



University  
of Glasgow

# Introduction to EndNote Desktop

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Building a Reference Library and working in Word

V1.1

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web: [gla.ac.uk/services/it/training](http://gla.ac.uk/services/it/training)

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# Contents

Introduction .....	iii
Objectives .....	iii
Introduction to EndNote Desktop .....	1
1 What is EndNote? .....	1
2 How to obtain EndNote.....	1
3 The EndNote Library .....	2
4 Adding references using EndNote .....	5
5 Importing References from the Web .....	11
6 Organising your References .....	16
7 Adding Full Text .....	23
8 Creating a Bibliography: Using Cite while you write .....	28
Appendix 1 Endnote Basic (aka Online or Web).....	32
Appendix 2 Advanced Preferences: Find Full Text.....	35
Appendix 3 Generating a combined Bibliography, having merged all Chapters of a Thesis .....	36
Useful Shortcut keys .....	37

# Introduction

In this introductory course, we explore the EndNote X8 package. This course explores the main features of the software from the creation of an EndNote library through to the inserting citations into a Microsoft Word document. EndNote is a powerful tool for anyone engaged in academic research, study and writing, during the course you will learn to use the most useful features contained in the application.

## Objectives

On successful completion of this course, participants will be able to:

- Create an EndNote Library
- Add references manually
- Import references from online databases
- Import references using EndNote's Online Mode
- Manage your references by and creating and using groups
- Attach PDF documents to your references library
- Check for and remove duplicates from in your EndNote library
- Cite your references when writing in Word
- Change citation styles within a Word document.

# Introduction to EndNote Desktop

## 1 What is EndNote?

EndNote is a reference management application, which is used to manage bibliographies and references when writing theses, essays and articles. The software is available for both PC and Mac.

EndNote allows you to:

- Store all the references that you find during your research. They can be entered manually or downloaded from most databases.
- Store PDF files, pictures, graphs, tables, etc.
- Add citations to your work and create bibliographies in any output style (e.g. Harvard, Vancouver). There are 5,000 styles to choose from.

## 2 How to obtain EndNote

### a. Preinstalled

It is preinstalled on:

- Student computer clusters (CSCE)
- Students: CSCE Remote- Remote Desktop service
- Staff: SSD Remote- Remote Desktop service - for Standard Staff Desktop users

SSD users can upgrade to the latest version of EndNote, (see c. Download from University website)

### b. Purchase from Bilaney Consultants

Students are able to purchase the software at a discount from here:

<https://www.bilaney-consultants.co.uk/our-products/endnote.html>

For each licence purchased, EndNote X8 may be installed on up to 3 computers (both Mac and Windows) for exclusive use by the licence holder. All licences are a one-off purchase (not subscription).

### c. Download from University website

Staff and postgraduate students are able to install endnote free, though only for use on University owned/operated machines.

**You must register before downloading.** Registration and download links are found at:

<https://www.gla.ac.uk/myglasgow/it/software/bibliographic/#/endnote>

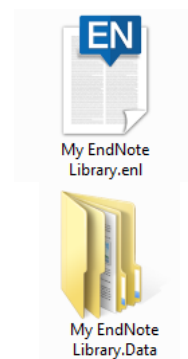
**If you have an earlier version of EndNote you should uninstall it before installing EndNote X8.**

## 3 The EndNote Library

### a. Introduction

EndNote references are stored in a database called a library. EndNote libraries have the file extension **.enl**

Each library has a corresponding folder with the extension **.Data**. This folder will have the same name as the library, and it is where images, PDF files, etc. are stored. If you move, copy, rename or delete a Library remember to do the same with its corresponding **.Data** folder.



- You are not limited to the number of references you can store in a library. However, it is recommended that you do not exceed **100,000** references to maintain efficient performance of the database.
- Although the software allows you to create as many libraries as you wish, it is strongly recommended that you keep all your references in just one library. This way you will know where to find them, and will not create duplicate records in other Libraries.
- Within your library, you can create Groups (or subsets) to help you organise your references. Custom Groups are manually created by drag-and-dropping to copy references into a Group.
- You can also create Smart Groups that use search criteria and dynamically update themselves.
- Each EndNote record stores the information required to reference it in a Bibliography. Other information, to help you with your research, such as keywords, notes, abstracts and URLs can be stored in a record as well.
- You can attach PDF files and images to EndNote records, and you can annotate PDFs with highlights and your own comments.

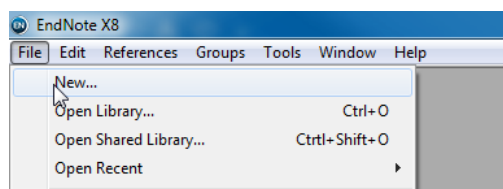
### b. Creating an EndNote Library

Endnote libraries are the files that store your references, PDFs and other data. You may store your library wherever you think it is most useful to you. However when considering a suitable location for storing your library, think about where is easily accessible and easiest for creating back-ups.

Although we can synchronise this local library with the online library of EndNote Basic, this is not a substitute to having a sensible and durable backup regime.

### Task 1: Create an Endnote Library

- 1 Choose **File** Menu, **New...**



- 2 Accept the default name **My Endnote Library**
- 3 Click **Save**

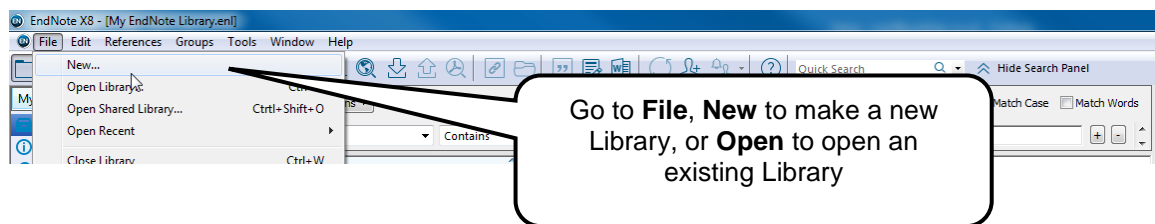
- 4 Once saved it will open automatically
- 5 If you need to click on the maximise button on the top left of the open library so that your open library fills the screen.

Although your library should open automatically when you create it, you may in the future need to open a library. This is done from the file menu by selecting:

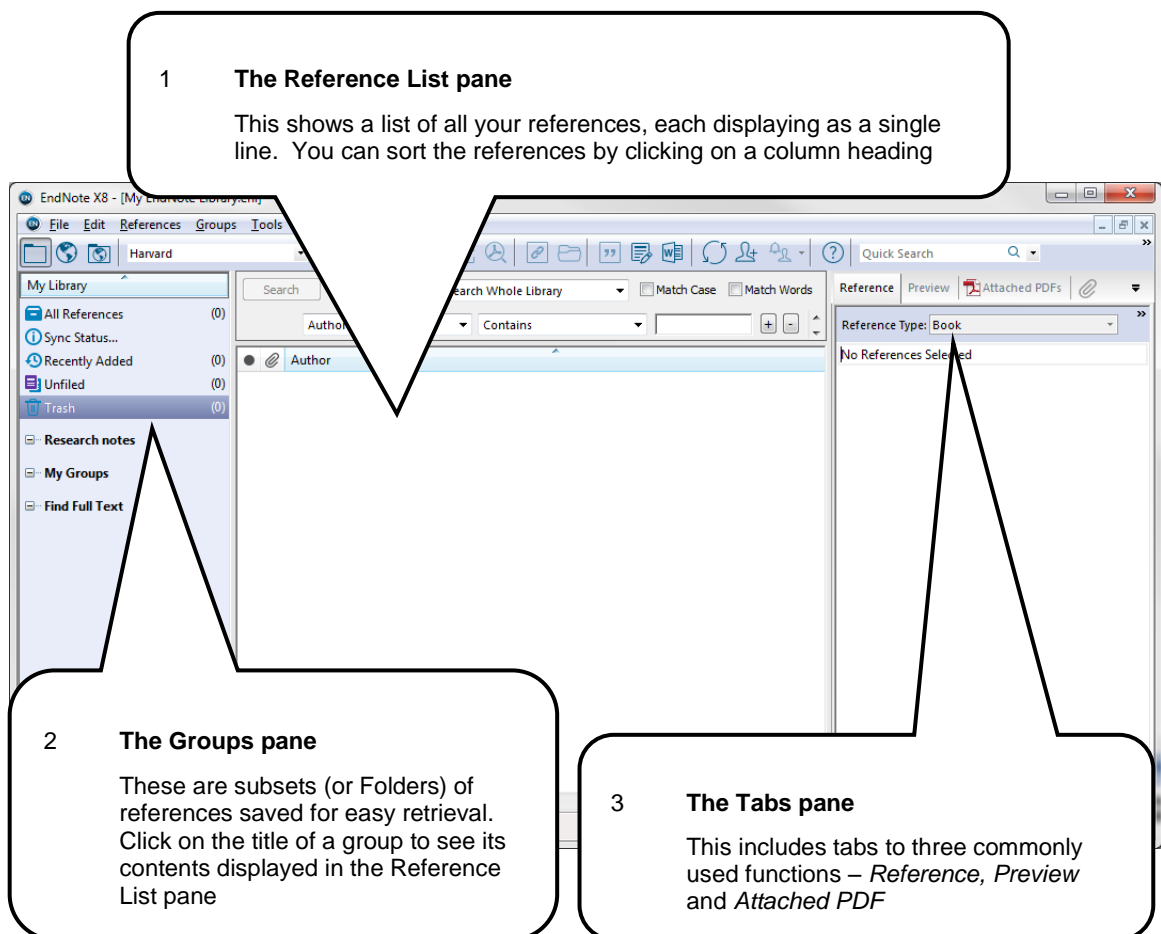
**File > Open > Open Library**

### c. Library Overview

Once you have created a library



The Endnote Library window is split into 3 panes:- **Groups pane**, **Reference List pane** and **Tabs pane**

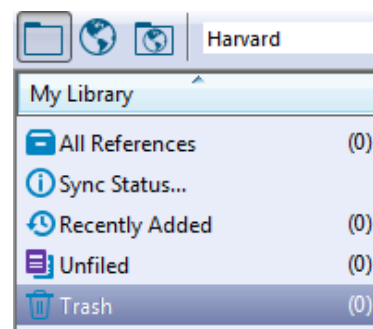


## d. EndNote Modes

EndNote has three display modes:

- Local Library (Folder icon)
- Online Search (Globe icon)
- Integrated (Folder & Globe icon)

These are displayed in the top left corner of EndNote above **My Library**



**Local Library** displays all of the records held in your EndNote database.

**Online Search Mode** is a temporary library that will display the results of online searches from within EndNote. Results from these searches are **not** added to your local library. These results can be reviewed and then selected references can be added to your library.

**Integrated Library and Online Search Mode** will automatically import all of the results from an online search into your local library and mark them as 'unfiled'. **Use this mode with caution!**

## e. Reference Overview

○	Fraser, O. N.; Bug...	2011	Ravens reconcile after aggressive conflicts with v...	★ ★
○	Funk, M. S.	2002	Problem solving skills in young yellow-crowned ...	
●	Goto, K.; Watana...	2012	Large-billed crows ( <i>Corvus macrorhynchos</i> ) have...	• • • • •
○	Greenhall, Arthur	1982	House bat management	

To see all the details for a reference, you can either use the Reference tab, or double click on the Reference in

Each Reference has its own unique number. EndNote uses these numbers for formatting and they cannot be changed

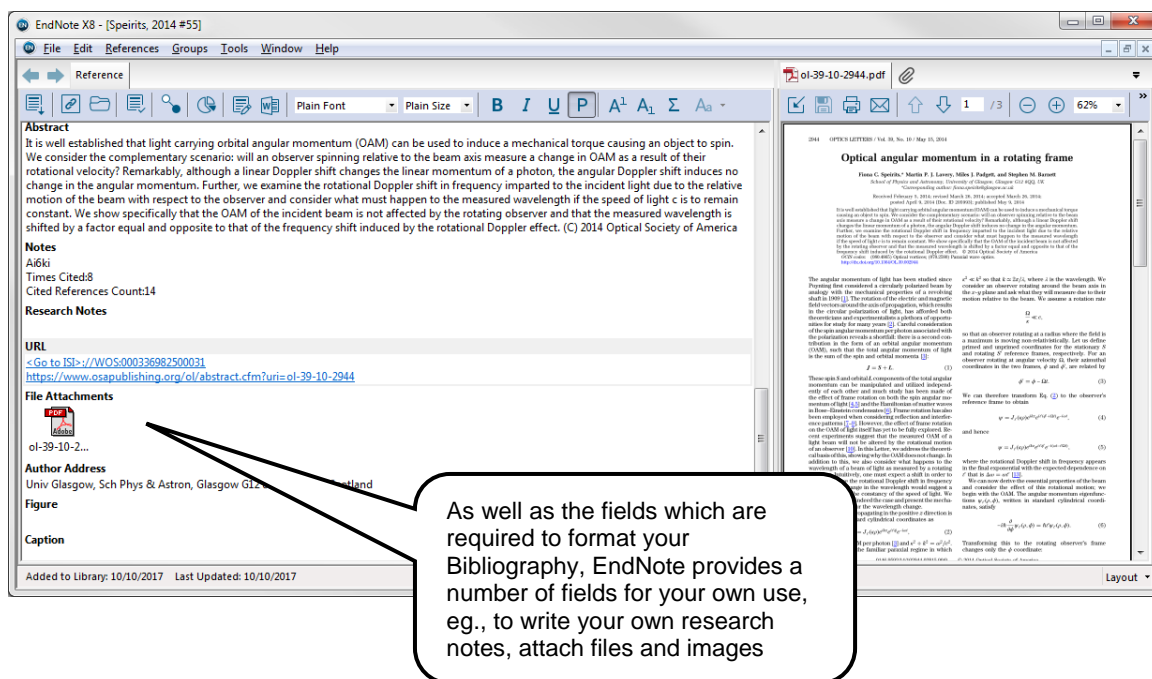
Use the **Aa** button if you need to change case – eg., for titles imported in all caps

The font and size should both be set as **Plain**, unless you need a special style for a character. You do NOT need to set italics or bold; EndNote will do this for you

When you are typing in numbers, eg., for pages or volumes, you do not need to type v. or pp. before them – just the numbers

Use the **Options** button to hide or display empty fields in the record and display the Ratings tool





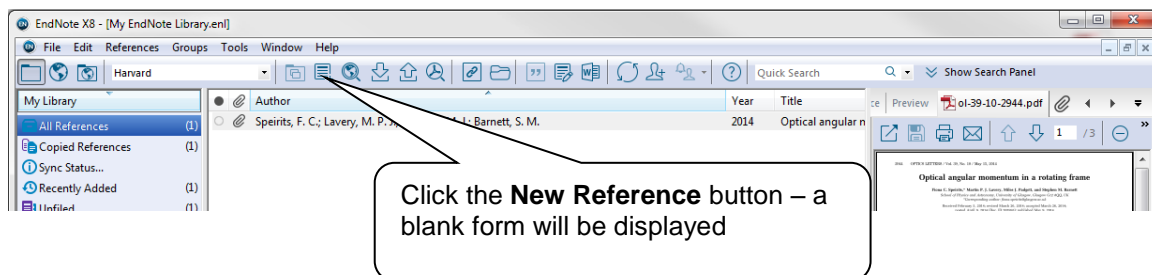
EndNote X8 has 50 predefined reference types that it can store. Records imported automatically from databases will usually have the correct reference type selected, but occasionally you will need to change it to achieve a better citation.

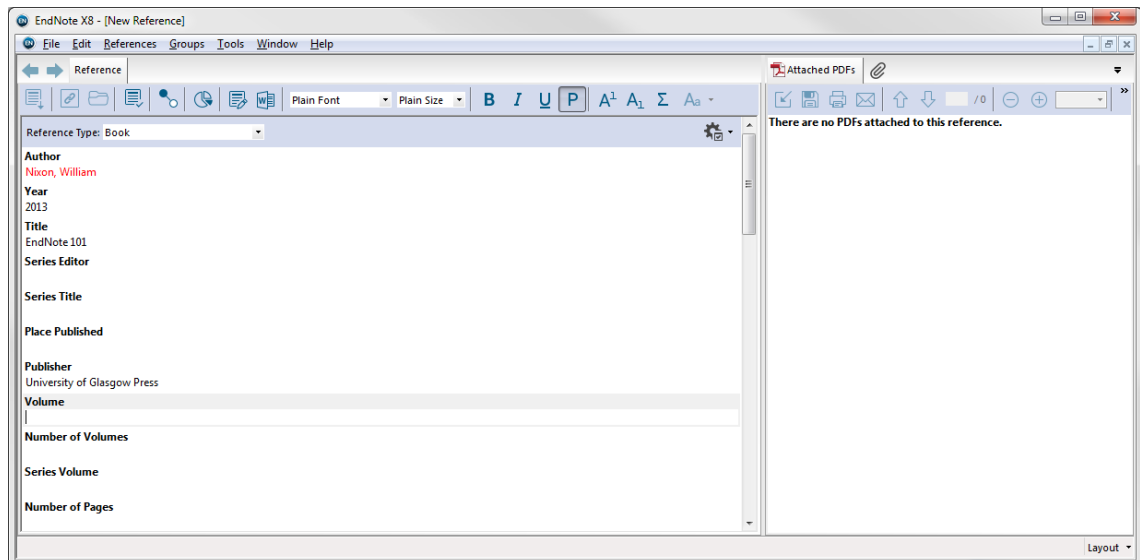
EndNote has some features to help with your information management. When you import records into EndNote they will be displayed in **bold** (unread). To help you keep track of your workload you can mark records when you have read them, and also assign a rating to remind yourself how useful you found the paper.

## 4 Adding references using EndNote

### a. Manual Input

Usually, References will be added to your Library by importing them directly from online databases, but occasionally you will need to make a manual record – for example, for a webpage, blog or unpublished report that does not have an electronic record for it.





- 1 Select the correct **Reference Type**
- 2 Remember that EndNote will do any standard formatting automatically so set **Plain Font** and **Plain Size**
- 3 Type the information into the relevant fields.

(Most of the fields you need to produce an adequate citation are towards the top of the page)

- 4 Click the **Close** button to save the reference

The first time you attempt to close the reference-editing screen, you will be prompted with a message that asks you if you wish to save the reference.

If you select the tick box before you answer yes, then this will be the last time that you see this dialogue box. Manually created or edited references will be saved automatically whenever you close the dialogue box.

**Many of the fields are provided to help you organise your research, make useful notes, etc. You do not have to fill them all in.**

Sometimes, you will also need to edit records that you have imported from databases. In this case double click a reference to edit.



## Task 2: Manually Create References

With your existing library:

- 1 Manually create a new reference for a book e.g.
 

Author:	Nixon, William
Year:	2014
Title:	EndNote 101
Publisher:	University of Glasgow Press

- 2    Manually create a new reference for a journal article e.g.  
       Author:                Harriman-Hunter, Judith  
       Year:                    2014  
       Title:                    Using EndNote for bibliographies  
       Journal:                Journal of Bibliographies  
       Volume:                1  
       Issue:                    1  
       Pages:                   100-110  
       ISSN                    1234-1234
- 3    Manually create a new reference for a book section e.g.  
       Author:    Nixon, William  
       Year:                    2014  
       Title:                    Importing EndNote from Web of Science  
       Editor:                Harriman-Hunter, Judith  
       Book Title:            EndNote and Beyond  
       Place:                    Glasgow  
       Publisher:            University of Glasgow Press
- 4    Create a number of other manual references; try different **Reference Types** to see the range of fields
- 5    Select the **EndNote 101** reference that you created.
- 6    If you need to click on the **Reference** tab in the tabs pane (it will probably already be selected)
- 7    Click on the **Place Published** field in the tabs pane
- 8    Type in **Glasgow**
- 9    Select any other reference

When you edit a reference in the tabs pane, the changes that you make are automatically saved at the point that you click on another reference.

## **b. Importing References**

When you search databases to find journal articles, books and other material there will usually be options to export the results of your search so that you can import references into your own EndNote Library. In many cases, it is possible to import these results directly into EndNote. Otherwise, you can usually export them to a file, and open that file (either automatically or manually) within Endnote.

Many databases have an export, save or download option that will send your search results directly to EndNote. All you need to do is choose the EndNote Library into which the data should be imported.

In a few databases, importing records is a two-step process where you save the results of your search into a file, then import that file into your EndNote Library using an Import Filter.

Note that not all databases will have an option to export records to EndNote. In those cases, you can try exporting the references in another format (i.e. Bibtex). EndNote is able to read and import from many other reference library files. It will, on occasions still be necessary to add details of those references manually to your library, as described in the previous section.

### c. Online Search Mode

EndNote also provides an “Online Search Mode” which enables you to search for articles from EndNote itself. You may find this mode especially useful when you already know the book, journal article etc., that you wish to reference.

EndNote is able to connect to a whole host of online catalogs and resources.

Note however that the University does not have access to every one of the nearly 6,000 resources that EndNote can connect too.

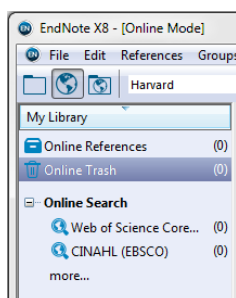
### Task 3: Import references with Online Search Mode

- 1 Click on the Globe icon in the top left to enter **Online Search** mode.

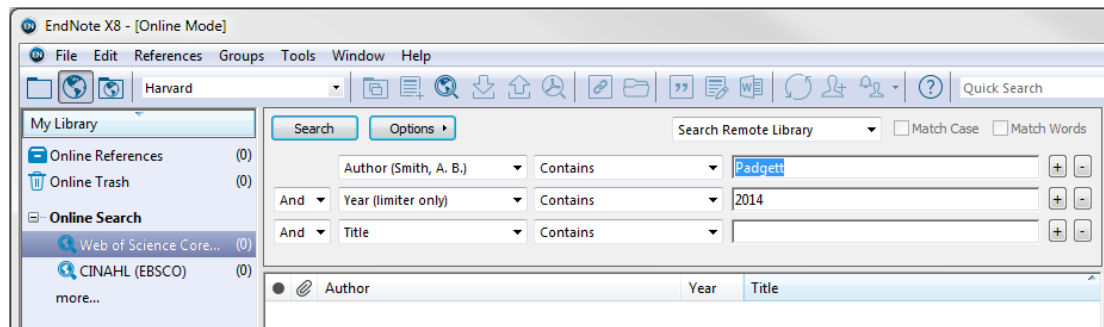
A number of resources are displayed including the Web of Science Core Collection and an option for more...

In this example, we are going to search for examples of articles written by Padgett published in 2013.

- 2 Click on **Web of Science Core Collection**



- 3 In the search box, type the following:

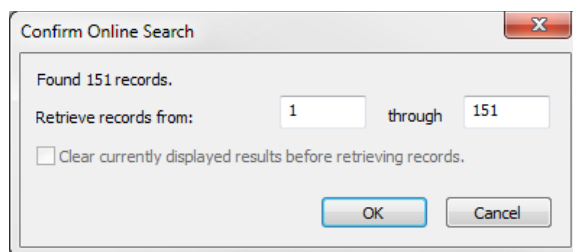


Author: **Padgett**

Year: **2014**

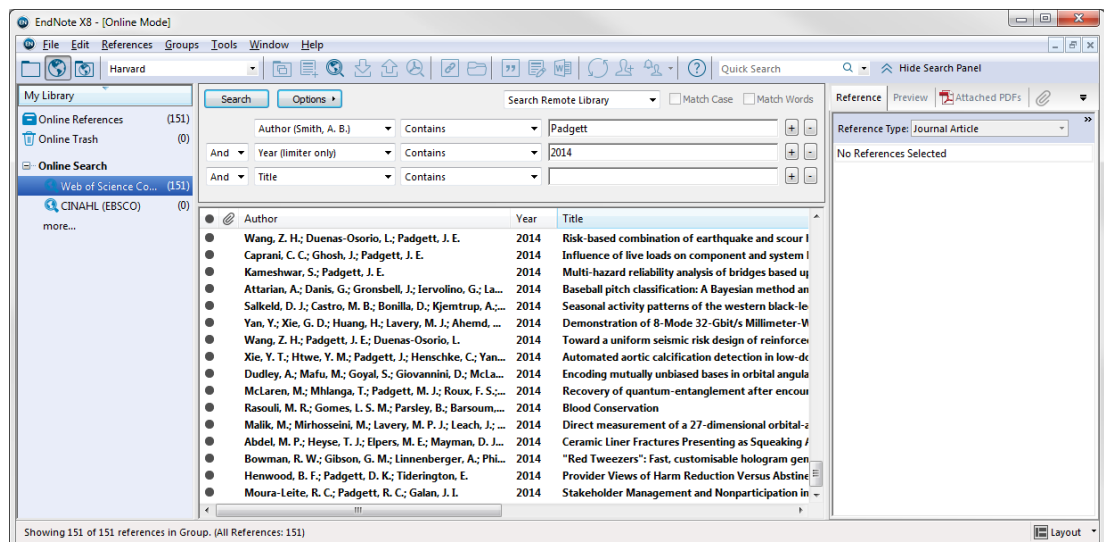
4 Click on **Search**

EndNote will do this search, report on the number of records found and ask for confirmation.



Downloading the results of an online search can take some time. If the number of records found is in very large, you will probably wish to cancel the search at this point and revise the search criteria you have used.

5 Click on **OK** and the results will be displayed in EndNote.

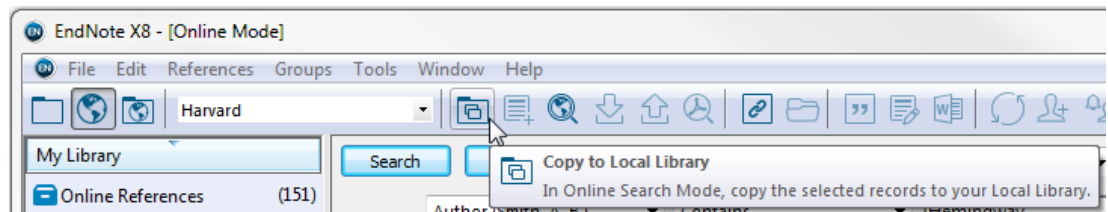


**Note that these are not copied into your local Library in this mode.**

6 Sort the results by **Title** by clicking on the **Title** column heading

7 Select "**Optical angular momentum in a rotating frame**" with a single click

- 8 Right click and use the **Copy Reference to** command to copy this to your library.
- 9 Holding the **Control** key and single click multiple other references
- 10 Click the **Copy to Local Library** button in the **EndNote Toolbar**



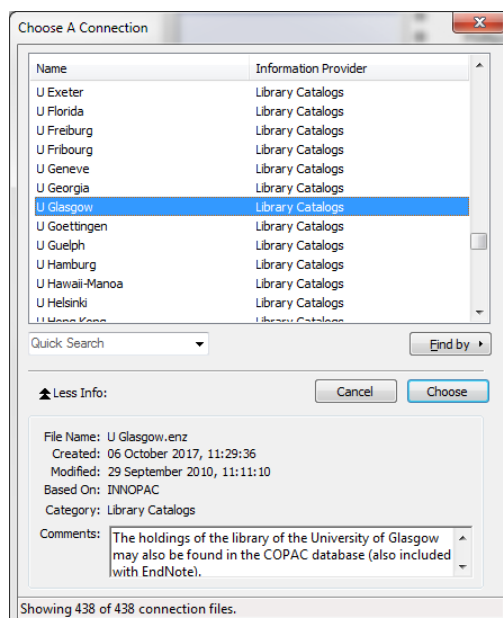
Either of these methods will make a copy of a reference or references in your local library

## Task 4: Use the University of Glasgow Library Catalogue

In our previous task, we used the Web of Science Connection file to search that catalog. Now we shall use a connection file for the University of Glasgow's Library catalogue.

With EndNote open and in **Online Library Mode**:

- 1 Click on **more...**  
The Choose a Connection dialogue box will open
- 2 Either:  
Scroll to **U Glasgow**.



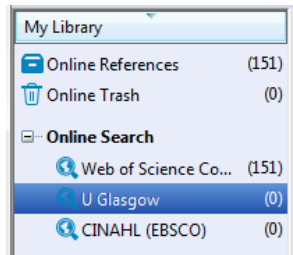
Alternatively:

Type **Glasgow** into the Quick Search box and click **Enter**

- 3 Select **U Glasgow**
- 4 Click **Choose**.

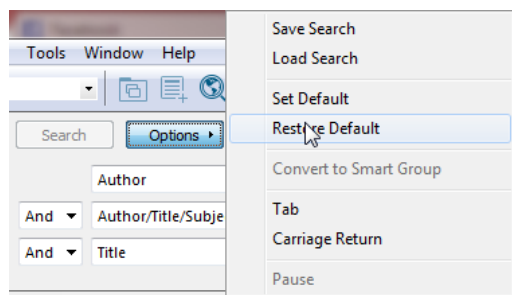
It will now be displayed as **U Glasgow** in Online Search.

- 5 Select **U Glasgow** in the left hand pane

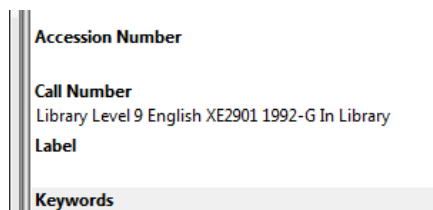


The search terms from our previous task will still be present. To remove them:

- 6 Click Options
- 7 Select **Restore Default**



- 8 Run a search for author, **Hemingway, E** (Confirm the search when prompted)
- 9 Double-click on “**Complete Poems**” to see the full record,
- 10 Scroll down and you will see the Library call number and the status at the time of the search.



- 11 Close the reference
- 12 Copy it to your library.
- 13 Try a number of searches using **Online Search Mode** to add records to your Library

## 5 Importing References from the Web

It will often be preferable to import references from web based online catalogues rather than use EndNote's own online mode. This may be because the data store you are using is not accessible via online mode, or possibly the web based interface offers you better search results and search tools

Each web-based resource (such as Web of Science, SCOPUS, PubMed, etc.) will have its unique layout and features. It is not possible within this course to look at all of them, but almost all will have the ability to export references in a file that can be read by EndNote. We will look at two examples

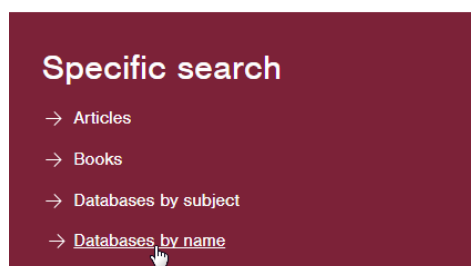
## a. Importing from Web of Science

The Web of Science database is owned by the same company as EndNote (Clarivate Analytics), and they work well together.

References can be exported directly from Web of Knowledge to EndNote Basic (the web-based version) or to EndNote Desktop. Records exported to EndNote Basic can be synced with EndNote Desktop.

### Getting started with Web of Science (formerly Web of Knowledge)

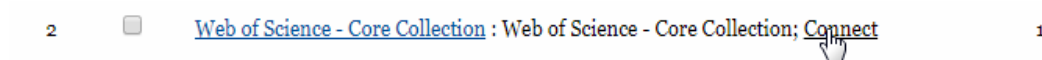
- 1 Navigate to the Library Homepage (<https://www.gla.ac.uk/myglasgow/library/>)
- 2 From the Library home page, click on **Databases by name** from the **Specific search** group



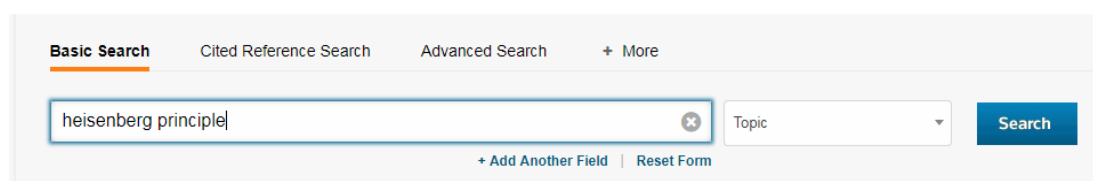
- 3 Use the search tool to find **Web of Science**



- 4 From the search results select **Web of Science – Core Collection – Connect**

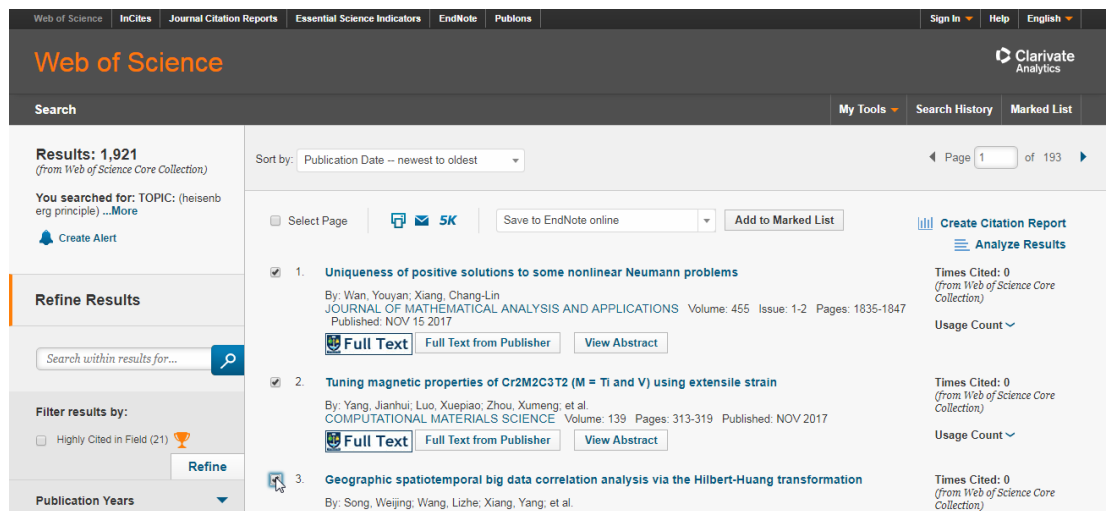


- 5 Log in to the Web of Science database, you will need to provide your GUID and password to get connected
- 6 Type in your search terms e.g. **Heisenberg principle** and click on **Search**

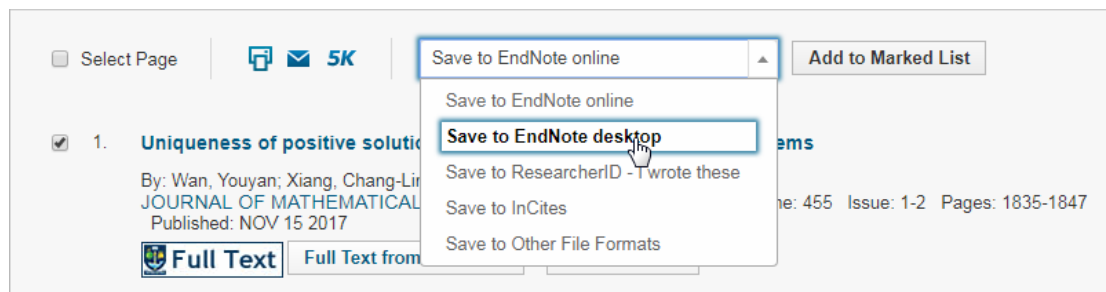


- 7 From the list of results mark the records you want to export





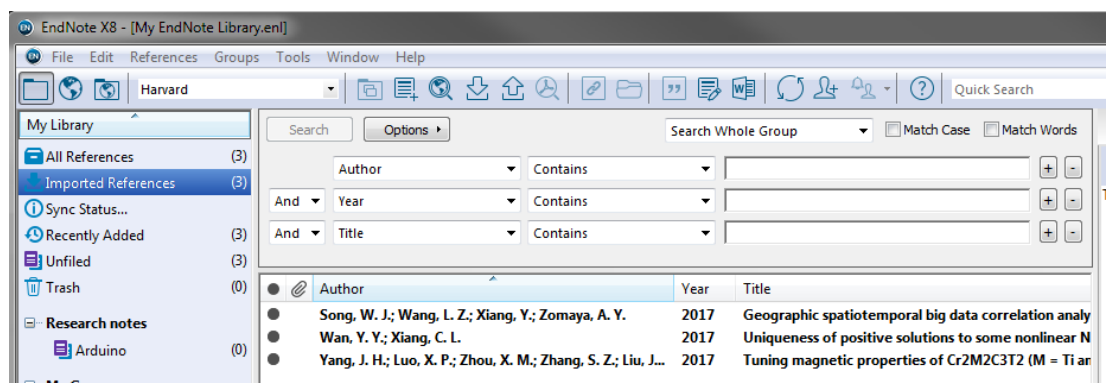
8 Choose the Save to EndNote Desktop from the dropdown menu.



9 Choose record content, in this case **Author, Title, Source and Abstract** then click on **Send**

10 Double Click on the .ciw file that downloads in your browser

11 The downloaded records should import directly into EndNote and will go into an Imported References group in EndNote Desktop.



12 If they do not, you will need to use File > Import > File and import the records from your Downloads folder, by default Web of Science records, for EndNote Desktop are exported as **savedrecs.ciw**.

## b. Importing from Article Search

For our second example, we will import references from the Glasgow University Library website.

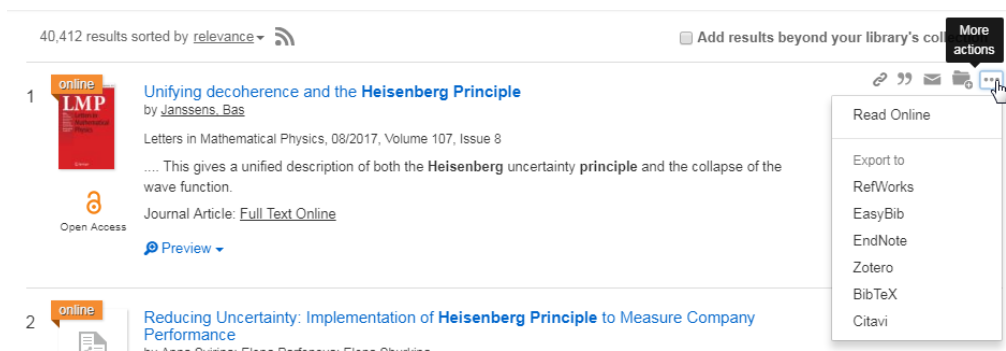
### Task 5: Import References from the Library Web Catalogue

- 1 Open Google Chrome
- 2 Navigate to **<https://www.gla.ac.uk/myglasgow/library/>**
- 3 In the Search tool, type **Heisenberg principle**

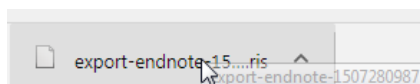
#### **LIBRARY**



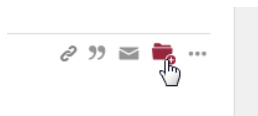
- 4 Click **Search**  
Your results will appear in the browser
- 5 For any of the results in the browser, click the ellipses on the right hand side.



- 6 From the drop down menu that appears select **EndNote**
- 7 Click on the file that downloads (it should appear in the bottom left hand corner of the browser)



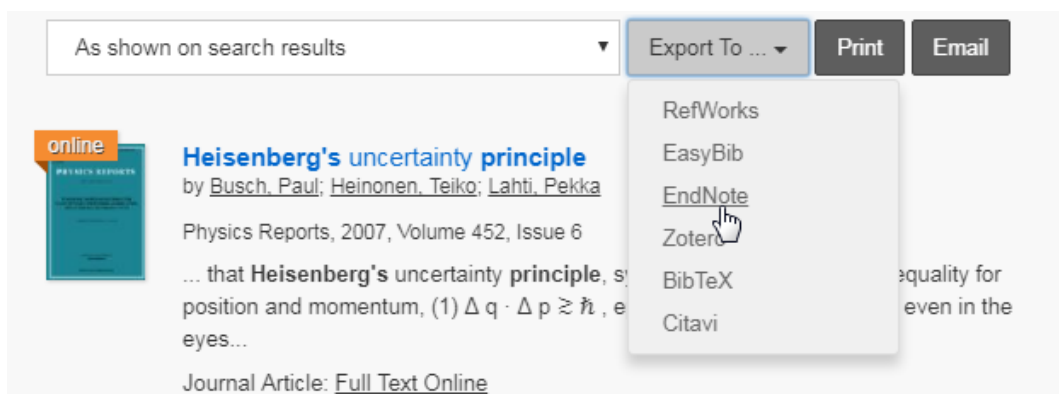
- 8 Select the Chrome icon from your Windows Task Bar  
You will return to your web search results
- 9 In the results page click on the folder to the right of a different record  
The folder icon will change colour



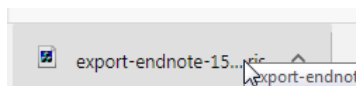
- 10 Repeat this for more records
- 11 As you select records you will see the total number of records displayed in the folder in the top right.



- 12 Click on the folder to see the saved items.
- 13 Click the **Export To...** button
- 14 Choose **EndNote** as the export format.

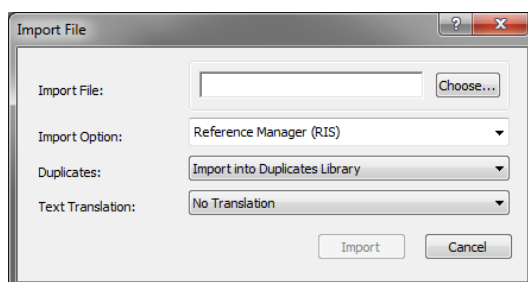


- 15 Click on the file that downloads



- 16 Follow the instructions to import the references

If the records are not automatically imported into EndNote when you click on the downloaded files, they can be imported with the **Reference Manager (RIS)** option.



## 6 Organising your References

### a. Using Groups

Groups make it easy to break a large Library into subsets for later viewing. A group simply points to a subset of references that already exist in the Library.

There are several types of groups that make it easy to organise your references in EndNote. Some of these groups are automatically generated and some are those you create yourself. You can further organise your references by storing multiple groups in custom Group Sets.

Some things to note about using groups:

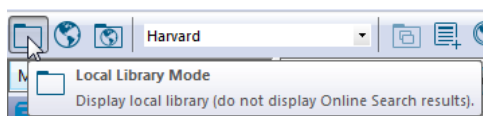
- You can create a maximum of 500 Custom Groups and Smart Groups (combined) in a single Library.
- A single reference will never appear more than once in a particular group. However, you can add that reference to any number of groups.
- Removing a reference from a custom group does not delete it from the Library. It removes the reference from the group subset, but the reference still exists in the Library.
- Deleting a reference from a Library also deletes it from all groups in that Library. The reference no longer exists.
- Custom groups will transfer and be visible in both the Desktop and Basic (online) versions of EndNote
- Group Sets, Smart Groups and other automatically generated groups will not appear when you are using the Basic (online) version of the product

### b. Creating a Custom Group

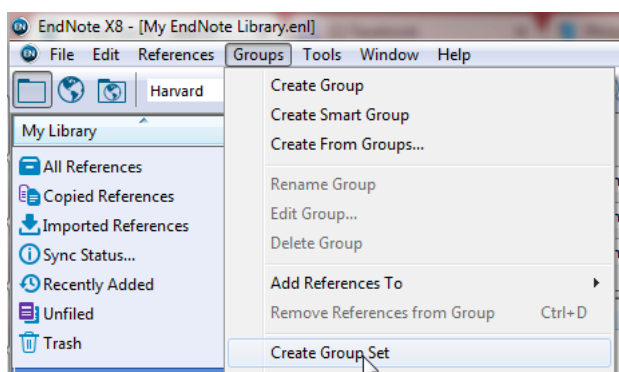
You can create custom groups in order to organise your references. You might wish to make groups for each chapter of your thesis, or for different papers you are working on.

#### Task 6: Create a Set of Custom Groups

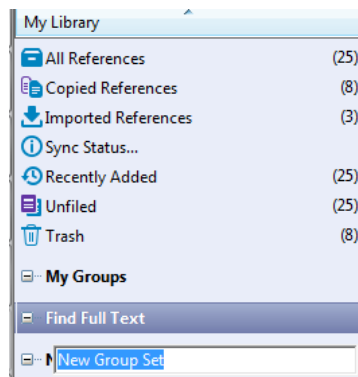
- 1 Click on the folder icon to enter **Local Library Mode**



- 2 Go to the **Groups** menu and choose **Create Group Set**



- 3 A box will appear in the Groups pane.

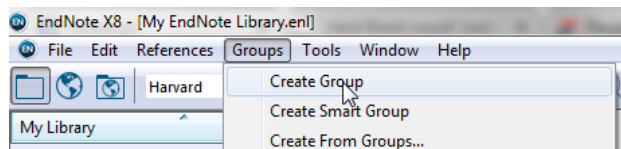


- 4 Type in the name you want to give the group set, e.g., **Thesis**

- 5 Hit **Enter** to save

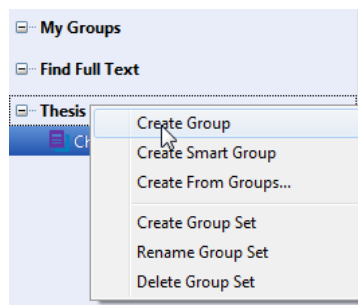
- 6 Select the **Thesis** group set

- 7 Go to the **Groups** menu and choose **Create Group**



- 8 Name this group **Chapter 1**

- 9 Right click on the **Thesis** group set



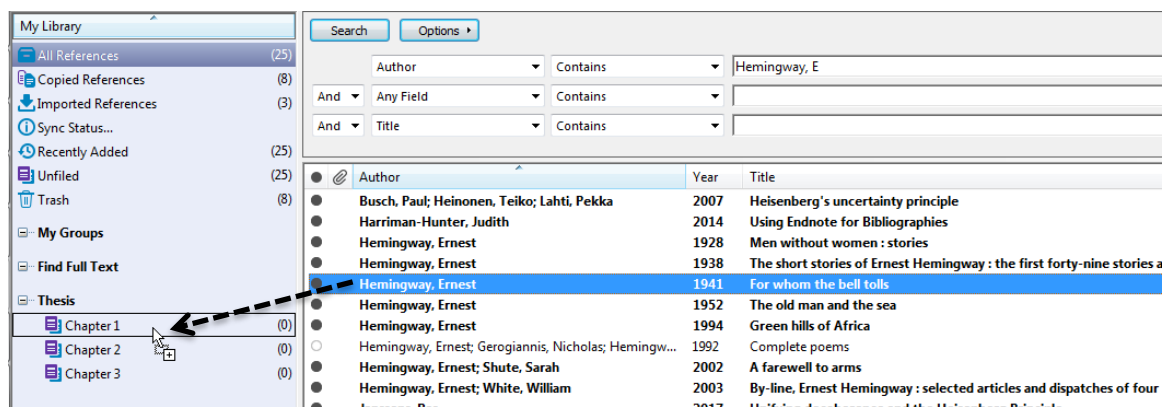
- 10 Select **Create Group**

- 11 Rename this group **Chapter 2**

- 12 Create a group named **Chapter 3** using either method

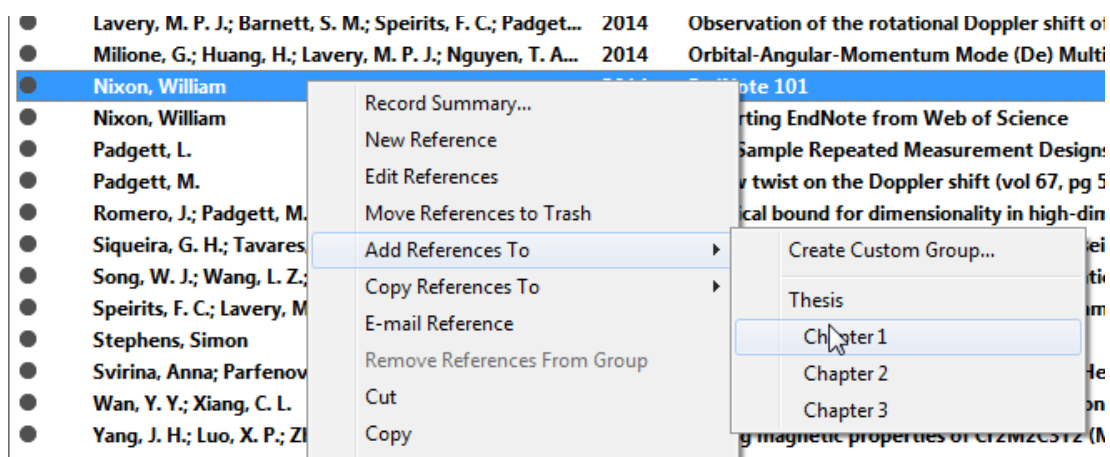
### c. Adding References to groups

An easy way to add some of your existing references to a custom group is simply to drag and drop the reference.



When we do this, the number to the right of the group name will change from (0) to (1), this is displaying the number of references contained within the group.

This is not the only way to achieve this; we can also right click on a reference (or a selection of references) and from the menu select the custom group that you wish to add the reference to.



The standard selection options work in the Reference List pane (click and CTRL click for individual references, click and SHIFT click for a consecutive list of references)

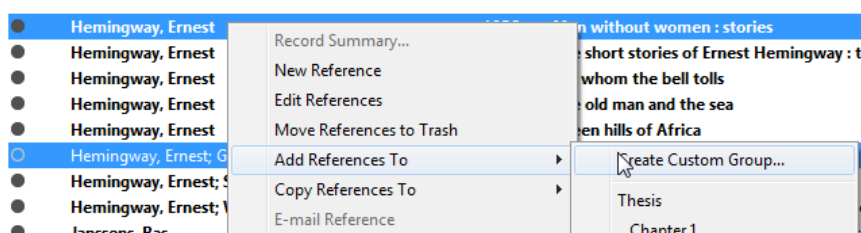
If you choose **Create Custom Group**, your selection of references will be added to a new custom group. After adding them, you can then rename this group to what ever suits you



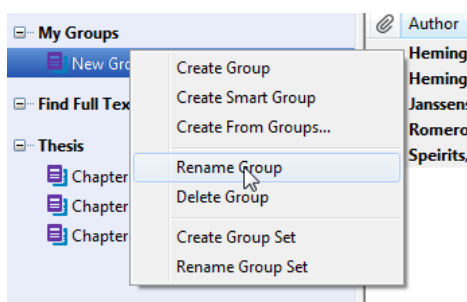
## Task 7: Add References to Custom Groups

- 1 Click on **All References**
- 2 Select the **Nixon, William – EndNote 101** reference with a single click
- 3 Drag the selected reference to the **Chapter 1** group
- 4 Repeat this, but this time drag the same reference to the **Chapter 2** group  
The same reference can appear in as many groups as you wish!
- 5 While holding your control key (Ctrl) click on several random references
- 6 Drag this selection to the **Chapter 3** group
- 7 Right click on any of the references in the selection

- 8 From the menu that appears select **Add References To – Create Custom Group**



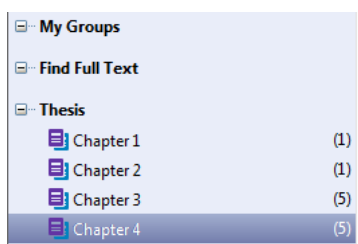
- 9 Under **My Groups**, Right Click **New Group**



- 10 Select **Rename Group**

- 11 Name the group **Chapter 4**

- 12 Drag the **Chapter 4** group to below **Chapter 3**

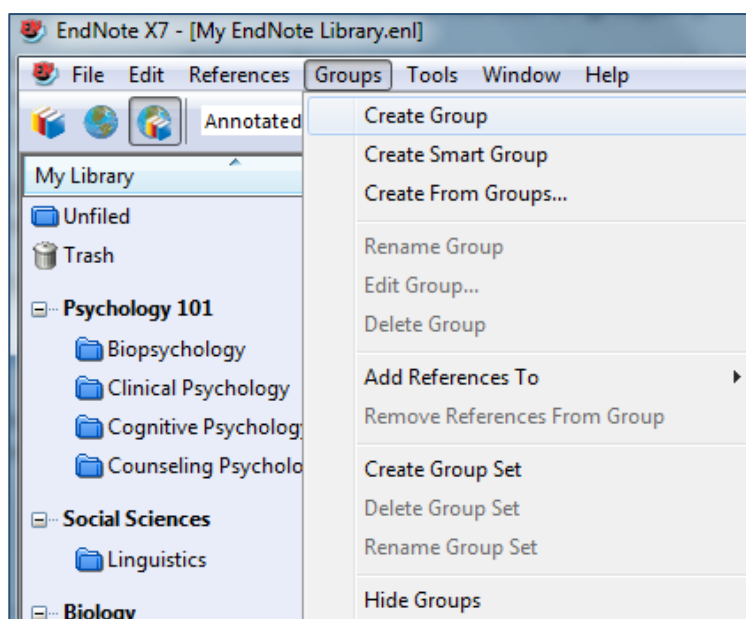


## d. Creating a Smart Group

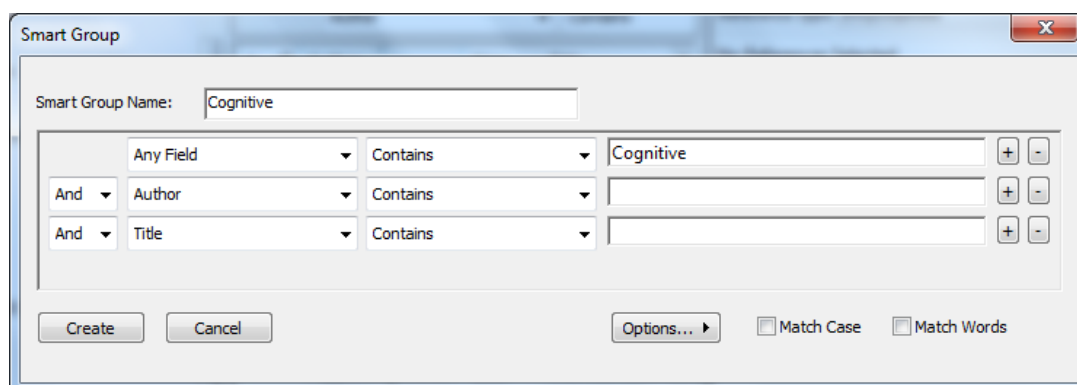
Smart groups are built with search strategies, for example, works by a particular author or matching some subject keywords. Smart groups are dynamically updated as you add references to and edit references in the library.

**Smart Groups will sync with your Basic (Online) account, but unfortunately will not display when you are using the web interface**

- 1 Go to the **Groups** menu and choose **Create Smart Group**

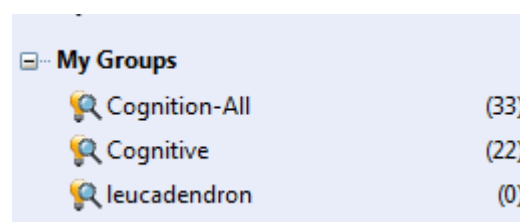


- 2 Type in a descriptive name for the group
- 3 Type in keywords that will match some of your references
- 4 Select Any Field from the menu



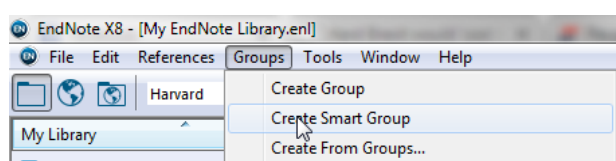
- 5 Click the **Create** button

Any references you have in your EndNote Library which match the search criteria for your Smart Group will automatically be filed in the group, as will any future references you add.



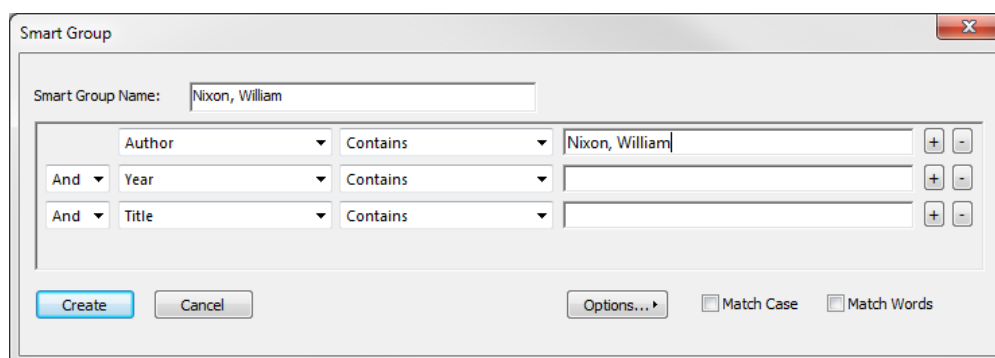
## Task 8: Creating Smart Groups

- 1 From the Menu select **Groups – Create Smart Group**





- 2 Fill the dialog box in as follows:

The 'Smart Group' dialog box is shown. The 'Smart Group Name' field contains 'Nixon, William'. Below this, there are three rows of criteria. The first row has 'Author' selected in the first dropdown, 'Contains' in the second, and 'Nixon, William' in the text field. The second and third rows have 'Year' and 'Title' selected in the first dropdowns, 'Contains' in the second dropdowns, and empty text fields. At the bottom, there are 'Create' and 'Cancel' buttons, an 'Options...' button, and two checkboxes labeled 'Match Case' and 'Match Words'.

Smart Group Name: **Nixon, William**

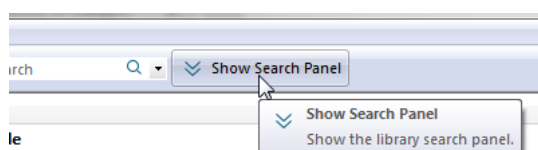
Author – Contains **Nixon, William**

- 3 Click Create

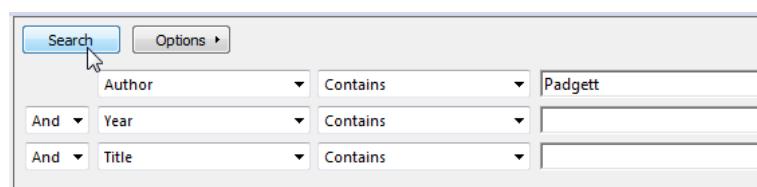
- 4 If you need to move the **Nixon, William** smart group to the **Thesis** group set  
We can also create a smart group from an existing search:

- 5 Select **All References**

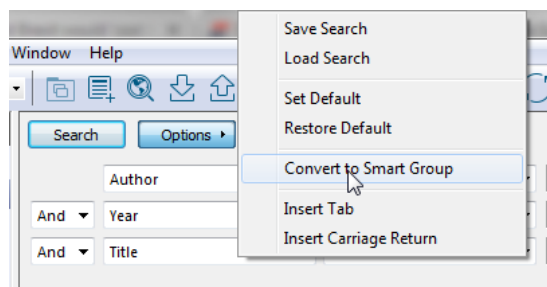
- 6 If there is no search panel available click **Show Search Panel** from the toolbar



- 7 Search for the Author **Padgett**

The 'Search' dialog box is shown. The 'Search' button is highlighted. The criteria are set to 'Author' contains 'Padgett'. There are also 'Options' and 'And' dropdowns for further refinement.

- 8 Click **Options – Convert to Smart Group**



- 9 Right click the **Converted Search** smart group and rename it **Padgett**

- 10 Drag the **Padgett** group to the **Thesis** group set if necessary

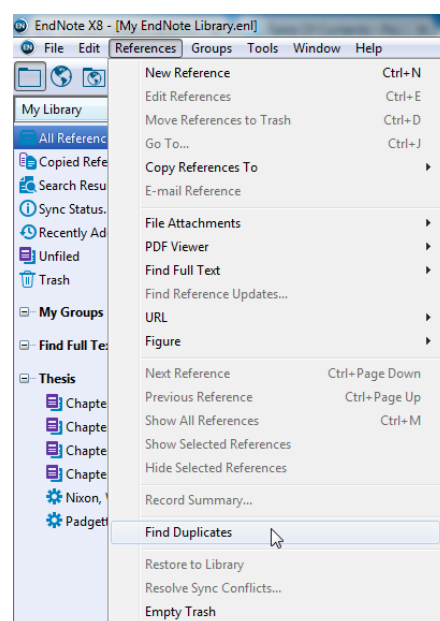
## e. Managing Duplicates

It is important to try to avoid duplicates of references in your EndNote Library. Duplicates can result in repeat references in bibliographies and these can be challenging to resolve. Endnote has an inbuilt tool to help you manage duplicate references.

The **Find Duplicates** tool is found inside the **References** menu.

When you select the command, EndNote will perform a search of your library. It looks for and identifies any references that it suspects are duplicates. Rather than deleting suspected duplicates automatically, EndNote creates a dialog box that displays side by side the found duplicates.

The user then can compare and select which record should be kept.



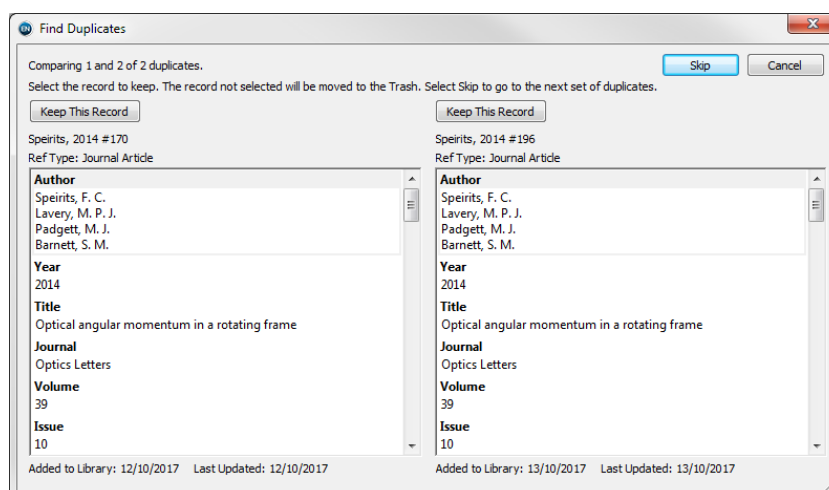
## Task 9: Managing Duplicates

To check if your Library has any duplicates,

1 Click the **References** menu

2 Select **Find Duplicates**

The Find Duplicates dialog box should appear.




3 Compare the two references, you can use the sliders to scroll through all the fields

4 Click the corresponding **Keep This Record** button to select the record that should be kept

## 7 Adding Full Text

EndNote can store not just the details but also the full text PDFs of references that you have found. You can do this in a number of ways, depending on if you already have the reference in your EndNote library.

### a. Find Full Text

EndNote can attempt to find and import full text (matching against the reference's Digital Object Identifier) from the web. To use this tool first select one or more references. Then select **References > Find Full Text**, or use the **Find Full Text** icon  on the toolbar.

EndNote will then perform a search.

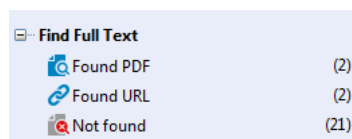
- If it finds a PDF copy of the reference's text, it will download and attach it to your reference
- It may alternately not be able to download a PDF, but will find a URL that links to it
- It may not find either the PDF or a link to it




The progress and results of the search will be displayed in your Groups pane.

Note that EndNote is unlikely to find the full text for all of your references.

### Task 10: Use the Find Full Text tool


- 1 Select **All References**
- 2 Click on any of the references in your library
- 3 Use **Ctrl-A** to select all records in your library
- 4 Click the **Find Full Text** button from the toolbar





Find Full Text	
 Found PDF	(2)
 Found URL	(2)
 Not found	(21)

The search results appear as groups in your **Groups** pane

- 5 Click on the **Found PDF** group. (If the group exists)



Author	Year	Title
 Janssens, Bas	2017	Unifying decoher
 Romero, J.; Padgett, M.	2014	Practical bound fi

The results displayed will have paperclips beside the references

- 6 Select one of the records
- 7 In the **Tabs** group, select the **Attached PDF** tab
- 8 Observe the preview of the attached PDF
- 9 Click on the Found URL group

- 10 Double click on the **Optical angular momentum in a rotating frame** reference
- 11 Scroll down to the **URL** field
- 12 Click on the URL to see the page that contains the full text
- 13 Select EndNote from the Windows task bar

## b. Adding PDFs to an existing record

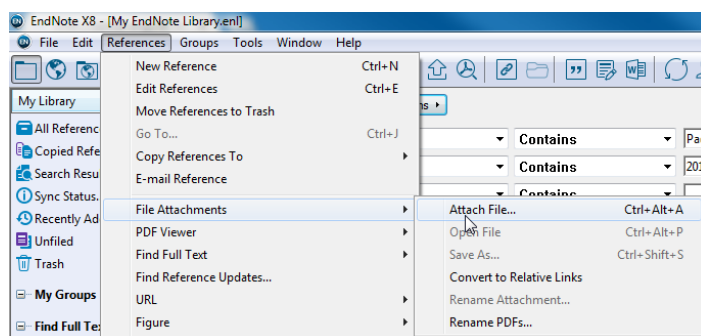
In the last task, we attempted to find the full text for our references. Some of those references were supplied as URL's rather than in PDF form. When this happens, we can often download the full document and then attach it to our existing reference.

PDFs can be manually added to a reference using **References > File Attachments** or with the paperclip icon in the record itself.

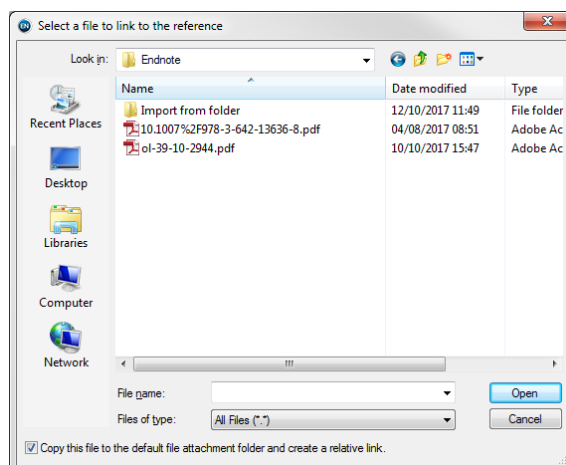
## Task 11: Attach a PDF to a reference

In this task, we will attach a downloaded file to the **Optical angular momentum in a rotating frame** reference. The file is already downloaded to your practice files folder

- 1 Click on the **Found URL** group
- 2 Select the **Optical angular momentum in a rotating frame** reference
- 3 Select **References – File Attachments – Attach File**



- 4 Navigate to your practice folder (Your instructor will tell you where to find it if you are unsure)



5 Select the file named **ol-39-10-2944.pdf**

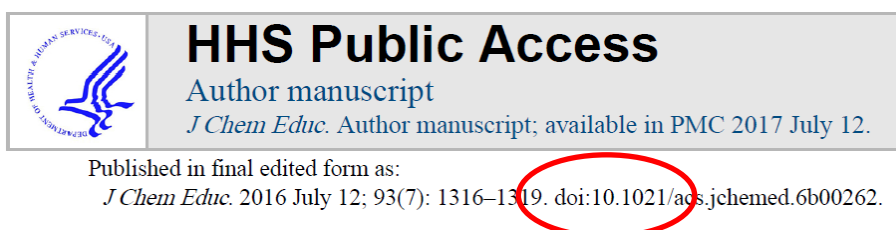
6 Click **Open**

The PDF will become available in the **Attached PDF** tab. Note that the reference does not save until you select another reference within EndNote

7 Select another reference

### c. Importing PDFs into EndNote

If you have a PDF, you can import it directly into EndNote and EndNote will create a reference for it. The quality of the data in the reference will depend on whether the PDF has a Digital Object Identifier (DOI) on the first page and that EndNote correctly identifies it.

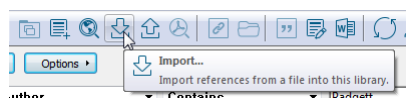


If EndNote cannot identify the DOI, It may create a blank record and you will need to add the details manually.

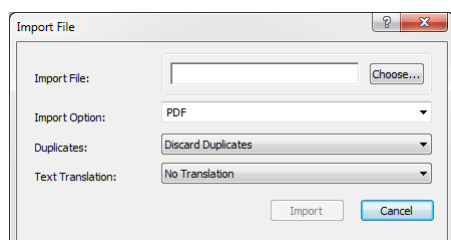
You can import PDF's file-by-file into Endnote, or you can attempt to import an entire folder.

### Task: Import PDF's into Endnote

1 Click on the import button  in the toolbar.



2 Change Import Option to PDF.



3 It is also recommended that you set Duplicates to Import into Duplicates Library. This will avoid duplicates being added into your main library.

4 Click on the **Choose...** button

The open dialog box will appear

5 Navigate to your practice files folder

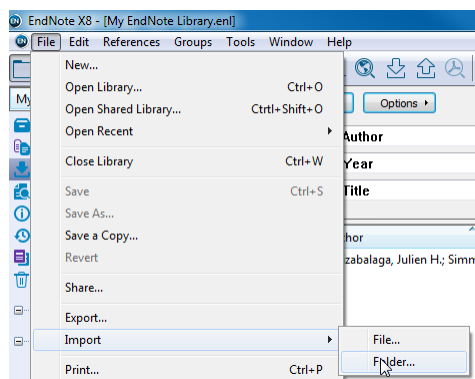
- 6 Select the **Arrizabalaga-2017-Fabrication of an Economical.pdf** file
- 7 Click **Open**
- 8 Click **Import**
- 9 Double click the now imported reference and examine the fields
- 10 Close the newly imported reference



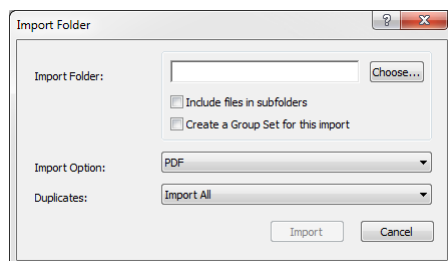
### Task 13: Import a folder

Importing PDFs a file at a time is time consuming, especially if you have collected many PDFs. In this task, we will import a folder.

- 1 Select **File – Import – Folder**

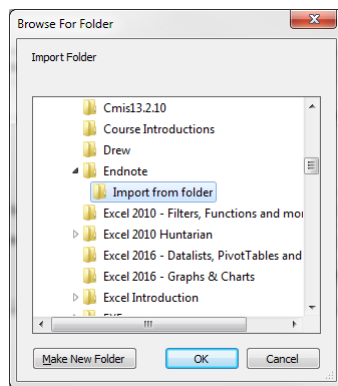


- 2 Make sure the **Import Option** is set to **PDF**



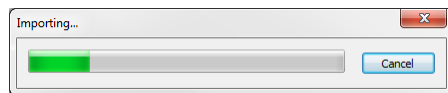
- 3 Tick **Include files in subfolders**
- 4 Set the **Duplicates** to **Import into Duplicates Library**
- 5 Select **Choose**
- 6 Navigate to your practice folder

- 7 Select the folder named **Import from folder**



- 8 Click **OK**

- 9 Click **Import**



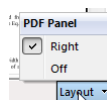
After a short wait, the PDFs will import into new references.

One of our imported PDFs does not have a readable DOI; unfortunately, its reference is not complete

- 10 Double click the incomplete reference

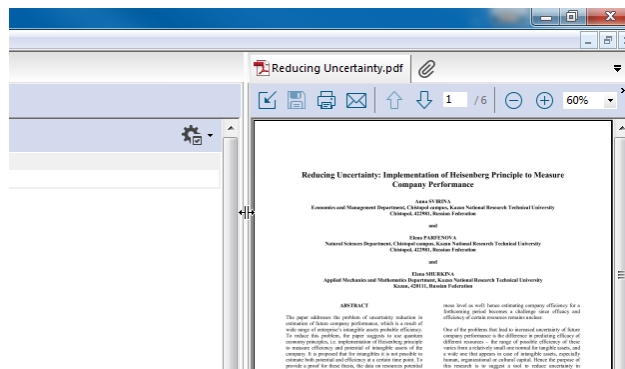
Author	Year	Title
Grinias, J. P.; Whitfield, J. T.; Guetschow, E. D.; Kenn...	2016	<Reducing Uncertainty.pdf> An Inexpensive, Open-Source USB
Haniszwski, Tomasz	2016	Conception of the Arduino Platform
Schultz, B. G.; van Vugt, F. T.	2016	Tap Arduino: An Arduino microcont
Zabala, Gonzalo; Moran, Ricardo; Teragni, Matias; BL...	2017	On the Design and Implementation

- 11 Click on the **Layout** button on the bottom left corner of the Endnote Application



- 12 If it is not already ticked, select **Right**

- 13 Drag the split pane so that the PDF preview is large enough to read easily



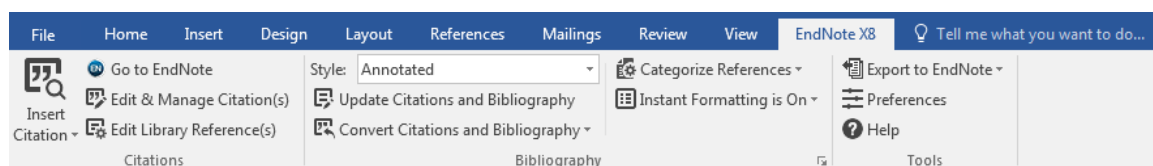
- 14 Highlight the title **Reducing Uncertainty: Implementation of Heisenberg Principle to Measure Company Performance** on the PDF

- 15 Right hand click the title and choose copy
- 16 Paste the title into the Title field on the right hand side of the screen.  
You can fill in many of the fields with information gleaned from the PDF file if you need to.

## 8 Creating a Bibliography: Using Cite while you write

EndNote works with Word to easily and quickly cite references, and create a paper with properly formatted citations, a Bibliography, figures, and tables.

This is all done using the EndNote X8 ribbon, which you will see in Word once you have installed EndNote Desktop on your PC.



The EndNote X8 ribbon will look like this

If you cannot find the EndNote X8 ribbon, please contact the IT Services Helpdesk via <https://www.gla.ac.uk/myglasgow/it/helpdesk/>

### a. Inserting Citations and Bibliographies into a document

The first time we add an EndNote Reference to a document it typically will take a bit of time. After that, references are added more or less instantly.

There are several different methods for adding a reference to a document we namely:

- Using the **Insert Citation** button from the EndNote X8 ribbon
- Using the **Insert Citation** button in the EndNote application
- Typing the reference details within {} curly brackets

No matter what method you do, providing that **Instant Formatting is On** (A setting in the EndNote X8 ribbon), the reference will be added, formatted and an endnote generated/updated.

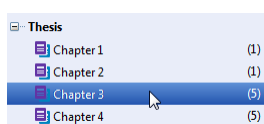
We can also edit citations to include prefixes, suffixes and page numbers should the referencing style we are using support this.

### Task 14: Inserting Citations into a Word Document

- 2 From the EndNote practice files folder open **Chapter 3.docx** Word document
- 3 Position your cursor where you wish to place a citation in the text. Remember to leave a space between the last character and your cursor, and ensure that your citation is placed before the full stop at the end of a sentence
- 4 Click the **Go to EndNote** button from the EndNote X8 ribbon  
You will be taken to the EndNote application



- 5 Select the Chapter 3 group from the Thesis group set



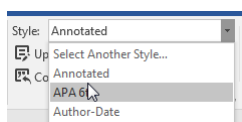
- 6 Select the reference you want to use

- 7 Click the **Insert Citation** button 

- 8 In a short while you will return to the Word document – the citation will now have appeared

- 9 If the citation is unformatted (i.e. in curly brackets) click the **Instant Formatting is Off** button and choose **Turn Instant Formatting On**

- 10 Select the style you want from the **Style** menu

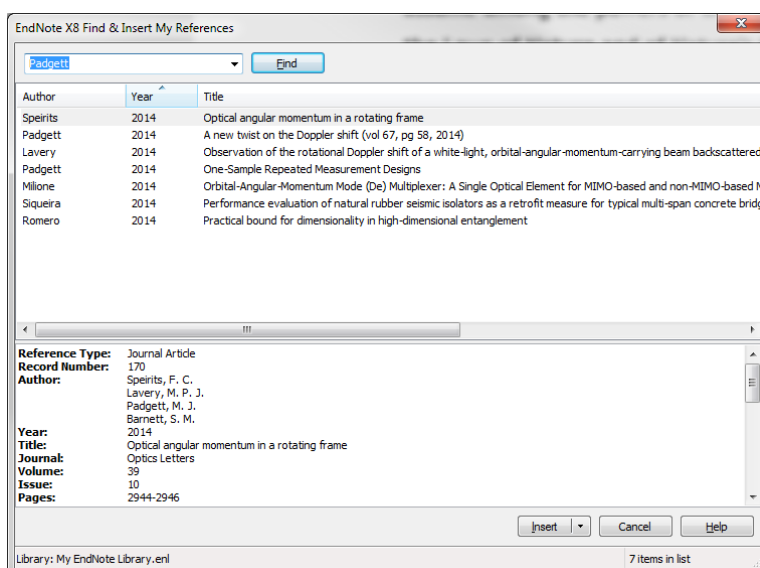


- 11 Position your selection where you wish to place the next citation in the text.

- 12 Click the **Insert Citation** button in the EndNote X8 Ribbon

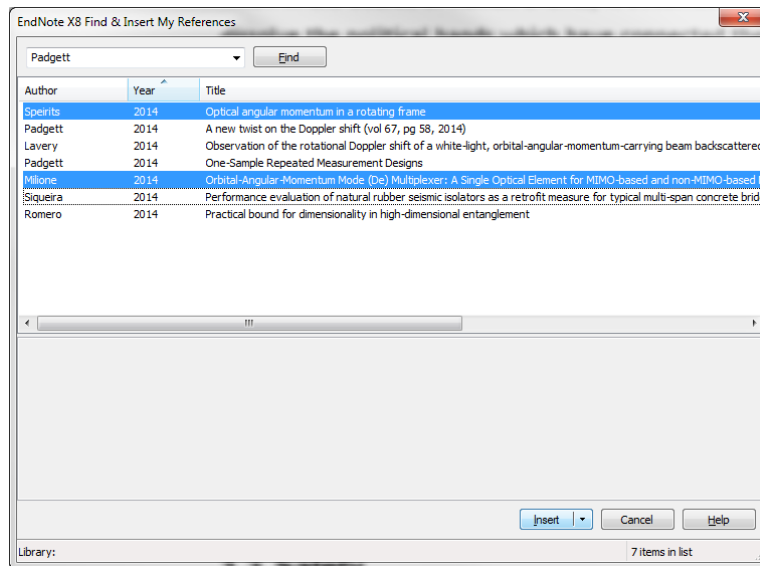


- 13 In the **Find & Insert My References** dialog box, fill in the search box with the name **Padgett**



- 14 Click **Find**

- 15 Select two references from the list that appears (hold the Ctrl key to make a multiple selection)



- 16 Click **Insert**

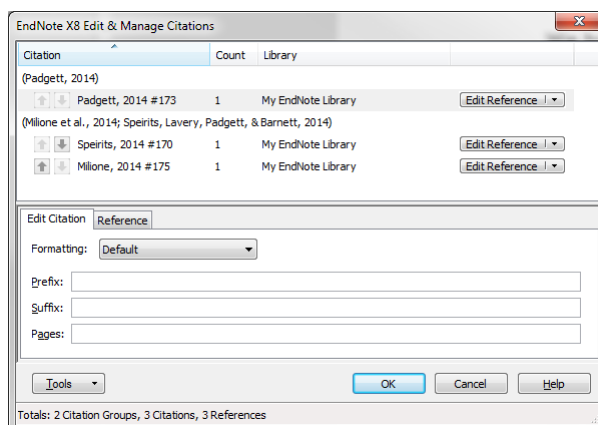
- 17 You should now have a correctly formatted citation and a bibliography at the end of your document (scroll to the end to see the bibliography)

Milone, G., Huang, H., Lavery, M. P. J., Nguyen, T. A., Xie, G. D., Cao, Y. W., . . . Willner, A. E. (2014). Orbital-Angular-Momentum Mode (De) Multiplexer: A Single Optical Element for MIMO-based and non-MIMO-based Multimode Fiber Systems. *2014 Optical Fiber Communications Conference and Exhibition (OFC)*.  
Padgett, L. (2014). One-Sample Repeated Measurement Designs. *Repeated Measurements and Cross-over Designs*, 25-52. doi:Book\_Doi 10.1002/9781118709153  
Speirits, F. C., Lavery, M. P. J., Padgett, M. J., & Barnett, S. M. (2014). Optical angular momentum in a rotating frame. *Optics Letters*, 39(10), 2944-2946. doi:10.1364/OL.39.002944

## b. Editing a Reference

Once you have a reference into a document, you can edit it to include additional information such as page numbers, a prefix or suffix.

Select the reference that you wish to edit and select **Edit & Manage Citations**



Fill in the fields that you wish to edit and click **OK**. If the Instant Formatting is on, you should see your edits appear. If the edits do not appear, the style that you are using does not support the additional information.



### **Task 15: Adding Page Numbers to a Reference**

- 1 Change the **Style** to **APA 6<sup>th</sup>** in the EndNote X8 ribbon
  - 2 Click on the first reference in your word document
  - 3 Click **Edit & Manage Citation(s)** in the EndNote X8 Ribbon
  - 4 In the **Pages** field type **113**
  - 5 Click **OK**
- The reference will update with the addition of p. 113

# Appendix 1

## Endnote Basic (aka Online or Web)

EndNote Basic is a FREE Web version of EndNote, which you may prefer to use off-campus.

Groups of records can be transferred easily between EndNote X8 Desktop and EndNote Basic, so you may choose to use the full software when you are in the University and the online version when you are at home. It is highly recommended that you use EndNote Basic to back up your EndNote references. You can also use EndNote Basic to share references and work collaboratively with others.

EndNote Basic provides 2GB of storage for attachments. However when you **sync** this with the Desktop version of EndNote you will be upgraded to a full account with unlimited storage space.

The upgraded account stays for two years from the point at which they are synced, after which time the web version reverts to “Basic”, however no references are lost. The account is upgraded for a further two years when it is linked to the latest version of EndNote Desktop.

### a. Registration

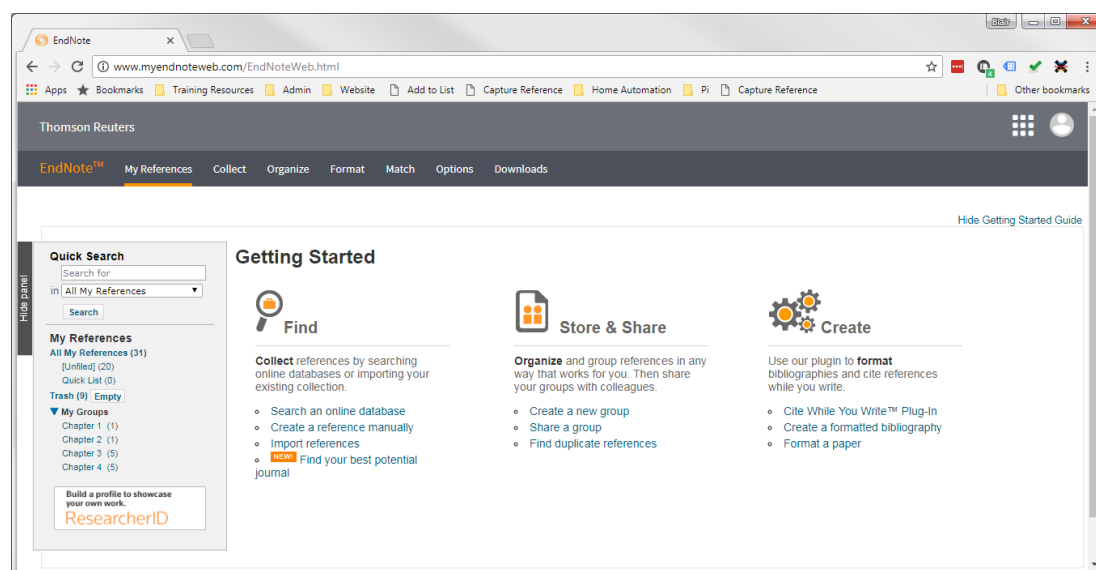
The first time you use EndNote Desktop you will be prompted to create an online account; this is probably the easiest method to create an account. It will also set up sync for you at the same time

Once you have registered, you can go to [www.myendnoteweb.com](http://www.myendnoteweb.com) and access the web based EndNote Basic

Alternately, you can register for an account at the above web address.

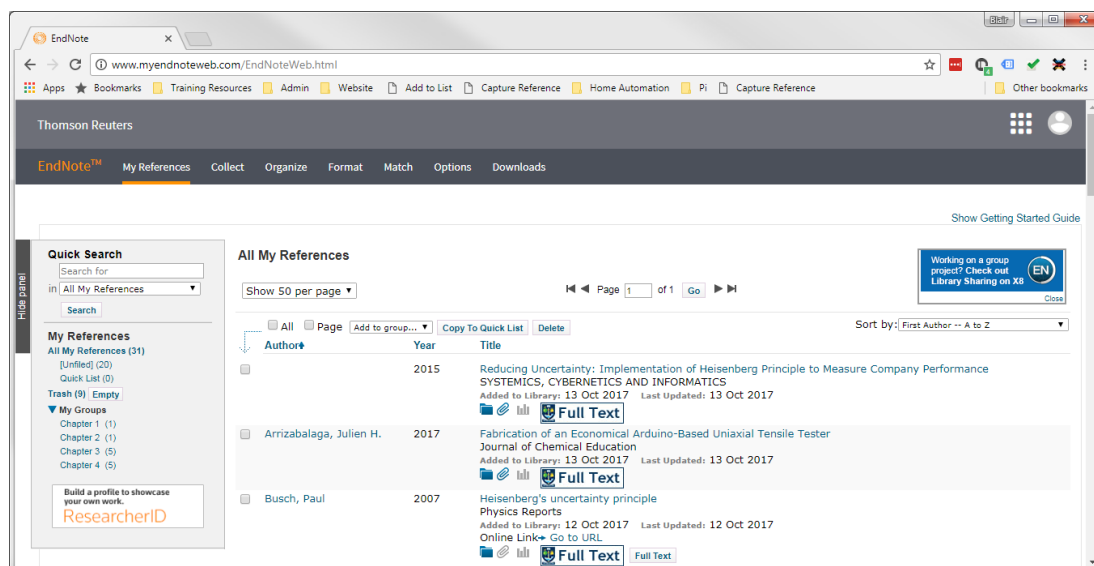
### b. Using EndNote Basic

Once you log in you will be EndNote Basic home page.



Note that initially the header of this page is **EndNote Basic** – when you sync your Library with EndNote Desktop, the basic disappears from the header (bottom image) and it displays just EndNote.

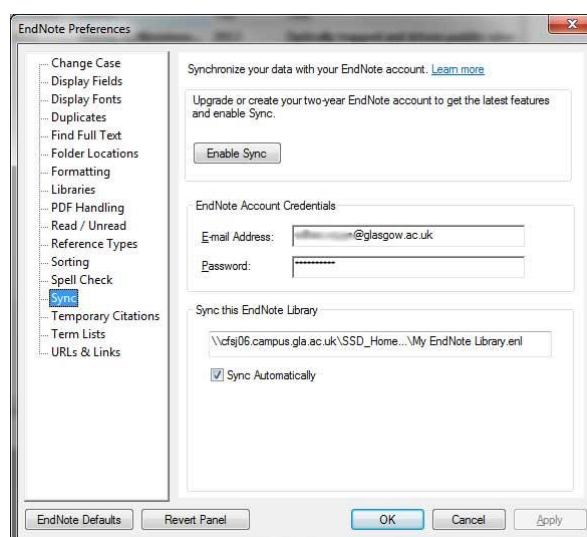
If you click on Hide Getting Started Guide (top right of the page), you will see your online EndNote Library



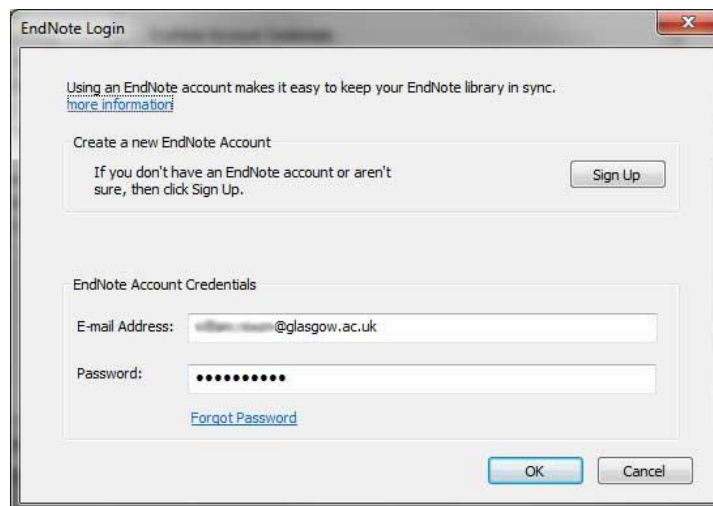
### c. Configuring EndNote Desktop to sync

To configure EndNote Desktop to sync with EndNote online you first need to enable this feature.

In EndNote Desktop go to **Edit > Preferences** and then select **Sync** from the left hand menu of options.



Provide your Endnote online login and password, if you do not already have one when you click on Enable Sync you will be offered the chance to create an account.



Click on OK and EndNote Desktop will connect to EndNote online and import any records to the desktop version. If there are already records in the EndNote Desktop database, EndNote will warn you and will merge them.

#### d. Installers and Web Capture Tool

EndNote Basic has a number of free downloads available including a **Capture Reference** to capture web pages and Cite While You Write plug-ins for Windows and Apple Mac.

These are available at Downloads

EndNote™
My References
Collect
Organize
Format
Match
Options
Downloads

**Cite While You Write™**

Use the EndNote plug-in to insert references, and format citations and bibliographies automatically while you write your papers in Word. This plug-in also allows you to save online references to your library in Internet Explorer for Windows.

**U.S. Patent 8,082,241**

See [Installation Instructions and System Requirements](#).

[Download Windows with Internet Explorer plug-in](#)  
[Download Windows MSI for mass program installation](#)  
[Download Macintosh](#)

**Capture:** Capture Reference

To install the Capture tool, just drag the **Capture Reference** button to your Bookmarks bar (also known as "Favorites Bar" or "Bookmarks Toolbar"). In some browsers, you may need to right-click and select "Add to Favorites" or "Bookmark This Link."

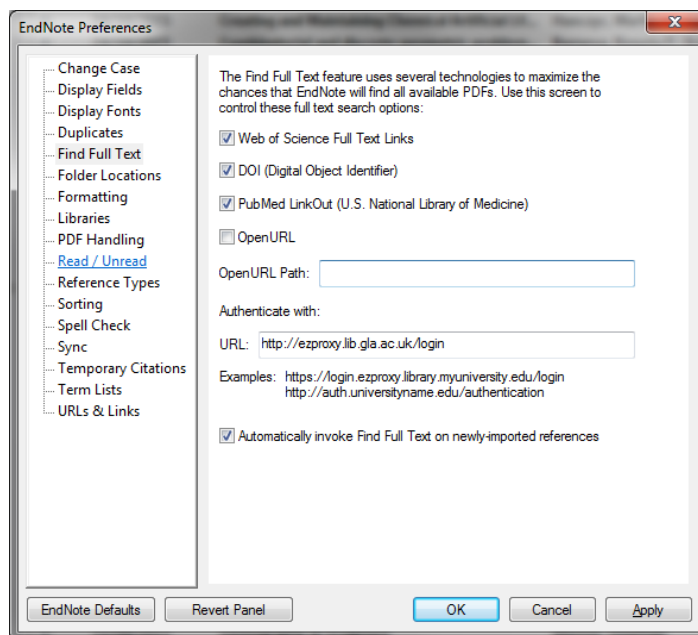
To use it, browse to a page you like and click the **Capture Reference** button in the Bookmarks bar. The Capture Reference window will open. Follow the instructions in the window.

## Appendix 2

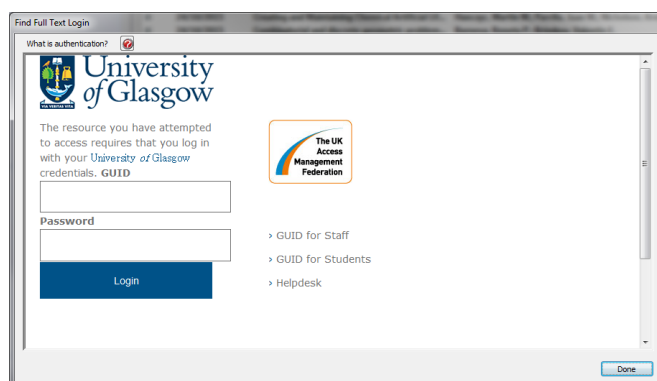
### Advanced Preferences: Find Full Text

To enable Find Full Text if you are using EndNote Desktop on a PC or laptop off-campus you need to provide the University's EZproxy URL

- 1 Select **Edit - Preferences - Find Full Text**
- 2 In the **URL** field under **Authenticate with:** add
- 3 `ezproxy.lib.gla.ac.uk/login`
- 4 Then click on **Apply**



- 5 In EndNote, right click on a record and select Find Full Text > Authenticate.
- 6 Login with your GUID



- 7 Click **Done**

Note: Depending on the record and availability of the PDF not all searches will return full text.

## Appendix 3

### Generating a combined Bibliography, having merged all Chapters of a Thesis

#### a. Method 1

If you create your thesis work in individual chapters, you will then require to combine all chapters (placing section breaks between each - the Bibliography for each chapter will appear at the end of each section).

- 1 You should then cut the Bibliography at the end of the last chapter inserted (e.g. chapter 5) and paste it at the point in the combined file where you wish the full Bibliography to appear.
- 2 From that point, you then click **Update Citations and Bibliography** on the EndNote tab. The full Bibliography will be generated at this point.
- 3 Check all references are correct and featured in this new full Bibliography, then delete those at the end of each chapter.

#### b. Method 2

- 1 In each Chapter, from the EndNote X8 ribbon choose the drop down arrow on **Convert Citations and Bibliography** and click **Convert to Unformatted Citations**.  
All citations will be converted and the automatic bibliography at the end of each document will disappear.
- 2 Re-save each chapter.
- 3 Then, once you have combined all chapters together, sit at the point in the combined file where you wish the full Bibliography to appear.
- 4 Click **Update Citations and Bibliography** on the EndNote tab.



# Useful Shortcut keys

## Function

Creates a new reference

To select more than one reference

Selects a range of references

Opens selected references

Closes the active window

Selects the next field

Selects the previous field

Open Library

Close Library

Save

Exit

Undo

Cut

Copy

Paste

Select All

New Reference

Edit References

Move References to Trash

Go To

URL > Open URL

Next Reference

Previous Reference

Show All References

Search Library

Help Contents

## Shortcut

Ctrl + N

Ctrl + Click

Shift + Click

Ctrl + E

Ctrl + W

Tab

Shift + Tab

Ctrl+O

Ctrl+W

Ctrl+S

Ctrl+Q

Ctrl+Z

Ctrl+X

Ctrl+C

Ctrl+V

Ctrl+A

Ctrl+N

Ctrl+E

Ctrl+D

Ctrl+J

Ctrl+G

Ctrl+Page Down

Ctrl+Page Up

Ctrl+M

Ctrl+F

F1