Library Services

Introduction to Endnote 20 Workbook

1. Working with EndNote Libraries

1.1 Starting EndNote

Download to your device

EndNote for Windows and Mac is available to download on your device. You can access the links to the downloads and instructions from the Library EndNote webpage. You will need your College username and password to log in.

Access via the Software Hub

When using College PCs, or devices where you do not have the admin rights to install software, EndNote is available via the Software Hub (Windows only). You do not require a key or any installation instructions. Instructions on how to access EndNote via the Software hub can be found on the Library EndNote webpage.

1.2 Opening and creating EndNote Libraries

In EndNote each collection of references is known as a 'library'. Each library is a separate file with the suffix **.enl,** and a folder with the same name as the library ending **.Data.** The .Data folder is created in the same directory as the library. Both file and folder must be kept together.
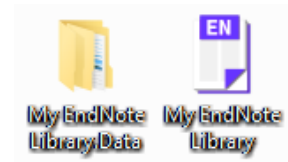
To create a new library.

- Select **New** from the **File** menu. In the **File name** field, type the name of the new library and **Save**.

1.3 Backing up and compressing EndNote Libraries

You should back up your library whenever you have made changes or additions. If you create or amend filters, output styles or connection files, it is a good idea to back up the entire EndNote directory on occasion. You can save your complete library (the .enl file as well as its associated .Data folder and all of its contents) to a single compressed .enlx file in order to easily back up your library or send a copy to a colleague. Later, you can easily restore (unzip) the compressed library with EndNote.

To save to a compressed library file:

- Open the library in EndNote.
- From the **File** menu, select **Compressed Library (.enlx)** then click on **Next**.
- Use the file dialog to save to an EndNote Compressed Library (.enlx).

To restore a compressed library file:

- Use EndNote to open the **.enlx** file as you normally would to use the library.

To avoid problems with your library:

- **Remember to keep both files together and create a backup of your Library.**
- **To avoid corrupting the file, do not save the library to the cloud.**

1.4 Importing Terms Lists

It is recommended that before adding references, you import what are known in EndNote as Term lists. These are lists of stored terms such as journal titles and their official abbreviations, Author names and keywords. These enable you to cite them more consistently. Since different databases store the information differently e.g give the initials / full names of authors or the abbreviated / full name of the journal titles. Different reference styles require names to be displayed in different ways and importing term lists means that EndNote knows how to do this e.g. can abbreviate journal titles where the full name was imported and vice versa.

To import a text file that contains the terms:

- From the **Library** menu select **Define Term Lists**.

- Select the **Lists** tab, ensure the correct list is highlighted, and click on **Import List**. For Mac users locate and open the EndNote Terms Lists folder by going to **Applications** > **EndNote20** > **Terms**

- Select the text file to be imported. For journal names, select the category that applies, and click **Open.** The new terms are imported and sorted alphabetically into the existing term list. This import must be done for each library that you want to use these terms.

- The lists are not exhaustive, so if you can't find your journal in the list, this can be added manually by clicking on the **Terms** tab and then clicking on the **New Term** button.

The most commonly used Terms list is the Journals term list that stores abbreviated journal names that EndNote can substitute for the full journal name in a bibliography. Instructions on how to do this can be found in Changing the Format of the Journal Title.

2. Adding references to your EndNote Library

2.1 Direct export from online search tools

Most websites and databases contain a direct export/download button that will send your search results directly to EndNote.

2.1.1   Example using PubMed

- Have your Endnote Library open. Then in your browser go to http://pubmed.gov

- Perform a search, select the first 3 references by ticking the boxes on the left of the references.

- Click on the **Send to** button above the list of results and select **Citation manager** and click **Create File** to export the references to EndNote.

For Internet explorer users: References will be imported directly into Endnote.

For Microsoft Edge: After clicking **Create File**, Click on **Open** at the bottom of the browser.

For Chrome users:

- After clicking **Create File** a box will appear at the bottom left of the browser.

- Ensure EndNote is open, click on the box in the browser. The references will then be imported straight into Endnote.

For Firefox users:

When you click on **Create File** a box will appear. Leave the option as **ResearchSoft Direct Export Helper** and click **OK**. The references will then be imported straight into Endnote.

2.2 Importing references from a text file and other extra steps

Some database providers don't have a direct export option and require you to export your results to a text file which can then be uploaded to EndNote, or requires extra steps depending on the browser used. One example is The Cochrane Library.

When you download references as a text file from databases you need to make sure that you save them in a format compatible with EndNote. Few databases use the same format so it is impossible to provide detailed instructions for every resource.

2.2.1 Example using The Cochrane Library – for Chrome users

- In your browser go to http://www.thecochranelibrary.com

- Perform a simple keyword search in the Cochrane Library and select a few references for export.

- Click **Export Selected Citation(s)** and the Export Options dialog box will open.

- Select the format **RIS (EndNote)**

- If you want to include the abstract click the box and then click the **Download** button.

- The file will appear at the bottom of the browser. Click the arrow on the file box and select 'Open'.
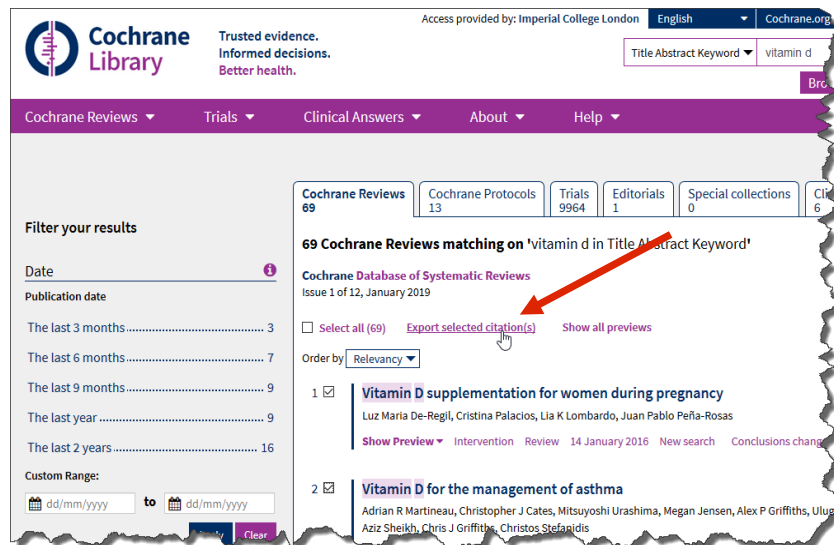
- In some instances you may have to save the file to your computer and import the file via EndNote. To do this, in the main menu of EndNote go to **File**, select **Import** then select **File** and navigate to your saved text file.

- Select the resource you are importing from as your Import Option, then click the **Import** button.
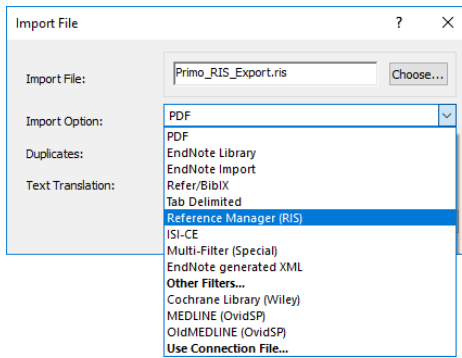
2.3 Importing PDF files to create new references

With this feature you can import saved PDF files, and folders containing collections of PDF files, which are then converted into EndNote references with the full text attached. This is done by extracting Digital Object Identifiers (DOI) from these files. The bibliographic content from the PDF files is captured and added to your EndNote library.

- Open the EndNote library into which you want to import the references.

- From the **File** menu, choose **Import** and then select **File**.

- Click the **Choose...** button and locate the file to import.
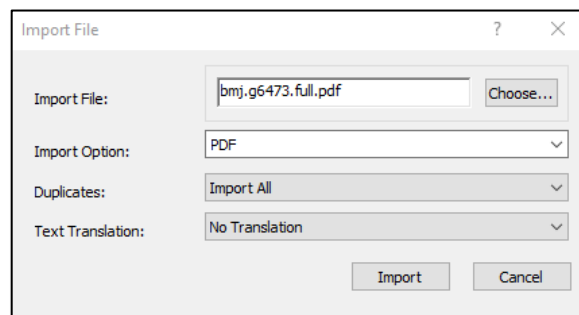
Select the PDF **Import Option** from the drop-down list.

- Select an option from the Duplicates list:

    o **Import All**: imports all references including duplicates.

    o **Discard Duplicates**: imports all references except duplicates.

    o **Import into Duplicates Library**: duplicates are imported into a separate library.

- Choose a **Text Translation** option if necessary. For most text files this will be **No Translation**.

- Click **Import** to import the file.

2.3.1 Importing a folder of PDF files into EndNote

- Open the EndNote library into which you want to import the references.

- From the **File** menu, choose **Import** and then select **Folder**. Then follow the same steps as above.

Please note: documents must have been created as PDFs and contain a DOI for this feature to work. This data retrieval function will not work with scanned documents.

2.4 Adding references manually

There will be times when you will need to add references manually by typing them into the Reference window. For this example we are going to use the following citation:

> *Michael Foote, Arnold I. Miller. Principles of Palaeontology. 3rd ed. New York:*
> *W. H. Freeman & Co Ltd; 2007.*

To enter references manually:

- Make sure that your required library is open.

- From the References menu, select **New Reference** or press Ctrl+N.

- In the Reference Type box, click on the drop-down menu to select an appropriate reference type, e.g. Book.

- To add information to any field, select the desired field by left-mouse clicking on the field and making sure the cursor is blinking on the field. You can also select a field and its contents by pressing the **TAB** key to move to the field. **SHIFT+TAB** selects the previous field.

2.4.1 Author Field

To add author names select the **Author** field and enter one author name per line.

- Enter the last name of the first author followed by a comma "," and then the first name. If you are entering initials instead of the full names type a full stop "." between the initials or put a space between them, otherwise EndNote treats the initials as a single name. Alternatively, you can enter the author's first name, then surname with no added punctuation. If the author entry appears in red text it means that the author name is new to this library and does not exist in the corresponding term list. When you have finished press Enter to go to the next line.
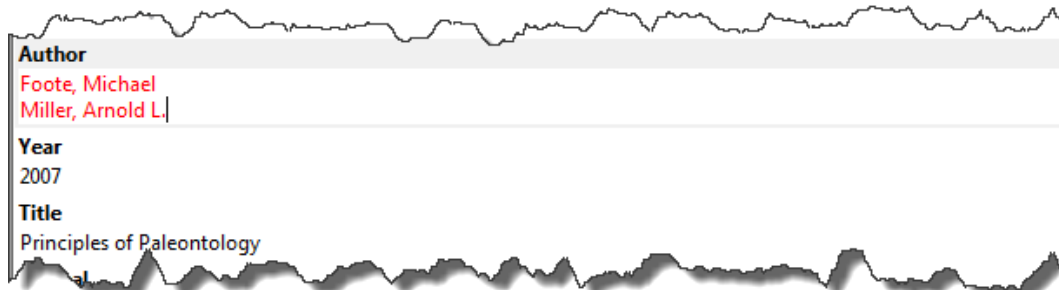
- Enter the second author's name on a new line. As you type, EndNote may display a highlighted suggestion if it finds a match in the author term list. This is because the "Suggest terms as you type" feature of the Term Lists under Preferences has been turned on. To accept the suggested term, simply press Enter. (There is no highlighted suggestion in the above example. This is because it is the first time that the authors' names have been added to this library.)

There are three fields in EndNote that are associated with Term Lists, these fields are; Author and Editor names, Journals, and Keywords. However, term lists can also be created for other fields. These lists are updated automatically as you enter new terms into these fields.

The term lists are saved in the .Data folder of the library. Term lists help with data entry and improve accuracy and consistency.

2.4.2 File Attachments

You can use the **File Attachments** field to store a link to a PDF or any other electronic file. In a reference, when you link a file to the **File Attachments** field you will have the choice of saving a relative or absolute link to the file.

- Select your reference, then from the **References** menu, choose **File Attachments** and select **Attach File,** or click on the + **Attach File** button at the top of the **Summary** view of the record.

- In the **Select a file to link to the reference** dialog box, navigate to your chosen file and click **Open**.

Note the check box on the bottom left of the Window: **Copy this file to the default file attachment folder and create a relative link**. This will give you two options:

a) **Relative Link:** when the box is checked, a copy of the original file will be created and placed in the .Data folder of the corresponding EndNote library.

b) **Absolute Link:** when the box is un-checked, EndNote will create a full path and filename to the original file. However, you should remember that the absolute links are static not dynamic. This means if you ever change the location of the file the link will not work and EndNote will not be able to access the file unless you update the field with the new link.

2.4.3 Saving the reference

You can save a reference as you go along by clicking on the **Save** button from the top right-hand corner of the record, which appears in the right-hand column in EndNote, or press **Ctrl+S**. You can also click on the 'x' at the top right-hand corner of the window and this will prompt you to save and close the reference.

2.5 Adding figures, charts and tables

The **Figure, Equation**, and **Chart** or **Table** reference types should be used if you are going to use the **Cite While You Write** feature and Microsoft Word to insert and manage images in your documents. This section shows how to add a new **Figure** reference which will be used later in the section on **Cite While you Write (CWYW).**

- From the **References** menu, select **New Reference** or press **Ctrl+N**.

- From the **Reference Type** list, select **Figure** or **Chart or Table** if it's an excel spreadsheet, as your reference type.

- Add a title for your figure in the Title field.

- The **Figure** field can be used to insert a graphic file or an object (a file attachment) into a reference. The copy of the image or the object is saved in the .Data folder of the library. Each reference can accommodate only one graphic or object file. To insert an image or object into a reference, from the Reference menu, select **Figure** and then **Attach Figure**.

- Another box will appear allowing you to locate the required image file, then click **OK**.

- Use the **Caption** field under the **Figure** field, to write a short description for your file which will appear with the image in a word processing document using Cite While You Write feature.

3. Search a Remote Database

You can search a database from within EndNote using **Online Search**. Search results are downloaded to a temporary library, allowing you to browse and select required references and add them to your EndNote Library.

To do this:

- Click on the **Online Search** menu to expand it, found in the pane on the left-hand side of EndNote. You will see a small selection of databases. Click on **+** to see the full list. If you select one from the full list, it will be added to the list in the menu.

- To connect, click on the resource name (e.g. PubMed) under the **Online Search**. If you are asked for a username and password do not enter any details, simply click the **OK** button and you will be connected to the appropriate resource.

- When the connection has been established, EndNote opens the search tab for the resource ready for you to enter your search terms.
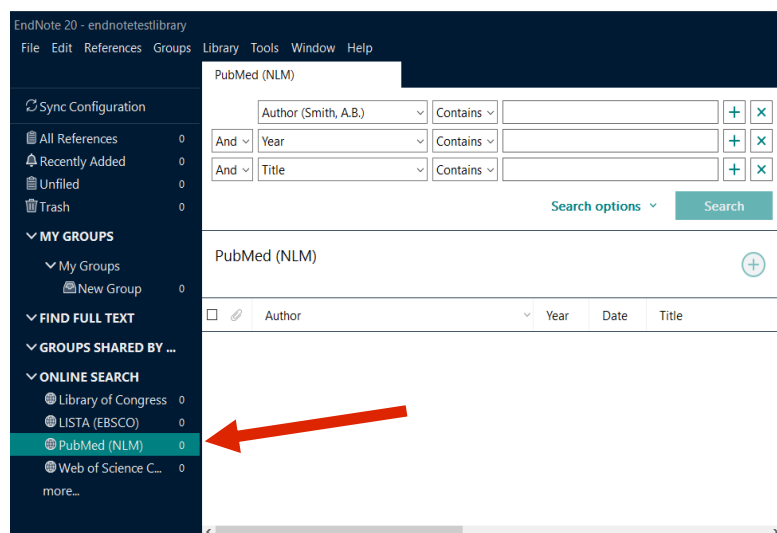
3.1 Search the database

- From the field list drop-down menu, select the field you wish to search in, e.g. *Title*. Enter your search term. Note that the comparison list is restricted to *contains* for most remote searches.

- The example shows the search using a second term, *Year Contains 2001*, and the command language **And** to narrow the down the results.
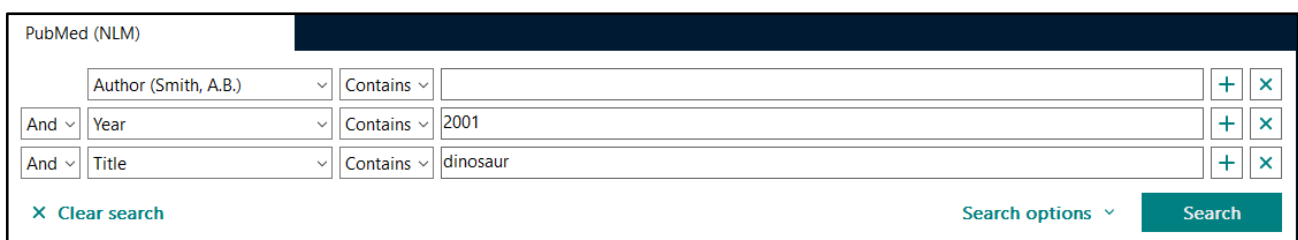
- When you have entered your search terms, click on the **Search** button. EndNote sends the search request to the remote database which returns the number of references that match.

- The window displays the number of references retrieved by the search. EndNote automatically downloads the first 25 results. If you want to see additional results, you have the option above the list of results to view further results.
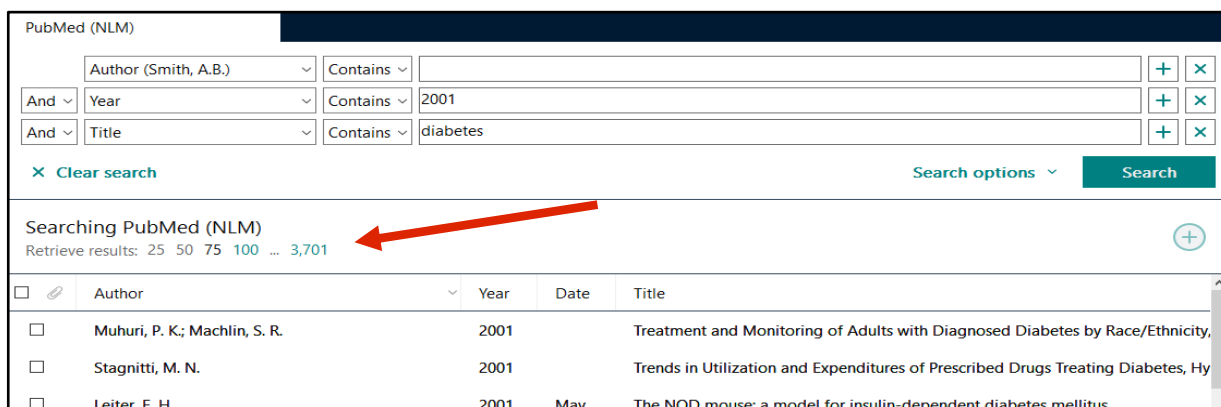
3.2 Save the references

- Select the references you want to add to your EndNote Library or tick the box at the top of the results list to select all the references displayed.

- To save to your main library click on the plus icon above the list of references.
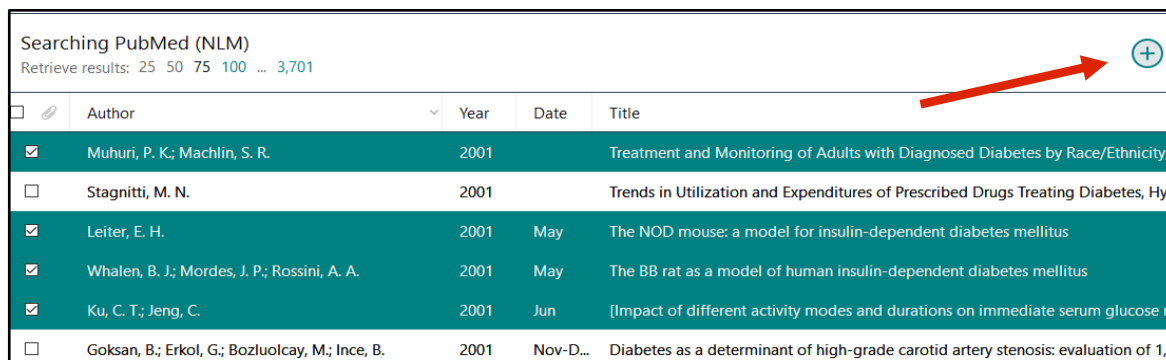
- To save the references to a group, right click on the references and select **Add References To** and then select the group.

4. Managing References

4.1 Editing references

- Click on the reference you would like to edit. The reference will appear in a separate preview window on the right, select the **Edit** tab. Click in the field you wish to change, add, delete or edit text.

- To save the changes click on the green **Save** button at the top of the preview window. If you forget to save the changes, you will see a message prompting you to save the changes (unless you have previously ticked the box to not display the message again).

4.2 Updating references

Individual references can be updated by retrieving additional or new information from sources such as Web of Science and PubMed.

- Highlight reference(s) to update and select **Find Reference Updates** from the **References** menu. If EndNote cannot find any updates a dialog box will appear advising this.

- The **Review Available Updates** dialog box will open and display both the existing and updated reference. Fields where the data is different are highlighted.

- Click the **Update All Fields** button to accept all available field updates, this will overwrite any existing data in these fields.

- Click the **Update Empty Fields** to update only those fields which are currently empty.

- If you wish to update only specific fields, you can copy and paste data from the new reference into the existing reference.

- Click Save and continue to save amendments, Skip to move to the next reference or Cancel to stop.
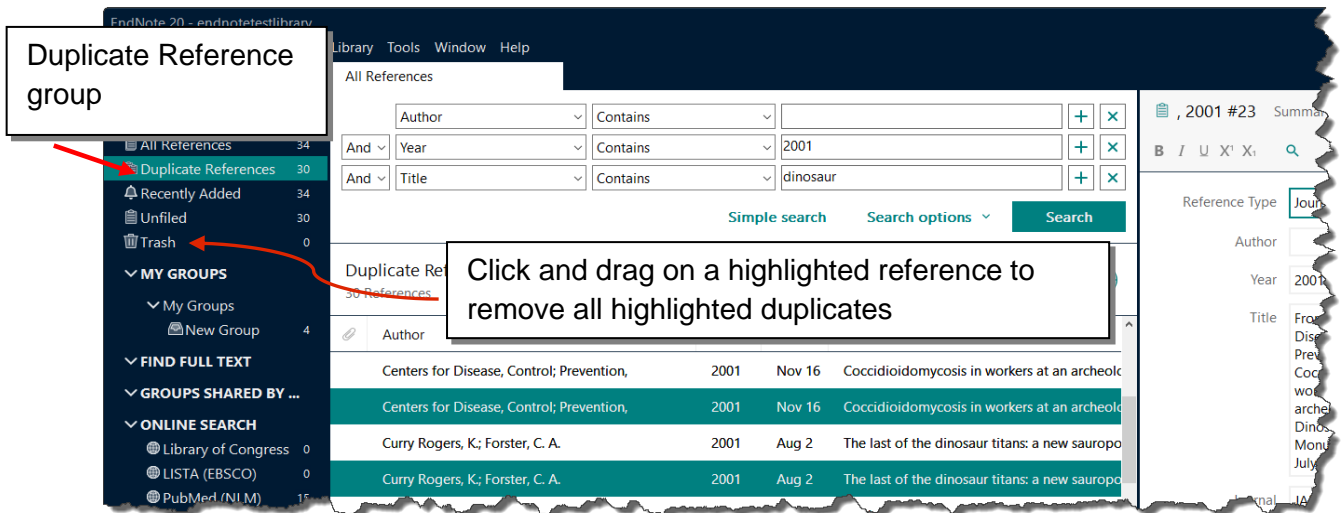
4.3 Removing duplicates

There are 2 ways you can remove duplicates. You can remove them individually using the **Find Duplicates** dialog box, or remove them in bulk by highlighting them in the list.

- Make sure that your required library is open and **All references** list selected.

- From the **Library** menu, select **Find Duplicates**.

- If no duplicates are found, a message will be displayed. If duplicates are found they are displayed in the **Find Duplicates** dialog box, where you can compare duplicates and decide which version to keep and which to delete.
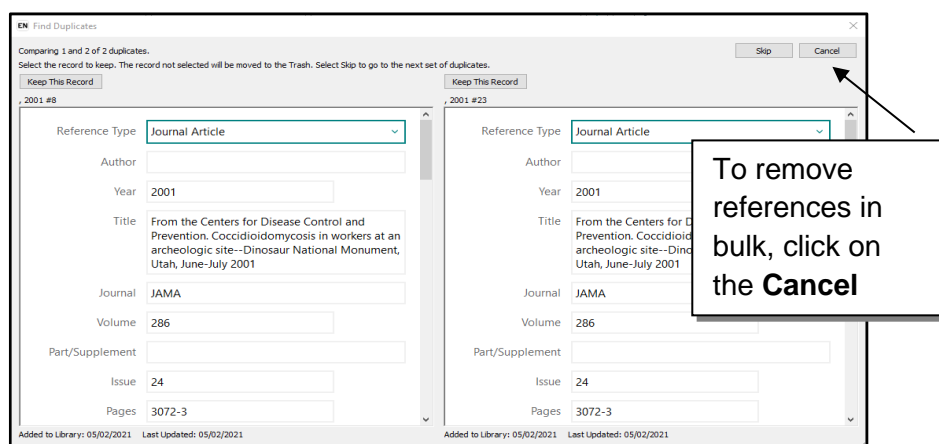
To remove duplicates in bulk:

- Click on the **Cancel** button in the **Find Duplicates** dialog box and a list of references with the duplicates highlighted will display. A separate **Duplicate References** group will automatically be created in the navigation pane.

- To remove all the duplicates, simply click on one of the highlighted references and drag them to the **Trash** in the navigation pane on the left hand side, or right click on one highlighted reference and choose **Move References to Trash**.

By default, checking for duplicates only compares the Author, Year, Title and Reference Type fields. To add or remove fields for detecting duplicates, click on **Edit** – **Preferences - Duplicates**.

4.4 Deleting References

- Select the reference(s) in the Library window by highlighting them.

- Right click on the reference(s) or from the **References** menu, select **Move References to Trash**, or press **Ctrl+D**. Deleted references are moved to the Trash group where they will remain until you choose to empty trash from the **References** menu or when prompted on exit.

- To restore deleted references to your EndNote Library, select the **Trash** group, highlight the reference(s) you wish to restore and either drag them into the **All References** group, right click and select **Restore to Library** or from the **References** menu, select **Restore to Library**.

4.5 Find Full Text

The **Find Full Text** feature will attempt to locate and download full text files for your references. The best results are obtained when connected to the Imperial College network either on Campus or via VPN. (For further information on setting Preferences to optimise retrieval of Full Text articles, please see Appendix A: Configuring Full Text and OpenURL settings).

If EndNote cannot find the full text file, it will often be able to attach the URL of the article for easier future access.

To find and retrieve full text:

- Select the reference(s) to which you want to add full text.

- From the **References** menu, select **Find Full Text** or click on the **Find Full Text** button on the EndNote toolbar.

EndNote begins searching for and downloading full text for the selected references. References appear in groups under a **Find Full Text** group set.

Four different groups may appear: **Searching…**, **Found PDF**, **Found URL** and **Not Found**
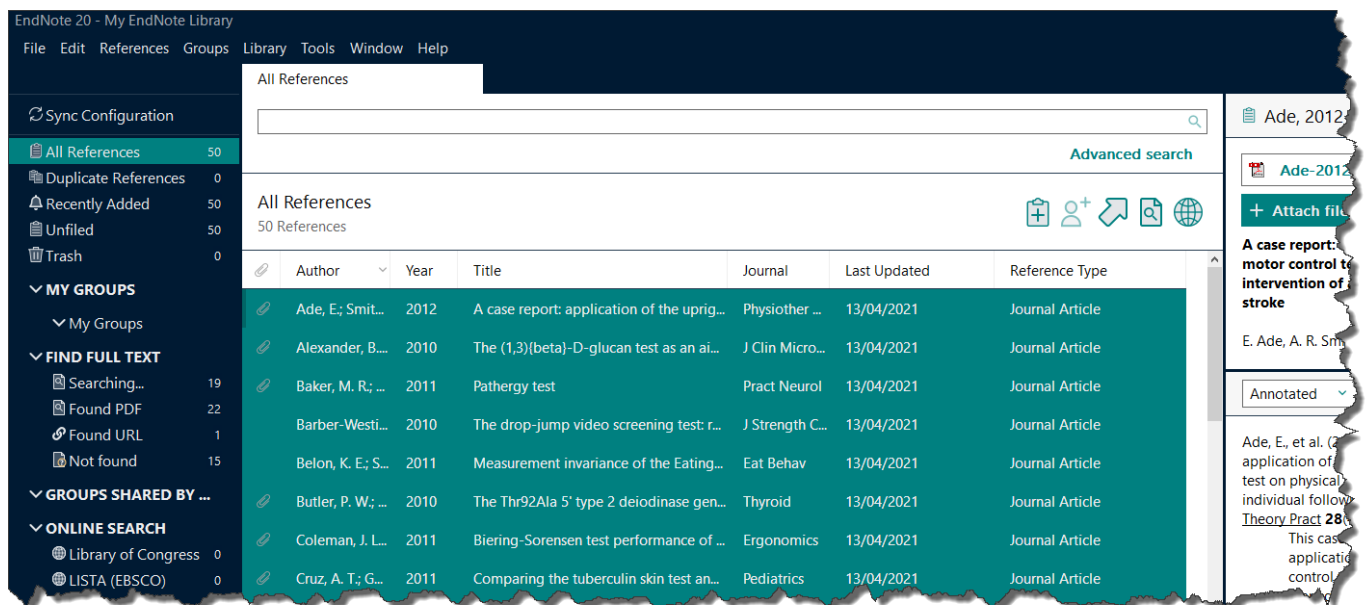
You can pause or cancel the **Find Full Text** operation, by right clicking on the Searching group, and select *Pause finding full text* or *Cancel finding full text*.

Full text that has been retrieved until that point is already saved in the library. To resume a paused **Find Full Text** operation, right click on the **Searching** group and select **Resume finding full text**.

The **Find Full Text** temporary groups remain for the current session but disappear when you close the library. Full text downloading happens in the background, which may affect the performance of other operations.

When a full text file is downloaded and attached to a reference, a file attachment icon appears in the **File Attachment** field for the reference.

In the Library window, a paper clip icon appears in the **File Attachments** column for that reference.
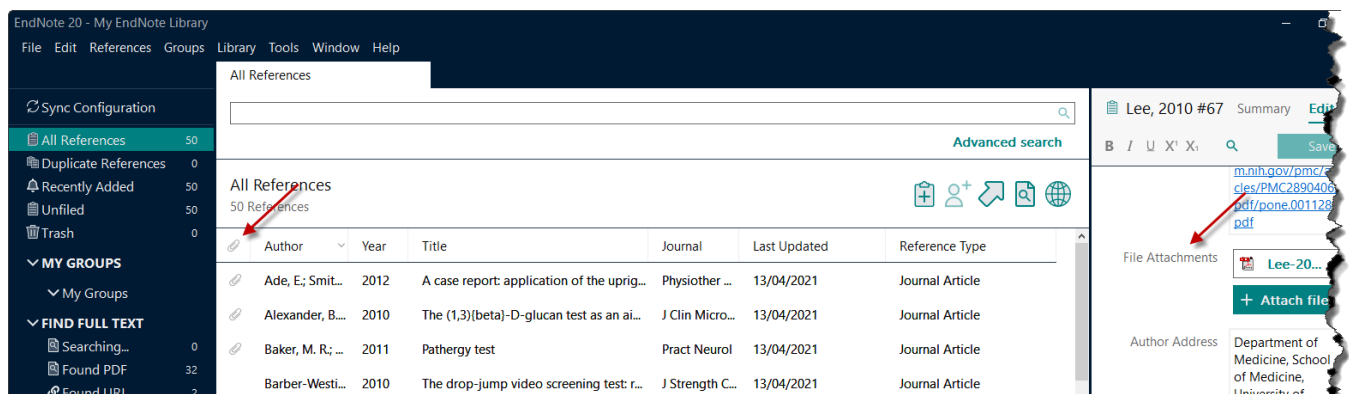
If **Find full text** doesn't work then you can manually add the attachment.

4.6 Organising references 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.

Automatically generated groups include **All References**, **Unfiled** and **Trash**. Custom groups and smart groups are created by you to help organise your library. The left pane of the Library window lists all of the groups in the current library.

4.6.1 To create a new group

- From the **Groups** menu, select **Create Group** or right-click in the **Groups** pane on the left-hand side of the screen and select the option **Create Group**.

- The new group is displayed in the left pane with the name **New Group** highlighted, rename the group by typing in the new name.

4.6.2 To add references to a group

- Highlight the reference(s) and use one of the following options:

    o Use the mouse to drag and drop the reference(s) to the desired group.

    o Move the mouse over the highlighted reference(s), right click and select **Add References To**, then select the desired group name.

    o From the **Groups** menu, select **Add References To**, then select the desired group name.

4.6.3 To create a new smart group:

A smart group is a custom group that contains a search strategy. Any reference that is added or modified that matches the search strategy will automatically be added to the smart group.

- From the **Groups** menu, select **Create Smart Group** or right-click in the **Groups** pane on the left-hand side of the screen and select the option **Create Smart Group**.

- Give it a name and enter the search strategy for your group and click **Create**.

- The new group is displayed in the left pane.

4.6.4 To create a group set

You can organise your references by creating Group Sets. These can contain any combination of custom groups and smart groups.

- From the **Groups** menu, select **Create Group Set** or right-click in the Groups pane on the left hand side of the screen and select the option **Create Group Set.**

- The new group set is displayed in the left pane with the name **New Group Set** highlighted. Rename the group by typing in the new name. You can drag groups to move them from other group sets to the new group set, or you can create new custom groups, smart groups and combination groups under the new heading.

Group Set
Related groups can be grouped together.
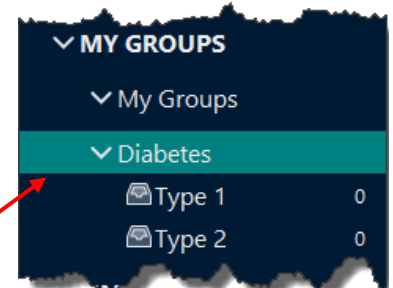
5. Cite While You Write (CWYW)

EndNote enables you to locate and insert citations and figures in your document without leaving your word processor. This is achieved using the EndNote CWYW feature within Microsoft Word. CWYW also works with other word processors, see further details at: https://endnote.com/product-details/compatibility

5.1 Inserting citations into your document

Important: Before inserting citations, make sure that you have a backup copy of your original document/manuscript.

5.1.1 Using the Insert Citation command in Word

- Move the cursor to the required position for the citation in your document.

- From the EndNote ribbon Citations group, expand **Insert Citation** and click on **Insert Citation...**

- A box will appear. To find the required reference, type a term in the box and click on **Find**. To bring up all the references in your library, type **a** into the box and then click on **Find**.
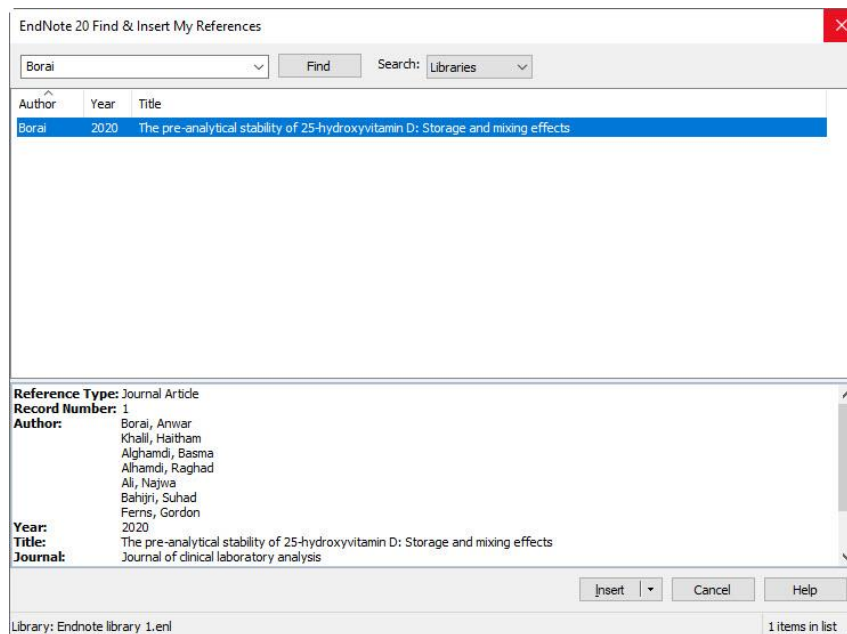

- EndNote will display matching references. Click to highlight the required reference(s).

- Click **Insert** to insert the reference(s) in the text. The following options are also available:

  - **Insert & Display as: Author (Year)** – this will display the author's name outside the parentheses

  - **Insert & Exclude Author** – the author will not appear if you are using an Author-Date output style

  - **Insert & Exclude Year** – the year will not appear if you are using an Author-Date output style

  - **Insert in Bibliography Only** – a citation will not appear within the text, but the reference will appear in the bibliography

5.1.2 Inserting citations from EndNote

- In MS Word move the cursor to the required position for the citation in your document.

- Go to your EndNote library and click to highlight the required reference.

- From the EndNote toolbar on the right click on the **Insert Citation** icon.

If you are not sure that the cursor is in the correct position for the citation in your document do the following:
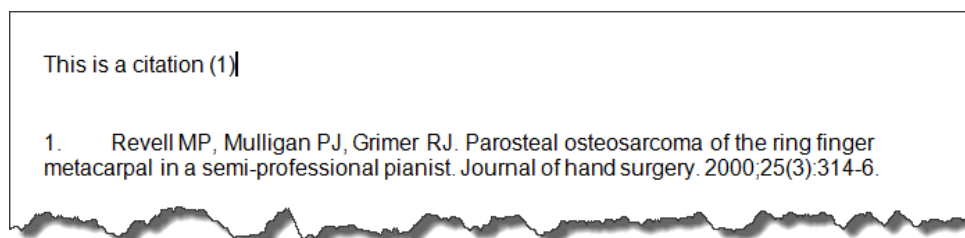
- Ensure the required reference is still highlighted, and then return to your document in MS Word.

- Move the cursor to the required position for the citation in your document.

- From the EndNote ribbon Citations group, expand **Insert Citation** and click on **Insert Selected Citation(s)**.
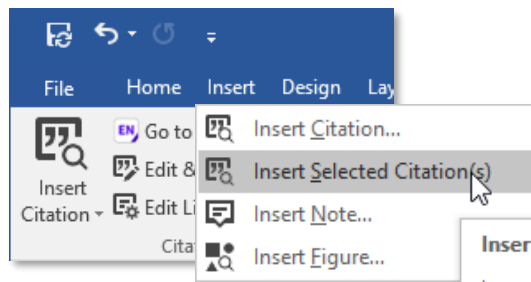

5.2 Formatting a bibliography

How your newly inserted citations appear in your document depends on whether **Instant Formatting** is turned on or off.

By default Instant formatting is turned on. If Instant Formatting is turned **on** the citation will appear formatted using the current output style selected in EndNote, and the full reference will appear below:

This is a citation (1)

1.   Revell MP, Mulligan PJ, Grimer RJ. Parosteal osteosarcoma of the ring finger metacarpal in a semi-professional pianist. Journal of hand surgery. 2000;25(3):314-6.

It is useful to have **Instant Formatting** turned on if you want to see your citations formatted every time you add a new one. However, it can cause problems in Word if you have a large number of citations in your document so you may wish to turn it off temporarily.

To do this, from the EndNote ribbon in Word, click on the **Instant Formatting is On/Off** button to turn it on/off.
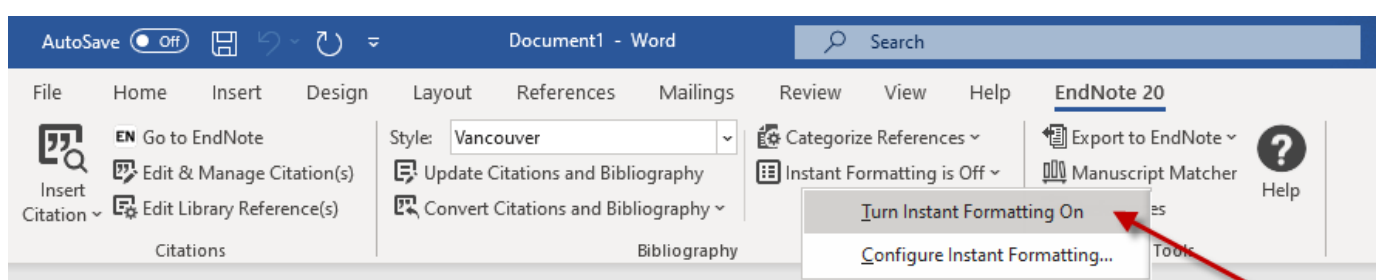
When Instant Formatting is turned **off** the citation will appear unformatted:

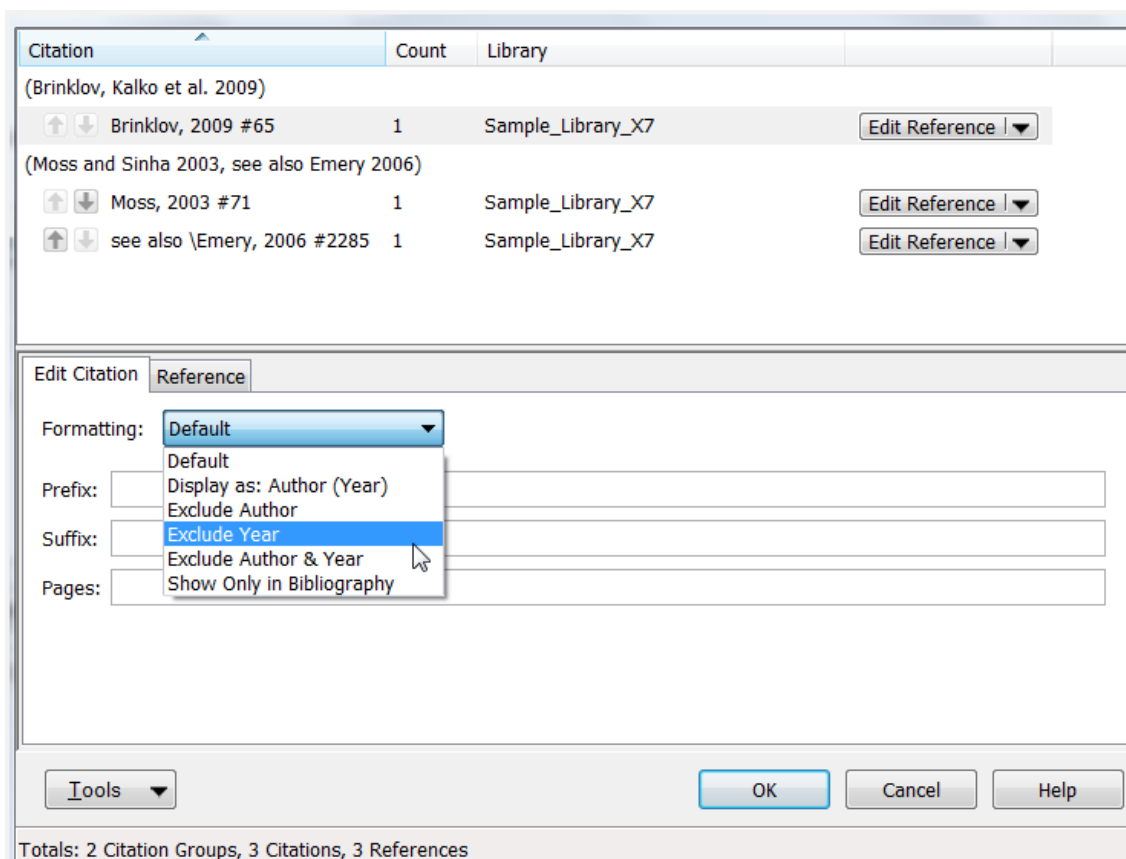This is a citation {Revell, 2000 #20}

5.3 Editing and managing citations

Use the **Edit & Manage Citation(s)** option (Citations group) to modify the way an individual citation appears in the text:
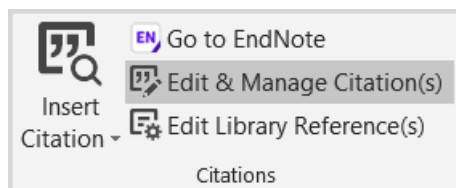
In the following example the year is excluded from the *Brinklov* citation:

In this example a prefix is added to the *Emery* citation.
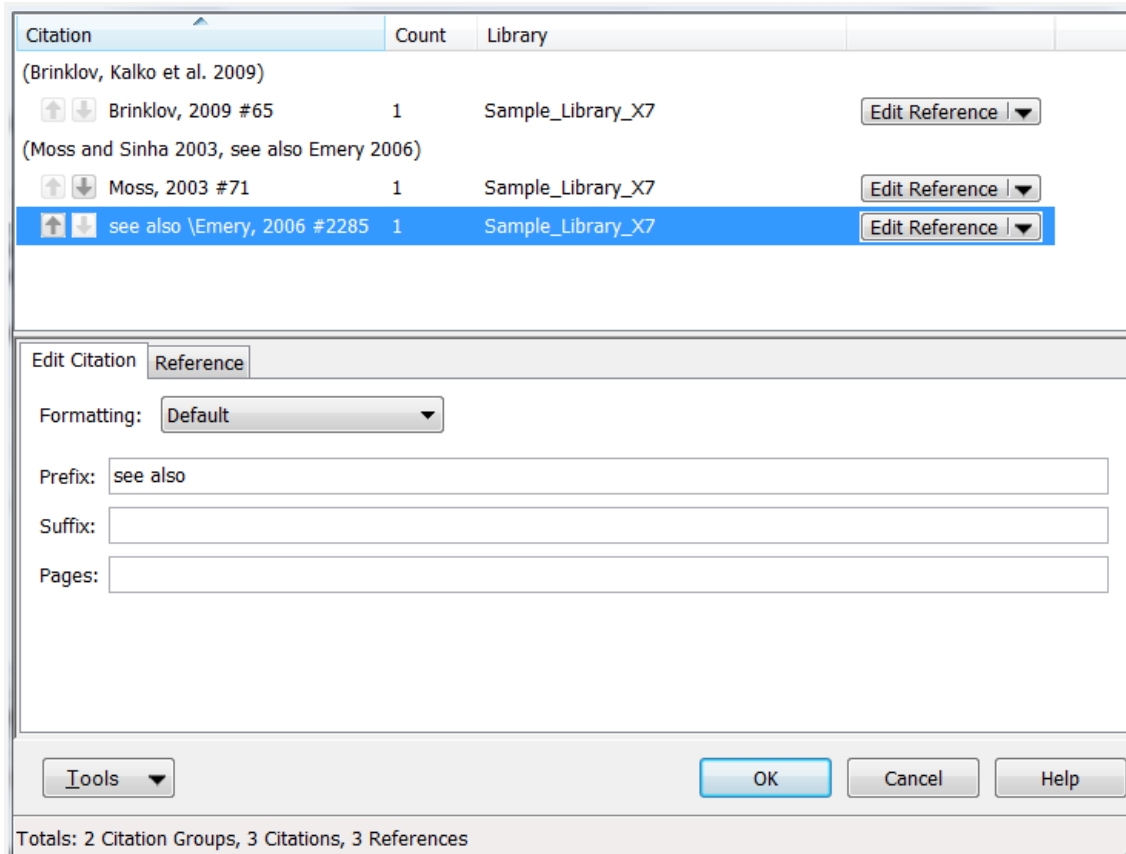
The change only affects the display of the edited in-text citations.

Anything typed in the **Prefix** and **Suffix** boxes will always be displayed in the in-text citation. Use of the **Pages** box is determined by the output style.

Citations can also be inserted and deleted from the **Edit Reference** drop-down menu:

5.4 Inserting figures, charts in your document

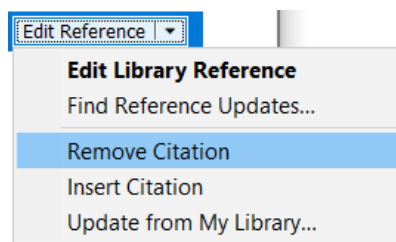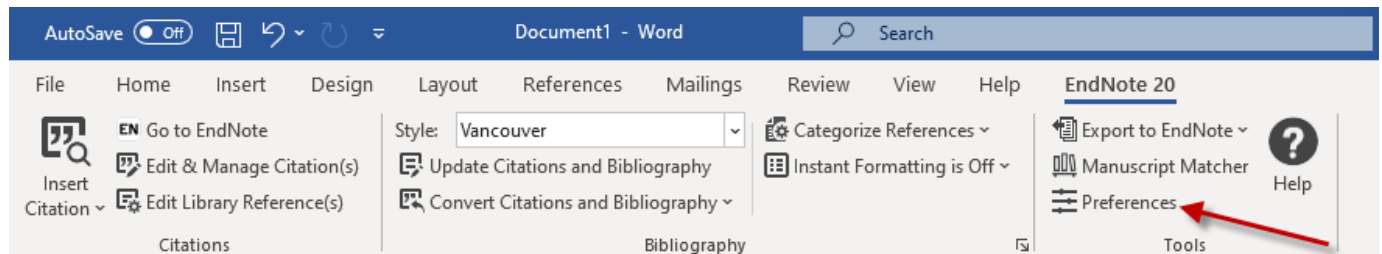As shown in the section on adding references manually, EndNote can be used to store images such as figures, equations, charts or tables. Using CWYW, these images with captions can be inserted into your document.

The positioning of the image and caption is controlled by the output style and by the **Preferences** option in the ribbon (Tools group):

To insert a figure into your document:

- Move the cursor to the point in your document where the figure is to be cited.

- From the EndNote ribbon citations group, expand **Insert Citation** and select **Insert Figure.**

- Use the box and **Find** button to locate the required figure, highlight the one to be inserted, then click the **Insert** button. The image will be inserted and cited in the text.

The positioning of the image and caption is controlled by the output style and by the
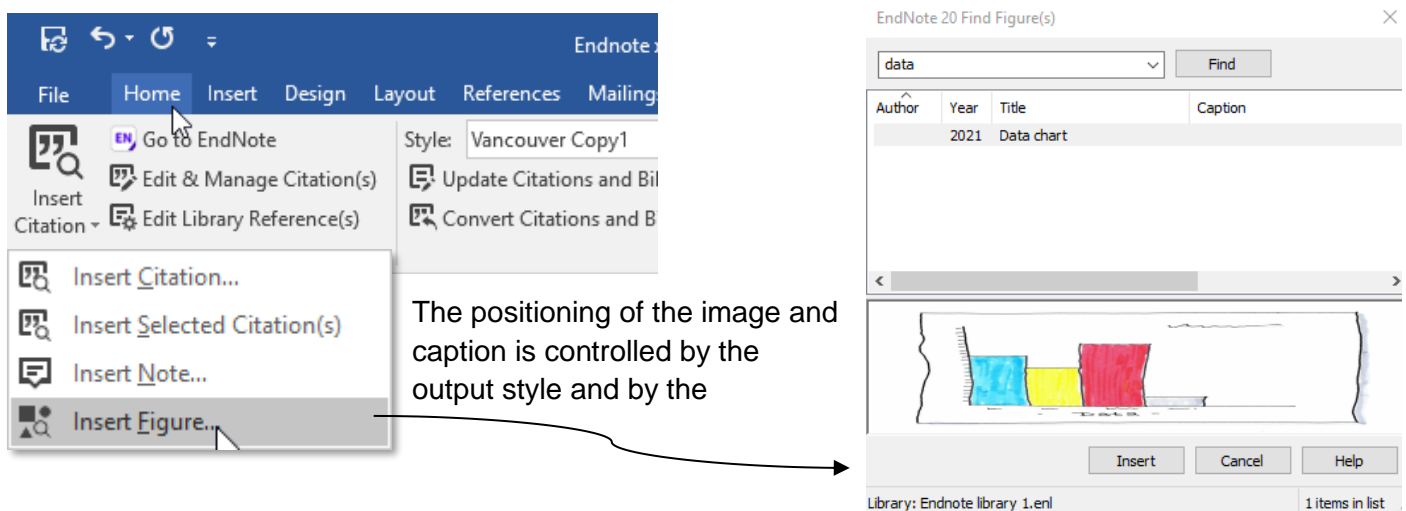
6. Customising Your Citations and Reference Style

6.1 Output styles

EndNote has a range of output styles that controls the appearance of citations in the text and references in your list.

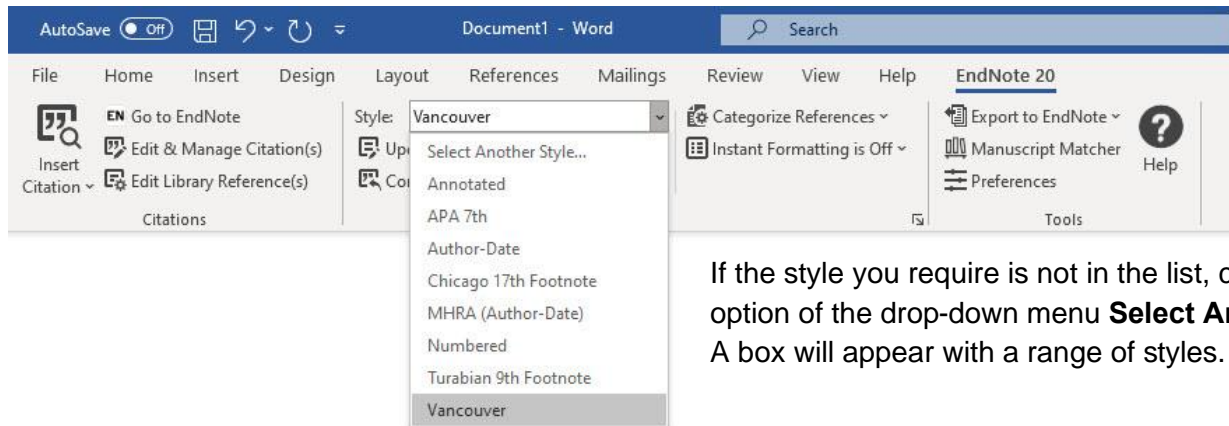To select an output style required for your document simply use the drop-down list in the EndNote ribbon.

If the style you require is not in the list, click on the first option of the drop-down menu **Select Another Style…** A box will appear with a range of styles.

6.2 Customising output styles

Although there are reference styles available that put the information and citation in the correct order and format for that particular style, there may be still elements that you wish to change.

For example if you are importing references from certain databases, they may only provide the abbreviated journal title rather than the full journal title. You may also want to change the appearance of the citation.

To customise a reference style:

- In Endnote go to the **Tools** menu at the top and select **Output Styles**.

- Another menu box will appear, click on **Open Style Manager**

- Highlight the output style you wish to change and click **Edit**
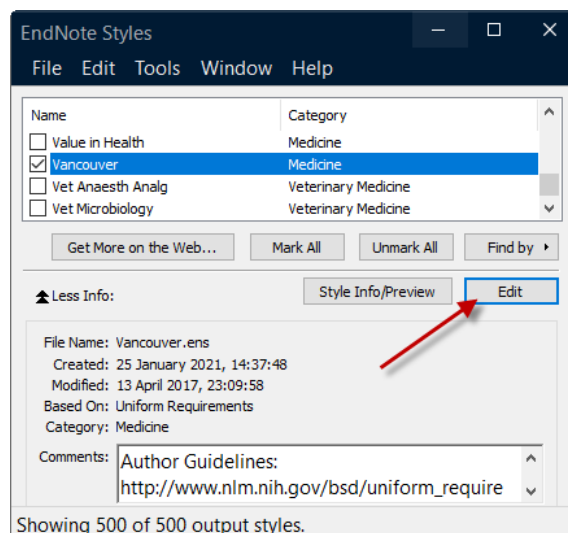
- The following box will appear. To change the various elements of the reference and affiliated citation, click on the options that appear in the left hand menu.
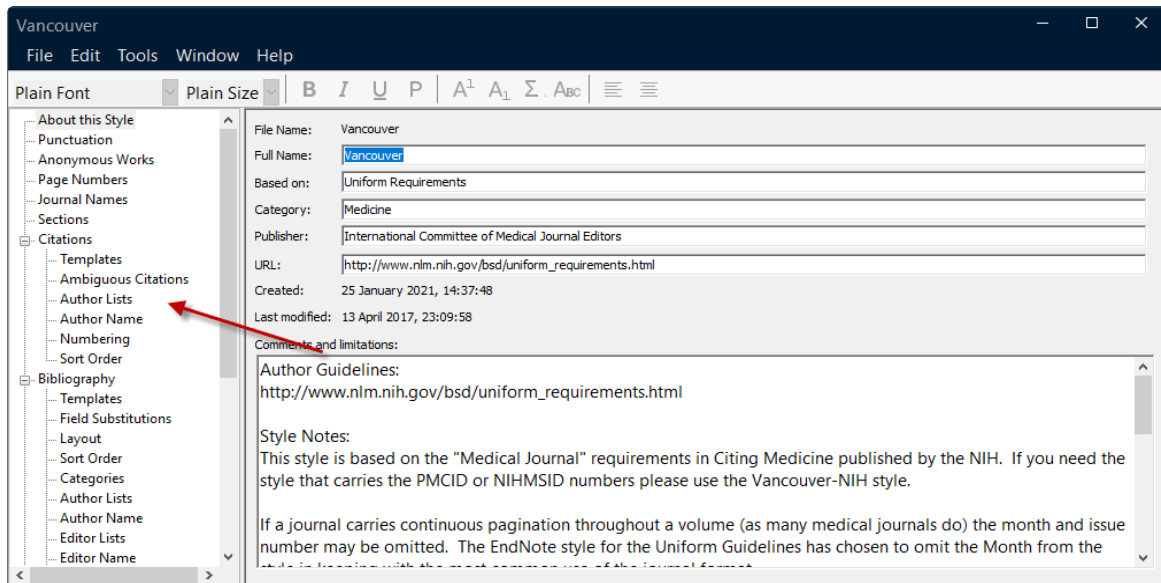
- Once you have made the changes, click on the white **X** button at the top right hand corner of the box. This will prompt you to save your changes as a new output style, which will appear as an option when you next go to choose a reference style in either MS Word or EndNote.

6.2.1 Editing the Citation to appear in superscript

To change the citation settings so it appears above the text:

- Open the Style Manager as shown above and choose to edit your referencing style. Under the **Citations** menu of the left hand side select **Templates**.

- In the main box next to where it says **Citation**, highlight/select the text, and then click on the Superscript button above, see picture below.

- Once you have made the changes, click on the white **X** button at the top right hand corner of the box and save this as a new output style.
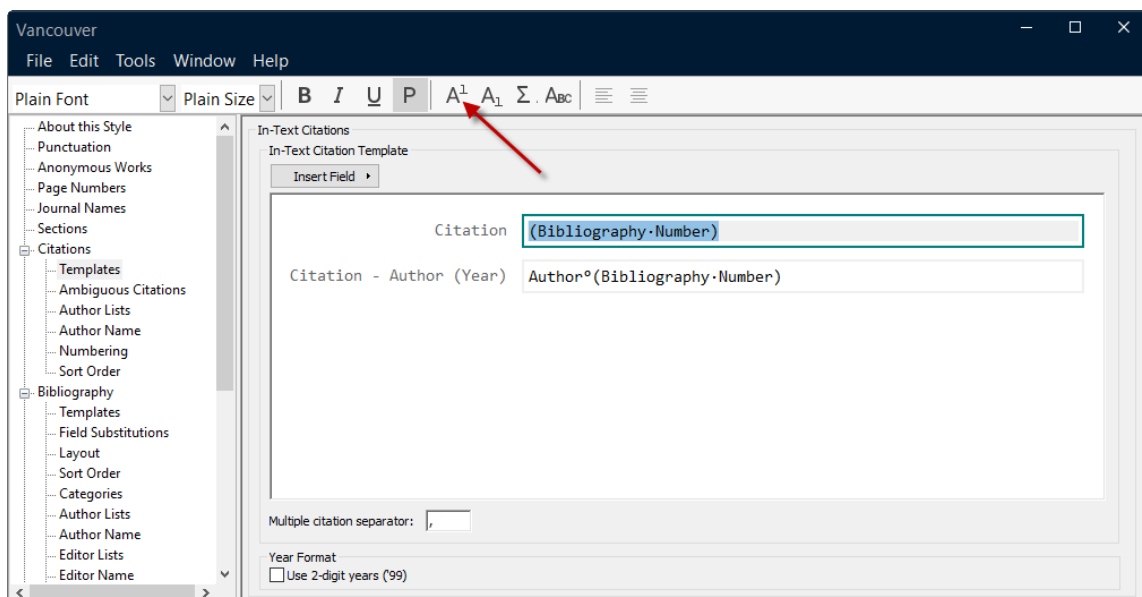
6.2.2 Changing the Format of the Journal Title

When importing references from databases, some databases will only provide the abbreviated journal title and not the full title that is required by some referencing styles. So the reference in its original form may not provide the right journal title format when you insert it into you written work.

As mentioned previously in Importing Term Lists, to combat this problem and save on editing, EndNote has a feature known as **Terms Lists** or more specifically **Journal Term Lists**. The Journals Term List stores various forms of journal names that can be used when creating bibliographies. When you are editing an output style, you can choose the journal title format you require regardless of how it was displayed in the original reference.

To do this:

- Open the Style Manager and choose to edit your referencing style.

- In the menu on the left hand side under **About this Style**, select **Journal Names**.

- In the main box, select which journal format you wish to use, click on the white X button at the top right hand corner of the box and save this as a new output style.
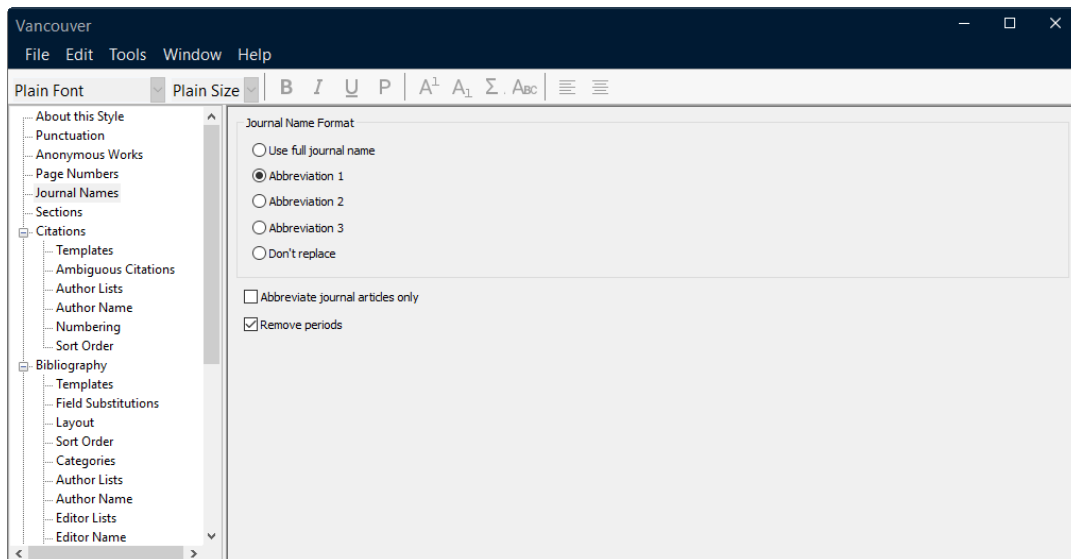
- To see what the various abbreviated formats are of that journal title, you can go to the Journal term list by going to **Library** in the menu, select **Open Term Lists**, Then **Journals Term list**. Then scroll down to find the relevant journal.
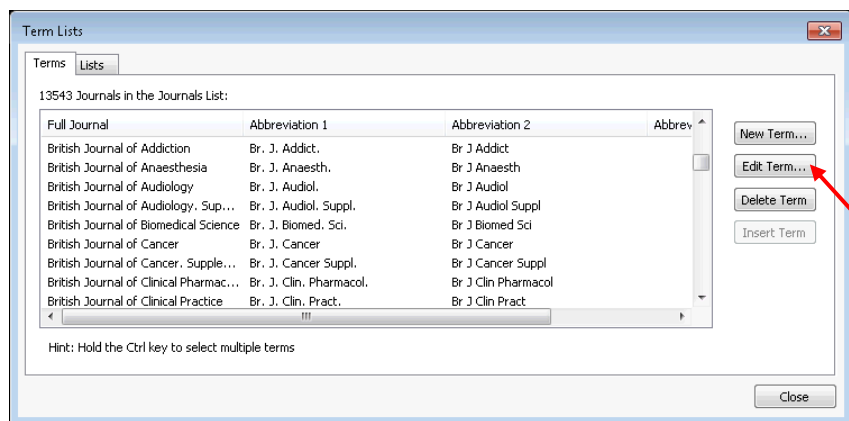
Journals titles can be edited further by selecting **Edit Term..** or titles can be added by selecting **New Term..**

7. EndNote Online for using multiple devices and sharing

7.1 Syncing EndNote Online with EndNote Desktop

Users of EndNote Desktop can create an [EndNote Online](#) account and link the two. Content is then synchronised across both versions e.g. materials added via EndNote Online will appear in EndNote and vice versa. This maximises portability of your EndNote library.

To create an EndNote Online account:

- Click on **Sync** in your EndNote Desktop under the **Library** menu

- In the pop-up box either enter the details of your existing account or, under create new EndNote account, click on sign up and follow the next steps

For more information see the Library's webpage on [EndNote Online](#).

7.2 Sharing your library with others

You can share your library with anyone who has EndNote X7.2 or above, no matter where they are located. EndNote library sharing is for up to 100 people, but this is not restricted to people within Imperial College London. You and any others with whom you want to share your library must all have an EndNote online account. Before you can share a library, you must ensure it is fully synced with your EndNote online library.

You can only share one library. The library that you share will also be the library that you can access online at my.endnote.com or on your iPad using the EndNote for iPad app. There is no limit to the number of libraries that can be shared with you by others.

If you are the person who shared the library, you have access to this library on your desktop, online, or on your iPad. If you have been invited to access someone else's library, you can do that using EndNote desktop.

To set up sharing of your library:

- Click on the **File** menu then select **Share**. You may need to log in with your EndNote Online credentials.

- Enter the email addresses of the people who you would like to share your library with. You can choose whether to give them **Read & Write** access or **Read Only** access. Click **Invite.**

- Those you have invited to share your library will receive an email invitation and will need to log in to their own EndNote Online accounts to begin sharing. Once invites have been sent, you can monitor their acceptance by revisiting the share settings under the **File** menu and **Share.**

- You can remove invites or send email reminders for invites from this screen by clicking on the cog for the relevant person.

To access a library shared by someone else:

- You should receive an email inviting you to access the shared library.

- You will be taken to a website and asked to sign into your EndNote Online account.

- Sync your library, if necessary.

- Open the shared library in EndNote Desktop by going to the **File** menu and selecting **Open shared library**. You can then select which shared EndNote library you want to open.

Once a library has been successfully shared, everyone one will be able to see an 'activity feed'. All members of the group can monitor changes which any other group member makes to the library e.g. addition of new references to the library or annotations to PDFs stored in the library.

- Click on Sync status just above your All references group.

- Click on the drop-down arrow next to the bell (notification) icon (if viewing on a desktop this is found at the far right corner). The activities are shown in this feed, with the most recent appearing first.

To share individual Groups with other EndNote users

The process is similar to sharing libraries:

- Select the Group you wish to share.

- Go to the **Groups** menu, then select **Share Group**.

- Alternatively, with a Group selected, right-click and select **Share Group**.

Note: if only sharing a Group, the people you share your Group with will not see file attachments.

8. Known EndNote Issues

Mendeley and EndNote conflict

The EndNote and Mendeley plugins in Word do not work well together, so you might experience problems if you have both installed. The most common error message seen is 'Cannot edit range' when trying to insert a citation from EndNote into a Word document.

To stop this happening, you have to disable the Mendeley plugin by following these steps:

- Open the File menu in Word.

- Select Options then Add-Ins.

- From the Manage list at the foot of the window select Word Add-ins and click Go.

- Unselect the Mendeley add-in.

You will need to do this every time you open a document in Word. Alternatively remove Mendeley.
Issues syncing your library

If your working library has changed location, e.g. if your old computer had to be replaced, or you had to move your library from Documents to Downloads to avoid issues with the OneDrive sync, the original EndNote sync settings will no longer work because the file path has changed.

You'll need to reset this EndNote sync. The time it takes for the new sync will depend on the size of your library. If you have a large library, it could take a while.

Working in EndNote on your computer hard drive

- Open your working library in its new location on your computer.

- Empty the Trash group. You don't want to waste time syncing records you don't want.

- Make a compressed back-up copy if you haven't done so already.

- Open the Edit menu and select Preferences.

- Go to Sync in the left-hand menu.

- Untick the Sync Automatically box.

- Click Apply then OK.

- Close EndNote.

CWYW plug-in not showing

If CWYW plug-in doesn't show, you can follow these steps:

- In Word, go to **File – Options - Add-ins**

- In the Manage box select **COM add ins** and click **Go**

- Make sure EndNote Cite While You Write is selected

- If this doesn't work, you may need to manually add CWYW plug-in:

https://support.clarivate.com/Endnote/s/article/EndNote-X1X2X3X4X5X6X7X8X9-Windows-Install-Word-CWYW-Toolbar?language=en_US

EndNote Click

If you have EndNote Click installed in your browser but it does not pop up, you may have to clear the cache in your browser or deactivate the pop-up blockers on your browser.

Appendix A: Configuring Full Text and OpenURL Settings

EndNote can automatically locate and download full text files by accessing several sources, including: DOI (Digital Object Identifier), PubMed LinkOut, and ISI Web of Science Full Text Links. EndNote will try to use all of these methods to optimise the likelihood of finding full text files associated with your bibliographic records.

Since some sources accessed may require authentication, you are likely to get better results using Find Full Text when connected to the Imperial College network.

To optimise retrieval of Full Text articles:

- Go to **Edit > Preferences** and select **Find Full Text.**

- Ensure that all the search option boxes are ticked.

- In the OpenURL Path box enter:

    - **https://library-search.imperial.ac.uk/openurl/44IMP_INST/44IMP_INST:ICL_VU1?**

- In the Authenticate with URL box enter

    - **http://iclibezp1.cc.ic.ac.uk/login?url=http://iclibezp1.cc.ic.ac.uk/login?url=https://library-search.imperial.ac.uk/openurl/44IMP_INST/44IMP_INST:ICL_VU1?**
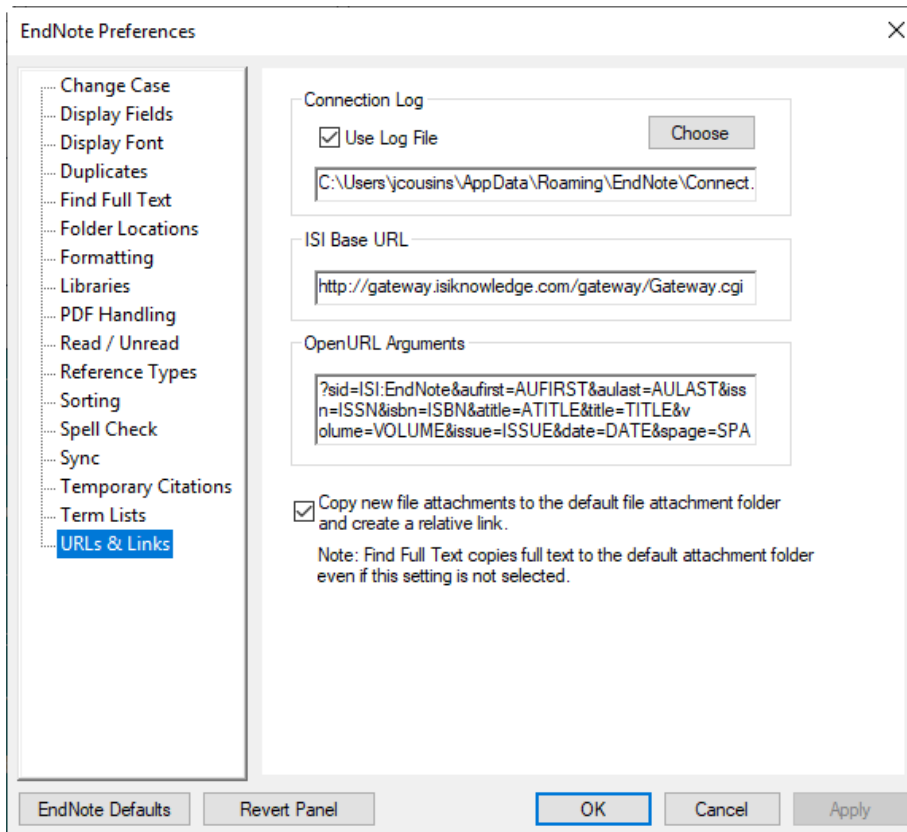
- Click **OK**.
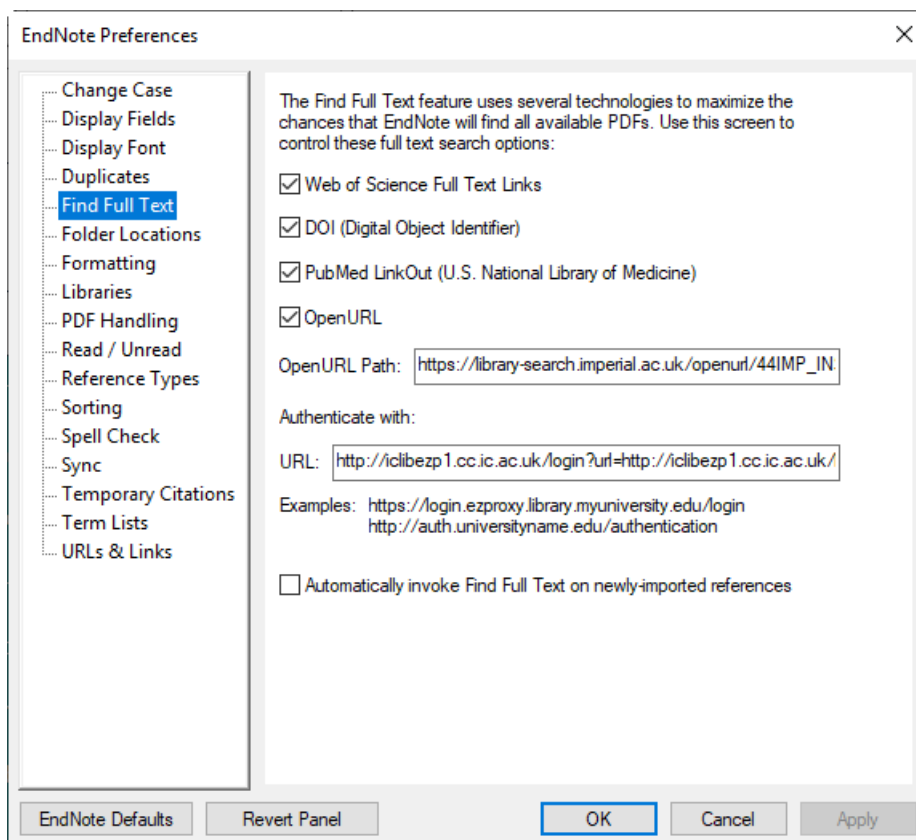
OpenURL Link

The OpenURL Link command can be found in References menu as follows: **References > URL** and select **OpenURL Link**. This command opens your default web browser and displays related record links for references you have selected in your Endnote Library. It connects to an OpenURL standard syntax server and uses these OpenURL preferences along with data in your EndNote record to find related online references and full-text sources if available.

To connect to the Library OpenURL server:

- Go to **Edit > Preferences** and select **URLs & Links.**

- In OpenURL Arguments box change the sid to ISI:EndNote. The new arguments should look like this:

> ?sid=ISI:EndNote&aufirst=AUFIRST&aulast=AULAST&issn=ISSN&isbn=ISBN&atitle=A TITLE&title=TITLE&v olume=VOLUME&issue=ISSUE&date=DATE&spage=SPA

- Click OK

Finding Full-text articles

Select the references you want to find and click on the Find Full Text icon:

This will take you through to the Find Full Text login page, sign in with your Imperial College credentials if prompted:

Find Full Text Login

What is authentication? ❓

Imperial College
London

Please enter your College username: |
Please enter your College password: |
Login

There has recently been a spate of phishing attacks made to look like this journal access service. Be very careful when entering your password into links sent via unsolicited email.

Continue Cancel

The next page will be a list of the databases, here just click continue:

Find Full Text Login

What is authentication? ❓

Imperial College
London

This page is the default menu of databases. It is typically used for testing, but not for deployment. See www.oclc.org/us/en/support/documentation/ezproxy/cfg/database.htm for more information.

Database Menu

Academic Tax Library
eIFRS (Business School Owned Resource)
Cochrane Library (updated 20190730)
Economist.com
Embo Press Journals
IAEA INIS (International Nuclear Information Systems) database
IHS ESDU
IOS Press (updated 20181109)
Jane's Online Service
Mintel (updated 20190723)

Continue Cancel

Appendix B: Troubleshooting EndNote for Mac users

Issues downloading the latest version of EndNote – EndNote 20

If you have an older version of EndNote installed, e.g. EndNote X9, please uninstall it.

Use the Mac installer from the [ICT Software](#) webpage. Make a note of the installer key as you may be asked to enter this to proceed with installation.

When asked about the institution please input **Imperial College London**

Compatibility issues when using Word in conjunction with EndNote

Common error message: "Word wasn't able to load an add-in, Your add-in isn't compatible with this version of Word. Please contact the add-in provider for an update. (EndNote CWYW Word 16.bundle)"

Brand-new Macs have a new chip which means you will have to run Word in compatibility mode to get EndNote to work within Word.

You should 'Open with Rosetta', as detailed below:

- Quit both EndNote and Word

- Open Finder

- Go to the Applications folder

- Select (highlight) Word (do NOT open it, just select it)

- Go to the File menu at the top of the screen and select "Get Info"

- Under General, check the option for "Open using Rosetta"

- Open EndNote and Microsoft Word and verify that you can now insert a reference from EndNote into Word

Then restart the Mac for safety and EndNote should work with Word.

Appendix C: Creating a Bibliography from Multiple Documents

Sometimes it is more convenient when working on a large text to split it into separate documents, for example, one document for each chapter. You then need to produce one bibliography to include all the chapters.

You can use EndNote's *Format Paper* option or Word's *Master Document* feature to generate a single bibliography from multiple documents. This allows you to create a cumulative bibliography from any number of chapters. (For details of Word's Master Document feature consult the Help available in Word.)

To generate a single bibliography using EndNote's Format Paper option:

- In each of your documents, or chapters, insert your citations to link them to references in an EndNote library. If you use the Cite While You Write feature, make sure you click on the **Convert to Unformatted Citations** (Convert citations and bibliography) option. The citations should look like this:

  > Where the other species {Schwartz, 1990 #11} arose is a mystery.

- Save each document in Rich Text Format (RTF). Close each document.

- In EndNote, click on **Tools**, then **Format Paper**, then **Format Paper**.

- When prompted, locate the first RTF document to be scanned. The following screen is then displayed:
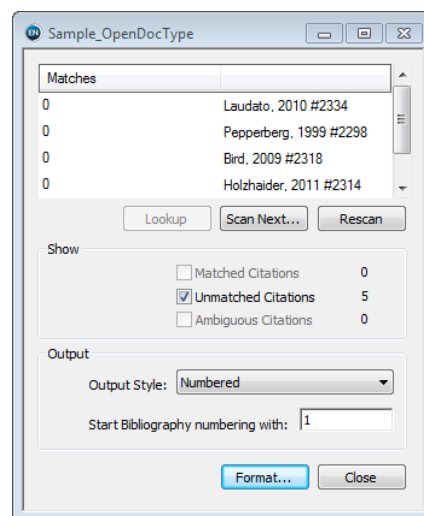
- Click on **Scan Next** and locate the next RTF document to be scanned. Repeat until all documents have been scanned

- Select the **Output Style** you require then click on **Format**.

- You will be prompted to save each document with a new name. Each document will contain formatted citations but only the last document scanned will contain the formatted bibliography at the end.

Appendix D: Using EndNote with LaTeX/BibTeX

LaTeX is an open-source typesetting program that enables the creation of high-quality documents. LaTeX is favoured by scientists/engineers requiring extensive use of mathematical symbols/formulae. BibTeX is a bibliographic tool that can be used with LaTeX to manage references and create a reference list.

It is not possible to use EndNote's Cite While You Write functionality with LaTeX/BibTeX. However, it is possible to use the reference management features of EndNote to store and organise references. Selected reference details can then be exported as BibTeX files (.bib) for use with LaTeX as required.

To export a BibTeX file (.bib), follow these steps:

- From the **File** menu, choose **Export**.

- Select the desired drive and folder.

- Choose a file name with no spaces and add the (**.bib**) extension to the end. For example: references1.bib

- Choose the Text File format as the **file type** for the exported file.

- From the "Output style" list select "**BibTeX Export**". You may need to find the style under "Select Another Style".

- Click **Save**.

More information about using EndNote with LaTeX/BibTeX is available at our website:

http://www.imperial.ac.uk/library/learning-support/reference-management/endnote/