EndNote 20 Guide

This is a guide to EndNote 20 in Windows 10 and MS Word 2016. Some things will differ from earlier versions and for macOS. Please check compatibility and system requirements.

1. Download and install EndNote desktop

- To get the program installed, LiU employees should contact their department's software manager.
- Students download the program through the MinIT self-service portal.

2. Create an EndNote library

- Open *EndNote* → Click *File* → Choose *New*
- Choose a name and save your library in a folder on your computer.

EndNote recommends you **NOT** to open and/or use your EndNote library from a cloud-based location, such as Box, iCloud, Sharepoint, Office 365 etc. Save your library locally on your computer.

- Only create one library, there is no way to save references in different libraries. Instead, you can create groups within your library to organize your references.
- Your EndNote library consists of two parts, one file (.enl) and one folder (.data). Both are needed for your EndNote Library to work correctly.

3. EndNote Web

To store your references online, as a safety measure and to access you references from anywhere, you need to create an EndNote Web account (also known as EndNote Online).

Create an account or log in

Sync your EndNote library with EndNote Web

- In EndNote Desktop, choose *Edit* → *Preferences* → *Sync* (Figure 1).
- Click on *Enable Sync,* fill in e-mail and password for your EndNote Online account.
- Mark *Sync Automatically* and finish by clicking OK
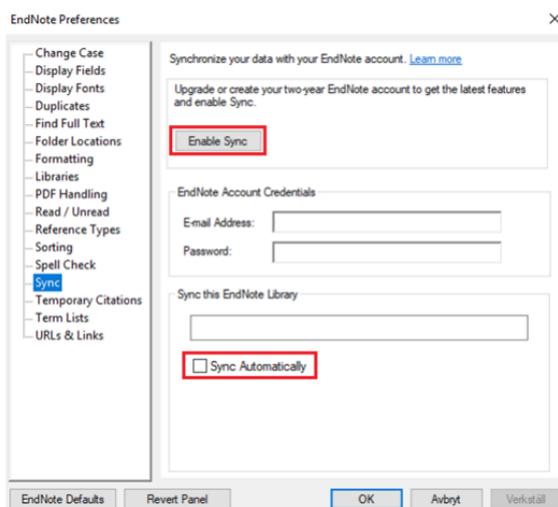
Figure 1 - EndNote Preferences

Your library is now connected to your online account and your references are saved online as well.

4. EndNote Click

EndNote Click is a plug-in which checks for full texts to articles. Using it you can easily get the PDF for articles from a journal website, database or search engine.

- Download the plug-in EndNote Click for Chrome or Firefox.
- Create an account and state that you belong to Linköping University. You will then get access to everything Linköping University Library has a subscription for.
- Choose EndNote as your preferred reference manager under *Integrations* in *Settings* (top right corner).
- When viewing an article online this icon (Figure 2) will appear:

Figure 2 - The View PDF icon
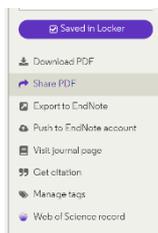
Figure 3 - The Saved in Locker menu

- Click the icon and you will get the full article for reading or download.
- To the right there will be a menu for sharing, download or export to EndNote.
- When exporting to EndNote, the PDF will be connected to the entry in EndNote.

5. Importing references to your library

Google Scholar

- Go to Google Scholar. Choose the menu bar in the top left-hand corner. Click the settings wheel (Figure 4):

Figure 4 - The settings icon

- Choose EndNote as your Bibliography manager.
- Save the settings and start searching.
- Import to EndNote is now visible below each search result.
- Click *Import to EndNote* and the reference should open in your library.

If EndNote doesn't open, follow these instructions:

You need to indicate to your computer which program to use when importing references.

- Save the download file on your computer.
- In EndNote, choose File → Import → File.
- In the newly opened window, choose *EndNote Import* under *Import Option.*
- Find your save file and click *Import.*
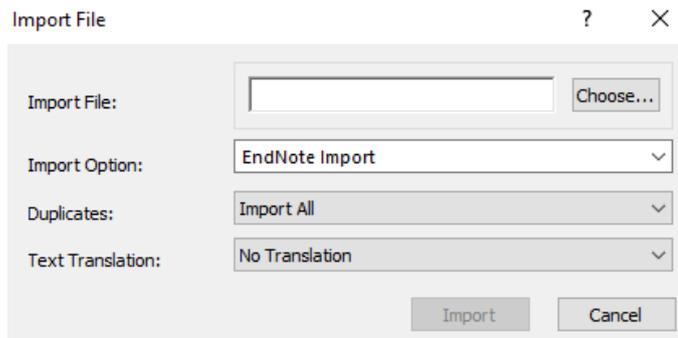
Figure 5 - The Import File form

- Then right-click the download file, either in the download bar or from the download folder, choose *Open with* and choose EndNote 20 if it shows in the menu.
- If EndNote does not show, click O*ther* or *More apps.*
- Click the *Do this automatically for files like this from now on* or *Always use this app to open* box.

PubMed

- Do a search in PubMed and below the title or titles you want to import, click on *Cite*.
- In the window that opens chose *Download.nbib* and the reference should open in your library (Figure 6):
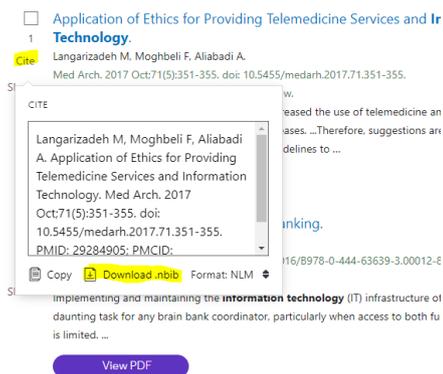
Figure 6 - A PubMed results list

- You may also import several titles at once by clicking *Send to* above the results in PubMed and choosing *Citation manager* (Figure 7). Mark the titles you want to import in the results list.
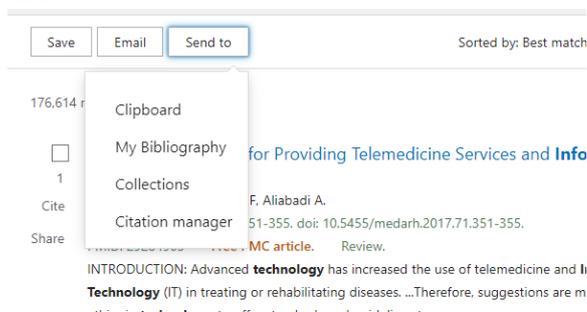
Figure 7 - The Send to button in PubMed

If EndNote doesn't open, follow the instructions for Google Scholar, with this exception:

- As *Import Option* click *Use Connection File* and choose *PubMed (NLM)* from the list.

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Libris (books)

- Search and select a book in Libris.
- Click *Cite*
- In the Citation box to the left on the new page, choose RIS as *Format.*
- Click save as file

If EndNote doesn't open, follow the instructions for Google Scholar, with this exception:

- As *Import Option* choose *Reference Manager (RIS)*.

6. Adding references manually

- Choose *References → New reference.*
- Choose the *Reference Type* you want to add from the drop-down list.
- Fill in information about the source in the corresponding fields.
- The author's name should be written: Last name, First name
  (i.e. Smith, James).
- If there are more than one author, separate the authors by pressing enter and enter each author on a new line.
- If the author is an organization, company or government agency, a comma should be written at the end: Linköping University,
- Save by closing the current window.
- Depending on your chosen output style, different information may be required.

7. Automatic import of PDF-files from a folder

You can create a specific folder for EndNote to import files from. As you add PDFs to the folder, EndNote will import them automatically.

- In EndNote, choose *Edit → Preferences → PDF-handling*.
- Mark *Enable automatic importing* under *PDF Auto Import Folder* (Figure 8). Then select the correct folder on your computer.
- It can take several minutes to import the files to EndNote.
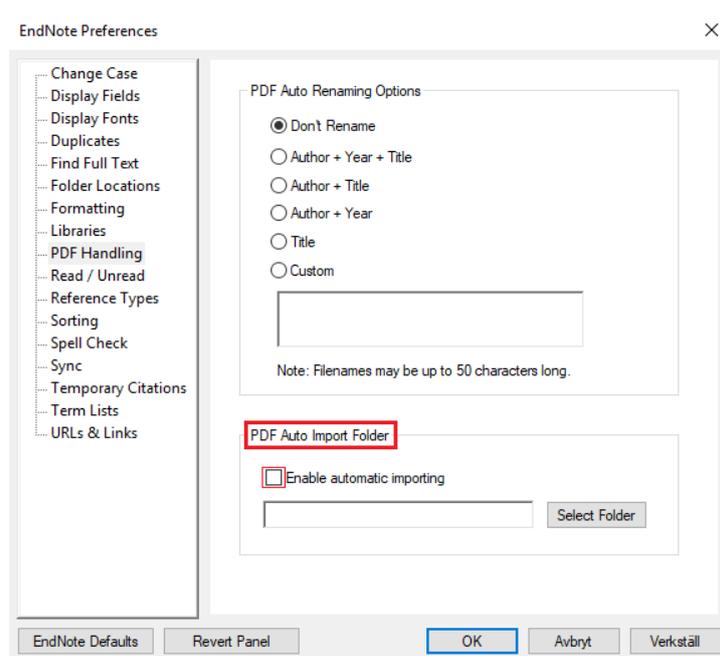
Figure 8 - EndNote Preferences

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8. Automatic Find Full Text

By using Find Full Text you can get EndNote to search for full texts for the references in your library.

- Mark one or more references in your library. Click the icon Find Full Text (Figure 9).

Figure 9 - The Find Full Text icon

EndNote will search for full text for the marked references and a paperclip will be visible on the reference for which a PDF has been found.

The result may not be complete. To improve the result there are some settings you can apply. This will only work within the LiU computer network on campus.

- Click *Edit → Preferences → Find Full Text.* As OpenURL path write: http:/link.bibl.liu.se/openurl (Figure 10).
- Finish by clicking *OK.*
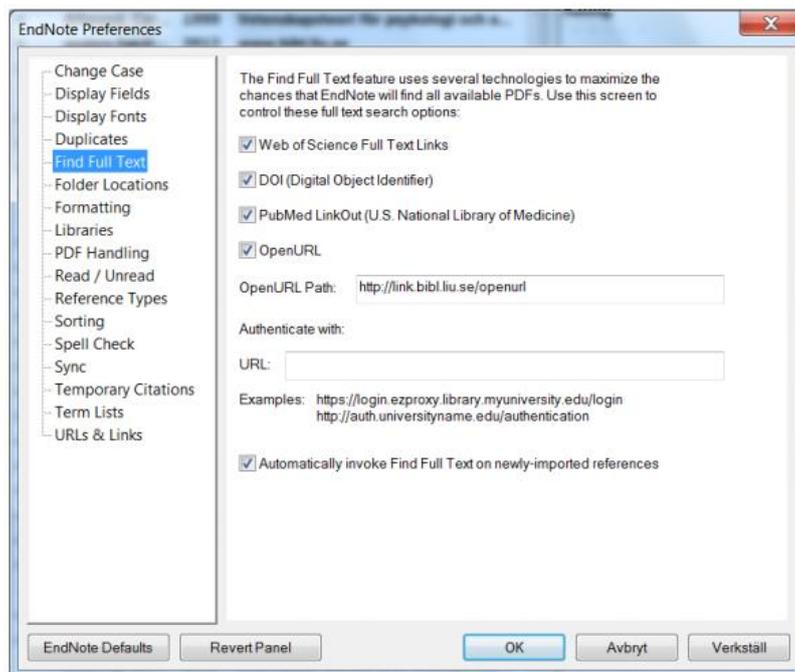
Figure 10 - EndNote Preferences

- If you want to try using the Find Full Text outside the LiU computer network, the result may be better if you use the FortiCLient VPN. More information can be found from LiU-IT.

9. Creating groups and adding references to them

- In EndNote, right-click *My Groups* and choose *Create group*, then name the group.
  OR
- Click *Groups* in the main menu and choose *Create group.*

To add references to groups

- Right-click on a reference and choose *Add reference to* and choose the group you want it to belong to.
  OR
- Click on a reference and drag it to the group desired.

10. Complete backup copy

You can make a complete backup copy of your EndNote library by saving a compressed library.

- In EndNote; choose *File → Compressed Library → Create* Or *Create & email*.
- Save the backup on a USB, external hard drive or somewhere else that is separate from your original library.

Remember that this is a stagnant copy, if you make changes to your library you will need to make a new backup copy.

11. Collaborate and share libraries (EndNote X9 or later)

You can share your library with other EndNote users (if they use EndNote X9 or a later version, as well as an EndNote Web account).

- Choose *File → Share* and write the e-mail address of the person or persons you want to share your library with and click Invite. Or use the icon from the main menu.
- To open a shared library, you need to accept the invitation and go to *File → Open Shared Library.*
- You may also share a specific group with other users. Right-click the folder you want to share and choose *Share group* or click the Share symbol in the menu (Figure 11).
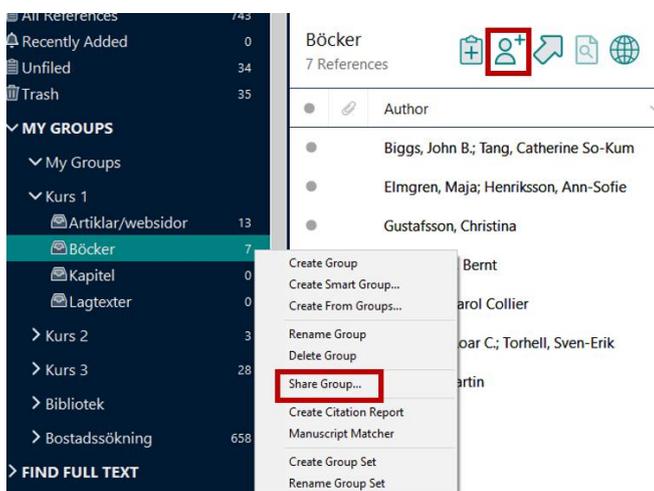
Figure 11 - The Share option

12. Using EndNote and MS Word

In MS Word (2016), you will find the connection to EndNote through the tag *EndNote 20 (Figure 12).*

Figure 12 - The EndNote 20 tag in MS Word

Adding references in Word documents

- Place the marker where you want the reference and click *Insert Citation.* Then search for the reference you want to insert (Figure 13).
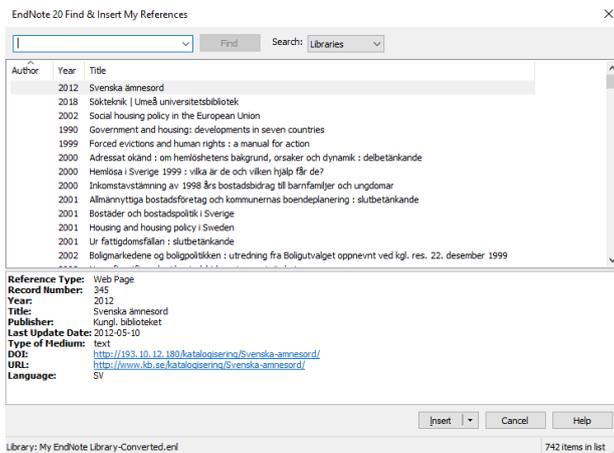
Figure 13 - EndNote 20 Find & Insert My References

OR

- Place the marker where you want the reference and click *Go to EndNote* (Figure 14)
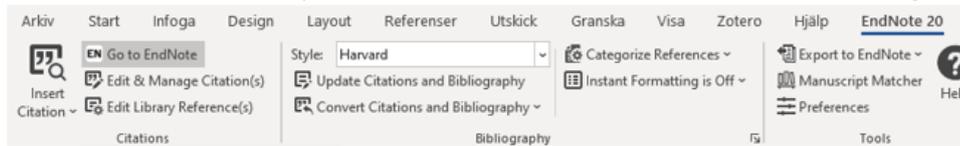
Figure 14 - The EndNote 20 tag in MS Word

- In EndNote, mark the references you want to insert and click the citation symbol in the menu (Figure 15).

Figure 15 - The citation symbol in EndNote

- Once you have added one or more references to your text a reference list will be automatically created at the end of the document.
- You choose Output style from the drop-down bar *Style.* If you do not see the style you want in the list, you can easily find more styles by choosing *Select another Style.*

Edit and remove added references

In your Word document:

- Mark the reference you want to edit and choose *Edit & Manage Citation(s)* under the *EndNote20* tab or right-click and choose *Edit Citation(s) → More* in the drop down bar. A window for the chosen reference will open (Figure 16).
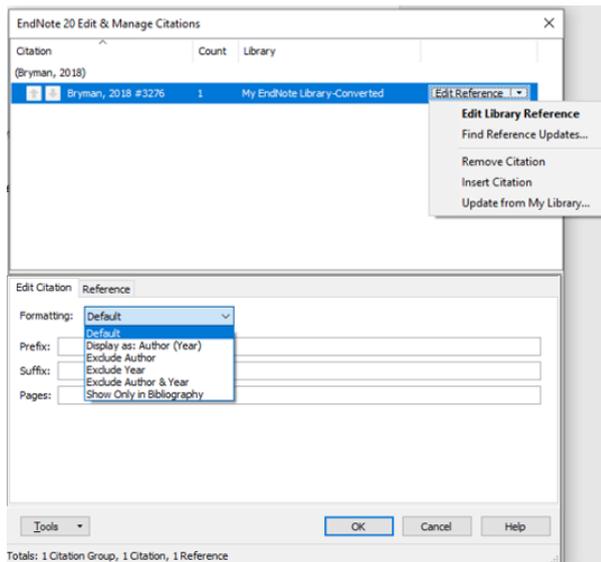
Figure 16 - EndNote 20 Edit & Manage Citations

- To remove the reference, click *Edit Reference → Remove Citation.*
- To exclude the author, year or both choose the applicable choice in the drop-down menu by *Formatting*.
- To add pages to the reference, write the page numbers in the *Pages* field. This only works if the chosen Output style has pages numbers. If it does not, write the page numbers in the *Suffix* field instead.
- Finish the editing by clicking *OK*.

Adding references as Footnotes

If you want to use an Output style where references are in the form of footnotes, you will need to add the footnote field in Word first, adding the footnotes in the text and then add the references into the footnote field from EndNote.

- First, choose a suitable Output style, for example MHRA (Footnote) in the *Style* bar under the EndNote20 tab.
- Place the marker where you want to insert the reference and click *Insert Footnote* under the *Reference* tab.
- Click *Go to EndNote* under the *EndNote 20* tab and choose the reference of references you want to add to you document then click *Insert citation.*

It is not possible to change from an output style using footnotes to one that does not (from MHRA to Harvard for example). If you wish to change style you need to remove all references and then add them again.

Convert to plain text – remove the EndNote connection

When your text is finished and you are ready to hand it in, you need to remove the connection to EndNote.

- In Word, click *Convert Citations and Bibliography → Convert to Plain Text* under the *EndNote20* tab. This will prompt a new document to be created, without connection to EndNote.
- Save the new document with a name that makes it obvious which document is the one to be sent in.

- Make sure to also save the original document, in case you need to make changes to the text later and need EndNote to do so.

13. Download an output style from the EndNote website

- More Output styles (5000+) can be downloaded from the EndNote web page [Output Styles](#).
- You can also get to the downloads through the EndNote Desktop menu: *Edit → Output styles → Open style manager* and click on *Get more on the web*.
- Choose *Download* for the style you want on the website.
- Open the downloaded file by double clicking it and it should open in your EndNote library.
- Go to *File* and *Save as.* If you want to change the name do so and the click *Save.* Click *File* and *Close style* to exit.

14. More information and help

Linköping University Library offers introductions in EndNote desktop to students and employees at Linköping University. Visit our [EndNote web page](#) to find guides and information about EndNote. You can also [book an introduction](#) online or contact us at [biblioteket@liu.se](#).
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