# Essential
# Endnote X9

For Endnote 20 users, see our Essential Endnote 20 guide

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# Essential EndNote X9

**EndNote X9** is a desktop application; versions are available for both PC and Mac. All University of York classroom and office PCs have access to the application and also include the Microsoft Word plug-in to allow inserting citations from EndNote. The licence permits installation on University-owned and personal devices.

This material has been written to be used with EndNote X9 on a University of York PC. Every attempt has been made to ensure the accuracy of the information provided, however you may find some minor differences when working with personalised systems.

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# ~Contents~

# 1 ~ Overview

EndNote X9 is a desktop application. All University of York classroom and office PCs have access to the application and also include the Microsoft Word plug-in to allow inserting citations from EndNote. The application may also be installed on personal computers (PC and Mac). Search for 'Endnote' on the UoY IT Services website for more information (https://www.york.ac.uk/it-services/software/a-z/endnote/).

### EndNote Web

An online version of EndNote, commonly referred to as EndNoteWeb, is also available. Members of the University can sign up for a free, enhanced account.

EndNote X9 has been designed to allow synchronisation between the desktop and online libraries. EndNote Web is available at:

**www.MyEndNoteWeb.com**

## 1.1 - Application use

EndNote is designed to help with referencing at all stages:

- recording citation information
- managing references
- inserting and formatting citations and reference lists in MS Word

References are stored in a personalised EndNote Library and a plug-in creates an additional tab in MS Word.

The reference library can be used to produce reading lists, an annotated bibliography and to insert and format citations and a reference list when writing. Inserted references can be formatted repeatedly using a range of bibliographic styles.

## 1.2 - Library files

An EndNote library consists of two parts with the same name but different extensions:

- The main library file with the **.enl** extension (eg Chocolate.enl)
- An additional library folder with the extension .data (eg Chocolate.data)



Chocolate.enl

Chocolate.Data

**Notes**  If you need to copy or back-up an EndNote library, you must ensure both these files are retained.

Although it is possible to create multiple libraries it is recommended you keep all references in one library and use the Group feature to organise references.

## 1.3 - EndNote 'home' view



Groups

Search panel

Reference panel

Column headings also serve as **sort** controls

Reading indicator

Reference library
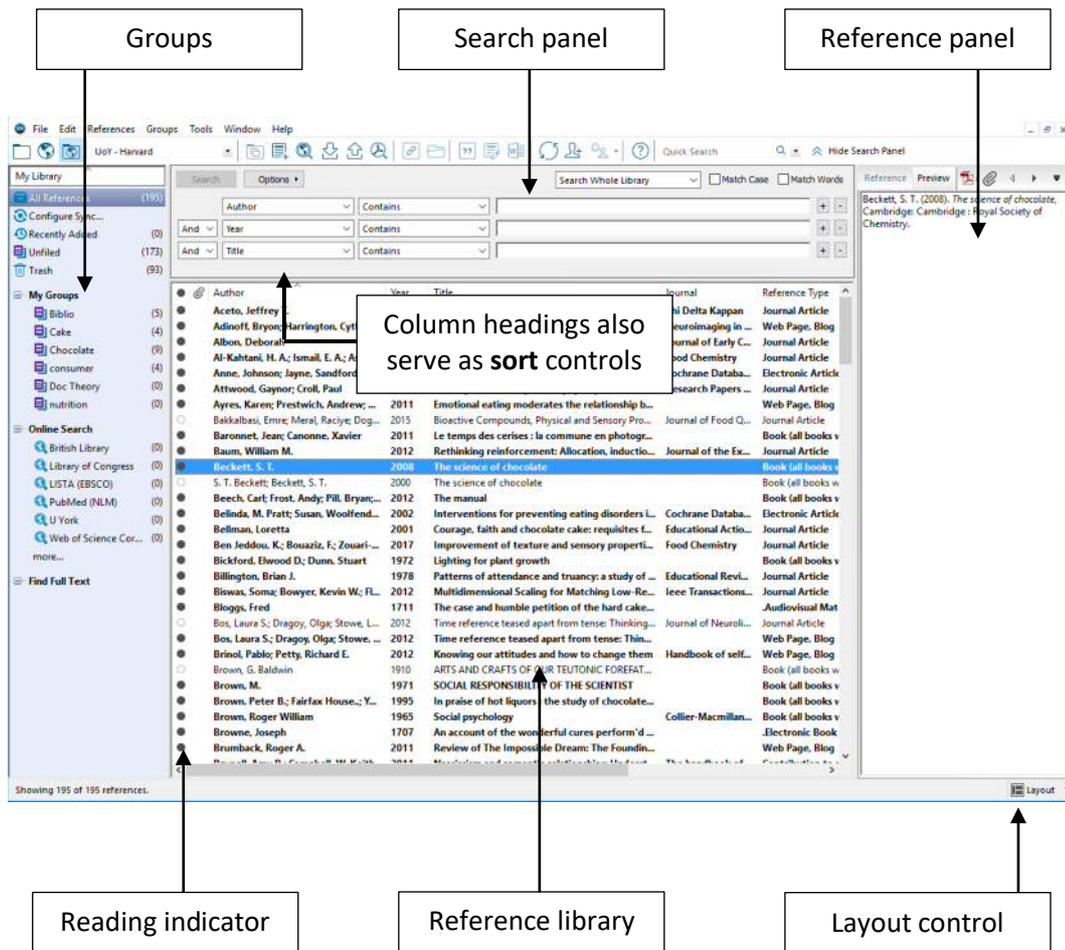
Layout control

Summary:

| Layout control | The (default) view shown above is best suited to a wide-screen device, but can be changed using the layout control |
|---|---|
| Reference library | All references are listed together in the library. The sort order can be changed using the column headings as sort buttons |
| Reading indicator | The small circular button can be used to indicate which items are still to be read (bold items) |
| Reference panel | All available details for the currently selected reference are shown in the preview pane. This panel can also be used to edit reference information |
| Groups | Each reference can be assigned to one or more groups, making it simpler to manage references for multiple projects or papers |
| Search panel | References in the library can be located using the search feature. When connecting to a remote library catalogue this can also be used to locate and import references – you can Show/Hide this panel from the toolbar |

## 1.4 - Viewing Options

### Groups Panel

The panel headed **My Library** (on the left by default) is used to choose which references you will see listed. The content of this panel will change depending on actions you have recently carried out: it may contain, for example, the results of a recent import.

**All References** will always display the complete list of references in your library provided the **Integrated** or **Local Library Mode** is selected on the toolbar.
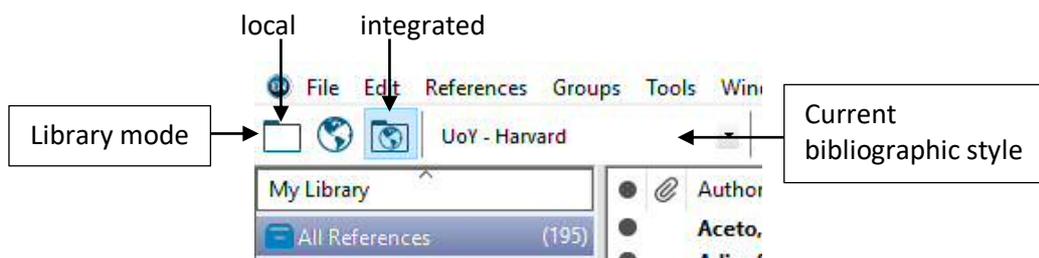


### Reference panel

This panel, on the right by default, can display:

- **Reference** – bibliographic data for the reference in editable fields
- **Preview** – displays the selected reference in the current bibliographic style
- **Attached PDFs** – preview of an attached pdf (also enables extra toolbar to open, save or print the pdf)
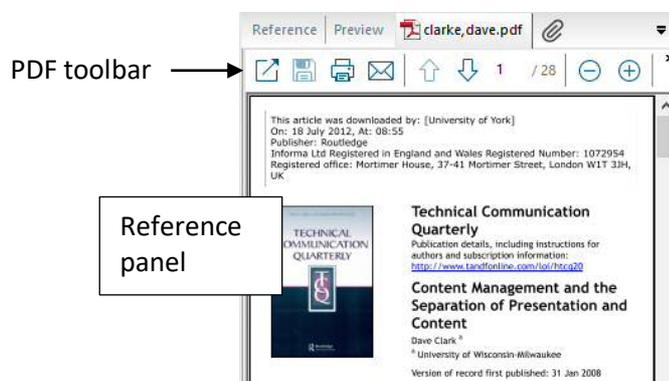


### Further Customisation

Selecting **Edit > Preferences** gives access to further options to customise the view. Of particular interest are:

| Display Fields | Allows you to choose which fields will be visible, and in what order, in the list of references. |
| --- | --- |
| | You may also select whether all authors or only the first are shown in the Author column – this does not affect searching |
| Sorting | Choose words to ignore when sorting by Author or Title |

# 2 ~ Collecting references

The best time to collect reference information is when carrying out a literature search. These can often be added electronically, but manual entry will sometimes be necessary.

Be prepared to try different web browsers – **FireFox** is often best for Endnote X9 on University PCs.

Reference data can usually be acquired from:

- Bibliographic databases
- Google Scholar
- YorSearch
- Library catalogues

Generally there are two different approaches that may be required:

- A one-step transfer into EndNote
- Export of a file from the bibliographic source followed by import into EndNote

## 2.1 - Bibliographic databases

Most bibliographic databases include the ability to export references, but unfortunately there is no agreed standard, so the precise method varies considerably.

### 2.1.1 - What to look for

Most systems will include the ability to select several references for export and a link/button to begin the export, illustrated in these examples:

The available choices will vary between systems, but it's worth trying the following:

## 2.1.2 - Direct Export

1.  If **EndNote** is available on the export list, select this option

2.  If you have a choice between citation/reference only and full reference (including abstract) then choose **full reference**

3.  During export, you may need to choose Open or Save – try **Open** first

If direct export won't work for you, try the export-import approach.

## 2.1.3 - Export-Import

### Export

1.  Even if an EndNote option is available, choose a **RIS** export option

2.  If asked to choose Open or Save, always choose to **Save** the reference file on your computer

### Import

If you have saved the RIS file locally, you will need to import it:

1.  Switch to EndNote and select **File > Import > File**...

2.  Locate and select the downloaded **RIS** file

3.  Choose the **Reference Manager (RIS)** import option and select **Import**

## 2.2 - Google Scholar

Scholar can be configured to include a reference export link with each result:

1    On the Scholar search page, select the icon with 3 bars to the top left, then choose **Settings** (gear-wheel icon)

2    On the **Search Results** settings page, configure the **Bibliography manager** to **Show links to import citations into EndNote** and **Save** the change.



### 2.2.1 - Importing Scholar References to EndNote

This should be a one-step import, but references must be imported one at a time.

1    After searching select the Import into EndNote link

2    As long as you have the option to **Open with EndNote**, choose this for a direct import.

*(Dialogue when using* FireFox *browser)*

Direct import

Save for Import
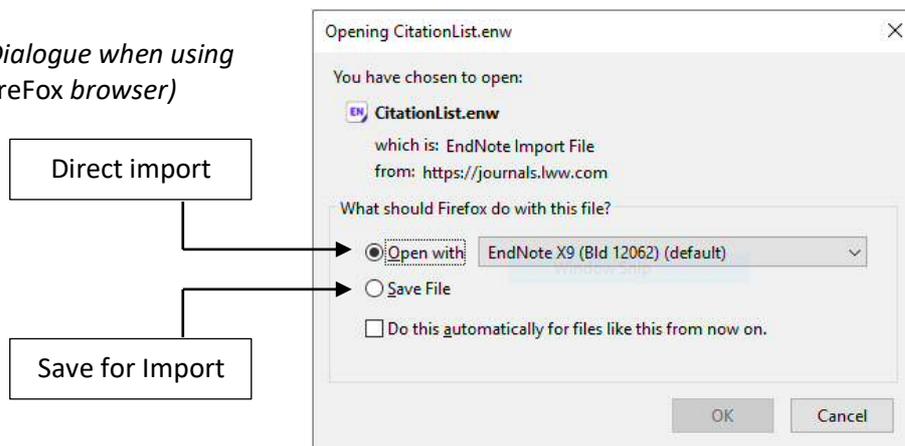


## Alternative

If the one-step option is not available or does not work you will need to **Save** the reference file and follow this with an import.

### Import

1    Switch to EndNote and select **File > Import > File...**

2    Locate and select the downloaded **.ENW** file
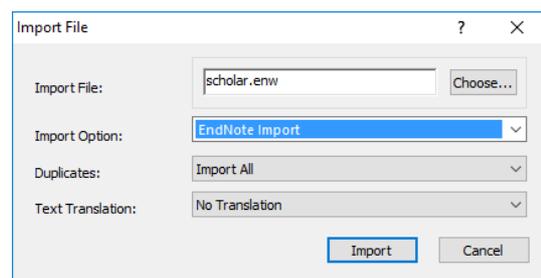
3 Choose the **EndNote Import** option and select **Import**

## 2.3 - YorSearch

For best results on University devices, use **FireFox** web browser. With Internet Explorer or Chrome you may have to use the alternative two-step process.

After you have located items through YorSearch you can import references one at a time, or use the **Saved items** facility to import several at once.

### Single Reference

1 Choose to view **Details** for the required item

2 From the **Send to** drop-down list select the option to Send to **EndNote etc (RIS)**

3 On the **Opening Primo** dialogue, if you have the option to **Open with ResearchSoft Direct Export Helper** then select this and **OK**.

### Multiple References

1 For each reference select the **Bookmark icon**

2 View your **Saved items**, select the references to export and choose **EndNote etc or RIS**, then **Go**

3 On the **Opening Primo** dialogue, if you have the option to **Open with ResearchSoft Direct Export Helper** then select this and **OK**.

Choose **Open** with if the Direct Export Helper is available

Save the RIS file if the Direct Export Helper is not shown

Opening Primo_RIS_Export.ris

You have chosen to open:

Primo_RIS_Export.ris

which is: RIS Formatted File

from: http://yorsearch.york.ac.uk

What should Firefox do with this file?

○ Open with ResearchSoft Direct Export Helper (default)

○ Save File

☐ Do this automatically for files like this from now on.

OK Cancel
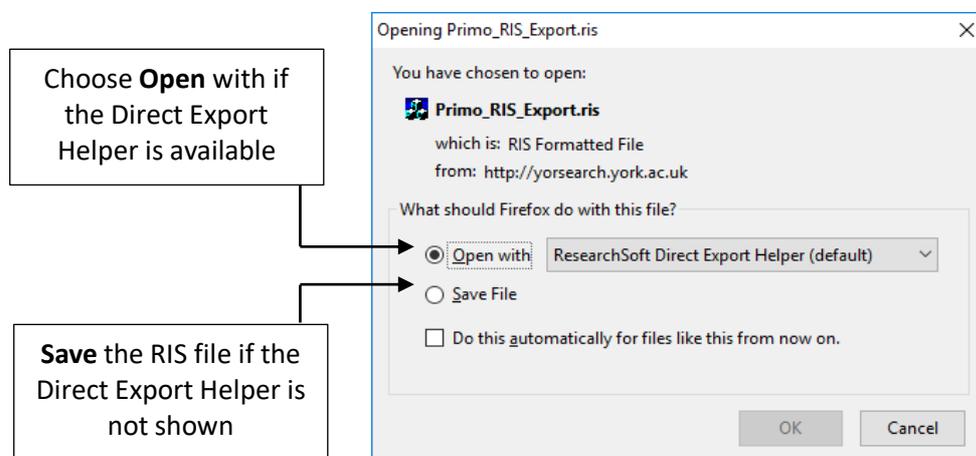
## Alternative

If the one-step option is not available **Save** the reference file and import. Choosing Save will usually place the **RIS** file into your **Downloads** folder.

### Import

After exporting an RIS file:

1 Switch to EndNote and select **File > Import > File...**
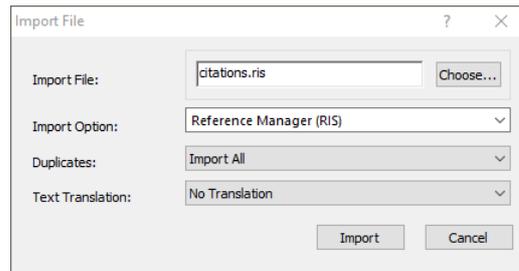
2 Locate and select the downloaded RIS file

3 Choose the Reference Manager (RIS) import option and select **Import**

## 2.4 - Library Catalogues

From within EndNote you can connect to a remote library online catalogue. Although you would not use this for the purposes of literature search, it can be a useful method for obtaining the reference of a book you have on your desk.

1 In EndNote select **Tools > Online search**...

2 Locate the library in the list (the University of York is listed as **U York**) and **Choose** this connection.

The connection will be added to the **Online Search** list on the left.
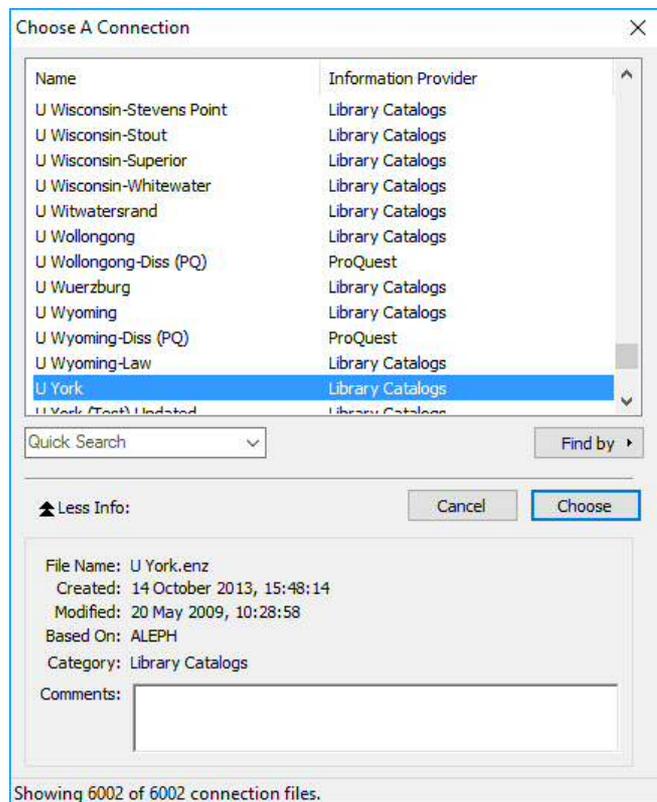


### Searching

Once the connection is created, the search pane will locate records in the Library Catalogue, not in your EndNote Library. Use the search tools to locate the item.



Search tools
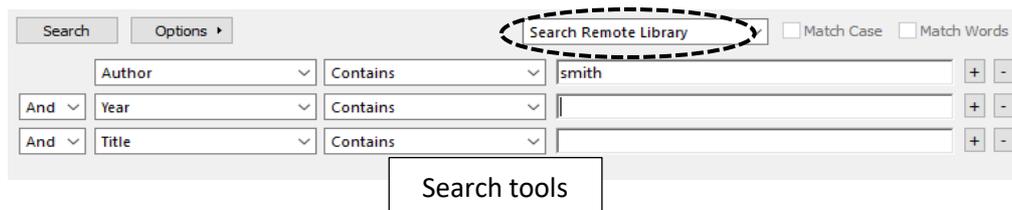
Retrieved records are automatically added to **All References** and can also be assigned to groups as appropriate. Any references deleted from the **Online Search** list will also be removed from **All References**.

## 2.5 - Manual Entry

To enter a new reference manually:

1  Choose **References > New Reference**

2  Select the appropriate **Reference Type** (to ensure the correct fields are shown)

3  Complete the fields needed for citations/reference lists as a minimum

**Notes**  Authors must be **Surname, Forename** with multiple authors on separate lines
Put a comma on the end of an institutional author eg **NHS,**

Although bold, italic and underline formatting tools are provided, you should not use these – leave formatting to the bibliographic styles

4  Choose **File > Save** (or **Close** the reference and choose to **Save** when prompted)

Choose the correct
reference type ⟶   Reference Type: Journal Article

Rating

Enter authors on
separate lines:   Author
**Surname, Forename** ⟶   Dunn, M.
Halfpenny, S.
Hawes, J.

Year
1992

Title
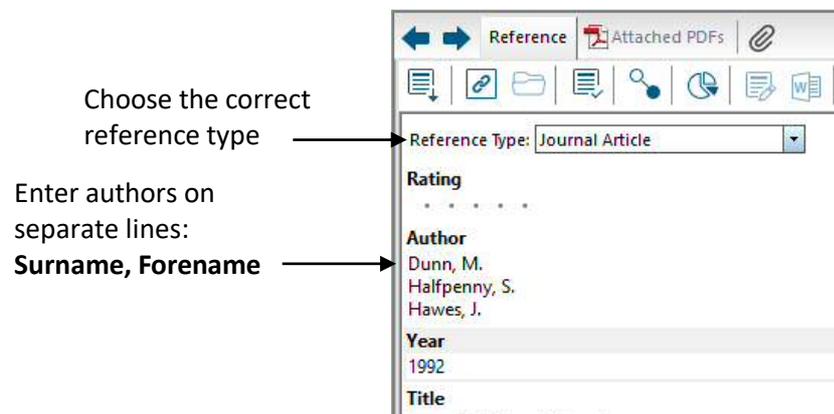
# 3 ~ Managing References

The principal feature for managing references is **Groups**, which exist in a **Group Set**.

## 3.1 - Groups

Each reference may be assigned to one or more groups. Groups help you to manage references for multiple projects/papers, and make it easier to locate references when inserting citations.

### Creating and editing groups

Manage groups using the **Groups** menu or by **right-clicking** on an existing **Group Set**:

Use these controls to manage groups



Right-click menu
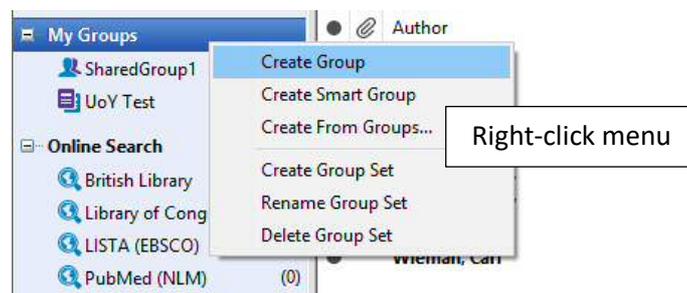
**Note**  Deleting a Group or Group Set does not delete the references it contains.

Deleting a reference when viewing a Group removes it from the group but does not delete the reference from the library.

**Smart Groups** have references added automatically based on user-defined criteria.

### Adding References to Groups

1   View **All References** and select the references you wish to assign to a group (CTRL allows multiple selection of non-adjacent items)

2   Choose **Groups > Add references to**... and select the group

**Tip**   You can also drag selected references onto the group folder, or use right-click on any of the selected references.

## 3.2 - Duplicates

Searching several bibliographic databases may result in duplicate references. To prevent any issues when inserting citations, EndNote can locate duplicates for you to delete.

1   Choose **References > Find duplicates**

2   EndNote will compile a list of duplicates and open a dialogue box to help you decide which to keep. You can also close this dialogue and delete manually from the duplicates list, which is temporarily listed in the Groups panel.

**Note:**  References deleted from the Duplicates list are removed from the whole library.

# 4 ~ Styles, Reference Lists and Citations

EndNote includes definitions for generic referencing styles, such as APA, MLA, Harvard (including UoY Harvard, edited for use at the University of York) and also styles for a wide range of academic journals. Additional styles can be downloaded and you can also edit them yourself.

To locate a style not on your reference list:

1    From the Bibliographic Output style list choose **Select Another Style**...

2    Locate and select the style in the list and select **Choose**
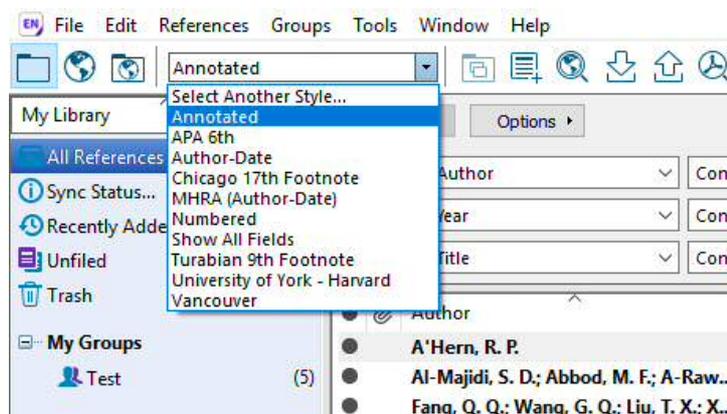
## 4.1 - Creating a Reference List/Annotated Bibliography

A free-standing list of references can be exported:

1    View the group you wish to output as a list or select the references and choose **File > Export**...

2    Enter a suitable file name and change **Save as type** to **Rich Text Format (rtf)**

3    Select the required reference **Output style (**the **Annotated** style includes abstracts**)**

4    **Save** the document to a suitable location

This document can now be viewed and edited using MS Word.

## 4.2 - Citations in MS Word

The installation of EndNote desktop includes the **Cite While You Write** 'plug-in', and extra MS Word tab for working with EndNote. Citations may be inserted from within MS Word or from EndNote and a reference list is automatically constructed.
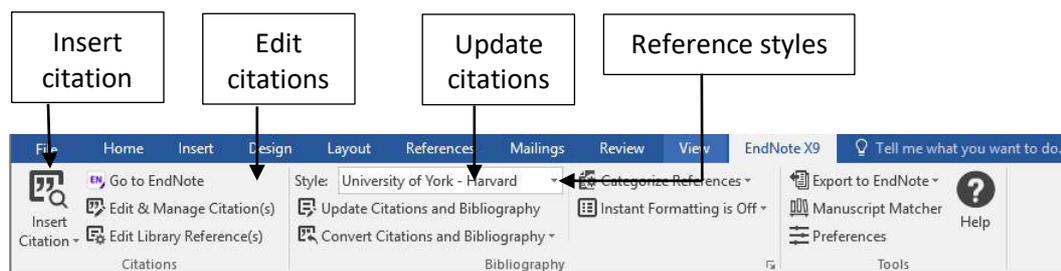
**Note** To switch between EndNote desktop and EndNote Online, choose
**Tools > Preferences** and on the **Application** tab select which to use.

## Inserting Citations – via Word

1 Position the editing cursor where you want the citations to appear

2 On the **EndNote** tab choose **Citations > Insert Citation**

3 Use the **Find** control to locate the reference (by author is simplest)

4 Select one or more references (CTRL for multiple selections)

5 Choose **Insert** for the full citations or choose the drop-down if you need to omit the author or year



Choose to omit author or year if the context requires it
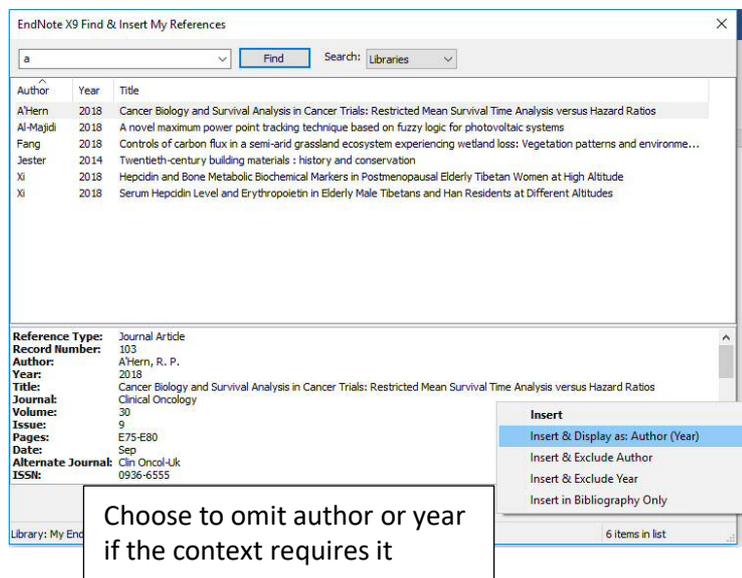
## Inserting Citations – via EndNote

1 Position the editing cursor where you want the citations to appear

2 Switch to **EndNote**, locate and select the reference(s) you wish to insert. You can use your groups to make it simpler to locate the correct reference

3 Choose **Tools > Cite While You Write > Insert Selected Citation(s)** or use the **Insert Citation** button on the toolbar



Insert selected citation(s)
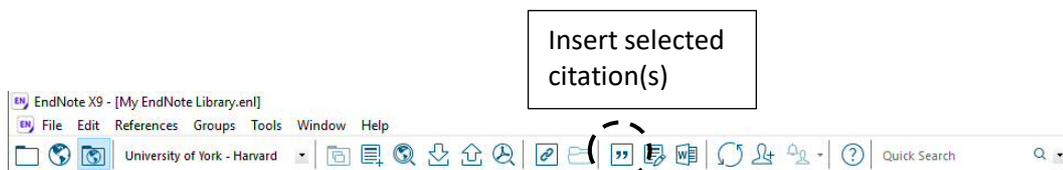
**Inserting Citations as Footnotes**

Some bibliographic styles require citations to be entered as a footnote; to do this you must first use the MS Word footnote feature:

1    In the document position the editing cursor where you want the footnote indicator to appear

2    Select **References > Footnotes > Insert Footnote**

3    This adds a footnote and leaves the editing cursor in the footnote position. Insert the citation as normal using one of the methods above

**Note**    If the chosen style is not intended for footnotes it may not display as expected.

## 4.2.1 - Reformatting Citations and Reference List

Selecting an alternative style on the MS Word EndNote tab will reformat both the citations and reference list in the new style.

## 4.2.2 - Editing Citations

The citations and reference list are populated using MS Word fields. This means you cannot use the **Undo** feature or edit their content directly, but must use the tools provided.
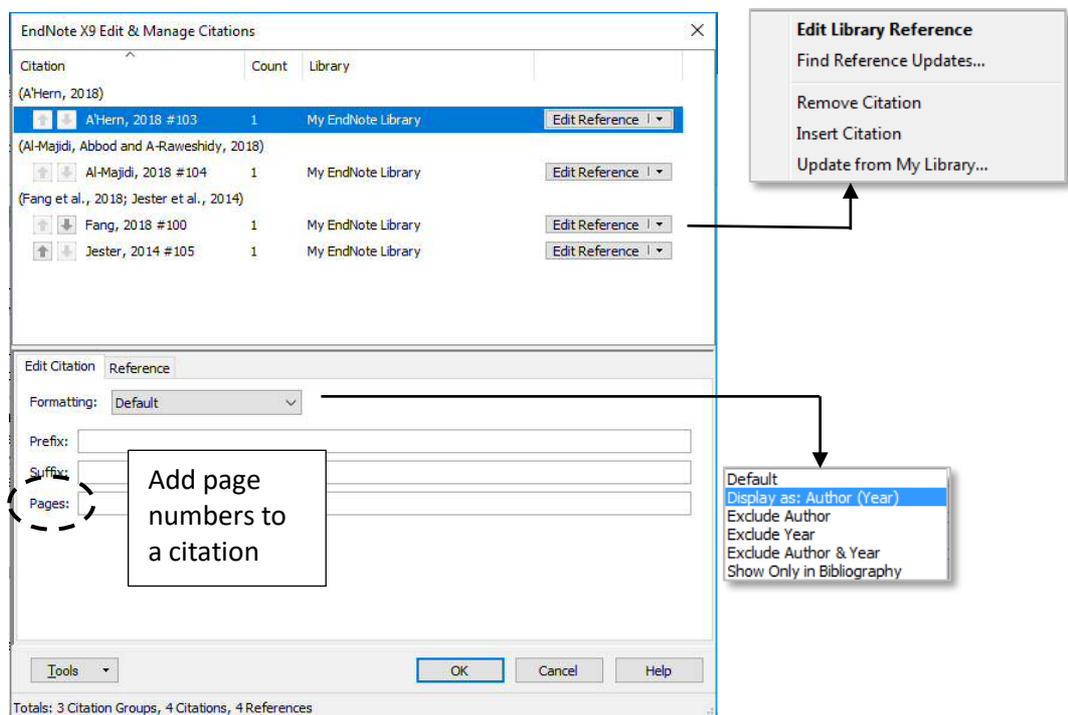


**Edit and Manage Citations Dialogue Box**

To edit citations:

1    Place the editing cursor in the citation to be edited

2    On the **EndNote** tab choose **Citations > Edit & Manage Citation(s)**

The dialogue box enables you to:

- Add/Remove citations
- Show/Hide Author or Year from a citation
- Add pages numbers or other text to a citation

**Note**    If the output style is not configured to display page numbers they may not appear when inserted in the **Pages** section. In this case put them in the **Suffix** but begin with a space and include any necessary abbreviations such as **pp**..

**Tip**    You can also delete a citation by placing the editing cursor to the right of the citation and pressing backspace-delete twice.

After making changes, on the EndNote tab choose **Bibliography > Update Citations and Bibliography** to ensure the reference list is updated.

## Editing the Reference List

Don't attempt to edit the reference list. Its content is derived from the citations so any changes will revert following an update. If you spot mistakes in a reference list you may need to correct the original reference in EndNote.

**Note**    To delete a reference, always remove *citations*.

# 5 ~ Additional features

The previous sections summarise the essential features you will need to use when working with EndNote. Other useful features are described below.

## 5.1 - EndNote and PDFs

Many references include the URL for the online source, allowing you to view the source directly, but you can also attach a PDF to a reference if one is available:

1    In the reference list, select the relevant reference

2    On the Reference Panel, select **Attach file…** (paperclip icon)

3    Locate the PDF document and choose **Open** to attach

4    After attaching the PDF, the reference needs to be saved
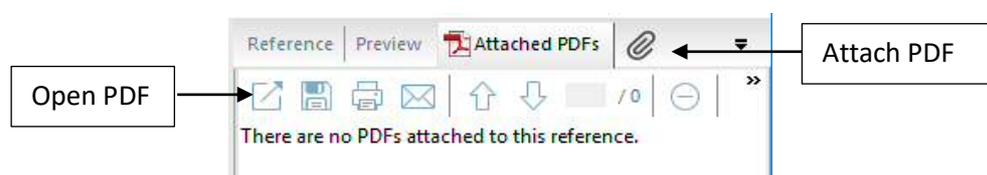


**Note:**  PDFs are saved in the PDF folder inside the **.data** folder of your library.

### Viewing attached PDFs

Attached PDF documents are indicated by a paperclip and can be viewed in the **Preview Panel**:

1    In the reference list, select the relevant reference

2    In the Preview Panel select **Attached PDFs**

3    Select **Open PDF** to view an enlarged, readable version

**Note:**  Reference information can sometimes be obtained from a PDF using **File > Import**… and choosing the **PDF** option. This only works if reference information is included in the PDF and so cannot be relied on.

## 5.2 - Travelling Library

After inserting citations into a Word document, all reference information is stored in hidden form in the citations and is used to construct the reference list. The collection of reference information specific to this document is referred to as the *Traveling Library*.

Some consequences are:

* You can delete and reconstruct the reference list as often as you like without breaking anything – a useful way to fix a badly-formatted reference list or generate a full list of references after combining separate 'chapters'

- The embedded references can be extracted from a Word document and transferred into the EndNote library (**EndNote tab > Tools > Export to EndNote > Export Traveling Library**)

- Editing a Word document containing embedded citations on a computer that does not have EndNote installed does not result in loss of the citations

- Editing a Word document containing embedded citations using an application other than MS Word is extremely likely to corrupt your citations (avoid switching between Open Office and MS Word)

## 5.3 - Adding and editing styles

EndNote is supplied with an extensive range of bibliographic styles, but it is possible to add further custom styles, either downloaded or those you edit yourself.

**Folder Location**

Additional styles are placed in a dedicated folder, the location of which is set in the preferences dialogue box.

**Edit > Preferences > Folder Locations > Style Folder:**

In a networked environment this folder should be on a networked drive so you have access to it in multiple locations – the York default is a folder on the H: drive (Documents folder).
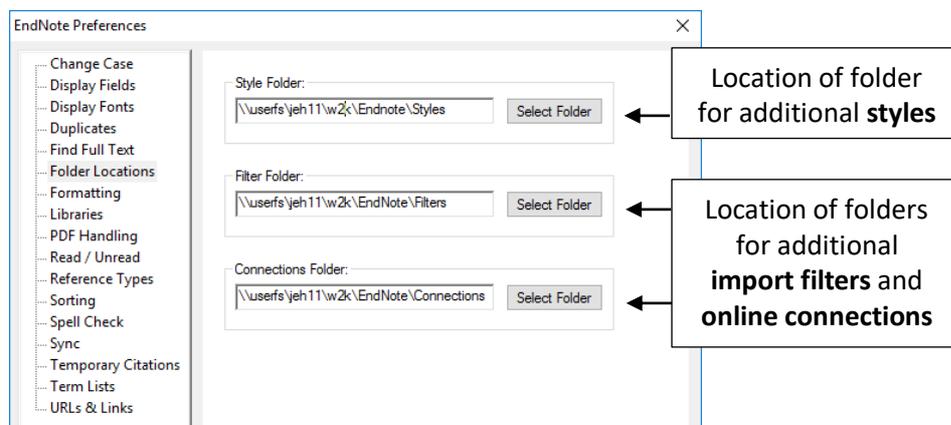


**Adding a downloaded style**

A downloaded EndNote style is simply copied into the Folder Location given in Preferences. This will then be available via **Select Another Style…** in the style drop-down list.

Style files use the extension **.ens**, eg **UoY - Harvard Arch.ens**

**Editing a custom style**

Although you can edit bibliographic styles, it is not straightforward as they need to be designed to display correctly in a wide range of scenarios. You are unlikely to need to create one from scratch but may need to modify an existing style. To start editing an existing style:

1    In the style drop-down, switch to the style to be edited

2    Choose **Edit > Output Styles > Edit "*style name*"**

3    Before making any changes, save a new copy: **File > Save As…**

4    Make the changes to the style and re-save

**Some Key sections are:**

| | |
|---|---|
| **Citations > Templates** | Fields and display for in-text citations |
| **Bibliography > Templates** | Fields and display for reference lists – a separate definition is used for each reference type |
| **Footnotes > Templates** | Fields and display for reference lists that use references as footnotes - a separate definition is used for each reference type |
| **Citations > Author Name** <br> **Bibliography > Author Name** <br> **Footnotes > Author Name** | Format of author names |
| **Citations > Author Lists** <br> **Bibliography > Author Lists** <br> **Footnotes > Author Lists** | Controls when 'et al.' is used in reference lists |

## 5.4 - Find full text

This feature is designed to enable you to locate the source for a reference. Some points to note:

- You will never need to use this feature if you download the source (eg the PDF of an article) when you import the reference into EndNote

- Find Full Text works best if the reference includes the Digital Object Identifier (DOI). The success rate is low without this

- If the source is located, and you are working off-site, you may not have access to full text because you have not gone via a route that can validate your University credentials

Configuration required:

1    Choose **Edit > Preferences > Find Full Text**

2    Open URL Path:
     http://eu.alma.exlibrisgroup.com/view/uresolver/44YORK_INST/openurl

3    Authenticate with: URL:
     http://libproxy.york.ac.uk/login

## 5.5 - Synchronisation

The synchronisation feature enables you to maintain a local EndNote X9 library and an online version containing identical references. This can serve as a back-up or an alternative means of accessing references when away from your usual workspace

**Note** Sync works with only *one* library and *one* EndNote Web account. It is therefore recommended you do not create multiple libraries in EndNote X9, but instead make full use of the grouping features to organise references for multiple projects in single library.

### Setting up synchronisation

If you have not already signed up for an EndNote Web account, do this first as you will need the log-in email address and password to configure the synchronisation. Visit **www.MyEndNoteWeb.com** and use the **Sign Up** link.
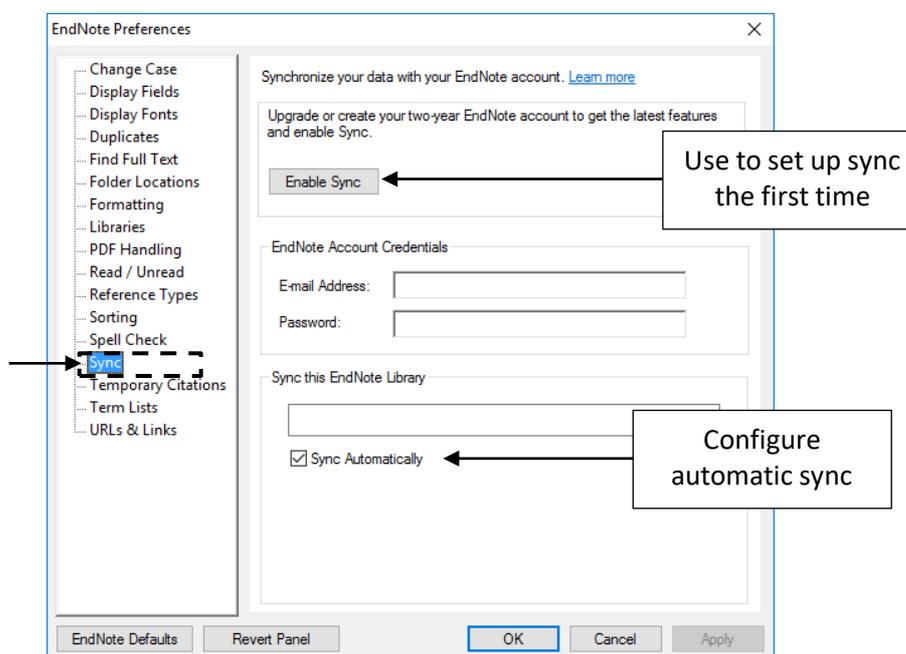


1. Launch EndNote X9 (desktop) and open the local library you wish to synchronise.

2. Select **Edit > Preferences**... and choose the **Sync** category.

3. Select **Enable Sync,** enter your EndNote Web Account credentials and choose **OK**.

   After authorising your account, you will be asked to complete some registration details (which are very similar to those requested when registering for EndNote Web). After registering, EndNote will recommend you create a library backup. It doesn't take long so is worth doing.

4. On returning to the **Preferences** dialogue box, check your credentials are correct and that **Sync Automatically** is checked.

5. Synchronisation happens automatically, but to force it choose **Tools > Sync** or the **Sync with EndNote Web** button on the toolbar.

## 5.6 - Plain Text

Word **fields** are used to generate the content of citations and reference lists; fields generally display content acquired from another source and so do not contain directly editable text. Fields are essential for many features (including page numbers, captions, cross references tables of contents and the functionality of the EndNote plugin)

After inserting citations, however, you may want a fully editable document; this could be for several reasons:

- Some citations or references do not display correctly and need minor edits
- You want to avoid the risk of a reviewer's reference management application changing your citations/references
- You want to check the document using *Turnitin*

To create a 'fixed' version of a document, converting your citations and references to editable text:

- Choose **EndNote tab > Bibliography > Convert Citations and Bibliography > Convert to Plain Text**

This creates a copy of your document, which you should save with an alternative file name so as not to lose the 'original' containing the Word fields.

## 5.7 - Categorised Reference lists

By default EndNote will generate one reference list from the citations in your Word document, but you can also create a categorised list; for example, you may wish to separate primary and secondary sources, or define some other group of references.

**Note:** Categorisation is applied to the existing citations in your document, not to the references in your library.

1    After inserting citations, from the EndNote tab choose **Bibliography > Categorise references > Configure categories**

2    In the **Configure Categories** dialogue (see below):

a)    First create or edit the required categories; primary and secondary sources are there by default, but you can remove or edit these.

b)    Assign each reference to the appropriate category using 'drag and drop'.

**Notes:** A reference can be assigned to only one category, so if you make a mistake simply drag it to another

It is also possible to categorise references by reference types; this requires the editing of the relevant bibliographic output style in EndNote to define the category headings and reference types to be used.

New category

Remove category

Select a category to edit its heading

Drag to assign
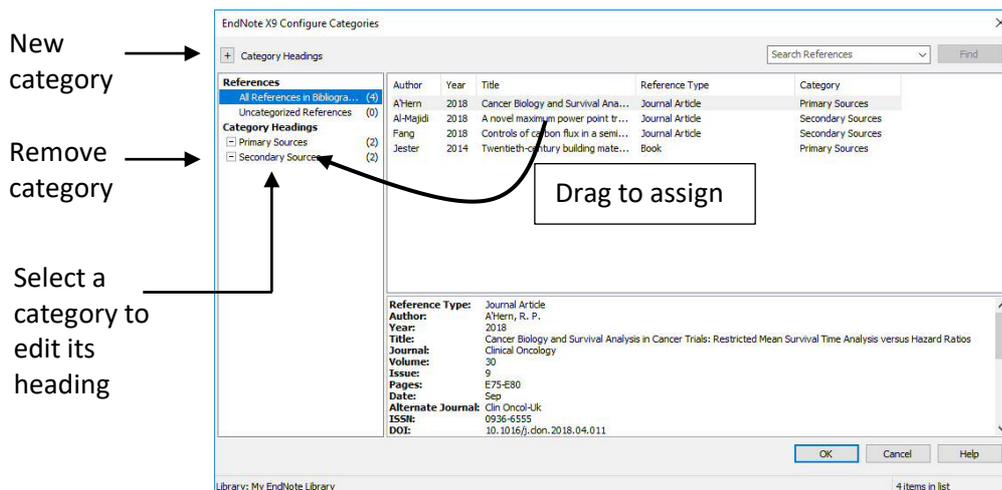
**Tip:** **Group References by Custom Categories** is disabled by default but you can turn categorisation on and off using the **Categorize References** control on the ribbon.
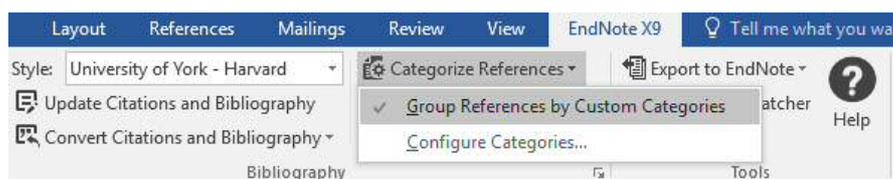


## 5.8 - Google Scholar and Full Text

When Searching using Google Scholar, in addition to configuring bibliographic links for reference import (see Google Scholar, p6) you can configure it to show links where the full text is available at York.

Some University managed PCs are pre-configured, but you may want to add these to your own equipment.

1    On the Scholar search page, select the three bars icon at the top left, then choose **Settings** (gear-wheel icon)

2    In the left hand menu, switch to the **Library links** settings page and search for the University of York

3    Select the option **University of York – fulltext@York**

4    **Save** the settings

Choosing the fulltext@York link when searching will then link to the resource via YorSearch.

## 5.9 - Share Reference Library

Share specific groups using EndNote desktop or your entire library with read-only or read-and-write access

1    For your entire library click the **Share Library** icon in EndNote. For groups, right-click on a custom group and select **Share Group**
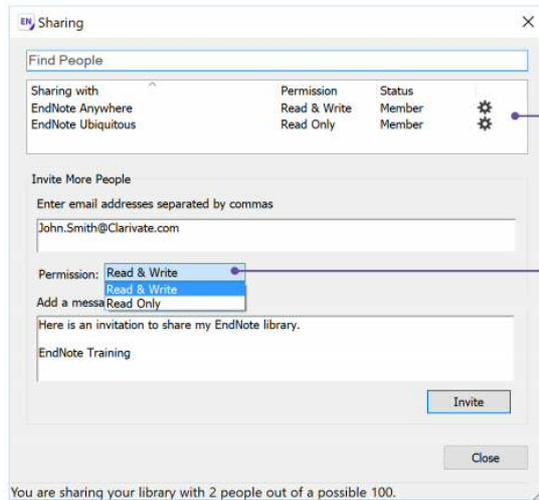


**See who is sharing your library**

You can share your library with up to 100 EndNote X7, X8, or X9 users. You can see a list of whom it is being shared with, change their permissions, or remove them from the list at any time.

**Invite colleagues to share your library**

Invite colleagues to share your entire library—and have the choice of giving them full Read & Write access or limiting them to Read Only access.

## 5.10 - Manuscript Matcher

Help find a journal that might be interested in publishing your paper. Start with a few key pieces of information: manuscript title, abstract, and references. View suggested publications from analysis and compare your options and start the process to submit your manuscript

1    Right-click on a group in your EndNote library and select **Manuscript Matcher** or select **Manuscript Matcher** from the **EndNote** plugin in Microsoft Word

2    Complete the requested online details and click **Find Journals**