



EndNote on Windows: Class Notes

EndNote Training

1 After the Class

1.1 The Little EndNote How-To Book

[The Little EndNote How-To Book](#) is a reference ebook with detailed instructions and screenshots on how to do many things with EndNote. There are screenshots for both the Windows and Macintosh versions of EndNote. Please note that it is not designed for print, having color screenshots and internal hyperlinks. The PDF can be read on computers or most tablets.

1.2 EndNote Menus Reference Guide

The [EndNote Menus Reference Guide](#) explains what the menu items actually do in EndNote. This is also a reference ebook and not a tutorial.

1.3 Video Tutorials

We have videos available in several formats to help you learn the program.

- Our YouTube channel at www.youtube.com/endnotetraining has videos with closed captions for the current and recent versions of EndNote.
- There are downloadable videos on the [EndNote LibGuide](#).

1.4 The EndNote Guided Tour

If you would like a written step-by-step tutorial in using the basic features of EndNote, you can download the [EndNote Guided Tour](#). Note that the Guided Tour and live classes do not include all the same content.

1.5 Technical Support

[Technical Support](#) is free and is available Monday–Friday, 9 a.m. to 8 p.m., U.S. Eastern time. You can reach technical support through contact forms on our web site. You can find telephone numbers for contacting technical support [here](#).

1.6 Safety Note

Never store an EndNote library in a cloud-syncing system such as Dropbox, SugarSync, Box, Google Drive, OneDrive, SharePoint, or any similar services. These services will **corrupt your EndNote library**. EndNote Sync is the only recommended method of synchronizing references between multiple computers.

We have also seen corruption caused by storing an EndNote library with read-write access on a network drive or by storing a library on flash drive and strongly suggest not doing this.

2 Online Search: Searching an Online Database from within EndNote

Click the middle button of the mode buttons (shown below), showing the globe, to enter Online Search mode.



- In the Groups panel on the left, select the online search file you want to use from the favorites list or click on *more...*, which will bring up a list of all installed online search files. Select the database you want to search from the list. (Notes: You can do a custom installation of EndNote to install more online search files or download them from our web site. Online search files are sometimes called “connection files” in EndNote. See [The Little EndNote How-To Book](#) for instructions on performing a custom installation.)
- Using Online Search mode, references from an online search are retrieved into a temporary EndNote library so you can preview them. After searching, references you wish to keep can be copied to a permanent EndNote library using the *Copy References to* command on the *References* menu or the *Copy to Local Library* button (shown below) on the EndNote toolbar.



Note regarding PubMed searches: When you search PubMed using a browser at the PubMed web site, PubMed will use [Automatic Term Mapping](#) to match search terms. For example, a search for “heart attack” would also include records where the words “heart attack” did not appear but “myocardial infarct” did appear. When using EndNote’s Online Search to search for “heart attack,” only records containing those exact words will be found. This means there may be significant differences in the number of results when searching all fields through online search (<10,000 for heart attack) versus the PubMed web site (>200,000 for heart attack), depending on the search terms used.

3 Groups

Groups organize your references by categories, allowing you to have one large library for all your references while also being able to work with smaller groups of references easily.

- Groups are organized under group sets, and references are organized in groups.
- You can have up to 5,000 groups per library.
- You can have up to 5,000 group sets per library. Group sets will appear in bold.
- The same reference can be in multiple groups. The references are not duplicated, only assigned to multiple categories.



Custom groups: You manually add records to a custom group. To create a custom group, select **Create Group** from the **Groups** menu.



Smart groups are based on a search. Records are updated automatically by matching the group's search criteria. To create a smart group, select **Create Smart Group** from the **Groups** menu.



Combination groups are created by combining other groups. To create a combination group, select **Create from Groups** from the **Groups** menu.

4 Direct Export

The exact steps for using direct export will vary with the publisher providing your data and the browser you are using. Although many publishers support direct export, the Web of Science and PubMed databases will be used as examples for the class.

Details in differences with direct export in different browsers are covered in [The Little EndNote How-To Book](#).

4.1 Web of Science

- Open your EndNote library.
- Perform your search of the Web of Science in your browser. (Note: Limiting your search to the Web of Science Core Collection will give you the option to export more fields, including the keywords and author address.)
- Mark the references to export. You can export up to 500 references in a batch.
- From the drop-down list showing *Save to EndNote online* in the first line, select the option to **Save to EndNote desktop**.
- In the resulting **Send to EndNote** window, select **Full Record** if you were searching the Web of Science Core Collection, or **Author, Title, Source, Abstract** if you were searching other databases in the Web of Science.
- You may be asked what you want to do with the file. Select the option to open it with EndNote.
- The references will be imported into the open library.
- The references will be displayed in the temporary *Imported References* group.

4.2 PubMed

- Open your EndNote Library.
- In your browser, perform your search of PubMed.
- Mark your selected references.
- You can export the references directly from the search results or add the references to the PubMed clipboard and then export them from the clipboard.

- Click the *Send to* button and select *Citation manager*.
- Select the number of references to export in each batch from the *Number to send* drop-down list. You can export up to 200 references in a batch.
- If you are exporting multiple batches, select the starting number for the current batch in the *Start from citation* field.
- Click the *Create File* button to begin the export.
- You may be asked what you want to do with the file. Select the option to open it with EndNote.
- The references will be imported into the open library.
- The references will be displayed in the temporary *Imported References* group.

5 Working with PDFs

5.1 Setting Preferences for PDFs (Optional)

5.1.1 PDF Handling Preferences

- To edit the preferences, select *Preferences* from the *Edit* menu.
- Select the *PDF Handling* option at the left of the window.
- Set your preferred *PDF Auto Renaming Options* for imported PDFs. Note that when a PDF is renamed, the new name will be based on the contents of the EndNote record, not on the contents of the PDF; if you attach a new PDF to a record that is not the original article, it would also be renamed based on the contents of the fields set in the renaming options.
- Use the *PDF Auto Import Folder* to select a folder EndNote will watch for new PDFs. Any PDF added to that folder will be automatically imported into EndNote.

5.1.2 Find Full Text Preferences

- To edit the preferences, select *Preferences* from the *Edit* menu.
- Select the *Find Full Text* option at the left of the window.
- The *Web of Science Full Text Links* and *DOI* options should always be marked.
- Mark the box for *PubMed LinkOut* if you are in medicine or the biosciences and your organization is using PubMed LinkOut.
- If your school or organization has an OpenURL server, enter that server's URL in the *OpenURL Path* field. You will need to consult with your library web site or librarian to learn what this URL is because every school or organization will have a different one. An OpenURL server may be called a "link resolver" or SFX server.
- If there is an authentication page that is used with your OpenURL server, enter it in the *Authenticate with URL* field. This will allow you to authenticate from within EndNote instead of having to open a browser window for authentication.

Please note that OpenURL is *not* a proxy server or VPN. It is an Internet protocol for managing digital subscriptions. In many cases, you will still need to be IP-authenticated to access full text through OpenURL. This means you will need to be on-campus or connected to the campus through VPN with IP-authentication. Not all VPN includes IP-authentication, so check with your library or technical support department to find out if yours does.

5.2 Importing PDFs

EndNote can import PDF files containing a Digital Object Identifier (DOI) in the metadata or the first two pages of the PDF. EndNote sends the DOI to PubMed and CrossRef, online databases capable of looking up reference data by DOI. The online databases send back the bibliographic information, EndNote imports it, then attaches the PDF to the record created. This means the PDF must have a DOI for good results, and EndNote must have access to the Internet during the import.

When importing PDFs, EndNote is importing PDFs you already have on your computer. EndNote cannot import PDFs that are stored online.

- Select *Import* from the *File* menu.
- Select *File* to import a single PDF, or *Folder* to import a folder containing PDFs.
- Click the *Choose* button to select the file or folder to import.
- *PDF* must be selected as the *Import Option*.
- Click on the *Import* button to begin the import.

5.3 Find Full Text

EndNote's Find Full Text feature will search the Internet for PDFs, download them, and attach the full-text PDFs to selected references.

- Select (highlight) the references you want to find the matching PDF for.
- Select *Find Full Text* from the *References* menu, then *Find Full Text* again at the right.
- OR click on the *Find Full Text* button  in the toolbar.

Please note that not all PDFs your school is entitled to may be downloaded. If a PDF is not downloaded, you may be able to use the *References* → *URL* → *OpenURL Link* command to send information about a selected record to your OpenURL server individually, then download the PDF and drag it into the EndNote record to attach it.

6 Finding Duplicates

- Select the *All References* group to search the entire library for duplicates.
- Click on any reference in the list of references to make the list the active window in EndNote.
- Select *Find Duplicates* from the *References* menu. By default, EndNote will compare the *Author*, *Year*, *Title*, and *Reference Type* fields to determine if a reference is a duplicate.
- You will be presented with the first set of duplicates found, with fields that have differences highlighted. You can copy and paste text between the two references shown, then select the

version of the reference you want to keep. EndNote will then present the next set of duplicate references. Please note that you can copy text between the windows, but not attachments.

- If you simply want to delete all the newest references, click the **Cancel** button to close the comparison window. All the newer references will be highlighted. Select **Clear** from the **Edit** menu to send all selected (highlighted) references to the trash.

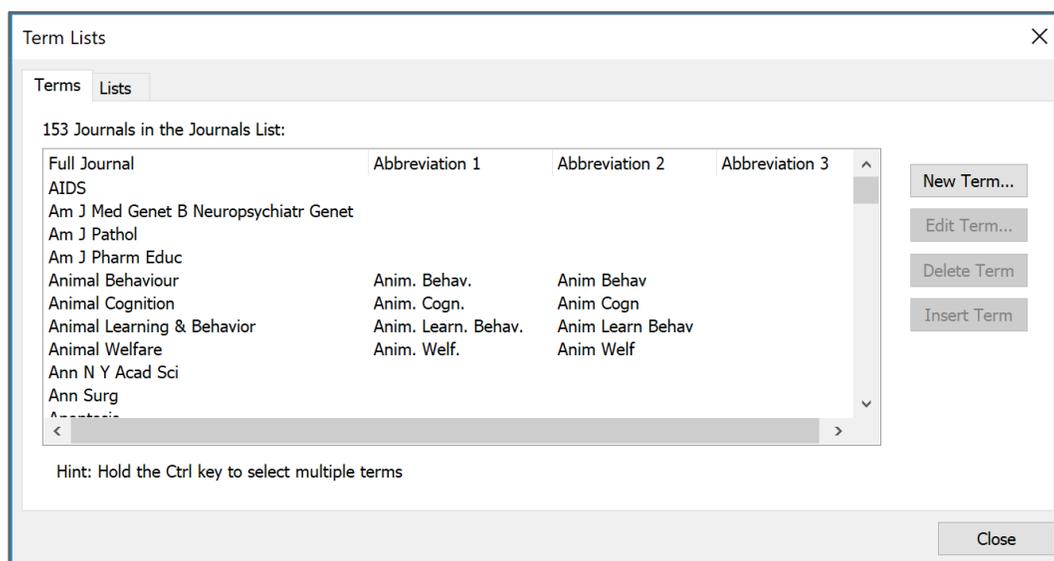
Note that you should use the side-by-side comparison method for removing duplicates **OR** hit the **Cancel** button to select references to send to the trash. Trying to mix the methods for the same duplicates search could result in accidentally deleting both an original and duplicate reference. If you want to change methods for duplicate removal, run the search for duplicates again.

7 Journal Names

Some journals require the journal's name to be spelled out in full while others require a standardized abbreviation. Some disciplines may even have multiple versions of the standardized abbreviation, such as one with periods after abbreviated words and one without periods. EndNote can substitute one version of a journal's name for another in the formatted bibliography without having to edit each record, to match the journal's style.

You must set up a journals term list for your EndNote library to use this feature.

- In EndNote, select **Tools** → **Open Term Lists** → **Journals Term List**. Resize the window so that you can see the columns as in the example below.



As references are added to EndNote, the contents of the *Journal* field are added to the *Full Journal* column in the term list while the contents of the *Alternate Journal* field are added to the *Abbreviation 1* column. If there is only one version of the standardized abbreviation and the full journal, everything you need in this table will be filled in so long as each record entered in the EndNote library contains the full journal name in the *Journal* field and the standardized abbreviation in the *Alternate Journal* field. In reality, this is seldom the case and you are likely to see journal names in the wrong column, as shown above. However, it is possible to manually enter the information in the term list or, better yet, to import a list of the full names and abbreviation(s) from a tab-delimited file.

EndNote ships with several predefined tab-delimited files containing full names and standardized abbreviations, including those for the humanities, chemistry, law, biosciences, and medicine. These lists can be imported into EndNote to create a working journals term list. To do this—

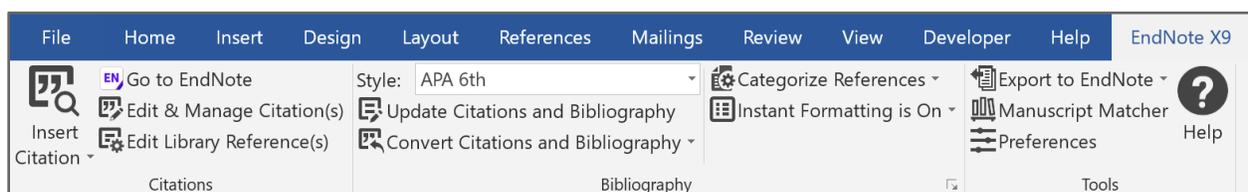
- If you have not already done so, open the Journals term list (*Tools*→*Open Term List*→*Journals Term List*).
- If there are journals already present, delete them by selecting all the journals present, then clicking the *Delete Term* button. This will ensure that you have no “orphan” journals without complete information or with abbreviations in the *Full Journal* column.
- Click the *Lists* tab.
- Click *Import List*.
- Locate and double-click on the tab-delimited file you wish to import. The predefined lists that ship with EndNote will be found in the *Terms Lists* folder within the *EndNote* folder (\\Program Files (x86)\EndNote X8\Terms Lists). The complete list will be imported. (Note that the journal term lists are simply tab-delimited files. It is also possible to create your own custom term lists.)
- Close the *Term Lists* dialog. EndNote will now be able to substitute the version of the name set in the style in the formatted bibliography.

8 Cite While You Write in Microsoft Word

8.1 Installing the Cite While You Write Tools for Word on Windows

When you install EndNote, it will automatically install files into a common program folder, allowing EndNote and Word to communicate and enabling *Cite While You Write* (CWYW) in Word.

In Word, you will see a tab on the ribbon similar to the screenshot below.



8.2 Using the Cite While You Write Tools in Word

Below is information about the most-used *Cite While You Write* tools. These are the tools you would use daily. See the EndNote *Help* files for information on the remaining *Cite While You Write* tools.

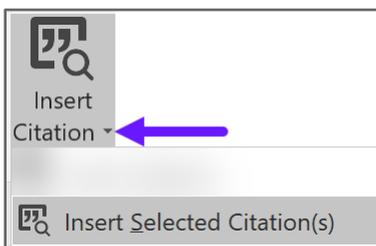
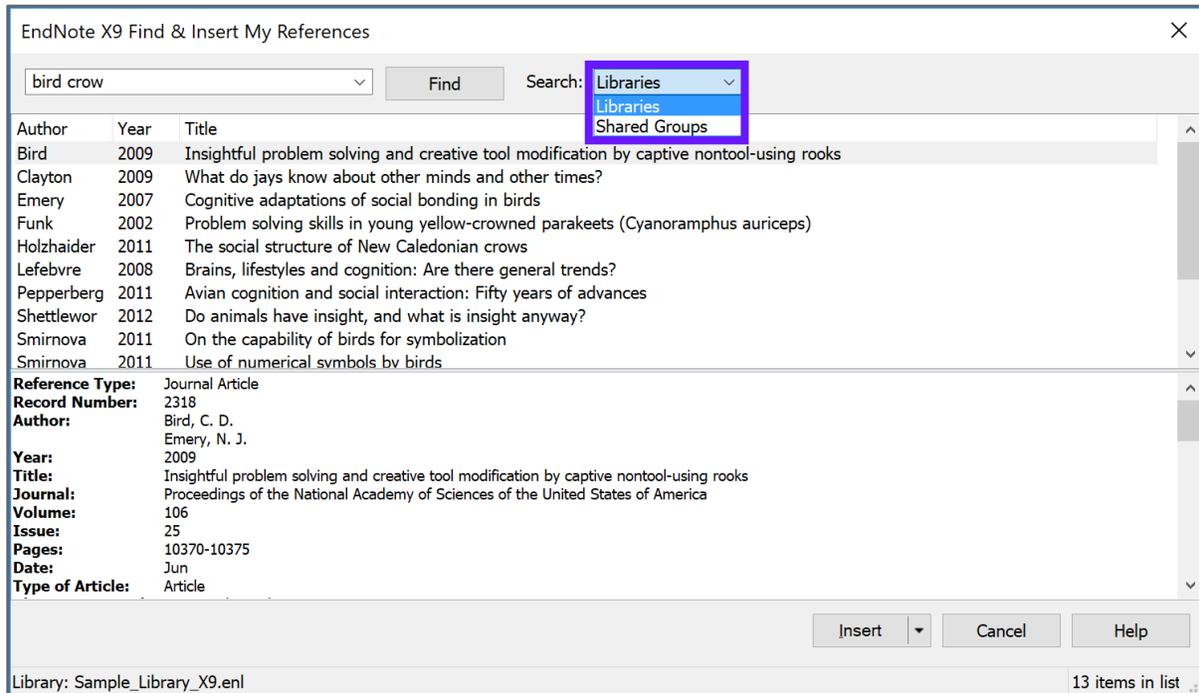
8.2.1 Go to EndNote **Go to EndNote**

This command will take you to the EndNote program, where you can select (highlight) references for insertion into your Word document.



8.2.2 Insert Citation(s)

This command will provide a search window where you can enter text that is in any text field of the EndNote record you want to find. You can then select references from a list of those that contain your search terms, as shown below, and insert them into your paper. With EndNote X9 you can choose to search your open EndNote libraries or groups shared with you using a drop-down list. (Note: For Windows, click on the top part of the button to activate it.)

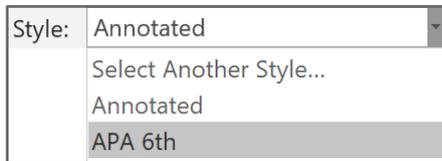


8.2.3



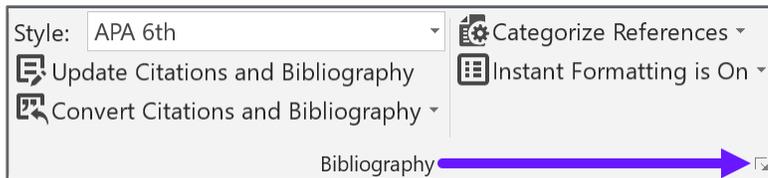
Insert Selected Citation(s)

This command will insert the references that are selected (highlighted) in EndNote into your document at the location of the Word cursor. Both buttons shown above activate this command; the one at the left is found in Word, the one at the right is found in EndNote. (Note: For Windows, click on the bottom part of the Insert Citation button to activate the list of commands available.)



8.2.4 Style

If you just want to change the style without changing any of the other formatting options (such as font or line spacing), the Style drop-down list will allow you to do so.

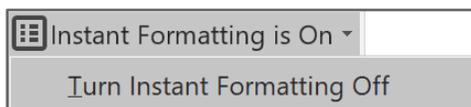


8.2.5 Configure Bibliography

This command will allow you to change the EndNote style used for your document. It will also let you make other changes to the layout of your bibliography, such as adding a heading, changing the font for the bibliography, or changing the line spacing.

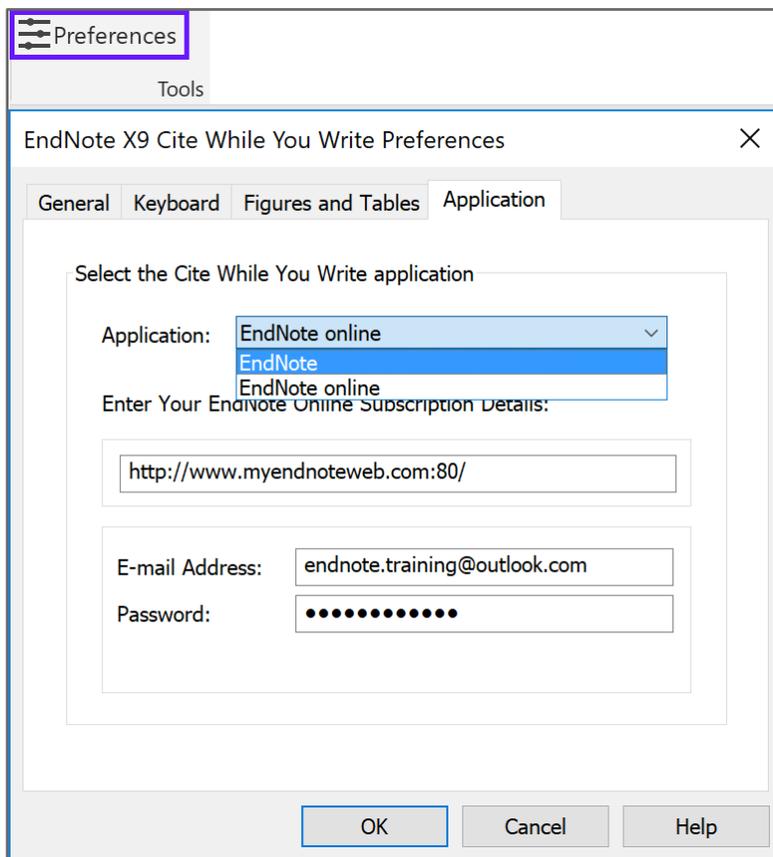
8.2.6 Edit & Manage Citation(s)

Use this command to make any changes inside a citation, such as adding page numbers or removing author names from author-date citations.



8.2.7 Instant Formatting

Instant formatting provides a constant updating of all citations and the bibliography. However, there may be times when it is helpful to turn off this constant updating, such as when you are moving large amounts of text in the document and want EndNote to wait until all the text is in its final location before formatting. This command turns instant formatting on or off for the current document. (Note: Turning instant formatting off for future new documents can be done in the CWYW preferences.)



8.2.8

Cite While You Write Preferences

The Application tab for this command will let you toggle between using the EndNote desktop or online commands and libraries for *Cite While You Write*. See section [9.3](#) for information on sharing custom groups through EndNote basic/online or EndNote X9.

9 EndNote Online

EndNote is a reference management solution with both desktop and online components. When used on the desktop, it may be called “EndNote,” “EndNote desktop,” or “EndNote on the desktop.” When used online, it may be called “EndNote online.” These names do not mean the desktop and online components are separate products, but only that the EndNote product is being used in either the desktop or online environment at that time.

9.1 EndNote Sync

EndNote can synchronize an unlimited number of references and 5,000 groups between an EndNote online and desktop library. References can also be synchronized to a second desktop computer and/or an EndNote iPad library ([EndNote for the iPad is available in the iTunes store](#)). For the first synchronization on any device, there are several important considerations.

- For the first synchronization on any device, ALL references and groups will be copied in both directions. This will result in duplicates if the same references reside on the device and EndNote online.

- All references and groups will be synchronized, but group sets, smart groups, and combination groups (group from groups) will not be displayed in your online library. Therefore, if two custom groups in an EndNote desktop library have the same name, but are under different group sets, they will have the same name in EndNote online, but will have no group set to distinguish them. Consider adding prefixes representing group sets to custom group names to more easily tell them apart in EndNote online before your first synchronization and to keep groups from the same group set together; online groups will be sorted alphabetically.
- If you synchronize to a second or third computer, all groups and group sets will appear on the second computer. It is best to sync to an empty library on the second computer.
- Only one EndNote library on a device and one EndNote online account can be synchronized and shared.
- *Make frequent backups of your EndNote desktop library, and make a backup before your first synchronization, by selecting **Compressed Library** from the **File** menu.* This provides a backup in case you have problems. EndNote will prompt you to create a backup, but this command can be used to create a backup of your library at any time. This backup will have a *.enlx* extension. Any compressed library created after your first synchronization will contain synchronization information, so you want to make a backup before your first sync.
- *Syncing is not a backup system.* If you delete references or attachments from one library, they will be deleted from the other synchronized libraries with the next sync. Technical support will not be able to restore references you have deleted and then synced, so making frequent backups of your desktop library is advised.
- Synchronization will always be of the complete library. There is no selective sync.
- To begin syncing, click the  Sync button, then follow the menus to create an EndNote online account or sign in to an existing account. It may take a very long time to sync a large library the first time, so please be patient.
- If you already have a Web of Science account, use the same logon when creating your EndNote online library, to allow enhanced functionality between them.

9.2 Sharing EndNote Libraries (Optional)

9.2.1 The Basics

Users of EndNote X7.2 or later can share their entire library, with simultaneous access to all references and attachments, with other EndNote X7.2 or later users. The basic requirements and information for sharing are—

- EndNote X9 users can share their library with up to 100 other EndNote users. The owner of the library assigns Read & Write or Read Only permissions to each member of the sharing group, individually.
- EndNote X8 users can share their library with up to 100 other EndNote users. All users have full Read & Write access to the library.
- EndNote X7 users can share their library with up to 14 other EndNote users. All users have full Read & Write access to the library.

- EndNote X8 and X9 users will see an Activity Feed (see section [9.2.4](#)); EndNote X7 users will not see an Activity Feed.
- All EndNote X7 users must be using X7.2 or later and must have begun syncing their EndNote library between the desktop and online before January 1, 2018. It is not possible to link an EndNote X7 library to an EndNote online account after that date.
- All users must sync their EndNote desktop and online libraries. The sharing process works through EndNote Sync.
- Although there are limits on the number of other users a library owner can share with, a “sharee”¹ can have an unlimited number of libraries shared with them.
- Because the entire library is synced to all recipients, with attachments, the library will take up as much space on the sharee’s computer as it does on the owner’s computer and can be used off-line. However, the library can only be accessed through the **File**→**Open Shared Library** command.
- Depending on the version of EndNote and the settings for each sharee, sharees may have full Read & Write access to the library; those sharees could add, change, or delete references and attachments. We suggest the owner make frequent backups of their library using the **File**→**Compressed Library** command.

9.2.2 How to Share an EndNote Library

- Sync your EndNote library.
- In your synced library, click the **Share Library** button: .
- Enter the email address of the person you want to invite to the shared library, select the access permissions you want them to have, then click the **Invite** button. The email address does not need to be the one the invitee uses for their EndNote online account.
- The invitee’s name will be added to the list at the top of the dialog with a *Pending* status to show they have not yet accepted the invitation. If you want to send a reminder of the invitation, change their permissions, or remove them from the list, you can do that at any time.
- The invitee will receive an email inviting them to the shared library. They must accept the invitation to access the library. When they accept the invitation, the invitee will be directed to a special EndNote logon page, where they must logon to the EndNote online account they sync through. If they do not have an EndNote online account, they can create one on this page.

9.2.3 How to Open an EndNote Library Shared with You

- To open a library that has been shared with you in EndNote, select **File**→**Open Shared Library**.
- You will see a list of all the libraries that have been shared with you. Remember that although you can only share one library with others, an unlimited number of libraries can be shared with you. Select the shared library you want to open and click the **Open** button.
- The first time you open a shared library EndNote will create an empty library and download all the references and groups in the library, including any file attachments, to your computer. This may

¹ The word “sharee” will be used throughout this section to designate the person a library is shared with.

take some time. Subsequently when you open the shared library, EndNote will only need to check for changes since the last time it was opened.

- The shared library will look much like any other EndNote library. Note, however, that the name of the library will show the EndNote online account name of the owner and the *Share Library* button will be unavailable. You cannot share a library that you do not own with others, only the owner of a library can share it.
- Because a library shared with you will have all the references and attachments from the original library, it will take up as much space on your computer as it does on the owner's computer.

9.2.4 The Activity Feed

Every shared library includes an Activity Feed that provides library members with insight into who is making changes to the shared library. The Activity Feed is only available to EndNote X8 or X9 users but activity from all “sharees,” including those with earlier versions, will be seen in the feed.

- To view the Activity Feed, click the Activity Feed button: 
- Activity is presented in reverse chronological order. The most recent activity will be at the top.
- The Activity Feed will display sync timestamps and show the activity that took place between those timestamps.
- Some items in the Activity Feed will appear in a darker shade of grey to signify that more information about that item is available by clicking on it. For example, selecting a line that says “Bob Smith added 145 references” will display those 145 references that Bob Smith added in a temporary Search Result group.
- Up to 500 lines of activity will be shown in the Activity Feed.
- Changes to references made in EndNote online will not be displayed in the Activity Feed.

9.3 Sharing a Group in EndNote Online (Optional)

Through EndNote online you can share a single custom group with any number of people, so long as they are using EndNote basic/online. (EndNote basic is the more limited online-only version, with only 2G attachment storage, and applies to the free version and the version available with the Web of Science.) Attachments are never shared when sharing groups through EndNote online.

9.3.1 From the Online Interface

- Select *Manage My Groups* on the *Organize* tab in EndNote online.
- Mark the *Share* box for the group you want to share. You will see an icon with two people appear to the left of any shared group.
- Click the *Manage Sharing* button for your shared group to begin sharing it with others.
- Click the *Start sharing this group* link.
- Add the email address(es) for those you want to share the group with, with each email address on a separate line. This must be the email address they are using for their own EndNote online/basic account. You cannot share a group with somebody who is not using EndNote online/basic.

- Select the access rights you want to give this person.
 - *Read only* access will allow them to view your references, copy your references into their own EndNote online library, or use your references in Microsoft Word, but it will not allow them to edit your references.
 - *Read & Write* access will allow them to view your references, copy your references into their own EndNote online library, or use your references in Microsoft Word, and it will also allow them to edit your references, add new references, and delete your references. Changes made to your references by others with Read & Write access will also be synchronized back to your EndNote desktop library if you are synchronizing your libraries.
- Click on the **Apply** button to save the options, then the **Close window** link.

9.3.2 From EndNote X9

To share groups from EndNote X9, you must first be syncing your desktop and online libraries. Only custom groups in the library you are syncing can be shared.

- Select the custom group you want to share, then select **Share Group** from the **Groups** menu.
- Enter the email address the person you want to share with is using for their EndNote basic/online account.
- Select the permissions settings you want to give, either *Read & Write* or *Read Only*. They will not be given access to your attachments, no matter which permission level you choose.
- Add a message, if you wish.
- Click the **Invite** button.

Your colleague will be able to show your group in their EndNote online library and, if they are syncing their desktop and online libraries in EndNote X9, they will be able to see your group listed under *Groups Shared by Others* in EndNote X9. Your references will not show in the EndNote X9 library, but they can use the group name as a shortcut to EndNote online.

10 Supplementary Material (Not Included in Class, but Useful)

10.1 Manually Entering References in EndNote on the Desktop

Although EndNote can import from hundreds of online databases, not everything is available online. Sometimes you must type the references in manually. Sometimes the data you import may have problems, such as an author's name not showing up correctly because that author is an organization or known by a title instead of a first and last name (for example, "Sitting Bull" was a title for a great Native American chief, not a first and last name). This section will help you manually enter references, correct references that had problems during the import, and show you how the special fields work.

Select **New Reference** from the **References** menu to create a new record.

10.1.1 Selecting the Reference Type

Select the reference type from the drop-down *Reference Type* list at the top of the empty record. Note that field names may change, depending on the reference type.

10.1.2 Entering Data

Do not format the data as you enter it if the formatting would apply to the entire field. For example, do not italicize or bold author names or journal names. If formatting applies to only some words or characters in a field, then you can apply that special formatting using the formatting toolbar.

You can copy-and-paste data into most fields.

You do not need to enter data in every field. Enter the data that you require for your bibliography or that you wish to track.

10.1.3 Special Fields

- Authors:** Author names can be entered either first-and-middle name and then last (family) name (e.g., John Robert Smith); or they can be entered last name, then a comma, then the first-and-middle name (e.g., Smith, John Robert). Each author must be on a separate line. Add corporate authors or authors where the “name” is a title with a comma at the end of their name (e.g., *University of California*, or *Sitting Bull*, without the italics). If you use a name that has been used before in the library, EndNote will try to match it for you.
- Year:** This is not a true date field. It is an alphanumeric sorting field. Enter four-digit years. You can also enter text such as “unpublished” or “in press.”
- Journal:** Enter the journal name. EndNote will try to match what you are typing, just as it does author names. Use the full journal name if you are using a journals term list.
- Pages:** Pages can be entered as a full range of pages (e.g., 125-128) or as a truncated range (e.g., 125-8). EndNote will convert the format entered to the format required in the style. An en-dash (–) can be used between numbers instead of a hyphen, if preferred, but must be entered manually. References imported from online databases will have hyphens, not en-dashes.
- Start Page:** This field is used in the Harvard Bluebook style. If you are not in legal studies, you probably do not need to enter it.
- Date:** This is not a true date field. It is a text field and will be shown in your bibliography exactly as entered. Do not include the year in this field; it would be duplicated because the year data will be pulled from the Year field.
- Short Title:** If a full-reference footnote style calls for a shortened version of the title in repeated citations, that information will be pulled from the short title field. This field is generally used only in the humanities. Some new variations of humanities style call for the short title to be used in all citations, not just repeated citations, with the full title used only in the bibliography.
- Alternate Journal:** This field is used for the abbreviation of the journal name if you are using the journals term list for journal name substitution. See section [7](#) for information on using a journal term list.

- Keywords:** Enter keywords with a line break (¶), a semicolon (;), or a backslash (\) between each keyword. Do not use a comma (,) or a slash (/) to separate keywords. The comma and slash are used within keyword phrases by online databases, so EndNote ignores them as keyword separators.
- URL:** You can copy and paste a URL into this field or type it in manually.
- File Attachments:** You can attach files or insert links to files on your network or hard drive by selecting **File Attachments**, then **Attach File**, from the **References** menu. The default in EndNote is to attach the file to the record so that it travels with your library. You can change this default on a case-by-case basis during file selection by unmarking the box at the bottom left of the file selection window called *Copy this file to the default file attachment folder and create a relative link*. You can also change the default option in the preferences.
- Note that only attached files can be synced to an EndNote online library and shared. This means if you want PDFs to sync, they need to be attached to the records, not just linked.
- You can also attach files by dragging them onto a record in the reference list, or by dragging them into an open record.
- Figure:** This is another way of attaching a file and is normally only used in one of the three reference types devoted to tracking information about your graphics. The three types are 1) Chart or Table, 2) Equation, and 3) Figure. To insert a graphic file, select **References** → **Figure** → **Attach Figure**, then click the **Choose File** button. Locate the file you want to attach in the *Figure* field and double-click on it. If the file inserted is a picture you will see a thumbnail image of the picture; if it is an object you will see an icon for the object's file type. There can be only one file in the *Figure* field per record.
- Caption:** This field is tied to the *Figure* field. When the image is inserted into a Word document, the contents of the *Caption* field will be used as the caption for the image in Word. If the reference type *Chart or Table* is used, the graphic will be inserted in Word as a table; if any other reference type is used, it will be inserted as a figure.

10.2 How to Enter Author Names in EndNote

- Each author must be on a separate line.
- If there is no comma in the name, EndNote will use the last word on the line as the last name.
- If there are commas, anything before the first comma is the author's last name, anything after a second comma is a suffix, and anything between a first and second comma is the author's first and middle names.
- A second comma should be used only when there is a suffix or an internal comma in an institutional name.

Name Entered as (Names in green are formatted correctly)	Formatted According to AMA	Formatted According to APA	Formatted According to Chicago (For first author in bibliography)
<i>Personal Names without Suffixes</i>			
John R. Smith	Smith JR	Smith, J. R.	Smith, John R.
J. R. Smith	Smith JR	Smith, J. R.	Smith, J. R.
Smith, John R.	Smith JR	Smith, J. R.	Smith, John R.
Smith, J. R.	Smith JR	Smith, J. R.	Smith, J. R.
John R. de Young	Young JRd	Young, J. R. d.	Young, John R. de
J. R. de Young	Young JRd	Young, J. R. d.	Young, J. R. de
de Young, John R.	de Young JR	de Young, J. R.	de Young, John R.
de Young, J. R.	de Young JR	de Young, J. R.	de Young, J. R.

Name Entered as (Names in green are formatted correctly)	Formatted According to AMA	Formatted According to APA	Formatted According to Chicago (For first author in bibliography)
<i>Personal Names with Suffixes</i>			
John R. de Young, Jr.	John R. de Young J	John R. de Young, J.	John R. de Young, Jr.
John R. Smith, Jr.	John R. Smith J.	John R. Smith, J.	John R. Smith, Jr.
Smith, John R., Jr.	Smith JR, Jr.	Smith, J. R., Jr.	Smith, John R., Jr.
de Young, John R., Jr.	de Young JR, Jr.	de Young, J. R., Jr.	de Young, John R., Jr.
<i>Titles Used as Names</i>			
Sitting Bull Elizabeth I	Bull S I E	Bull, S. I, E.	Bull, Sitting I, Elizabeth
Sitting Bull, Elizabeth I,	Sitting Bull Elizabeth I	Sitting Bull Elizabeth I	Sitting Bull Elizabeth I
<i>Corporate or Institutional Names without Internal Commas</i>			
University of California	California Uo	California, U. o.	California, University of
University of California,	University of California	University of California	University of California
<i>Corporate or Institutional Names with Internal Commas</i>			
University of California, Berkeley	University of California B	University of California, B.	University of California, Berkeley
University of California,, Berkeley	University of California, Berkeley	University of California, Berkeley	University of California, Berkeley

The correct methods of input are highlighted above.