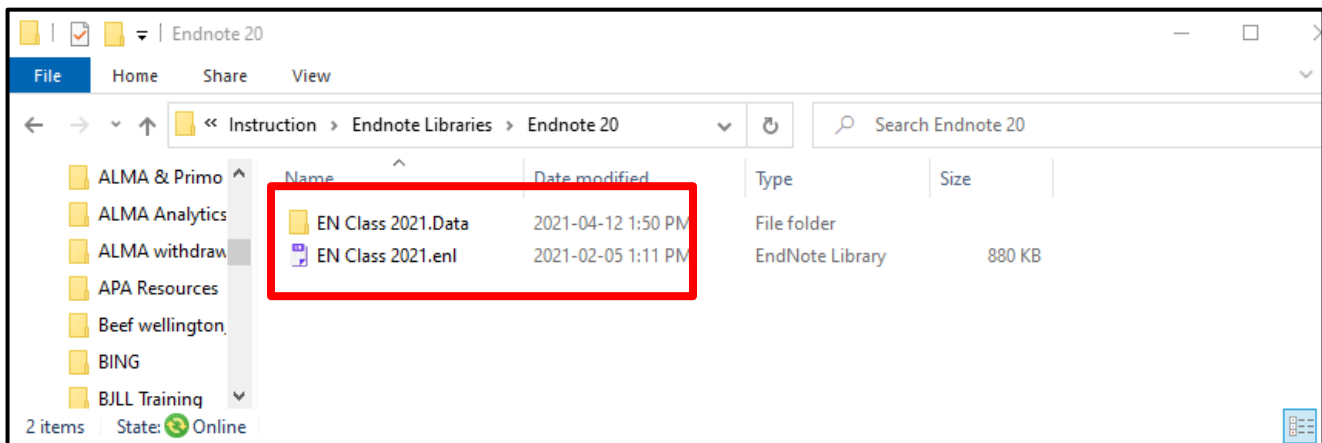## ENDNOTE 20 on Windows QUICK GUIDE

CREATE AN ENDNOTE LIBRARY

On the top menu select **File > New**. Type in the name of the library. Designate the folder where you want to save. An EndNote library consists of **two parts: a) .enl file b) .data folder**

ADD REFERENCES FROM DATABASES

WEB OF SCIENCE

1. Perform a search query. **Select references** as needed.
2. Go to the **Export** drop down menu and choose **EndNote Desktop.**
3. You can also select **All Records** on page or choose **1,000 records at a time** for a large number of references
4. Under **Record Content**, choose **Full Record** (this action will export the complete information of the selected references). Click **Export**.
5. If using **Firefox**, choose **ResearchSoft Direct Export Helper** for direct export
6. For other browsers, choose **Save File (.savedrecs.ciw)**. Within EndNote > go to **File** > choose **Import** > locate the **.savedrecs** file > under **Import option**, select **Web of Science Core Collection** from the drop down menu > click **Import**

OVID Databases – i.e. MEDLINE, EMBASE, APA PsycInfo, etc.

1. Search and select each reference as needed. Select **Export** from the results menu bar.
2. Change **Format** to **EndNote**, change **Fields** to **Complete Reference**
3. Click **Export.** If using **Firefox**, choose **Open with ResearchSoft Direct Export Helper** for direct export
4. For other browsers, choose **Save File (.cgi)** > in Endnote > go to **File** > choose **Import** > locate the **.cgi file** > under **Import Option**, select **APA PsycInfo** from the drop down menu > click **Import**

To export batches up to **1000**, specify a **range of results** (e.g. 1-1000) in the **Range box**
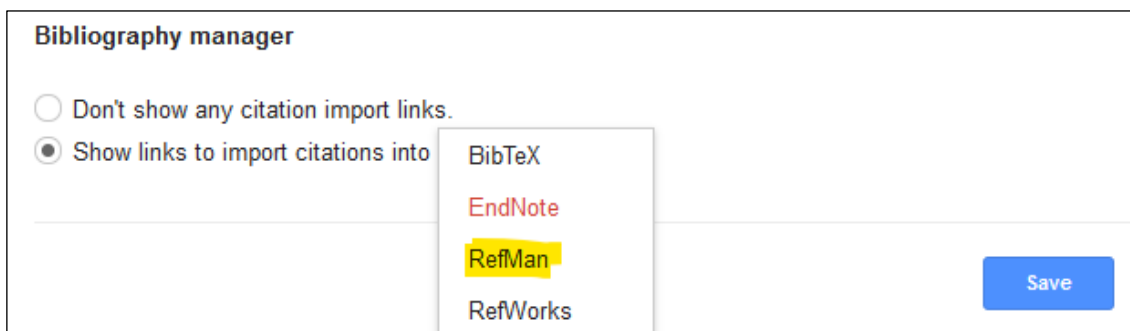
EBSCO Databases – i.e. Academic Search Complete, Business Source Complete, CINAHL, etc.

1. Search and then click **Add to Folder (blue folder icon)** for each reference needed.
2. Go to **Folder** from the top menu or the right hand column.
3. Select references for export. Click **Export**.
4. Choose **Direct Export in RIS Format and** then select **Save.**

To export **All Results**, click on the **Share** menu, under Export Results: **Email a link…** > choose **RIS Format** > select **Send.** You will be e-mailed a link to a **.zip** file. Download and extract the file into a **.ris file** > **Import** into EndNote

GOOGLE SCHOLAR

1. Click the **Options** button (**three horizontal lines** next to the Google Scholar logo)
2. Select the **Settings** menu, Under **Bibliography Manager**, go to **Show links to import citation into** and on the drop down menu, select **Refman**, click **Save.**


3. Perform your search and select citations to add to EndNote library. Choose **Import into Refman**.
4. Select **Open with EndNote 20** if using **Firefox** or save file and import using **.RIS** filter option.
5. You can import one reference at a time or multiple references.

You need a **Google account** to import multiple references and will need to login before selecting citations. On the results lists page, choose references by clicking on the **star icon** at the bottom of each citation. The **star icon changes into blue**. Click **Done** after selected reference(s). This actions saves the references to **My Library**.
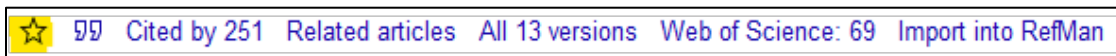
When selection is complete, go to **My Library** (top right corner). The marked references are shown. Select All references by clicking on the **square icon** and selecting **RefMan** from the **download icon.** Select **Open With Endnote** if using Firefox or **Save File** and import using **.RIS filter** option. References are imported to Endnote.

ORGANIZE REFERENCES

Make it easy to view your references by creating groups. On the top menu, select **Groups** > Create **Group Set** or **Group** or **Smart** Group.

IMPORT STORED PDF'S

EndNote allows you to import a PDF or a folder of PDFs into your library with all the bibliographic information extracted automatically, under the condition that the PDFs have DOIs embedded. The best practice is still to import records from research databases to ensure your EndNote records are accurate and complete.

1. Open your EndNote library.
2. Under the File menu, choose **Import**.
3. If it is a **single PDF, choose File**; if it is a collection of PDFs placed in a folder, then choose **Folder.**
4. In the **Import File or Import Folder** popup window, retrieve the PDF file or folder and click OK.
5. Make sure the **Import Option is PDF**. You can choose Import All (can dedup later).
6. Click on the **Import** button. EndNote will try to find a **DOI** on the first couple pages of the article and if it does, it will import the complete information. If it does not find a DOI, it will import the PDF file only

ADD REFERENCES MANUALLY

Use this as a last resort if you are not able to import records from a database. Under the **References** tab > **Add**

New Reference > Remember to click **Save** once all the data has been entered. **Alternatively**, choose the 📋⊞ icon on the main EndNote page and **Add a new reference** manually.

FIND DUPLICATES

Select **Library** on the menu bar> Find **Duplicates.** Compare references on the side by side window and decide which version to **Keep**.

FIND FULL-TEXT (FFT)

Select the references you want to find full text for by highlighting them or Select All
Select **References** on the menu bar, go to **Find Full Text** > slide to the next **Find Full Text** selection
If you have many references to find full text for, EndNote will search **250 references** at a time

Find the two **Find Full Text URL's** from the [EndNote Citation Tool](#) guide
Go to the EndNote Desktop page, choose the **Find Full Text tab**.
Within EndNote, select **Edit** on the menu bar, go to **Preferences** and copy and paste the **FFT url's**
Copy and paste on the **two URL paths** (see below), Click **Apply** > Click **OK.**

Open URL Path: https://ucalgary.primo.exlibrisgroup.com/openurl/01UCALG_INST/01UCALG_INST:UCALGARY?
Authenticate With URL: http://ezproxy.lib.ucalgary.ca/login?url=
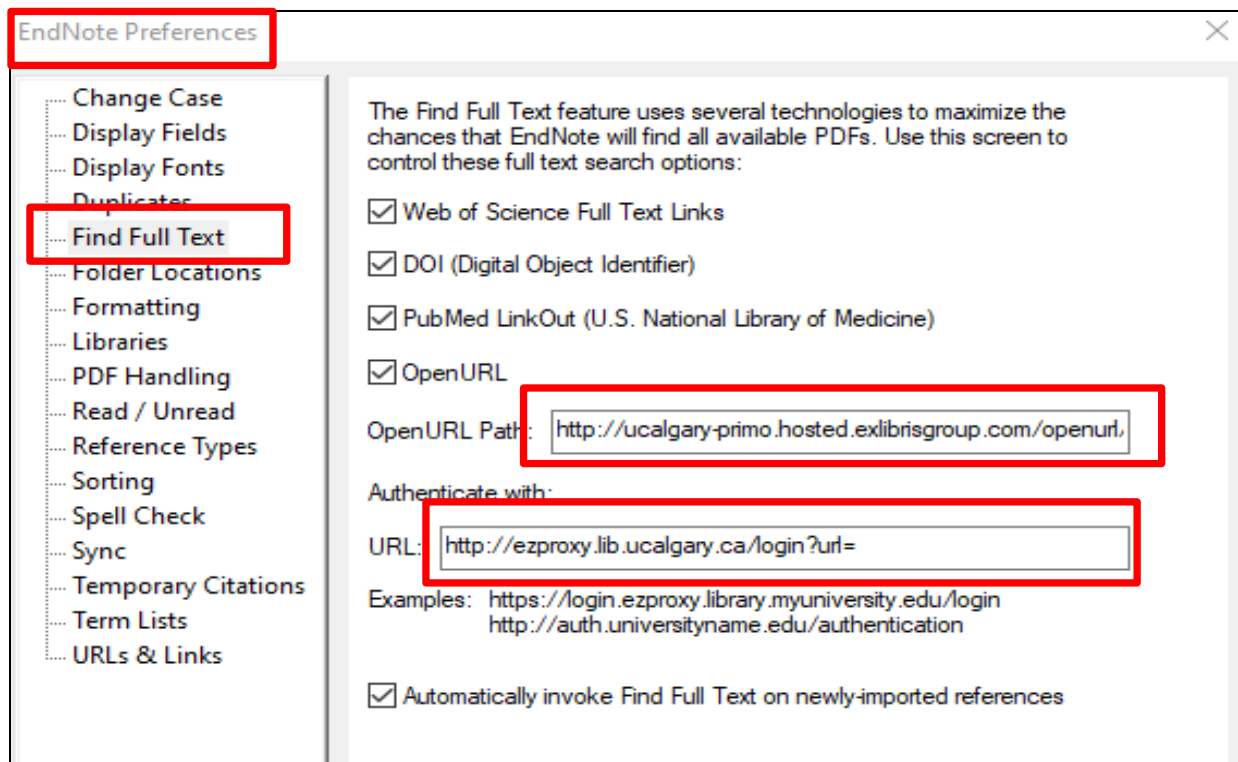
USING CITE-WHILE-YOU-WRITE (CWYW)

The **CWYW plug-in** installs automatically when you load EN desktop onto your computer. Use CWYW with MS Word to insert references, edit citations and format bibliographies. Within Word > go to the **Endnote 20 tab**
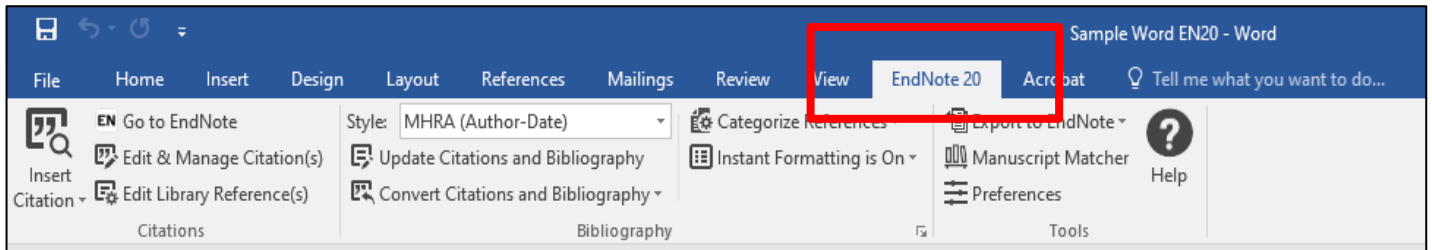
SHARE REFERENCES

Share Groups with Multiple Users: Highlight a **Group to share** > click on the [icon] button > enter the email address/addresses of the people that you would invite in the **email** box > click the **Invite** button

Share an entire EndNote Library: Select **File** on the menu bar > select **Compressed Library (.enlx**) > email the **.enlx file** to a recipient who has an active EndNote program

Copyright: U of C's licensing agreements restricts sharing PDF's only among UofC Endnote users

KEEPING YOUR ENDNOTE LIBRARIES HEALTHY

- EN libraries consist of two parts: **enl file** + **.data folder**. Both parts are needed for the library to work correctly
- EN libraries should **not** be stored in cloud-syncing folders such as **Dropbox, Google Drive, OneDrive, SugarSync** since these can corrupt EN libraries over time
- Microsoft Word documents with EndNote citations contain **field codes**. **Always save as Word documents**. Saving a Word document in another format, such as an **OpenOffice (.odt)** format can cause corruption or erasure of the codes.

ENDNOTE SOFTWARE SUPPORT AND TRAINING

For in-depth support, contact EndNote Technical Support at: https://endnote.com/contact/

Consult the University of Calgary library EndNote Citation Tool guide for customized resources – i.e. recordings based on EndNote workshops

Produced by EndNote, the User's LibGuide contains instructional information with links to resources

Find answers to common questions on the Endnote Knowledge Base portal

Feel free to contact me for specific EndNote questions: Lourdes Yturzaeta