Specialist Library Support

Introduction to EndNote 20

Desktop for Windows

Should you require this workbook in a digital format please contact us at

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Contents

Sign up to Endnote online

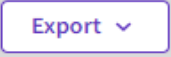Access the **Web of Science** database from the library database list:
www.manchester.ac.uk/library/searchresources/databases/. Sign up for an Endnote online account
with your University of Manchester email address. By using your University of Manchester email
address, you gain more storage space for your references and access to more bibliographic styles.
You will need to register to keep your EndNote online and desktop libraries sync'd.

Open a new Library in a University PC Cluster

1) Click on the Microsoft icon in the bottom left-hand corner, go to program files and scroll down
   to find the Endnote folder.
2) Open the folder and double click on the Endnote program.
3) Click on '**File**' and select '**New**' In EndNote menu.
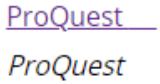4) Give the library a name and save it to My Documents (on your P Drive).

Adding references to your Library

Direct export from Web of Science

1) Go to the Library homepage in your browser.
2) Choose the '**Search Resources**' Tab
3) Select '**Databases**', then find Web of Science under '**W**' and choose on-campus access when prompted.
4) Click on the orange Web of science button in the centre of the screen.
5) Click on the '**Documents**' tab and select '**Web of Science™ Core Collection**'
6) Run a keyword search on a topic.
7) Mark a few records to save and click the [Export ⌄] tab and choose EndNote desktop.
8) Select what level of detail you want to export (Author, Title, Source, Abstract etc…).
9) Download the file to the downloads folder (or wherever your browser is set to download items to),
   where it will usually appear in the bottom left-hand corner of your browser.
10) Click on it to open it in EndNote.

Note: The records will be automatically added to your All References folder and will also be listed in the
Imported References folder. Please note this may take up to a minute if your connection is slow.

Direct export from ProQuest

1) Go to the Library homepage - www.manchester.ac.uk/library

2) Choose the '**Search Resources**' Tab

3) Select '**Search Databases**', you will now be taken to the A-Z list of databases.

4) Select '**P**' from the buttons and scroll through until you see a link for ProQuest/ProQuest (this is the generic ProQuest link) 'ProQuest' as shown on the right to open the library record.

ProQuest

ProQuest

5) Scroll down and under the heading '**Find online**' once again click '**ProQuest**' as shown below:
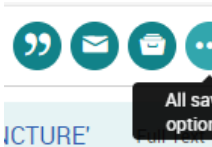
Find online

Full text availability

ProQuest
🛡 *University username and password required off-campus*

6) If you haven't already you may now be asked to login with your university login to access the ProQuest platform/database.

7) In ProQuest run a keyword search on a topic.

8) Select a few records to export by clicking the tick boxes next to them.

9) Click the ellipsis icon above your list of results on the right list of results to reveal the various save options.

All save options

10) From the t options that appear choose the one named 'RIS (works with EndNote, Citavi, etc.)'

11) Save the file to your desktop.

12) Click on the file ⬛ ProQuestDocument....ris ⌃
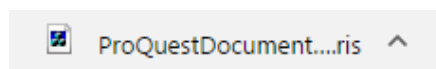
13) Choose destination Export to: EndNote.

Direct export from Google Scholar

Before you carry out a search you need to change the Google Scholar settings by following these instructions.

1) Click on the burger menu icon on the left-hand side.≡

2) Choose the '**Settings**' option.

3) Scroll down to the '**Bibliography Manager'** options.

4) Click on Show links to import citations into and change the drop-down option to 'EndNote'.

5) Click '**Save'.** When you return to your Google Scholar and carry out a search you will see the '**Import into EndNote'** link under each result.

6) Click on the '**Import into EndNote'** save to the desktop and click on the downloaded file as in previous examples.

Adding a new reference manually

In your EndNote library, click the '**New Reference'** icon   or select '**References**' then '**New Reference**' (Ctrl+N).

1) Select '**Journal Article**' from the dropdown menu options and enter the details of the following article:

> **Author:** Hookway, N.
> Jones, R.
> **Year:** 2008
> **Title:** 'Entering the blogosphere': some strategies for using blogs in social research.
> **Journal:** Qualitative Research
> Volume: 8
> Issue: 1
> Pages: 91-113

To save the record, click '**Save**' and then click the '**X'** to close the window.

Note: If there are multiple authors, you should add each one on a separate line as above. You can do this by holding down the CTRL key and hitting return after you enter the name of each author.

Institutional authors such as government departments, NGOs and companies should be entered with a comma at the end of their name e.g. **Department of Work and Pensions,**

Adding a PDF to a reference

EndNote has a function which enables it to search for the PDFs' of full-text articles and attach them to your references automatically.

1) Highlight the references you want to find use '**Ctrl**' + '**A**' on your keyboard to select all the records in your library.

2) Select the '**References > Find Full Text > Find Full Text'** from the menu, you will now be required to login with your University credentials. EndNote will now search the internet for full-text versions of the selected references and if these are available and accessible will add them to your library. Available PDFs' will show up in the Found PDF list.
*Please note it can only search up to 250 records at a time so if you have a large library you may wish to do this in stages or by group.

If a PDF is available on the internet but cannot be downloaded automatically, EndNote will display an entry in the Found URL list. Where EndNote cannot locate a PDF it will display the reference in the 'Not found' list. The number of available PDFs retrieved can vary due to copyright restrictions.

You can also link PDFs' you have downloaded yourself to the corresponding record in EndNote:

1) Double click the record and a window will appear to the right of your Library.

2) Select the '**+ Attach file**' button at the top of the window.

3) Locate the PDF article and select '**Open**' to attach it to the record.

Organising your references

Finding and removing duplicate references

1) From the EndNote toolbar, select '**Library**'.

2) Select '**Find Duplicates**'.

3) View duplicate references in the comparison panel.

4) Select '**Keep This Record**' to retain the version of the reference you want to save.

Creating a Group

You can manage your reference collection in EndNote by creating groups for specific topics, authors or journals. Just follow these steps:

1) In the EndNote toolbar select '**Groups**' then '**Create Group**'.

2) Give your new group a name and it will appear in the left-hand menu under the Groups heading.

3) To add references to a group; drag and drop a reference across or select a group of references and drag all the records across and drop them on the group name.

Creating a Smart Group

You can create a Smart Group with specific searching criteria which will update groups as existing references are edited and new references are added to the library which match your criteria.

1) In the EndNote toolbar select '**Groups'** then select **'Create Smart Group'.**

2) Give your new group a name and then fill in the appropriate criteria for your search e.g. it could be a key author, specific journal, keywords etc.

3) Each time you add new references to your EndNote Library those references that correspond to your Smart Group criteria will be added to your Smart Group.

Formatting your references

Changing your referencing style in Word

1) Select the 'EndNote 20' tab from the ribbon.

2) In the Bibliography section choose your referencing style from the styles drop down.

   If your style isn't there in the drop-down list:

1) Choose 'Select another style…' from the options. A fuller list of options will now be displayed for you to choose from.

2) Select the style you wish to use and click '**OK**'.

Inserting citations and references into Word

1) In Word, copy and paste the following lines of text into a new document:

"EndNote can make writing up your research and creating bibliographies much easier. You can add citations as you write and automatically insert the references into your document. There are thousands of different bibliographic styles available including Vancouver, Harvard, MLA and Nature."

Alternatively just type **=rand(3)** and press **return** this will auto-generate three paragraphs of text

2) Place the cursor at the end of the first paragraph.

3) In EndNote, Highlight the reference(s) you want.

4) Go to the '**Tools**' tab then choose '**Cite While You Write (CWYW)**' finally select '**Insert selected citation(s)**'.

Repeat the process for the second and third paragraphs. EndNote will insert the citations and also create a full reference at the bottom of your document.

Alternatively, you can go to Word via the EndNote tab

1) Select the '**Insert Citation'** icon and a search box will appear where you can type anything that appears in your reference library such as author name, title etc.

2) Select the reference and then '**Insert'** from the search box.

Creating a stand along bibliography in Word

In EndNote, you can select the bibliographic style you want to use from the drop- down options. You can preview the references as they will display at the bottom of the window.

1) In EndNote select several records by holding down the '**Ctrl**' key and highlighting them or '**Ctrl**' and '**A**' on your keyboard to select all the records in your library.
2) In EndNote, select '**References**' then '**Copy Formatted Reference**'.
3) In Word, open a new window for your bibliography and select **Paste** from the home menu. This will copy the records into Word in the chosen style as a plain text file.

Tip: To save time sort the records alphabetically by author before you edit and paste.

Formatting references in Word

To change the bibliographical style of your references:

1) In Endnote select '**Tools**' the '**Cite While You Write**' [CWYW].

2) Choose '**Format bibliography…**'.

3) In the '**With Output Style**' drop down menu select your style e.g. Harvard Manchester.

4) If your style isn't in the default menu click '**Browse'** for the full list of referencing styles and choose the appropriate one e.g. Harvard.

Tip: You can jump to the option you want e.g. Vancouver by starting to type the name.

Editing citations

You can modify the appearance of in-text citations (e.g. exclude Author or Year or add page numbers) using the command in the 'Edit & Manage Citation(s)' in the EndNote X20 tab.

1) To add page references to a citation, highlight the citation you want to edit and click '**Edit & Manage Citation(s)**'.

2) In the **Suffix** field, enter the text as you would like it to appear e.g. [space]p. 57 or [space]pp. 29-36

3) Click **OK** to insert the suffix information into the citation.

To remove the author or year from an in-text citation where you have already referred to it directly in your text e.g. "as Goldacre argues (2008)…"

1) Highlight the citation in Word and select '**Edit & Manage Citation(s)**' in the EndNote X20 tab.

2) Select '**Exclude Author'** or '**Exclude Year'** in the **Formatting** drop-down menu as required.

Inserting Footnotes

You can insert footnotes using Microsoft Word in conjunction with EndNote.

1) Place the cursor where you want your footnote to appear.

2) Select the references tab in Word and select the '**Insert Footnote'** tab or select '**Alt > Ctrl > F**'.

3) This will number your footnote and open the footnote field at the bottom of the page.

4) Now select the 'EndNote X20' tab in Word and select the' **Insert Citation'** icon.

5) Select the citation you want and it will appear at the bottom of the page.

Further information

- **Referencing guide at the University of Manchester:**
  http://subjects.library.manchester.ac.uk/referencing

- **From the EndNote Web homepage click on the "Training" tab for detailed help.**
  http://endnote.com/product-details/basic

- **YouTube EndNote online overview:** https://youtu.be/FqvYH0FUXps

Contacts

If you have any queries about this booklet or the services mentioned in it, please contact the University of Manchester Library Teaching and Learning Team via
uml.teachingandlearning@manchester.ac.uk