

EndNote™ 20 Guide

August 2021



Use EndNote to:

- Create a library of all your references
- Attach PDFs and other files to your references
- Insert your references into Microsoft Word or Apple Pages documents
- Automatically format your citations and bibliography in your preferred style
- Group references by project, course, or other categories
- Access your library online
- Sync your EndNote library across multiple computers
- Share libraries, and groups of references with other EndNote users

The EndNote Library Interface

The screenshot displays the EndNote Library Interface with four main panels highlighted by colored boxes:

- Groups panel (red box):** Located on the left, it shows a sidebar with options like 'Sync Configuration', 'All References' (100), 'Recently Added' (0), 'Unfiled' (100), and 'Trash' (0). It also lists 'MY GROUPS', 'FIND FULL TEXT', 'GROUPS SHARED BY OTHERS', and 'ONLINE SEARCH' with various library sources.
- Reference List panel (green box):** The central area showing a table of 100 references. The selected reference is highlighted in green.
- Summary panel (blue box):** Located on the right, it shows the title 'Rodrigues, 2021 #87', a PDF attachment 'Rodrigues-2021.pdf', and a '+ Attach file' button. Below this is the title of the selected reference: 'Metabolic profile during pregnancy in BRISA birth cohorts of Ribeirao Preto and Sao Luis, Brazil'.
- Preview panel (purple box):** Located on the right, it shows the citation style 'APA 7th' and 'Copy citation'. It displays the full citation for the selected reference, including authors, journal name, volume, issue, and DOI link.

Author	Year	Title	Journal/Secondary Title	Reference
Pettersson,...	2021	The impact of the physical envi...	Applied Ergonomics	Jou
Roberts, S,...	2018	STRANGE VICES: TRANSGRESS...	Imaginations Journal	Jou
Rocaboy, ...	2016	[The diagnosis of insulin depe...	Soins PEDIATR Pueric	Jou
Rodrigues,...	2021	Metabolic profile during pregn...	Brazilian Journal of Medical and Biologi...	Jou
Rooijacker...	2021	Process evaluation of a reable...	BMC Geriatrics	Jou
Saidj, S.; R...	2021	Which healthy lifestyle habits ...	Nutrition, Metabolism and Cardiovascu...	Jou
Sana, Putr...	2019	TECHNOLOGY ACCEPTANCE M...	Russian Journal of Agricultural & Socio...	Jou
Selander, E...	2015	Predator lipids induce paralytic...	Proceedings of the National Academy ...	Jou
Snyder, K,;...	2021	Perspectives of infant active pl...	BMC Public Health	Jou
Spohr, Do...	2017	Fake news and ideological pol...	Business Information Review	Jou
Swiatonio...	2020	Impact of satisfaction with phv...	Bmc Health Services Research	Jou

Groups panel. Shows default groups and any groups you have set up.

Reference List panel. Shows all the references in the selected group.

Summary panel. Detailed information about the reference and any attached PDFs. Use the Edit tab to make changes.

Preview panel. Displays the reference according to the style shown. The style can be changed from this screen.

Contents

The EndNote Library Interface	2
Getting started with EndNote	4
Download EndNote 20 from the Massey Library website.....	4
Set up sync.....	4
Backing Up Your Library.....	4
Adding references to your library.....	5
Import references from a database.....	5
Internet Browser Compatibility	5
Mac Users	5
Discover / EBSCOhost Databases.....	6
Searching books using EndNote's Online Search	6
Scopus.....	6
Google Scholar	7
PubMed.....	7
SciFinder-N	7
ProQuest Databases.....	8
Import existing full text PDFs from your computer.....	9
Manually add references to your library.....	9
Tips for adding or editing references:.....	10
· Notes and/or Research Notes.....	10
Linking PDFs to references.....	11
Find Full text PDFs for references	11
Manually linking a PDF file to a reference.....	11
Removing a PDF from an EndNote Reference.....	11
Cite While You Write (CWYW) with Microsoft Word	12
Inserting Citations.....	12
Editing and Deleting in-text citations.....	12
Deleting or Moving Multiple References.....	13
Working in Unformatted Mode.....	13
Changing the Formatting of Your Bibliography	14
Set field shading in Word.....	14
Groups	15
User Created Groups.....	15
Default Permanent Groups.....	15
Default Temporary Groups.....	15
Referencing Styles.....	16
Further help.....	16

Getting started with EndNote

Download EndNote 20 from the Massey Library website

Go to <https://www.massey.ac.nz/study/library/referencing-software-and-tools/download-and-use-endnote/> and follow the instructions.

Create and save your Library

The first time you open EndNote you will see an empty grey screen.

Choose **File > New** to create your first library. Use one library only for all your references. Save your EndNote library to a local drive like your desktop. **Do not save to a cloud-syncing folder such as Dropbox, OneDrive, Box, SugarSync, etc.** Cloud-syncing folders corrupt EndNote libraries over time.

Instead set up an online EndNote account at <https://www.myendnoteweb.com>. This will allow you to synchronise your library across different computers, have a back-up in the cloud, and make your EndNote library accessible everywhere.

Set up sync

Go to **Edit > Preferences... > Sync**. Enter your online EndNote account credentials and check **Sync Automatically** is ticked. Click **OK**.

The online version has less functionality so we recommend working mostly with the desktop version when exporting references or working with Cite While You Write.

Backing Up Your Library

We do recommend you do manual backups of your Library as well.

EndNote allows you to save your complete Library to a single compressed file (.enlx) which includes the Library (.enl file) along with its accompanying data folder (.data). Saving this way minimises the danger of losing your PDF links and other problems.

To save a compressed Library file:

1. Go to **File/Compressed Library**.
2. Select what you want to save (the default saves the whole library) and click **Next**.
3. Choose where you want to save it to.

Clicking on the .enlx file will open EndNote and recreate the .enl library file and .Data folder.

Adding references to your library

Import references from a database

Online databases allow you to export references to your EndNote Library, one by one or in a batch.

Records will initially appear in an **Imported Reference** group. This is useful for correcting errors and adding full-text.

The quality of the imported results varies between databases. You will need to check the references in EndNote, and you may need to edit them. Look out for:

- data appearing in incorrect fields
- incorrect formatting of the title field (e.g. capitalisation)
- incorrect reference type selected
- unwanted information displayed

OWLL shows customised examples of APA, Chicago, and MLA references and in-text citations for you to compare at

- <http://owll.massey.ac.nz/referencing/apa-interactive.php>
- <https://owll.massey.ac.nz/referencing/chicago-interactive.php>
- <https://owll.massey.ac.nz/referencing/mla-interactive.php>

Internet Browser Compatibility

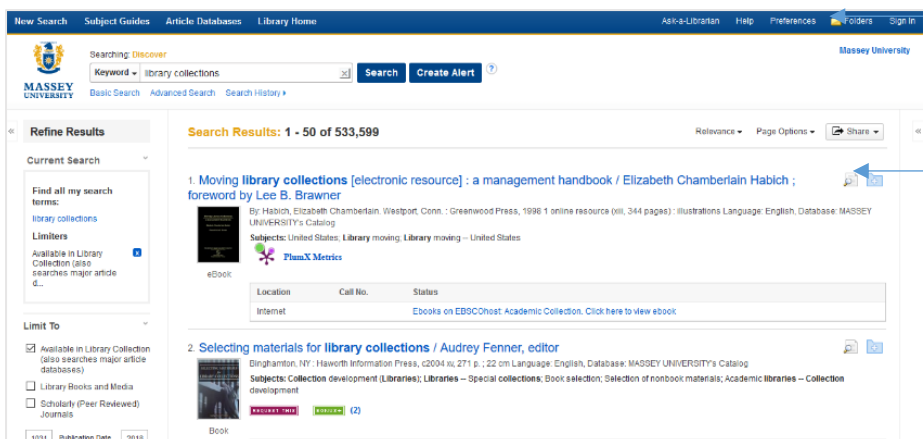
Mozilla Firefox performs best, followed by Google Chrome and Internet Explorer or Edge. IE's security may block or save the file download. Click the security bar, or Save, to then open the file. You may also be prompted to select the Endnote Library to put the references into. You may be unable to direct export using Safari or other browsers.

Browsers will behave differently. EndNote may open automatically. A box may appear prompting you to select the EndNote Library you want to deposit the records into, and/or asking you to Open or Save the file - click **Open**.

Mac Users

When following the instructions below the EndNote Library may not open automatically. You may instead be prompted to select an application and/or the relevant Endnote Library.

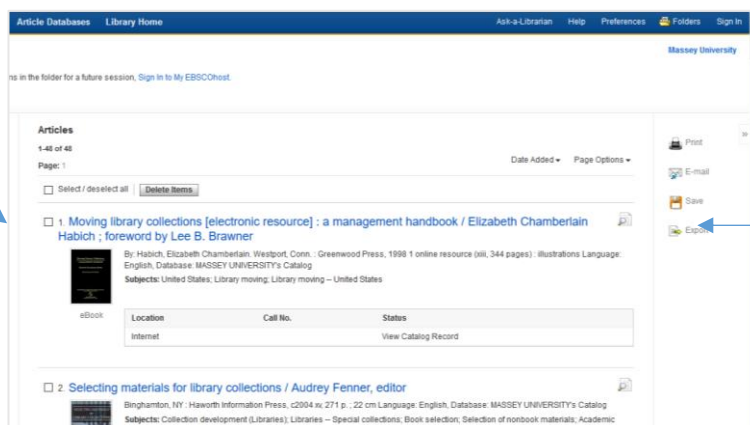
Discover / EBSCOhost Databases



Click the folder icon next to the record you want to reference.
(or **Share** to add all the results from a page)

Find these saved results in **Folders**.

To export individual references **select** the checkbox. Do nothing to export all.



Export references to EndNote.

Next, **Save** in RIS format. Always **Open** (never save) EndNote files. EndNote will open with your references.

Searching books using EndNote's Online Search

EndNote's Online search import records directly from library catalogues and other sources. Massey Library generally recommends exporting from databases instead, with one exception. The records for Massey Library books often need less editing with Online Search.

1. Under **Online Search**, select **Massey Book Search**.
2. Enter your search. Keep your search results small with distinctive keywords.
3. Tick the boxes next to the records you want to keep.
4. Use the plus icon to add the records to your Library.

Scopus

On the results list, there is a tick box next to each record.

1. Tick the ones you want and then click on **Export** at the top of the result list.

2. **Click on RIS format (eg: EndNote, Reference Manager)**
3. From the boxes below select the information you want to export. **Abstract & References** is useful.
4. Click **Export**.

Google Scholar

Google Scholar records will not contain any abstracts or keywords, as Google Scholar exports only citations.

1. In Google Scholar, click on the Menu icon on the top left of the Scholar homepage.
2. Choose settings.
3. From the Bibliography Manager section, select **Show links to import citations into**, and pick **EndNote** from the drop-down box. Click on **Save**.
4. **Import into EndNote** links will now appear for each result.

To export multiple records

1. Sign into Google.
2. Save references to 'My Library' by clicking the star icon under the search result.
3. Access the saved references by clicking "My Library" located at the top right of the screen.
4. Select all or some of the references and export.

PubMed

1. On the results page, tick the records you want to export.
2. Click on **Send To** at the top of the results list.
3. Select **Citation Manager** from the menu.
4. Click on **Create File** to send to EndNote.

SciFinder-N

(i.e.: *Chemical Abstracts, MEDLINE*)

When you have a list of references in SciFinder-N:

1. Select the items you want by clicking the boxes. Selecting nothing will download up to the first 1000 results.
2. Click on the download icon on the top right and select **Citations (.ris)**

NOTE: These two databases may bring in abbreviated journal titles. A fix for journal title abbreviations is at:

https://support.clarivate.com/Endnote/s/article/EndNote-Generate-full-or-abbreviated-journal-names?language=en_US.

ProQuest Databases

(e.g. *ARTbibliographies Modern, Design & Applied Arts Index, GeoRef, Linguistics & Language Behavior Abstracts, Proquest Dissertations, Social Services Abstracts, Sociological Abstracts, etc*)

1. Tick the records you want to save.
2. Click **Save** and choose **RIS (works with EndNote, Civati, etc)**
3. Confirm the options in the box that appears and click **Continue**.

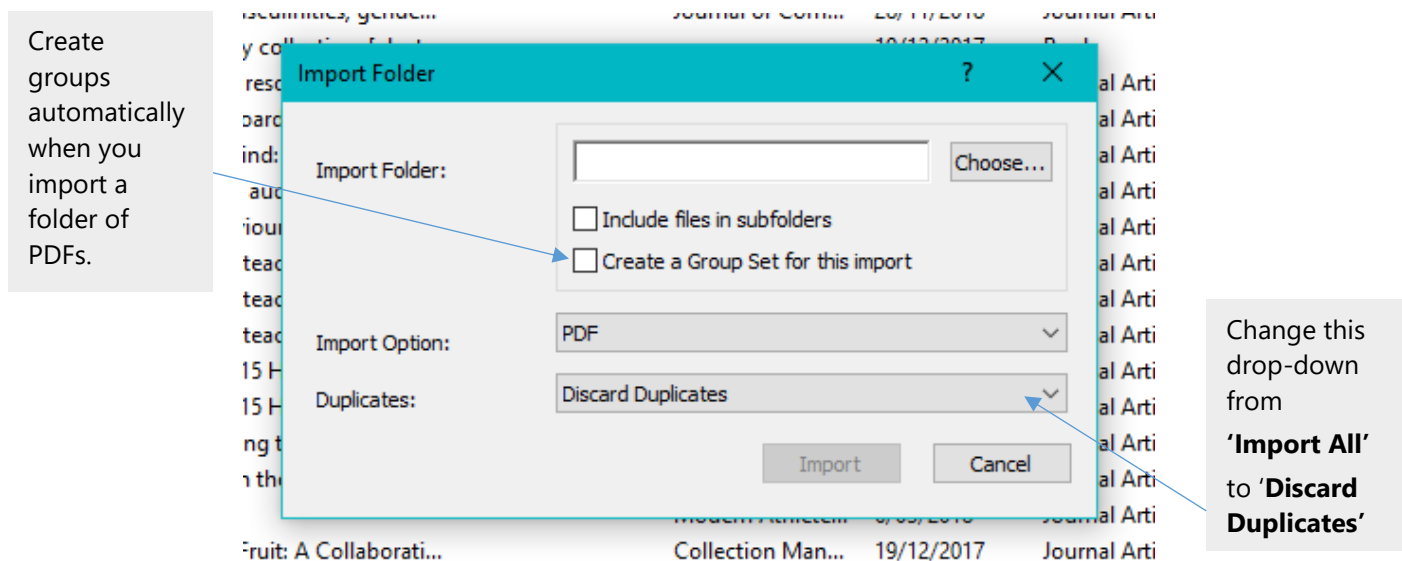
Import existing full text PDFs from your computer.

EndNote can extract the information it needs from many PDFs if they come from publishers' websites. You can also import stored PDFs into your EndNote Library.

In EndNote, go to **File > Import**


> **File** to choose a single PDF, or

> **Folder** to choose a folder of PDFs.

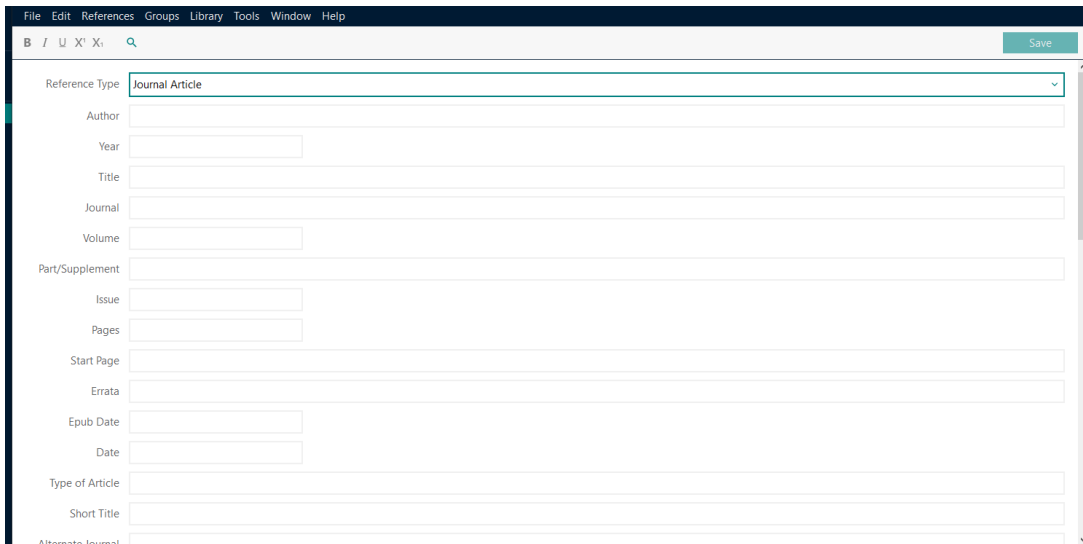


If a resulting record has no information other than the filename as the title, the PDF didn't have extractable information. In this case we recommend deleting the record, exporting the reference from a database, and manually attaching the PDF.

Manually add references to your library

If you can't import a reference you can add it manually. Use  or **References > New Reference** or **Ctrl+N**.

1. From the reference type menu, select the reference type. The default is Journal Article.
2. Type in the key information needed to create a reference and any other information you want to add at this point e.g. keywords
3. Click **Save**.



Tips for adding or editing references:

· **Punctuation**

Apart from the cases below, do not add extra punctuation or text styles to the reference information e.g. bold, italics. EndNote will add punctuation and formatting if it is required by your selected style.

· **Authors**

Author names can be entered First Middle Last **or** Last, First Middle (e.g. Carol Margaret Jacobs or Jacobs, Carol Margaret).

· **Multiple Authors/Editors**

Each individual author **must** be entered on a separate line (press **Enter** to get a new line).

· **Organisational Authors**

Enter with a comma at the end e.g. World Health Organisation,

· **Autocomplete**

As you enter author names, titles, and keywords EndNote will supply possible words based on previous entries. New entries in these fields will initially appear in red font. You can select the supplied word by pressing **Enter** or **Tab**.

· **Titles**

Enter these in the correct case for your bibliographic style e.g.: Sentence case for article or book titles; or Title Case for journal titles. Check a style manual if you are unsure. To **Change Case** select the text in the Edit view and press SHIFT + F3 until the case you want is applied. It will cycle between Sentence case, lowercase, UPPERCASE, and Capitalize Each Word.

· **Notes and/or Research Notes**

These searchable fields can be used to add your own comments to the reference. They will not appear in your bibliography.


· **Record Numbers**

As you enter references into your EndNote Library each record is allocated a **Record Number**. This number does not change even if previous record numbers are deleted.

Linking PDFs to references

Find Full text PDFs for references

EndNote will search online for Full text PDFs to attach to references. Select the reference(s)

and click the **Find Full Text** icon  or right-click > **Find Full Text**. A **Find Full Text** will appear in the Groups panel showing progress.

The Full text may be available even if not picked up this way. Check by right-clicking on a reference a reference and selecting **OpenURL Link** (or **OpenURL**). See if you can navigate to the PDF. If so, save it to your desktop and link it manually.

Manually linking a PDF file to a reference

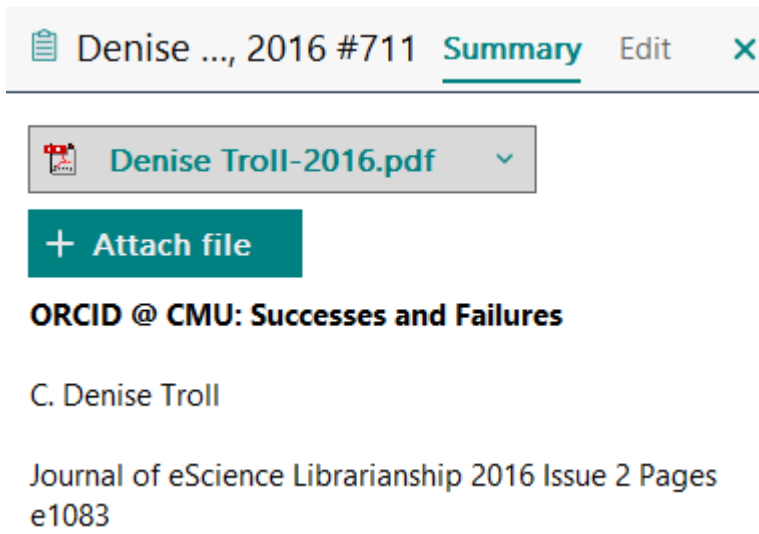
To add a PDF from your computer to an existing reference in your library, either

1. drag and drop the PDF file onto the reference in EndNote, OR
2. click on **Attach file** in the Summary view and navigate to the saved PDF.

Files can be deleted from your computer once in your EndNote Library.

Removing a PDF from an EndNote Reference

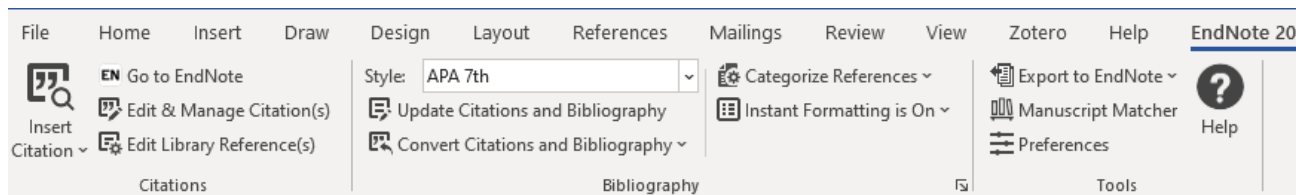
Highlight the reference in your EndNote Library. Use the drop-down menu on the PDF's label and choose **Delete**.



The screenshot shows the EndNote interface for a reference. At the top, there is a header bar with a document icon, the text "Denise ..., 2016 #711", the word "Summary" in blue, and "Edit" and a close "X" button. Below this is a dropdown menu for the PDF file, currently showing "Denise Troll-2016.pdf" with a downward arrow. A green button with a plus sign and the text "+ Attach file" is visible. Below the button, the reference title "ORCID @ CMU: Successes and Failures" is displayed. Underneath, the author "C. Denise Troll" is listed. The journal information "Journal of eScience Librarianship 2016 Issue 2 Pages e1083" is shown. A list item "1." is partially visible at the bottom left.

Cite While You Write (CWYW) with Microsoft Word

Word can import references from EndNote into documents to create in-text citations and build your reference list. The commands below are all in the EndNote tab that will appear in Word once EndNote is installed.



Inserting Citations

You can either insert an already selected citation or search for a citation within Word.

Inserting a selected citation

Place your cursor in the Word document where you want the citation to appear. In EndNote select the relevant reference (or select multiple by holding down **Ctrl**). In Word's EndNote tab click **Insert Citation/Insert Selected Citations**.

Searching for a citation

In Word's EndNote tab click **Insert Citation/Insert Citation....**

You can search by any keyword or author name.

Highlight the citations you want and click **Insert**.

Editing and Deleting in-text citations

Sometimes you need to insert page numbers for direct quotations, exclude the author or year from the display, or add prefix or suffix comments.

To edit or delete an in-text citation use the EndNote '**Edit & Manage Citation(s)**' tool in Word.

In Word, place your cursor on the citation you want to edit.

Click **Edit & Manage Citation(s)**

To edit

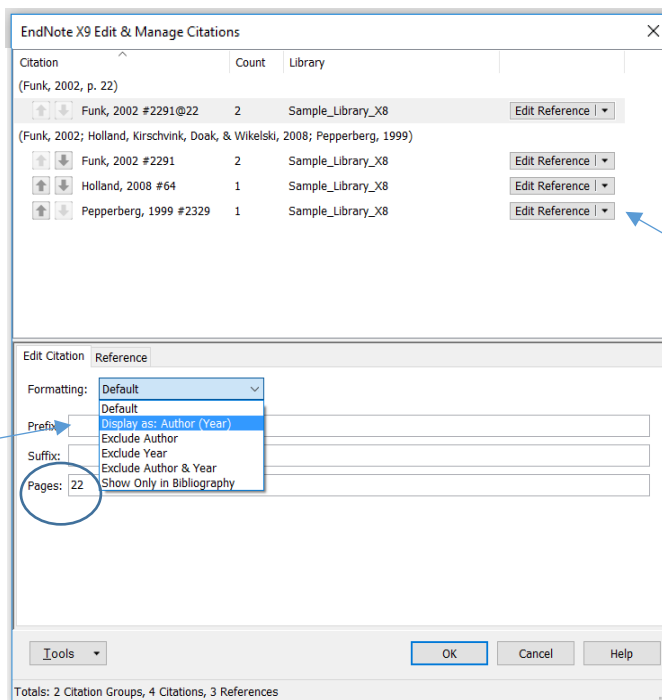
Check the correct citation is highlighted, add page number(s) or select other options as desired. Click **OK**

TIP:

Use 'exclude author' or 'display as author (year)' when you want the author's name outside brackets.

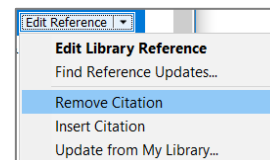
e.g.

Hill (2012) found that people had difficulty...



To delete

Check the correct citation is highlighted, Click **Edit Reference** drop-down menu **Remove Citation**



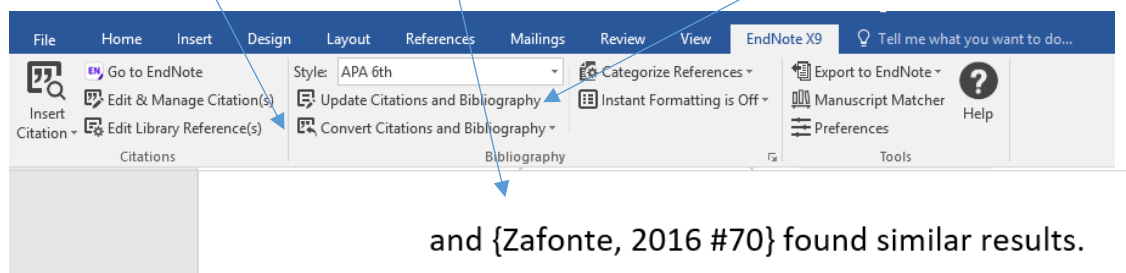
Deleting or Moving Multiple References

In Word, highlight the text you wish to delete or move (or select nothing to do the whole document) and then:

Unformat the citations by selecting **Convert Citations and Bibliography** > **Convert to Unformatted**

This reveals the EndNote code to ensure you move or delete everything. Delete or move the entire block of text (including the citations).

Click on **Update Citations and Bibliography** to reformat your bibliography.



Working in Unformatted Mode

Working in unformatted mode is also useful when working in a very long document such as a thesis. By default, EndNote is set to allow instant formatting which updates the entire document when a new citation is added. If this is becoming a slow process, turn **Instant Formatting** to **Off**.

Changing the Formatting of Your Bibliography

1. Click the **Configure Bibliography** box (bottom right of the 'Bibliography' section - see above)

2. Select the relevant tab and make changes as appropriate:

Format bibliography – this allows you to change the document being formatted and bibliographic style selected.

Layout – lets you give your bibliography a title; change the font, line spacing etc.

Click **OK** when finished.

Set field shading in Word

This function shades your EndNote citations to prevent accidental deletion. The shading will not print.

purity each). Each method was derived by evaluating combinations of three sporulation conditions, including freeze drying of inocula, heat shock treatment of cultures, and subsequent incubation at suboptimal temperatures that yielded the highest percentage of sporulation (Bricker & Tollison, 2011). Pure spore suspensions were characterized in terms of dipicolinic acid content, culturability, decimal reduction time (D) value for heat inactivation (100 degrees C) and hydrophobicity.

Bricker, J., & Tollison, S. (2011). Comparison of motivational interviewing with acceptance and commitment therapy: a conceptual and clinical review. *Behavioural and Cognitive Psychotherapy*, 39(5), 541-559. doi: 10.1017/S1352465810000901

In Word go to **File/Options/Advanced**. Scroll to **Show document content**, and set **Field shading** to **Always**.

Word Options

The screenshot shows the 'Word Options' dialog box with the 'Advanced' tab selected. The 'Show document content' section is expanded, showing several checkboxes and a dropdown menu. The 'Field shading' dropdown is set to 'Always'.

General	
Display	
Proofing	
Save	
Language	
Ease of Access	
Advanced	Show document content
Customize Ribbon	<input type="checkbox"/> Show background colors and images in Print Layout view
Quick Access Toolbar	<input type="checkbox"/> Show text wrapped within the document window
Add-ins	<input type="checkbox"/> Show picture placeholders ⓘ
Trust Center	<input checked="" type="checkbox"/> Show drawings and text boxes on screen
	<input type="checkbox"/> Show bookmarks
	<input type="checkbox"/> Show text boundaries
	<input type="checkbox"/> Show crop marks
	<input type="checkbox"/> Show field codes instead of their values
	Field shading: <input type="text" value="Always"/>
	<input type="checkbox"/> Use draft font in Draft and Outline views
	Name: <input type="text" value="Courier New"/>

Groups

To help organise your Library, you can create Groups, up to 5000 of them. EndNote also has some default groups, both temporary and permanent. All groups appear in the Groups pane on the left.

User Created Groups

Use the Groups menu to create and manage your groups.

1. Having created a **Group** from the menu, add references by clicking and dragging them into the group from the main window. References in a group remain in the All References Group.
2. **Smart Groups** use keyword(s) to match references in your library. As more references are added to your library the Smart Groups automatically update.
3. Individual groups can be placed into **Group Sets** for easier management.

Default Permanent Groups

1. **All References**

Click to view every reference in the current Library, including references in other groups.

2. **Trash**

To move references to the Trash select them and press Delete.

Default Temporary Groups

1. **Duplicate References**

Displays the results of duplicate detection in an EndNote library. These can be searched for using **Library/Find duplicates** for any group. EndNote will prompt you to select which record to **Keep**. If you do not have time to go through all the duplicates, click **Cancel** if you want the default selections kept (the latest record added). Drag the highlighted references to **Trash**.

2. **Find Full Text**

Displays the last group of references for which EndNote inserted either the full text file or a URL - or has not found. When you close the library, this group is deleted.

3. **Imported References**

Displays the last group of references imported into the library. When you close the library, the group is deleted.

4. **Search Results**

Displays the most recent search results. When you close the library, the group is deleted.

Referencing Styles

EndNote comes with around 500 of the most popular referencing styles preinstalled. A drop-down box on the Summary view shows the referencing style being used.

The drop-down menu has several common styles. If the one you need isn't showing:

1. Click on **Select another style...** from the drop-down box.
2. Browse through the EndNote Styles window or use **Find by** to search by subject.
- Click on the **Style Info/Preview** button to toggle between an explanation and a preview of a style.
3. Highlight the style you want and select **Choose**.

A further 6,000+ styles are available from the Endnote website at

<http://endnote.com/downloads/styles>.

Further help

Visit Massey Library's Endnote webpage (Or Google: Massey EndNote)

<https://www.massey.ac.nz/study/library/referencing-software-and-tools/download-and-use-endnote/>

There you will find:

- [QuickStart Video tutorial](#)
- [Register for an Endnote class \(face-to-face or online\)](#)
- [Massey EndNote FAQs](#)
- [EndNote@Massey Blog](#)

Contact a librarian or book an appointment <https://massey.libcal.com/appointments/>

Phone 0800 MASSEY (0800 627 739) and ask for the Library

Email library@massey.ac.nz