

EndNote software is available on university computers in some departments, in the Bodleian Libraries, and in IT Services. The most recent version is **EndNote 20**. The University has a subscription to EndNote, which means you can install EndNote for free on to a University-owned computer (for instance, a desktop in your department) or a personal device.

To install EndNote on a University-owned computer, ask your local IT help for advice. To install EndNote on a personal device, please find instructions and versions for Windows and Mac on IT Services' website: <https://register.it.ox.ac.uk/self/software?swp=endnote>.

EndNote is software that is installed on your computer. For this reason, it is fast and will work when your computer is online and offline.

EndNote is less suitable if you use several different computers because it will only work on a computer which has the software installed. You will also need to carry your library of references from one computer to another. The best experience is when using **EndNote Online** alongside EndNote on the desktop. EndNote Online is a free reference manager in its own right, which stores your references in an online library in the cloud. The two can be used together: you can synchronise the two libraries so that your full set of references appears both in EndNote (on your computer) and in EndNote Online in the cloud. You will find more details about EndNote Online in the **Collaborating** section below.

Please note, we do not recommend storing EndNote libraries on cloud services such as Dropbox, which can corrupt your library of references.

Getting Started

- Go to Start | All Programs and choose **EndNote**
- Close any advertisements that appear
- If a recently used library opens, close that library
- Choose File | New
- Give your Library a name (today, please save it on the home drive H:)
- Next time you start EndNote, it will open the same library

Connecting to Online Sources of References

EndNote's built-in tool can download references from a number of publicly available services (eg. PubMed) and many university library catalogues.

- Click **Online Search** towards the bottom of the pane on the left of the screen.
- Choose a database from the Online Search list, or click **more**.
- Enter some search terms in the Search panel at the top, and click **Search**.

- To save the references to your library, highlight the references you would like to add by clicking on them, then click the plus button to the top right of the results. They are listed temporarily in the Online Search area.

Importing references from SOLO

- Visit the SOLO resource discovery tool <https://solo.bodleian.ox.ac.uk/> and search for a resource of your choice.
- When you have found a record, click the title of the book to open the full record.
- Across the top of the record, you will see a horizontal set of icons labelled **Export Options**.
- Click the icon labelled **RIS**.

Export Options



- You will be asked to choose a character format. Select **UTF-8** and click **Download**.
- Click on the file that is downloaded in your web browser.
- On a PC, a box will pop up to open the Primo_RIS_Export.ris file. Select EndNote 20 from the list of options for the browser to Open the file with.
- The reference(s) in the file will be added to your library.

Collecting References from Web of Science or similar websites

Many online databases can export references directly into your EndNote library.

- Open a web browser.
- Visit **Web of Science** at www.webofscience.com/wos
- Search for a topic of your choice and click **Search**.
- In the list of search results, tick the checkboxes beside a few references.
- Click the **Export** button at the top of the results and select **EndNote desktop** (not EndNote online).
- Choose the fields you want to export.
- Click on the file that is downloaded in your web browser. Your references are then downloaded straight into your EndNote library.

Editing a Reference

- Double click on one of the references.
- Some details of the selected reference appear in a pane on the right (if necessary click the **Edit** tab at the top of the pane).
- Scroll down and edit some details if you like.
- When you leave this reference, if asked, confirm that it should be saved.


Organising References in Groups

Groups are a good way to organise your references (groups are like playlists).

- On the main menu, choose **Groups | Create Group**
- Your new group will appear in the Groups panel on the left
- Give your group a name (e.g. the topic you are researching, or the project name)
- Drag one or two references into the new group
(hold the Ctrl key while clicking, to select more than one reference)
- Create another group, give it a name and drag some references into it
– notice that a reference can belong to more than one group

Including Citations in a Document (in Microsoft Word)

In **Word**, an **EndNote 20** tab appears in the ribbon. You can use this tool to insert and manage citations in your documents.

- Start **Word** with a new document.
- Choose a citation style using the Style drop-down on the **EndNote 20** tab of the ribbon: a few styles are listed, and you can find more by choosing **Select another style** (hint: Author-Date may be a good style to start with)
- Type a few words in your Word document, then position your cursor at a point where you would like to insert a citation.
- Open your EndNote library and select a citation, then click the double quotation mark icon in EndNote 
- The citation you chose in EndNote will now be inserted in your Word document.
- Add a few more citations for practice.
- Look at the end of the Word document: the bibliography has been created automatically.
- Change the citation style using the **Style** drop-down in the EndNote tab of the ribbon in Word.

Attaching a PDF to an EndNote Reference

If you have previously saved a PDF full-text of an article, EndNote can attach the PDF to an existing reference or can search it for the bibliographic details and create a reference with attached PDF.

- Go back to the Web of Science website and for one of the results, click either **Find it at Oxford** or **View full text** to see if a full-text PDF is available. Then save the PDF article to the H drive on the computer.
- Select a reference in your library so the edit pane opens in the right. Click the **PDF** tab at the top of the pane and click **Attach PDF**. Browse to the PDF on the H drive to attach the PDF to the reference.
- In EndNote, choose **File | Import | File**

- In dialogue box that opens, click **Choose** next to Import File. A new dialogue box will open: navigate to the PDF file that you downloaded to the H drive and click **Open**.
- You will be returned to EndNote. In the dialogue box, set the Import Option to **PDF**.
- Click **Import**
- EndNote will create a bibliographic reference from the PDF and attach the PDF itself to the reference.
- Now view the full text of the article in EndNote's PDF viewer on the right of the screen.
- EndNote can handle multiple PDFs at a time, so if you have a collection of PDF files, you could import them all and collect their bibliographic details in this way.

Note, you should always check bibliographic records imported in this way, as they may be incomplete.

EndNote can also add full text PDFs to your references automatically if we have a subscription to the journal at the University of Oxford. To configure the settings in EndNote for your personal machine:

a) Go to your Find Full Text options:

On Windows: Edit > Preferences > Find Full Text

On a Mac: EndNote > Preferences > Find Full Text

b) Within your Find Full Text options, copy and paste this link in Authenticate with box: <https://ezproxy-prd.bodleian.ox.ac.uk:2048/login>. Then click OK.

Once you have done this, or if you are on a computer at IT Services, you can then download full-text PDFs.

- Highlight the reference in EndNote.
- Click on **References** at the top of the EndNote window, and choose **Find Full Text**.
- You may have to authenticate yourself as an Oxford University user by entering your Single Sign-On details into the next screen.
- Wait for the **Find Full Text** section in your Endnote library (to the left hand side of the screen) to finish looking for the PDF.
- If it is successful, you will see **Found PDF** under **Find full text** and a **paperclip icon** next to the reference in your Endnote library.
- You can view the PDF by clicking on the PDF icon on the right hand reference pane and clicking **open**.

EndNote with EndNote Online

EndNote is installed software, and it works offline or online. As you have seen, you can go online to import references from databases into EndNote. References and data are saved in a library on your computer. To be able to use references on another computer, you can sync the library of references via EndNote online.

EndNote online (<https://access.clarivate.com/login?app=endnote>) is web-based reference management software that works on its own or can sync with EndNote (and there is an iPad app).

Activating the Sync process

- In EndNote, click **Edit | Preferences**, then click **Sync** on the left of the dialogue box that opens.
- Click **Enable Sync**. In the dialogue box that opens, either enter your existing EndNote Online credentials or click **Sign Up** to register for a new account.
- Click **OK** to initiate the Sync process, then click **OK** in the EndNote preferences dialogue box to close it.

EndNote Software

The current version of EndNote is 20, and it is available in Mac and Windows versions.

Resources

Courses are taught in Oxford's IT Learning Centre <https://skills.it.ox.ac.uk/>. There are tutorials for EndNote and EndNote online from the EndNote company on YouTube.

These notes are available for download, along with similar notes for comparing other reference managers, via the iSkills web page at <https://www.bodleian.ox.ac.uk/ask/workshops>