

# EndNote Desktop Instructions

This guide will take you through the various aspects of using EndNote Desktop.

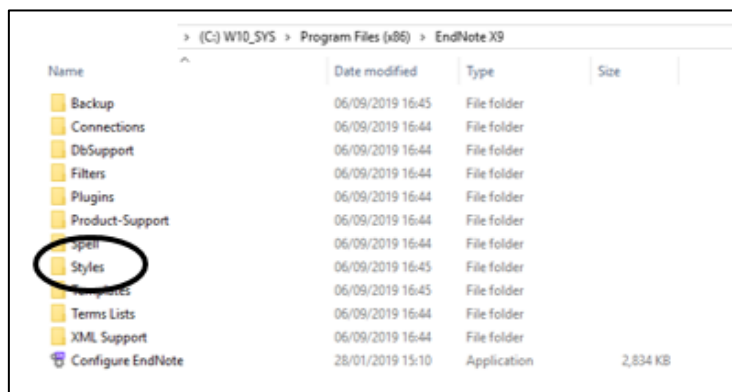
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## Downloading EndNote Desktop

EndNote Desktop is now available to use off campus. You will first need to download the software to your PC or Mac. Staff and Students can download a copy from IT's Software Download Centre - <https://www.mmu.ac.uk/isds/support/apps/> Here you will find the software and the relevant product key.

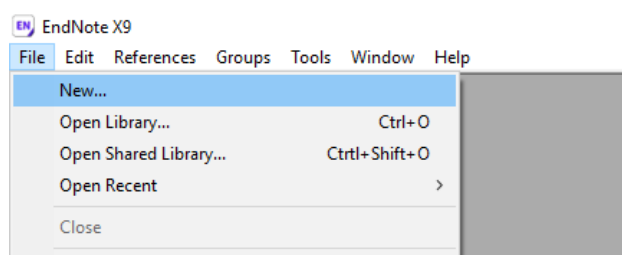
The MMU Harvard referencing style is not included with the initial download of the software, but can be supplied by the library, simply email [library@mmu.ac.uk](mailto:library@mmu.ac.uk) to obtain this style. Once you have the style file, it needs to be saved in the styles folder within the EndNote software. Locate the Program files on your hard drive and add the file to the folder called styles.



## Creating a Library

To start using EndNote Desktop you first need to create a file called a Library to store your references. It can include lots of different reference types i.e. books, journal articles, conference proceedings, etc.

Open the EndNote software. Then choose File and New.



A default file called My EndNote Library will be created. You can change the name of your library if you prefer. Then click Save.

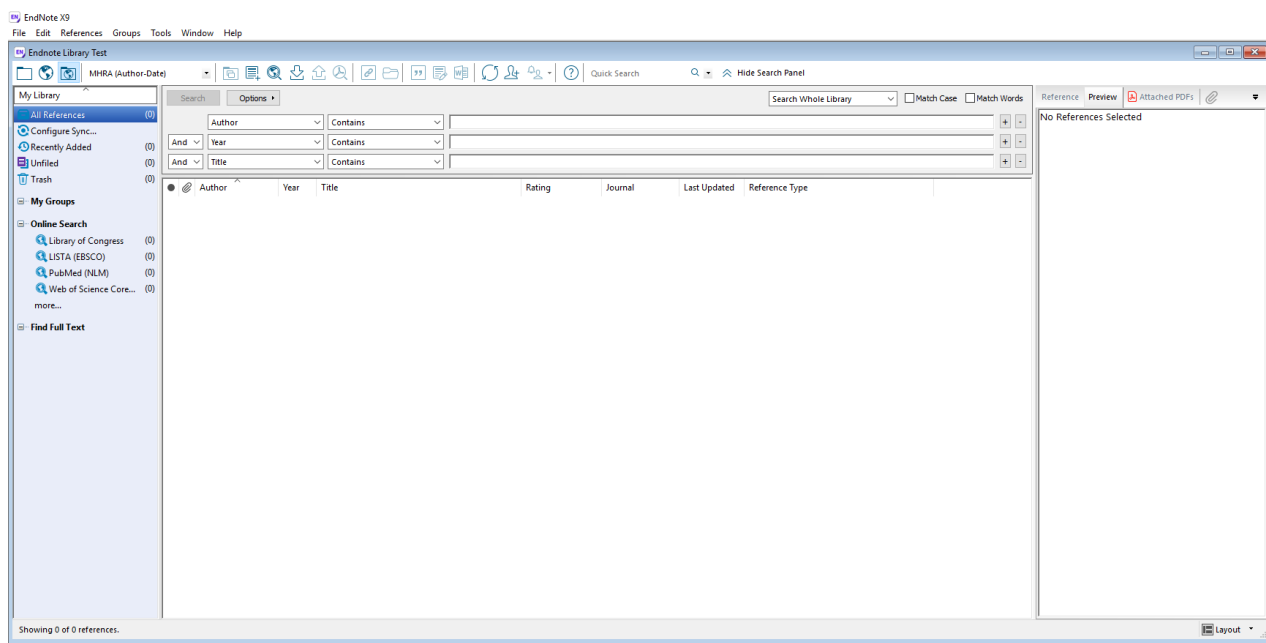
EndNote libraries are made up of two parts .enl file and a Data folder. Ensure both parts are kept in the same location, as both are needed for EndNote to function correctly.

Please note your EndNote library needs to be saved to a location such as a hard drive. EndNote libraries should never be stored in cloud syncing folders such as Drop Box, One Drive, iCloud, etc as syncing folder corrupts over time.

## The Reference Library

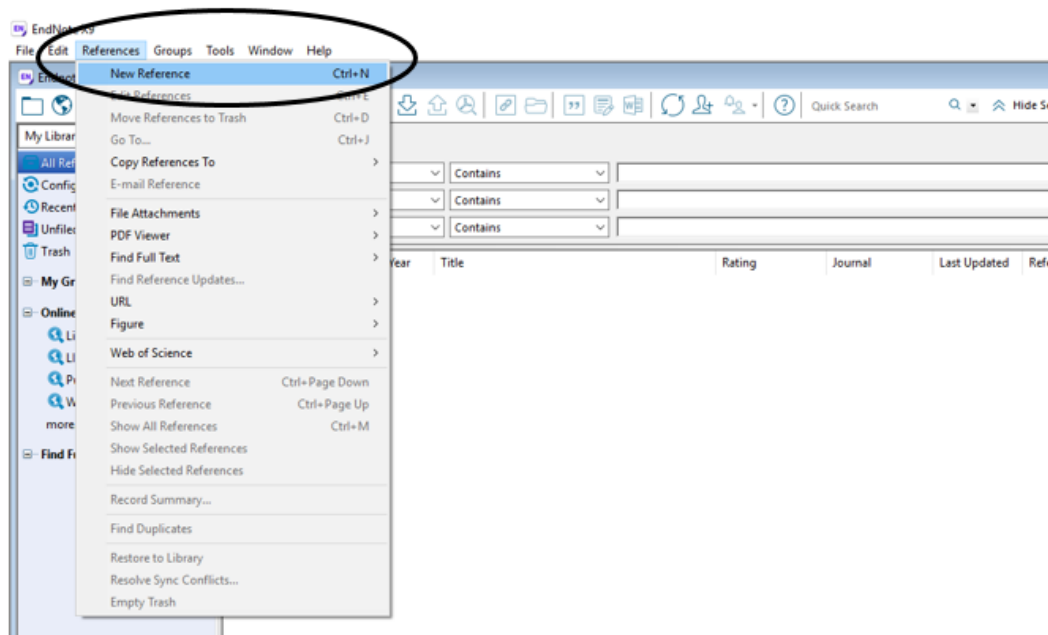
The file that holds your references is called a library. It can include lots of different reference types i.e. books, journal articles, conference proceedings, etc.

References are displayed in a list within the central panel and can be previewed on the right hand side of the screen.

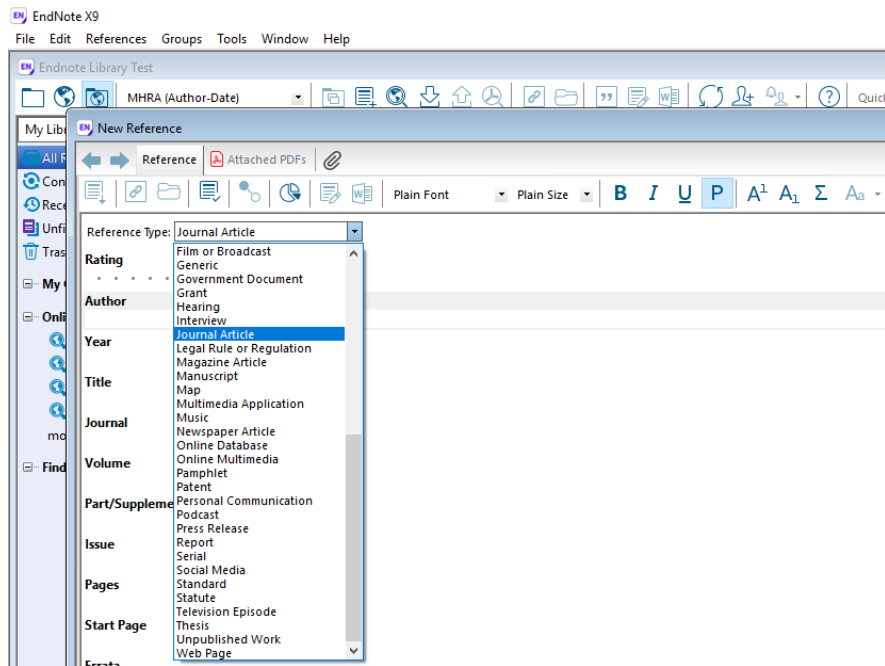


## Manually adding references

To manually add a new reference, select References and then choose New Reference.



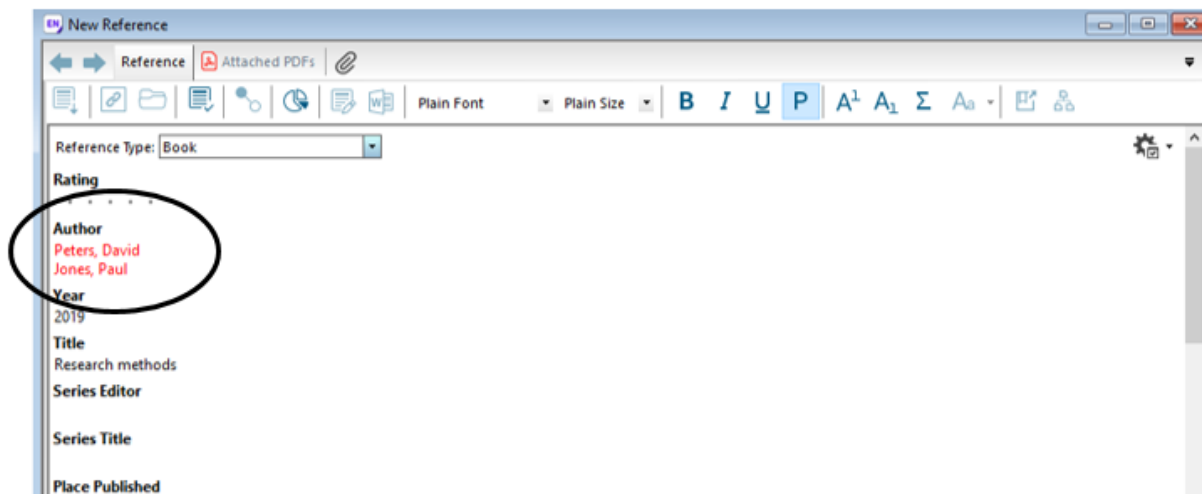
A new window will appear. First select the type of reference you require from the drop-down menu. Reference types are listed alphabetically, scroll up or down to locate the one you need.



The fields will change to reflect the reference type, simply click in each relevant field and enter the details of the reference.

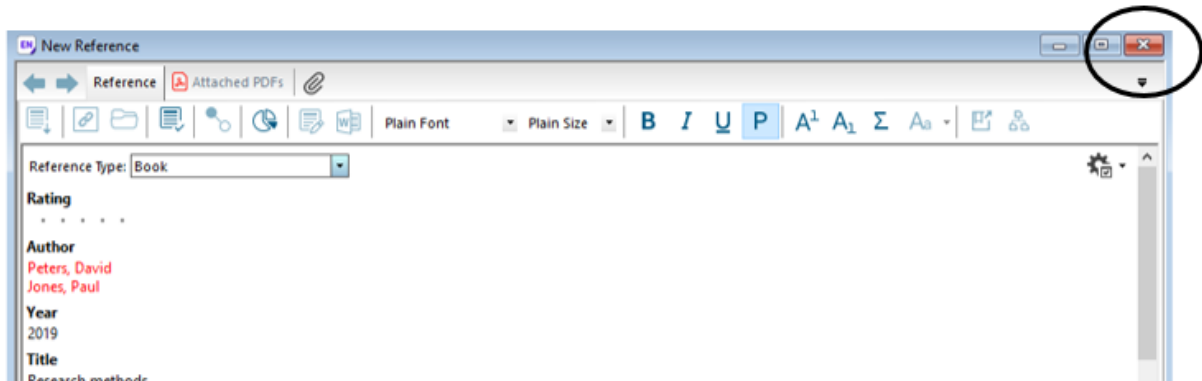
### Tips for entering authors

When entering the names of authors or editors always use the following order, Last Name, First Name i.e. Peters, David. If the reference includes multiple authors/editors, each must be entered on a separate line.



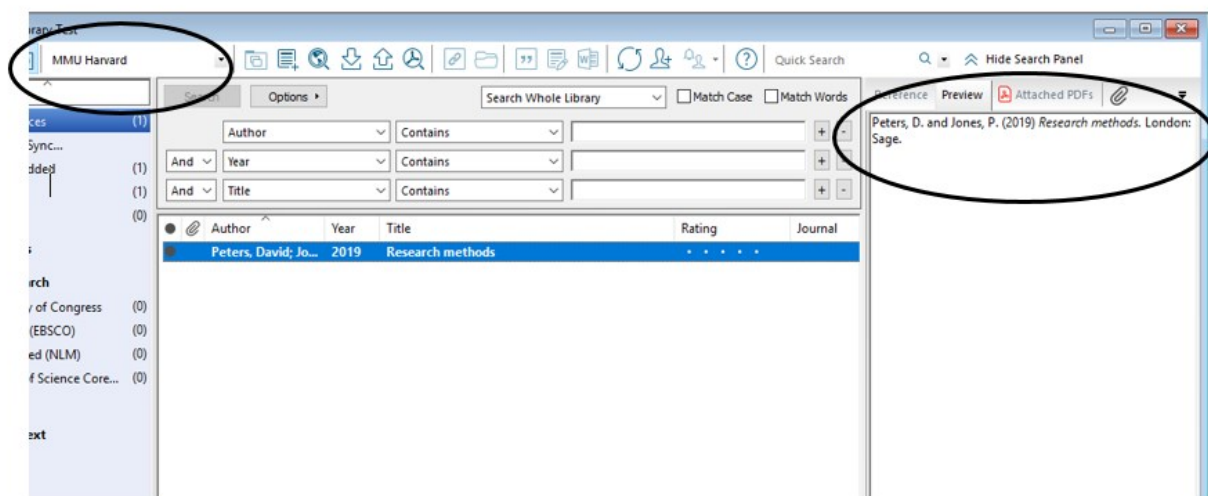
If the reference includes the name of the organisation as the author you will need to insert a comma after the name so that it will appear correctly in your reference list i.e. Manchester Metropolitan University,

When you have entered all the relevant details, click on the red cross on the reference window. This will add the reference to your library.



## Preview your references

To see how your reference might appear in your chosen referencing style, it can be previewed in EndNote. Simply click to highlight the reference you want to check. On the right hand side of the screen choose Preview. You also need to select your referencing style by choosing the name i.e. MMU Harvard from the drop-down menu located above the list of references.

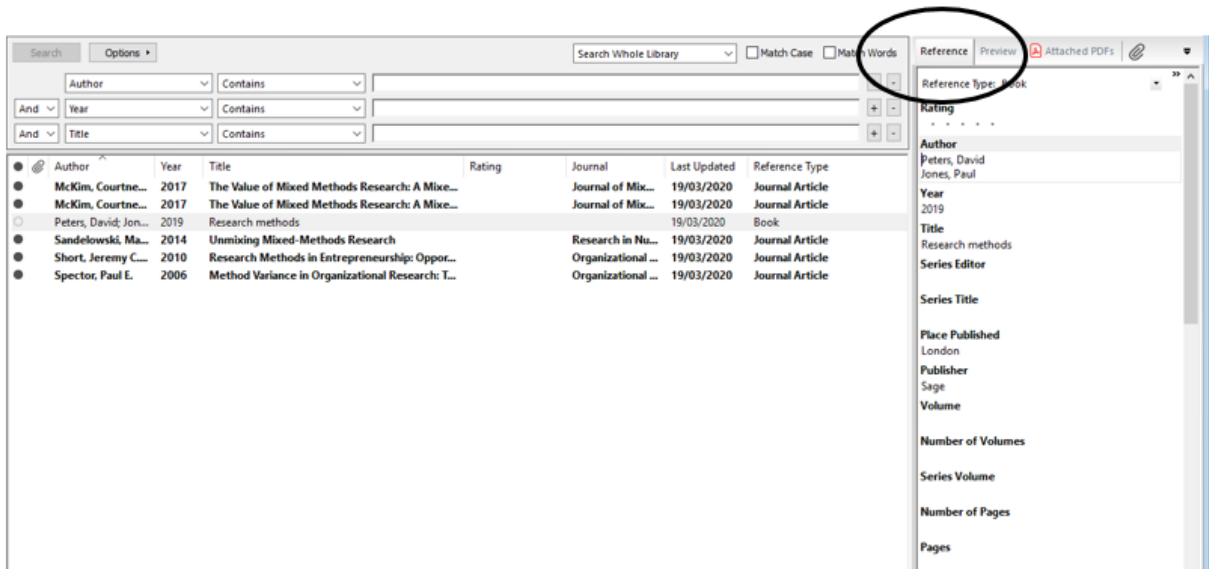


## Editing references

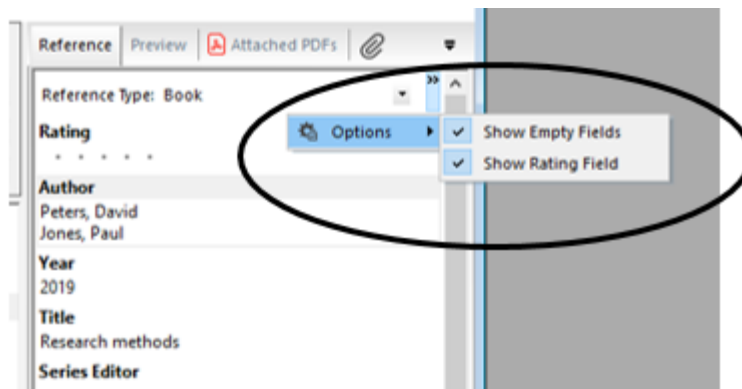
Each reference can be edited, if you need to add or subtract information. Within EndNote Desktop you can do this in two different ways.

From the list of references in the central panel, double click on the reference you want to edit. The reference window will open, and you can amend information as you require. Click on the red cross on the reference window to close the reference and your changes will be saved.

Alternatively, you can edit reference information from the main screen. Click to highlight the reference you want to edit and select reference on the right hand side of the screen.



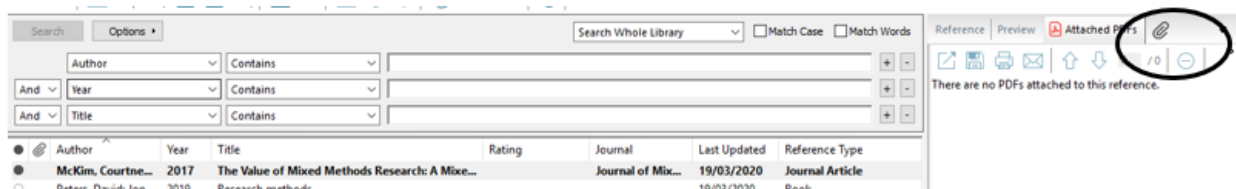
You can now amend any information within the reference. If you want to change the display you can also remove any fields, you are not using. To do this, select options and remove the tick next to show empty fields.



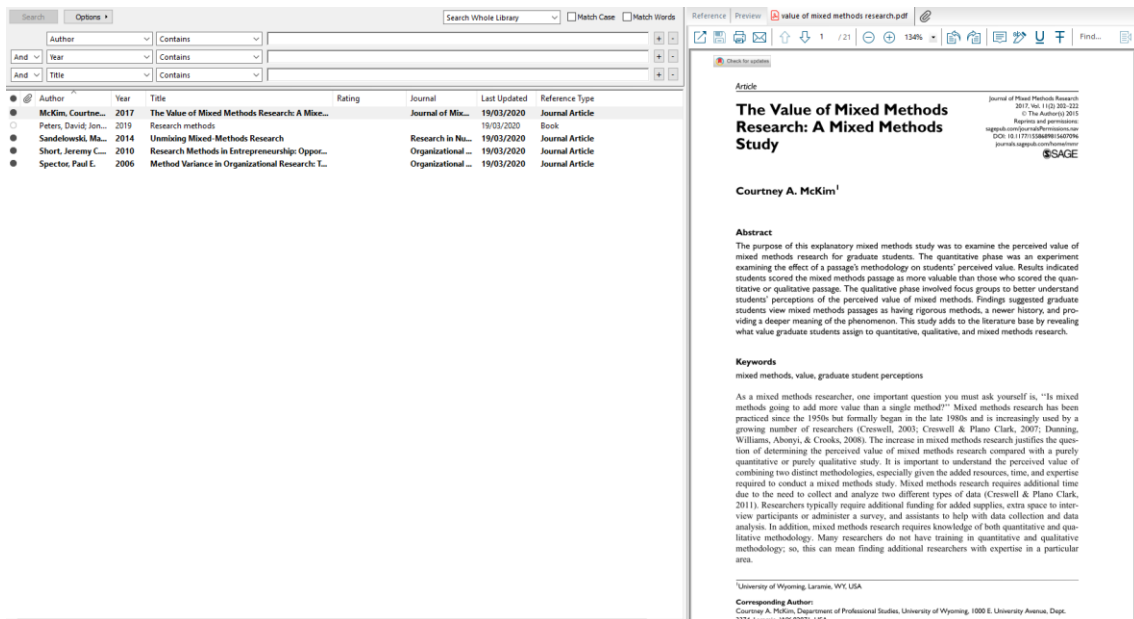
## Adding attachments to references

EndNote Desktop allows you to attach files such as PDFs to individual records.

Click to highlight the reference you want to attach a file to. On the right hand side of the screen click the paper clip icon.



Locate the file and click open and the PDF will appear in the window.



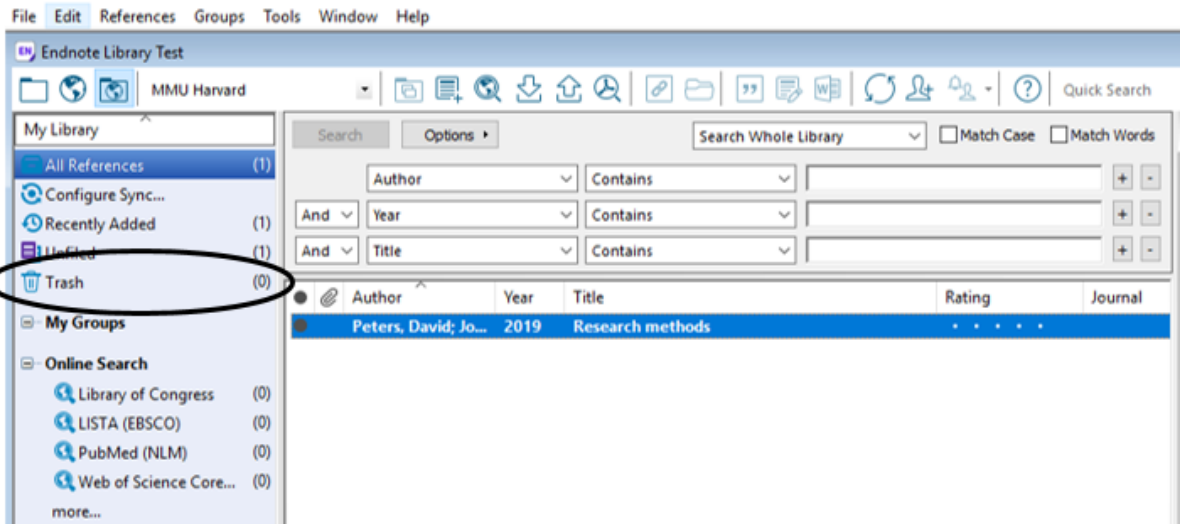
An added feature of EndNote Desktop allows you to either highlight text within the PDF or add sticky notes to relevant pages of the PDF. These tools can be accessed when viewing the PDF document.



Once a record has an attachment a paperclip symbol will appear next to the reference in the main reference display.

## Deleting references

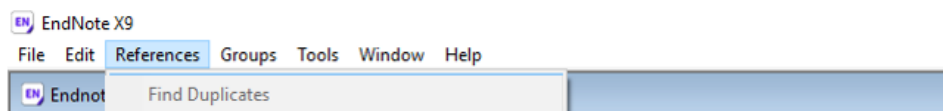
To delete any unnecessary records, click to highlight the record/s you want to remove and then drag and drop into the Trash folder. Records can be retrieved from the Trash, so long as it hasn't been emptied. To delete references from the Trash, click on the Trash icon and right click and select Empty or you can choose References from the top menu and then scroll down to the option to Empty the Trash.



## Removing duplicate references

If you are downloading many records from different sources, you may find that you end up with duplicate references in your library. EndNote has a handy tool to locate these for you.

Click on References then scroll down and select Find Duplicates



A new Find Duplicates window will be shown. Each duplicate will appear in turn and you can then select which reference you want to keep by clicking on the Keep this Record button. The other example will automatically be removed from the library and added to the trash folder. If you want to keep both examples, choose Skip and you will move onto the next duplicate example.



## Reordering the library

Your EndNote library can be organised in a number of different ways. The default is to order by the name of the first author. However, by clicking on one of the fields above the references, EndNote will re-sort records by Year, Title, etc.



Author	Year	Title	Rating	Journal	Last Updated	Reference Type
McKim, Courtne...	2017	The Value of Mixed Methods Research: A Mixe...		Journal of Mix...	19/03/2020	Journal Article
Peters, David; Jon...	2019	Research methods			19/03/2020	Book
Sandelowski, Ma...	2014	Unmixing Mixed-Methods Research		Research in Nu...	19/03/2020	Journal Article
Short, Jeremy C...	2010	Research Methods in Entrepreneurship: Oppor...		Organizational ...	19/03/2020	Journal Article
Spector, Paul E.	2006	Method Variance in Organizational Research: T...		Organizational ...	19/03/2020	Journal Article

To customise the display further choose Edit and then Preferences. Then choose Display Fonts and you can select any elements you want to add or remove. Then click OK and any change will now be displayed on screen. To return to the default display, go back to this screen and select EndNote Defaults and click OK and this will restore the original settings.

The screenshot shows the EndNote software interface. The main window displays a list of references with columns for Author, Year, Title, Rating, Journal, Last Updated, and Reference Type. The 'EndNote Preferences' dialog box is open, showing options for 'Fields to display in the library window'. The 'Display Fields' option is selected in the left sidebar. The main window shows a list of references with columns for Author, Year, Title, Rating, Journal, Last Updated, and Reference Type. The 'EndNote Preferences' dialog box is open, showing options for 'Fields to display in the library window' with columns 1 through 10. Column 3 is set to 'Author' and Column 4 is set to 'Year'. The 'Display all authors in the Author field' checkbox is checked.

## Rating Your References

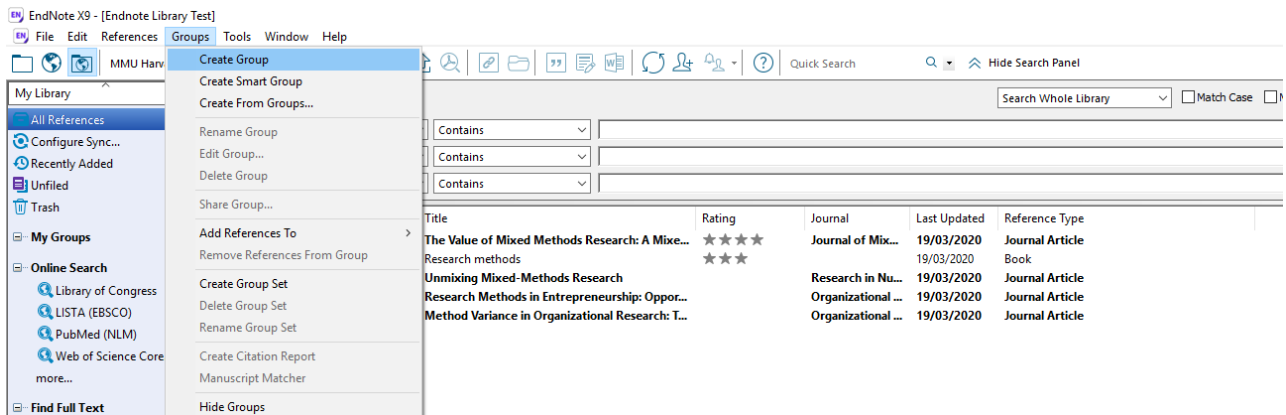
If it is helpful you can give your references a rating based on their usefulness. Place your cursor over the rating field and you can select an appropriate number of stars per reference.

Author	Year	Title	Rating	Journal	Last Updated	Reference Type
McKim, Courtne...	2017	The Value of Mixed Methods Research: A Mixe...	★★★★	Journal of Mix...	19/03/2020	Journal Article
Peters, David; Jon...	2019	Research methods	★★★		19/03/2020	Book
Sandelowski, Ma...	2014	Unmixing Mixed-Methods Research		Research in Nu...	19/03/2020	Journal Article
Short, Jeremy C...	2010	Research Methods in Entrepreneurship: Oppor...		Organizational ...	19/03/2020	Journal Article
Spector, Paul E.	2006	Method Variance in Organizational Research: T...		Organizational ...	19/03/2020	Journal Article

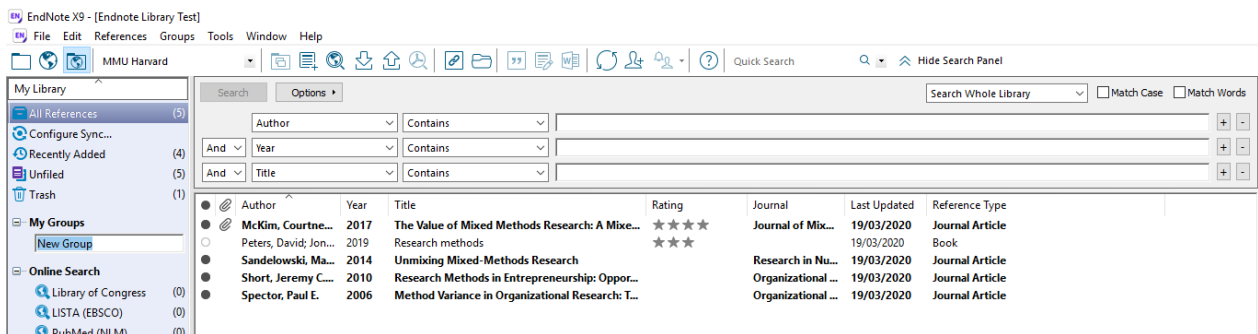
## Grouping your references

Records are automatically added to an All References group – but you can also create your own folders to organise your references further.

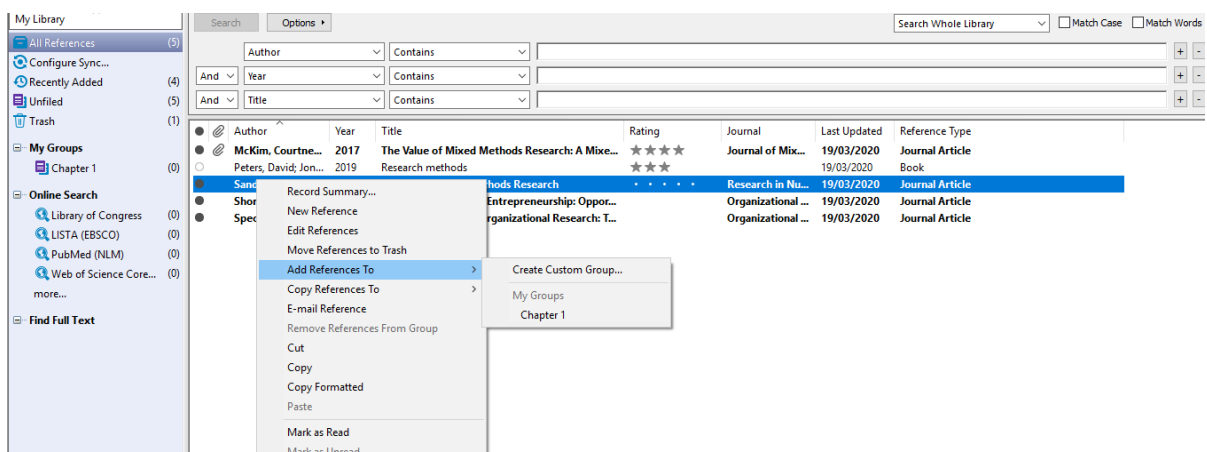
To create a new group, select Groups and then Create Group.



The new group will appear under My Groups. You will need to give the group a name i.e. Research Methods, Chapter 1, etc.

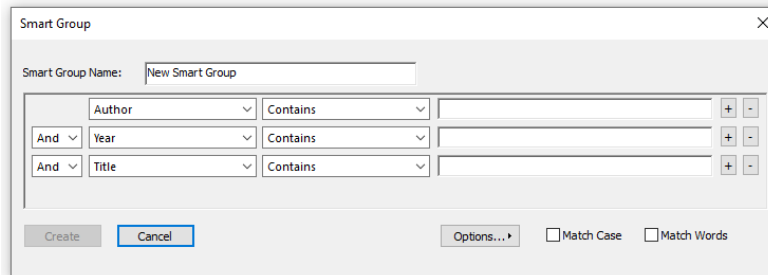


To add references to a group you can click to highlight reference/s and then drag and drop to the relevant group or highlight a reference/s and right click and then select Add Reference To and select the relevant group.



EndNote Desktop also includes a feature called Smart Groups. These are dynamic groups of references which update automatically using selected criteria.

To create a Smart Group, select Groups and then Smart Groups. A search box will appear. You can choose a name for your new Smart Group.

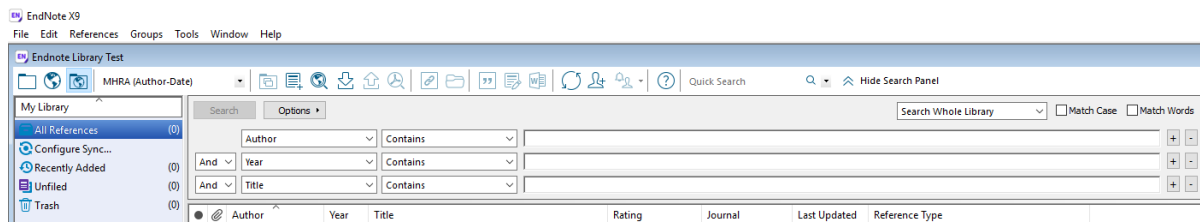


You can now set certain criteria for your group such as particular keywords, authors, ratings, reference types, etc. When you have set your criteria click Create. Your group will now appear in the left hand menu. Every time references are added which fit your criteria they will automatically be sorted into your smart group.

Please note that references can appear in multiple groups.

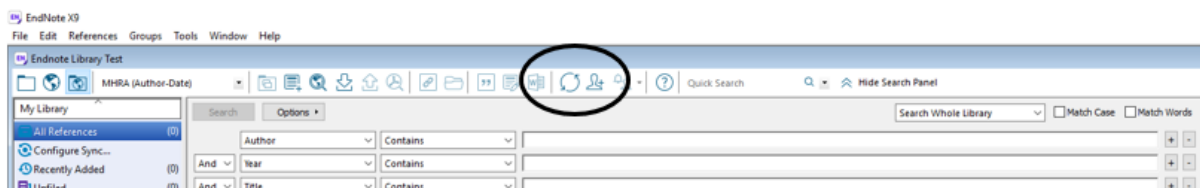
## Searching your EndNote Library

If you want to locate a specific reference in your EndNote library, then use the built-in search box. Simply type relevant search terms into the box and click Search. Click All My References to return to the full display.



## Syncing with EndNote Online

If you have an EndNote Online account references can easily be transferred from EndNote Online into EndNote Desktop or sent from EndNote Desktop into EndNote Online. To use the sync function, you need to select sync icon within EndNote and follow the on screen instructions to link accounts. This function is also available by selecting Tools and then Sync.



## Getting References from Databases

It is possible to search many of the library's resources and then add records into EndNote. On the library website you can find a full A-Z listing (<http://libguides.mmu.ac.uk/az.php>) of our resources, click the EndNote symbol to see specific instructions. The majority use a system called Direct Export.

### Direct Export using Library Search

To use direct export, you need to leave your EndNote library running and open a browser. Access Library Search from the library website ([www.mmu.ac.uk/library](http://www.mmu.ac.uk/library)) and run your search. You can select multiple records to transfer into EndNote.

To do this click on the Save icon located on the right hand side of each record.



Once selected, the icon changes and items will be added to the Saved Items folder located above the result list.

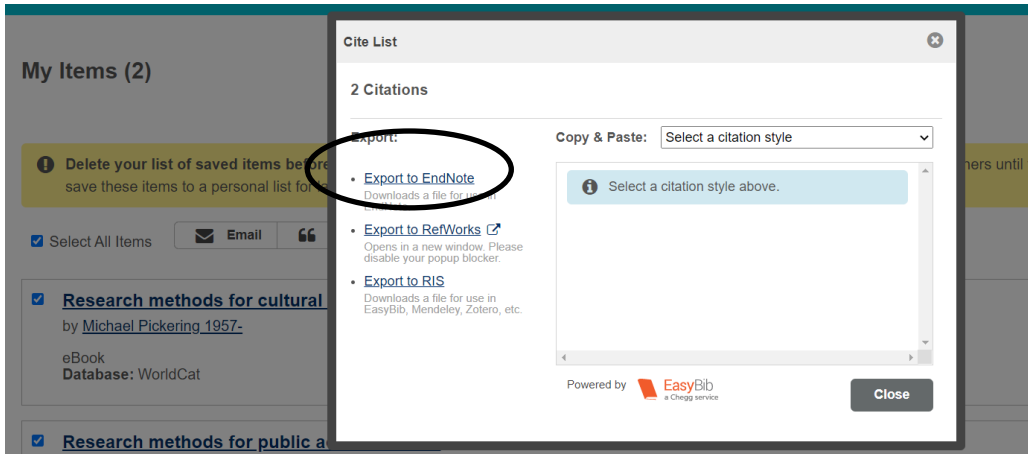
The screenshot shows the Manchester Metropolitan University Library search interface. At the top, the logo and name 'Manchester Metropolitan University LIBRARY' are visible. A search bar contains the text 'research methods'. To the right, there is a user greeting 'Hello' and a 'Sign In' link. Below the search bar, there are options for 'Advanced Search' and 'Resources'. The main content area shows '251,125 results in MMU Library'. On the left, there are filters for 'Retain Filters', 'Clear Filters', 'Group This Search', 'Refine This Search', and 'Held By Library'. The search results are sorted by 'Best Match'. A single result is shown: 'Research methods for public administrators' by Gail Johnson (1947-). The result includes a book cover, the author's name, the publication year (2002), a summary, and subjects. A 'Save' icon (a star) is visible next to the result, and it is circled in red. Other icons for 'Cite' and 'Share' are also present.

**NB** The selected records will disappear when you close the session, unless you have signed in to Library Search and chosen to save them to a folder.

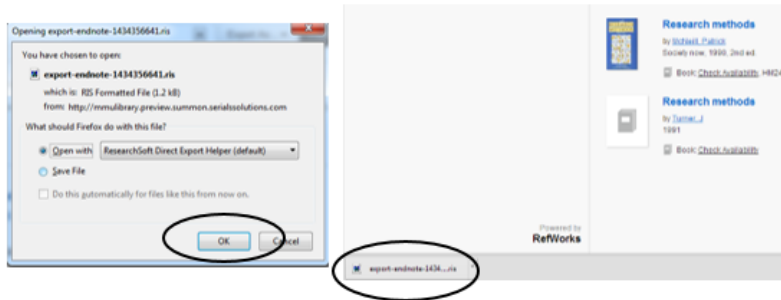
When you are ready to transfer your results to EndNote, click on Saved Items above the result list.

A new screen will appear, listing the records to be transferred. To transfer click on

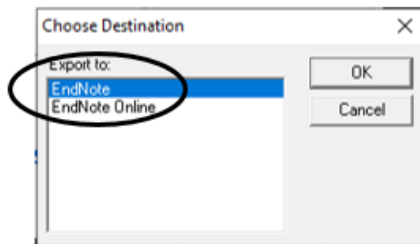
A new box will appear. Choose Export to EndNote.



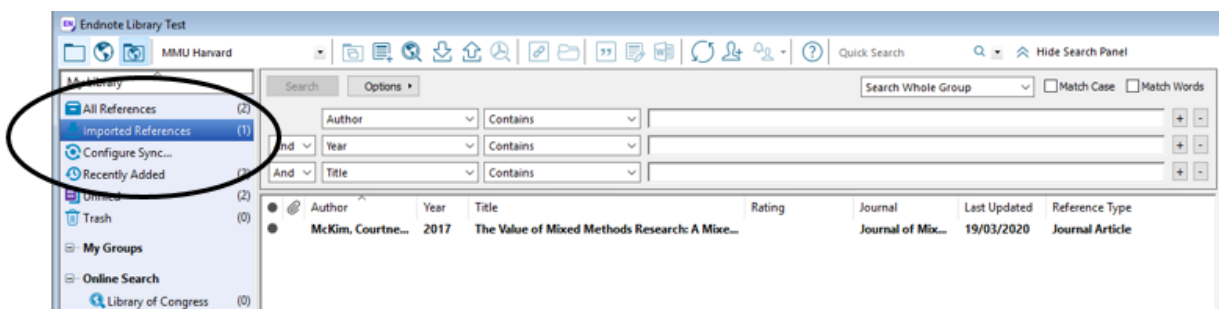
Depending on your browser, you may first need to click Save then either double click on the downloaded file or select open file near the bottom of your browser or select open with, then click OK.



Next, a box called Choose Destination box will appear, highlight EndNote, and click OK.



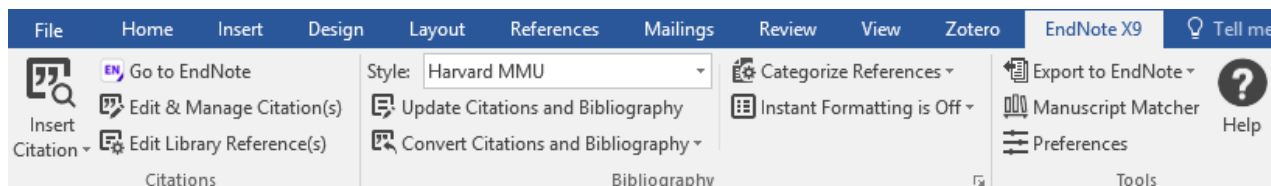
EndNote will open and only your imported references will appear in the window. Click All References to see your full library.



# Using EndNote and Word

## EndNote toolbar

When you install EndNote Desktop onto your PC or Mac then the Cite While You Write toolbar is automatically added to Word, which allows you to add citations to your document.

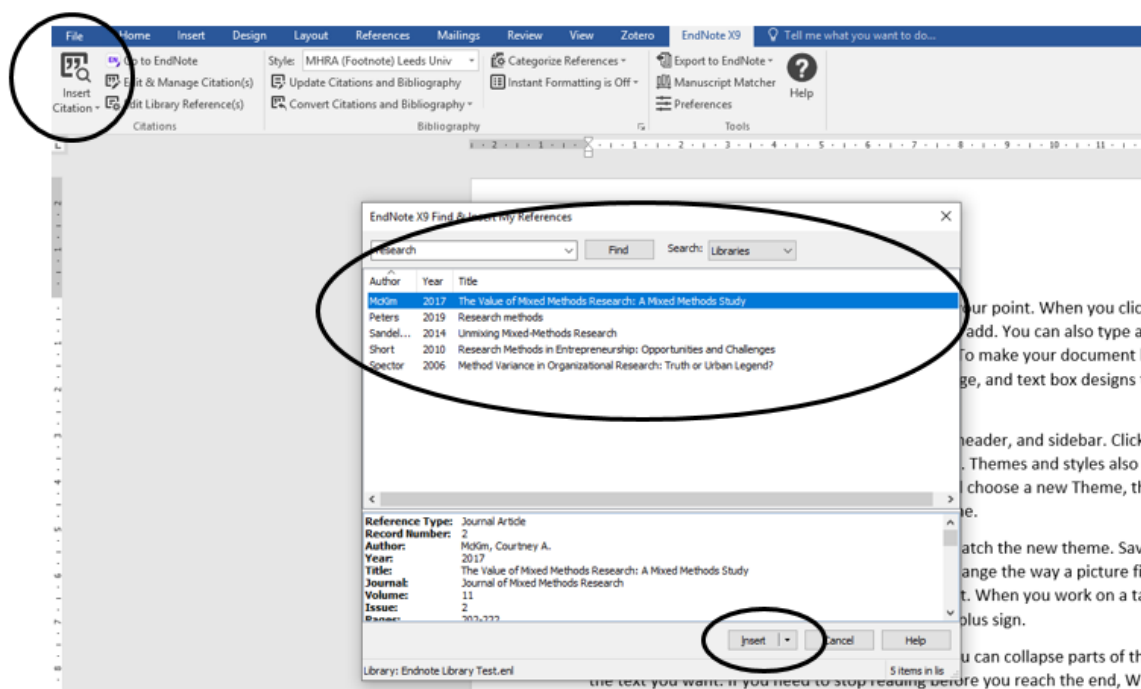


To ensure that it is working with Desktop, make sure that EndNote X9 is listed on the top of the tab. If it is not click on Preferences, then Application and select Desktop, then click OK.

## Inserting a citation

Once connected to EndNote, you can start writing your text. When you need to insert a citation, simply place the cursor, where you want the citation to appear. Next click on Insert Citation on the EndNote toolbar.

A search box will appear, and you can type in a word/name from your reference and click Find to locate the source you require. When you have found the right reference click to highlight and then choose Insert.



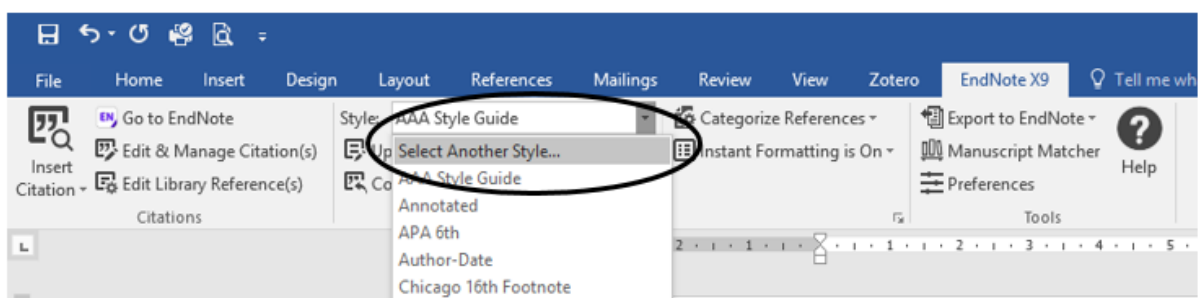
The citation will appear in the text and a bibliography will be created at the end of your document. You can continue to add citations and create your bibliography as required.

## Setting the referencing style

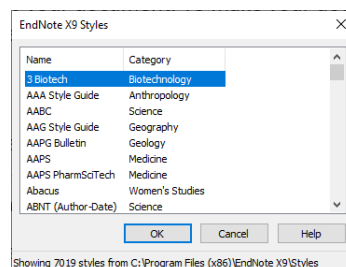
To choose how your citations and bibliography appear, you simply need to pick the relevant referencing style.

Please note that the MMU Harvard referencing style is not included with the initial download of EndNote Desktop, but can be supplied by the library, simply email [library@mmu.ac.uk](mailto:library@mmu.ac.uk). Instructions for adding this to the software are available on page 2 of this guide.

Next to Style on the EndNote toolbar select the drop-down menu. Only a limited number of styles are listed, if you choose Select Another Style, you can access the full list.



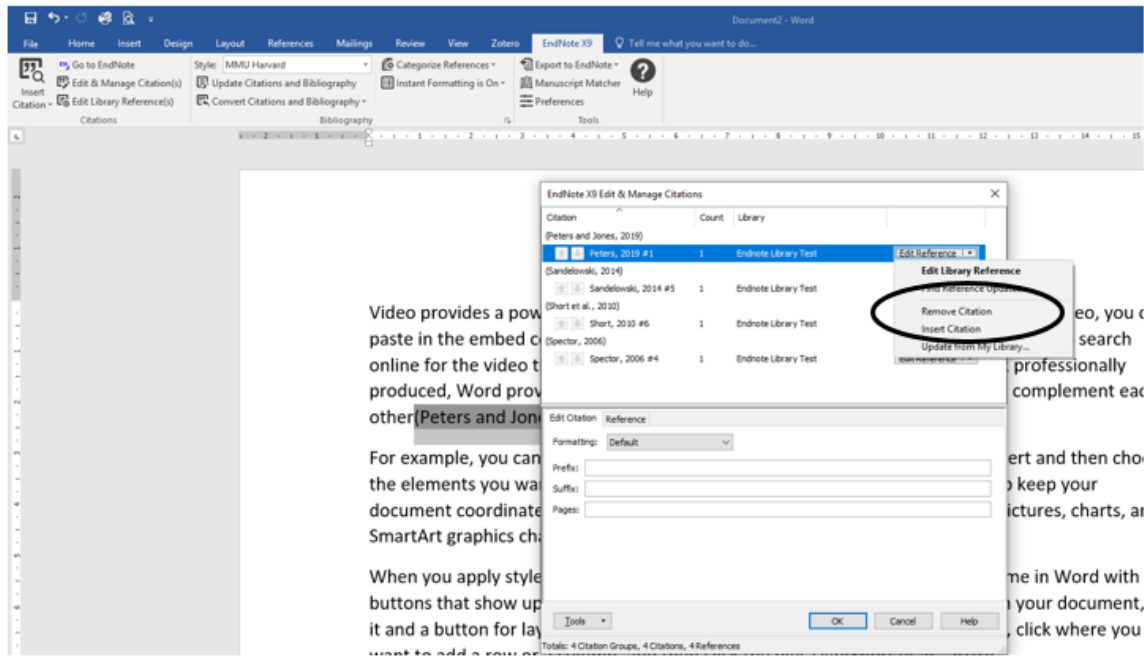
A new box will open, scroll down to the style you require, highlight and click OK. Your citations and bibliography will be reformatted in that specific style i.e. MMU Harvard or Harvard MMU.



## Deleting citations

If you want to delete or change a citation you need to do this using the commands on the EndNote toolbar.

To delete a citation, place your cursor in the citation you want to remove. Choose Edit & Manage Citations from the EndNote toolbar. Then click the drop down arrow next to Edit References and choose Remove citation, then click OK.



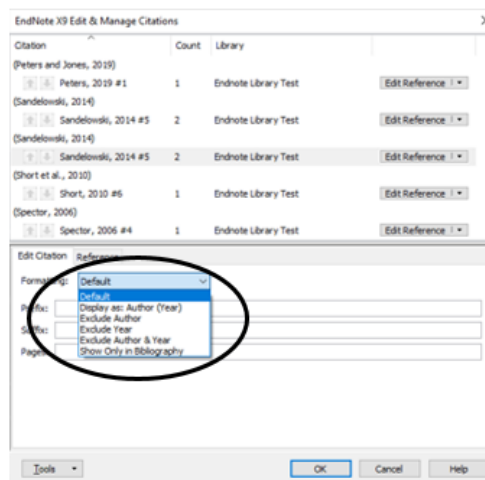
This will remove the citation from the text and the matching entry from the bibliography.

Please note if you have used this source multiple times in your text, you are only removing this citation and it will remain in your bibliography until all examples of the source are removed from the document.

## Excluding parts of citation

In some cases, you may want to use an author's name as part of the text rather than included within the citation bracket. You need to use EndNote to make this change.

First place your cursor in the citation you want to edit and then Select Edit & Manage Citation on the EndNote toolbar. Then select the drop-down arrow next to Default and choose Exclude Author. Only the year will now appear in the citation. You can now add the name of the author as part of the text.

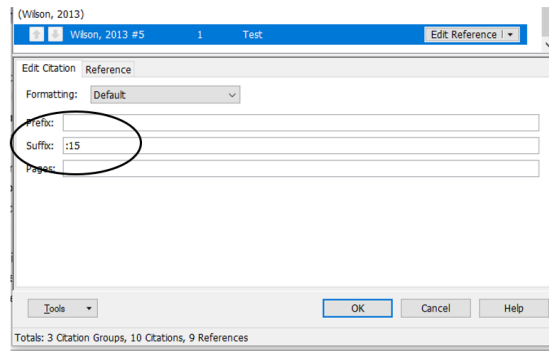




## Including page numbers in a reference

If you need to include a page number as part of your reference as you are giving an exact quote, you can add this to your citation using EndNote. First place your cursor in the citation you want to edit and then Select Edit & Manage Citations on the EndNote toolbar.

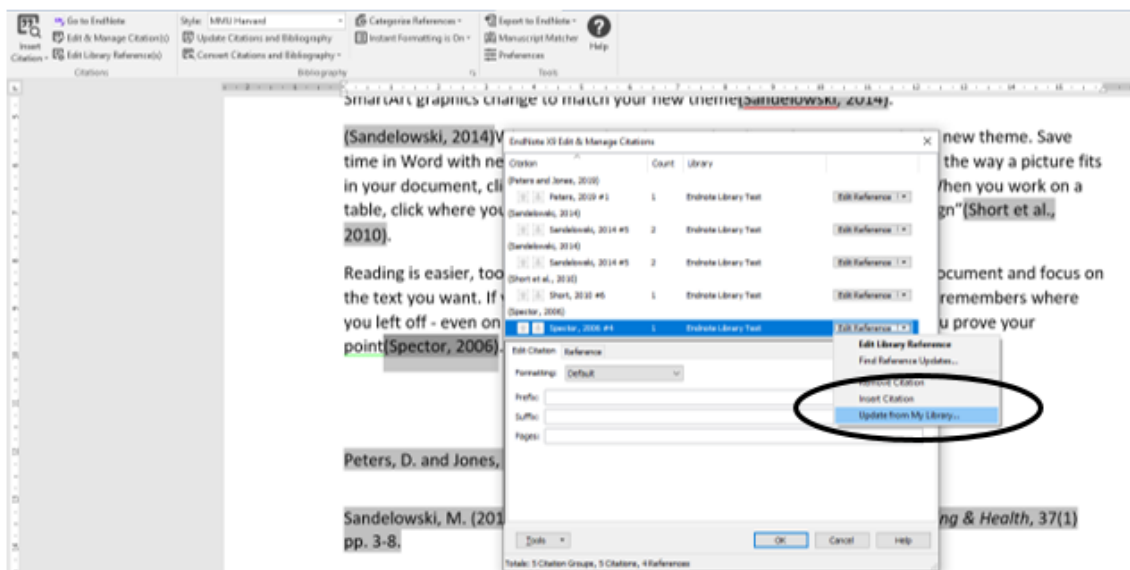
Check the correct citation is highlighted and then type the page number in the field marked Suffix i.e. :15. Then click OK. Please note you need to type the : before adding the page number, so that it is included in the citation i.e. (Wilson, 2013:15)



## Editing citations/bibliography

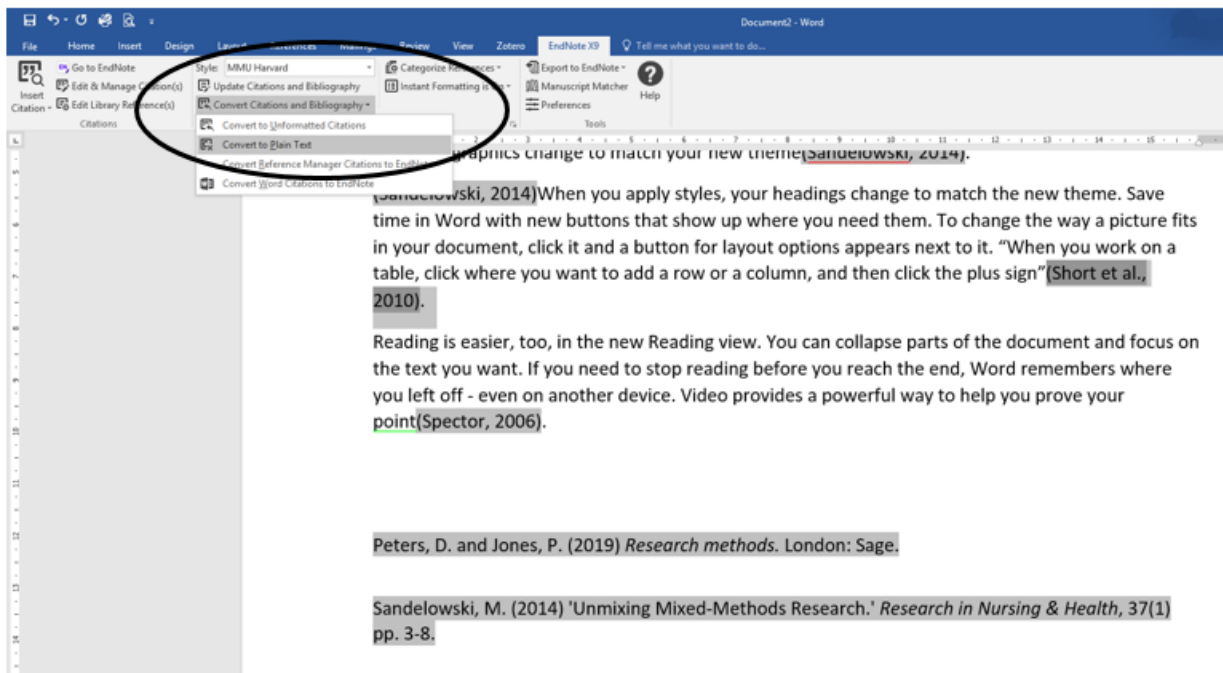
If something is appearing incorrectly in a reference in Word, it is probably due to an error in the data in your EndNote library.

To amend this in Word, first return to EndNote and make any necessary updates. Then in Word, place the cursor in the citation you want to update, choose Edit & Manage Citations. Click on the drop down arrow next to Edit Reference and select Update from My Library. The reference screen will appear, click Insert and then OK and the corrected reference will now appear in your document.



## Submitting documents electronically

If you are intending to submit a document electronically, you might find it necessary to remove the links between your EndNote Library and your Word document. On the EndNote toolbar in Word, select Convert Citations and Bibliography, choose Convert to Plain Text.



A message will appear telling you that a new version of your document will be created, click OK. You can now save this version of the document. In the new version, all links to EndNote have been removed and this version can be submitted electronically. If you need to subsequently edit the document, you will need to return to your original, make the necessary changes and repeat the process above.

Further help on EndNote is available on the library website:

<http://libguides.mmu.ac.uk/EndNote>