

Introduction to EndNote X9 Desktop

EndNote Desktop is a program which helps you to store, manage and search for bibliographic references in a personal database. You can attach full-text PDF articles to references. You can also take advantage of EndNote's "Cite While You Write" facility to insert citations (references) in a Word document and generate a list of references at the end of the document in a wide variety of styles.

Contents

1. Getting started.....	2
2. Adding references to an EndNote library	3
2.1 Adding references manually	3
2.2 Creating EndNote records from a collection of PDF articles	5
2.3 Exporting references direct from Discover and individual databases	6
2.4 Importing references downloaded from a database into an EndNote library	7
2.5 Searching Discover and individual databases from within EndNote	8
3. Managing your references	9
3.1 Groups.....	9
3.1.1 Creating a custom Group and adding references to it	10
3.1.2 Deleting a Group	10
3.1.3 Renaming a Group	10
3.1.4 Removing References from a Group.....	10
3.1.5 Smart Groups	11
3.2 Deleting references from your library	11
3.3 Renaming PDF files	11
3.4 Annotating PDF files.....	11
3.5 Attaching PDF articles in your EndNote library.....	12
3.6 Opening PDFs attached to references in EndNote	12
3.7 Searching for free full-text articles from within EndNote	12
3.8 Printing selected references in a specific style	13
3.9 Copying selected formatted references from your library into a Word document	13
4. Citing references in a Word document and generating a list of references.....	13
4.1 Inserting a reference(s) into a Word document	14

4.2 Editing & Managing Citation(s)	14
4.3 Changing referencing styles in Word	15
4.3.1 Using the Vancouver style in EndNote.....	15
4.3.2 Using the LJMU History (modified MHRA) style in EndNote	16
4.3.3 Splitting a reference list into categories of materials, for example: primary and secondary sources	17
4.3.4 Using a Manuscript Template to prepare a paper to submit to a journal	18
5. Combining chapters with EndNote citations into a single Word document with one reference list	18
6. Adding references from EndNote to PowerPoint slides	19
7. Making a back-up copy of your EndNote library	20
Creating a Compressed Library File	20
Restoring a Compressed Library File.....	20
8. Frequently Asked Questions	20
9. Further help	21

1. Getting started

Downloading EndNote Desktop (Windows) for home use only

Under the terms of our licence LJMU students and academic staff may download EndNote from <https://www.ljmu.ac.uk/ithelp/software-for-staff-and-students> and install it on their own PC. Users are required to remove the software when they leave LJMU.

NB: EndNote Desktop is not compatible with cloud base storage systems such as OneDrive, Dropbox or GoogleDrive. All files must be installed and saved locally on a personal device.

Downloading EndNote Desktop on a Staff PC/device

Staff can request the installation of EndNote Desktop on an LJMU devices via the Software Centre: <https://helpme.ljmu.ac.uk/#servicecatalogue> and search “software” and submit a request

Once installed you will see in Word an **EndNote** tab appears on the ribbon, to access EndNote select **Go to EndNote** in the EndNote ribbon.

NB: To use the **Direct Export** facility described later in this you may need to launch EndNote before attempting to export results from Discover or another database.

EndNote libraries

EndNote stores references in files referred to as libraries. To create a new library, select **File** and then **New**. In the **New Reference** Library dialog box, select a place on your device and enter a

filename if you do not wish to give your library the default name 'My EndNote Library' and then **Save**. In addition to the above library file EndNote will create an accompanying folder, for example: My EndNote Library.data.

To open an existing EndNote library, start EndNote and then select **File** and then **Open** and select the appropriate library.

Create just one EndNote library rather than several. If you are collecting references on a range of topics for different assignments/projects or documents, remember that you can easily assign references within a library to one or more groups to make things easier to manage.

Work with just one Word document open at once.

The EndNote toolbar



Move the mouse cursor along the toolbar to discover the function of each button.

NB. To change the layout of the library on the screen select the **Layout** icon in the bottom right hand corner of the EndNote window.

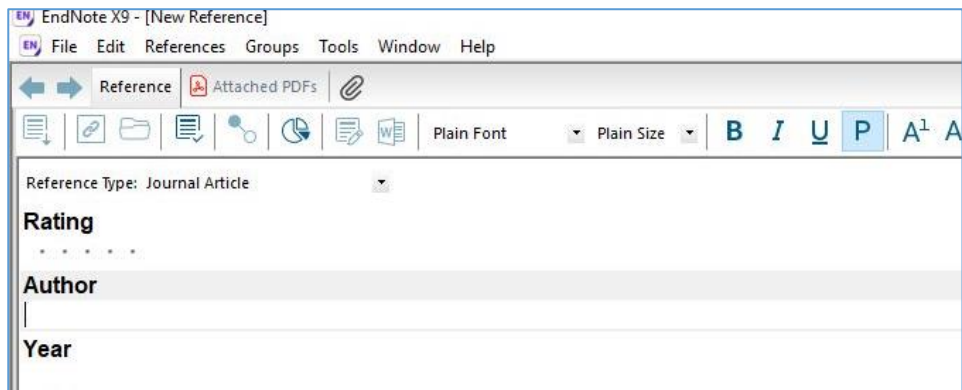
2. Adding references to an EndNote library

- There are several ways to add references to an EndNote library:
- Adding references manually
- Creating EndNote records from a collection of PDF articles
- Exporting references direct from Discover and individual databases
- Importing references downloaded from a database into an EndNote library
- Searching Discover and individual databases from within EndNote

In each case the first step is to open the library. From the **File** menu choose **Open** and then **Open Library**. Select the appropriate library and then on **Open**.

2.1 Adding references manually

Select **New** on the **References** menu or  on the EndNote toolbar



EndNote provides input templates for references to over 40 types of material. Journal Article is the default reference type. Select the **Reference Type** drop-down menu to select another reference type, if necessary. If you change the reference type, select in the **Author** field of the selected template before you start typing details.

NB. Choose **Electronic Article** rather than Journal Article, if you wish to include a URL in the reference and want it to appear in a reference in your Word document. **Book section** reference type is the one to choose if you wish to create a reference to a chapter in a book.

Author names

- Type in either first middle last or last, first middle order, for example: John Edward Smith or Smith, John Edward. If you enter last name first include a **comma** between the author's last name and initials or last name and first names. EndNote will reduce full first names to initials, if the style you choose for your reference list requires it. As you type, EndNote will suggest names already in your library which are similar to the one you are entering. To accept a suggested name, press the **Tab** key. If you are entering a new name, keep typing until you have completed the name and then press **Enter**. New authors' names appear in red until the reference has been saved.
- If an item has more than one author, press **Enter** when you have entered the first name and enter the second name on a second line in the author name field. Omit the word and between the names or et al. after the last name.
- If the item has a corporate author, for example: Department of Health, add a **comma** after the name of the organisation, for example: Department of Health, This will ensure that the organisation's name is displayed correctly.
- Press the **Tab** key or select in the next field to move through the reference.
- Enter all details in **plain text**, for example: omit brackets, extra punctuation, bold, italics or underlining. EndNote adds these automatically where necessary when it generates a reference list in the style you select.
- To avoid gaps within a reference, take care not to include any unnecessary spaces as you type in details.
- If you are creating a reference to an electronic article or an electronic book and intend to use the Harvard LJMU style, enter the date on which you accessed the article in the Date Accessed field. If the item is a web page or a document from a web page, enter the date

on which you accessed it in the Access Date field.

- Close the reference window when you have entered all the relevant details and confirm that you wish to save it.
- To insert accented or other non-standard characters in a reference, use the Windows Character Map program. This is available via Start, All Programs, Accessories, System Tools, Character Map. Select the character you need, copy and paste it into the relevant location in the reference.
- To amend a reference, double select the entry in the library window to open it. Make the necessary changes, close the reference window and select **Yes** to save the changes.
- To preview a reference in a particular style, select it and then select the **Preview** tab in the bottom left hand corner of the window in which the open library is displayed. To change the style, choose a new one from the drop-down menu to the left of the EndNote toolbar.

2.2 Creating EndNote records from a collection of PDF articles

If you already have a collection of journal articles in PDF files, EndNote may be able to create records for them automatically. This only works with PDFs created recently by publishers who embed bibliographic data (typically a DOI) in the documents.

- Place all the PDFs in one folder
- Open your Endnote library
- Select **File**
- Select **Import**
- Select **Folder**
- **Import Options > PDF** should already be selected; if not, use the dropdown menu to select **PDF** or **Folder**
- Check the **Duplicates** option and select your preference
- Select **Choose**
- Navigate to the folder containing your PDFs and select it
- Select **OK**
- Select **Import**

A copy of any PDFs with embedded DOI data will be imported to new records with matching bibliographic data. You may need to edit the journal title and article title fields so that they match the style that you wish to use.

PDFs without embedded DOI data will be added to individual default journal article records and the file name of the PDF will be displayed in the title field of the record. Select the PDF and **Quick Edit** tab in the bottom pane to enter details of the items in their records manually.

Importing new PDFs into EndNote automatically

You can create or choose a folder into which you will deposit copies of new PDFs of articles. To set EndNote to check the folder regularly go to Edit, Preferences, PDF Handling, Enable automatic importing and select the folder. EndNote will then scan the new PDFs in this folder, create a record and attach a copy of the PDF whenever possible. Once imported, PDFs are moved to an imported sub-folder within the folder you have selected.

2.3 Exporting references direct from Discover and individual databases

Discover and many individual databases offer a “Direct Export” option which allows you to search within the database, select references and then transfer them to your EndNote library in a matter of seconds.

You must have created an EndNote library before attempting to export references from a database.

Typically, the export process involves selecting the references in your search result by ticking boxes next to the title or adding them to your folder then selecting an export button. **EndNote** or **RIS** as the format for the references.

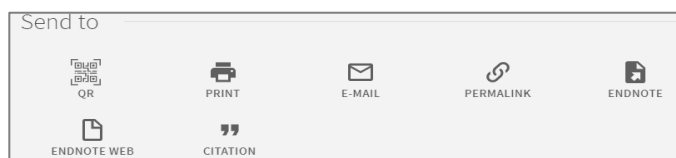
If you have your EndNote library open, the exported references will be added to that library. If EndNote is not open, it will be launched and your library will be opened, the references added to it. If you have more than one EndNote library, you will be prompted to choose the library you want the references to be added to.

If an Open or Save option appears after you select to direct export references from a database, select **Open** to launch EndNote.

If you are asked to select a filter after selecting Direct Export, choose RefMan RIS.

Exporting search results from Discover

To export an individual search result, select the **Title** to open the item record. A range of options will appear underneath **Send To**:






- Select **EndNote** and then select **Download**
- You will then be prompted to save the record
- The next step differs depending on the web browser you are using:

Internet Explorer: a toolbar will appear at the bottom of the screen asking if you wish to save the EndNote RIS export record, select **Save** and when prompted, choose **Open**

Chrome: an export option will appear at the bottom of the screen, select the ^ arrow to open the File Menu and choose **Open**



- This will open your EndNote Library and the full record will be imported from Discover
- To export a batch of references, select  next to each of results you wish to export to add them to your Favourites list
- Select  at the top of the screen to open your **My Favourites** list.
- Select the checkboxes to select all items on the list which you would like to export

NB. Titles in some references you export may be all in capitals. To correct this once you have the reference in your library, open it, select the contents of the title field, select the **Change case** button  on the toolbar and choose the option you need.

2.4 Importing references downloaded from a database into an EndNote library

If the database you are searching does not offer the Direct Export option, you can probably download the references you want to a .txt file and import them into your library through one of the filters which EndNote includes. References must be saved in plain text files in layouts which EndNote's filters can recognise.

General notes about downloading

As you select a filter from the list of databases within EndNote, notes on the format to choose when downloading and any changes you might need to make to records after downloading are often displayed in the Comments box at the bottom of the list display.

Please note that downloaded references must be saved in plain text files. Some services may download references into a file with the extension **.dat** or **.ris** rather than **.txt**. EndNote can also handle these formats.

If a downloaded reference to a journal article includes a URL which you want to appear in the reference when you use it in a Word document, open the reference in EndNote and change the reference type from Journal Article to Electronic Article.

Immediately after a batch of references has been imported, only the newly imported references are displayed in the Library window. A group named **Imported References** appears in the list of groups. To display all the references in a library, select **All References** on the groups list.

NB It is possible to import references from different databases into a single EndNote library provided that each set of references is imported through the appropriate filter.

2.5 Searching Discover and individual databases from within EndNote

EndNote provides a collection of connection files which allow you to connect to certain databases to perform simple searches for references and add them to an EndNote library. You can use this feature to search PubMed and a number of American and British university library catalogues. To see the full list of available Connection files, select **more** at the bottom of the list under the **Online search** heading on the EndNote screen. Although the full list of files includes Connection files for many of the databases to which LJMU subscribes, many of these are only compatible with the American versions of the databases and not with those available in the UK.

The following instructions describe how to search online in **integrated library and online search mode**, for example: with the third button on the toolbar in EndNote selected

To retrieve details of books from **Discover**:

- Select **more** under the **Online search** heading. Select **Liverpool JMU Discover** from the list of connection files and select **Choose**. EndNote will then open a Search “Liverpool JMU Discover” window and connect you to Discover.
- Type your **search term(s)** into the box
- If the set of results is too big, refine the search by adding another term or limiting it to word(s) in titles
- To add another term to a search, select **Cancel** to return to the Search tab
- Set the Boolean operator at the beginning of the second search line to **And**
- In the second search line type in another search term and select **Search**
- Change the number in the second box, if you do not wish to download all the references found
- Select **OK** to retrieve and save the results of your search

The references are downloaded into your library and appear both in the All References group and in a temporary group for the Liverpool JMU Discover database connection. You can halt the retrieval process at any time by selecting the **Cancel** button on the **Search** tab. Records that have been processed up to that point will have been added to your library.

You can connect to individual databases. For example, to connect to **PubMed**:

- Select **PubMed (NLM)** from the list of services under the **Online Search** heading. EndNote will then open a Search “PubMed Medline at PubMed (NLM)” window. No username or password is required for PubMed.
- Type your **search term(s)** into the box
- If you need to refine a search, add another term or limit the search to article titles or MeSH headings
- To add another search term, select **Cancel** to return to the Search tab
- Set the Boolean operator at the beginning of the second search line to **And**

- In the second search line, select **Any Field** from the field list and type in another search term and select **Search**
- If you want to accept fewer than all the results of a search, change the number in the second box
- Select **OK** to retrieve and save the matching references

The downloaded references appear in the **All References** group and in a temporary group for the PubMed database connection. Select the **Cancel** button on the **Search** tab to stop the retrieval process at any time, records processed up to that point already exist in the library. Closing your EndNote library resets the temporary PubMed (NLM) group to zero.

Reviewing your search results

Look through the references retrieved from Discover or an individual database and decide which ones you want to keep. You could open each reference individually to scan its details. Alternatively, you can use the **Preview** tab as follows:

- Select a **reference** in the reference list
- In the **Tab** pane, select the **Preview** tab to display a reference preview
- On the toolbar, select the **Show All Fields** output style from the output style list so that all the information in the references is displayed
- On the **Preview** tab, you can scroll through the data in the selected reference
- Please note that journal titles can be abbreviated in references from certain databases so you will need to amend this and enter in the **full title**
- If the reference includes a URL which you want to appear in the reference when you use it in a Word document, open a reference and change the reference type from Journal Article to **Electronic Article**

3. Managing your references

3.1 Groups

As your EndNote library grows, finding an individual reference can become increasingly difficult. Rather than creating a separate library of references for each topic you are writing on, it is usually more convenient to create a number of groups within a single library and assign references to one or more of these. The left pane of the library window lists groups of saved references. In a new library, only the All References group contains references, and displays all of the references in the library. You can add up to 500 custom and smart groups to a library.

You create a custom group by specifically adding individual references to the group. To create a smart group, you first set up a search strategy. EndNote then uses this to add new references to appropriate group(s) as they are added to the library.

Many of the commands for managing groups are accessible via both the **Groups** menu and the right select menu.

3.1.1 Creating a custom Group and adding references to it

- From the **Groups** menu, select **Create Group**
- In the Groups pane of the Library window, **New Group** is now highlighted for editing
- Type a **name** for the group and then press **Enter** or select in the reference list area to save the change. The reference list is blank, as there are no references in this new group.
- Select the **All References** group to display the entire library again
- **Highlight** the references you wish to add to the new group
- Drag the highlighted references to the new group or go to the **Groups** menu and choose **Add References To** and select the group you want to move the references to
- Select the group to display the references now included in that Group

3.1.2 Deleting a Group

- Right select the group name and select **Delete Group** or select the group name and then select **Delete Group** from the **Groups** menu
- Select **Delete** and only that Group is deleted; the references it contained are not deleted from your library

3.1.3 Renaming a Group

There are several ways to rename a custom group or a smart group:

- In the left pane of the library window, select the name of the group.
- Select the **Rename Group** command in one of these ways:
 - Select the group name a second time to directly edit the name.
 - From the **Groups** menu, select **Rename Group**
 - Right select the group name and select **Rename Group**

NB The following groups are created automatically by EndNote and you cannot change their names: All References, Duplicate References, Full Text, Imported References, Search Results, and Trash.

3.1.4 Removing References from a Group

To remove a reference from a group:

- Select the **group name** in the left hand pane to display its contents
- Select the reference(s) you wish to delete and then press **Delete**
- Confirm that you wish to delete the selected reference(s) from the group

3.1.5 Smart Groups

Smart groups are built with search strategies and are updated automatically as you add references and edit references in the library.

Creating a Smart Group

- From the **Groups** menu, select **Create Smart Group**
- Enter your search strategy, and select **Create** to create a **New Smart Group**
- From the **Groups** menu, choose **Rename Group** and type in a name for the group

Editing a Smart Group

If you need to refine the search strategy for a smart group after you have set it up:

- Highlight the name of the smart group in the Groups pane.
- From the **Groups** menu, select **Edit Group** to display the smart group search dialog and the current search strategy is displayed.
- Make the required changes to the search strategy and select **Save** and then the smart group is updated

3.2 Deleting references from your library


To delete references from your library, display **All References** and select the reference(s) you wish to delete. Choose **Move References to Trash** from the **References** menu. If you do not empty the Trash, by choosing **Empty Trash** from the bottom of the **References** menu, before closing EndNote, the program will ask whether you wish to empty all records from the Trash.


To restore records in the Trash to your library, display the Trash group, select the references you wish to restore and drag them over to the All References group.

3.3 Renaming PDF files

PDFs often have long filenames which give no indication of the article's title or other details. EndNote offers a choice of 6 options for renaming imported PDFs to a set format. This facility is available via **References, File Attachments, Rename PDFs**. It is also possible to rename a PDF which is already attached to a record at any time.

3.4 Annotating PDF files


To highlight text or to attach a note to a PDF attached to an EndNote record, select  on the toolbar above the PDF article display.


To add sticky notes or highlight text select  on the PDF reader toolbar. To hide sticky notes and text highlighting on a PDF, right select the text of the open PDF and select **Hide Notes/Markup** from the menu. To restore them select **Show Notes/Markup** from the menu.

3.5 Attaching PDF articles in your EndNote library

It is possible to store PDF articles and other documents within your EndNote library as well as their bibliographic details. To attach a PDF file to a reference, highlight the reference and select the **paperclip** and browse to find the file. The PDF files are stored in the PDF sub-folder within the .data folder which accompanies your EndNote library.

3.6 Opening PDFs attached to references in EndNote


To open a PDF file which is attached to a reference, select the reference and then select  on the EndNote toolbar. This opens Adobe Reader which displays the PDF.

To open a hyperlink which is attached to a reference, select the reference and then select  on the EndNote toolbar.

PDFs attached to EndNote records can also be viewed via the PDF and Quick Edit tab in the bottom pane of the EndNote window.

3.7 Searching for free full-text articles from within EndNote

Some journal articles are freely available from websites. To check whether any of those recorded in your library fall into this category

- Select the reference(s) within your EndNote library.
- Select 
- Select **Continue/OK** if a warning message about Copyright relating to downloading full text articles appears.
- The progress and results of the search are displayed on a line below the **Preview/Search** pane.
- If EndNote finds a free version of the full text of the article in PDF, it will attach a copy of the file to the **File Attachments field** within the appropriate reference in your EndNote library
- If EndNote finds an article which is freely available in HTML, it will add a hyperlink to the article to the **URL field** within the appropriate reference

This facility does not always pick up articles available to members of LJMU through paid subscriptions.

A paper clip icon to the far left of a brief entry in your library indicates that a PDF file is attached to that reference. You may attach more than one hyperlink or PDF to a reference.

3.8 Printing selected references in a specific style

Choose **Open** on the **File** menu and select the appropriate EndNote Library.

Depending on the size of the library either:

- Select the **Search** tab next to the **Preview** tab towards the bottom of the screen
- Type your search term(s) in the search box(es)
- Select the **Search** button to perform the search

OR:

- Select the references you wish to print in the Library window
- Choose **Show Selected References** from the **References** menu and **Sort the References**, if necessary

Select a style for the printout from the **Style** drop-down menu in the EndNote toolbar. To see the full list of available styles, choose the **Select another style** option. Highlight the style you want and select **Choose** to select a new style.

Choose **Print** from the **File** menu

3.9 Copying selected formatted references from your library into a Word document

This facility is useful if you need to add references formatted in a particular style to a Word document which you have written without using EndNote's "Cite While You Write" facility.

- In the Library window select the references you wish to copy into your Word document
- Choose **Show Selected References** from the **References** menu and **Sort the References**, if necessary
- Select a style from the **Style** drop-down menu in the EndNote toolbar. To see the full list of available styles, choose the **Select another style** option. Highlight the style you want and select **Choose** to select a new style
- Choose **Copy Formatted** from the **Edit** menu in EndNote
- Go to Word and paste the formatted references into the document at the appropriate point

4. Citing references in a Word document and generating a list of references

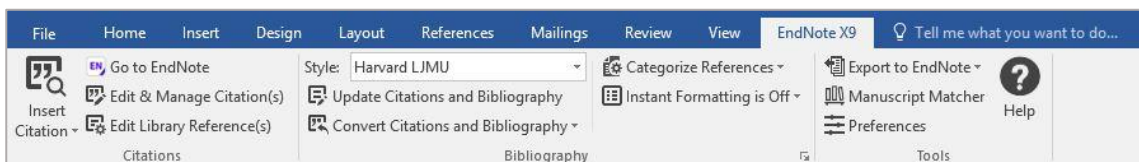
EndNote has a "Cite While You Write" feature which allows you to incorporate references from your EndNote library in a Word document as you write it.



Before you start writing a document in Word and adding references via "Cite While You Write", it is worth checking your library for duplicate references and deleting any that you find.

To do this, select **References, Find Duplicates** within EndNote. If EndNote finds duplicate references it will open them so that you can check them and choose the one which you wish to keep.

4.1 Inserting a reference(s) into a Word document

- Check that **Instant Formatting** is on:



- Place the cursor at the point in the text where the reference should appear
- Select the **EndNote** tab within Word
- Select **Go to EndNote**
- Select the **reference** in your EndNote library
- Select **Insert Citation** , it may take a while for the selected reference to appear in your Word document
- Each time you insert a reference an appropriate brief citation appears in the text and a full reference is added to the reference list at the end of the document
- To insert several references at the same point in a document, select the references in your EndNote Library and select **Insert Citation** 

4.2 Editing & Managing Citation(s)

- If the author's name or the year of publication already appears in the sentence, you can hide it in the citation by highlighting the citation in the Word document.

Select the **Edit & Manage Citation(s)** under the EndNote tab in Word and choose the appropriate formatting option(s). Select **OK** to implement the change(s) to the citation

The image shows the 'Edit Citation' dialog box with the 'Reference' tab selected. The 'Formatting' dropdown menu is set to 'Display as: Author (Year)'. Below this are three empty text input fields labeled 'Prefix:', 'Suffix:', and 'Pages:'.

- To add a page number to a citation, highlight the citation in the Word document, select **Edit & Manage Citation(s)** and enter the **page number(s)** in the **Suffix** field **NOT** the Pages field. Include any spaces or punctuation which you wish to appear between the year and the page number(s), for example: p.123. Select **OK**

- To remove a citation from a document, highlight it, select **Edit & Manage Citation(s)**. The reference you have highlighted in your Word document will be highlighted in blue in the **EndNote Edit & Manage Citations** dialog box. Select the **Edit Reference** drop-down menu and select **Remove Citation**. This ensures that the citation is removed cleanly from your text and from the list of references at the end of the document unless you have referred to it elsewhere in the document.
- To indicate a secondary reference, enter brief details of the item cited in the **Prefix** box so that they appear in front of the standard reference in your text. Include a note of the relevant page in the **Suffix** box.

4.3 Changing referencing styles in Word

At LJMU the primary referencing style used is Harvard. Harvard LJMU is included in the collection of styles available within EndNote. However, some faculties may occasionally require that you use a different style.

To change the style of the references in your Word document, you can choose a new style from the **Style** drop-down menu. If necessary, you can change the font and/or size of the text in your reference list to match the font and/or size of the text in the body of your essay. To do this:

- In Style area select the down arrow in the bottom right corner
- Select the **Layout** tab and select the appropriate font and sizes
- Select **OK** to apply changes made

There are also options under the Layout tab to add a title to a reference list, change line spacing within and between entries on the list and change the depth of the indent for the second and subsequent lines within entries.

4.3.1 Using the Vancouver style in EndNote

In this style journal titles are abbreviated in accordance with a standard list used in **Medline**. These abbreviations are contained in a so-called medical journals term list supplied with EndNote.

If you are importing the medical journals term list into an EndNote library which already contains references, you will need to first delete the existing terms in your library's journals term list. To do this:

- Open your EndNote library
- Select **Tools** on the menu bar
- Select **Open Term Lists** and then select **Journals**
- Select anywhere in the window where the journal titles are displayed and press **Ctrl+A** to select all terms
- Select the **Delete Term** button to delete all the terms
- Close the **Term Lists** dialog box.

Importing the Medical Journals term list

- From the **Tools** menu, choose **Define Term List**
- Select **Journals** terms list, then select **Import List**

- Select the **Medical list** and select **Open**
- Select **OK**
- Close the **Term Lists** window

Modifying the Vancouver output style

The next step is to modify the Vancouver output style so that it uses the abbreviated journal title when formatting your reference list

- From the **Edit** menu in EndNote, select **Output Styles**, and **Edit “Vancouver”**
- Highlight **Journal Names** in the column on the left
- Select in the **Abbreviation 2** check box on the right
- Close the Vancouver style window and save the style with a new name, for example: Vancouver abbreviated titles:

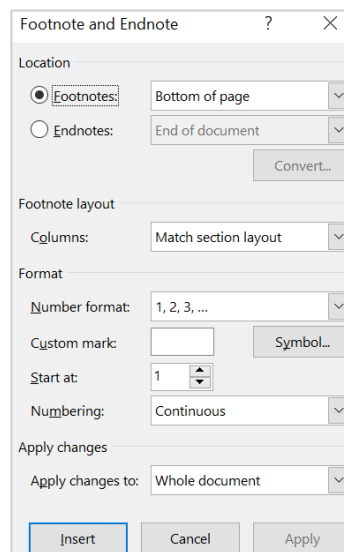
4.3.2 Using the LJMU History (modified MHRA) style in EndNote

Inserting footnotes




- Open your Word document and your EndNote library
- Select **LJMU History** as the style within EndNote and on the EndNote ribbon in Word
- On the **References** tab in Word, select the arrow within the **Footnotes** group



- Make the following selections and select **Apply**, if Apply is greyed out, select **Cancel**



- Place the cursor within the text where you wish to enter the citation

- Go into your EndNote Library and highlight the reference you wish to cite
- Go back to your Word document and select  in the Footnotes group on the **References** tab in Word to create a footnote in your Word document
- With your cursor still in the footnote, go to EndNote and select  to insert the reference
- When you start writing a new document, the bibliography may appear above the footnotes on the first page of the Word document, but it should move down the page and towards the end of the document as your writing progresses and the document grows longer. You may need to select  in Word to reformat your document so that the bibliography appears at the end.

NB If you insert a new footnote in the text between two existing ones they will automatically be renumbered in the order in which they appear in the text.

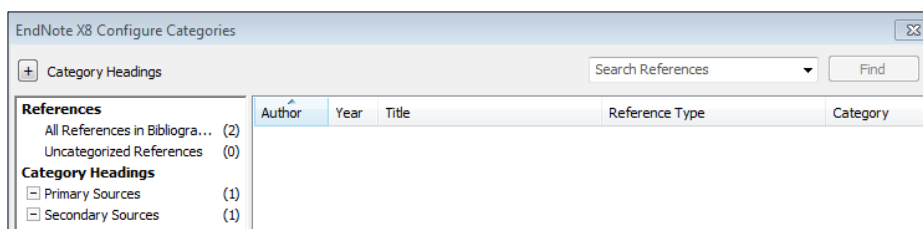
Managing footnotes

- To delete a footnote, highlight the reference in the footnote at the bottom of the page and delete it via the **Remove Citation** option under **Edit and Manage Citation(s)** in the Citations group. Highlight the footnote in the text and press the **Delete** key.
- To add a page number to a footnote, highlight the reference in the footnote and select **Edit and Manage Citation(s)** in the Citations group and enter the page number in the Pages box
- To create a secondary reference select the **footnote** of the reference you wish to amend and select **Edit & Manage Citation(s)** and enter details of the item quoted in the **Prefix** box and also the relevant **page number** in the **Pages** box and select **OK**

4.3.3 Splitting a reference list into categories of materials, for example: primary and secondary sources

To assign references to categories, for example: primary or secondary sources, to produce a reference list which is split into sections:

- Select **Categorize References** drop-down menu in Word and select **Configure Categories**
- Select the reference(s) in the list on the right and **drag and drop** them on the appropriate category and select **OK**
- Select again on **Categorize References** and select **Group References by Custom Categories**
- To add another category, select **Categorize references, Configure categories** and then on the + next to **Category Headings**
- Type the name of the new category in the empty box which appears at the bottom of the list of category headings:



4.3.4 Using a Manuscript Template to prepare a paper to submit to a journal

EndNote includes over 180 manuscript templates which make it easy to prepare papers for electronic submission to journals. When you use one of these templates, many aspects of formatting are already set up for your target publication, such as correct margins, headings, pagination, line spacing, title page, abstract page, graphics placement, and font type and size.

- Select **Tools** and select **Manuscript Templates**
- Select the template for the journal concerned (all these files have a .dot file extension) and select **Open**. If the journal to which you wish to submit a paper does not appear on the list, check the publisher's website for instructions for authors. The journal may share a style with a journal which appears on the list
- Select **Enable this content**
- Fill in the appropriate details, for example: title of article, name(s) of author(s), affiliation
- There will be a list of sections required by the journal which you need to fill in
- Each time you insert a reference from your EndNote library in the text, it is formatted automatically in the style used in the chosen journal and "Cite While You Write" formats it and adds it to the reference list at the appropriate point in the paper

A journal publisher may ask you to remove Cite While You Write field codes before you submit. Removing field codes deletes Word's Cite While You Write field codes and saves the formatted citations and reference list as text.

To remove field codes and save the formatted citations and reference list as text:

- Open your Word document and on the EndNote tab, select Convert to Plain Text from the **Convert Citations and Bibliography** drop-down menu
- You will be prompted to continue and create a copy of the document without field codes
- Select the **File** menu and then **Save As** to save this new document

NB. The copy does not contain Cite While You Write field codes, so you cannot reformat it with Cite While You Write. If you need to reformat your document, work on the original document, which retains field codes.

5. Combining chapters with EndNote citations into a single Word document with one reference list

- Make copies of all the documents containing your individual chapters, for example: 1chaptercopy.docx, 2chaptercopy.docx, etc. Work with these copies so that if you hit a

problem you can return to the original documents.

- Open your first chapter copy document for example: 1chaptercopy.docx in Word. This will become the master copy of a new document which will eventually contain all the chapters.
- On the Endnote ribbon in Word, select **Convert Citations and Bibliography** and select the **“Convert to Unformatted Citations”** option. Your citations will now appear in their unformatted state, for example: {Baker, 2007 #22}, and the reference list at the end of your document will disappear.
- Open your second chapter copy document for example: 2chaptercopy.docx in Word and unformat the citations as above. Select and copy the entire text of the second chapter copy document and paste it into the end of your first chapter copy document. Repeat the above steps with your remaining chapters until you have copied them all in sequence.
- You may now wish to rename your 1chaptercopy.docx as for example: mastercopy.docx
- Open your Endnote library, if you have not already done so. You now need to reformat the citations in your mastercopy.docx. Check that the style in which you want your references displayed is selected in both EndNote and Word.
- On the Endnote toolbar in Word select **“Update Citations and Bibliography”**. EndNote will scan the new document for citations and generate a single, new reference list at the end of the document.
- If it encounters any mismatches between author name and reference numbers in your document and EndNote library, EndNote will prompt you to specify which item you wish to cite.

6. Adding references from EndNote to PowerPoint slides

An EndNote tab appears on the PowerPoint ribbon which allows you to add citations and references to slides in a PowerPoint presentation:

- Open your PowerPoint presentation and select **Go to EndNote** under the EndNote tab on the PowerPoint ribbon and open your EndNote library
- Select the required style in **EndNote**
- Select a PowerPoint slide where you wish to add a citation
- Select the required reference(s) in EndNote and select **Insert Selected Citation(s)** on the PowerPoint ribbon to insert citation(s) on slides as required
- To add complete references to the last slide:
 - Select the last slide in your presentation
 - Select the required reference(s) in EndNote and select **Insert Selected Reference(s)** on the PowerPoint ribbon

7. Making a back-up copy of your EndNote library

It is a good idea to make a back-up copy of your EndNote library regularly. A compressed library file saves your **MyEndNoteLibrary.enl** file, its associated **.DATA** folder, and all of its contents to a single compressed file.

Creating a Compressed Library File

- Open your library in EndNote
- From the **File** menu, select **Compressed Library (.enlx)** to display a Compressed Library dialog box
- Use the radio buttons to choose from these options:
 - Specify whether you want to **Create** a compressed library or to **Create & Email** the library
 - Specify whether you want to save file attachments with the library or not
 - Specify whether you want to save all references to the compressed library, only the selected (highlighted) references, or only the references in a specific group or group set
 - Select **Next** to display a file dialog
- Save the compressed library to a different location from your working library but **not** in a cloud storage system like Microsoft OneDrive or Dropbox. You can rename the file if you wish.
- If you selected the **Create & Email** option, EndNote will launch your default email system, create a new email message, and attach the compressed library file to the email
- Add the email address of the recipient, the subject, and message and select **Send**

Restoring a Compressed Library File

- Open the **.enlx** file via **Open** on the **File** menu in EndNote
- This will extract the **.enl** file and the **.DATA** folder to the same folder where the **.enlx** file is located
- Use EndNote to open the **.enl** file as normal to use the library

8. Frequently Asked Questions

Why is the name of the organisation displayed incorrectly in my reference list?

You need to enter the name of an organisation (a corporate author) in the author field in an EndNote reference, followed by a **comma** immediately after the name, for example: **Liverpool John Moores University,**

If the name of the organisation includes a comma, for example: Department for Business, Innovation and Skills insert a **second comma** immediately after the one in the name rather than at the end of the name, for example:

Department for Business,, Innovation and Skills

Why has EndNote not displayed all the details I've provided in the references it's produced?

Some styles will not display all the details you provide about items. If a reference to a journal article includes a URL which you want to appear in the reference in a Word document, try opening the reference in EndNote and changing the reference type from Journal Article to Electronic Article.

I've amended a reference in my EndNote library since I used it in a Word document. How can I get the change to appear in the Word document?

With your EndNote library and Word document open, check that the appropriate style is selected in both programs. Select **Update Citations and Bibliography** in the **Bibliography group** under the EndNote tab in Word.

EndNote is the accessed date not displaying in references to web pages

Different styles take the access date information for references to web pages/documents from different fields. It can be worth entering the access date in the **Access Year** and **Access Date** fields, the **Latest Update Date** field and the **Year Cited** and **Date Cited** fields.

The reference I have just inserted looks strange, for example: "{Smith, 1981 #18}" when it should be (Smith, 1981)

Check that **Instant formatting** is **On** in the EndNote toolbar in Word. If it is Off, select the button to turn it on.

9. Further help

- **Help** menu within EndNote
- EndNote Canvas site: <https://canvas.ljmu.ac.uk/enroll/EDA36F>
- EndNote (Clarivate website): https://clarivate.libguides.com/endnote_training
- Academic Engagement Librarian: <https://www.ljmu.ac.uk/microsites/library/about-ljmu-libraries/contact-us/academic-liaison-librarians>

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By: Jackie Fealey