EndNote Menus Reference Guide

EndNote Training

1 What EndNote Can Do for You

EndNote is a reference management solution which allows you to keep all your reference materials in one place, while also allowing you to access those materials online, on the desktop, or on an iPad, and to share them with other EndNote users worldwide.

- EndNote is a searchable database specifically designed to hold bibliographic information, notes, abstracts, keywords, and related files. EndNote databases are called "libraries."

- EndNote includes advanced search capabilities, able to search by specific fields as well as do complex searches of multiple fields linked together by the standard Boolean operators "and," "or," and "not." This means you can have libraries with thousands of references and still find the reference you need quickly and easily.

- Each EndNote record can include up to 45 attachments, of any file type. So not only can full-text PDFs be attached, but audio files, spreadsheets, graphics, or even videos — everything you've accumulated regarding that reference consolidated in one EndNote record.

- EndNote can create bibliographies according to the formatting rules of over 6,000 journals or style manuals.

- EndNote can import reference data, minimizing time spent on manual data entry.

- EndNote works on Windows, Macintosh, iPad, and online.

2 EndNote Features & Commands, What Do They Really Do?

Below are descriptions of major layout and menu-item commands available in EndNote. Although this list is for EndNote on the desktop, many of the features discussed also have online or iPad equivalents. Features common to general desktop software, such as opening files or printing, are not included in the list below. Minor feature options available within the major features are also not included in the list.

Menu items are listed in the order they appear in the menu. Not all menu items are listed.

Feature or Menu Item	What It Does
The Library Display	This displays the contents of the entire library, and allows several customization options.
Mode Buttons see (1) Win / (2) Mac	These three buttons, grouped together on the toolbar, control the total library display.
Local Library Mode	This mode shows only the EndNote library open on your computer, with all your references and groups, with nothing about online search.
Online Search Mode	This mode hides your local library references and groups. It shows a temporary preview library where you can do your online searching, examine the results, and select the references from your search results you want to keep. You can then copy the references you want to keep to your permanent local library.
Integrated Library & Online Search Mode	This mode shows both your local library and online search options. If this mode is used to search online, all retrieved references are automatically imported into your library and you must delete references you do not want to keep.
Groups Panel see (2) Win / (1) Mac	This panel shows all groups and group sets in the library, along with temporary groups that may appear while working in the library. Examples of temporary groups are *Imported References* or *Copied References*, which will only display for the current EndNote session.
Bibliographic Style Preview see (3) Win / (7) Mac	The style selected here controls formatting in the *Preview* subpanel and when using the *Copy Formatted* command. The style selected here does not control the style used in documents.
Search Panel see (4) Win / (3) Mac	This allows detailed searching by field.
Reference List Panel see (5) Win / (4) Mac	This panel lists the references for the group selected in the *Groups* panel.

Feature or Menu Item	What It Does
Reference Panel see (6) Win / (6) Mac	This panel contains three subpanels: *Reference*, *Preview*, and *PDF*. These subpanels can be displayed either at the right side of the reference list or below it. Depending on configuration options chosen using the *Layout* button and operating system, the subpanels may be hidden, appear as tabs, or as separate panels in a larger panel.
Reference	This shows details for the highlighted EndNote record and allows editing of record data.
Preview	This shows a preview of the how the reference would look in a bibliography if formatted with the selected style.
PDF	This shows PDFs attached or linked to the record. The *Open PDF* button in the *PDF* panel's toolbar will open PDFs in a larger window for viewing and annotation.
Layout Button see (7) Win / (5) Mac	This button controls the appearance of the panels on the screen. The *Groups* and *Reference* panels can be hidden or displayed using this button.

Windows Library Screen

1. Mode buttons (Local Library Mode, Online Search Mode, Integrated Library & Online Search Mode)
2. Groups panel
3. Bibliographic style preview
4. Search panel
5. Reference list
6. Reference panel
7. Layout button

Macintosh Library Screen

1. Groups panel
2. Mode buttons (Local Library Mode, Online Search Mode, Integrated Library and Online Search Mode)
3. Search panel
4. Reference list
5. Layout button
6. Reference panel
7. Bibliographic style preview

Feature or Menu Item	What It Does
The File Menu	
New	This creates a new EndNote library. Note that EndNote libraries should never be kept on network drives, flash drives, or cloud-syncing folders or drives such as Google Drive, iCloud Drive, OneDrive, OneDrive Business, SugarSync, Box, Dropbox, or any other cloud-syncing service. All of these will corrupt EndNote libraries.
Open Library	This opens EndNote libraries or compressed libraries. It also opens and converts Reference Manager or ProCite databases to EndNote libraries.
Open Shared Library	This opens libraries others have shared with you using the EndNote *Share* feature. The first time a library shared with you is opened on your computer, EndNote creates a complete copy of that library on your computer. Any changes made in a shared library are synchronized to every copy of the shared library, whether on the desktop, online, or on iPad.
Save a Copy	This saves a complete copy of the library with a new name or in another location. It is one way to back up a library that is too large to use the *Compressed Library* feature with.
Share (Desktop only, requires EndNote X7 or above)	This allows you to share one synced EndNote library with other EndNote X7 or X8 desktop users. People you share your library with have complete access to all records and attachments. As stated above, any changes made in a shared library, by any member of the sharing group, are then synchronized to every copy of the shared library. If you are sharing a library, we recommend using the *Compressed Library* feature to make frequent backups of your library.
Export	This can be used to create independent bibliographies, which can then be opened in a word processor, or to create text files which can be imported into other programs.
Import	This imports text files saved from online databases, PDFs you already have on your computer, or tab-delimited files in a format compatible with EndNote. It is also possible to import one EndNote library into another and filter out duplicates during the import.
Compressed Library	This creates zipped files to back up, email, or archive your EndNote library. Compressed libraries can safely be archived in cloud-syncing folders or on a network drive, but must be moved to the local computer's hard drive before opening. Note that most operating systems have about a 4 gigabyte size limit for compressed files, so very large libraries may require another backup method, such as *Save a Copy*.

Feature or Menu Item	What It Does

The Edit Menu

Undo	*Undo* does not allow multiple levels of "undoing" like it does in most word processors. It will undo changes in a field if your cursor has not left the field, but will not work after you have left that field in the record. It cannot undo changes that apply to multiple records in the library, so it would not undo changes from *Find and Replace* or *Change/Move/Copy Fields*.
Clear	The *Clear* command is situational. If used for records selected in a *Custom Group*, it will remove the records from the group; if used for records selected in a *Smart Group, Combined Group,* or *All References,* it will send the record to the *Trash*.
Copy Formatted	This copies selected references into another application, formatting them with the *Preview* style selected in EndNote.
Find and Replace	This searches for and replaces text in EndNote records. Note that it will replace text, but cannot change the font used for that text. Always back up your library before using this command because there is no way to undo the change if you make a mistake.
Output Styles	This allows editing of existing output styles or creation of new output styles. Output styles control how references will appear in citations and bibliographies, or when using the *Copy Formatted* command; output styles control the format of data that is *sent from* EndNote*.*
Import Filters	This allows editing of existing import filters or creation of new import filters. These filters allow EndNote to import data from online databases through text files or direct export; import filters control how data *comes into* EndNote.
Connection Files	This allows editing of existing connection files or creation of new ones. Connection files are a combination of import filters and instructions for interacting with a z39.50 Internet server. Connection files will only work with databases using the z39.50 Internet protocol.
Preferences	EndNote is extremely customizable. Changes made to the preferences apply to the current computer and will not apply to a library when it is opened on a different computer. On Macintosh, this command is available under the *EndNote* menu.

Feature or Menu Item	What It Does
The References Menu	
New Reference	This creates a new EndNote record for manual data entry. This is sometimes necessary for references that are not available online or are not available in an importable format.
Edit Reference	This opens a record in a separate window to allow editing of the record. The same window is used for the *Open PDF* command, but this command shows the record data instead of the PDF. The view can be controlled through the *Layout* button(s) in the lower-right corner of the window.
Move References to Trash	This allows you to move selected references selected to the Trash, where they are held until you empty the Trash.
Go To	If a record is open for editing, this command searches for text within that record. An EndNote record's text fields can hold up to 64K of data, so this command can minimize scrolling through long records.
Copy References To	This copies selected records to another EndNote library, even if that library is not currently open in EndNote. It is usually used to copy data from the *Online Search* mode window and has a shortcut button on the toolbar.
E-mail Reference	If you have an MAPI-compliant email program, this command will send the EndNote record selected, formatted with the *Preview* style, and its attached PDF to a new email in your email program. This feature does not work with web-based email such as gmail.
File Attachments	This provides options for working with attachments of the selected record. Attachments can be opened, saved with new names, or renamed.
PDF Viewer	This allows manipulation of a PDF in the PDF viewer, whether in the *Reference* panel or when the PDF is opened in a larger window.
Find Full Text	This enables EndNote to look for PDFs online that match selected references in the library. If matches are found, EndNote downloads those PDFs and attaches them to the matching selected record. So with this command, EndNote is looking on the Internet for PDFs matching records you already have and only for records you already have; it is not importing PDFs and will not create new records.
Find Reference Updates	This searches the Internet for updated data for selected records. If matching records are found online, it displays both your original record and the found online record side-by-side, allowing you to "fill in the blanks" when you have incomplete records in your library.

Feature or Menu Item	What It Does
The References Menu	
URL	This includes an option for opening a web page from the URL field of a record, but the *OpenURL Link* option will also allow you to send information about a record to your school's OpenURL server in a browser window. This can be helpful for records *Find Full Text* is unable to find matching PDFs for. You must configure the *Find Full Text* preferences with your OpenURL server's address to use the *OpenURL Link* command. Ask your school library if you have an OpenURL server and for the server address.
Figure	This attaches one file to an EndNote record, using the *Figure* field in the record. The contents of the *Figure* field can then be inserted into a Word document and the caption can be formatted by EndNote. Note that inserting a figure into a Word document from EndNote embeds the entire graphic file into the Word document. This can result in very large Word files if there are many attachments. For large Word documents, it may be better to manage graphic files manually and link them to the Word document, which results in smaller Word documents than embedding.
Show/Hide References	These commands show or hide selected references. Some commands apply to all showing references, such as *Find and Replace*. These commands allow you to control which references show precisely.
Show All References	This restores all references to showing status if you have previously used either the *Hide Selected References* or *Show Selected References* command.
Hide Selected References	This will hide the selected references.
Show Selected References	This will show only the selected references and hide all other references in the window.
Record Summary	This provides information about the metadata of the selected reference, such as which custom and smart groups it belongs to, how many times it has been cited in the Web of Science (if it came from the Web of Science), when it was added to the library, and when it was last updated.
Find Duplicates	This searches for duplicates within the selected group. To look for duplicates in the whole library, select the *All References* group. By default, EndNote will compare the *Author, Year, Title,* and *Reference Type* fields for records to find duplicates. You can change the fields used in the preferences.
Restore to Library	If you select a reference in the *Trash*, this command allows you to restore it to the library. Custom group information will not be restored.

Feature or Menu Item	What It Does
The References Menu	
Resolve Sync Conflicts	Sometimes a synced or shared library might have multiple changes made to the same record by more than one person or on more than one computer, and this can cause a conflict. This command will allow you to choose which version of the record you want to keep.
Empty Trash	This command permanently deletes all the references in the Trash. References cannot be restored to the library after emptying the trash.

Feature or Menu Item	What It Does
The Groups Menu	
Create Group	This creates a custom group. Custom groups are not based on a search; the user must assign each reference to the group manually.
Create Smart Group	This creates a group based on a search of the EndNote library. Because it is based on a search that is constantly updated, you cannot manually add references to, nor remove them from, a smart group.
Create from Groups	This creates a combination group that draws references from other groups, based on the selection of groups. For example, in the EndNote sample library, the Corvids & Parrots group is a combination group, showing only references that appear in both the Corvids and the Parrots groups. You cannot manually add references to, nor remove them from, a combination group.
Add References To	This creates custom groups "on-the-fly" from selected references, or can add selected references to an existing custom group.
Create Group Set	References are organized in groups, and groups are organized in group sets. Group sets can be moved up or down in the *Groups Panel,* while groups within a group set are always in alphabetical order. Group sets can be expanded or collapsed to show or hide the groups within them. If you use group sets for your major projects, you can show your current projects at the top of your *Groups Panel*.
Hide Groups	This hides the *Groups Panel*.

Feature or Menu Item	What It Does
The Tools Menu	
Search Library	If the Search Panel is hidden, this command opens it to allow advanced searches. The Search Panel is resizable.
Spell Check	This spell checks the selected or open record. Only one record can be spell checked at a time.
Cite While You Write [CWYW]	This command provides access to the *Cite While You Write* (CWYW) commands available directly from the EndNote application. More CWYW commands are available when working in the word processor.
Online Search	This command brings up a list of installed online search files. If working in *Local Library* mode, it will also switch the display to *Online Search* mode.
Format Paper	EndNote is not limited to *Cite While You Write* for formatting bibliographies in documents. The *Format Paper* command allows EndNote to be used with any application that can create a rich text format (RTF) document.
Change/Move/Copy Fields	This command makes changes to all showing references at once. For example, you could add a project number to an entire set of newly imported references. Always back up your library before using this command because there is no way to undo the change if you make a mistake.
Sync	This command synchronizes all the references, groups, and attachments in a library between desktop and online libraries. Once a library has been synced, it can be synced to a second computer or shared with other EndNote users. Please note that an empty library should be used for the first sync on the second computer to avoid duplicates. Although all group information is synced and will appear on a second computer or when the library is shared, only the custom groups will appear online or in the iPad app.
Term Lists	Term lists can be used to enter information in associated fields consistently, for searching (press Ctrl-1 on Windows or Command-1 on Macintosh to bring up the list associated with a search field), or to make journal names appear consistently in the bibliography, either all abbreviations or all full names. EndNote libraries include three standard term lists, *Authors, Keywords,* and *Journals,* but users can create their own custom term lists and attach them to chosen fields.
Open Term Lists	This opens an existing term list.
Define Term Lists	This creates a new term list. For example, you could create a term list for publishers.

Feature or Menu Item	What It Does
The Tools Menu	
Link Term Lists	This links an existing term list to fields of your choice. So after creating your term list for publishers (above), this command could link that new list to the Publisher field.
Sort Library	This allows detailed sorting of the library by up to five fields, as well as an option to choose the language rules for sorting if you want to override your operating system's sort order. Each field can be sorted in ascending (A to Z) or descending (Z to A) order.
Recover Library	EndNote libraries can become corrupted. Common causes of corruption are putting an EndNote library on a network drive or in a syncing folder. If your library has been corrupted, it may be possible to save it, or part of it, using this command. Close the library in EndNote before using this command. It will not overwrite your original library; it will create a new library with "-saved" added to the library name.
Find Broken Attachment Links	If EndNote cannot find an attachment in the location the link says it should be located, there is a broken attachment link. Perhaps the file was renamed manually in the operating system, so it no longer matches the EndNote information for it, or somebody sent you a .enl file instead of a compressed library, so all their attachment links lead nowhere on your computer. This command will help you identify such broken links in your library. You can then delete the link and reattach the file. (Note, don't move .enl files without their matching .data folders, don't send people .enl files instead of compressed libraries, and don't make changes inside the library .data folder to avoid corruption and broken links.)
Library Summary	This provides metadata about the library as a whole. Information includes when the library was last saved, the location, the number of reference types used, the number of records, custom groups, smart groups, and more.
Subject Bibliography	This command creates detailed bibliographies organized by subheadings. For example, you could create an independent bibliography showing all the keywords in your library as subheadings, with the references containing those keywords under each subheading. References would repeat in the list for each subheading they match. (Note that this is different than the subheading feature in CWYW. In CWYW, a reference can only appear below one subheading, in a subject bibliography it would appear under each subheading that applied.)

3 Taking Care of Your EndNote Library and Documents

EndNote can do a lot for you, making your life much easier in the long run, but like many wonderful things it requires some care. Below are some tips to safeguard your EndNote library and documents created with EndNote.

- Never put EndNote libraries on network drives. EndNote libraries should always be kept on the user's hard drive. If your company normally requires you to keep documents in a personal folder on the network, that's a network drive and could cause corruption of the EndNote library.

- If absolutely necessary, a *read-only copy* of an EndNote library could be put on a network drive for more than one person to access, but it must be a copy of the library. The original must be kept on the owner's hard drive. Note that all files in the library must be read-only, not just the .enl file. Multiple users can access a read-only copy on a network drive, but they cannot make changes to the library.

- Never put EndNote libraries in any type of syncing drive or folder, they cause corruption over time. This includes cloud-syncing folders such as OneDrive, OneDrive Business, Dropbox, Google Drive, iCloud, SugarSync, Box, etc., as well as local network syncing programs such as GoodSync. EndNote libraries contain multiple files, and data is saved to those files in a strict sequence. Non-EndNote syncing programs can send data out of sequence, eventually leading to data corruption. Files may appear to be fine for months, but corruption is building up and will eventually cause problems. We suggest using *EndNote Sync* if you want your references available on more than one computer.

- Back up your EndNote libraries frequently. The *File➔Compressed Library* command will let you create backups for most libraries in minutes. Adding the date to the default compressed library name will let you easily find older backups that can be deleted.

- Every EndNote library is made up of two parts, the .enl file and the .data folder. Always keep them together.

- Microsoft Word documents with EndNote citations contain field codes, and these codes can be corrupted. These codes are often shaded in gray when selected. Always save Word documents as Word documents. Saving a Word document in another format, such as an OpenOffice (.odt) format can cause corruption or erasure of the codes. Opening a Word document in another word-processing program and saving it from that program will also cause corruption of the EndNote codes, even if it is saved as a Word document. The other programs do not properly save the EndNote codes, and so cause corruption. If you must move a Word document with EndNote citations between word-processing programs, convert the citations to unformatted citations first and save the new document with a different name. Unformatted citations are plain text and cannot be corrupted.

- Do not use the EndNote record number as a permanent identification number; it is not one. The record number will change when the library is synced or shared, if a record is copied from one library to another, or even if a record is cut and pasted back into the same library. Once a record number has been used in a library, it can never be used again in that library. The program controls how numbers are assigned and cannot be overridden. If you must assign permanent ID numbers to records in an EndNote library, we suggest using the Label field and assigning them manually. In short, EndNote record numbers on the desktop are temporary and subject to change under many circumstances; EndNote online does not use record numbers at all.