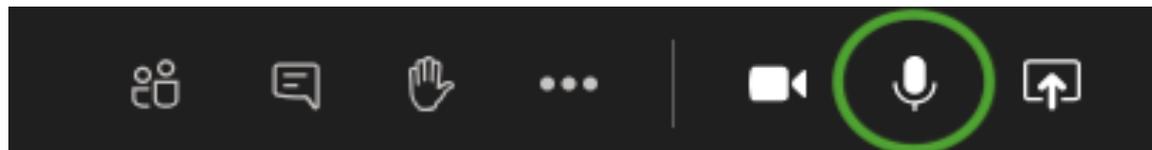# Introduction to EndNote

Ollie Bridle and Hannah Medworth

The webinar will be starting soon. While you wait, please mute your microphone.

Aims

COLLECTING REFERENCES

MANAGING REFERENCES

INSERT CITATIONS INTO DOCUMENTS

EndNote Desktop

EndNote application that is installed on to your computer.

Works on Mac and Windows.

You can install on up to three different machines.

Ensure that you download the software from IT Services - https://help.it.ox.ac.uk/how-to-get-software

Setting up EndNote Web

EndNote Web gives free access to references when away from personal computer.

Syncs with your desktop version of EndNote.

You need to be using EndNote 2025 to use EndNote Web.

Register at: https://web.endnote.com/login

Do not recommend using EndNote Web on its own.

Adding references

Options for adding references

1. Online search within EndNote

2. Export references from databases

3. Drag and Drop PDFs into EndNote

4. EndNote Click

5. Enter references manually

Online Search (1)

Click the database title you would like to search or click 'more...' to select a database not listed.

Online Search (2)

Enter your search terms in the search boxes at the top of the screen and click 'Search'.

Online Search (3)

You can increase the number of records on the page at the top of the results list.

Online Search (4)

Double clicking a reference brings up a summary of the reference in a pane on the right

Online Search (5)

Highlight references you would like to add to your library and click the plus button. They will be added to the 'recently added' area.

Exporting records from SOLO

Exporting items from SOLO

1. Login to **SOLO** using your **Single Sign On**

2. Search **SOLO** and mark some results by clicking the 📌 **pin** next to the item. They will save to 'Favourites'
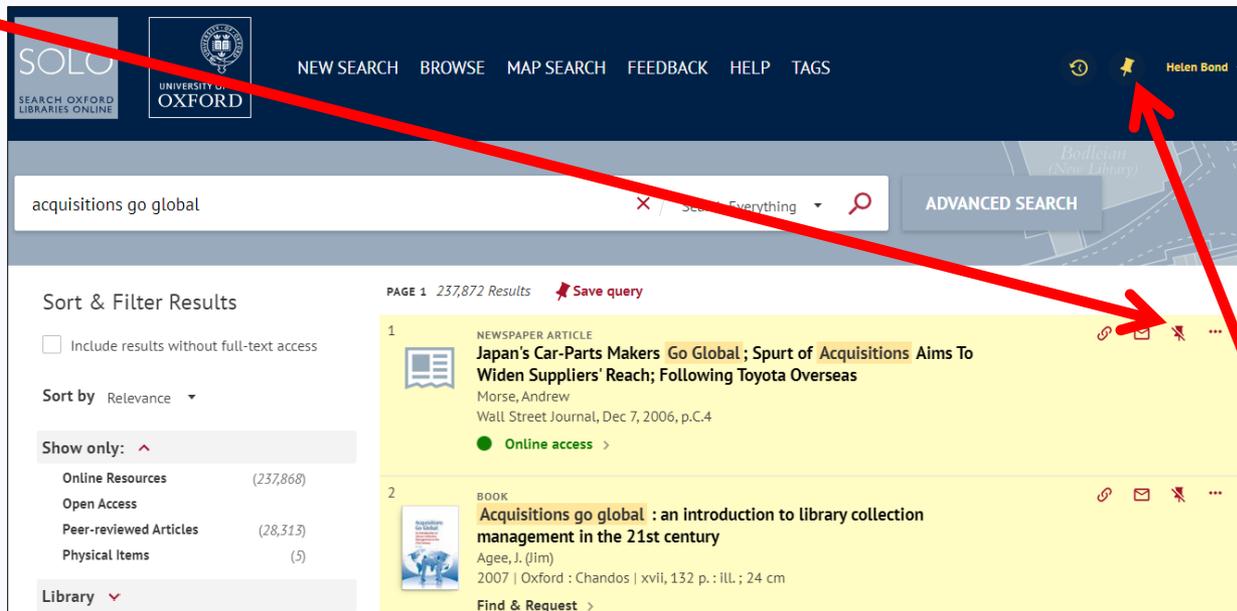
3. Access your **Favourites** for a list all of the records you have marked

Exporting items from SOLO (1)

4. **Select** the items you want to export.

5. Click the "'Push to' actions" three-dot icon and you can either select RIS or EndNote.

Exporting items from SOLO (2)

RIS	Choosing 'RIS' exports the record to the desktop version of EndNote so is good to use when on your machine which has EndNote installed.
EndNote	Choosing 'EndNote' exports the record to EndNote Online, which is a good option when you are away from your computer.

Exporting items from SOLO (3)

6. Alternatively, to export a single record, click the three-dot export button.
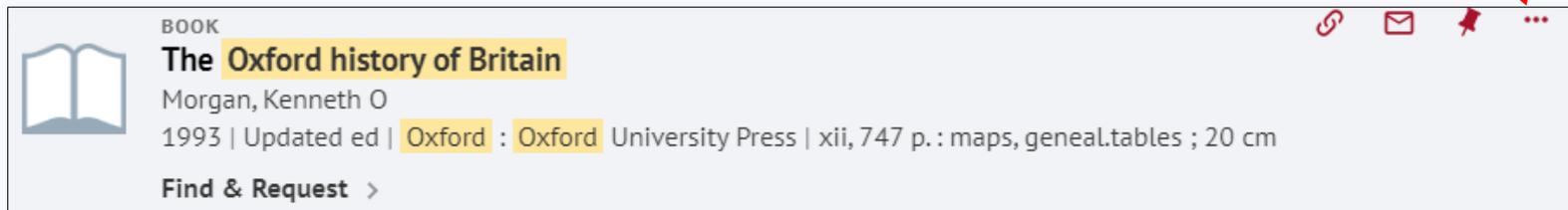
7. Choose **EndNote** or **RIS**.

Exporting items from SOLO (4)

Open

Always open files of this type

Show in folder

Cancel

delivery.ris
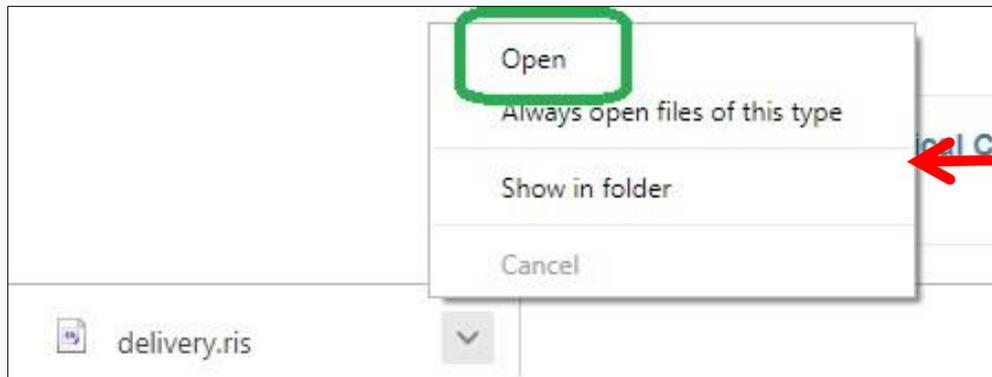
8. If you opt for the RIS option, your browser will download the RIS file. Click on the file to open it.

9. The RIS file will automatically be imported into your EndNote library under 'Imported References'.

File   Edit   References   Groups   Library   Tools   Window   Help

Imported References

Sync Configuration

All Referen...   1
Imported References 1
Recently Added   1
Unfiled   1
Trash   0
MY GROUPS
My Groups

Advanced search

Imported References
1 Reference

		Author	Year	Title		Rating	Journal	Last ...	Refere...
●									
●		Morga...	1993	The Oxford history of Britain		• • • • •		09/0...	Book

Adding references from Google scholar

Exporting items from Google Scholar (1)

1. From the Google Scholar search page, click the menu button then **Settings**

2. Scroll down to **Bibliography manager** settings

3. Select to **"Show links to import citations into"** – choose EndNote from the dropdown menu

4. **Save** preferences

Google Scholar

- My profile
- My library
- Alerts
- Metrics
- Advanced search
- Settings

Bibliography manager

○ Don't show any citation import links.
● Show links to import citations into EndNote ⇕ .

Save   Cancel
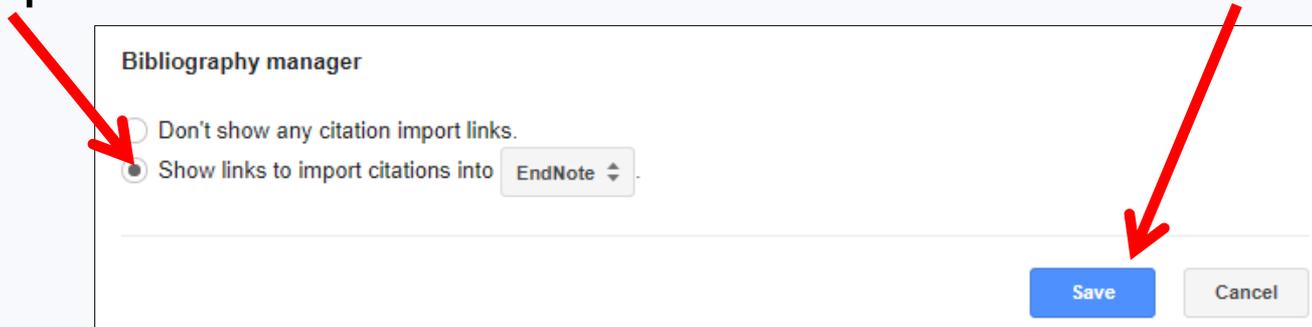
Exporting items from Google Scholar (2)

4. Search results should now offer the option to **Import to EndNote**.
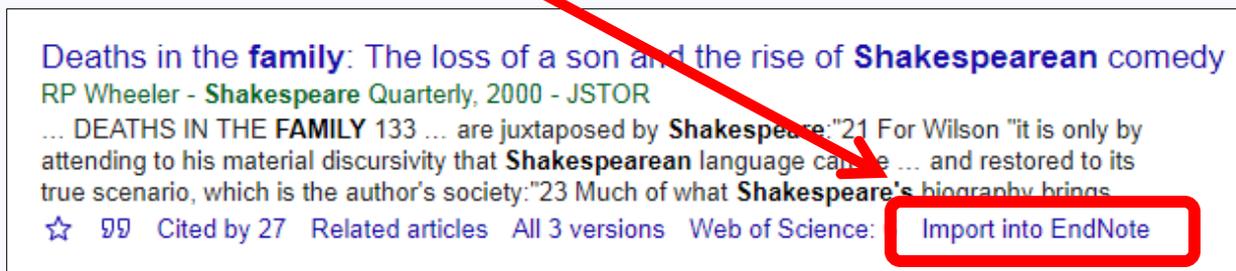
5. An ENW file is created. It may open automatically otherwise open the file manually from your browser or files. The references will be imported into your desktop EndNote library under 'Imported References'.

Exporting items from Google Scholar (3)

6. Alternatively you can select multiple records by clicking the star.
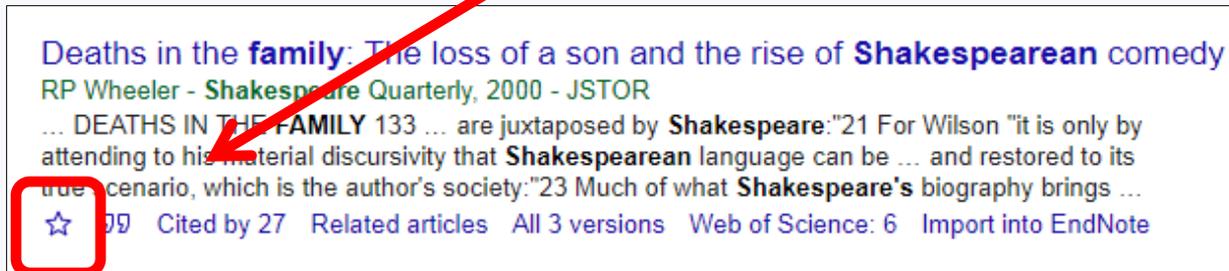
This saves the titles to 'My library', where you can export multiple references at once to EndNote.

Exporting items from Google Scholar (4)

7. This saves the titles to 'My library', where you can export multiple references at once to EndNote.

Importing records when there is no direct export option

Adding references by drag & drop PDF

Adding references by drag & drop (1)

You can drag and drop full text articles and other documents that you have saved to your computer into EndNote
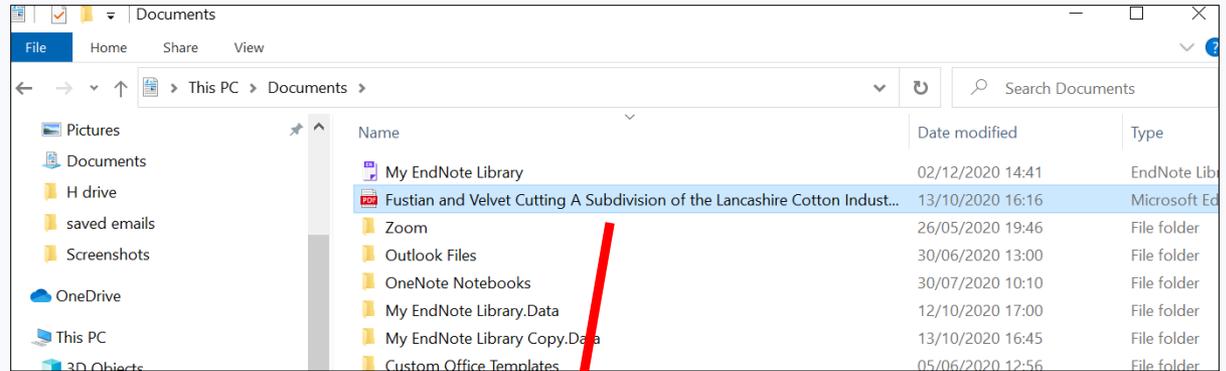
Drag & drop
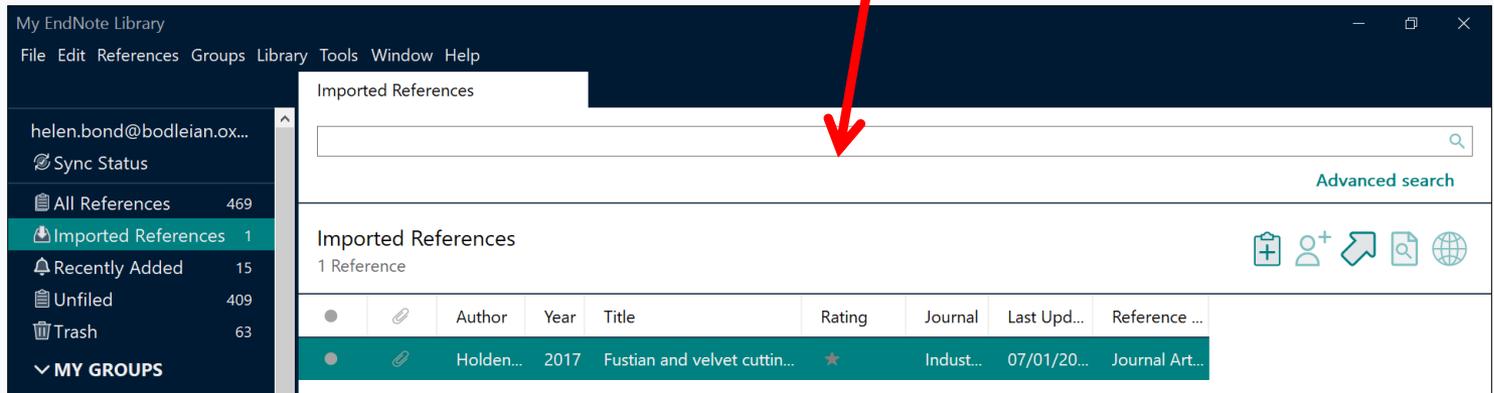
Adding references by drag & drop (2)

When you drag and drop a document, EndNote will try to find matching bibliographic information and add it to your EndNote Library. Note:

- Does not work for all documents (most likely to work for PDFs of articles)
- Bibliographic data may include errors. Check your data and make changes as necessary.

EndNote Click

EndNote Click (1)

- Free browser plugin, which:
  - speeds up the process of accessing full-text PDFs
  - allows you to export those PDFs to EndNote and generates a reference in EndNote.
- Not compatible with every database/platform.
- Requires account with EndNote Click.
- Google Chrome, Firefox and Opera.
- 100MB of free storage.

EndNote Click (2)

Adding plugin to your browser:

- Go to https://click.endnote.com/
- Depending on your browser, there will be a button that says **Add to Firefox for free** or **Add to Chrome for free**, etc.
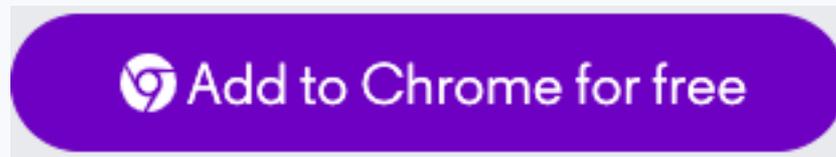
EndNote Click (3)

Navigate to a database and enter your search.

EndNote Click (4)

In the results page, the EndNote Click browser plugin will highlight PDFs that you can directly link to in order to read. Click **View PDF**.

Pancreatic beta-cells in **type** 1 and **type 2 diabetes mellitus**: different pathways to failure.

Eizirik DL, Pasquali L, Cnop M.

Nat Rev Endocrinol. 2020 Jul;16(7):349-362. doi: 10.1038/s41574-020-0355-7. Epub 2020 May 12.

PMID: 32398822   Review.

Loss of functional beta-cell mass is the key mechanism leading to the two main forms of **diabetes mellitus** - **type** 1 **diabetes mellitus** (T1DM) and **type 2 diabetes mellitus** (T2DM). ...Here, we review these new findings, f ...

View PDF

Sodium-glucose cotransporter **type 2** inhibitors for the treatment of **type 2 diabetes mellitus**.

Scheen AJ.

Nat Rev Endocrinol. 2020 Oct;16(10):556-577. doi: 10.1038/s41574-020-0392-2. Epub 2020 Aug 27.

PMID: 32855502   Review.

The management of **type 2 diabetes mellitus** (T2DM) is becoming increasingly complex. Sodium-glucose cotransporter **type 2** inhibitors (SGLT2is) are the newest antidiabetic agents for T2DM. ...

Search library

EndNote Click (5)

The PDF will open in EndNote Click and automatically save it to your 'Locker'.

To export the PDF to EndNote, click Export to EndNote.

EndNote Click (6)

The PDF file will display in the 'Imported References' area of your EndNote Library.

Adding reference manually

Adding reference manually (1)

1. Click on the plus button in the toolbar:

2. Choose a material type from the drop down menu

Adding reference manually (2)

3. Choose a material type from the drop down menu (e.g. journal article, book, thesis, web page etc.)

Note - There are several different types of 'Book'

- "Book" = standard book by one or more authors

- "Book, Section" = Chapter

- "Edited Book" = edited collection of chapters/essays by multiple authors
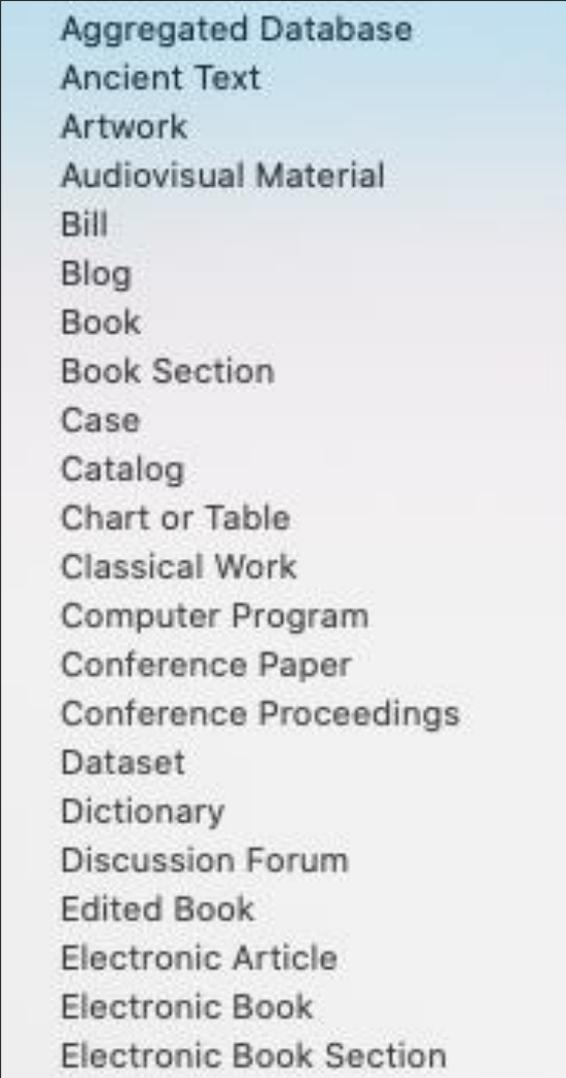
Aggregated Database
Ancient Text
Artwork
Audiovisual Material
Bill
Blog
Book
Book Section
Case
Catalog
Chart or Table
Classical Work
Computer Program
Conference Paper
Conference Proceedings
Dataset
Dictionary
Discussion Forum
Edited Book
Electronic Article
Electronic Book
Electronic Book Section

Adding reference manually (3)

5. Fill in the form. Try to fill in as many fields as you can!

6. Use the keyboard shortcut to save the reference, or close the window, which will prompt you to save.

Looking after your references

Adding notes and documents, editing, de-duplicating references, groups

Attaching documents and adding notes

To add personal notes click in the **Research Notes** field.

To attach a document, click on **attach file** in the editing pane and navigate to your saved document or drag and drop the file.

Editing references

Some records will need editing, especially from SOLO

If you do not edit your records this may lead to errors in your bibliographies and citations

Finding duplicate references (1)

Click **Library > Find Duplicates**

Finding duplicate references (2)

Decide which record to keep and click **Keep This Record**

Comparing 1 and 2 of 2 duplicates.   Skip   Cancel

Select the record to keep. The record not selected will be moved to the Trash. Select Skip to go to the next set of duplicates.

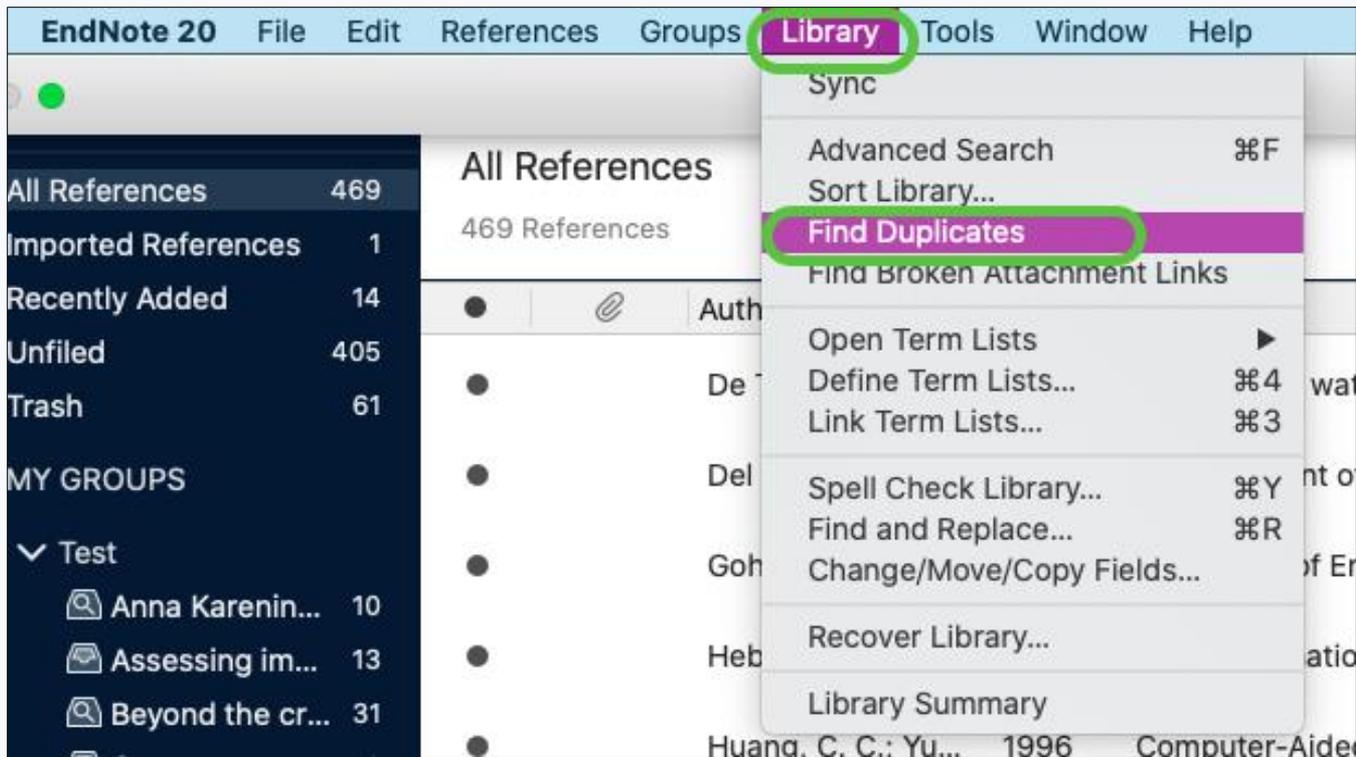| Keep this Record	Keep this Record
Dubinin, 2018 #507	Dubinin, 2018 #512
Ref Type: Journal Article	Ref Type: Journal Article
Author	**Author**
Dubinin, E.	Dubinin, E.
Fraenz, M.	Fraenz, M.
Pätzold, M.	Pätzold, M.
Halekas, J. S.	Halekas, J. S.
McFadden, J.	McFadden, J.
Connerney, J. E. P.	Connerney, J. E. P.
Jakosky, B. M.	Jakosky, B. M.
Vaisberg, O.	Vaisberg, O.
Zelenyi, L.	Zelenyi, L.
Year	**Year**
2018	2018
Title	**Title**
Solar Wind Deflection by Mass Loading in the Martian Magnetosheath Based on MAVEN Observations	Solar Wind Deflection by Mass Loading in the Martian Magnetosheath Based on MAVEN Observations
Journal	**Journal**
Geophysical Research Letters	Geophysical Research Letters
Volume	**Volume**
45	45

Added to Library: 02/12/2020   Last Updated: 02/12/2020   Added to Library: 02/12/2020   Last Updated: 02/12/2020
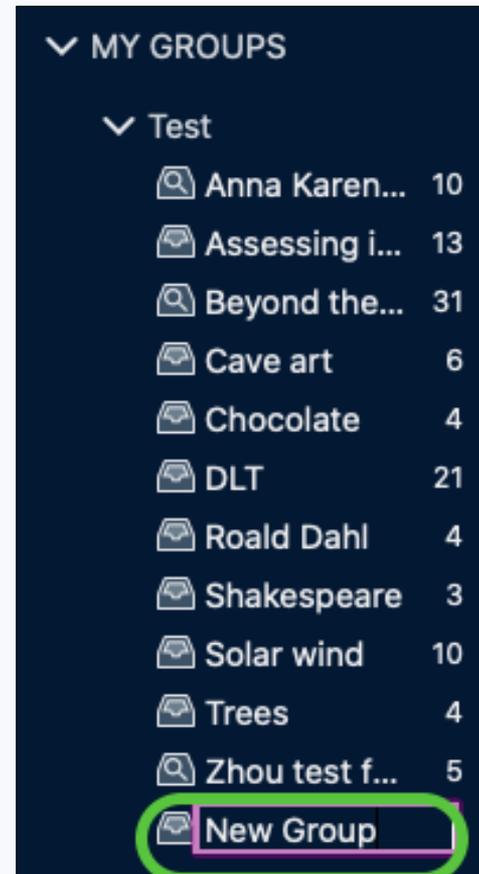
Creating groups (1)

1. Click **Groups > Create Group**
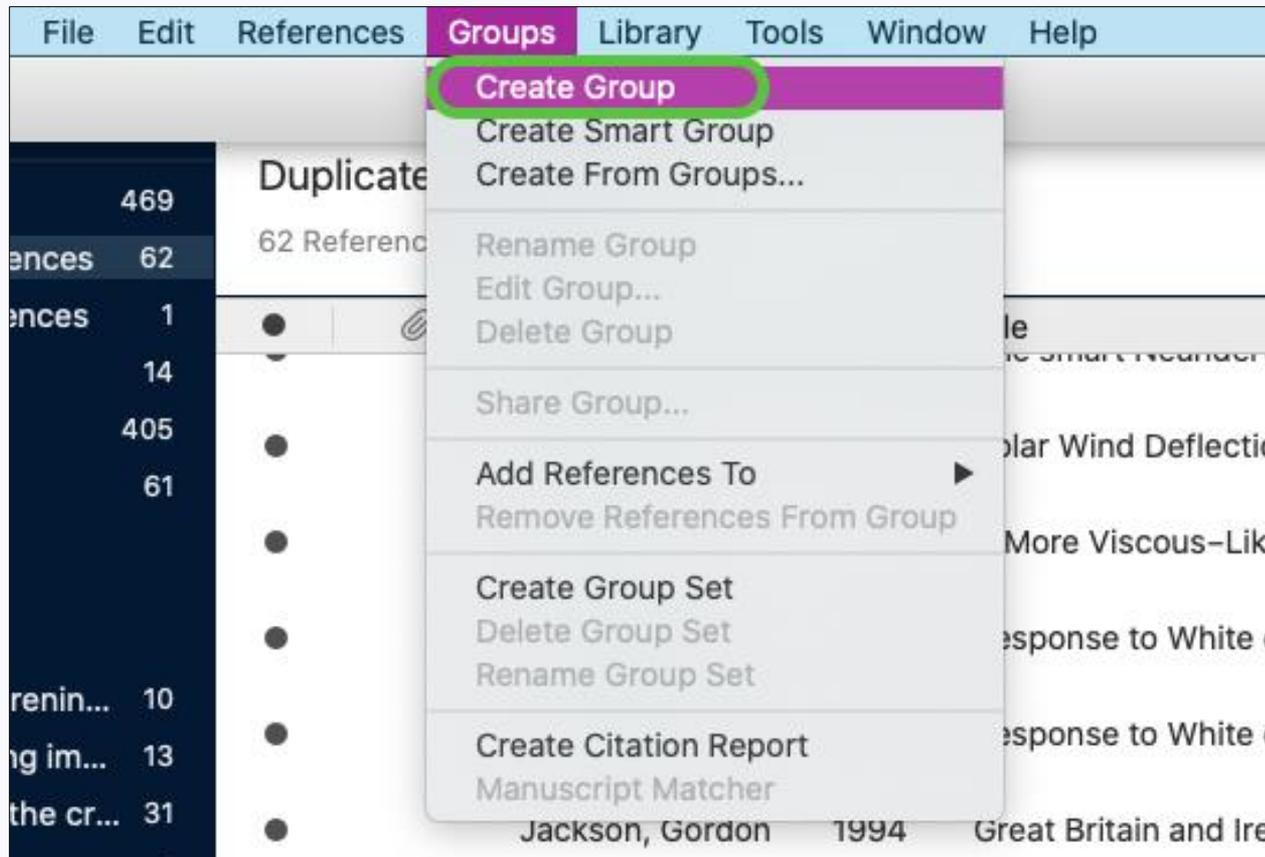
Creating Groups (2)

2. Type the name for your group
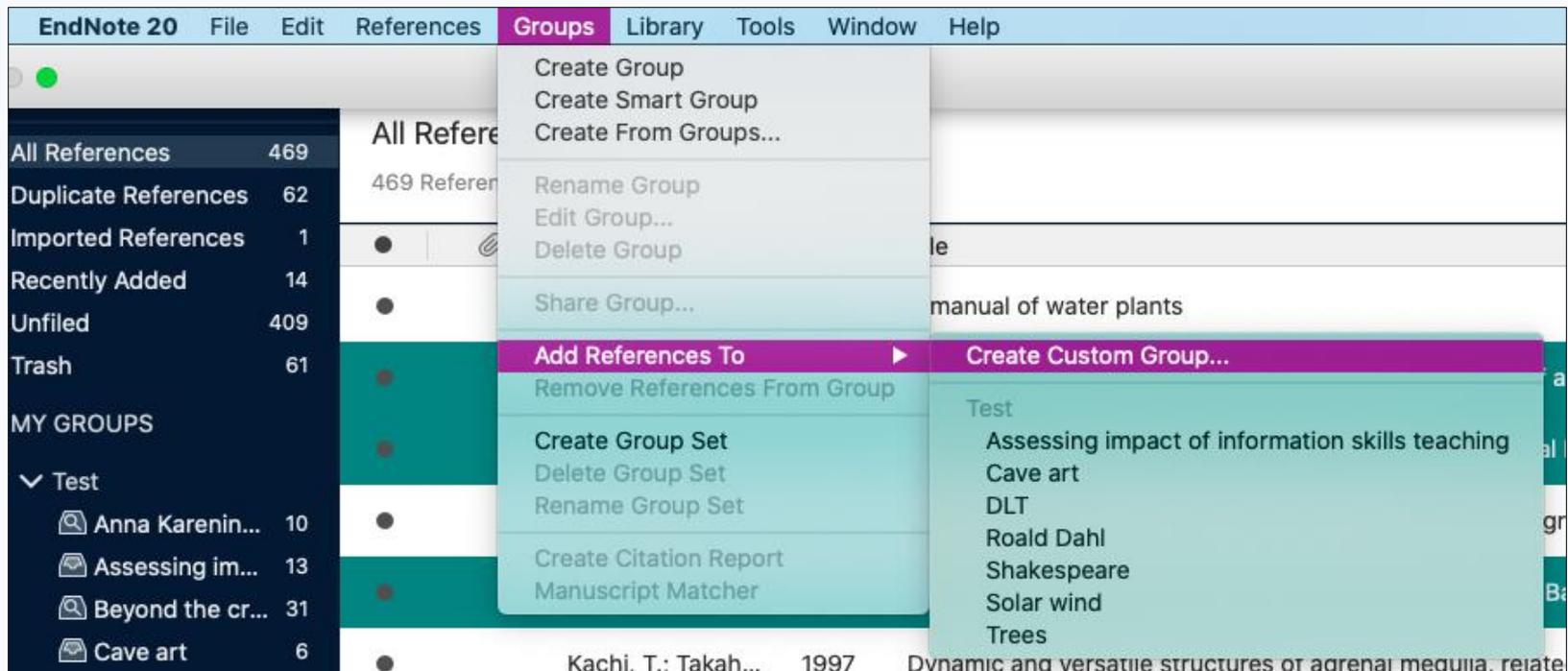
Moving references into groups (1)

Method 1:

Click **Groups > Add References To**.
Select the group you would like to move the references to.

Moving references into groups (2)

Method 2:
Select references from your library, right click and select **Add References To**.

Moving references into groups (3)

Method 3:

Simply drag and drop!

Inserting references into Word

Cite While You Write (CWYW)

- Plug-in: **Cite While You Write**.
- Available for **Word** (**Windows** and **Mac**).
- **Automatically added** to Word upon installation of EndNote.
- Appears in **ribbon** across top of Word.
- A different version of the Cite While You Write plugin is available for Word 365.

Adding a citation in Word (1)

- Choose EndNote 2025 from the ribbon.
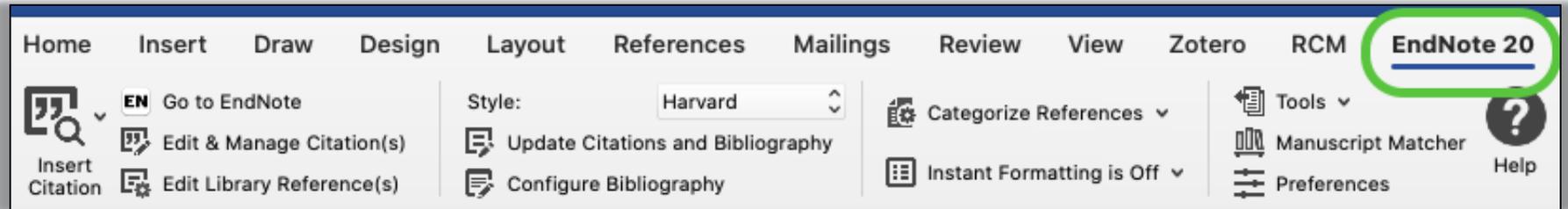
- Choose a citation style from the drop-down menu. Click **Select Another Style** to see more options.
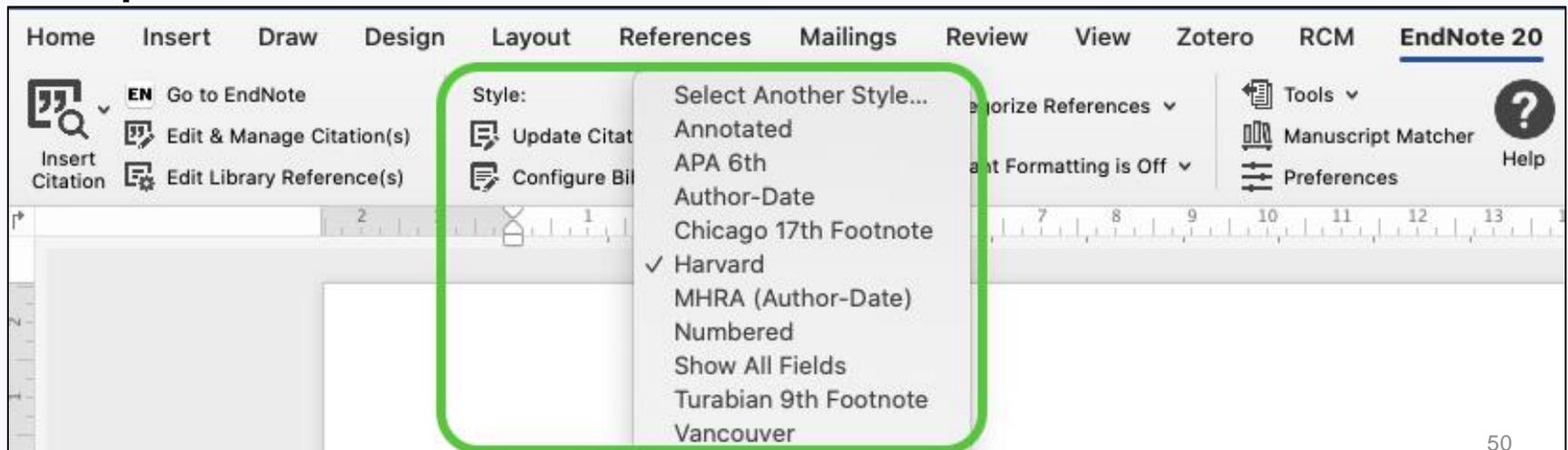
Adding a citation in Word (2)

- NB. If using a footnote style, you first need to click **References > Insert footnote**, then move over to the EndNote tab in the ribbon to insert the reference.
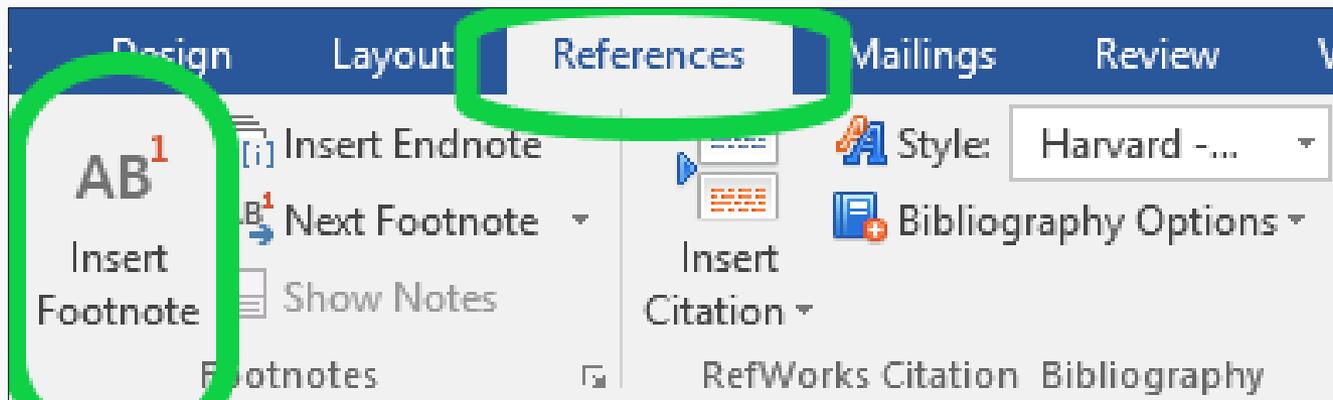
Adding a citation in Word (3)

- Place your cursor where the citation is to be inserted and click **Insert citation > Insert citation**
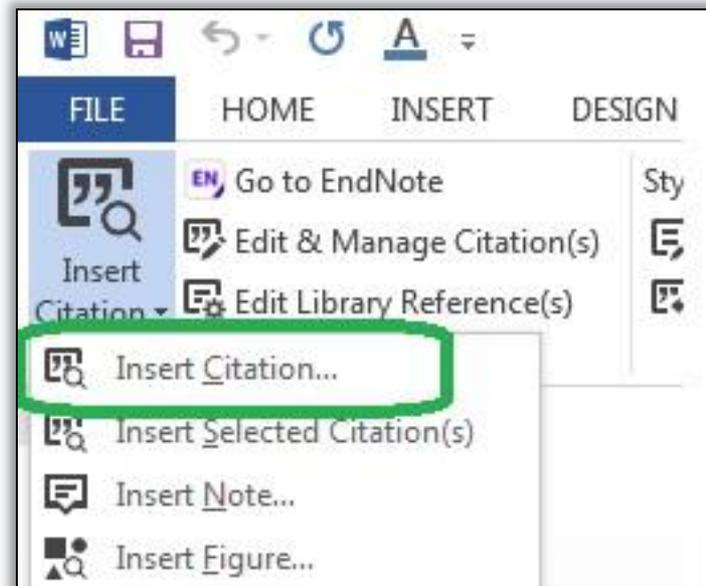
Adding a citation in Word (4)

This will open a dialogue box. Find the relevant citation(s) by submitting a search, clicking the relevant citation(s) and clicking **Insert**.

Adding a citation in Word (5)

- Alternatively, you can browse your references in EndNote, return to Word and click **Insert selected citation(s)**.

Adding page numbers to a citation (1)

- Click the reference you would like to add page numbers to, so it is highlighted grey.

"Around 1580, a distinct group of plays—domestic tragedies as they came to be known—began to appear in the new professional playhouses of London" (Benson, 2012)

- Click **Edit & manage citations**.
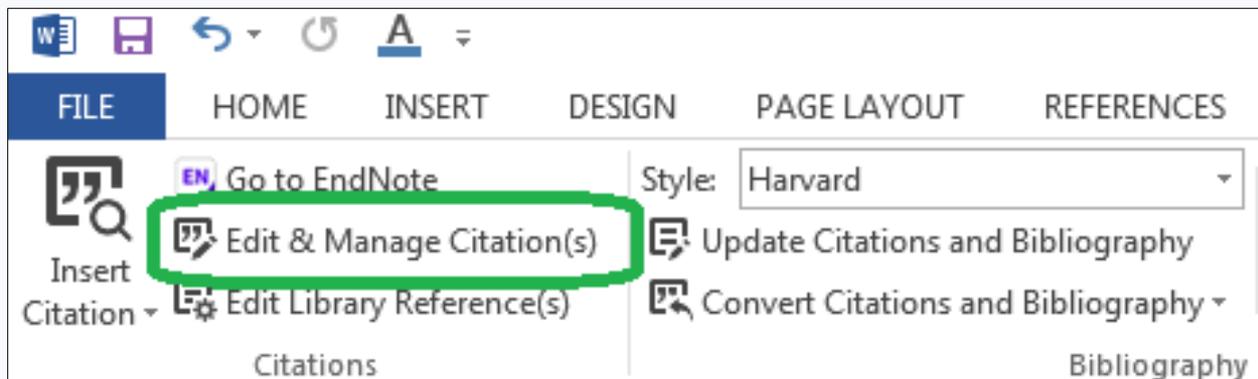
Adding page numbers to a citation (2)

- Add the page number(s) in the **Pages** box.
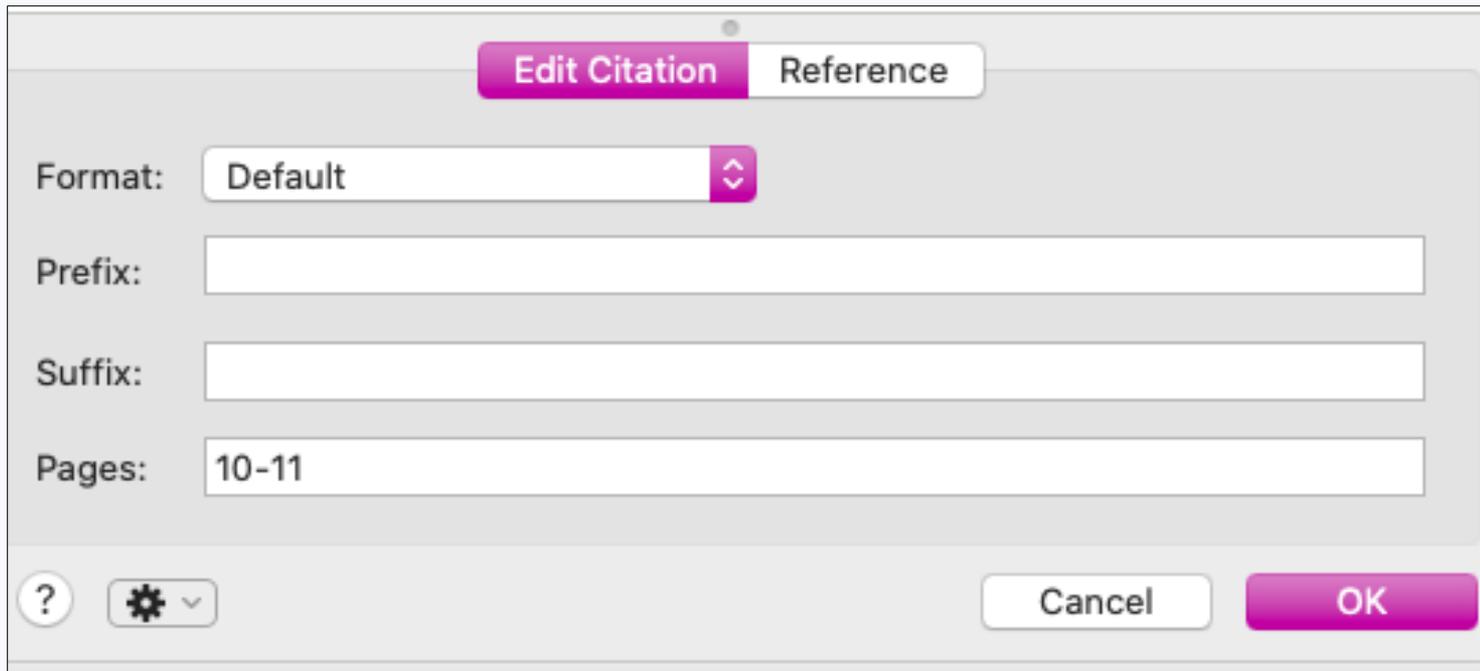
Adding page numbers to a citation (3)

- For some citation styles, you may need to add the page numbers to the suffix field.
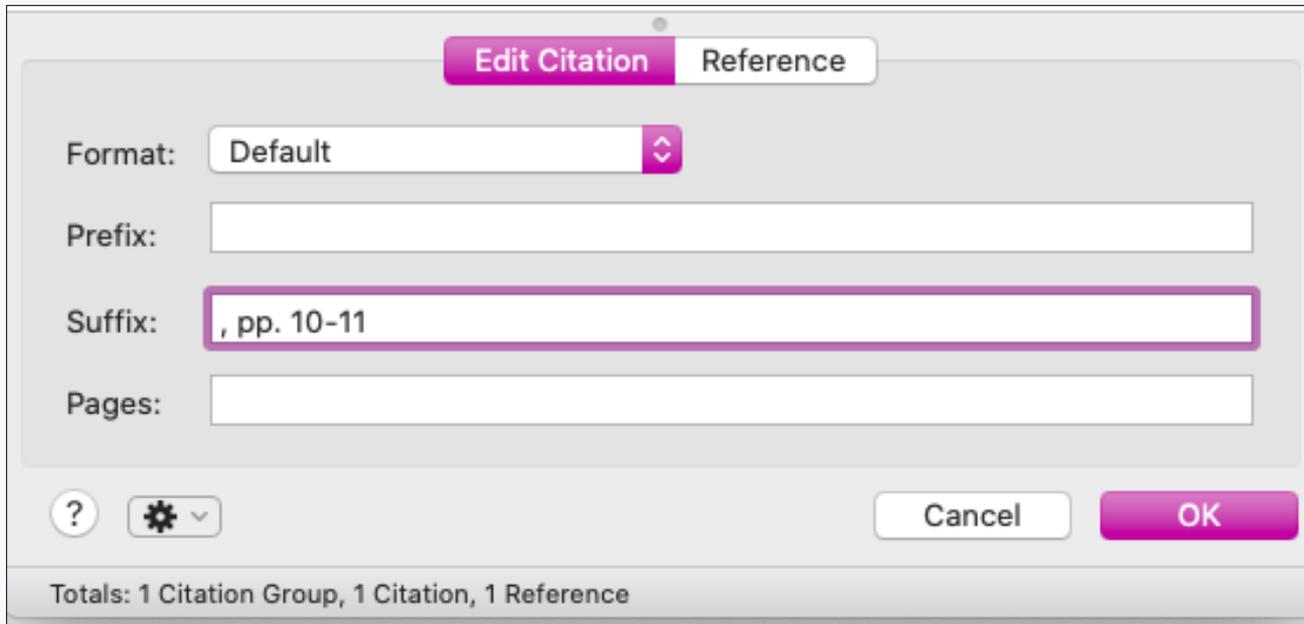
Creating bibliographies in EndNote

Bibliography (1)

- You may also like to create a reference list of everything you read in addition to a bibliography of cited items.

- In EndNote, select your citation style under **Tools > Output Styles**.
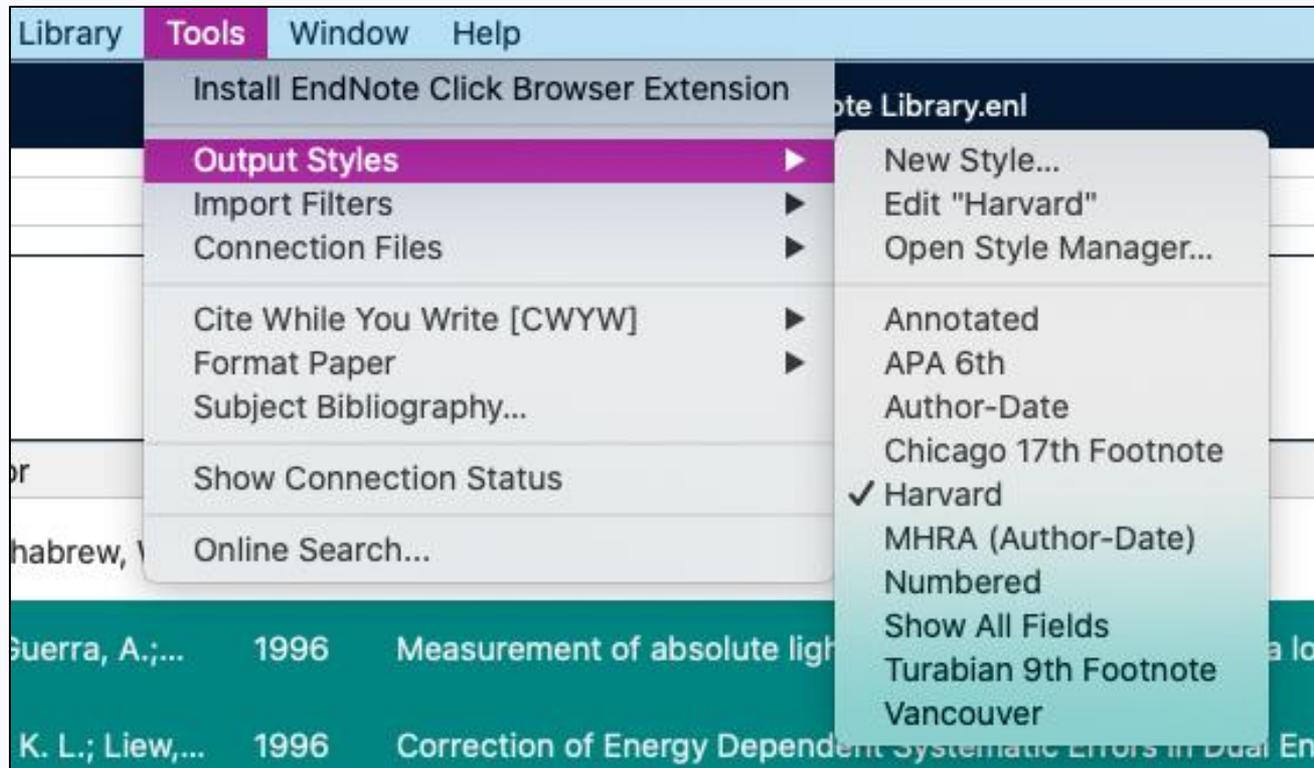
Bibliography (2)

- Select the references you would like to copy in EndNote. Click **References > Copy Formatted Reference**. Open Word and paste the references into your document.
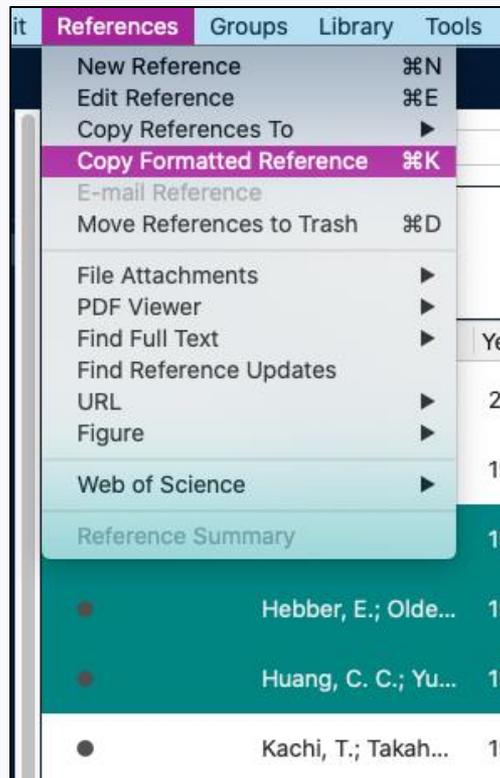
Organising your bibliography (1)

- You may like to organise the bibliography differently, e.g., primary and secondary resources.

In Word, click **Categorize References > Configure Categories**

Organising your bibliography (2)

A pop up box will appear. Drag and drop references into the 'Primary' and 'Secondary' headings already available.
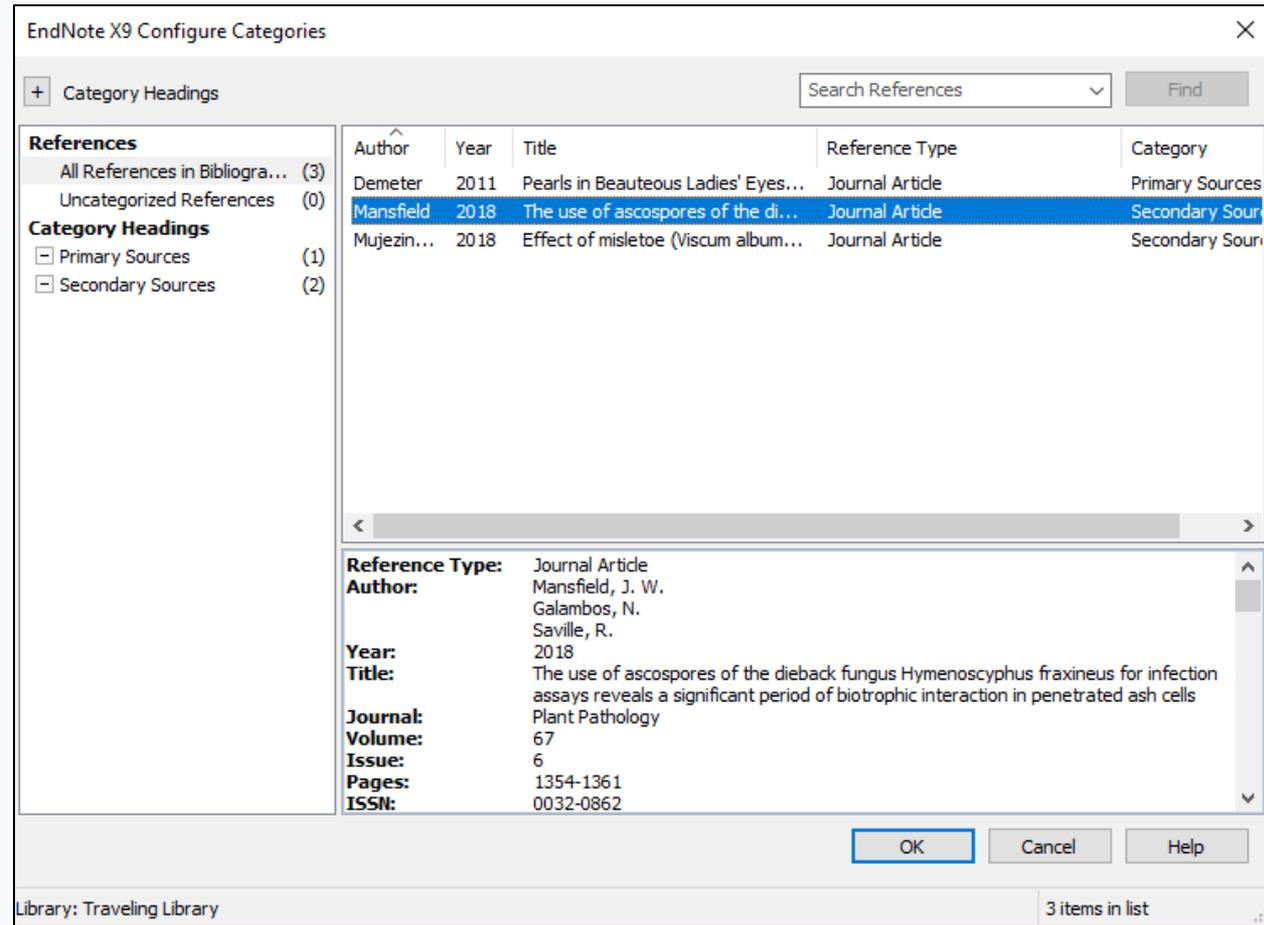
Organising your bibliography (3)

Your bibliography will now be organised by category.

The Red and the Black was a fantastic book written by Stendhal [1]

Primary

Agatonovic-Kustrin, S., E. Kustrin, and D. W. Morton. "Essential Oils and Functional Herbs for Healthy Aging." *Neural Regeneration Research* 14, no. 3 (Mar 2019): 441-45. https://doi.org/10.4103/1673-5374.245467.

Secondary

Beyle, Marie Henri. *Vie De Napoléon, Par De Stendhal*. 2e éd. ed. Paris, 1877.
Stendhal. "Promenades Dans Rome." In *Vie De Napoléon*, edited by Marie Henri Beyle. Paris, 1877.

Word 365 and CWYW

- There is a different version of CWYW for Word 365.

1. Open Word 365.
2. From the 'Home' tab find the add-ins icon and click this.
3. Search for 'EndNote'
4. Click the EndNote CWYW add-in and follow the onscreen instructions to install.
5. You must have an EndNote web account set up.
Further info: EndNote: Word Online CWYW
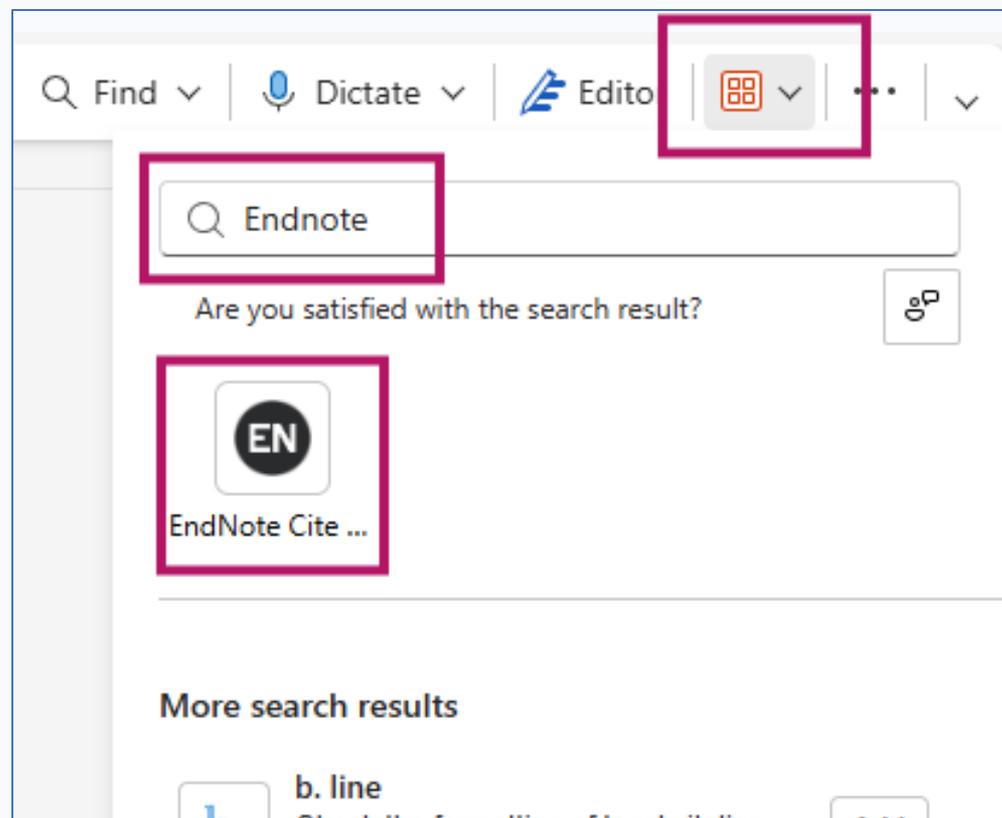
Saving a copy of your library

It is a good idea to save a copy of your library in case anything happens to your computer.

Click **File > Save a Copy…**
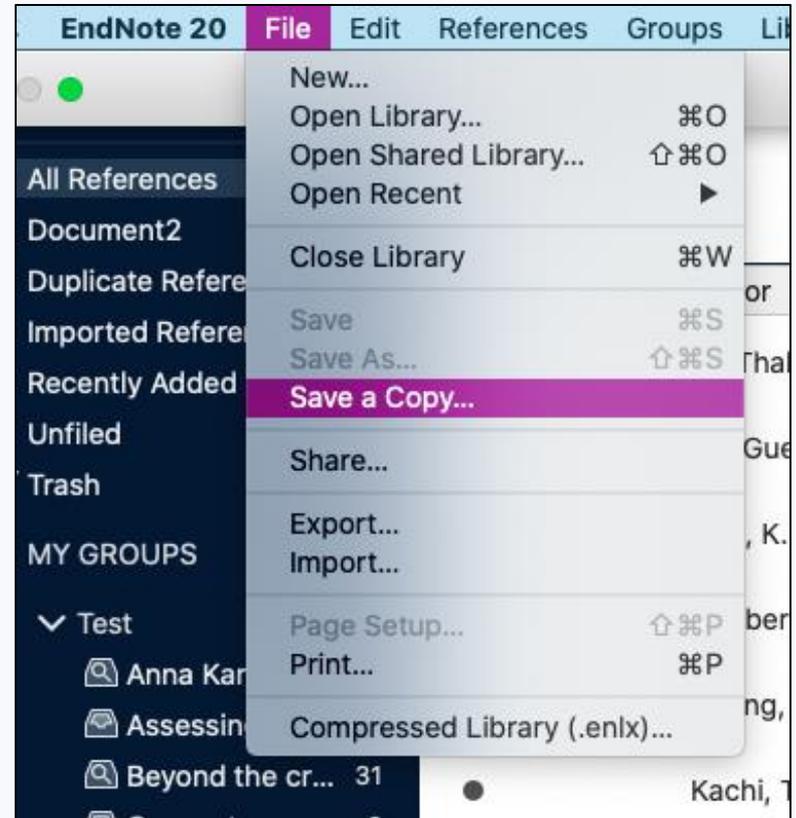
Keeping EndNote up to date

It is important to keep EndNote up to date.
Fixes for problems are released.

Click **Help > Check for Updates**
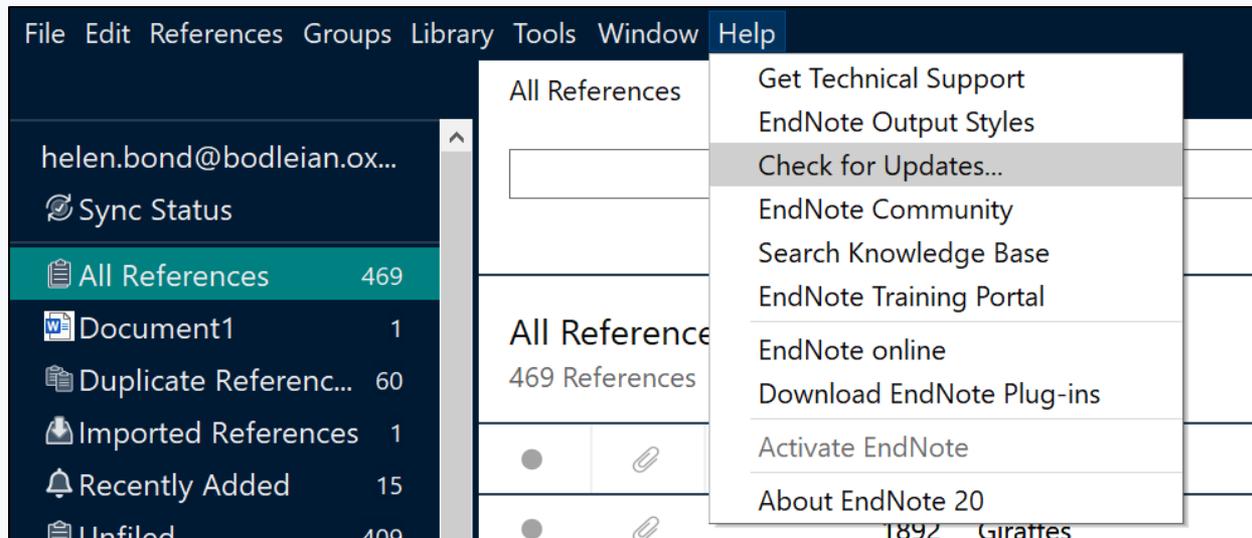
What is AI (Artificial Intelligence)?

AI tools can generate text, images, sounds etc. based on prompts provided by users.

Can also help with other aspects of academic work such as summarising texts, paraphrasing and locating published research.

Be critical – AI tools can be inaccurate and biased.

It is important to acknowledge the use of AI tools by referencing them.

Guidance on using AI at Oxford is here - [Generative AI at Oxford | University of Oxford](#)

EndNote and AI

- AI functions in EndNote 2025.
- There is an AI summary tool for PDF files.
- You can turn on and off the 'Research Assistant'
- Be cautious – AI can hallucinate and generate inaccurate information.

Referencing AI tools or AI generated content
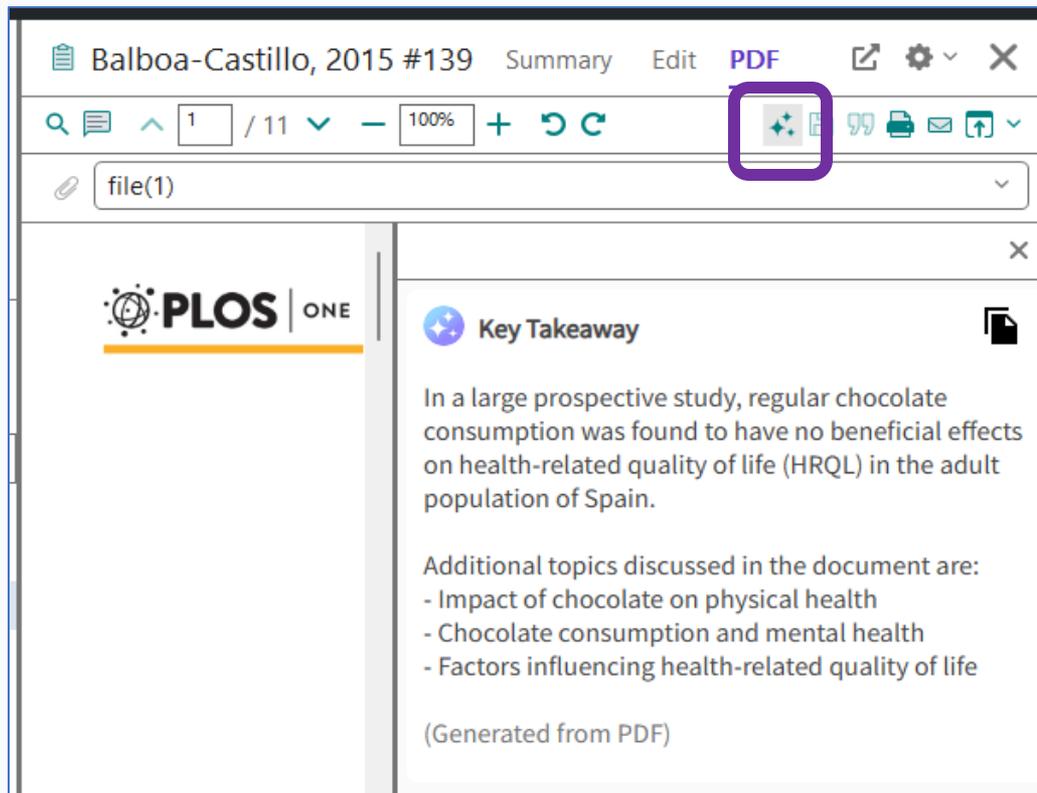
- Many referencing styles still to offer guidance!
- No specific 'AI' source type in EndNote.
- More guidance here - https://libguides.bodleian.ox.ac.uk/using-ai-to-support-academic-work/referencing

Template or Resource type for referencing AI tools	Template or Resource type for referencing AI generated content
Computer Program	• Use closest matching content type. • Use 'Generic'

In-text citation

The AI-generated flower (Shutterstock AI, 2023) …

Reference list

Shutterstock AI (2023) *Photo of pond with lotus flower* [Digital art]. Available at: https://www.shutterstock.com/image-generated/photo-pond-lotus-flower-2252080005 (Accessed: 31 March 2023).

Help

- Use **Help** from the EndNote menu or F1

- Official EndNote tutorials
  http://clarivate.libguides.com/endnote_training/home

- Local help is available by emailing reference-management@bodleian.ox.ac.uk

Questions