ENDNOTE 21

Introduction to the desktop version

University of Huddersfield Library

library@hud.ac.uk

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Section 1: Introduction

This guide provides an overview on using EndNote 21 software via the University of Huddersfield. There are various set up options to choose from, depending on whether your main device is your own or University owned. If you have any queries, please direct them to the librarians at library@hud.ac.uk

Section 2: Installing/ accessing EndNote

Follow the relevant section guidelines depending on your preferred working environment. We recommend all users create an EndNote Online account too (see 2.3), to have a backup copy in the cloud, hosted by Clarivate, the owners of EndNote.

2.1   Installing EndNote 21 on my home device or personal University laptop

You can get a free download of EndNote 21 on your home device or personal University laptop.

Go to the software download page and select EndNote 21 (Mac or Windows as preferred). You will be prompted for a login and password. The username is in the format **u1234567** for students or **cmsxabc** for staff. Open the zip folder and follow the instructions for installation.

2.2   Accessing EndNote 20 on a University networked PC

All networked PCs in the Library should have EndNote 21 installed. If the computer you are using in your department doesn't or has an older version of EndNote, please contact your local IT support (school or Library as appropriate).

You will find EndNote by clicking on the Windows button or using the search function, both in the bottom left of the screen.

When using a shared computer on campus you need to be aware of where you save your EndNote files. **EndNote is not compatible with any cloud storage services**, including SharePoint (UniShare), OneDrive, Box Sync, Google Drive, DropBox and iCloud, as the files may corrupt over time. We recommend saving onto the computer hard drive, which should be labelled as the C: Drive on university computers. See section 3.1 below for further details.

Section 3: Setting up EndNote desktop

This section assists you in setting up your library in the desktop version and linking it to a backup version via EndNote Online.

3.1   Creating an EndNote library

Open EndNote on your device. If you already have an EndNote library on your device (e.g. set up with an older version of EndNote) then it may open automatically.

Windows instructions:

If you are a Windows user you will be presented with this screen:
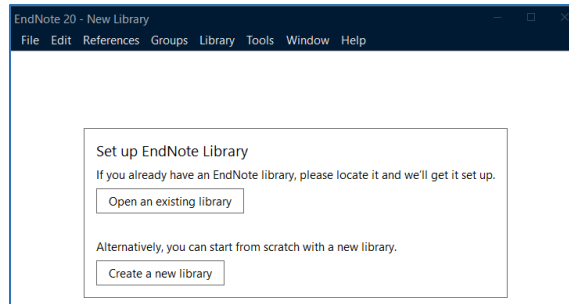
Select **Open an existing library** if you already have an EndNote library, and it will prompt you to locate the file on your device. Please check that it is not stored in any cloud storage space, e.g. OneDrive.

Select **Create a new library** if you are new to EndNote. **Do not save the file to OneDrive, Dropbox, or any other cloud storage service**. EndNote files are not compatible with cloud storage and will corrupt over time.
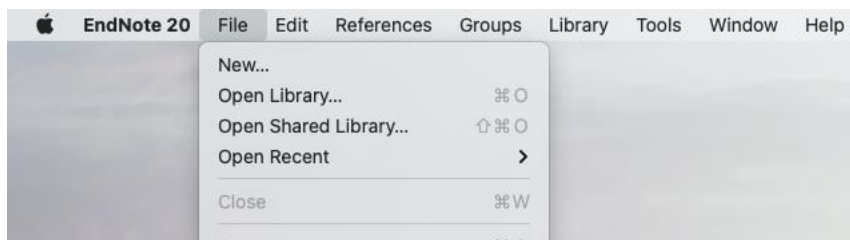
Instead, please save the EndNote library file to the local hard drive. If you are on a university-owned computer, you will need to save to the folder labelled with your username in the C: Drive. You will find this in C: > Users > [username]. You will need to set up an EndNote Online account to sync your library. Instructions for syncing your EndNote library are in Section 3.2 of this workbook.

If you need help with saving or accessing your files, please contact IT Support for further advice on it.support@hud.ac.uk or phone 01484 473737.

Mac instructions:

If you are a Mac user you will be presented with an EndNote toolbar at the top of the screen.

Go to File. Select **Open Library** if you have an EndNote library. It will prompt you to locate the file on your device. Please check that it is not stored in any cloud storage space, e.g. OneDrive or iCloud.

Do not save the file to iCloud, OneDrive, Dropbox, or any other cloud storage service. Instead, please save the EndNote library file to the local hard drive. You will need to set up an EndNote Online account to sync your library. Instructions for syncing your EndNote library are in Section 3.1 of this workbook.

The empty library on either PC or Mac will look like this:
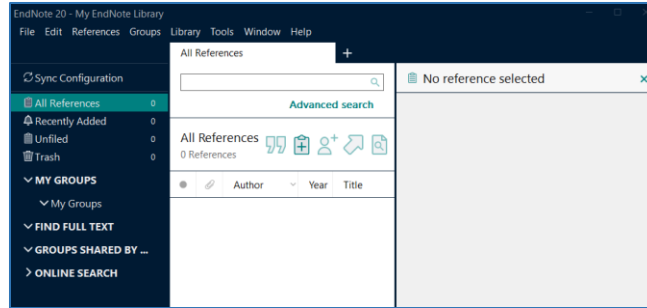
3.2   Creating an EndNote Online account to sync with desktop

All users **must** create an EndNote Online account to back up your account and allow you to access your library on multiple devices. The backup will be hosted by Clarivate, the owners of EndNote, in their own cloud storage.

EndNote Online also allows you to share your library/ groups of your references with other EndNote users. This is useful if you are collaborating on research across the university or with external researchers.

To create a backup with EndNote Online:

- Go to the EndNote Online registration page.
- Follow the instructions to register an account.
- Confirm the email notification to complete registration.
- Return to EndNote 20 desktop version.

To sync your online account with your desktop library:

- Click on **Edit** (Windows) or **EndNote** (Mac) from the top left-hand menu, then select **Preferences**.
- This pop-up box will appear (Windows, left, or Mac, right):
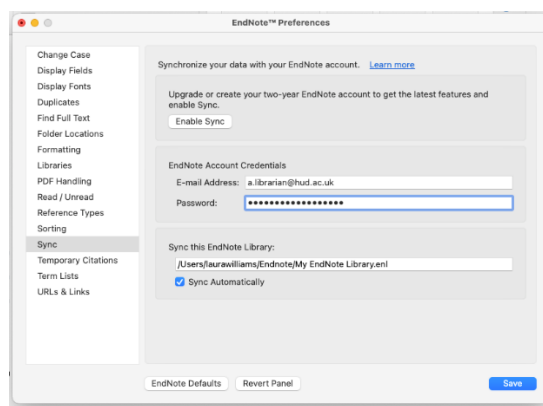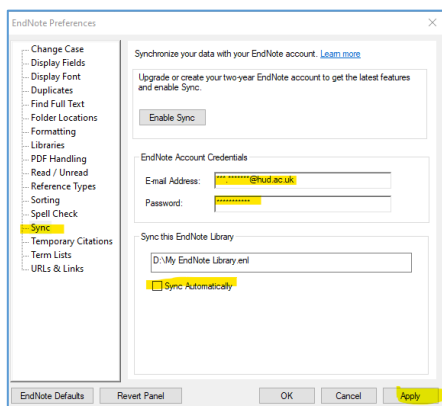
- Click on **Sync** from the left-hand menu.
- Type in the email and password you used for your EndNote Online account.

- Untick the **Sync automatically** box (we encourage you do this manually, every time you log off, because if not the library regularly syncs to the cloud and can slow down the performance of EndNote.)
- Click **Apply** (Windows) or **Save** (Mac) to finish the set up.

3.3   Tips on syncing EndNote Online with your desktop account:

- We recommend syncing your account every time you launch EndNote Desktop, and again when you have finished working with it. This will ensure you are working with the most up-to-date version of your library at the start of each session, and that you save any changes at the end.
- To sync manually, click on **Library** from the top toolbar and select **Sync**.
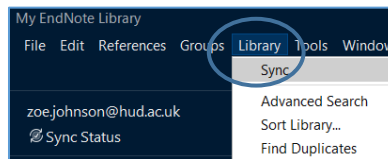
- You can see when you last synced by clicking on **Sync Status** on the left-hand side.
- If you cannot install software on your own device, or prefer to work online, you can use EndNote Online as a standalone, web-based app. See our EndNote Online workbook for instructions on using this similar, but different interface.

3.3   Importing references into your Library from Summon

There are many ways of importing references into your Library. We recommend clicking on the arrow to the left of ONLINE SEARCH to close it. This option is not configured to work with University of Huddersfield systems. We will show you more productive ways of importing references.

We will start with Summon, as the University of Huddersfield's catalogue of owned print and electronic resources.

### 3.3.1   Adding references from Summon

- Make sure an EndNote library is open, minimise the screen. Open Summon (you will always find a link to Summon on the University web pages or MyHud) and search for the topic you are interested in.
- Export any individual items you wish to save to EndNote by clicking the three-dot menu to the right of each item and selecting "Export to" and then "EndNote".
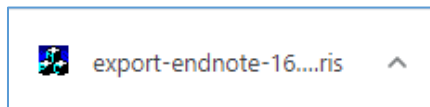
- You can save multiple items at once by clicking on the bookmark icon to the right-hand side of each result.
- After saving the items you want, click on the saved items folder in the top right-hand corner to see all items you have saved.
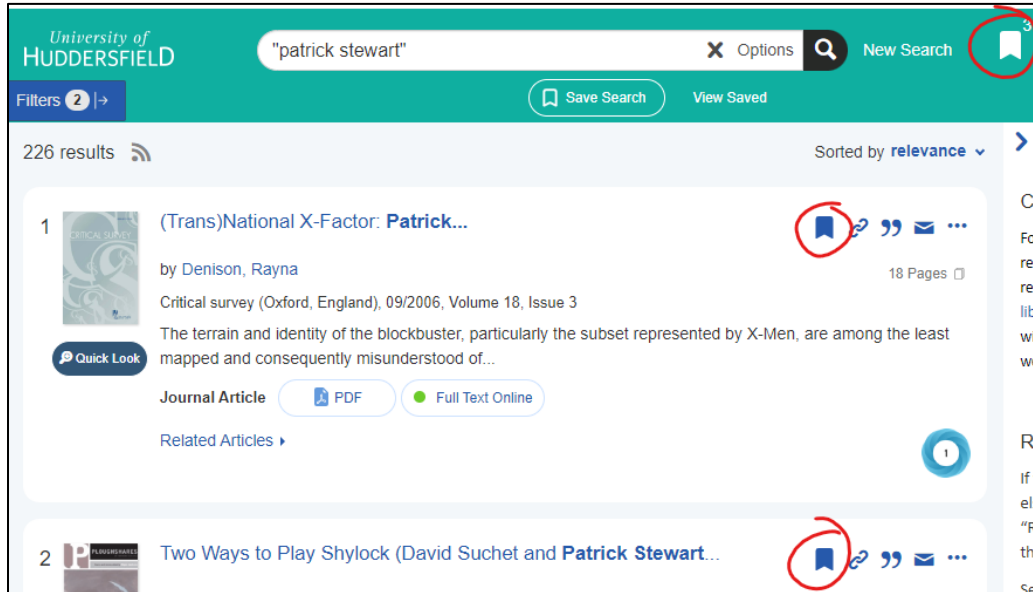
- From the **Export To...** drop down menu choose **EndNote.**
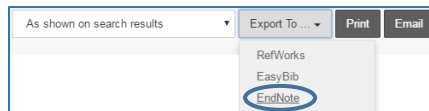
- A file download box will appear (this may appear in different places, e.g. at the top or bottom of the screen or as a pop-up, depending on which browser you are using). Double click to open the file in EndNote.
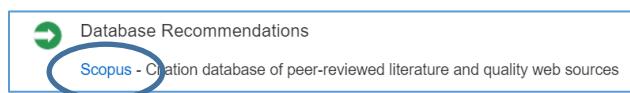

- EndNote will automatically re-open and you will see the imported references in your Library.

3.3.2 Adding references from Scopus

The next exercise demonstrates exporting from Scopus, which is a key multi-disciplinary resource available at Huddersfield. For help with exporting from other resources (see full list), contact the library on library@hud.ac.uk.

- Return to the Summon homepage and type **Scopus** into the search box.
- Select the link to **Scopus.**

- If prompted to log in, use your university username and password.
- Do a search in Scopus and click in the boxes next to the relevant title to select 6 items to export.
- Click on **Export** from the top menu.
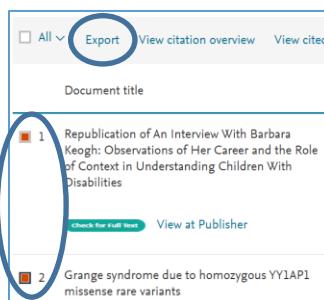
- Select RIS format and Abstract & keywords then Export.
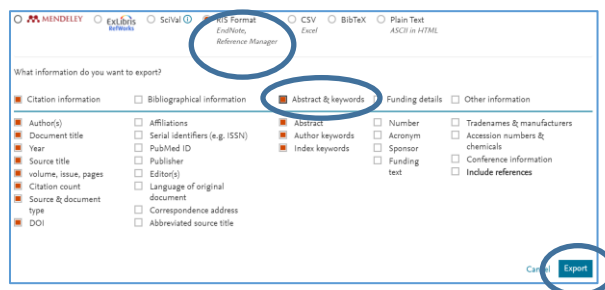
- A file download box will appear (this may appear in different places, depending on which browser you are using). Double click to open the file in EndNote.
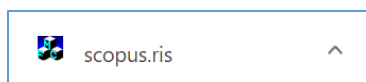
- EndNote will automatically re-open and you will see the imported references in your Library.

3.3.3 Tips on exporting to EndNote from various sources:
- EndNote is compatible with most electronic resources to which we subscribe, see the full list.
- You can also use it with Google Scholar although it does restrict you to importing one reference at a time. The quality of the reference will vary, so ensure you check it for accuracy.

- For help with downloading from other resources, check each resource's help pages or contact the library on library@hud.ac.uk.

3.4   Amending and manually adding references

It is important to proof-read all imported references, as there can be missing data or errors in the original input process.
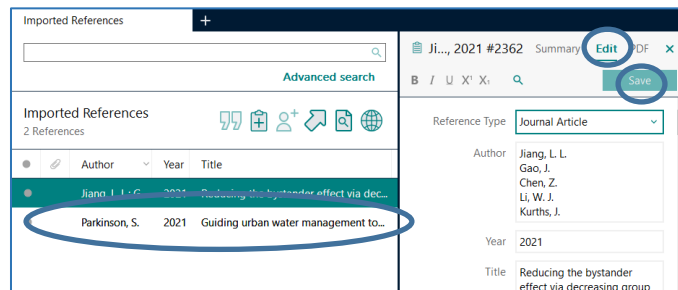
3.4.1   Amending a reference

To amend a reference in your library, click on the item you want to edit. The right-hand panel will display the full detail, click on **Edit** at the top of this panel. The various fields are then visible to edit.

Some fields may turn red (author and journal) to indicate this is the first instance of that name. This helps ensure consistency of name spellings, e.g. Khan, S. K. could also be listed Khan, Sudheer or Khan, S.

You can scroll down to the **Research notes** field and add your own comments/ tags if you wish. These are then searchable in EndNote.

Once you have edited the reference, click on **Save** button at the top of the panel.

3.4.2   Manually adding a reference

Sometimes you might have a reference you cannot locate in Summon or Scopus, e.g. a website, a live performance or a printed leaflet. EndNote has a number of templates from which to choose.

- To manually add a new reference to your library either click the "New reference" button (see image, right) or select **References** and click **New Reference** (Control + N shortcut) from the toolbar.
- A pop-up window will appear with a blank template to manually type in the reference information to each of the fields.
- You can use as much or as little detail as you want. For an APA 7th reference, the minimum information needed is author, year, title, and some additional fields depending on source type. See below for details of the additional information required for the most common source types:
    - Book: Publisher, Edition (if not 1st), and URL or DOI (if an ebook).
    - Webpage: URL.
    - Journal article: Journal, Volume, Issue, Pages, DOI (or URL if there is no DOI).
- The default type is Journal Article. For this exercise, choose **Web Page** from the Reference Type drop down box.
- Complete the template with the following details:

- o Author: **The Climate Coalition,**
  (this may appear in red, see tip below)
  - o Title: This report comes with a health warning
  - o Year: **2021**
  - o URL: **https://www.theclimatecoalition.org/health-report**
    (NB. You will need to scroll down in the template to find the URL field).
- Click on **File** then **Save** from the top menu.
- Close this reference by clicking on the small x in the top right-hand corner of the box.

3.4.3 Tips on manually adding references:

- If there is more than one author, use the return key between author names.
- Authors can be entered in the format Anjum, F. M. or Faqir Muhammad Anjum.
- Organisations' names must be followed by a comma e.g. Department of Health, otherwise EndNote will assume the last word is an author's surname and your citations will appear as (Health, 2005) instead of (Department of Health, 2005).
- Red text indicates a name which has not been entered into a particular EndNote library before.
- You need to enter your references in the case (i.e. capital letters or lower case letters) in which you want the citations to appear (e.g. Bloggs, Jo C. not BLOGGS, JO C., or bloggs, jo c.).
- A digital object identifier (DOI) is used to uniquely identify an object such as an electronic document. APA 7th (the University approved referencing system) requires a DOI to be added to a journal article reference if available.

Section 4: Changing the referencing style

EndNote has a wide range of referencing styles to choose from, and the default is usually set to Annotated. The university's approved standard is APA 7th, compiled by the American Psychological Association. Some taught courses may use a different style, please check with your lecturer if unsure. If you are a postgraduate researcher you may choose any referencing style, in agreement with your supervisor.

- Double click on any reference to view the side panel.
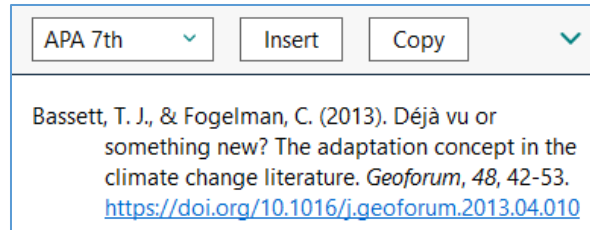- Check you are in the **Summary** tab.

- Underneath the reference details you will see another box you can maximise by clicking on the upward arrow.
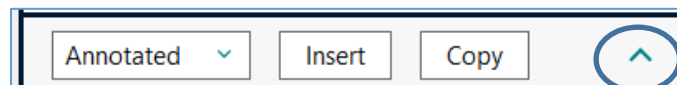

- Select APA 7th from the first box. You can choose **Select another style** if this or your preferred style does not appear in the list.
- Click on the arrow to enlarge the box and see a preview of the reference.

Bassett, T. J., & Fogelman, C. (2013). Déjà vu or something new? The adaptation concept in the climate change literature. *Geoforum, 48*, 42-53. https://doi.org/10.1016/j.geoforum.2013.04.010

Section 5: Using groups to organise references

EndNote has a feature called **groups** to help organise your references. You can organise by topic, thesis chapter or assignment/module, as you prefer.

- Click on **Groups** then **Create Group** from the top menu. Alternatively, you can right click on **My Groups** in the left-hand menu.
- Double click on the **New Group** and rename it as appropriate.
- Add a second group in the same way.
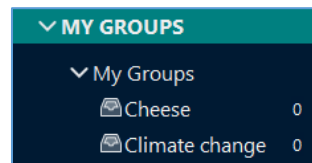
- You can then either drag each reference into the group, or right click on the reference and select **Add References To** and then select the relevant Group.

5.1   Tips on using groups:
- The same reference can belong to more than one group.
- You can always see **All References** by clicking on the option at the top of the left-hand pane.
- Smart groups allow you to automatically add references to a group if they meet specific criteria, e.g. keyword or author name. This option is accessed from the **Groups** menu on the top toolbar.

## Section 6: Using EndNote with Word

In addition to storing and managing your references, EndNote allows you to automatically insert in-text citations and create a bibliography in Word.

When EndNote is installed, a toolbar is added to Word which allows 'Cite While You Write' to be used to cite references from EndNote in Word documents.
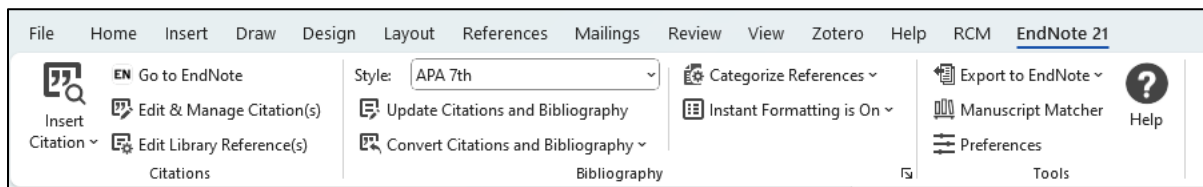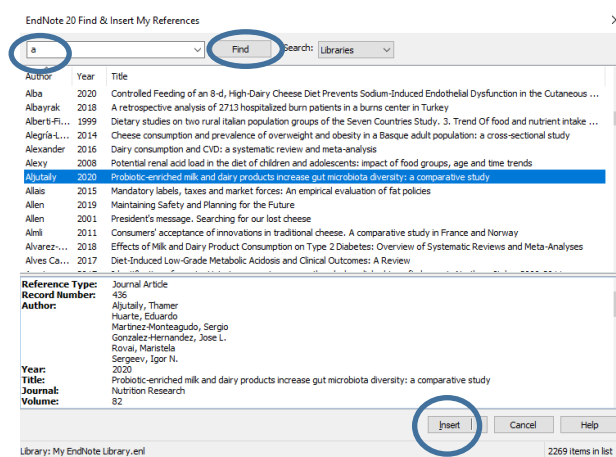
6.1   Adding citations and formatting a bibliography in Word

- Minimise your EndNote library and open Word. Type a few sentences into the document – just make something up!
- Click the **EndNote 21** tab in the Word toolbar.
- Choose a point in your text where you wish to add a reference.
- Click on **Insert Citation** from the EndNote toolbar and select the first **Insert Citation** option.
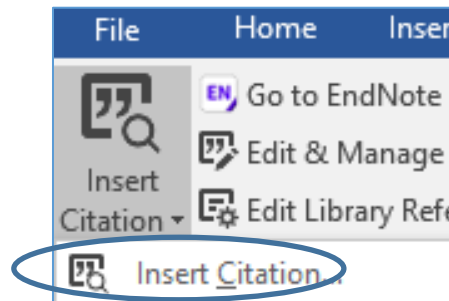

- Type the letter **a** in the search box and click on **Find**. This will show a list of ALL references you have in your open EndNote library.
- Click on the reference you wish to add to your Word document, then click **Insert**.

- The reference you selected should automatically be inserted into your Word document (as a citation) and the full reference will be towards the bottom of the page (starting a bibliography).

6.1.1   Tips on adding citations via the Word plugin:

- Instead of typing "a" for all citations, you can search by author/ keyword.
- When inserting a reference, you can use the drop-down menu to amend how the citation displays.
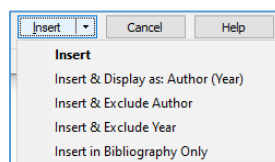
- Alternatively you can return to your EndNote library, highlight the reference/s you want to insert and return to Word to select **Insert Selected Citation(s).**
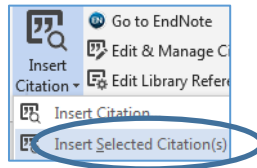
## 6.2   Editing citations in Word

Once citations have been added to your Word document you may wish to edit them. You may need to include page numbers (for example if you have used a direct quote), or you might want to exclude the author (for example when the author's name appears as part of the sentence, e.g. "Jones (2013, p.5) suggests that…").

This can be done using the **Edit & Manage Citation(s)** option in the EndNote ribbon of Word.
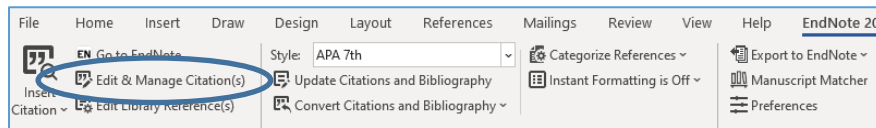

6.2.1   Adding page numbers to your citation

- Highlight the citation (it will appear greyed out), and on the EndNote tab in Word click on **Edit & Manage Citation(s).**
- In the pop-up box, enter the page number in the **Pages** section (if you want to add multiple pages use a hyphen between numbers, e.g. 5-7).
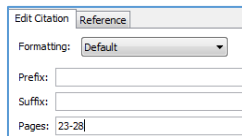
6.2.2   Excluding author/year from your citation

- Highlight the citation (it will appear greyed out) and on the EndNote tab in Word click on **Edit & Manage Citation(s).**
- A pop-up box will appear, click on the **Formatting**: drop down menu. From here select the option you want to apply to the citation:
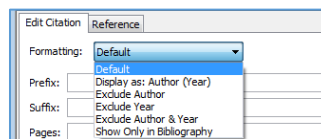
- Click **OK** and the citation will automatically change to exclude author OR year as selected.

6.2.3   Tips on editing citations:

- The author/year is just hidden and can be retrieved by highlighting the citation, clicking on **Edit & Manage Citation(s)** and selecting the **Default** option.
- As well as changing the referencing style within your EndNote library, you can also change the style within your Word document (this will not affect the style in EndNote).
- On the **EndNote** tab in Word, click the drop-down arrow next to **Style** and **Select Another Style**.

Section 7: Managing PDFs and attachments in EndNote

There are various ways of managing PDFs/ file attachments within EndNote. There are three main options, depending on where you are in the research process.

7.1   Adding PDFs to EndNote records

After you have downloaded a journal article reference into your Library, you can use EndNote to locate the PDF of the full text through the Library's electronic journal subscriptions.

- In the top menu click on the **Find Full Text** icon . EndNote will search the University of Huddersfield's subscriptions and pull in the full text PDF, if possible.
- You may be asked to log in with your university log in and password. Then click on Continue (twice) and the box will disappear.
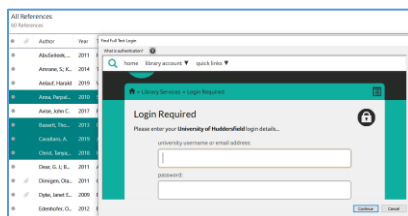
- Click on **OK** and EndNote will start searching for matches.
- You can check the success rate on the left column and the PDFs will be attached to the relevant records (this will be indicated by the paperclip icon in the column next to the author name).
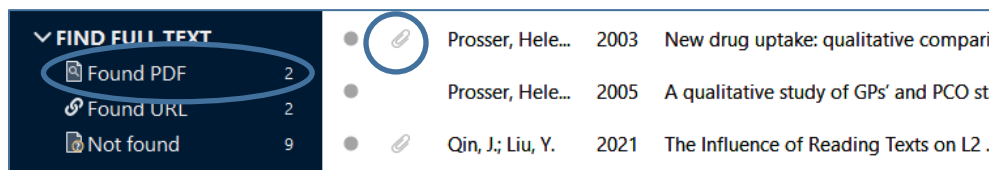

- This method may not find every full-text PDF available. Success rates vary depending various factors, including the age of the paper. You may need to download the PDF from the journal site and follow the instructions in section 7.2, below, to link it to the EndNote reference.

7.2   Attaching a PDF to a reference

If you have downloaded a journal article reference into your Library, and you also have the PDF of the article saved, you can attach this to the record in EndNote. To link and save the PDF into your EndNote library:

- Double click on the reference in your EndNote library to which you want to attach the PDF.

- From the Summary tab on the right-hand side, click on **Attach file.**
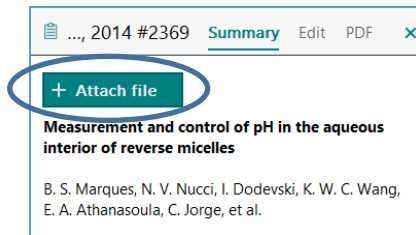
- A pop-up box will open so you can locate the PDF on your computer/ device.
- Click on **Open** and the PDF should now appear above the title of your reference, in the right-hand section of your EndNote library. You can add multiple files if required.
- To save the changes, simply click on another reference and EndNote will prompt you to save.

## 7.3   Extract reference from existing PDF

If you have already downloaded the PDF of the full text on to your computer, you can add it to EndNote and import the reference at the same time. If you have already collated a lot of research, this exercise can save you time.

Windows instructions:
- Click on **File**, go to **Import** and select **File** (for one PDF) or **Folder** (for multiple PDFs).
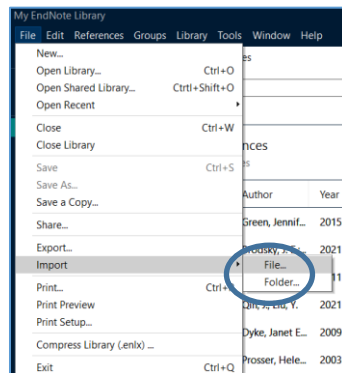

- Click **Choose** and then search for the file/s on your device which you want to save to EndNote.
- Check the **Import Option** is set to **PDF** and click on **Import**.
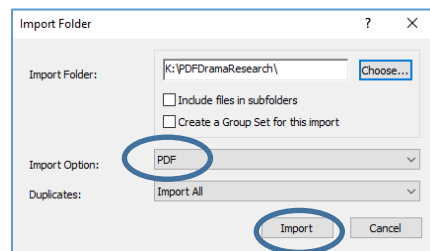
Mac instructions:
- Click on **File**, click on **Import**.
- Search for the file/s on your device which you want to save to EndNote.

- Click **Options** to select the format type for the file you want to import. Ensure this is set to **PDF** and click on **Import**.
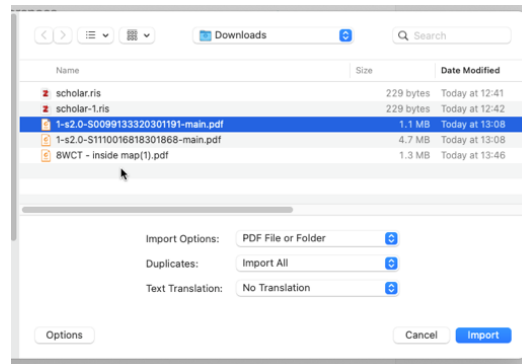
- EndNote will attempt to extract the information from the saved articles to create new references in your Library with the PDF attached (See Hubbard example below).
- If EndNote cannot extract the data (See example below), you will need to manually add the reference details from the PDF. See Section 3.3 on amending references for help.

		Author	Year	Title	Ra...	Journal	Last Upd...	Reference T...	Reviewed It...
●	🖉	Hubbard, Phi...	2019	Walking a lonely path: gender, landsc...		Cultural geographies	21/07/20...	Journal Arti...	
●	🖉			<Barkham2019.pdf>			21/07/20...	Journal Arti...	

Section 8: Saving, backing up and moving your EndNote Library

We recommend syncing your EndNote Library to EndNote Online every time you close down the desktop app. This ensures a backup on their cloud server, from which you sync to when moving between different computers (e.g. home to work device) or sharing a library with a fellow researcher.

If you do need to save or move your EndNote Library on to another device (e.g. USB stick, external drive or another computer), please remember there are **two** files to copy. Both will have the same name.

- The EndNote Library file is the main file which contains all of your references.
- The .Data folder contains any PDFs you have saved in the Library and also style changes you might make to the referencing styles.
- If you copy one without the other, or rename one so the names no longer match, EndNote will not be able to read your library.

8.1   Tips on backing up your EndNote library:

- EndNote libraries must not be saved on a cloud service, like OneDrive, Google Drive or Dropbox, as they are likely to get corrupted over time.
- However, backups of the library created via **Tools/ Compressed Library** can be stored on cloud services and this a good way to ensure you have a backup available at any time.

Section 10: Where can I access EndNote?

The University holds a site licence for EndNote so it:

- is available on all University PCs.
- can be installed on any University-owned laptop on request.
- can be installed on your home computer. It is free for all current staff and students to download from the [software purchasing page](). Please note that this EndNote license agreement is for academic use only, and you must uninstall the application when you graduate/leave employment of the University.
- before graduating, you could buy a student licence personal copy for further use from the [EndNote site]().

Section 11: Further help

We highly recommend using the Help section within EndNote as it is very comprehensive.
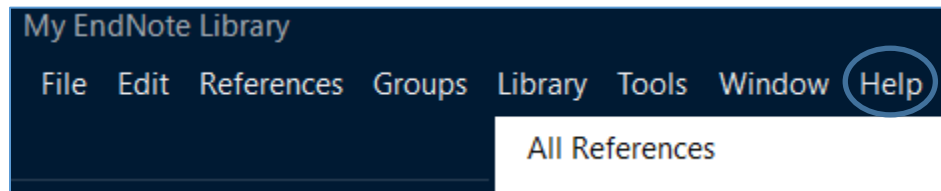
For further support, you can contact the Library on [library@hud.ac.uk](), or [book an online appointment]() to speak to a librarian.

We also recommend the following websites:

- Our [library web pages]() (including a link to this document).
- [EndNote training videos]() (via supplier's YouTube channel).
- [EndNote user guide]() (from supplier).
- The [EndNote website]() which includes a [styles to download section]() offering 6,000 bibliographic styles.