

Getting started with EndNote 21 for PC

Downloading EndNote 21 on your Windows PC

- Go to [Endnote @ IT services](#) and follow the instructions once you've logged on with your Oxford Single Sign On. The previous version (v20) is also available so make sure you choose v21.

Creating and opening an EndNote library

1. Open EndNote from the **Start** menu or the search box (bottom-left of screen).
2. Once EndNote is open, click on **File > New....**
3. Name the file, e.g. 'Practice.enl', and **Save** it – you're now ready to start adding references.
4. If you've already created an EndNote library, click on **File** and then **Open Library...** to continue adding references.

Exporting and importing references

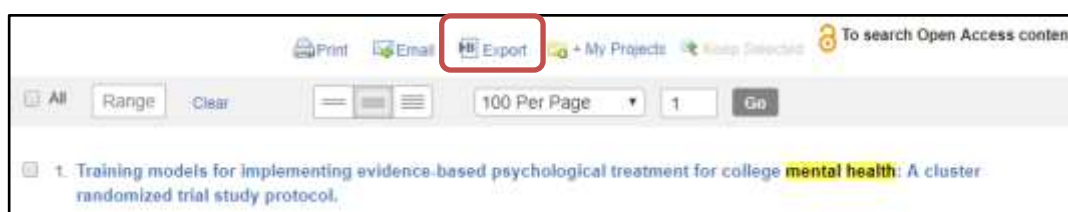
Exporting results from PubMed

1. [Conduct a search in PubMed](#)
2. Select the results you want to export by ticking their boxes immediately to the left of the article titles.
3. Just below the search box you will see **Send to**, which lets you send references to **Citation manager**.
4. By default, the system will create a file of the selected references; you can choose to export **All results** or **All results on this page**, if you prefer.

- Depending on which browser you're using and how it is set up, the downloaded file may be available in the bottom left of the screen. Click the file and your PubMed references should then be directly imported into your Endnote library. In Firefox, you'll be asked **What should Firefox do with this file?** Select **EndNote 21** (you may need to click on **Other...** first).
- If you don't see the file in the bottom left of the screen you can find it in your browser's Downloads menu and your computer's Downloads folder. Click or double-click the file to directly import the references into your EndNote library.

Exporting Results from Medline OvidSP (example of direct export)

- [On the SOLO homepage](#) under **Useful links** go to **Databases A-Z**.
- Type **Medline** in the **Search for Databases** box and click **Go**.
- Click on the link **MEDLINE (Ovid)**. This will open a new window.
- Conduct your search in **Advanced Search**. For this exercise deselect 'Map Term to Subject Heading' to search with keywords only.
- In the results, select some (if practicing, choose the first 20) by clicking in the box to the left of each reference. You can export up to 1000 references at a time.
- When you have selected your results click on **Export**



- Change the Format to **EndNote** and in Fields choose **Complete Reference**. Then click **Export**.
- Depending on the browser you're using and how it is set up, the file may automatically import into EndNote or it may just download, in which case click it to complete the import. If your browser asks **How do you want to open this file?**

choose **EndNote 21**. If prompted to choose an import filter you must choose the filter that corresponds to the database (and provider) you have been using. In this case **MEDLINE (OVID)**.

9. These new results will now also appear in your EndNote Library.

N.B. Note that your references are automatically imported into the library you have open. If no library is open you will be prompted to choose one.

Exporting results from Google Scholar

1. Go to [Google Scholar](https://scholar.google.com) and click on the **three horizontal lines** at the top left-hand corner:



2. Click on **Settings**.

3. Under Search results look at the **Bibliography manager** option, click on **Show links to import citations into...** and select **EndNote**.

4. Click **Save**.

Exporting individual references

1. Conduct your search in Google Scholar – for books, articles, preprints...

2. Each record displayed will have an **Import into EndNote** link. Clicking this will download a file, which will then import into EndNote when you click on it.

3. Depending on your browser you may be asked to choose which EndNote Library you wish to import the reference into. You may need to navigate to where your EndNote libraries are located (by default, your Documents folder). Choose a library.

4. The reference should now be in your EndNote library.

N.B. If you have other reference management software installed, clicking on ‘.ris’ or similar reference export files may import them into the other software, rather than EndNote. To

avoid this find the file in your Downloads folder and right-click on it. You can then choose which app to open it in under **Open with >**

Exporting multiple references

1. If you are signed-in with a Google account, you can export multiple references.
2. Conduct your search in Google Scholar...
3. Click on the star icon below each relevant reference – this will add the references to My library.
4. Once you've finished selecting references, click on My library (top-right).
5. You can use the **Export all** button above the references to save a '.enw' file that can be imported into EndNote. If you do not want to export all the references in My library, either click on **Cite > EndNote**, under each reference you want to export or use the **Label** function (next to Cite) to create a group. This will appear on the left under **All articles**. Click on it to see the references you want to export and use the **Export all** button to export them as a group.
6. Click on the '.enw' file to open it in EndNote. Depending on your browser you may be asked to choose which EndNote Library you wish to import the references into. Navigate to where your EndNote libraries are located (by default, your Documents folder) and choose a library.
7. The references should now be in your EndNote library.

Adding new references manually to EndNote

1. Click on **References > New Reference...**
2. A new window will open. Use the drop-down menu to select the reference type – the default is Journal Article, but you can change it to Book, Report, Web Page, etc....
3. Complete as many fields in this window as appropriate, at least including Author, Year, Title, and URL, if appropriate.

4. Click on **Save**, then close the window (click the x in the top-right of the pop-up window). The new reference will have been added to your EndNote library.

Using the Capture Reference bookmarklet

This EndNote tool can be added to your browser's bookmarks/favourites to 'grab' references from the web – either of a webpage itself or bibliographic details of an item (e.g., journal article) from a database webpage.

1. [Login to EndNote online](#) and go to the **Downloads** tab. If you are 'not a member yet', click **Register** and follow the process.*
2. From the Downloads tab, drag the Capture Reference button to your Bookmarks/Favourites bar (if the bar is not visible, it can be made so in your browser's settings).
3. Follow the further instructions under the **Capture:** heading.
4. You can add metadata in the form that pops-up before saving it to EndNote, either online or on your PC. If you chose to save it to your PC a '.ris' file will be saved to your Downloads folder, which you can then open in EndNote by right-clicking on it and choosing **Open with >**

* The free web version of EndNote (myendnoteweb.com) is worth signing-up for as it also allows you to sync your EndNote library, which allows you to access your library when you are not using the computer on which you have EndNote installed.

Managing and editing your library

Checking for duplicates

1. To identify duplicate items, click on **Library** in the menu bar, then **Find Duplicates**. If any duplicate references are found in your library, the **Find Duplicates** box opens.

2. At the top of the box there is a message telling you how many duplicates have been found. The box then displays the duplicate items side by side, inviting you to select which one to keep. For the item to keep, click on **Keep This Record**.

EndNote identifies duplicate references in a library as references of the same reference type with matching Author, Year and Title fields. It is possible that one of the duplicates contains more information than the other, so you might prefer to keep that one. Similarly, not all duplicates will be identified if there are slight differences in the information contained in these fields. Such references can be manually found and deleted. For advanced deduplication instructions, please contact the Library.

EndNote and PDFs

Importing saved PDFs into EndNote for which you do not already have a reference in your library

1. If you have article PDFs saved on your computer you can import them into Endnote.
2. In a Windows Explorer window, navigate to where the relevant PDF is saved and click and drag it into EndNote – drop it over the search box at the top of the middle pane.
3. To make sure the citation metadata is imported correctly, highlight the reference and click on **Edit** from the viewing pane on the right-hand side. Make and **Save** changes if necessary.
4. This process can be used to import a single PDF or a folder of PDFs.

Finding PDFs on the web for references in your library

First, set your **Find Full Text** preferences...

1. Click on **Edit > Preferences > Find Full Text**
2. In the **OpenURL Path** box, copy and paste this URL:
https://oxford.alma.exlibrisgroup.com/view/uresolver/44OXF_INST/openurl?

3. In the **Authenticate with** box, copy and paste this URL:
<https://login.ezproxy.bodleian.ox.ac.uk/login?url=>
4. Click on **Apply**, then **OK** to close the Preferences dialog box.

To search for the PDF for an article whose reference is in your Endnote library:

1. Highlight the reference, or highlight multiple references using ctrl-click.
2. Click on **References** (top menu bar), and choose **Find Full Text > Find Full Text**.
3. You may have to authenticate yourself as an Oxford University user by entering your Single Sign On details on the pop-up screen.
4. If you see a list of databases in the pop-up screen, click **Continue**.
5. Wait for the **Find Full Text** section in your Endnote Library (to the left-hand side of the screen, under My Groups) to finish looking for the PDF.
6. To check if it's been successful, look for a paperclip symbol to the left of the reference. To view a PDF, highlight the reference, and in the right-hand viewing pane, click on **PDF**.

N.B. In the event that the **Find Full Text** tool doesn't find a PDF for a reference it is still worth looking for the PDF by searching for the article/journal on SOLO. Download any you find. You can then attach the PDFs to a reference yourself by highlighting the reference and clicking on **References > File Attachments > Attach File...**

EndNote Click browser plugin (formerly Kopernio)

One-click access to full-text PDFs through your institution's subscriptions and open access, plus easy export to EndNote

For more information go to myendnoteweb.com, click on the **Downloads** tab and see **EndNote Click**.

Creating groups

You can create groups (folders) to bring more organisation to your library. For example, you can have separate groups containing references for different chapters in your thesis or for different articles on which you're working.

1. Click on **Groups > Create group** from the menu at the top.
2. Give it a name.
3. To add references to the group, highlight relevant references and drag and drop into the group.
4. References can be added to more than one group. Every reference will also remain within the **All References** group.

Creating a Bibliography in EndNote

If you want to create a bibliography (i.e., a list of references):

1. Select the references you wish to include in by highlighting them in your EndNote library (ctrl-click to select multiple references that are not contiguous).
2. Go to **File** and choose **Export**.
3. Change the file type to **Rich Text Format (RTF)** and choose the output style (e.g., Harvard).
4. Click **Save**. This can then be opened in a word processor.

Cite While You Write

Inserting references and creating a bibliography in Word

You can use EndNote with MS Word (or LibreOffice) to insert references and create a bibliography in a document. It is important that Microsoft Word is already installed when you install EndNote, as this is when the Word Add-in is also installed, creating an EndNote 21 tab on the ribbon.

1. In Word, open a new document and enter some text.

2. Click on the **EndNote 21** tab on the ribbon to see the EndNote options in Word.
3. Choose your reference style, e.g. Harvard, from the **Style** list.
4. Click on **Go to EndNote** to switch to the EndNote library you have open. Highlight a reference of your choice.
5. Return to your Word document and place your cursor exactly where you would like the reference to be inserted in the text.
6. Click on **Insert Citation**. Some additional options will appear. Click on **Insert Selected Citation(s)** to insert the reference.
7. Word and EndNote will automatically format the reference, and insert a bibliography at the end of your document.

e.g. BELCHER, E. H. & HARRISS, E. B. 1956. Radioactive tracer investigations of red cell survival in the rat. *Strahlentherapie, Sonderbd* 36, 5-12.

N.B. If your chosen style requires you to add page numbers to your in-text references click on the reference you have inserted in Word and click **Edit & Manage Citation(s)** in the EndNote 21 tab. In the **Suffix** box put a space then e.g., p.9.

Saving a Compressed EndNote Library

If you want to back up your library, or send it to someone else, the best way is to save it as a **compressed file (.enlx)**.

1. Open the library in EndNote, go to **File** and choose **Compress Library (.enlx) ...** at the bottom of the list.
2. Select **Create** and choose **With File Attachments** (select **Create & E-mail** if you want to send your compressed library as an email attachment.)
3. Select **All References in Library**
4. Select **Next**, choose where to save it, then click **Save**. You, or anyone else, will be able to open it by double clicking on it, as long as EndNote is installed. It is opened as an individual EndNote Library.

Useful links

- [Official EndNote Tutorials](#)
- Bodleian Libraries [Managing your references](#)
- Get help from your Bodleian Health Care Libraries [Outreach Librarian](#)