EndNote Desktop Instructions

This guide will take you through the various aspects of using EndNote Desktop.

Contents

Downloading EndNote Desktop

EndNote Desktop is now available to use on your own device. You will first need to download the software to your PC or Mac. Staff and Students can download a copy from the Software Download Centre - https://www.mmu.ac.uk/about-us/professional-services/itd/software/ Here you will find the software and the relevant product key. Please note if you are on a MMU device, the software can be added from either Software Centre/Company portal.

Please note if a referencing style you need is not included with the initial download of the software you can download additional styles from our EndNote guide.

Creating a Library

To start using EndNote Desktop you first need to create a file called a Library to store your references. It can include lots of different reference types i.e. books, journal articles, conference proceedings, etc.

Open the EndNote software. The choose Create a new library.
Please note on a Mac just the top message bar will appear, you will need to Select File and new.
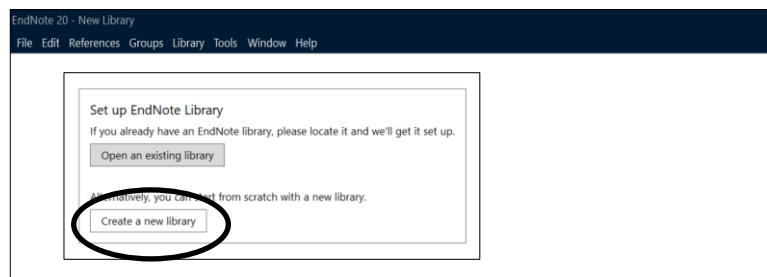
A default file called My EndNote Library will be created. You can change the name of your library if you prefer. Then click Save.

EndNote libraries are made up of two parts .enl file and a Data folder. Ensure both parts are kept in the same location, as both are needed for EndNote to function correctly.

Please note your EndNote library needs to be saved to a location such as a hard drive. EndNote libraries should never be stored in cloud syncing folders such as Drop Box, One Drive, iCloud, etc as syncing may lead to data corruption over time.

If you want to back up your data then Endnote has the option to create a compressed file, choose File, Compressed Library (.enlx). Leave the options as given, then select Next. You can specify a location for the file and then click Save. This will create one file containing all the data from your library of references.

It is advisable to regularly create a backup. Each time you create a new compressed library, it is recommended you replace the earlier version, so you avoid confusion as to the latest version. You can also sync your library with EndNote Web to provide an added backup.
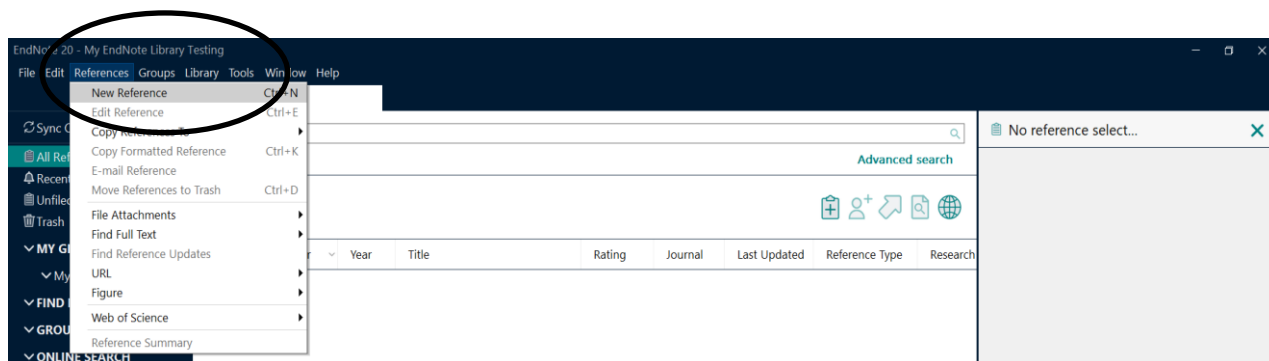
The Reference Library

The file that holds your references is called a library. It can include lots of different reference types i.e. books, journal articles, conference proceedings, etc.

References are displayed in a list within the central panel and can be previewed on the right-hand side of the screen.
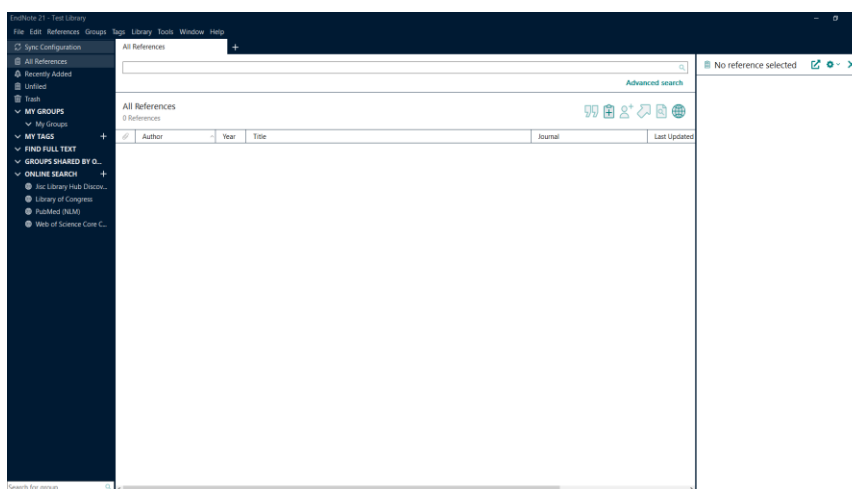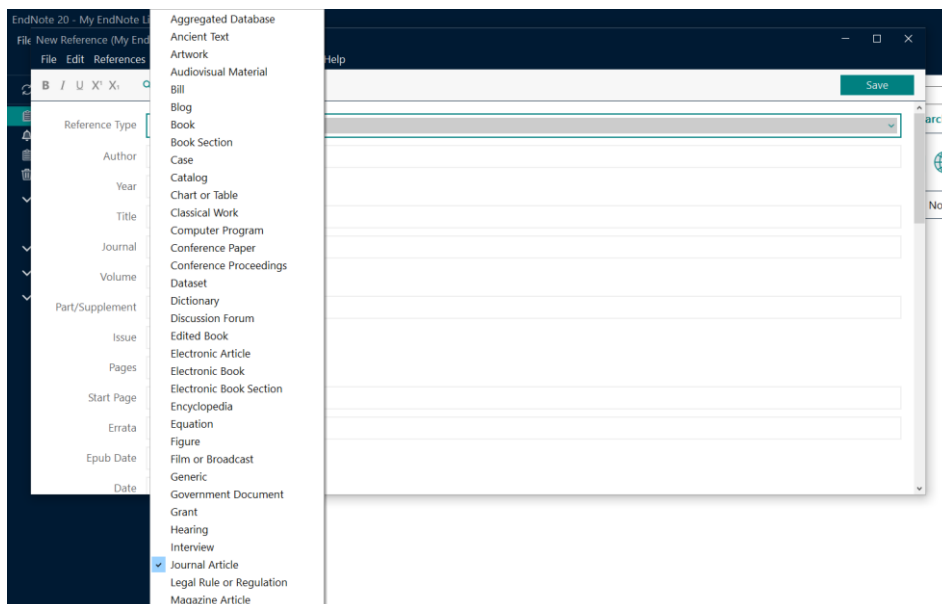

Manually adding references

To manually add a new reference, you can select References and then choose New Reference.

Or you can click the clipboard icon, found above the reference list

A new window will appear. First select the type of reference you require from the drop-down menu. Reference types are listed alphabetically, scroll up or down to find the one you need.

The fields will change to reflect the reference type, click in each relevant field, and enter the details of the reference.

Tips for entering authors

When entering the names of authors or editors always use the following order, Last Name, First Name i.e. Smith, John. If the reference includes multiple authors/editors, each must be entered on a separate line.
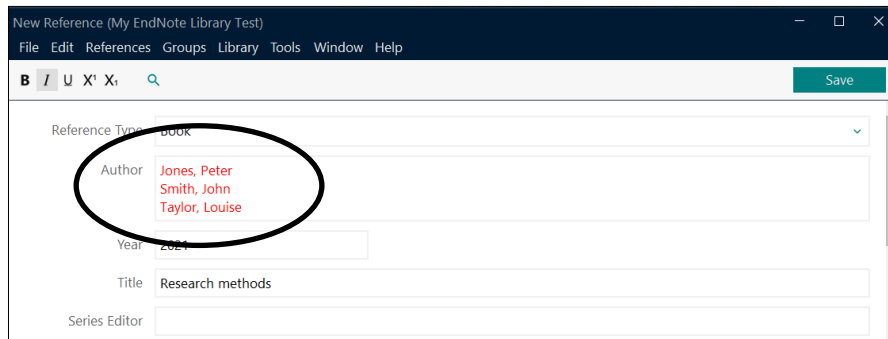
If the reference includes the name of the organisation as an author, you need an extra element so that it will display correctly. You need to insert a comma at the end of the organisation's name i.e. Manchester Metropolitan University,
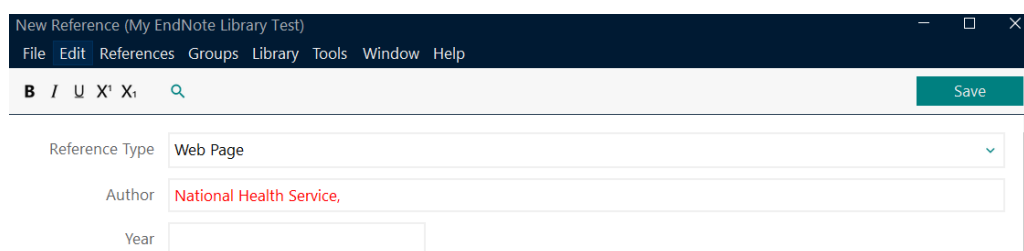

When you have entered all the relevant details, click Save. This will add the reference to your library. You can now close the New Reference window by clicking on the cross in the top right-hand corner of this box.

Preview your references

To see how your reference might appear in your chosen referencing style, it can be seen in the preview panel. On the bottom right-hand side of the screen is a preview panel. If the preview panel is not visible, hover over the black line above the style name and drag the line upwards.

To preview a reference, click to highlight the reference you want to check. You will need to select a relevant referencing style. Click the drop-down arrow next to the style name, only a limited number will be displayed. Choose Select Another Style to access the full list. Scroll down and choose the style you want, and your reference will preview in this style.
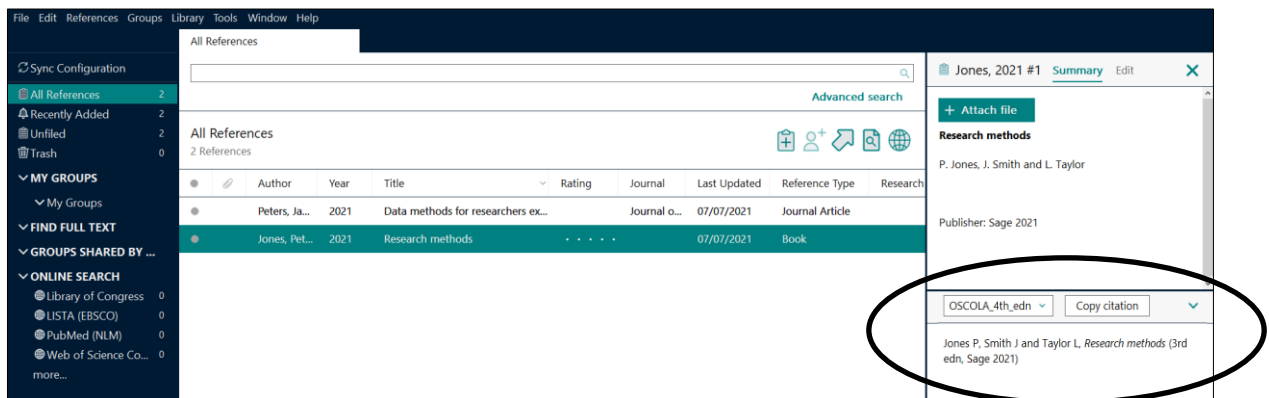
Editing references

Each reference can be edited. You can do this in several ways.

From the list of references in the central panel, click on the reference you want to edit. Then go to References at the top of the screen and choose Edit Reference.

Alternatively, you can click to highlight the reference you want to edit. Then on the right-hand side of the screen choose Edit


The reference window will open, and you can amend information by typing in the relevant field/s. Once you are happy with your edits click Save. You can click Summary to return to the previous view.

Adding attachments to references

EndNote Desktop allows you to attach files such as PDFs to individual records.

Click to highlight the reference you want to attach a file to. Then you can either click References, select File Attachments then Attach File. Alternatively, on the right-hand side of the screen click PDF and then Attach file.
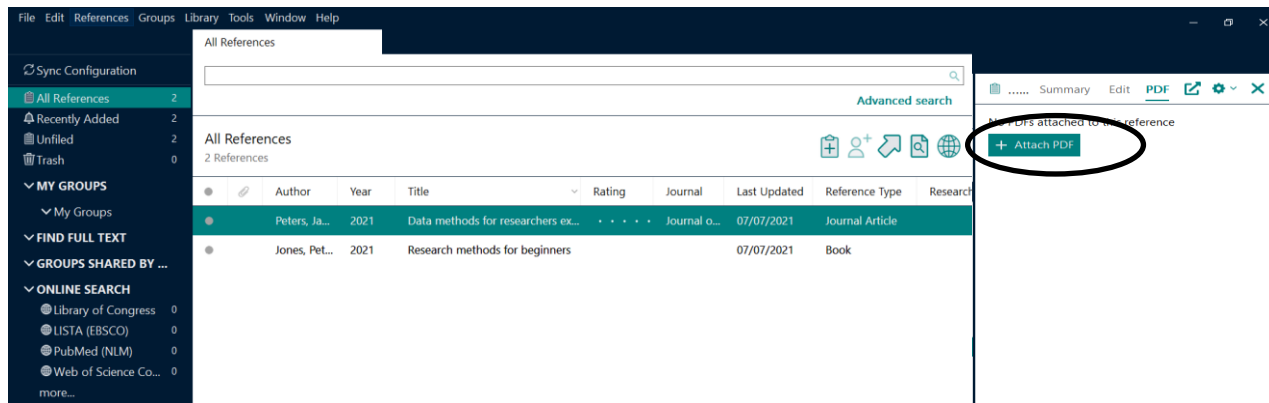
Locate the file and click open and the PDF will appear.

To access the PDF, you can either click the PDF link from the Summary window or click PDF at the top in the right-hand pane. EndNote Desktop allows you to either highlight text within the PDF or add sticky notes to relevant pages of the PDF. These tools can be accessed when viewing the PDF document.

Once a record has an attachment a paperclip symbol will appear next to the reference in the main reference display.

If you already have PDFs stored on your computer then they can be imported into EndNote, alongside the reference details. Choose File, Import then select File for individual items or a Folder if your PDFs are stored in one location. Next choose the location of the File or Folder. You then need to click the drop-down arrow next to Import Option and select PDF. Then click Import. Your PDF/s will be added.

Please note, if your imported PDFs do not have a DOI, only the PDF will be added and not the reference details. You will need to manually add these details.

Deleting references

To delete any unnecessary records, click to highlight the record/s you want to remove and then drag and drop into the Trash folder.

If you need to reinstate a reference, then first click on Trash to view deleted items. Next click on the item you want to retrieve. Next click the bin icon with an arrow on the front and this will move the reference back to All References list.
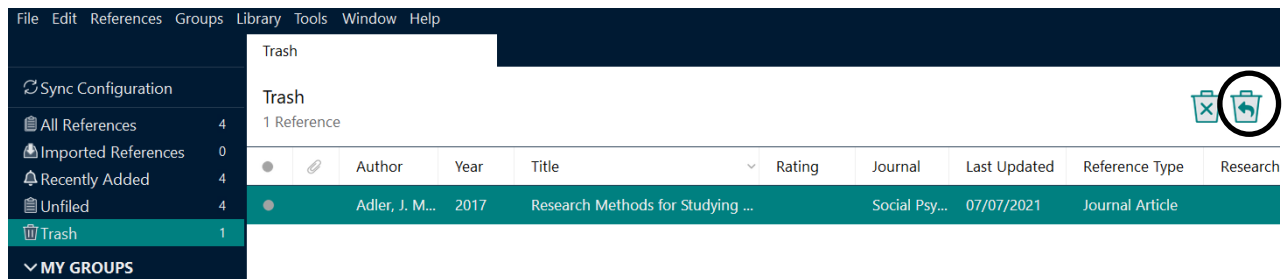
If you no longer need these items, click on the bin icon with a cross on the front and all items in the trash will be permanently deleted.
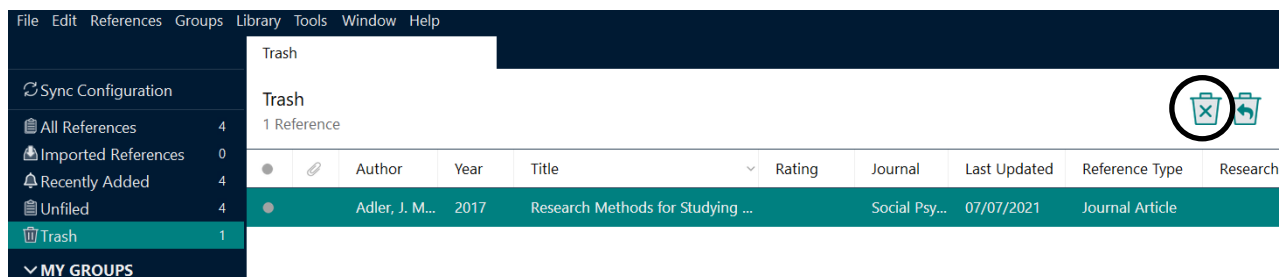

Removing duplicate references

If you are downloading many records from different sources, you may find that you end up with duplicate references in your library. EndNote has a handy tool to find these for you.

Click on Library then select Find Duplicates.

Duplicates references will be shown. A Find Duplicates box will appear, and you can select which version of the reference you want to keep by clicking on the Keep this Record button. The duplicate will automatically be removed and added to the Trash folder. If you want to keep both examples, choose Skip and you will move onto the next example.

Please note EndNote will only highlight references which are exact matches.
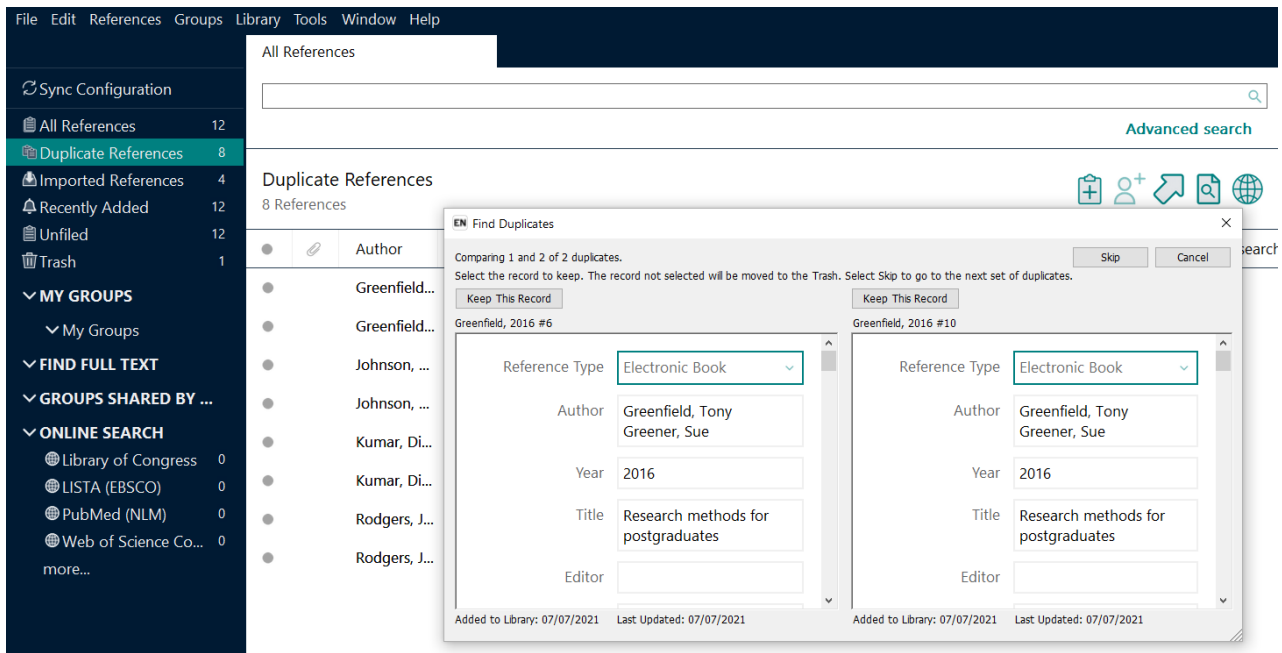

Reordering the library

Your EndNote library can be organised in a number of different ways. The default is to order by the name of the first author. However, by clicking on one of the fields above the references, EndNote will re-sort records by Year, Title, etc.
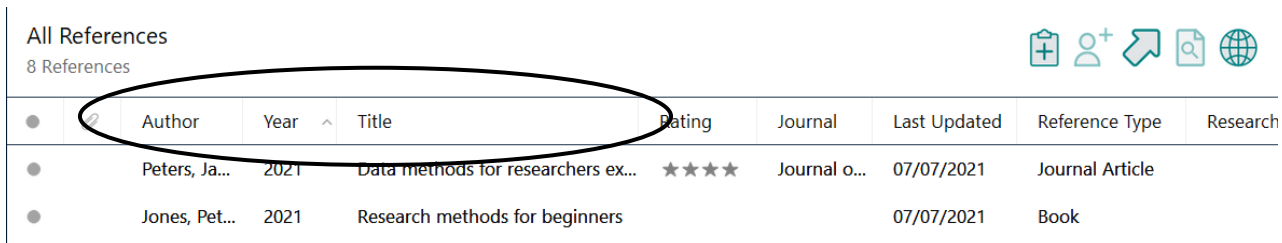
To customise the display further choose Edit and then Preferences. Then choose Display Fields and you can select any elements you want to change. Then click OK and any change will now be displayed on screen. To return to the default display, go back to this screen and select EndNote Defaults and click OK and this will restore the original settings.
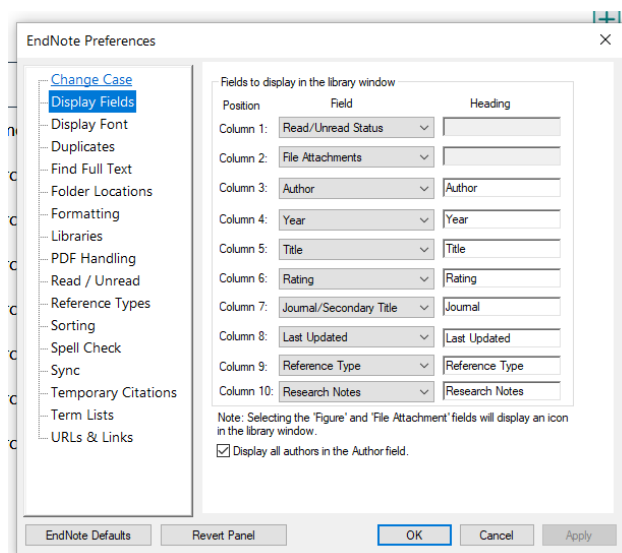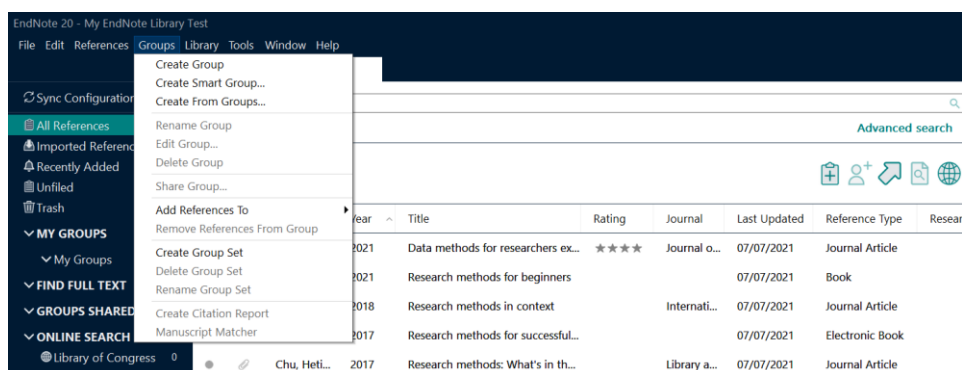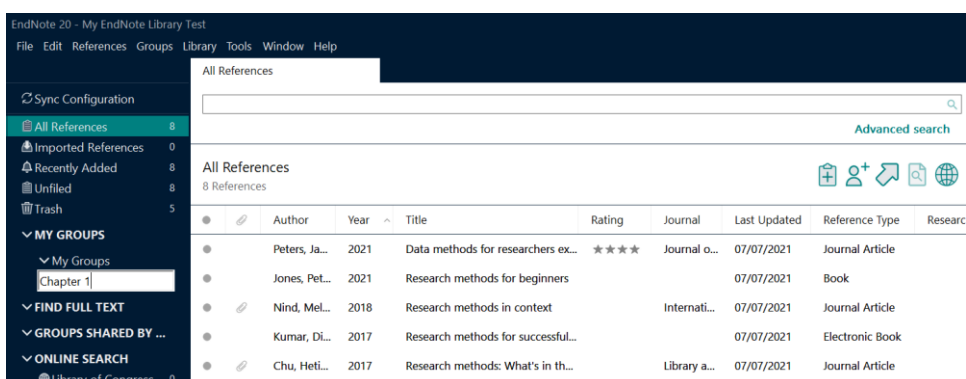
Grouping your references

Records are automatically added to an All References group – but you can also create your own folders to organise your references further.
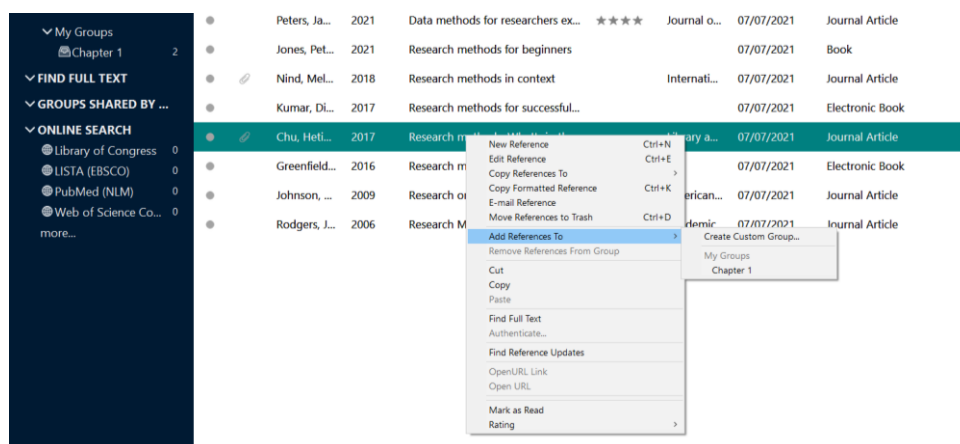
To create a new group, select Groups and then Create Group.

The new group will appear under My Groups. You will need to give the group a name i.e. Research Methods, Chapter 1, etc.

To add references to a group you can click to highlight reference/s and then drag and drop to the relevant group or highlight a reference/s and right click and then select Add Reference To and select the relevant group.

EndNote Desktop also includes a feature called Smart Groups. These are dynamic groups of references which update automatically using selected criteria.

To create a Smart Group, select Groups and then Smart Groups. A search box will appear. You can choose a name for your new Smart Group.
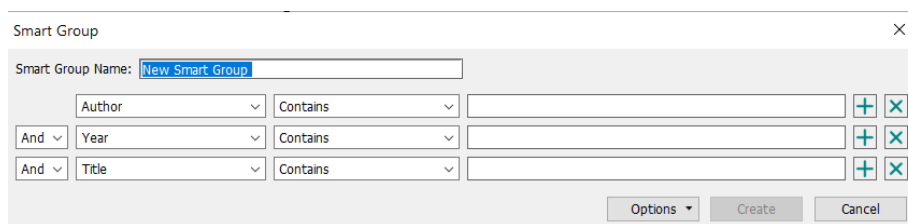
You can now set certain criteria for your group such as particular keywords, authors, ratings, reference types, etc. When you have set your criteria click Create. Your group will now appear in the left-hand menu. Every time references are added which fit your criteria they will automatically be sorted into your smart group.

Please note that references can appear in multiple groups.

To remove references from a group, click on the group and click to select the reference/s you want to remove. Right click and select Remove references from the Group. A confirmation will appear, select Yes and the references will be removed from this group. Please note they will remain as part of your library of references and can be seen if you click All References.

Tagging your references

You can also colour references by using tags. Seven different customisable tags are available. Once records are tagged colours are shown in the central panel. Multiple tags can be added to records.


To create a tag, you will need to go to the Tags menu located at the top of the screen and select Create Tag. Alternatively click on the plus symbol next to My Tags in the left-hand pane. Create a name for your tag and select a colour, then choose Create Tag. The tags automatically appear under My Tags in the left-hand pane.

You can assign tags to record in several ways. Select the reference/s you wish to tag, then drag them to the appropriate tag in the left-hand pane. Or select a record, right click, and choose Manage Tags and then select the relevant tag/s and click OK. You can also select a record and in the right hand-pane, choose Edit and then Manage tags, select the relevant tag/s, and click OK.
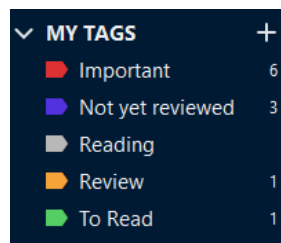
There are also several ways you can remove tags. Select a reference and right click, then choose Manage Tags. To remove one tag click the cross next to the tag and then click OK and this will remove the tag from the record. If you want to remove all the tags choose Clear Tags and click OK. You can also select a record and in the right-hand summary pane you will see the tags displayed. Click the cross next to the tag to remove the relevant tag/s.
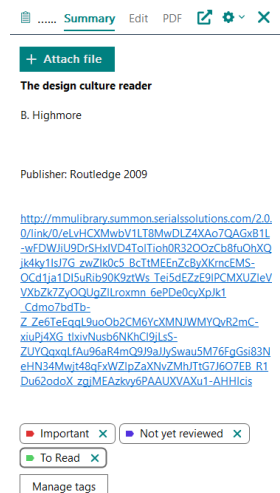
Searching your EndNote Library

If you want to find a specific reference in your EndNote library, then use the built-in search box. Type relevant search terms into the box and click Search. For more options click Advanced search. Click All References to return to the full list of references.
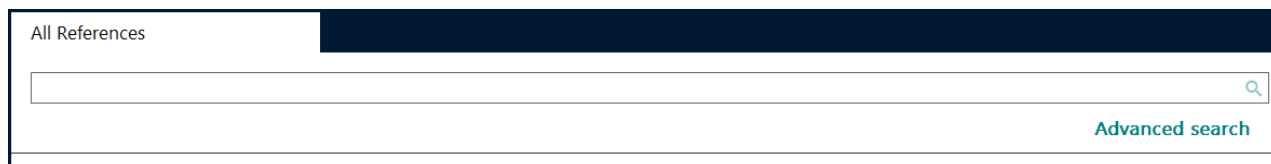
Syncing with EndNote Web

If you have an EndNote Web account, references can easily be transferred from EndNote Web into EndNote Desktop or sent from EndNote Desktop into EndNote Web. To use the sync option, you need to select Library and Sync. You will then be asked to enter the details of your EndNote Web account and click OK. The sync will happen automatically, and references will be updated across both platforms.

Getting References from Databases

It is possible to search many of the library's resources and then automatically add records into EndNote. The majority use a system called Direct Export.

Direct Export using Library Search

To use direct export, you need to leave your EndNote library running and open a browser. Access Library Search from the library website (www.mmu.ac.uk/library) and run your search. You can select multiple records to transfer into EndNote.

To do this click on the Save icon found on the right-hand side of each record.

Once selected, the icon changes and items will be added to the Saved Items folder found above the result list.
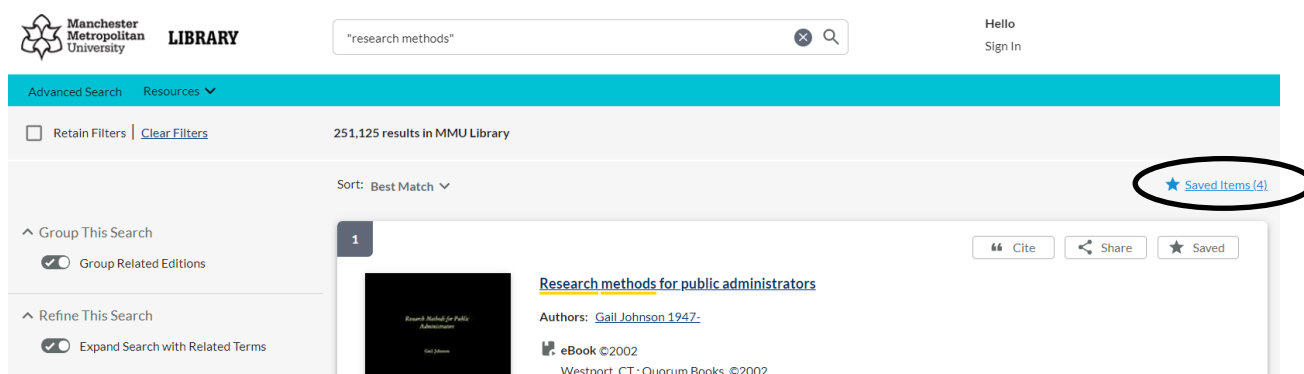
NB The selected records will disappear when you close the session, unless you have signed in to Library Search and chosen to save them to a folder.

When you are ready to transfer your results to EndNote, click on Saved Items above the result list.

A new screen will appear, listing the records to be transferred. To transfer click on the Cite button
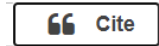
A new box will appear. Your do not need to select a citation style, just choose Export to EndNote.
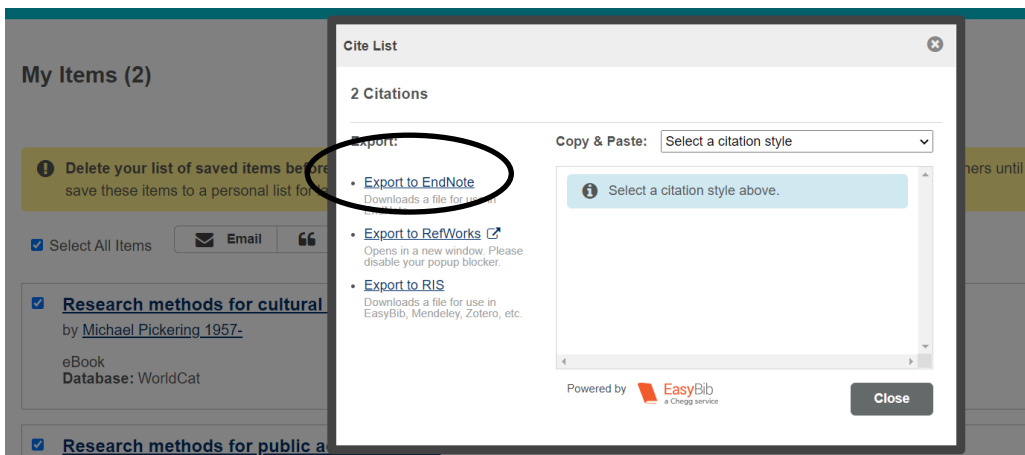
Depending on your browser, you may first need to click Save then either double click on the downloaded file or select open file near the bottom of your browser or select open with, then click OK.
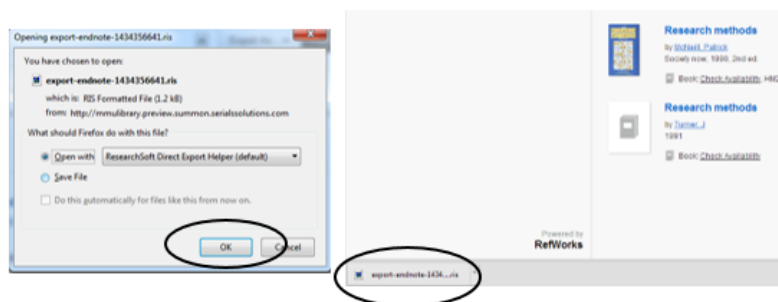
EndNote will open and only your imported references will appear in the window. Click All References to see your full list.
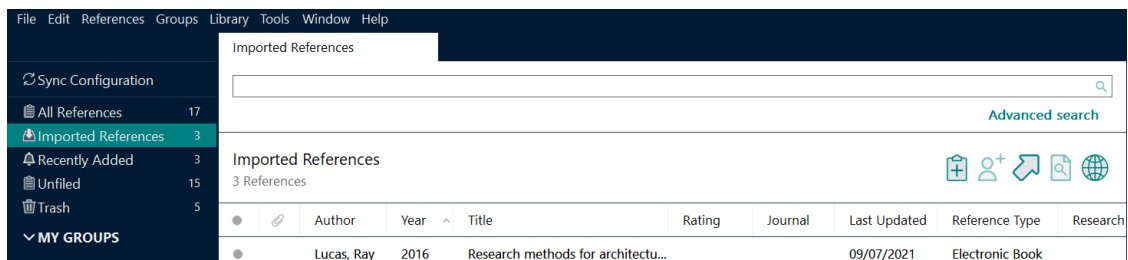
Further information about adding references to EndNote is available on our Adding references to EndNote page https://www.mmu.ac.uk/library/referencing-and-study-support/endnote/adding-references

# Using EndNote and Word

EndNote toolbar

When you install EndNote Desktop onto your PC or Mac then the Cite While You Write toolbar is automatically added to Word, which allows you to add citations to your document.
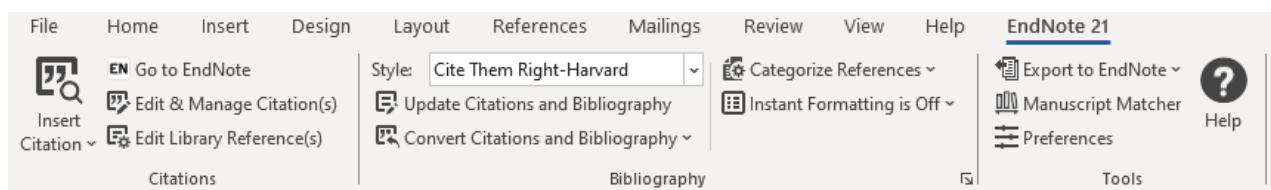

To ensure that it is working with Desktop, make sure that EndNote 21 is listed on the top of the tab. If it is not click on Preferences, then Application and select EndNote, then click OK.

Inserting a citation

Once connected to EndNote, you can start writing your text. When you need to insert a citation, place the cursor where you want the citation to appear. Next, click on Insert Citation on the EndNote toolbar.
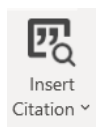
A search box will appear. You need to type in a word or name from the reference you want to add, then click Find. Results that match your search will be shown. When you have found the right reference click to highlight and then choose Insert.
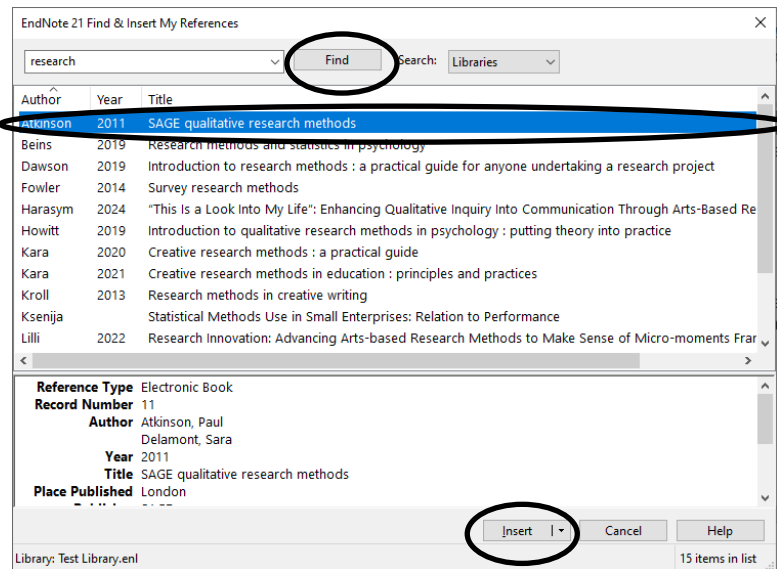
The citation will appear in the text and a reference list will be created at the end of your document. Repeat the process for further citations you need to add.

Setting the referencing style

To choose how your citations and reference list appear, you need to pick a relevant referencing style.

Please note if a referencing style you need is not included with the initial download of EndNote Desktop that you can download additional styles from the Library's EndNote guide. Instructions for adding this to the software are available on page 2 of this guide.

Next to Style on the EndNote toolbar select the drop-down menu. Only a limited number of styles are listed, if you choose Select Another Style, you can access the full list.
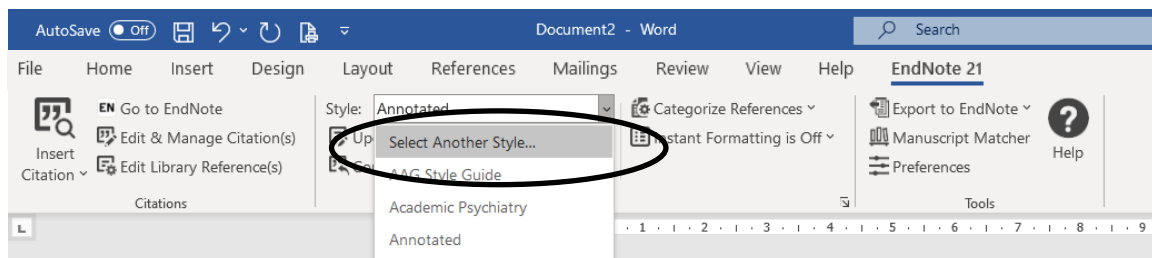

A new box will open, scroll down to the style you require, highlight, and click OK. Your citations and reference list will be reformatted in that specific style.

Deleting citations

If you want to delete or change a citation you need to do this using the functions on the EndNote toolbar. If you just delete them from your text, you can cause corruption of the data within your document.

To delete a citation, place your cursor in the citation you want to remove. Choose Edit & Manage Citation(s) from the EndNote toolbar. Then click the drop-down arrow next to Edit Reference and choose Remove Citation, then click OK.
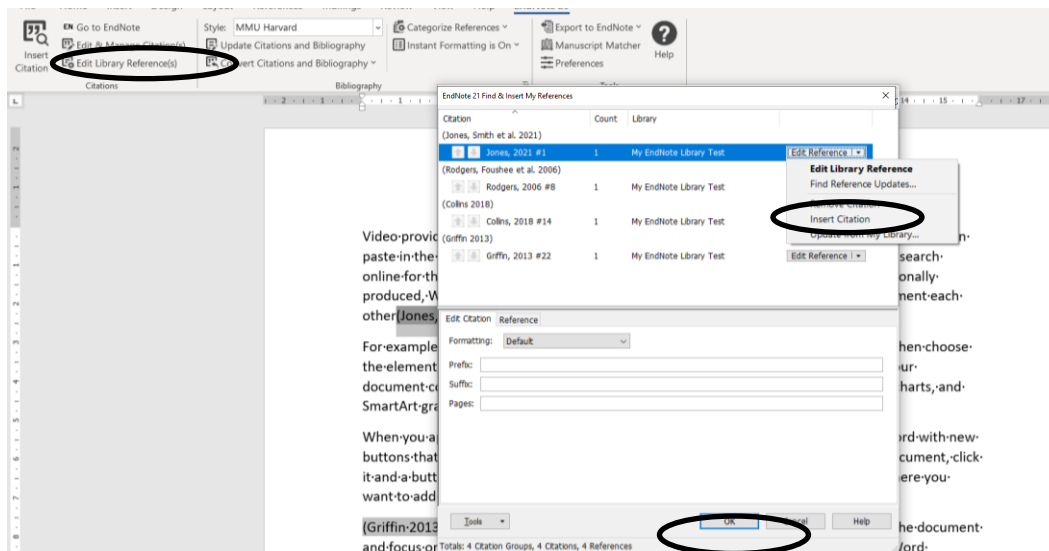
This will remove the citation from the text and the matching entry from the reference list.

Please note if you have used this source multiple times, you are only removing this citation. The source will remain in your reference list until all examples of the reference are removed from the document.

Excluding parts of citation

In some cases, you may want to use an author's name as part of the text rather than included within the citation bracket. You need to use EndNote to make this change.

First place your cursor in the citation you want to edit and then select Edit & Manage Citation(s) on the EndNote toolbar. Next select the drop-down arrow next to Default and choose Exclude Author. Only the year will now appear in the citation. You can now add the name of the author as part of the text.
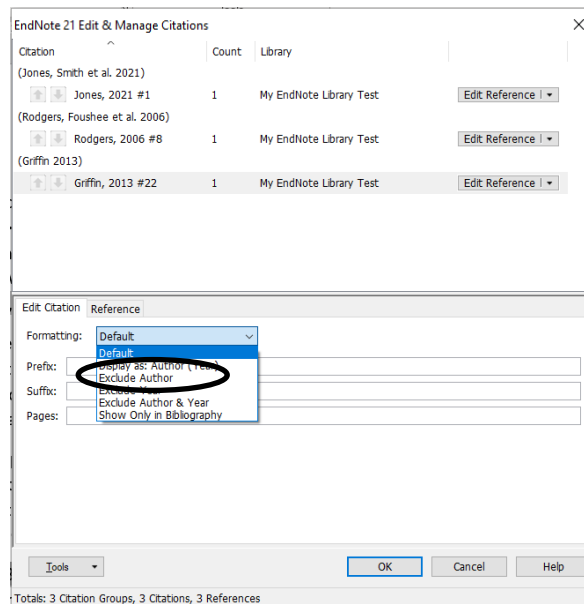
Including page numbers in a reference

If you need to include a page number as part of your reference as you are giving an exact quote, you can add this to your citation. First place your cursor in the citation you want to edit and then select Edit & Manage Citation(s) on the EndNote toolbar.

Check the correct citation is highlighted and then type the page number in the field marked Pages. Then click OK.
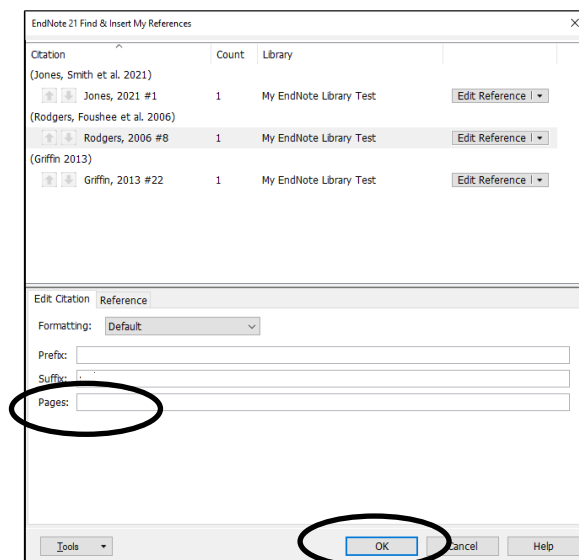

Editing citations/reference list

If something is appearing incorrectly in a reference in Word in either your citation or reference list, it is probably due to an error in the data in your EndNote library.

To amend this in Word, first return to EndNote. Check the reference, amend any incorrect details, and resave the changes. Next you need to update the details in Word. Place the cursor in the citation, choose Edit & Manage Citation(s). Click on the drop-down arrow next

to Edit Reference and select Update from My Library. The reference screen will appear, click Insert and then OK and the corrected reference will now appear in your document.
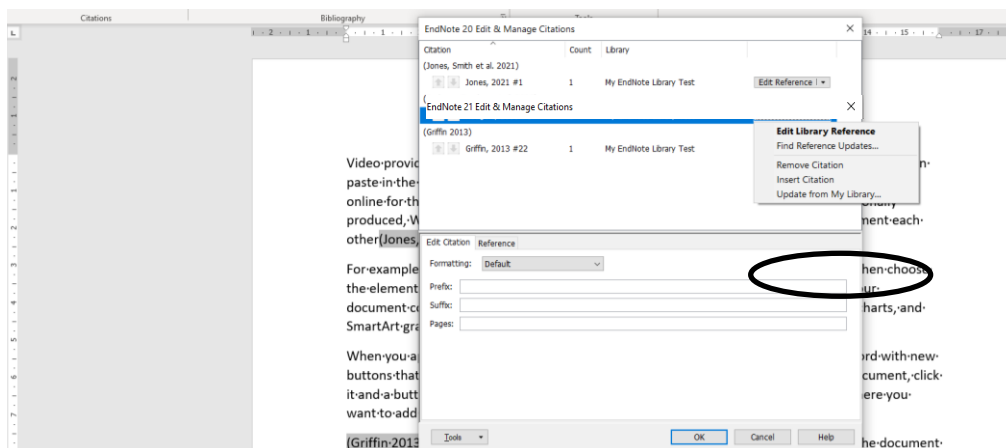
Submitting documents electronically

If you are intending to submit a document electronically, it is advisable to remove the active links between EndNote and your Word document and create a copy suitable for submission. It is advisable to make a copy of the document first, this way you will have a copy linked to EndNote and one that can be submitted.

On the EndNote toolbar in Word, select Convert Citations and Bibliography, choose Convert to Plain Text.
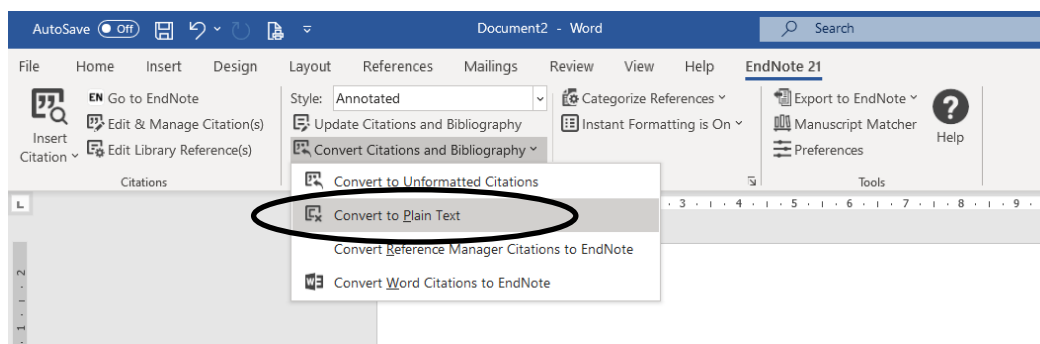
A message will appear asking if you would like to create a copy of the document. Ensure you have created a copy and then click Continue.

In the new version, all links to EndNote have been removed and it is simply a Word document. This version can be submitted electronically. If you need to subsequently edit the document, you will need to return to your original which is linked to EndNote, make the necessary changes, and repeat the process above.

Further help on EndNote is available on the library's EndNote guide:

https://www.mmu.ac.uk/library/referencing-and-study-support/endnote