#### Introduction to EndNote

Ollie Bridle and Hannah Medworth

#### 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 - <u>https://help.it.ox.ac.uk/how-to-get-software</u>

## 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 21 to use EndNote Web.

Register at: <a href="https://web.endnote.com/login">https://web.endnote.com/login</a>

Do not recommend using EndNote Web on its own.

#### EndNote 2025

- Recently released and not yet available through IT services.
- New features include -
  - $\circ$  Interface improvements.
  - Al function to summarise PDFs.
  - o Ability to cite directly from PDF files.
- What you learn about EndNote 21 today will be applicable to EndNote 2025.
- More information here <a href="https://proquest.libguides.com/endnote">https://proquest.libguides.com/endnote</a>

## 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)**



#### **Online Search (2)**

helen.bond@bodleian.ox Ø Sync Status	All Fields And   All Fields	Contains     obesity       Contains     child*		
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<ul><li></li></ul>	PubMed (NLM)			+
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#### **Online Search (4)**

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

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	Zheng, H.; Xu, Z 2021 Long-term exposure to ambient air pollution and obesity in sc	Envi Volume	e
	De Groot, C. J.; 2021 Clinical management of patients with genetic obesity during C	End Part/Supplemen	t

#### **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.

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		•	Kansra, A.	R.; La 202	0 Childhood and A	dolescent Obesity: A Review	Front Pediatr	01/02/2021	Journal Article
									12

## 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'

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Physical Items (5	Agee, L. (Jim) 2007   Oxford : Chandos ( xvII, 132 p. : III. : 24 cm Find & Request »	

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.

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## 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.



### **Exporting items from SOLO (4)**

	Open Always open files of this type	
	Show in folder	
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#### 9. The RIS file will automatically be imported into your EndNote library under 'Imported References'.

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

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## Adding references from Google scholar

#### Exporting items from Google Scholar (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

Bibliography manager	
Don't show any citation import links.	
Show links to import citations into     EndNote	
	V
	Save Cancel

4. Save preferences

#### **Exporting items from Google Scholar (2)**

4. Search results should now offer the option to **Import to EndNote**.

Deaths in the **family**: The loss of a son and the rise of **Shakespearean** comedy RP Wheeler - **Shakespeare** Quarterly, 2000 - JSTOR ... DEATHS IN THE **FAMILY** 133 ... are juxtaposed by **Shakespeare**:"21 For Wilson "it is only by attending to his material discursivity that **Shakespearean** language can be ... and restored to its true scenario, which is the author's society:"23 Much of what **Shakespeare's** biography brings 299 Cited by 27 Related articles All 3 versions Web of Science: Import into 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.

Deaths in the **family**: The loss of a son and the rise of **Shakespearean** comedy RP Wheeler - **Shakespeare** Quarterly, 2000 - JSTOR ... DEATHS IN THE **FAMILY** 133 ... are juxtaposed by **Shakespeare**:"21 For Wilson "it is only by attending to his material discursivity that **Shakespearean** language can be ... and restored to its true cenario, which is the author's society:"23 Much of what **Shakespeare's** biography brings ... 29 Cited by 27 Related articles All 3 versions Web of Science: 6 Import into EndNote

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.



## Have a go!

www.bodleian.ox.ac.uk/ask/workshops/reference-managementworkshop-handouts

- Online search
- SOLO
- Google Scholar
- Databases:
  - Humanities
  - Medical Sciences and MPLS (Mathematical, Physical and Life Sciences)
  - Social Sciences
  - English literature, modern languages and literature, linguistics

## 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

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#### 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)

- Previously called Kopernio.
- 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 <u>kopernio.com</u>
- 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. Sodiumglucose 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.

	EndNote 20 - My EndNote Library.enl		
helen.bond@bodleian.ox Ø Sync Status	Q Search Advanced Search	Eizirik, 2020 #562 B I ∪ X <sup>1</sup> X	
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> MY GROUPS 60 ~ FIND FULL TEXT		Title	2020 Pancreatic β-cells in type 1 and type 2 diabetes mellitus: different pathways to failure
<ul><li>✓ GROUPS SHARED BY</li><li>✓ ONLINE SEARCH</li></ul>		Journal	Nature Reviews Endocrinology

## Adding reference manually
## Adding reference manually (1)

#### 1. Click on the plus button in the toolbar:



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B / U X <sup>1</sup> X <sub>1</sub>	۹	-	Save	
Reference Type	Journal Article		×	] Î
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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.





#### Have a go!

#### www.bodleian.ox.ac.uk/ask/workshops/referencemanagement-workshop-handouts

- Drag and drop PDFs
- Manually adding a reference
- EndNote Click

# 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.

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#### **Editing references**





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

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#### Finding duplicate references (2)

# Decide which record to keep and click Keep This Record

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Author Dubinin, E. Fraenz, M. Pätzold, M. Halekas, J. S. McFadden, J. Connerney, J. E. P. Jakosky, B. M. Vaisberg, O. Zelenyi, L.		Author Dubinin, E. Fraenz, M. Pätzold, M. Halekas, J. S. McFadden, J. Connerney, J. E. P. Jakosky, B. M. Vaisberg, O. Zelenyi, L.			
Year         2018 <u>Title</u> Solar Wind Deflection by Mass Loading in the Martian Magnetosheath Based on MAVEN Observations         Journal         Geophysical Research Letters <u>Volume</u> 45         Added to Library: 02/12/2020       Last Updated: 02/12/2020		Year         2018 <u>Title</u> Solar Wind Deflection by Mass Loading in the Mar         Based on MAVEN Observations         Journal         Geophysical Research Letters <u>Volume</u> 45         Added to Library: 02/12/2020         Last Updated: 02/12/2020		sheath	

## Creating groups (1)

#### 1. Click Groups > Create Group

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## **Creating Groups (2)**

# 2. Type the name for your group

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47

## Moving references into groups (1)

#### Method 1:

#### Click Groups > Add References To.

Select the group you would like to move the references to.

EndNote 20 File	Edit	References	Groups	Library	Tools	Window	Help
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## Moving references into groups (2)

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

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# Moving references into groups (3)

Method 3:

Simply drag and drop!

## Have a go!

www.bodleian.ox.ac.uk/ask/workshops/reference-managementworkshop-handouts

- Groups
- Adding documents and notes
- Editing references
- Duplicates

# Inserting references into Word

## **Cite While You Write**

- 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.



## Adding a citation in Word (1)

#### Choose EndNote 20 from the ribbon.



 Choose a citation style from the drop-down menu. Click Select Another Style to see more options.

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*		Chicago 17th Footnote ✓ Harvard MHRA (Author-Date) Numbered Show All Fields Turabian 9th Footnote Vancouver		54

## 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.

Author	<ul> <li>Year</li> </ul>	Title
	2012	Human evolution: hobbit small, but not stunted
Angell	2015	Using quantitative research methods to determine t
Belanger	2012	Developing a collaborative faculty-librarian informat
Blank	2017	A novel assessment tool for quantitative evaluation
Boh Podgornik	2016	Development, testing, and validation of an informati
British	2011	Information handling in collaborative research : an e
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Doyle	1994	Information literacy in an information society : a con
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Erlinger	2018	Outcomes assessment in undergraduate Information

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Year: 2012		
Title: Human evolution: hobbit small, but not stunted		
Journal: Nature		
Volume: 482		
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## Adding a citation in Word (5)

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

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V MY GROUPS		•		Goh, K. L.; Liew,	1996	Correction of Energy Dependent Systematic Errors in Dual Ene	Medical imaging conference	08/11/2019	Conference P

### 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.

		Edit Citation	Reference	]	
Format:	Default	0			
Prefix:					
Suffix:					
Pages:	10-11				
? 🌸				Cancel	ОК

#### Adding page numbers to a citation (3)

• For some citation styles, you may need to add the page numbers to the suffix field.

		Edit Citation	Reference	)	
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Suffix:	, pp. 10-11				
Pages:					
?	2			Cancel	ОК
Totals: 1 Citation Group, 1 Citation, 1 Reference					

# 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.

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K. L.; Liew	<i>ı,</i> 1996	Correction of Energy	Depend	Vancouver ent systematic entristin oual En

## **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.

EndNote X9 Configure Categori	es				×
+ Category Headings				Search References 🗸 🗸	Find
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	<ul> <li>Reference Author:</li> <li>Year: Title:</li> <li>Journal: Volume:</li> <li>Issue: Pages: ISSN:</li> </ul>	• Туре:		back fungus Hymenoscyphus fraxineus d of biotrophic interaction in penetrated OK Cancel	
Library: Traveling Library				3 items ir	n list

#### **Organising your bibliography (3)**

#### Your bibliography will now be organised by category.

The Red and the Black was a fantastic book written by Stendhal <sup>1</sup>

#### 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.

## 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...

EndNote 20	File	Edit	References	Groups	Lil
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## 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)?

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Al 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.



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

#### 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: <u>https://www.shutterstock.com/image-generated/photo-pond-lotus-flower-</u> 2252080005 (Accessed: 31 March 2023).

#### EndNote and AI

- AI functions in EndNote 2025.
- How to reference AI tools or the things they create?
- Many referencing styles still to offer guidance!
- No specific 'AI' source type in EndNote.

Integration with other AI tools?	Template or Resource type for referencing AI tools	Template or Resource type for referencing AI generated content
<ul><li>EndNote Click</li><li>ResearchRabbit</li></ul>	Computer Program	<ul> <li>Use closest matching content type.</li> <li>Use 'Generic'</li> </ul>



- Use **Help** from the EndNote menu or F1
- Official EndNote tutorials <u>http://clarivate.libguides.com/endnote\_training/home</u>

 Local help is available by emailing <u>reference-management@bodleian.ox.ac.uk</u>

## Questions



## Have a go!

www.bodleian.ox.ac.uk/ask/workshops/reference-managementworkshop-handouts

- 'Cite While You Write' Word plugin
  - In-text citations
  - Footnotes
- Page numbers
- Creating a bibliography