaded citation. Click on the display options to arrange the view to suit. Check the preview to check that the reference displays correctly in your chosen reference style (APA in this instance). For this entry **E**ducational and **S**oftware should be lowercase

Editing a record.

As shown below, click on the edit in the right pane; in the window that opens edit the relevant fields, click on save on the top right of that window to close the record you have just changed.
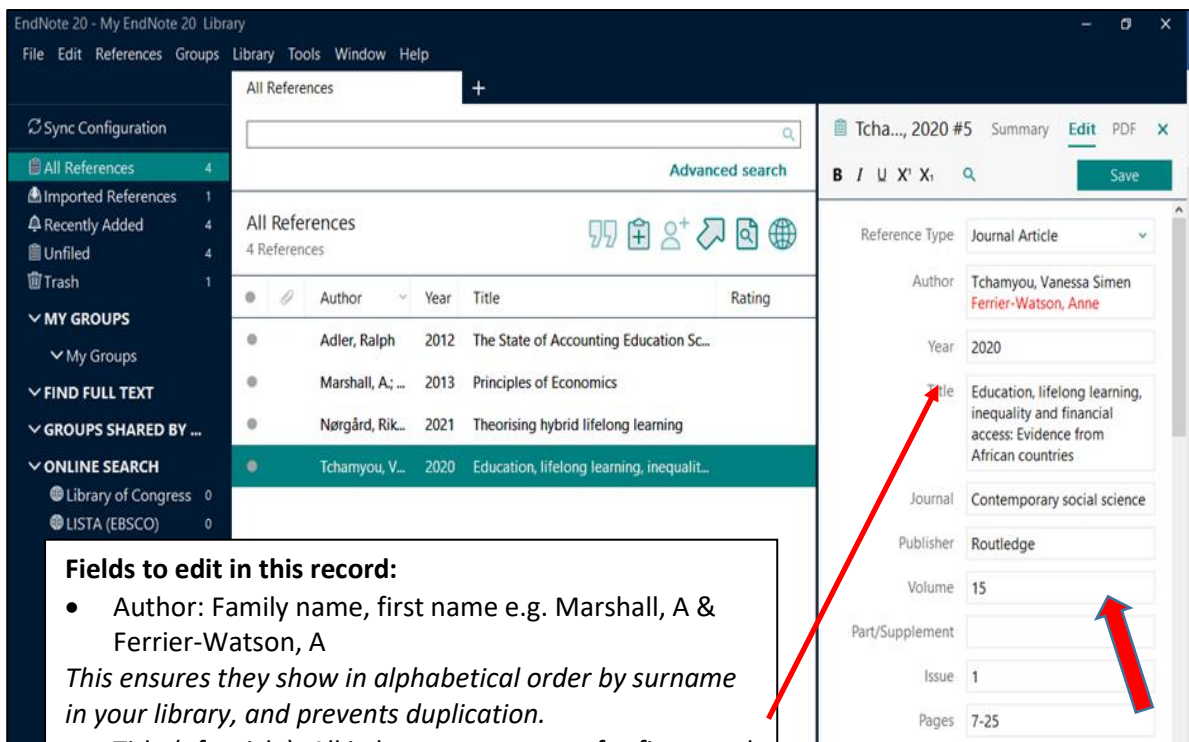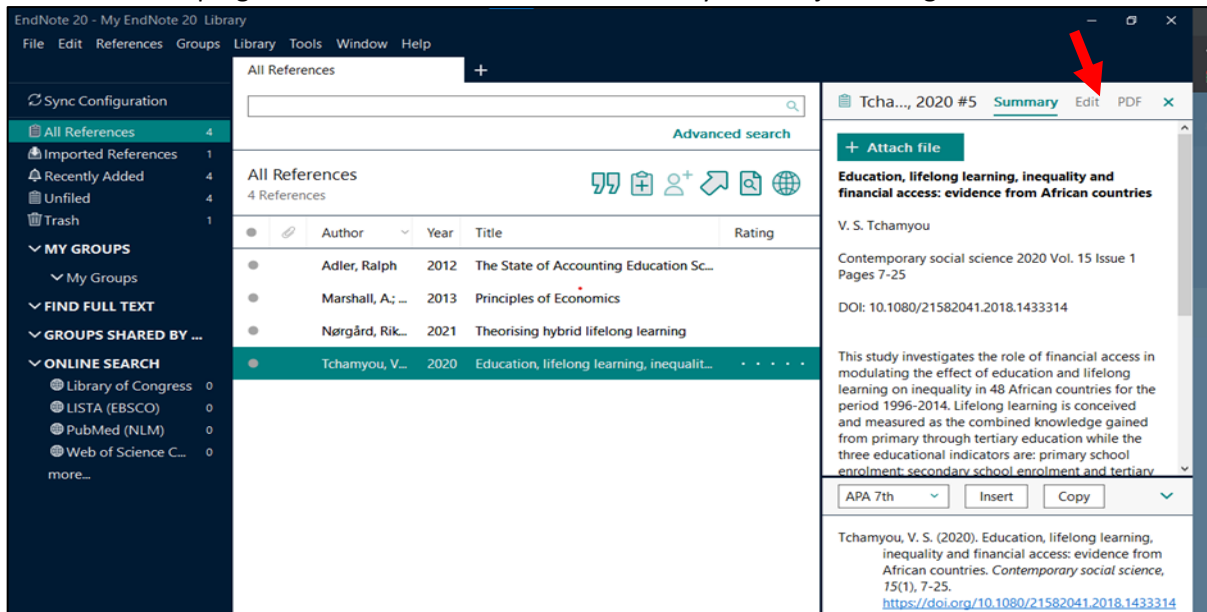
Fields to edit in this record:
- Author: Family name, first name e.g. Marshall, A & Ferrier-Watson, A

  This ensures they show in alphabetical order by surname in your library, and prevents duplication.
- Title (of article): All in lower case except for first word or proper nouns
- Journal name: Remove 'amp;' after &

Record display area

This is the latest format for DOI in APA Style. If the DOI does not display correctly ask your Liaison Librarian for

Tchamyou, V. S., & Ferrier-Watson, A. (2020). Education, lifelong learning, inequality and financial access: Evidence from African countries. *Contemporary social science, 15*(1), 7-25. https://doi.org/10.1080/21582041.2018.1433314
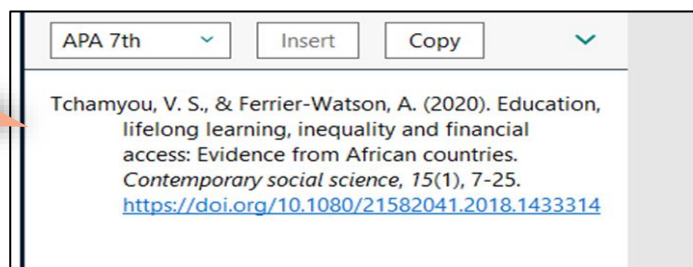
8 Adding references manually

Sometimes you have to enter a reference manually. Websites are best done this way. Click on the New Reference button. This will open a window with spaces for entering the individual details of a reference
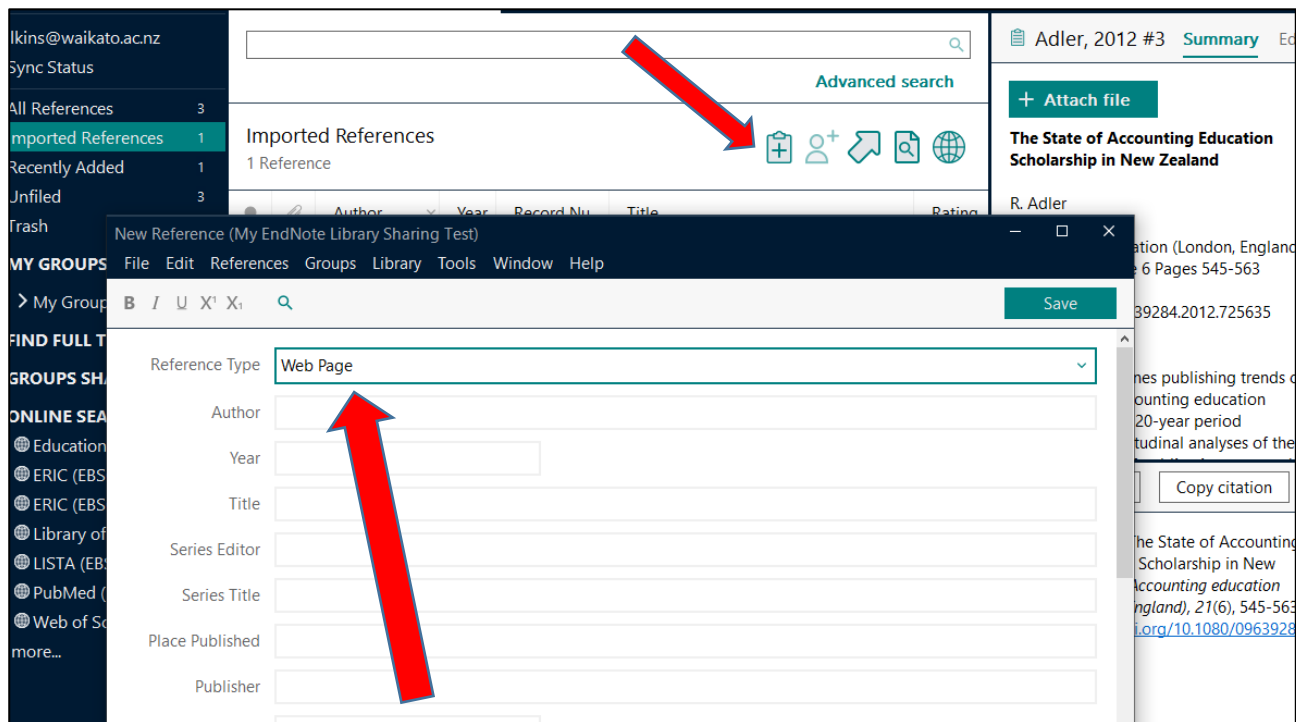
| First select the correct reference type | For a website scroll down to paste in the URL address |

- Select the correct reference type
- Copy and paste the URL into the URL field – you might have to scroll down to find it
- Copy and paste the title into the title field
- Find a date – it might be at the bottom of the page – if you cannot find one enter n.d. for no date
- Find and author – it might be a corporate author – if it is you have to put a comma after the author to stop EndNote converting the name into a surname and initials
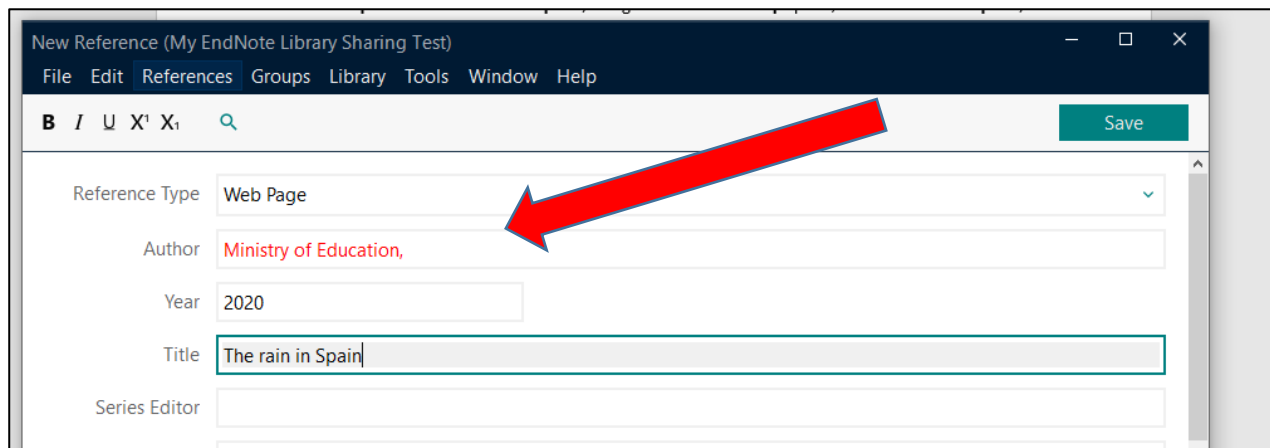
9   Add edited book citations to your library using Library Search

For edited books you must reference individual chapters within that book. The imported record will show the book editors as authors, which is **not** correct.
For the citation to display correctly use **'book section'** as the item type.
You will need to edit the fields accordingly:
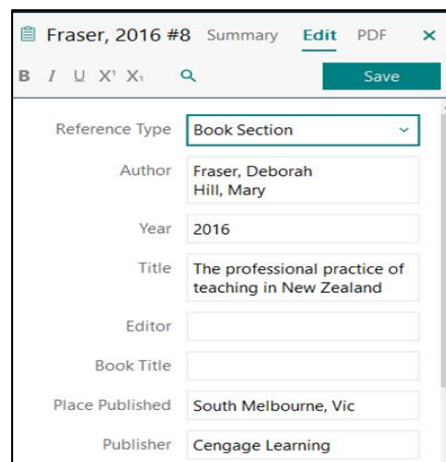
- author (of chapter)
- year
- title (of chapter)
- editor/s of book
- book title
- add the page numbers (for the chapter)
- add edition

Repeat this for every chapter you use from the book.

Record tidying tips:

- Correct upper & lower case for titles
- Always use a capital letter after a colon (:)
- Omit punctuation from the end of all fields except for corporate author
- Omit 'vol.', 'p.', 'pp.' or ed. in the volume, pages, editor and edition fields.

Author Names:

- Family name, First Name
- One author name per line
- Write each author's name consistently e.g. so their publications appear together in your library and subsequently reduce duplication.

Wang, John R. OR Wang, J. R
Smith, Anne M. OR Smith, A. M

Corporate author
Ministry of Education,

Remove unwanted gaps in a citation preview by deleting spaces after the entry – e.g. there may be an invisible space or return after the entry.

10 Add citations from Google Scholar https://scholar.google.co.nz/

Firstly, change the settings in Scholar to export citations to EndNote

Google Scholar > Settings > Bibliography manager > Show link to import citations into EndNote

Search for an item in Google Scholar. From your search results, click on 'Import into EndNote'. If you are using Chrome the download will appear at the bottom left of your screen as a scholar.enw file. Click on it to send the citation to your EndNote library.
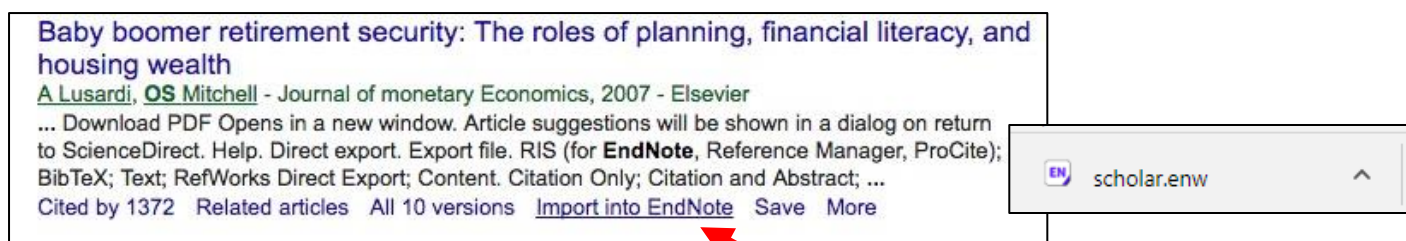
11 Troubleshooting when downloads don't automatically go to EndNote

If you get a message saying there is no application set to open your RIS or enw file, you need to tell your computer to always open it with EndNote.

Either select EndNote or select 'more apps' and navigate to the EndNote programme.

Tick 'Always use this app to open .enw files'

12 Capture citations from webpages

If you don't use website information often, it may be best to create manual entries (see 12).

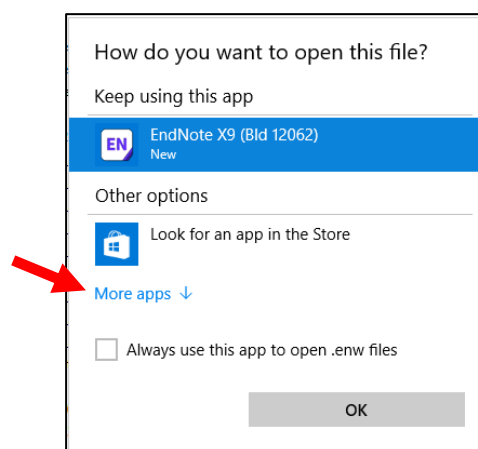You can use the *Capture* function to extract reference information from certain webpages, into either EndNote Web or EndNote Desktop. Before beginning, you need to create an EndNote Web account at www.myendnoteweb.com, click on 'Downloads' and install the 'Capture Reference' tool to your web browser.

## 13 Enter citations manually

If you can't download an RIS or enw file, the information must be entered manually.

- Click 'Ctrl + N' **or** References > New Reference to open up a blank record
- Select the relevant resource type (it defaults to 'journal article') and complete the required fields (you can tab between fields)
- Save the entry by closing the record window (X in top left of the record window)
- For a website, add (copy or type) the relevant information to Author. Year. Title and URL fields (the web address e.g. https://www.govt.nz

14 Export citations from a Waikato Reading List to EndNote

You can export entire lists of citations or individual items from a Waikato Reading List.

To export all, go to the relevant Reading List, click on view & export > export > RIS. An RIS file should automatically download. Click on it to send all the reading list citations to your EndNote Library.
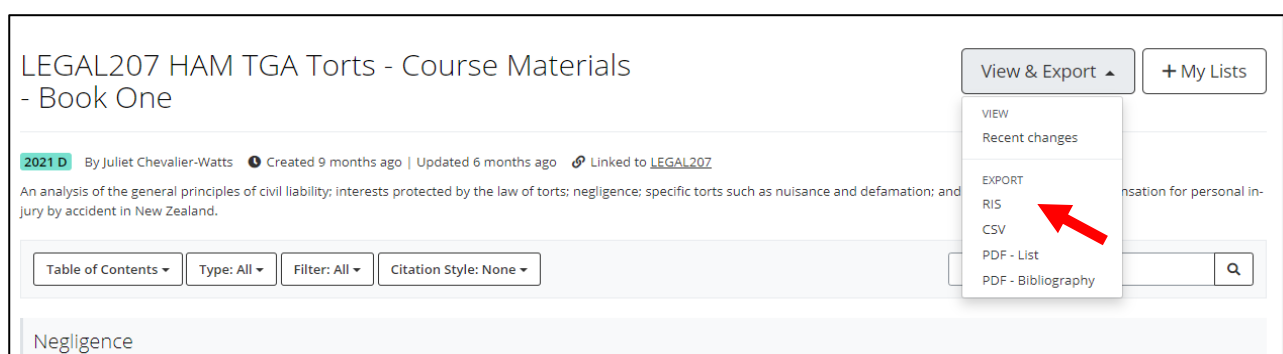
To export individual items, click on the desired title in the reading list > View actions menu> Download RIS.
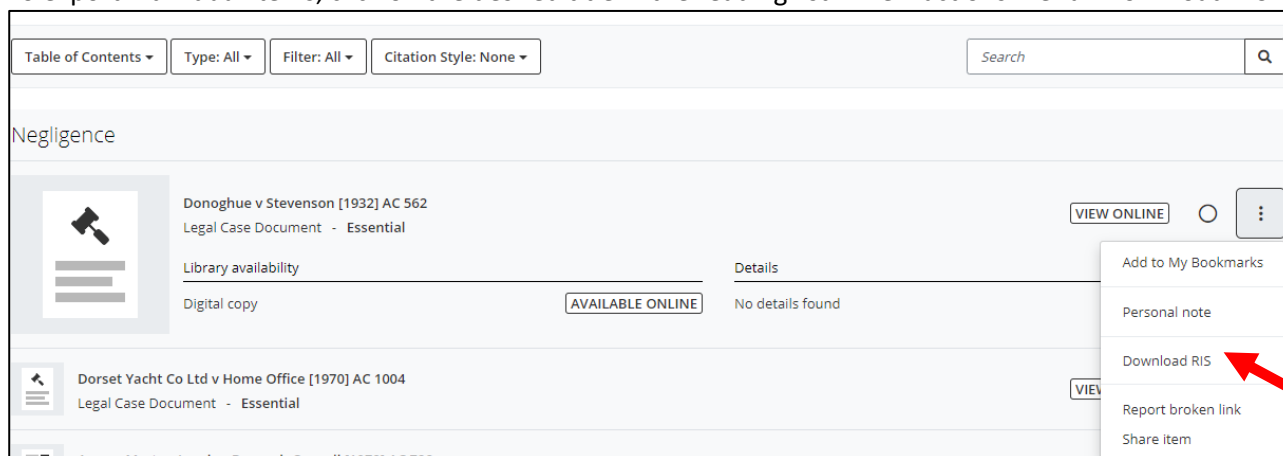
15 Attach PDFs to your EndNote Library

- Add PDFs to individual citations in your EndNote library
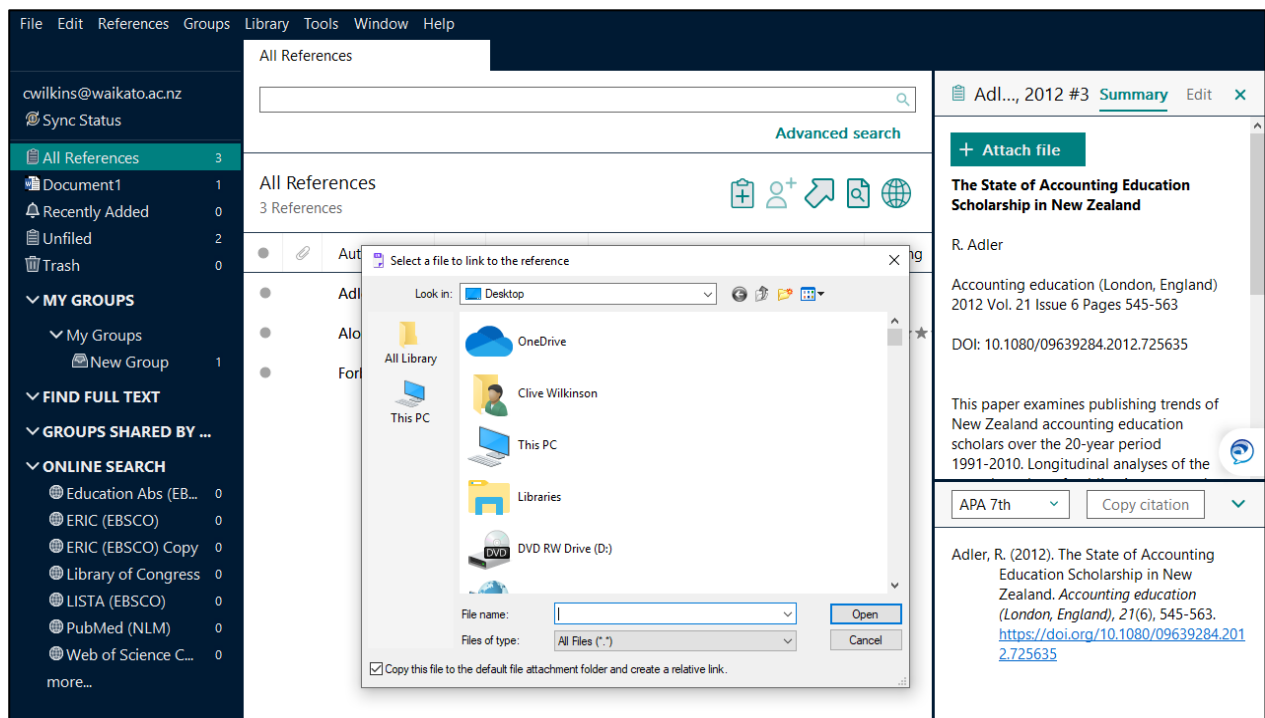- Add PDFS individually or in groups **without** an associated citation in EndNote
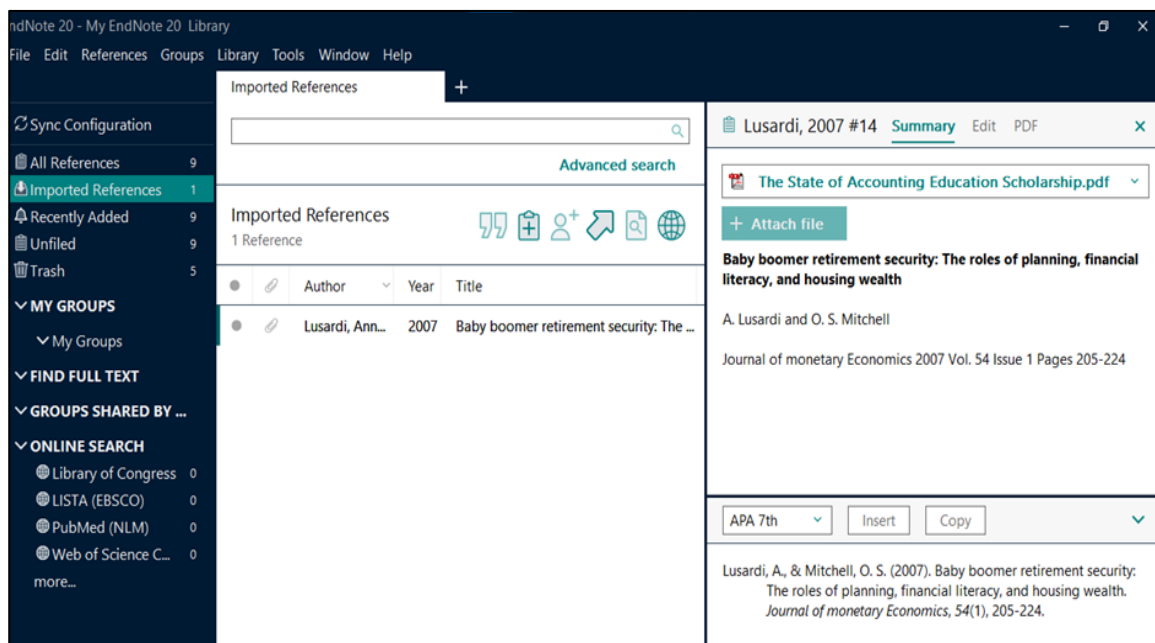- Use the 'Find Full Text' feature

15.1 Attach a PDF to an individual citation

Go to Library Search and find the article 'The state of accounting education scholarship in New Zealand'. Download the PDF. Save As onto your desktop.

Go to Endnote. Click on Attach File. Find the PDF and insert.

A paperclip icon appears to the left of the reference to show a PDF is attached.

15.2 Upload individual or groups of PDFs when no record exists

Click on File > Import, click 'choose' and navigate to your PDF. Change import option to **PDF**, click **Import**.
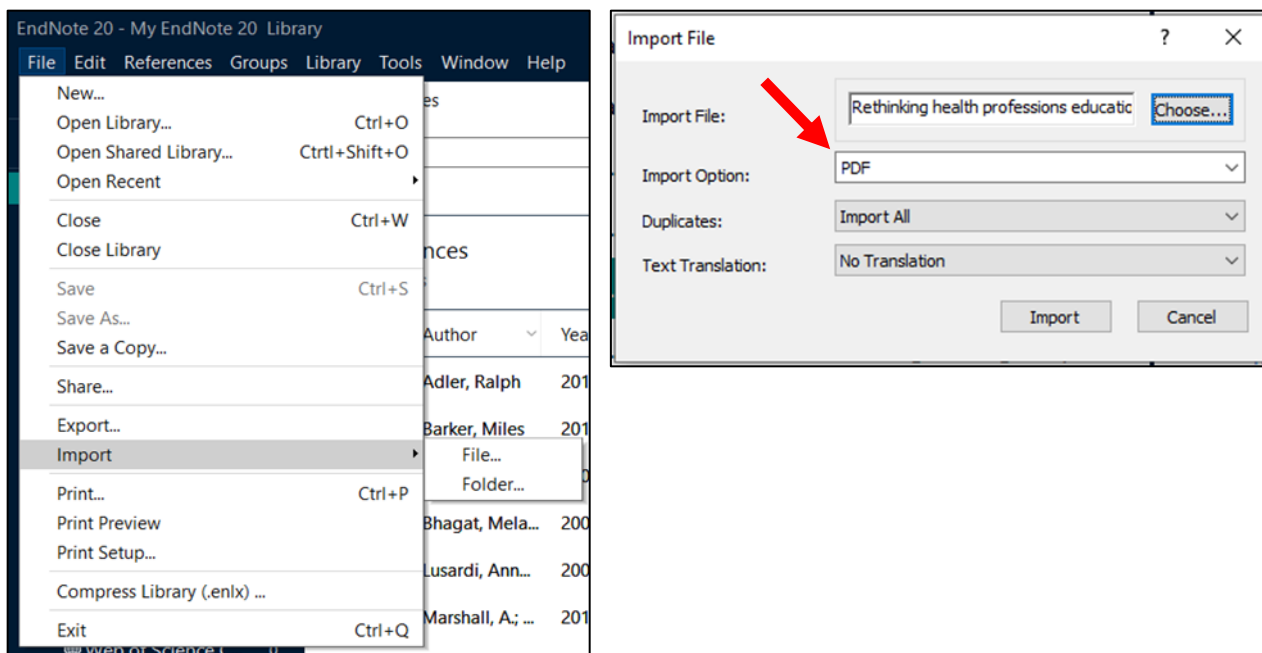
If the PDF has a DOI, EndNote will *sometimes* import the PDF **and** the citation details as shown below.

If the PDF has **no** DOI, the entry appears in <Angle Brackets> and you will need to manually add the details.

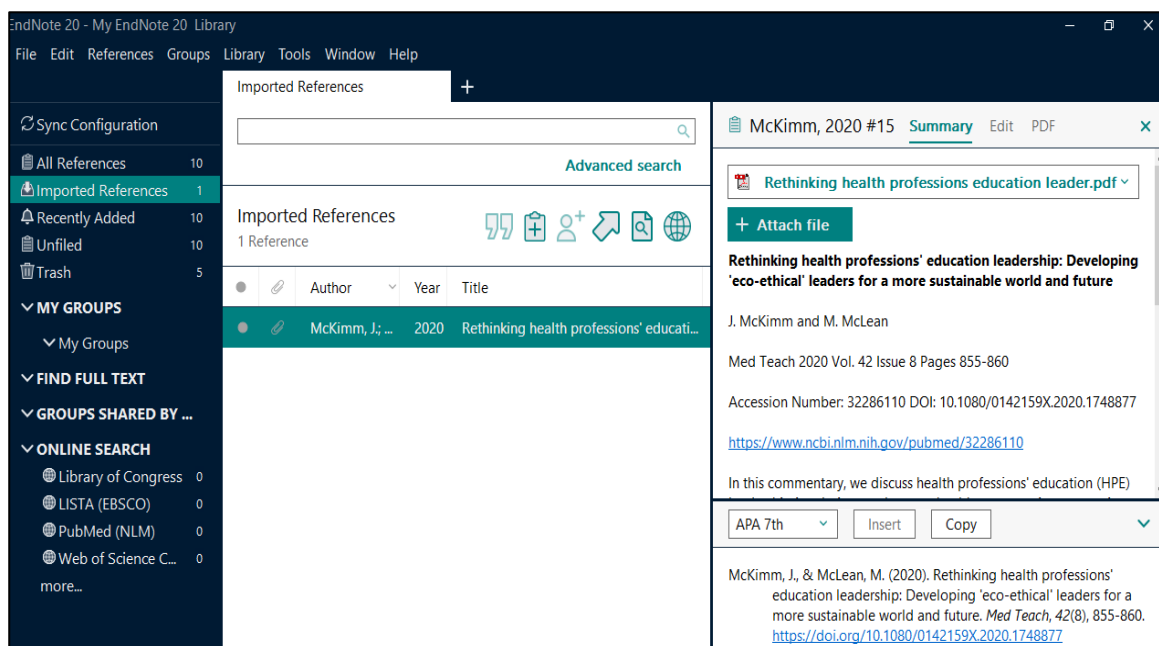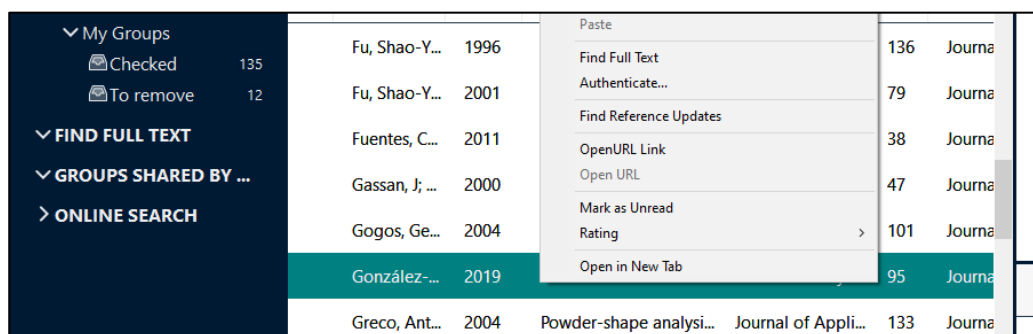## 15.3 Find Full Text Feature

Right click on one or more citations and click 'Find Full Text'.

Success rates vary depending on the age of the citation, whether the record contains a DOI, and whether the PDF is behind a subscription paywall.

You can improve Find Full Text results – add URLS (below) and 'Find Reference Updates' (15.4)

1. Add these URLs in EndNote:

Go to Edit>>Preferences>>Find full text
1. Under the Open URL Path add this URL: http://resolve.library.waikato.ac.nz/
2. Under the Authenticate with URL, add this: http://ezproxy.waikato.ac.nz/login?url=
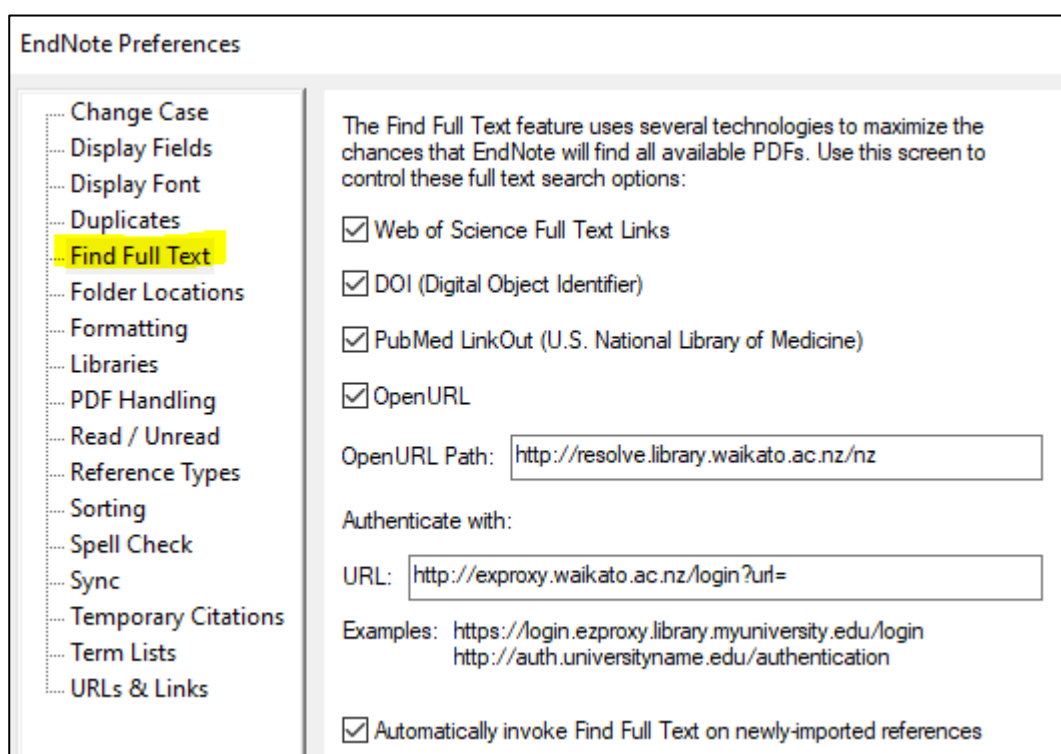

15.4 Find Reference Updates

Right click on a citation and click 'Find Reference Updates'
EndNote searches for updates to selected references. This can help make the 'Find Full Text' feature more successful. If updates are found, for each reference you can choose to update all fields OR update just the empty fields.

16 Working with EndNote and Word

Open a Word document. Ensure the EndNote toolbar is showing and that the correct referencing style is selected (click arrow next to style and '**Select Another Style'** if necessary). Make sure 'instant formatting' is **on.**
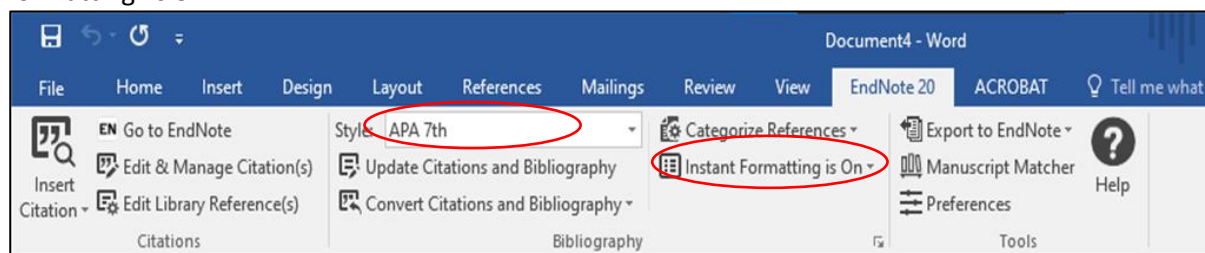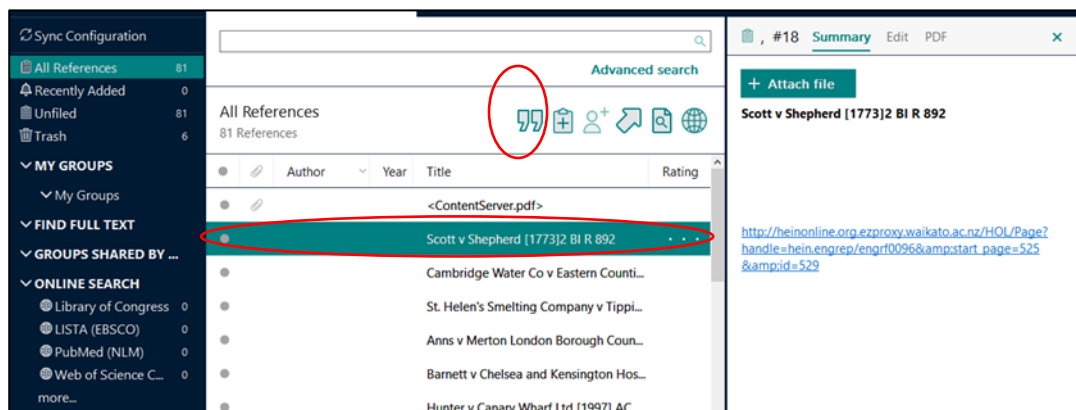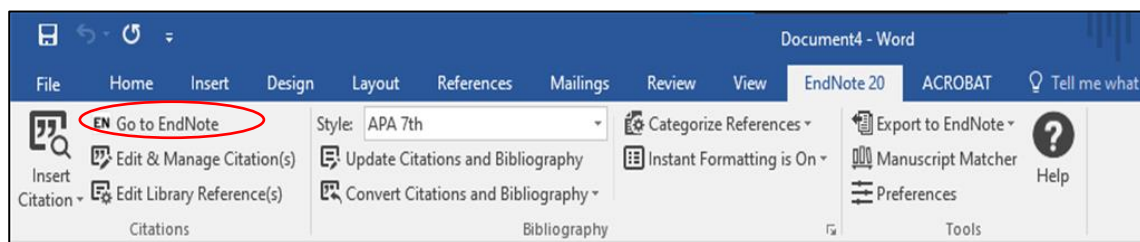

16.1 Insert Citation

There are several ways to insert citations – choose the way that best suits you.

Option a: Go to EndNote:
1. From your word document, click on the 'go to EndNote' icon in the EndNote toolbar
2. Select the relevant citation(s) from your EndNote library
3. Click on the quotation mark icon in EndNote, which will return you to you word document and insert the citation.

Option b: Insert Selected:
1. From your EndNote Library select the relevant citation/s
2. In Word click the drop down arrow next to the magnifying glass on the EndNote toolbar and from the drop down menu select **Insert Selected Citation(s)**
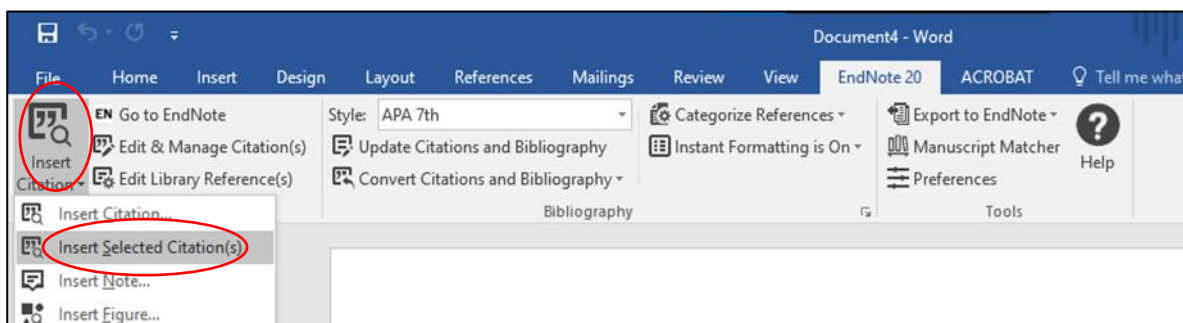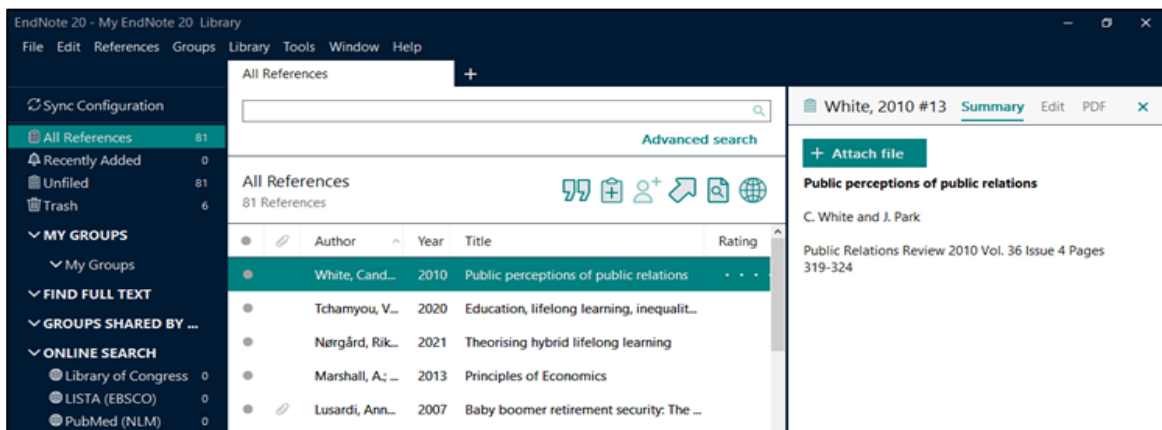
Option c: By Searching:
1. From the EndNote toolbar in Word, click on the magnifying glass icon
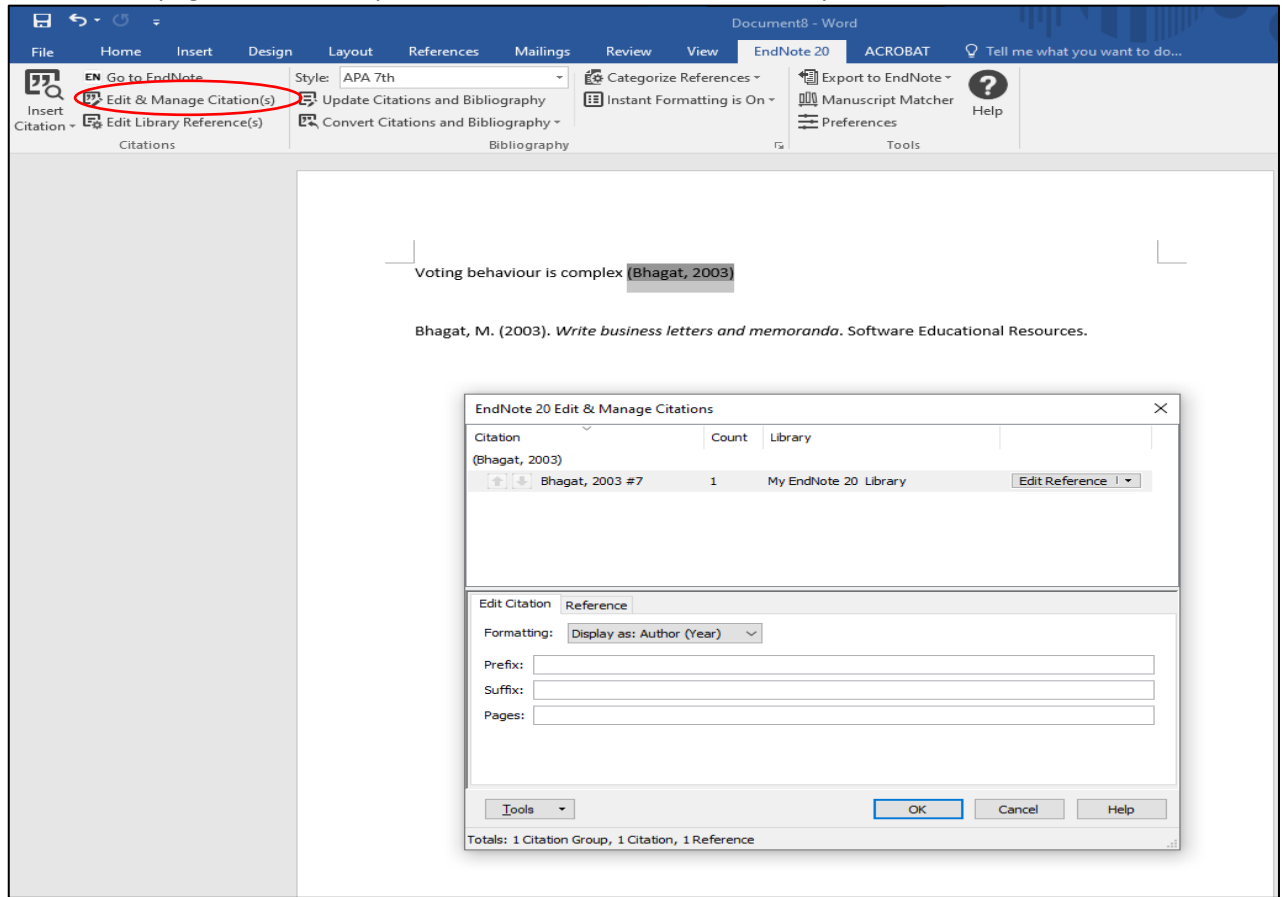2. Search for your citation, either by title or author
3. Click the citation you want and click **insert**
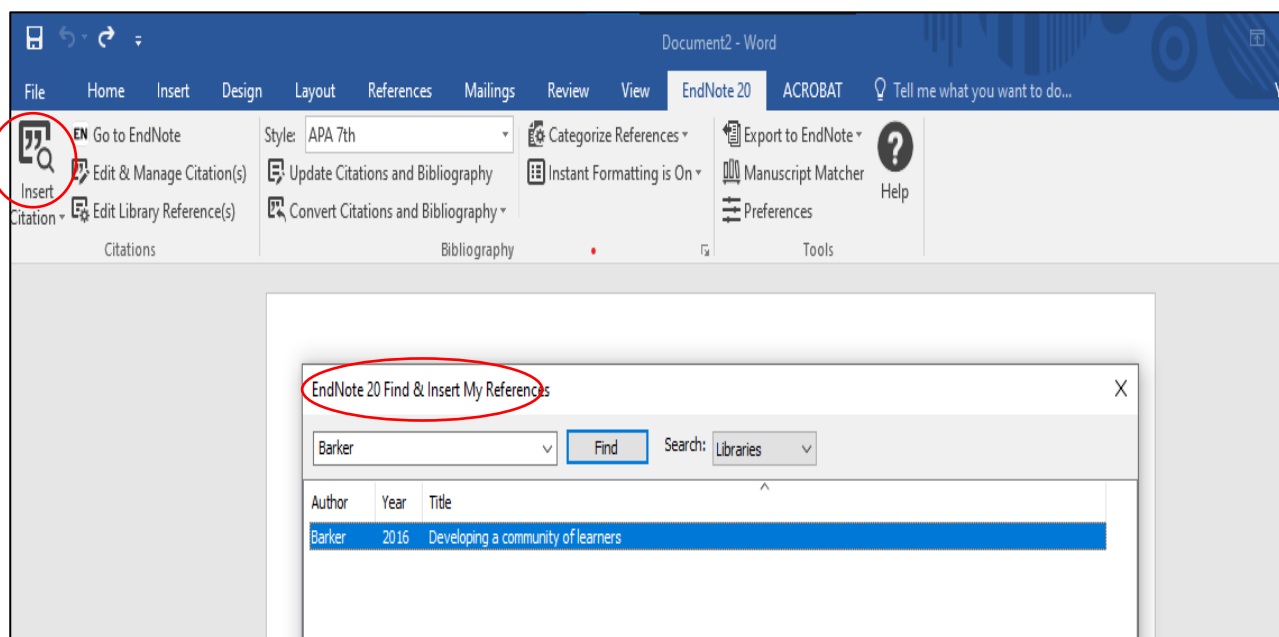
16.2 Edit and Manage Citations
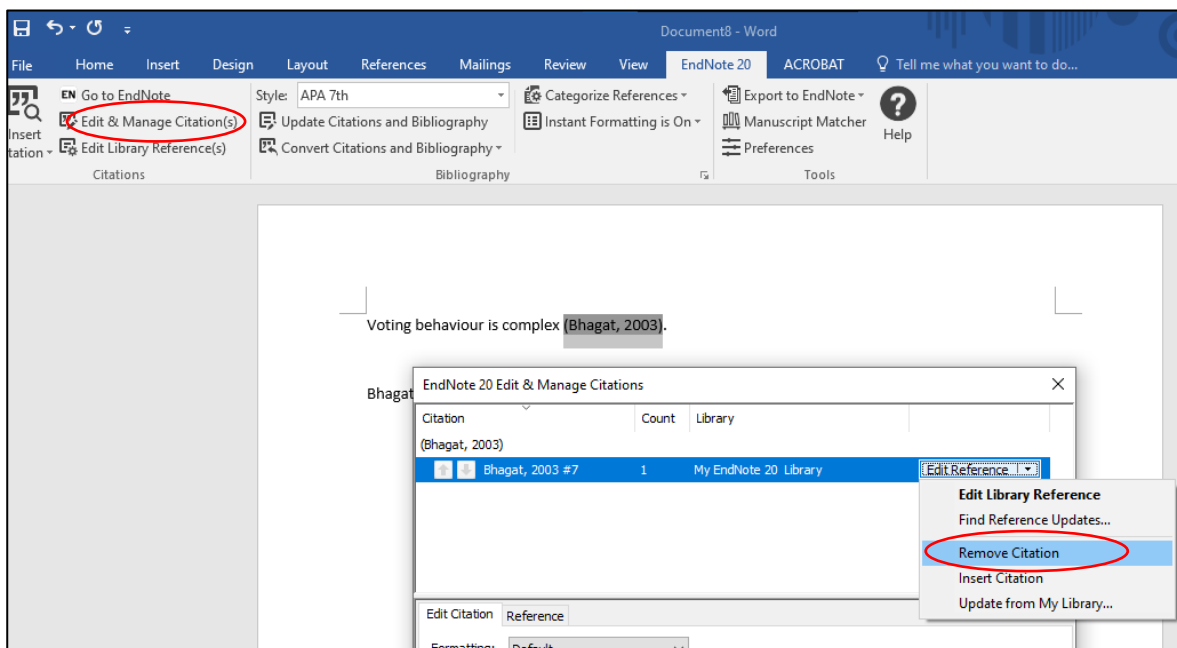
1. Click **Edit and Manage Citation(s)**.
2. You can add page numbers, or prefix information like 'as cited in' to your in text citations

16.3 Remove citation

Items added with EndNote must be removed with EndNote. To remove the citation, click on the in-text citation you wish to remove, click 'Edit & Manage Citation(s)', click 'Edit reference' dropdown, and click 'Remove Citation'

16.4 Edit your bibliography / reference list

If EndNote created your reference list, you **must** use it to change title, font, line spacing, and indentation
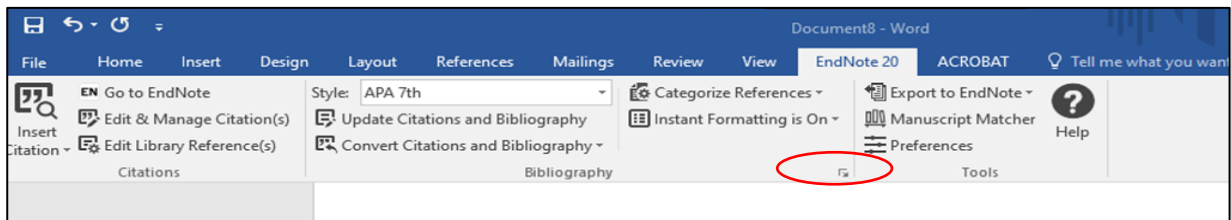
From your word document:

1. Click on the EndNote toolbar
2. Click on the arrow on the lower right corner of the **Bibliography** group
3. Select **Layout**
4. Select formatting as required

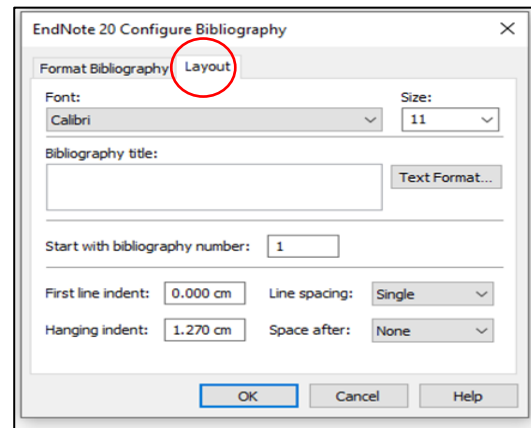## 17 How to download a University of Waikato EndNote style

Library staff have created or adapted styles for APA6th, MHRA, Harvard Science, Harvard Geography, Law, Anthropology and Politics. These adapted referencing styles are NOT automatically loaded into the EndNote program.
1. Make sure the EndNote program is open.
2. Visit the 'Styles' section of the below address
    https://www.waikato.ac.nz/library/study/guides/endnote/styles
3. Click on the relevant style.
    Once it is downloaded, click on the file to open it.
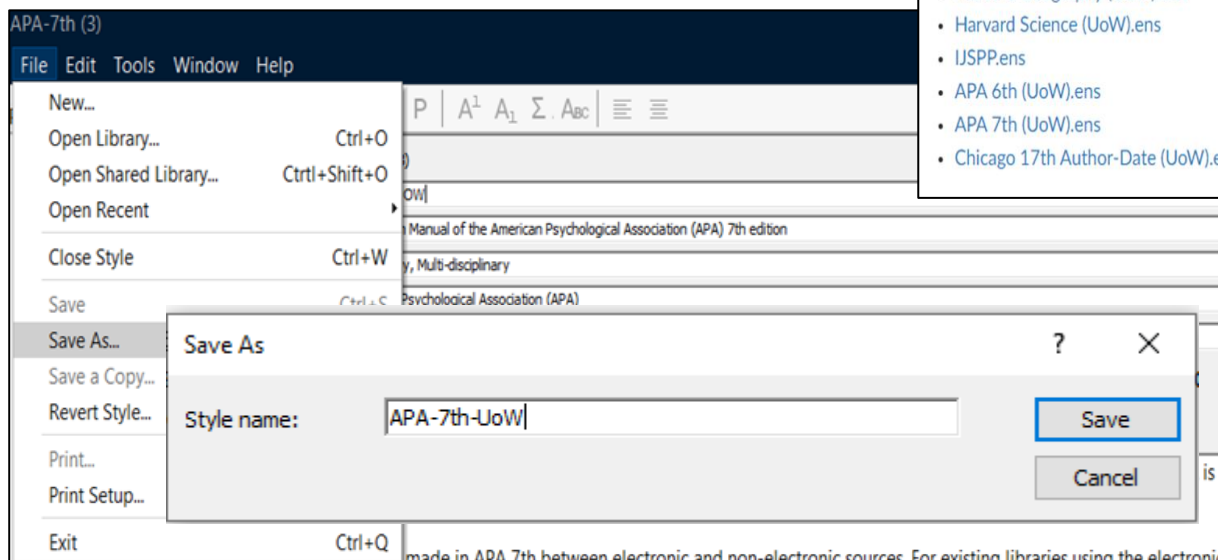
4. Once the style is open (as shown above) mouse to the top of your screen and click on 'File' and 'Save As' from the EndNote menu, remove the word copy from the Style name if it appears, and click 'Save'.

5. Close the style by clicking the small X in the upper right of the screen.

6. From your EndNote Library, click the arrow to the right of the default style and click 'select another style'
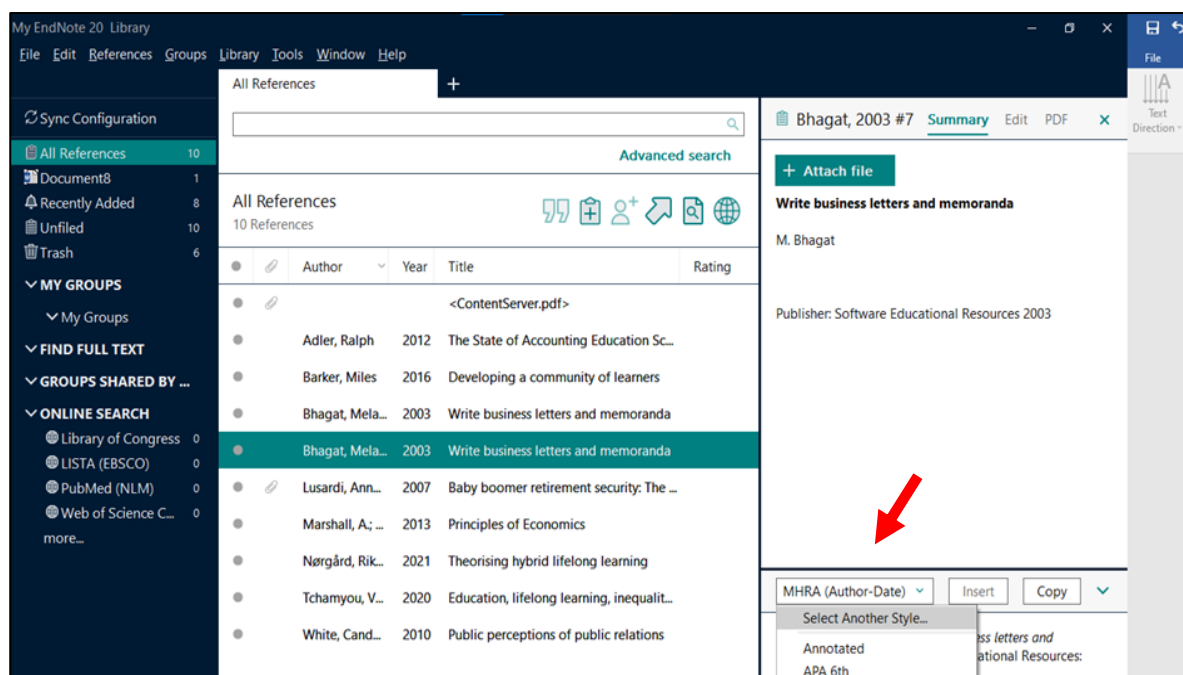
7. Find the newly downloaded style in the list of styles and select 'Choose'.

8. This style is now available on your computer, and will be available as a style to select when you start using EndNote in MS Word (see Section 15 Working with EndNote and Word).
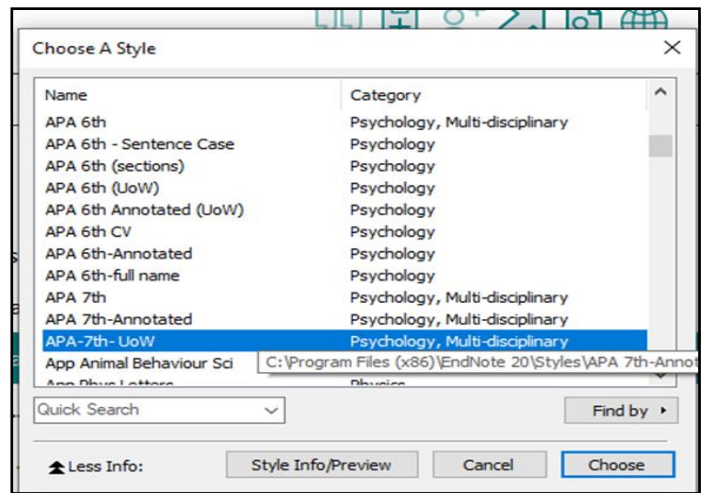
18 Backing up and disconnecting

18.1 Saving your library as a backup

It is essential to save your EndNote library as insurance in case your working library becomes corrupt, or the device containing your library is stolen or becomes corrupt.

Your library has two parts – a .enl file and a .data file. To save the Library you have to compress them which means they are saved as one file with a .enlx extension.

1. From your EndNote library, click **File** and choose 'Compressed Library (.enlx)…
2. Choose 'Create' 'with file attachments'
3. Choose a location to save your library (it's useful to create an EndNote backups folder, and also save to a USB, and you also have the option to email the compressed library)
4. When you wish to open the library in its new location double click on it and it will automatically separate into the two files and you can use it as your working library.
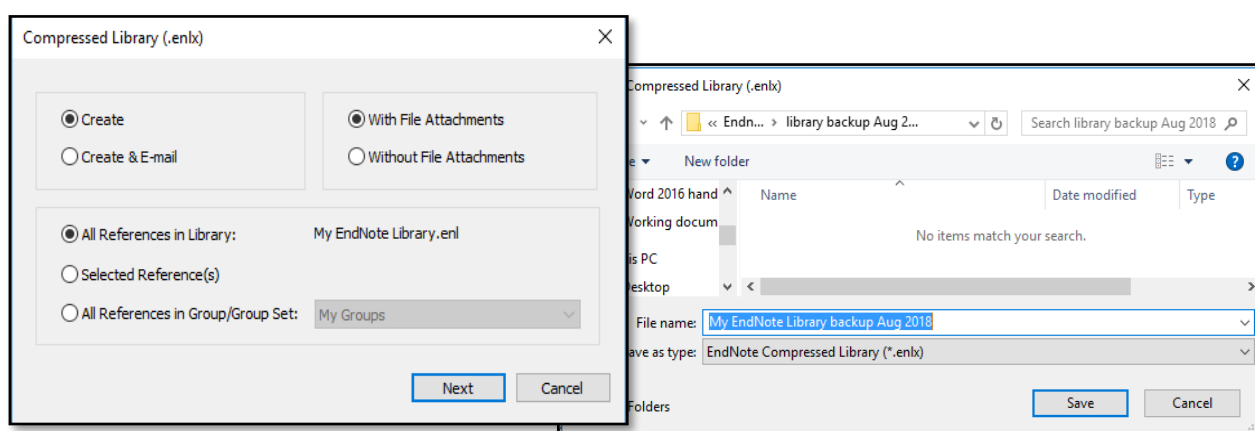
18.2 Disconnecting your document from EndNote

If you want to share your document with others who may want to edit it or use track changes, it is best to create a plain text copy which breaks the link between your Word document and the EndNote software.

1. From the EndNote toolbar in your Word document, click on **Convert citations and bibliography.**
2. Click **Convert to Plain Text.**
3. A pop up box will advise that this command will create a new copy of your Word document and removal all EndNote markers, and your original file will remain open and untouched. Click **'OK'.**
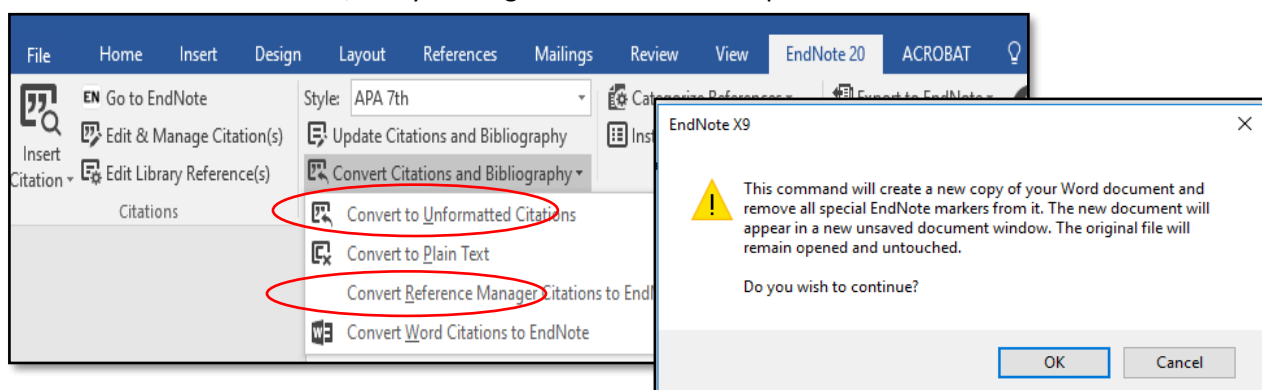
4. Save the new un-named document and add 'Plain Text' to the title. This document is not connected to EndNote, and cannot be reconnected. Your original EndNote connected document remains unchanged.