EndNote X8
Advanced Features

This guide covers how to:

1. **Install an additional EndNote Output Style**
2. **Edit an EndNote Output Style**
3. **Share your EndNote references and PDFs**
4. **Manage Journal Abbreviations**
5. **Merge citations from multiple Word documents**
6. **Create Separate bibliographies for each chapter and a master bibliography at the end of the document**

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1. Install an additional EndNote Output Style

A publisher may ask you to use a style that is not listed in the Word **Style** menu's **Select another style** list. You can see a complete, up-to-date list of all the styles available for EndNote on the EndNote website:

- Go to the EndNote website: **www.endnote.com**
- Click on the **Downloads** tab (on the horizontal menu toward the top of the screen)
- Scroll down to the heading **Output styles** and select **Add output styles**
- You can use the **Style Finder** to locate the journal or style name that you need
- Once you have found the style, click on **Download** to the right of it
- Browse to the location on your computer where you downloaded the style
- Double-click on the style file to open it
- The style should open in EndNote
- In EndNote, go to the **File** menu and select **Save as**
- Click on the **Save** button

You should then be able to select your style by going back to Word and using the drop-down **Style** menu to go to **Select another style**.

You should now be able to see your style in the list and to select it.

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2. Edit an EndNote Output Style

You may wish to edit one of the standard EndNote output styles.

For example, a journal publisher may have asked for submitting authors to use Vancouver style, but with the citations in superscript. If you need to submit to that journal, it is possible to create your own version of Vancouver and amend the citations so that they all appear in superscript.

To edit a style:

- In EndNote, go to the **Edit** menu
- Go to **Output Styles** and select **Open Style Manager**
- Locate the style you wish to edit and click to highlight it
- Click on the **Edit** button

a. Edit a citation template:

To make amendment to the appearance of the citations, click on **Templates** in the left hand pane beneath the heading **Citations**. Amendments can be made directly to the template text.
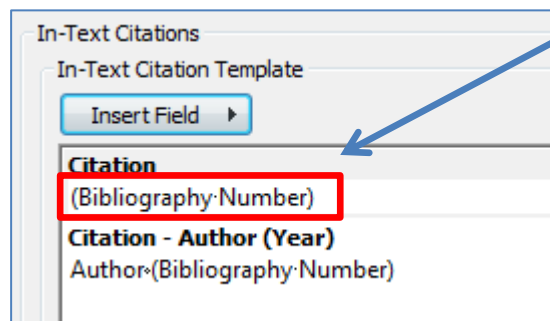
For example, to make all the citations superscript, highlight the text (Bibliography.Number) to select it and then click on the superscript button towards the top of the screen.
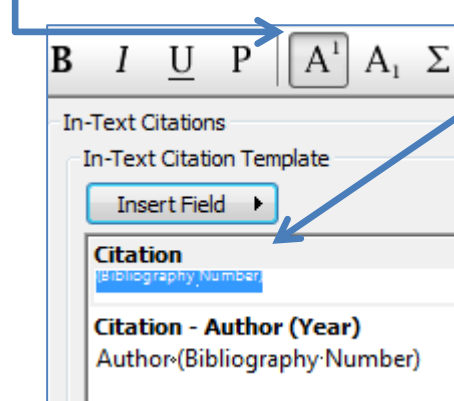
* Note: on a MAC there are no buttons to edit the text. Go to the **Edit** menu at the top of the screen and use the **Font** options to edit the text.

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To add additional fields to the citation, e.g. to add page numbers:

- Click in the citation text where you want the new field to go, e.g. after Bibliography Number, and press the space bar

Citation
(Bibliography·Number·)

- Click on **Insert Field** ▸ and select the field that you wish to insert. It will appear in the template:

Citation
(Bibliography·Number·Pages)

b. Edit a reference template:

To make amendments to the appearance of references, click on **Templates** in the left hand pane beneath the heading **Bibliography**.

Select the reference type you wish to amend, e.g. **Journal Article**. Fields can either be deleted directly, or the **Insert Field** button (at the top right of the window) can be used to insert additional fields.

E.g., if you wish to add the DOI at the end of all the journal article references in your bibliography, put your cursor at the end of the template journal article reference and press the space bar. Click on **Insert Field** and select **DOI**:

Journal Article
Author.·Title|.·Journal|.·Year|;Volume|(Issue)|:Pages|.·DOI

c. Change how authors are listed in citations and references

You can change the way that authors are listed. For example, you can decide how many authors to list, how to punctuate the list of authors, or whether to add 'et al.' at the end of the list.

- Decide whether you want to amend the author lists under the heading **Citations** or **References**
- Click on **Author Lists** under the appropriate heading
- Edit the default settings. For example, you could specify that if there are **3** or more authors, list the first **2** authors and abbreviate with **et al.**

d. Change author capitalisation styles

- Decide whether you want to amend the author lists under the heading **Citations** or **References**
- Click on **Author Name** under the appropriate heading
- Use the drop-down menus and check boxes to select the way that authors are displayed

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3. Share your EndNote references with other EndNote users

There are two ways to share your references:

- You can share your entire Desktop Library with up to 100 other EndNote Desktop users, including references, PDFs and annotations.
- Alternatively, you can share a group of references (not including PDFs) by using EndNote Web. Anyone can create a free EndNote Web account even if they do not have EndNote Desktop.
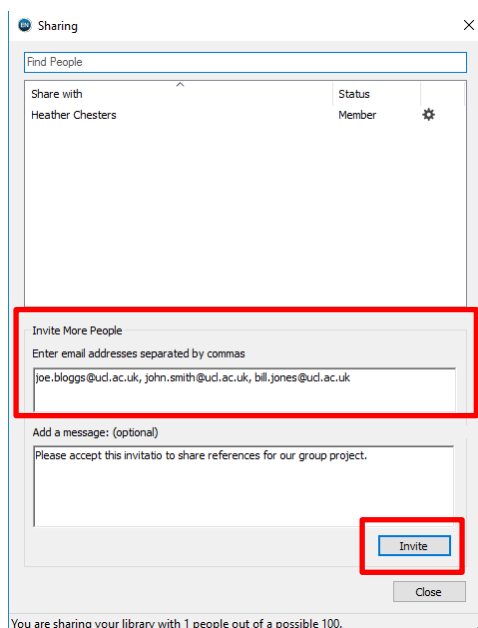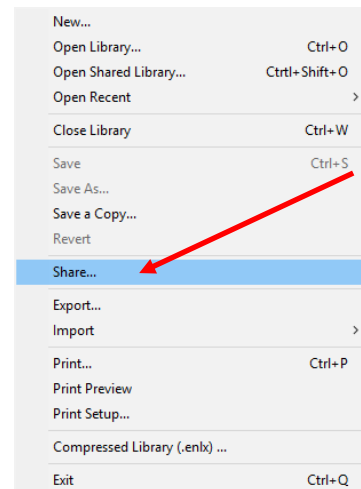
a. How to share your EndNote Desktop Library

Firstly, you will need to have an EndNote Web account. If you do not already have one:

- **Open an EndNote library** in EndNote Desktop
- Click on **Configure Sync…** in the left menu 🔄
- Click on **Sign Up** in the EndNote Login pop-up box that appears and create an account

Your EndNote Desktop Library should automatically sync with your new EndNote Web library.

- In your EndNote Desktop Library, go to the **File** menu
- Select **Share**

- Then **enter the e-mail addresses** of the people you wish to invite to share your group. (You can also add a message if you wish.)
- Click on **Invite**

Note: You can add up to 100 e-mail addresses.

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In order for sharing to work, each person that you have invited should:

- Make sure that they have EndNote Desktop **version X7.4** or above
- **Sync** their Desktop library with an EndNote Web account (see instructions to create an account above)
- **Accept the e-mail invitation** that they will receive from you
- In their EndNote Desktop library, go to the **File** menu and select **Open Shared Library**

b. How to share a Group of references in EndNote Web

- Log into your **EndNote Web** account
- Go to the **My References** tab
- **Select the references** that you want to share by checking the boxes to the left of them
- Click on the **Add to group** drop-down menu above your list of references
- Select **New group**
- Add a **name** for the group and click **OK**
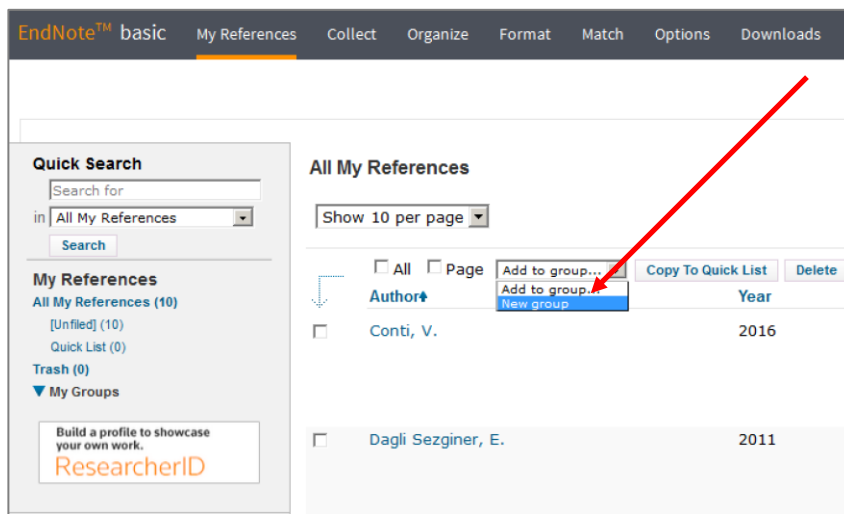
The name of your group will appear under the **My Groups** heading at the bottom of the left hand menu.

You can continue to add references to your group:

- Select some additional references
- Use the **Add to group** drop-down menu
- This time, select the name of your group and the references will be added

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To share your group:

- Go to EndNote Web's **Organize** tab
- Select **Manage My Groups**
- Tick **Share** to the left of the name of the group you want to share and click on **Manage Sharing**
- Click on the **Start sharing this group** link
- In the pop-up box, enter each e-mail address on a new line
- Select **Read & Write** if you want the other person to be able to make changes to the references in the group
- Click on **Apply**

The group will appear in the left hand menu of the other person's EndNote Web Library beneath the heading **Groups Shared by Others**

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4. Manage Journal Abbreviations

EndNote includes **Term Lists**, which you can use to manage how journal titles display in your citations and references. The Term Lists store both the full name of a journal and its abbreviated form. You can choose whether to display the full journal names or the abbreviations in your Output Style.

Term Lists are not automatically included in your EndNote Library. You need to import them each time you create a new Library.

To import a term list into EndNote:

- Go to **Tools** in your EndNote Library
- Select **Define Term Lists**
- Click on **Journals** to select this in the pop-up box
- Click on the **Import List** button
- Click on **Medical.txt** and then **Open** to import a database of nearly 15,000 medical journal names (You can repeat the process if you wish to also import journal names in a different subject area.)

To select the format for journal names in your EndNote Output Style:

- Go to **Edit**
- Go to **Output Styles** and select **Open Style Manager**
- Find and highlight your style, then click on **Edit**
- Click on the **Journal Names** heading in the left hand column
- Select either **Use full journal name**, or select one of the **Abbreviation** options
- Close the style and you will be prompted to save it. Go back to Word and select your saved style

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5. Merge citations from multiple Word documents

If you have several Word documents containing EndNote references, you can combine them into one document and generate a complete reference list at the end of the combined document.

Open each of the documents that you wish to merge

- Go to the **EndNote Word tab**
- Click on **Convert Citations and Bibliography**
- Select **Convert to Unformatted Citations**

Your citations will appear as unformatted citations, e.g. **{Smith, 2016 #3}**

Your reference lists will disappear.

Create a new, blank Word document and copy and paste each section that you want to merge into the new blank document in the order in which you would like them to appear.

Once you have pasted in all sections, go to the EndNote tab and click on **Update Citations and Bibliography**. Your citations should be reformatted and a 'master' bibliography will appear at the bottom of the document.

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6. Create Separate bibliographies for each chapter and a master bibliography at the end of the document

EndNote will allow you to create a reference list at the end of each section of a Word document. In addition, you can get it to create a complete bibliography at the end of the document:

- In EndNote, go to the **Edit** menu
- Go to **Output Styles** and select **Open Style Manager**
- Locate the style you wish to edit and click to highlight it
- Click on the **Edit** button
- Click on **Sections** in the left hand column
- Select either **Create a bibliography for each section** or **Create a bibliography for each section and a complete bibliography at the end of the document**
- Close the style and you will be prompted to save it
- Open Word, go to the **EndNote tab** and use the **Style** menu to select your saved style

To create sections in Word:

- **Click in the text** where you want your first section to end
- Go to the **Page Layout** tab in Word
- Click on **Breaks** and select **Next Page**
- Click on **Update citations and bibliography** in the EndNote tab

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