Introduction to EndNote20 Desktop

EndNote20 helps you to store, manage and search for bibliographic references in a personal database. You can attach full-text PDF articles to references.

You can also take advantage of EndNote's "Cite While You Write" facility to insert citations (references) in a Word document and generate a list of references at the end of the document in a wide variety of styles.

Table of Contents

1. Downloading EndNote 20 Software

1.1 Downloading EndNote 20 for home

Under the terms of our licence LJMU students and academic staff may download EndNote from https://www.ljmu.ac.uk/ithelp/software-for-staff-and-students and install it on their own PC or Mac to run alongside Word. This includes the desktop version of Word available via Microsoft Office 365.

You must uninstall EndNote when you leave LJMU.

1.2 Downloading EndNote 20 (Windows) on Staff PC

Staff can request the installation of EndNote 20 desktop on an LJMU devices via the Software Centre: https://helpme.ljmu.ac.uk/#servicecatalogue and search "software" and submit a request.

Once installed you will see in Word an **EndNote 20** tab appears on the ribbon, to access EndNote select **Go to EndNote** in the EndNote ribbon.

1.3 Creating and opening an EndNote Library

EndNote stores references in files referred to as libraries.

Please note: EndNote is not compatible with cloud base storage, for example, OneDrive, Google Docs, M: drive, etc. Therefore, we recommend you save your EndNote library on the hard drive of your device.

To create a new library, select **File** and then **New** and **Create a new library**:
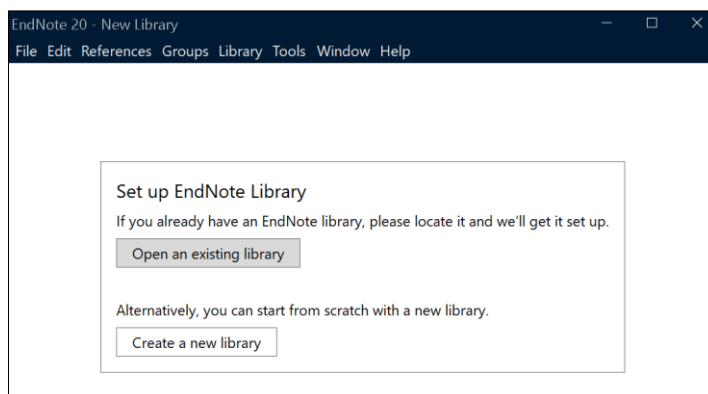
Enter a filename if you do not wish to give your library the default name 'My EndNote Library' and then select **Save**.

In addition to the above library file EndNote will create an accompanying folder, for example: My EndNote Library.data.

To open an existing EndNote library, start EndNote, then select **File** and then **Open Library** and select the appropriate library.

Only create **one EndNote library**, if you are collecting references on a range of topics for different assignments/projects or documents, you can easily assign references within a library to one or more groups to make things easier to manage.

Only work with **one Word document** open at once.

2. EndNote Library Screen

EndNote defaults to the **All References** panel:

Across the top of the three sections is an EndNote toolbar, selecting each option will reveal a submenu:
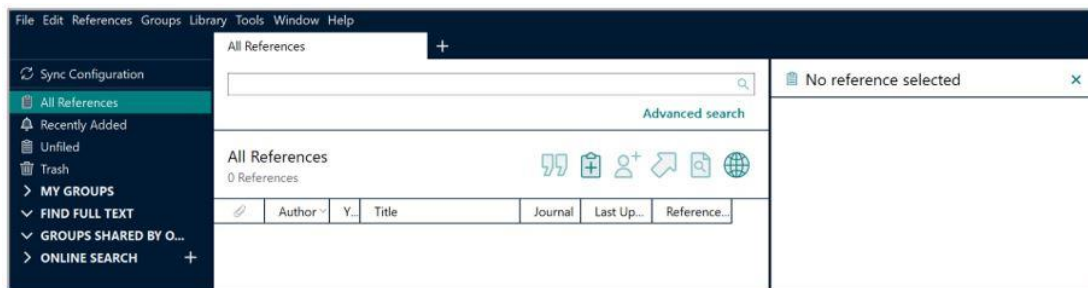

- **File**: to open, save, share, compress a library and more
- **Edit**: for preferences, fonts and more
- **References**: to add a new reference, find full text, attach files and more
- **Groups**: create, delete and add references to a group and more
- **Library:** sync, find duplicates, move fields and more
- **Tools**: styles, filters, CWYW and more
- **Window**: display
- **Help**: updates and guidance

The left-side menu has a number of default folders/options which cannot be removed. The Library defaults to:

- **Sync Configeration:** to sync with an EndNote Online Account
- **All References:** this is the default screen and where all your references will appear
- **Recently Added:** this shows references added when you have your library open
- **Unfiled**: these are references that have not been moved to a Group (folder)
- **Trash**: records that you have deleted
- **My Groups**: to store/manage references into folders
- **Find Full Text:** to search for PDFs
- **Groups Shared by Others:** folder of references shared with a colleague
- **Online Search:** connection files to search some databases via EndNote

3. Adding References

EndNote defaults to the **All References** panel where all your references will be stored:
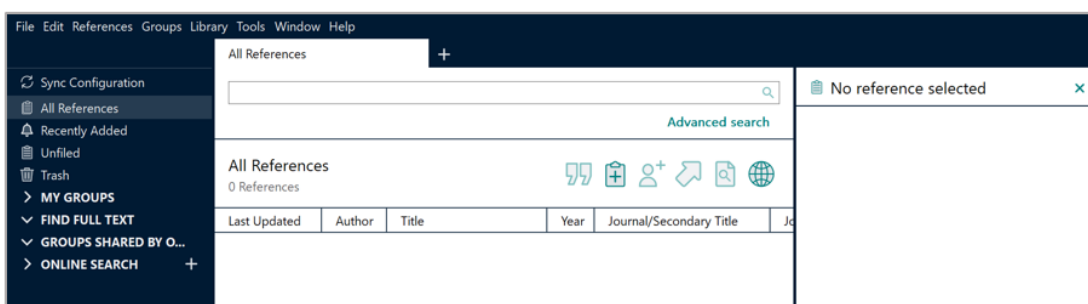
There are several ways to add references to an EndNote library:

- Adding references manually
- Exporting references direct from Discover and individual databases
- Adding references from an Online Search within Endnote
- Exporting from a Google Scholar search
- Creating EndNote records from a collection of PDF articles

The **All References** panel has some default headings/fields, you can change the order of these headings, remove headings or add more.

To make any changes select **Edit** on the toolbar, then **Preferences**, from the box select **Display Fields**. You can also switch any heading on/off by right clicking any of the headings and selecting the ones you wish to display.

References can be sorted by author, year, etc. You can change the display order by selecting a heading:

3.1 Manually Adding References

Select **References** from the toolbar, then **New Reference** or select the **Add New Reference** icon
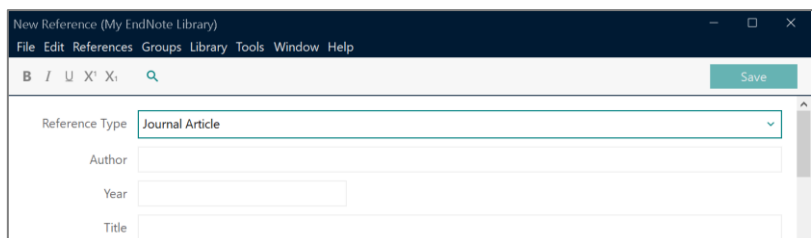
A **New Reference** template will open, defaulting to Journal Article. Select the dropdown menu to choose a **Reference Type**. If you change the reference type, select the **Author** field of the selected template before you start typing details.

Press the **Tab** key or select the next field to move through the reference.

Please Note: Choose **Electronic Article** not Journal Article, if you wish the URL and accessed date to appear in a reference in your Word document. Choose **Book section** to reference to a chapter in an edited book.

Author names:

- Enter either as first middle last: John Edward Smith or last, first middle: Smith, John Edward
- If you enter last name first include a **comma** between the author's last name and initials or last name and first names. EndNote will reduce first names to initials, if the style you have chosen for your reference list requires it.
- As you type, EndNote will suggest names already in your library that are similar to the one you are entering. To accept a suggestion, press the **Tab** key.

- If you are entering a new name, keep typing until you have completed the name and then press **Enter**. New authors' names appear in red until the reference is saved.
- If an item has more than one author, press **Enter** when you have entered the first name and enter the second name on a second line in the author field. Do not put "and" between the names:

Author	S Chandrasekar
	S Manhendra Dev
	Vijay Laxmi Pandey

- Organisations/Societies/Government Departments, add a **comma** after the name of the organisation, for example: Department of Health, this will ensure that it is displayed correctly:

Author	Department of Health,

Punctuation: enter all details in **plain text**, for example: no brackets, extra punctuation, bold, italics or underlining. EndNote will automatically add the punctuation where necessary when it generates a reference in the style you have selected.

Spaces: avoid gaps within a reference, do not include any unnecessary spaces or these gaps will appear in the reference.

Electronic articles and eBooks (using Harvard LJMU style): complete the **Date Accessed** field and the **DOI** or the **URL** field if you want the web details to appear in the full reference.

Webpages/Reports (using Harvard LJMU style): complete the **Date Accessed** field and **URL** field to display the web details in the reference.

Save: Select **Save** and then close the reference window when you have entered all the relevant details.

Please Note: To insert accented or other non-standard characters in a reference, use the Windows Character Map program. This is available via **Start**, Windows Accessories, System Tools, Character Map. Select the character you need, copy and paste it into the relevant location in the reference.

3.2 Exporting References

Discover and many individual databases offer a "Direct Export" option. This allows you to search within the database, select references and then export them to your EndNote library in a matter of seconds.

Exporting involves selecting the references in your search results by selecting the title(s) or adding them to your folder, then selecting an export option and a format: **EndNote** or **RIS**.

If your EndNote library is open, you will then be prompted to add the exported references to your EndNote library. If EndNote is not open, it will open and then the references will be added. If an Open or Save option appears after you selected to export using the direct export references option from a database, select **Open** to complete the process.

Please Note: If you wish to use this facility when running EndNote from home, you may need to launch EndNote before attempting to export references from a database.

3.2.1 Discover: Exporting References

To export an individual search result from Discover, select the **Title** to open the item record. A range of options will appear underneath **Send To**:
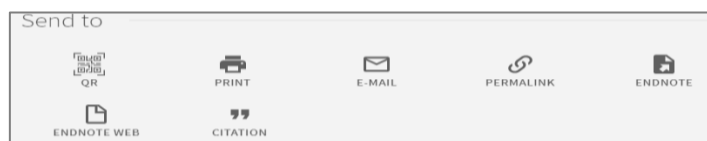
- Select **EndNote** and select **Download**
- The next step differs depending on the web browser you are using:

    Chrome: a RIS export folder will appear at the bottom of the screen, select the up arrow to open the File Menu and choose **Open**

    Microsoft Edge: a RIS Download folder will appear in the top right-hand corner of the screen, select **Open file**

    Internet Explorer: a toolbar will appear at the bottom of the screen, select **Save** and when prompted, choose **Open**

- This will open your EndNote Library and the reference will be imported from Discover

Once the reference is imported, you will see an **Imported References** folder appear in the left-side menu and a confirmation message in the window:

The full reference is also in the **Unfiled** and **All References** folders where it appears greyed out until you import more references or close your library.

To export multiple references, select the Push Pin icon next to each of references you wish to export to add them to your **My Favorites** list

- Select Push Pin at the top of the screen to open your **My Favorites** list
- Select the checkboxes next to the references you would like to export:

- Select the **3 dots**, select **EndNote** then select **Download**

Once the references are imported, you will see an **Imported References** folder in the left-side menu and a confirmation message in the window:

The full references are also in the **Unfiled** and **All References** folders and they will appear greyed out until you import more references or close your library.

Please Note: The titles in some references you export may be all in capitals. To correct this once you have the reference in your library you can edit the contents of the title field.

3.2.2 Databases: Exporting References

Exporting from databases involves selecting the references in your search results by either ticking boxes or adding them to a folder and then exporting the selected references or the references in the folder. There are different export options depending on the database, for example: Download citations, Export Citations or Export
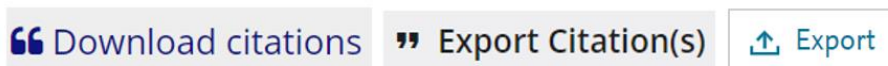
When you select the export option, you may need to select a level of detail for each reference (typically citation only or citation and abstract) and then look for the **EndNote** or **RIS format** option:
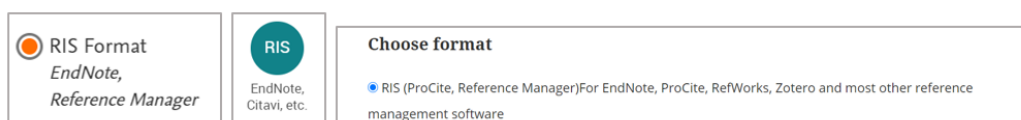
The next step differs depending on the web browser you are using:

> **Chrome:** an export folder will appear at the bottom of the screen, select the up arrow to open the File Menu and choose **Open**

> **Microsoft Edge:** a Download folder will appear in the top right-hand corner of the screen, select **Open file**

> **Internet Explorer:** a toolbar will appear at the bottom of the screen, select **Save** and when prompted, choose **Open**

Once the references are imported, you will see the **Imported References** folder
 in the left-side menu and a confirmation message in the window:


The full references are also in the **Unfiled** and **All References** folders and they will appear greyed out until you import more references or close your library.

Please Note: It is possible to import references from different databases into a single EndNote library, but the references must be imported through the appropriate filter.

3.2.3 Google Scholar: Exporting References

In Google Scholar:

- Select **Settings** in the **menu bar** , scroll down to the **Bibliography manager** options.
- Select **Show links to import citations into** and change the drop-down option to **EndNote**
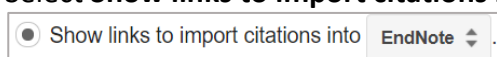
- **Save**

Each record in the search results will have a **Cite** icon ⁵⁵ select this. At the bottom of the **Cite** box select **EndNote**. This will create a **scholar.enw** file.

The next step differs depending on the web browser you are using:

> **Chrome:** an export folder will appear at the bottom of the screen, select the **^** arrow to open the File Menu and choose **Open**

> **Microsoft Edge:** a Downloads folder will appear in the top right-hand corner of the screen, select **Open file**

> **Internet Explorer:** a toolbar will appear at the bottom of the screen, select **Save** and when prompted, choose **Open**

Once the reference is imported, you will see an **Imported References** folder

🔷 Imported References 1 appear in the left-side menu and a confirmation message in the window:

Imported References	
1 Reference	⁵⁵ 🔲 ⊹ ⤢ 🔍 🌐

The full reference is also in the **Unfiled** and **All References** folders where it appears greyed out until you import more references or close your library.

3.2.4 Online Search in EndNote

EndNote has several database and catalogue **Connection Files**, which allow you can perform searches, for example: PubMed and Discover, the library search system, adding references directly into your EndNote library.

Access is via **ONLINE SEARCH** [✓ ONLINE SEARCH] in the left-side menu, with more options under the **Plus** button. LJMU has subscription for many of the databases listed but please note that some of these Connection Files for the American versions and are not compatible with those available in the UK.

Please Note: We recommend you perform the search directly in Discover or the individual database.

If you do perform an online search directly from EndNote, then the following are the instructions for some of the key searches:

Discover Search:

- Select the Plus button under the **ONLINE SEARCH** heading
- Scroll down the list and select **Liverpool JMU Discover** from the list of connection files and then select **Choose**
- A **Liverpool JMU Discover** search window will open in EndNote
- Select which fields to search or **Any Field** to search all fields and then type your **search term(s)** into the box:

- To refine a search, add another term, limit the search to specific fields, use the Boolean operators. To add another term to a search, select **Cancel** to return to the Search tab

- Select the references you want to add and then select the **Add** button ⊕ to add them to your library

- The references will appear both in the **All References** and **Recently Added** folders

  🔔 Recently Added   2

- The search results are also in a temporary **Liverpool JMU Discover** folder

  🌐 Liverpool JMU Discover   25   but these will disappear when you close your library

Individual Database Search, for example: PubMed:

- Select **PubMed (NLM)** from the list of services under the **ONLINE SEARCH**

- A **PubMed (NLM)** search window will open in EndNote

- Select which fields to search or **Any Field** to search all fields and then type your **search term(s)** into the box:

- To refine a search, add another term, limit the search to specific fields, use the Boolean operators:

- To add another search term, select **Cancel** to return to the Search tab. You can halt the retrieval process at any time just select the **Cancel** button on the **Search** tab.

- Select the references you want to add and then select the **Add** button ⊕ to add them to your library

- The References will appear in both the **All References** and in **Recently Added** folders

  🔔 Recently Added   2

- The search results are also in a temporary **PubMed (NLM)** folder
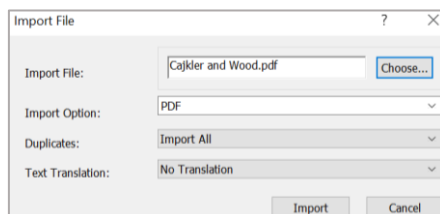
  🌐 PubMed (NLM)   25   which will disappear when you close your library

3.2.5 Creating EndNote records from a collection of saved PDF articles

If you already have a collection of journal articles in PDF files, EndNote may be able to create records for them automatically. This only works with PDFs created recently by publishers who embed bibliographic data (typically a DOI) in the documents.

To export multiple PDFs put them into one folder and open your Endnote library

- Select **File** and select **Import**

- Select **File** for an individual PDF or **Folder** for multiple PDFs

- Select **Choose** to navigate to the file (PDF) or folder, select it and select **open**

- **Import Options:** PDF should already be selected, if not, use the dropdown menu to select **PDF**:

- Select **Import**

- Imported references appear in **Imported References** folder

A copy of any PDFs with embedded DOI data will be imported into new records with matching bibliographic data. You may need to edit the journal title and article title fields so that they match the style that you wish to use.

PDFs without embedded DOI data are added to individual default journal article records and the file name of the PDF will be displayed in the title field of the record. Select the record and in right-side panel select **Summary** then **Edit** and enter details of the items to the records manually.

4. Reviewing your search results

We recommend that each time you have finished searching, before closing your library, you review the references in the **Unfiled** folder .
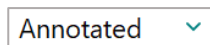
It is essential that you check that all the details needed to create the reference for your reference list are there, so the references are ready for when you want to **Cite While You Write** (see Section 7). Once you have checked them you can add them to your **Groups** (see Section 5), leaving the **Unfiled** folder empty for next time.

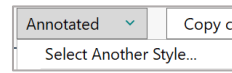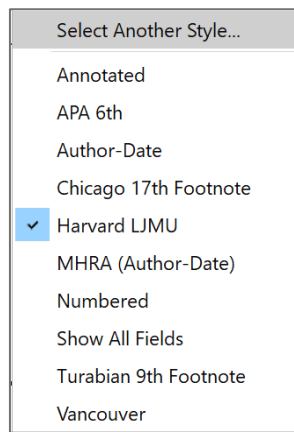### 4.1 Checking the Reference is correct

- Select a **reference**

- Select **Summary** in the right-side panel to see the details
- The default referencing style will be **Annotated**. Select the drop-down menu to change the referencing style and select the dropdown arrow and select your chosen style, for example, Harvard LJMU:

If your style is not listed, select **Select Another Style** **,** find your style, highlight it and select **Choose**

OR

- Select **Tools** and select **Output styles**
- Then select your style from the list. If it is not listed, choose **Open Style Manager** and search for the referencing style you require.
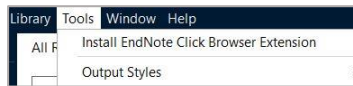
A preview of the reference can be seen in the bottom of the panel, if this does not look correct you will need to amend/update the template (see Section 4.2):
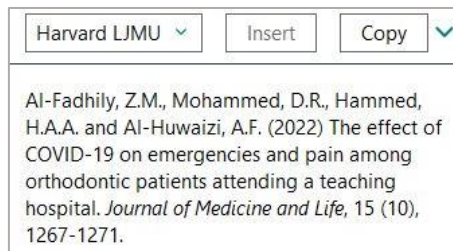

Please Note: Journal titles may be displayed as an abbreviated title so you will need to amend this (see Section 4.2) and enter in the **full title.** To display the URL and access details in a reference you need to change reference type from Journal Article to **Electronic Article**.

Once you have checked each reference move it into a **Group** (see Section 5).

4.2 Editing a Reference in EndNote

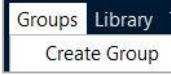- Select the reference in the **All References** panel
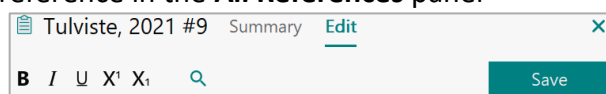
- Select **Edit** in the right-hand side panel
- Select the fields that need amending, make sure you do not leave any spaces and then select **Save**
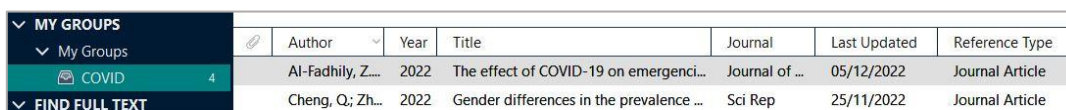- Move the reference to a **Group** (see Section 5)

5. Managing your references into Groups

As your EndNote library grows, it is good practice to organise your references into **Groups.** You can add references one or multiple groups but they will always remain in **All References**.

5.1 Creating a Group and adding references to it

- From the **Groups menu**, select **Create Group** or right click on **MY GROUPS** in the left-side menu and select **Create Group**

- In **MY GROUPS** in the left-side menu, **New Group** is now highlighted, type in a name and press **Enter**

- Select **All References** to display the entire library again

- Highlight the references you wish to add to the new Group

- Drag the highlighted references to the new group or go to **Groups** on the toolbar menu and select **Add References To** and select the Group you want to move the references to

- Select the Group to display the references now included in that Group:

5.2 Deleting a Group

- On the left-side menu, right click on the Group name and select **Delete Group** or select **Groups** on the toolbar menu and then select **Delete Group**
- Select **Yes** to confirm you wish to delete the group

Please Note: Only that Group is deleted, the references it contained are not deleted from your library.

5.3 Renaming a Group

- On the left-side menu, right click on the Group name and select **Rename Group** OR select **Groups** on the toolbar menu and then then select **Rename Group**

Please Note: You cannot change or delete: All References, Duplicate References, Find Full Text, Imported References, Recently Added, Search Results, Trash and Unfiled.

5.4 Removing References from a Group

- To remove a reference, select the **Group** in the left-side menu to display its contents
- Select the reference(s) you wish to delete and then press **Delete**
- Select **Yes** to confirm that you wish to delete the selected reference(s) from the group

5.5 Deleting references from your library

- To delete references from your library completely select the reference(s) in **All References**
- You can then either drag them to the Trash folder or from the toolbar menu select **References** and then select **Move References to Trash**
- To restore records from the Trash to your library, display the Trash group, select the references you wish to restore and drag them over to **All References** or select the **Restore** icon
- To permanently delete the references from your library, display the Trash group, select the references you wish to permanently delete, press **delete** or select the **Delete** icon and then select **Yes** to confirm

Please Note: References deleted from the Trash folder cannot be recovered.

5.6 Duplicates

If you have collected references from several databases, your library may contain some duplicate references. We recommend you check your library for these and delete any that you find.
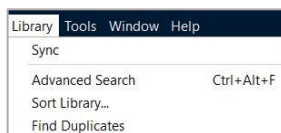
- Select **Library**, then **Find Duplicates**
- The number of duplicate references found are displayed in the **Duplicate References** folder
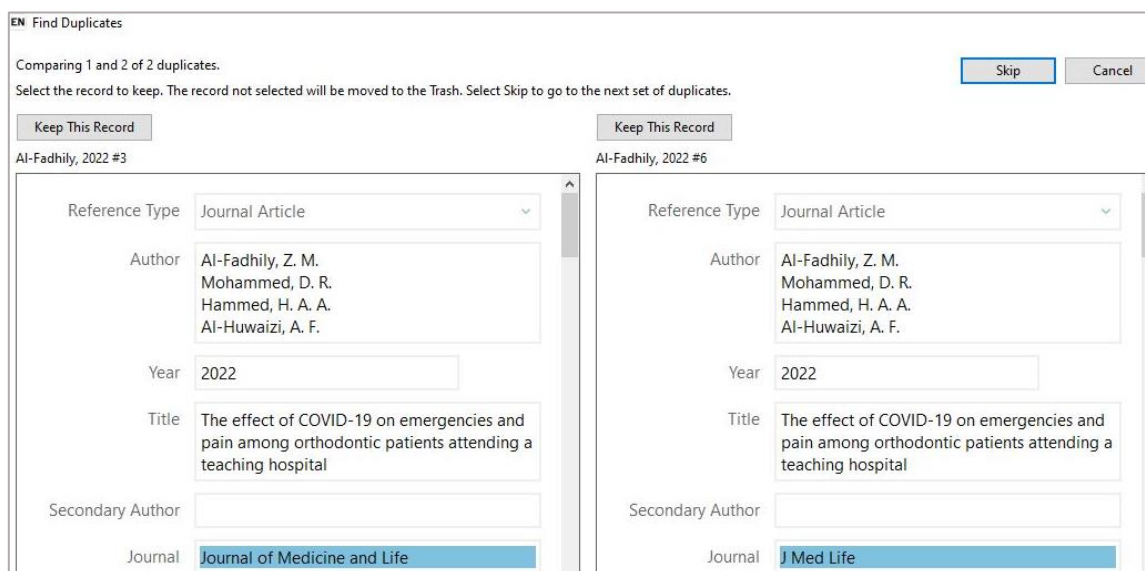
- Select the **Keep this Record** button for the reference you want to retain

6. PDFs and Full Text

It is possible to store PDF articles and other documents within your EndNote library as well as their bibliographic details.

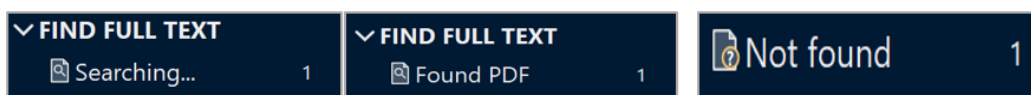### 6.1 Searching for free full-text articles PDFs from within EndNote

Some journal articles are freely available from websites, to check whether any of the references in your library fall into this category:

- Select the reference(s) and select **Search Web for Full text** icon
- The progress and results of the search are displayed on a line below in the left-side menu

- If EndNote finds a free full text version article in PDF it will attach a copy of the file to the **File Attachments** field of the reference
- If EndNote finds an article which is freely available in HTML, it will add a hyperlink to the article to the **URL** field or **DOI** field

This facility does not always pick up articles available to members of LJMU through paid subscriptions.

6.2 Attaching PDF articles in your EndNote library

To attach a PDF file to a reference from your OneDrive or other storage space, highlight the reference and select **Attach file** in the right-side panel, navigate to the file (PDF), select it and select **open.**

PDF files are stored in the PDF sub-folder within the .data folder, which accompanies your EndNote library.

6.3 Creating EndNote records from a collection of saved PDF articles

If you already have a collection of journal articles in PDF files, EndNote may be able to create records for them automatically. This only works with PDFs created recently by publishers who embed bibliographic data (typically a DOI) in the documents (see section 3.2.5).

6.4 Opening PDFs attached to references in EndNote

To open a PDF file attached to a reference, select the reference and then select the **PDF** dropdown menu for options to open the PDF:
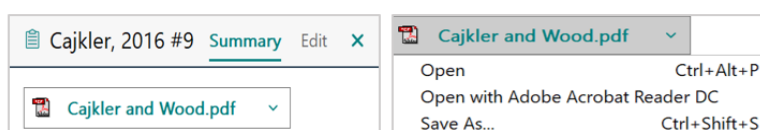

To open a hyperlink in a reference select **Edit** option or if you have added URL to your display panel (via Cog) then right click on the link and select **Open URL.**
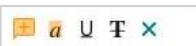
PDFs attatched to EndNote references can also be viewed via the **PDF** option, this loads the PDF into panel with options to print, email or open the PDF in a separate window.

6.5 Annotating PDF files

You may find it useful to make notes or annotate PDFs when you are reading/assessing them.
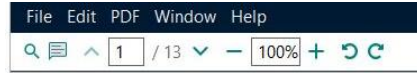
A PDF opened in EndNote has a toolbar:

Select the **Markup/annotation** icon to see a submenu: to add sticky notes, highlight and underline or cross out text.

There is also the option to hide any markups or annotations if you right click on the PDF.
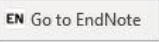
7. Citing and generating a list of references list in a Word

EndNote has a "Cite While You Write" (CWYW) feature which allows you to incorporate references from your EndNote library in a Word document as you write it.

7.1 Inserting a reference(s) into a Word document

- Select the **EndNote 20** tab within Word
- Check that **Instant Formatting** is on:
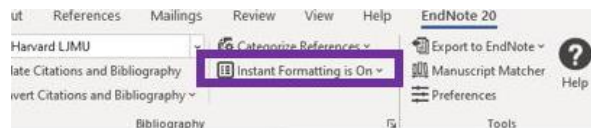
- Place the cursor at the point in the text where the reference should appear

- Select **Go to EndNote**

- Select the reference in your EndNote library, select **Insert Citation**

OR

In Word select **Insert Citation** , search for the reference, highlight it and select **Insert**:

OR

In EndNote: highlight the reference you wish to insert then select **Tools**, then **Cite While You Write (CWYW)** and **Insert Selected Citation(s)**:
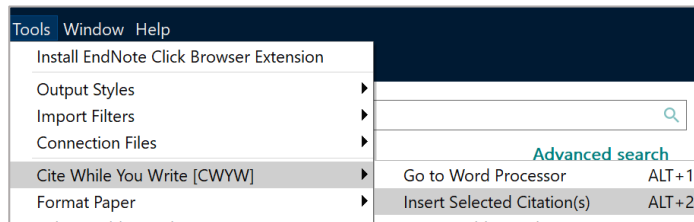
It may take a few seconds for the citation to appear and the full reference to appear at the end of your Word document.

Each time you insert a reference a brief citation appears in the text and the full reference is added to the reference list at the end of the document. To insert several references as a multiple citation, select the references in your EndNote Library and follow the above instructions.
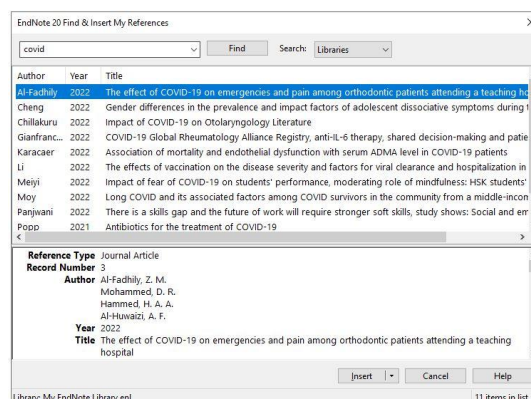
7.2 Editing and Managing Citations

You can edit a citation to change the citation display, add page numbers, a suffix or prefix. To edit a citation, select the citation in Word – it will appear greyed out. Select **Edit & Manage Citation(s)**

 . The reference will be highlighted in blue in the **EndNote 20 Edit & Manage Citations** dialog box:
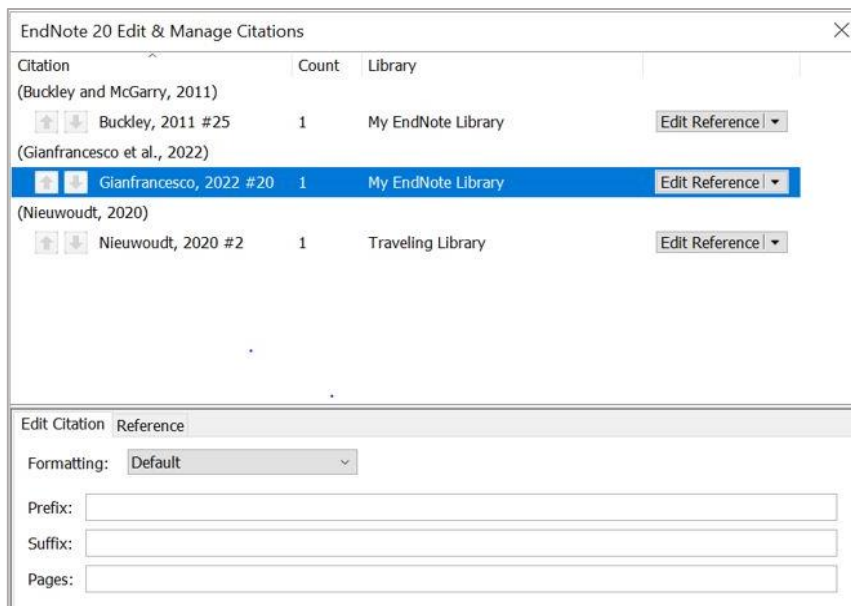
7.2.1 Author (year)

The default for a citation is (author, year). In the **Edit Citation** box, under **Formatting**, select **Display as: Author (Year)**. Select **OK** to save the change:

7.2.2 Add a Page Number

To add a page number to a citation for a quote type the page number in the **Pages** field in the **Edit Citation** box, select **OK** to save the change:

7.2.3 Add a Paragraph or Line Number

To add a paragraph or line number to a citation for a quote from a web page type the paragraph or line number starting with a space in the **Suffix** field in the **Edit Citation** box, for example, **para.4** select **OK** to save the change:

7.2.4 Add a Start Time

To add a start time to a citation for a quote from an audio or video source type the start time (using the 24-hour clock) starting with a colon and then a space in the **Suffix** field in the **Edit Citation** box, for example, **: 00:04:30** select **OK** to save the change:

7.2.5 Secondary Reference/Source

To indicate a secondary reference, you will need to type the additional citation details in the **Prefix** field in the **Edit Citation** box:

- To enclose the whole citation in brackets: put **author, year cited in** and put a space after cited in

- Enter the page number in the **Pages** field, select **OK** to save the change:

- To display the author outside the bracket, enter **year cited in** and put a space after cited in
- Enter the page number in the **Pages** field, select **OK** to save the change. You will need to manually type the secondary reference author(s) name directly before this citation in your Word document:

7.2.6 Remove a Citation

To ensure that a citation is removed cleanly from your text and from the list of references at the end of the document unless you have referred to it elsewhere in the document:

- Select the citation in Word – it will appear greyed out
- Select **Edit & Manage Citation(s)**

The reference is highlighted in blue in the **EndNote 20 Edit & Manage Citations** dialog box.

- Select the **Edit Reference** drop-down menu and select **Remove Citation** and select **OK** to save the change

If this is the only time the citation appears in your document, then the reference will be removed too. If it this citation is elsewhere in the document only the highlighted citation is removed, the reference will remain.

7.3 Referencing Styles in Word

To change the referencing style in your Word document, use the **Style** drop-down menu.

If necessary, you can change the font and/or size of the text in your reference list to match the font and/or size of the text in the body of your essay. To do this:

- Select the **arrow** in the bottom corner of the **Bibliography** box on the EndNote 20 tab:
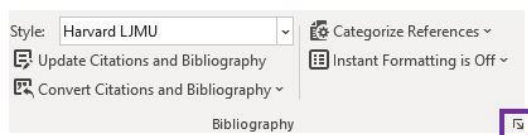
- Select the **Layout** tab and select the appropriate font and sizes
- Select **OK** to apply changes made

There are also options under the **Layout** tab to add a title to a reference list, to change the line spacing within and between entries on the list and change the depth of the indent for the second and subsequent lines within entries.

7.4 Removing EndNote Code and Converting to Plain Text

If you wish to remove field codes and disconnect your Word document from your EndNote Library you will need to save the formatted citations and reference list as plain text:

- Open your Word document and make a backup copy of your document by selecting the **File** and **Save As** to save this backup copy with new name

- Using the backup copy of your document, on the EndNote 20 tab, select **Convert Citations and Bibliography**

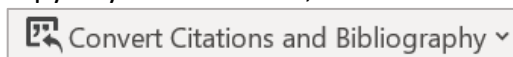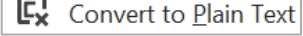- Select **Convert to Plain Text** from the dropdown men. You will be prompted to continue and save this copy of your document without field codes which will disconnect from EndNote.

Please Note: This plain text copy does not contain Cite While You Write field codes, so you cannot reformat it with Cite While You Write. If you need to reformat your document, you will need to go back to the original document, which retains field codes and links to your Endnote library and then repeat the above process if you need to save a plain text copy of your document.

7.5 Printing selected references in a specific style

- In EndNote select the **All References** panel and then select the references you wish to print
- From the **File** menu select **Print**

7.6 Copying selected formatted references from your library into a Word document

This is useful if you need to add references formatted in a particular style to a Word document written without using EndNote's "Cite While You Write" function or need to add a Bibliography as well as a Reference List after you have converted your document to plain text (see section 7.4).

- Select the references in the **All References** panel

- Select **References** on the toolbar, select **Copy Formatted Reference**

- In Word paste the references into the document at the appropriate point – make sure you have manually inserted the citations at the appropriate place in your document

8. Combining chapters into a single Word document and one reference list

You can combine chapters into a single Word document and one reference list if you have used the same EndNote library for all the Word documents. First you should make copies of all the documents containing your individual chapters, for example: 1chaptercopy.docx, 2chaptercopy.docx, etc. Work with these copies so that you can return to the original documents if you have any problems.

- Open your first chapter backup copy document for example: 1chaptercopy.docx in Word
- This will become the master copy which will contain all the chapters
- On the EndNote 20 tab in Word, select **Convert Citations and Bibliography** and select **Convert to Unformatted Citations** option
- Your citations will now appear in their unformatted state, for example: {Baker, 2007 #22}, and the reference list at the end of this document will disappear
- Open your second chapter backup copy document, for example: 2chaptercopy.docx in Word and unformat the citations as above
- Select and copy the entire text of the second chapter and paste it into the end of your first chapter copy document
- Repeat above steps with the remaining chapters until you have copied them all in sequence

You may now wish to rename your 1chaptercopy.docx as, for example: mastercopy.docx

- Open your Endnote library, if you have not already done so as you now need to reformat the citations in your mastercopy.docx.
- Check that the correct referencing style is displayed in both EndNote and Word
- On the Endnote toolbar in Word select **Update Citations and Bibliography**

EndNote will scan the new document for citations and generate a single, new reference list at the end of the document. If it finds any mismatches between author name and reference numbers in your document and EndNote library, EndNote will prompt you to specify which item you wish to cite.

9. PowerPoint: Adding references into slides
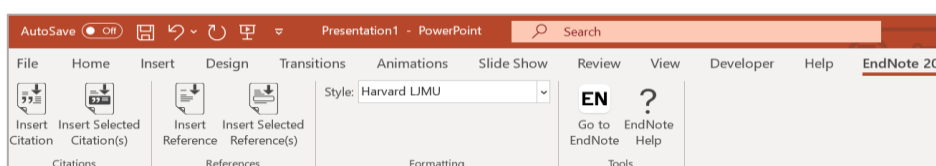
- Open a PowerPoint and check your Style is correct
- Select the **EndNote 20** tab and select **Go to EndNote** - check your style is selected
- Select the required reference(s) in **EndNote**

- In the PowerPoint slide select **Insert Selected Citation(s)**

- On the last slide and select **Insert Selected Reference(s)** from the PowerPoint ribbon to create the reference list

10. Making a back-up copy of your EndNote library

It is always a good idea to make a back-up copy of your EndNote library regularly. A compressed library file saves your **MyEndNoteLibrary.enl** file, its associated .**Data** folder, and all its contents to a single compressed file.

10.1 Creating a Compressed Library File

- Open your library in EndNote

- From the **File** menu, select **Compress Library (.enlx)** to display a Compressed Library dialog box

- Use the radio buttons to choose from these options:
  - Specify whether you want to **Create** a compressed library or **Create & Email** the library
  - Specify whether you want to **With File Attachments** with the library or not
  - Specify whether you want to save **All References In Library**, only the **Selected References**, or only the references in a specific **Group/Group Set**
  - Select **Next** to display a file dialog

- Save the compressed library to a different location from your working library, for example, OneDrive. You can rename the file if you wish. **Please Note:** NEVER open your compressed EndNote Library from your OneDrive

- If you select **Create & Email**, EndNote will launch your default email system, create a new email message, and attach the compressed library file to the email. Add the email address of the recipient, the subject, and message and select **Send**

10.2 Restoring a Compressed Library File

- Copy the compressed library file to the hard drive of your device

- Open this version of the **.enlx** file via **Open** on the **File** menu in EndNote

- This will extract the **.enl file** and the **.Data folder** to the same folder where the. enlx file is located

- Use EndNote to open the **.enl file** as normal to use the library

11. Troubleshooting

Accessed date in references to webpages not displayed
Different referencing styles take the access date information for references to web pages/documents from different fields. Check there is a date in the **Access Year** and **Access Date** fields, the **Latest Update Date** field and the **Year Cited** and **Date Cited** fields.

Amended reference in EndNote library not appearing in the Word document
Open your EndNote library and Word document, check that the appropriate style is selected in both. In the EndNote 20 tab in Word select **Update Citations and Bibliography** in the **Bibliography** box.

Details are not displaying in the references

Some styles will not display all the details you provide about items. If a reference to a journal article includes a URL which is need in the in the reference in a Word document, change the reference type from Journal Article to Electronic Article in EndNote.

Organisation displayed incorrectly

Enter the name of an organisation/society/government department in the author field followed by a **comma** immediately after the name, for example: **Liverpool John Moores University,**

If the name has a comma, insert a **second comma** immediately after the one in the name rather than at the end of the name, for example: **Department for Business,, Innovation and Skills**

Citation looks strange

For example: "{Smith, 1981 #18}" when it should be (Smith, 1981). Check that **Instant formatting is On** in the EndNote 20 toolbar in Word. If it is Off, select the button to turn it on.

12. Further help

- EndNote Canvas Course: https://canvas.ljmu.ac.uk/enroll/EDA36F

- Help menu in EndNote or in the EndNote 20 tab in Word

- Websites: http://clarivate.libguides.com/endnote_training/users/en20 and https://www.youtube.com/user/EndNoteTraining