

**University of Cambridge Computing Service**  
**Computerized Bibliography Using EndNote 20**

*Rosemary Rodd*

**PC**

This course is intended as a self-paced, hands-on introduction to EndNote. I will run through the process of using EndNote on my own machine and you can then try out the exercises in this workbook.

### **About this course**

This course deals with the bibliography software package EndNote. EndNote is available in both Macintosh and Windows versions and Cambridge University members can get a free copy via the academia website <https://cambridge.store.academia.co.uk/endnote.html> When you leave Cambridge you will need to delete the software or purchase your own license, but there is a free browser-based version of the software which you can use to maintain access to your saved records if you don't want to purchase. When you set up EndNote synchronisation your references are copied to the same location as ones created directly in the free online version.

EndNote 20 is the most recent version but completing this course will help you with older versions too.

This course only deals with the full-featured version of EndNote (EndNote Desktop) and assumes you have installed EndNote on your local computer before the course.

### **Introduction to EndNote**

1. EndNote is a program that stores bibliographic references, and notes about those references. The references are all stored in an EndNote **Library**.
2. EndNote acts as a helper program for Microsoft Word to enable you to create a bibliography and bibliographic citations within your document.
3. New references can be added to your **Library** by
  - a. typing (or copying and pasting from another source)
  - b. downloading from an online database (or library) to a text file and importing the file into the **Library** [this is the most common method]
  - c. connecting to a (suitable) online database, searching for references, and importing them direct
4. References can be to many types of information source; some of the ones that EndNote understands are:

• journal article	• electronic source
• book	• conference proceedings
• book section (chapter within a book)	• edited book
5. When you enter information about an **Author** or **Editor** into EndNote fields, always type **Surname, Forename(s)** or **Surname, X. Y.** where X and Y are initials.
6. By choosing a suitable **Output Style** you can later choose how you want the information to appear in the Word document (i.e. **Surname, Forename**; or **Forename Surname**), and whether you want Forenames to be abbreviated to initials. Those decisions are made later.
7. Similarly, when entering a **Book Title** or a **Journal Title**, you don't need to worry about whether it is

eventually to be printed in italics or not. When entering a **Year**, you don't need to know if the year will eventually be printed with brackets round it. Ranges of pages are just entered as numbers, without deciding whether to put **pp.** before the numbers. Again, those are the jobs of the **Output Style**. You just need to enter the information, not any details of how you wish to see it in print.

8. Having produced a **Library** with some bibliographic entries in, you can then start writing a document with MS Word. When you want to create a bibliographic citation in your document, you use EndNote's searching features to find the correct entry by **Author**, **Title**, or **Keyword**, and EndNote's powerful **Cite While You Write** feature then inserts a citation into your text at the correct point and adds a bibliographic reference at the end of the document. The style (contents and layout) of both the citation and of the bibliographic reference depend on the **Output Style** that has been chosen, and this can easily be changed without retyping. Bibliographic citations can also be entered in footnotes.
9. EndNote provides a large number of **Output Styles**, including those relevant to many major journals and publishers. We at Cambridge have added a number of styles locally (and have improved a few existing ones), and those can be freely downloaded from us.
10. It is possible to alter **Output Styles** to suit your own needs; however, it is exceedingly difficult to get them right, and we cannot teach you to do this in the class situation. If you have particular requirements to alter a style, or to create a new style, please contact us and we will help you individually.
11. We recommend that you create only one EndNote **Library** for all your work; if you need to distinguish between entries that refer to different subjects, use suitable **Keywords**, or set up **Groups** within your library to sub-divide it.

#### Example of typing a new reference into EndNote (*this example is an Edited Book*)

##### The reference as it appears in a printed document:

Hassall, W., and J. C. Beauroy, eds. (1993) *Lordship and Landscape, Norfolk 1250–1350*, British Academy Social and Economic History, Oxford: Oxford University Press.

Break it down into its component fields and enter them in a new blank reference as follows:

Field	Type into EndNote	Notes
<b>Editor</b>	Hassall, W. Beauroy, J.C.	<i>Each editor on separate line. Surname comma space initials. Don't type , and or , eds.</i>
<b>Year</b>	1993	<i>No brackets round year</i>
<b>Title</b>	Lordship and Landscape, Norfolk 1250-1350	<i>Don't type italics or final comma</i>
<b>Series Editor</b>		<i>Leave blank</i>
<b>Series Title</b>	British Academy Social and Economic History	<i>Don't type comma</i>
<b>Place Published</b>	Oxford	<i>Don't type colon</i>
<b>Publisher</b>	Oxford University Press	<i>Don't type full stop</i>
<b>Keywords</b>	landscape farming Coke of Norfolk	<i>Each keyword on separate line. No punctuation round keywords</i>

*This section is just for information. NOT to be obeyed!*

## Working with EndNote start obeying these instructions here for the practical

*This part of the notes is the practical session. You will find it worthwhile to try all of it, even if you have used EndNote before.*

The last part of the notes is for you to read later. It contains hints, warnings, and techniques for using facilities that we cannot provide for everyone on the course.

**NOTE:** some instructions are labelled **PC** or **Mac** — obey the correct ones for your machine.

Before you start – download the EndNote sample file from the Files tab. This is a compressed sample EndNote library

### 1. Starting EndNote

1. Double-click the EndNote program icon or select it from the Start menu.
2. Choose **File > open library** and select the file called Sample\_Library\_20.enlx Click “**Open**” and EndNote will automatically expand this into two parts: Sample\_Library\_20.Data (a folder containing settings and any file attachments you add to your references) and Sample\_Library\_20.enl (your library of references). This pair must *always* be stored together as EndNote must open them both simultaneously.

### 2. The Library window

The **Library window** lists all the references currently in the **Library** and, by default, displays the author’s surname, the year, title, journal, date of last update and reference type for each item.

You can browse in the Library window using the scroll bars, the scroll arrows, or the arrow keys. The window layout can be changed (via **Preferences**) and re-sized.

Windows can be moved by dragging the title bars. If you accidentally close the Library window don’t worry – all your entries are safe as EndNote continually saves as it goes along.

### 3. The Reference Window

Click the reference with author **Bird**.

Details of the reference will appear in the side panel to the right. There are three tabs [Summary, Edit and PDF].

**Summary** shows you the contents of the entry, **Edit** allows you to make changes and **PDF** displays any files attached to the entry. Clicking the caret visible bottom right displays the entry as it will appear in your Word document when using the currently active style and the pulldown style menu lets you see the effect of changing the style.

### 4. Typing a new reference

1. From the **References** menu choose **New Reference** (or press **ctrl/n** [PC] or **command/n** [Mac]).
2. An empty **Reference window** opens with ‘**New Reference**’ displayed at the top.
3. A new reference always appears as a ‘**Journal Article**’ but this can be changed using the drop-down **Reference Type** menu at the top. If your New Reference window seems to contain the wrong fields, or lacks fields that you need to fill in, it is probably because you have chosen the wrong Reference Type.

For this example, create a **Book** reference.

Authors’ names should be entered in the order ‘**Last, First Middle**’ e.g. **Jasmin, Carole M.**

Each individual author **must** be typed on a separate line.

1. With the cursor in the **Author** field, type:

**Jasmin, Carole M.**

(including the space after the comma, and the full stop)

As you type, you may see EndNote suggest names similar to the one you are entering. This is EndNote's way of making it easier to enter new references.

The name you are typing is a new author in this database, so keep typing until you complete the name.

It appears in **red** to show that it is a new name that hasn't previously been used in this library.

When you close or save the reference, the name will be remembered and the red text will change to black.

**Never** type 'and' between two authors' names – **always** start a new author on a new line.

2. Press the **Enter (Return)** key to accept the first name.
3. Now start entering the second author: **Roe, Jennifer**
4. Continue entering the data as follows, using the **Tab** key to move to the next field, **shift/Tab** to move to the previous field (you can also click a field with the mouse). If the fields you are trying to fill in seem to be missing, it's probably because you haven't changed the **Reference Type** to **Book**!

<i>Year:</i>	1999	<i>Number of Pages:</i>	100
<i>Title:</i>	Impacts of meteorites on Earth	<i>Abstract:</i>	The impact of a meteorite hitting Earth millions of years ago may have led to the extinction of some life.
<i>Place Published</i>	New York		
<i>Publisher:</i>	Blackcourt Press		
<i>Keywords:</i>	meteorites extinction dinosaurs		

5. You do **not** need to put titles in italics, or surround them with quotation marks, or surround dates with parentheses – EndNote will do that for you later.
6. Type each *Keyword* on a separate line.
7. Once the reference is finished always *close* it before trying to type another one—it is not saved until you do. Answer "yes" to the prompt to save it.

## 5. NOTES:

1. **Don't** close the Library window before you close the Reference window or you will lose your newly-typed reference. Close the Reference window by clicking its close box or by choosing (in the *File* menu) *Close Reference* (**ctrl/w** [PC] or **command/w** [Mac]). At this point you may be asked if you want to save the new reference or discard it. Obviously, save it, and it will appear in the Library window.
2. If you have made a mistake while typing a reference, just re-open the reference, make corrections, and close it again.

## 6. Output Styles

A reference can be **selected** by clicking once with the mouse, using the arrow keys, or typing the first few letters (without pausing) of the first author's name.

1. Click once on the reference with author **Bundell** so that it is displayed in the right-hand pane. Click (caret bottom right of right-hand pane) to change the display to show how it will look in the bibliography.

EndNote stores references in raw form, so (for example) book and journal titles are stored without italics and not underlined. In order to preview a reference, a style (chosen by you) is applied to turn the raw information into a proper printed bibliography entry.

### Mark some output styles ready for future use:

1. From the *Tools* menu choose *Output Styles*, then *Open Style Manager*. When the dialogue box opens you may need to re-size it in order to view the styles.
2. Put a check mark against '**APA 7th**', '**MLA**', and '**Harvard**' (this adds these to your favourites, but doesn't change anything else on the screen).

3. **Don't** click *Edit*. **Close the Style Manager box.**
4. From the *Tools* menu choose *Output Styles*, and you will see that shows the styles which you ticked have been added to the favourites list.
5. Once your favourites list is set up, you can change styles quickly in a Word document using the menu on Word's EndNote tab. The style selected in Word is the one which controls how your document looks.

## 7. **Sorting your Library**

Click on a column heading to sort by that field. Try this on the '**Year**' field. Then sort back into author order. Clicking a heading again will reverse the sort order (e.g. from A-Z to Z-A). This can be a useful way to locate (for example) recently added references as you can use the Preferences to display the date when references were added to the database then sort.

## 8. **Searching for references in your library**

To generate a list of all stored references about '**parrot**' that were published in or after **2010**, click the Advanced Search button (top middle pane).

You will see a set of pull-down menus.

1. Set the first menu (initially labelled **Author**) to **Any Field** (this is above **Author** in the list).
2. Type **parrot** in the first **search box** to find references that have '**parrot** in '**Any Field**'.
3. Leave the drop-down menu next to them with the default '**Contains**'
4. Leave the option between the two **search items** as '**and**'
5. In the second line, set the **field menu** to **Year** and choose '**Is greater than or equal to**' from the drop-down menu (middle).
6. Type **2010** in the second search box
7. Click '**Search**' to begin.
8. EndNote displays the results which satisfy the search criteria.
9. Try the effect of changing "**Is greater than or equal to**" to "**Is greater than**". You should find the 2010 reference disappears from the results.

## 9. **Select a Style and preview the references you have found**

EndNote's **output styles** (or just **styles**) represent the rules for creating bibliographies for a variety of publications. The styles determine how your references look when you print, export, preview, or create bibliographies with EndNote. When you are writing an article for publication in a particular journal, find out from their 'Instructions for Authors' which style they require for bibliographic entries.

1. Select all the references you have just found. (Click the central area then ctrl/a).
2. From the *Tools* menu, choose *Output Styles*, and then (in the **lower** section) select '**Numbered** (a style which prints the references with numbers).
3. From the *File* menu choose *Print* to see how your references would appear on the printer. Click *Close*.
4. Clear the search to return to viewing your complete library.

## 10. **Adding some references**

There are various ways to get references into EndNote and generally the most convenient method is to download them from public bibliographic databases such as **PubMed** or **Web of Science** or directly from the publishers' websites. The following exercises demonstrate some of the possible methods. Generally you won't need to type in references

if they exist in electronic form – for example in an online library catalogue if you are referring to books.

The University Library provides a downloadable browser plugin that will “proxy” browser connections to any subscription databases that are available to Cambridge University members. This makes it possible to use those databases even if you are not logged in from a University computer.

**<https://www.libraries.cam.ac.uk/eresources/access-full-text-anywhere>**

If you have the plugin installed you’ll notice that some websites will pass you over to the plugin before continuing to the site, with the string “.ezp.lib.cam.ac.uk” added to the site URL.

#### **11. Using a filter to import references saved from an online database**

Many online databases will allow you to save your found references in tagged text format from the Web and then import them into your reference software using a filter (template). Sometimes EndNote is able to recognise the downloaded file and import it automatically; at others you may need to select a filter template manually.

1. Open a browser and go to the site **<https://pubmed.ncbi.nlm.nih.gov>**
2. Enter **cuniculi** in the search box near the top of the screen and click **search**.
3. Click the check boxes beside the first 20 found references to mark them for export.
4. Click the **Send To** button.
5. Select **Citation Manager** as the option.
6. Click **create file**.
7. You should see the name of your downloaded file appear at the bottom of the browser window with a message offering to open it. Click the **Open File** link and you should see your references almost instantly appear within your EndNote library. You should receive a message if any duplicates have been discarded. Any existing references are temporarily hidden.
8. The imported references are stored in a temporary folder which means you can examine them and do things like editing them all to add a note or keyword.
9. To go back to displaying *all* your references sorted by author, click the *All References* link.

#### **12. Try using a different public database**

1. In your browser, connect to JSTOR via: **[www.jstor.org](http://www.jstor.org)**.
  2. By default you are offered a box to do a basic search. Look for something relevant to your research interests. Click the left-hand check-boxes to select some of your found references for download.
  3. Click **Export selected citations** and then the link labelled **Export a RIS file** (this sets the download as an export format which EndNote can read).
  4. Click the **Open File** link when the file has downloaded.
  5. Your *new* references should appear in the currently open EndNote library's window and you should receive a message if any duplicates have been discarded. Any existing references are temporarily hidden.
  6. If you had existing references, click *All References* to display all your references sorted alphabetically
- RIS is a common standard for references but other, proprietary, formats exist so you may need to experiment if the database you need only offers a less standard export format.

#### **13. Importing references from PDFs that you have already collected**

EndNote can be instructed to import the contents of a folder where you have a store of PDFs. The program will attempt to extract the embedded “metadata” such as author name and article and journal title to create a reference to which the imported PDF is automatically attached.

This process usually works well for recent PDFs, particularly in the scientific disciplines, but will fail if you are importing older PDFs, which are simply images with no embedded text, or magazine articles which do not include standardised metadata. It will usually also fail for pre-prints which do not yet have fixed meta-data.

1. Choose **File > Import > Folder**
2. Select the folder containing your saved PDFs
3. Set **PDF** as the import option.
4. Click **Import** to start the process.

EndNote will attempt to import your PDFs and associate them with reference data. This will usually only work for recent articles which contain a **doi** [Digital Object Identifier].

#### **14. Set up a "Watch Folder" for downloads**

EndNote 20 can be set up to monitor a particular folder and try to import any PDFs which have been added to it. After successful import, a copy of the PDF is saved in EndNote's .DATA folder and the original is moved to a folder called "imported" which is created inside the monitored folder to prevent files being imported more than once.

1. Create a new folder inside **Documents** and give it a suitable name, such as "EndNote Downloads".
2. Go to EndNote and select **Preferences**
3. Select PDF Handling
4. Check "Enable automatic importing" and select the folder where you will be downloading articles.
5. Select the auto-renaming options you prefer (will rename the PDFs copied to .DATA but not the originals).

EndNote should now try to import any PDFs that are downloaded to the monitored folder.

#### **15. Using a connection file to search and download from an online database**

EndNote is able to search some databases directly but many of those it offers require a login as they are subscription only. This exercise uses a few of the connections which we know will work.

1. Select **Tools > Online Search**
2. Scroll down to **PubMed (NLM)** – this is a free biomedical database
3. Change the first menu button to **All Fields** and enter 2021 in the **Year** field
4. Enter **Parrot Social Behaviour** in the first field
5. Click the search button
6. Use **Ctrl/Click** or **Shift/Click** to select some of the references
7. Click the Plus icon immediately above the references to add them to your library.

#### **16. Using EndNote with Web of Science**

1. Open your web browser
2. Go to <https://www.libraries.cam.ac.uk/eresources>
3. Click the Databases list, then **W** and select **Web of Science**, then click **Go**
4. Enter your Raven identifier and password if requested.
5. If you have already registered with EndNote you can just click Sign in and login with your EndNote details. Otherwise, enter your details to create an account.
6. Web of Science will offer you some tips on searching, however for the moment just enter something in the search box and click the Search button.
7. To export your found references to EndNote just select the check boxes by the ones you want then pull down the export menu above the list of references. Choose the option to export to EndNote desktop, select whether you want the full record or just Author, Title, Source, and click Export.

8. Click the exported file to open it with EndNote – the contents will be added to your current open EndNote library.

## 17. Find Full Text

EndNote can search for available online full text of references contained in your library.

1. Select the references from your last search (Click the **Imported References** folder, place the cursor in the references pane then ctrl/a).
2. From the **References** menu select **Find Full Text>Find Full Text**.
3. You may get a copyright warning. If so, simply click OK to acknowledge it
4. EndNote will search for online copies of the full text. Not all periodicals are available online, and in general scientific articles are more likely to be found than humanities ones.
5. You should notice that more of your downloaded references now have a “paper clip” icon beside them in the Library window. Click the PDF icon in the right hand window to view it.

Find Full Text is still a bit hit-and-miss; not all available PDFs will be discovered and you may well find that preprints are not downloaded because they are not available via journal link resolvers.

You should avoid running Find Full Text on very large numbers of references as this may cause the journal site to block access from your IP address. It's best to use it in small batches as you search and download, rather than collecting a huge number of references and leaving Find Full Text to run while you do something else.

Warning! The linked PDF files are actually stored *inside* the **.DATA** folder which is associated with your EndNote library. If you accidentally delete this folder ALL your attached PDF files will be lost!

## 18. Annotating your saved PDFs

1. Select a reference which has a PDF attached.
2. In the right-hand pane, click the PDF tab, then click the “Open PDF” icon.
3. Try the effects of the annotation tools which open when you click the “quotation” note icon.

Notes are searchable and can be retrieved using text searches of your library.

## 19. Using Term Lists

1. When you start typing into the Author, Journals, or Keyword fields, EndNote will try to auto-complete anything that you type, thus saving you typing time and ensuring consistency of spelling. In order to do this it creates **Term Lists** which are simply internal lists of names which it has met before.
2. It is useful, from time to time, to open these **Term Lists**, particularly the **Authors Term List**, to check that your spellings are correct and that you are entering fields correctly. In EndNote's **Library** menu, choose **Open Term Lists**, then **Authors Term List** (or whatever).
3. It is possible to edit the **Term Lists**, and to delete items from them. Note, however, that this does *not* change all your existing bibliography entries which contain those items.
4. You can also create additional **Term Lists**, to save typing and to ensure consistency. For example, you could create a **Term List** linked to the **Publisher** field.
5. The **Term List** for **Journals** has special properties which EndNote uses where the output style requires use of standardized abbreviated forms of the journal title. To make this work for your own discipline you need to read in one of the standard lists which are supplied with the program instead of simply allowing EndNote to add journal names as new references are imported or keyed-in.
  - a. **Library > Open Term Lists > Journals Term List**
  - b. Click the **Lists** tab
  - c. Click **Journals** then the **Import List** button
  - d. Select the list which is most relevant to your work and click **Choose** (you can import more than one



list). On a Macintosh computer you may need to browse to locate the EndNote program folder.

- e. Click the **Terms** tab and you will see that the list has been populated with journal names and their standard abbreviations.
- f. If you use imported Term Lists you should not use the Update List facility as this will add non-standard names based on your own library. If you already have some non-standard journal names you may need to delete these before importing the standard Term Lists.
- g. To switch off automatic updating of Term Lists select:

**Endnote > Preferences > Term Lists**

and un-check the options to update the lists. Sadly at present it's not possible to turn off automatic updating for just the journals Term List, however you can still run a manual update to capture authors and keywords.

## **20. Writing a paper and citing references using EndNote**

The EndNote Add-in creates an additional Word Tab to give you direct access to your references while writing a document using MS Word. When you wish to insert a citation you simply click the tab in your Word document to retrieve it from your EndNote library.

1. With EndNote still running in the background, open a new, blank Word document. Type in a few lines of text, then type a space and position the cursor following it. Click the tab labelled **EndNote 20**.
2. You'll see a ribbon with a number of commands. We're going to use the simplest method of entering a citation.
3. Click the **Go to EndNote** button (to the left of the ribbon). This will switch focus to your EndNote library.
4. Click the reference you want to cite in the document. (You can use control/click to select multiple citations if needed).
5. Choose **Tools > Cite While You Write > Insert Selected Citation(s)**
6. Focus will switch back to your Word document and the citation will be inserted and formatted and a bibliography will be created at the end of the document.
7. Try the effect of changing the citation style using the pull-down **Style:** menu near the centre of the ribbon.
8. Now try the effect of creating a footnote using Word's **Insert > Footnote** command, then inserting an EndNote citation in the new footnote.

*Note that EndNote can't convert citations in footnotes into ones in the main body of the text so if you start off with footnotes, then decide you would prefer in-text citations, you would need to delete the footnotes and reinsert the citations.*

The website <https://www.cambridgestudents.cam.ac.uk/> has details of the thesis requirements for the various Cambridge degree committees and you should check what's needed for your own subject but also ask your supervisor who will be able to advise you in more detail. Some degree committees specify particular reference styles, currently these are:

- English – MHRA or MLA (using footnote variant of the style)
- MML – MHRA

<http://www.mhra.org.uk/style/>

<https://style.mla.org/>

The University Library has a page on referencing for different subjects

<https://libguides.cam.ac.uk/referencemanagement/subjects>

You should consult your supervisor, however in general MHRA footnote style is likely to be an acceptable style for humanities subjects, APA 7<sup>th</sup> for scientific ones, and OSCOLA for Law. Note that there may be very specific requirements for citing legal cases and only your supervisor is likely to be able to help if you are a legal scholar needing to do this.

If you need to add more text to the paper, **don't** over-type any in-text citations (this is because they contain special codes that allow Word and EndNote to format and unformat the references automatically).

If you end up with two adjacent citations that you want to merge, e.g. (Gardiner, 1988) (Schwartz, 1990) there is probably a space between them. Delete it then click the "update citations" link (middle of tab) to convert it to (Gardiner, 1988; Schwartz, 1990). Don't try to do this by typing in the semi-colon.

**Tip:** If you simply want a stand-alone bibliography of all your references there is no need to attempt to insert hundreds of citations in an otherwise blank file. The best option is to go back to the **EndNote** library and set the output style you want then choose "**Export**" from the file menu.

In the dialog box that appears pull down the "save as file type" menu to select Rich Text format (RTF).

This will produce a file which includes italics etc. and can be opened by MS Word. It is an ordinary file with no EndNote codes, so you can edit it if any manual adjustments are needed. By default it is sorted by author surname, but you can modify this by editing the output style. **Do not** use this file as a substitute for your EndNote Library: it is just a convenient way to print all your references in a readable format!

## 21. Accents, foreign scripts, and italics

The standard key shortcuts used by MS Word (on the PC) for inserting accented letters don't work in EndNote. If you have a lot of foreign-language material to enter, you can switch to a foreign keyboard but for occasional accented words the quickest option is to use the Character Map utility.

On a Mac you can use the normal Mac keystroke combinations for accents.

## 22. Backing up your database

It is essential that you keep backup safety copies of your database *separate* from your own computer (in case the computer itself is stolen or destroyed). The best way to produce your backup copy is to use EndNote's *Compressed Library* feature which bundles your library and its associated .DATA folder together and compresses them so that they can easily be copied or emailed.

We recommend that you store your *current* version of the library and .DATA folder in your documents folder NOT inside the EndNote program folder. NEVER try to put the .enl file INSIDE the .DATA folder—both will stop working!

**To create a compressed backup file:**

1. From EndNote's **File** menu select **Compress Library**.
2. Use the default settings (create new file, save all the library references, save all attached files) > **next**
3. Click **Save**.
4. The saved file will have the extension **.enlx** and can be dragged from Documents to a memory stick, emailed as an attachment or copied to OneDrive etc. If you need to restore your library from the backup simply start EndNote and open the compressed library with **File > Open Library** (don't attempt to use **Import** as this will scramble the record numbers).

## 23. Sub-divide your library with Groups or Smart Groups

You need to remember that these are *views* of your library, not containers in which references are stored—think of them as being more like circles on a Venn diagram than folders of notes. Groups can be very useful to help you keep track of different topics and it is possible to automate this by setting up "smart groups" which pick up references containing pre-set words or phrases.

1. Choose **Groups > Create Smart Group**
2. Give it a suitable name

3. By Default the first field used is Author. Click the pull-down menu beside it and scroll back to “Any Field + PDF with Notes” and select this.
4. Leave the “Contains” option as it is.
5. Enter the term you want to locate in the search box following “Contains”.
6. Click the **Create** button.
7. You should find that the new group isolates all of the references which contain the search term.\
8. You can also create “non-smart” groups and add items by dragging them.

### General warnings and advice

- **Try a sample before doing a lot of work**

Try a few references in the format you need to use for your thesis or book before producing the whole thesis or book and finding that you cannot get the format correct! Test printing the references and bibliography. Also, show a sample of output to your supervisor or publisher to make sure they approve of the layout.

- **Use only one EndNote Library**

If you are writing a multi-chapter document, you must keep all your references in a single EndNote Library. If you cite references using a different library for each chapter, it will be more difficult to produce a single bibliography at the end of your final document when you join the chapters together. If you create a document which contains references from several different EndNote libraries, you may cause EndNote to become so confused that it can no longer re-format citations, or you may find that it is continually asking you to confirm which references you really intend.

- **Unformat your references if you want to move text around in your documents**

If you want to merge several Word documents into a single file (for example if you want to join several chapters together), or if you want to move large chunks of text around using cut and paste, it is *vital* that you convert your citations to the *unformatted* state first (this means using the commands on the EndNote tab to convert the citations to the format {Smith, 2001 #19}). The curly bracket placeholders are simply text and can be moved around without any risk of corrupting the file, but attempting to move formatted citations and/or bibliographies can result in a file which no longer updates correctly.

- **Don't try to edit EndNote insertions in your Word document**

Always be extremely careful not to make any changes to citations or references in the bibliography except with the standard “edit citations” command.

You can see whether or not a piece of text is editable; if you click once in the text and it all goes grey, that tells you it has been inserted by EndNote and should not be edited, except with EndNote's own “edit citation” command! If you normally edit your documents using a lot of cut-and-paste to rearrange material I strongly advise that you work with your citations in the UN-formatted state – {Smith, 2000 #44} – which is simply text and can be moved about with no danger of corrupting the file.

- **Multiple adjacent citations**

If you need to reference several citations at a single point in your text, like this:

some text {Baginski, 1988 #17}{Belknap, 2000 #23}

don't put a space between them, because EndNote will not amalgamate them into the correct form. If you end up with two adjacent *formatted* citations, e.g. “some text (Baginski, 1988)(Belknap, 2000)” **DON'T** try to edit them yourself to a form like “some text (Baginski, 1988; Belknap, 2000)” but instead delete **both** citations and re-insert both of them together using EndNote (to select more than one reference in EndNote, use **ctrl/click** on a PC, **command/click** on a Mac).

- **Institutions as authors**

To type the name of an institution as an author, you need to add a comma at the end of the author field to avoid the last word being treated as if it was a surname and the others being converted to initials – for example “British Broadcasting Corporation” being printed as “Corporation, B.B.” The final comma forces EndNote to treat the whole name as if it was a surname without initials.

For example, for the reference: **Oxford University Computing Service (1988): *Micro-OCP*** you would type:

Author: Oxford University Computing Service, (including the final comma)  
Year: 1988  
Title: Micro-OCP

- **Find Full Text**

Avoid running Find Full Text on very large numbers of references at a time. This may cause the journal site from which articles are being downloaded to become overloaded and protect itself by blocking your computer's ip address. In the worst case scenario it may block access from the whole of your department or from the cam domain in general, which will make you very unpopular!

- **Backups and archiving**

We recommend that you always store an archive version of any *document* you produce using Word and EndNote with its citations in their *unformatted* state. This is particularly important if you are working on a large document with many reference citations. You can then return to the document to add sections to it, or more references. And if you want to publish a single chapter as a separate paper with a different output style, this is quite easy to do from the unformatted version.

**NOTE** – this refers to storage of the WORD document NOT your EndNote library, which must always be copied together with the .DATA folder without any attempt at manipulation or conversion to other formats other than EndNote's own compressed format.

We recommend that you store your current version of the library and .DATA folder in your documents folder NOT inside the EndNote program folder.

- **Document Types**

It can be difficult to decide what document type to use for an item which you've accessed via the Web or on an electronic device such as a Kindle. The APA style guide may help you decide what to select (including how to cite items on TikTok!)

<https://apastyle.apa.org/style-grammar-guidelines/references/examples>

Another helpful site for guidance on citation is <https://www.citethemrightonline.com>

- **Formatting Citations in a Document**

Note that the lineation and pagination of an unformatted document will in general be quite different from the final formatted version. The rule is: first concentrate on the content of your text (words and references and footnotes). When you are completely satisfied that your text says what you want it to say, then (and only then) tidy up the layout of lines, pages, footnotes, and your bibliography.

- **Backups and File Management**

As with all files you produce – on your own computer or on a public system – you should ensure that you back up your important files with at least *two* copies stored in different locations.

**DON'T** move, edit, or change any of the files within the **.Data** folder!

When you move an EndNote Library to another computer or backup device, ensure that you copy both the **.enl** file and the folder **.Data** or (preferably) use EndNote's Compressed Library option.

- **Creating a New Library**

If EndNote ever asks you if you want to overwrite an *existing* Library when creating a new one, always answer '**NO**'! Creating a new, empty Library with the same name as a Library containing references will *overwrite* those references, and they *cannot* be restored unless you have a backup copy. This is why it is dangerous to accept the default name for a new library since the next person to use the machine may do the same.

- **Obtaining EndNote**

You can get your own copy of EndNote free of charge for a personal device at

<https://cambridge.store.academia.co.uk/endnote.html>

- **Updated versions of Output Styles, Import Filters, and Connection Files available via:**

<https://support.clarivate.com/Endnote/s/article/EndNote-Install-Additional-Output-Styles>

- **Converting existing bibliographies from Word into EndNote**

If you have just a few references to convert, the simplest option is to open your EndNote Library and your Word document, and copy-and-paste information from Word into the correct fields in EndNote references (remember to select the type of reference: book, journal article, etc).

If you've been using Word's in-built referencing feature EndNote is able to extract these – just install EndNote including Cite While You Write and click the EndNote tab. Select **Export Word Citations** from the Tools menu.

- **Electronic resources available via the University Library**

The University Library's Electronic Resources web page is usually the best starting point if you do not know where to find a particular subject database: [www.lib.cam.ac.uk/eresources/](http://www.lib.cam.ac.uk/eresources/) (online journals and online reference databases are listed separately in two different tables).

- **Find Full Text on a personal machine**

When you use **Find Full Text** on your own machine you will need to set the Preferences so that EndNote connects via the UL's resolver.

1. Select **Edit>Preferences>Find Full Text**
2. Change the **OpenURL path** to: <http://tf5lu9ym5n.search.serialssolutions.com/>
3. Change the **Authenticate with URL** field to: <http://ezproxy.lib.cam.ac.uk:2048/login>
4. EndNote will now ask you to login using Raven when you first use Find Full Text in any session. Accept its warning that your information is being shared with the University Library and press the **continue** button past the list of databases to which login gives you access (this is just for information, you do not need to click on any of the links).

- **EndNote and LaTeX**

EndNote can easily be used to create a BibTeX file which can be used to create a LaTeX bibliography. Choose **File>Export** and set the export style to **BibTeX Export** with the **File Type** as **Text Only**. Click the **Save** button to create your BibTeX file.

#### ***Instructional videos on EndNote's Youtube channel***

<https://www.youtube.com/user/EndNoteTraining>

#### ***Warning about DropBox and similar services!***

Keeping an EndNote library in Dropbox, Box, SugarSync, OneDrive, or ANY cloud syncing service that automatically updates (other than EndNote Sync itself), will lead to corruption of the library over time. The problem is the way these services sync data to the cloud and other computers. EndNote libraries are made up of many files, and when you save data in the EndNote library, it saves that data in a specified sequence. The sync services send that data to the cloud out of sequence, and eventually this leads to library corruption. It happens over time, so even if you have kept your library in DropBox for months without apparent problems, that does not mean it isn't being corrupted.

EndNote's own Sync service is safe because it was created to “know” about the necessary ordering of the files.

#### ***Help!***

If you have any difficulties or further questions, please email: [service-desk@uis.cam.ac.uk](mailto:service-desk@uis.cam.ac.uk)