

# EndNote Reference Management Software

Introductory I : Getting to  
know the software



# Session Content

- Where to download
- How to create your library
- The 'look and feel' of EndNote
- Help & further information

First of all...



# Learning Outcomes

By the end of this session, you should:

- Know where to find EndNote to download it
- Understand the process of creating a library and setting up your preferences so that you're ready to use EndNote



# Getting started

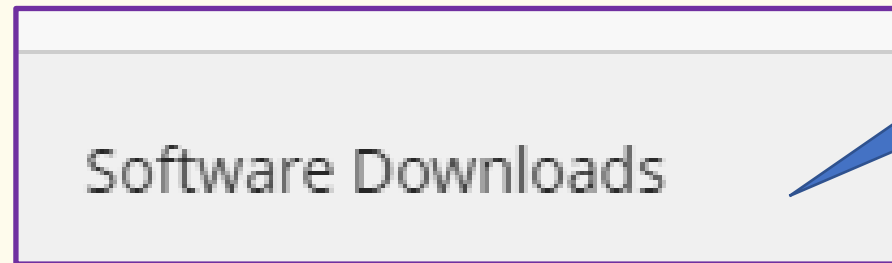
Download EndNote





# Start in Course Resources

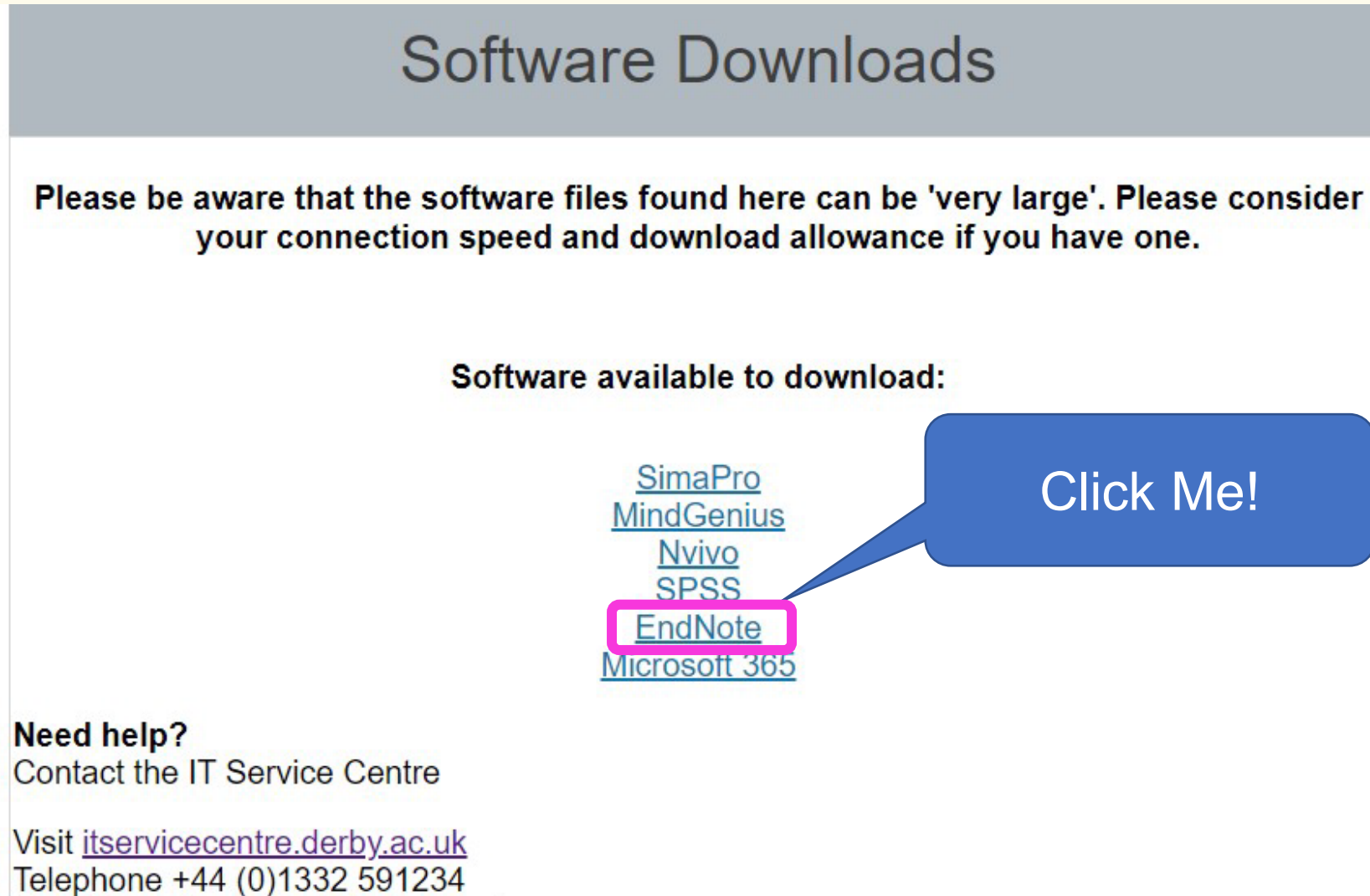
- Log in to UDO & go to the Course Resources home / landing page
- Look for the 'Software Downloads' link



Click Me!

- Click on it to see the list of software available through the university

# Click on EndNote to download the software to your device



**Software Downloads**

Please be aware that the software files found here can be 'very large'. Please consider your connection speed and download allowance if you have one.

Software available to download:

- [SimaPro](#)
- [MindGenius](#)
- [Nvivo](#)
- [SPSS](#)
- [EndNote](#)
- [Microsoft 365](#)

**Click Me!**

**Need help?**  
Contact the IT Service Centre

Visit [itservicecentre.derby.ac.uk](https://itservicecentre.derby.ac.uk)  
Telephone +44 (0)1332 591234

EndNote Installation guides (you will need to be logged into Course Resources to open up the relevant PDF)

[Windows Installation Guide](#)

[Mac Installation Guide](#)

If you have problems downloading, please check the [IT Knowledge Base](#) and from those pages you will also be able to log in and create a query ticket or use the live chat to speak with IT personnel.





## Warnings!



- Make sure you keep your EndNote Library on your hard drive – don't move it to the cloud
- There are two parts to each library – a data folder and your EndNote library file.
- Make sure you keep them both together
- Try to give your library a meaningful name to make it easier to find – otherwise EndNote will use the default, 'My EndNote Library'

# EndNote Libraries in File Explorer

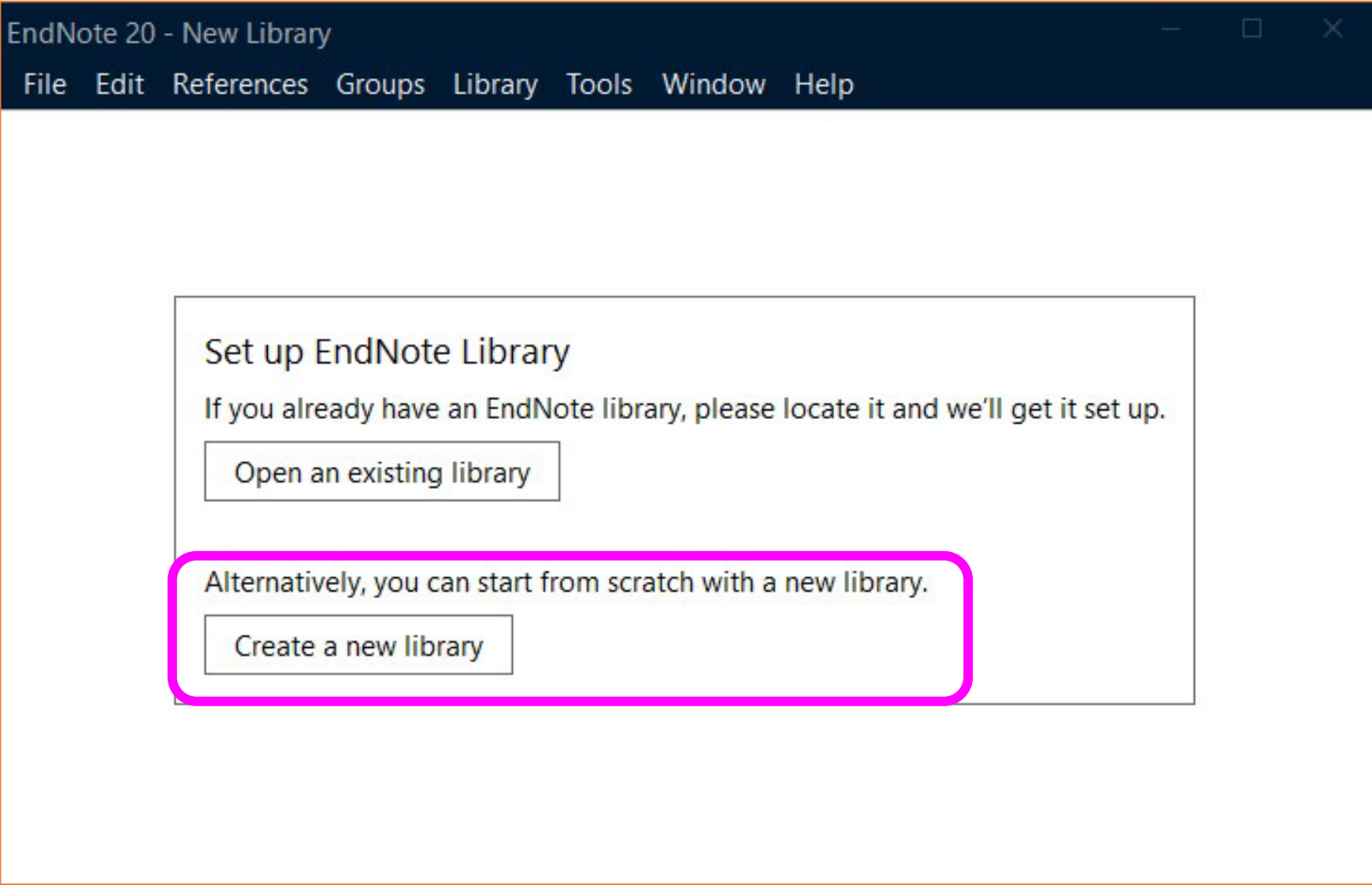
The files of data in your EndNote Library e.g., PDFs, record content etc.

The Library itself – this is what you click on to open the Library

- Delete when...
- EndNote
- EndNote Demonstration Library.Data
- Other
- Research Library.Data
- Sound recordings
- Workshop Demonstration Library.Data
- EndNote Demonstration Library
- Research Library
- Workshop Demonstration Library

Date modified	
23/09/2022 10:...	
28/01/2022 09:...	
03/10/2022 13:...	
31/01/2022 15:54	
31/01/2022 16:1	
01/11/2022	File folder
01/12/2021 14:48	File folder
01/12/2021 13:14	File folder
31/10/2022 15:23	File folder
01/07/2022 15:58	EndNote Library 12 KB
06/10/2022 16:35	EndNote Library 696 KB
31/10/2022 15:23	EndNote Library 1 KB







# Using your EndNote Library





# EndNote's 'look and feel'



# EndNote's home page

EndNote 21 - EndNote Demonstration Library

File Edit References Groups Tags Library Tools Window Help

2

3

4

1

My Groups +

Advanced search


My Groups  
0 References


Author Year Title Journal Label


Jisc Library Hub Discov...  
Library of Congress  
PubMed (NLM)  
Web of Science Core C...  
WorldCat (OCLC)


# Central section


Brief information according to the default field display


 Sync Configuration

 All References 100

 Imported Refer... 100


 Recently Added 100


 Unfiled 100


 Trash 0


▼ MY GROUPS

▼ Results by datab...







 Cinahl Com... 0

 Embase 0

 Google Sch... 0


 Web of Sci... 0

Advanced search



Imported References

100 References

	Author	Year	Title	Journal	Refer
	Abe, Kazunobu; Miyakoshi, Na...	2022	Effects of teriparatide and low-intensity aerobic exercise on oste...	Journal of Bone & Mineral Metabolism	Journ
	Adams, Olusegun; Shabi, Olab...	2021	The role of diabetes self-care education and practice in the man...	Family Medicine & Primary Care Revi...	Journ
	Alfaifi, Mohammed	2022	Contribution of genetic variant identified in HHEX gene in the ov...	Saudi Journal of Biological Sciences	Journ
	Alqadri, Nada	2022	Independent case-control study in KCNJ11 gene polymorphism ...	Saudi Journal of Biological Sciences	Journ
	An, Yongcheng; Duan, Yuhui	2022	Correlation analysis of intestinal flora and pathological process o...	Journal of Traditional Chinese Medica...	Journ

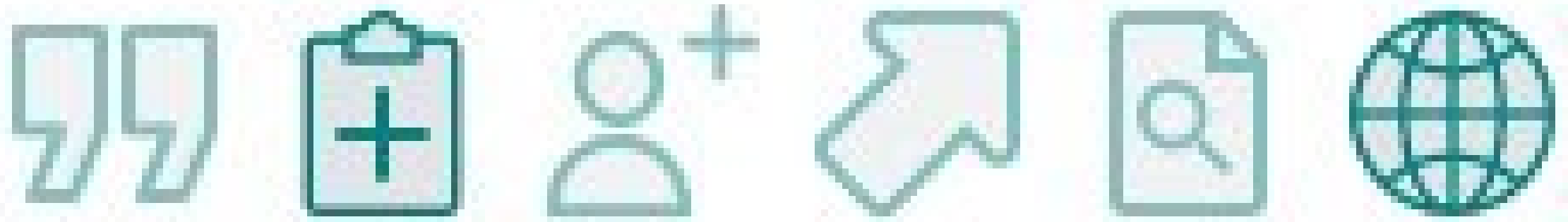


# Action tabs on the upper left of the page

EndNote 21 - Workshop Demonstration Library

File Edit References Groups Tags Library Tools Window Help

# Action icons on the upper right of the page





# Resources in left-hand sidebar

↻ Sync Configuration

📄 All References

🔔 Recently Added

📄 Unfiled

🗑️ Trash

▼ MY GROUPS

➤ My Groups

▼ MY TAGS

+

▼ FIND FULL TEXT

▼ GROUPS SHARED BY O...

▼ ONLINE SEARCH

+

🌐 Jisc Library Hub Discov...

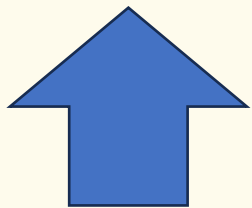
🌐 Library of Congress

🌐 PubMed (NLM)

🌐 Web of Science Core C...

🌐 WorldCat (OCLC)

Top





UNIVERSITY OF  
DERBY

# A closer look

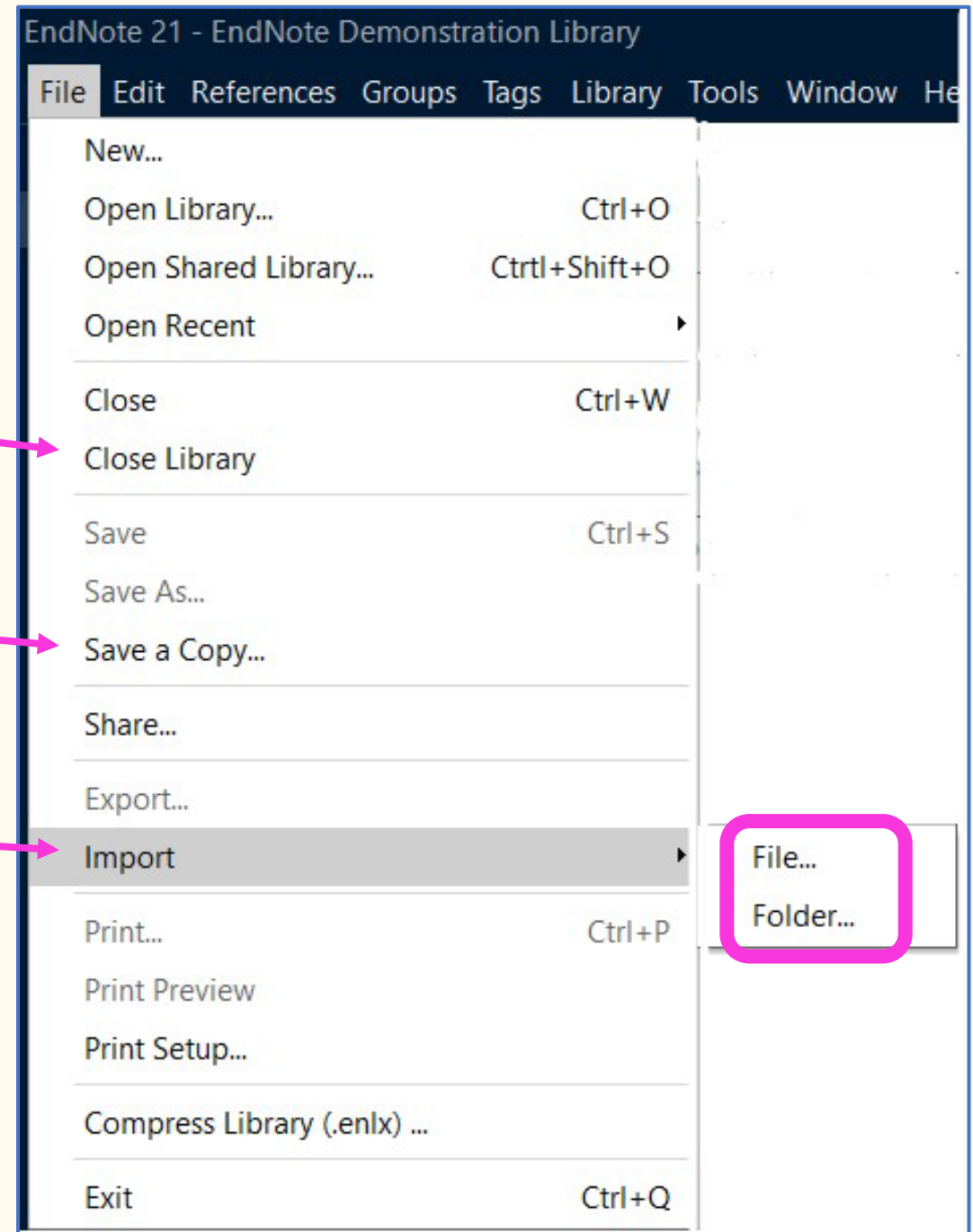


derby.ac.uk



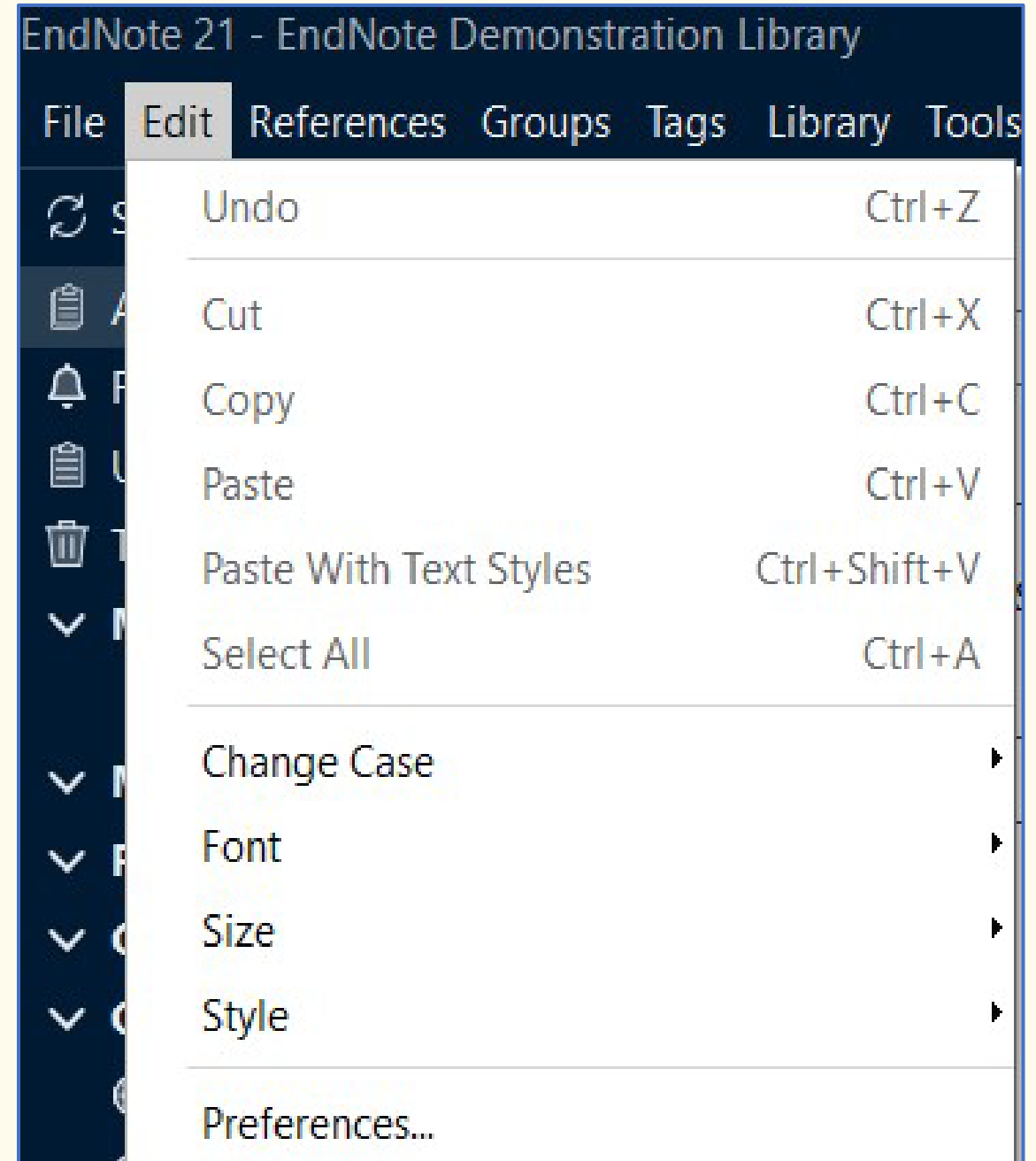
# The 'File' tab

- Close Library
- Save a Copy
- Import
  - File
  - Folder



# The 'Edit' tab

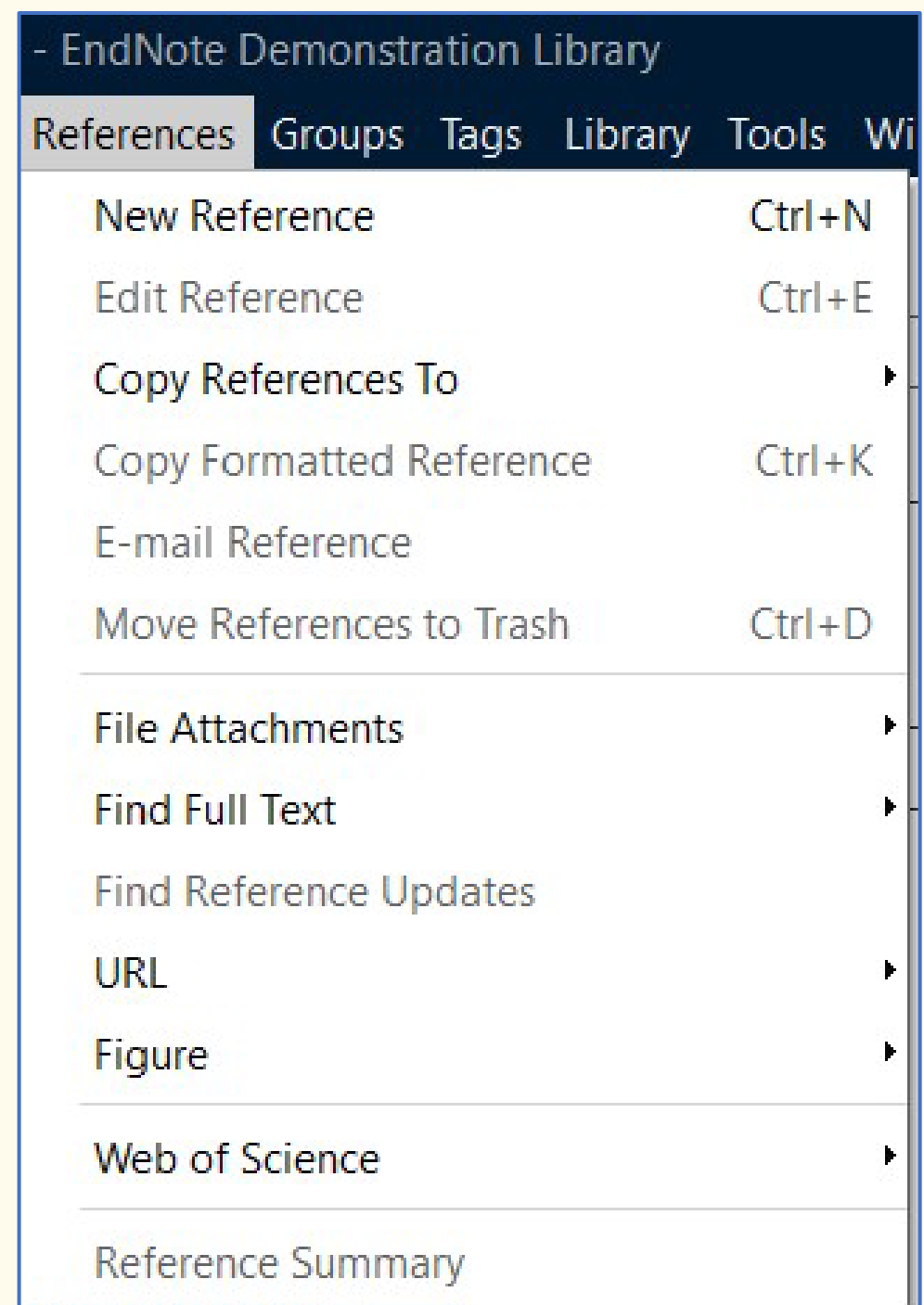
- Change appearance
  - Case
  - Font
  - Size
  - Style (e.g., bold / italic etc.)
- Preferences





# The 'References' tab

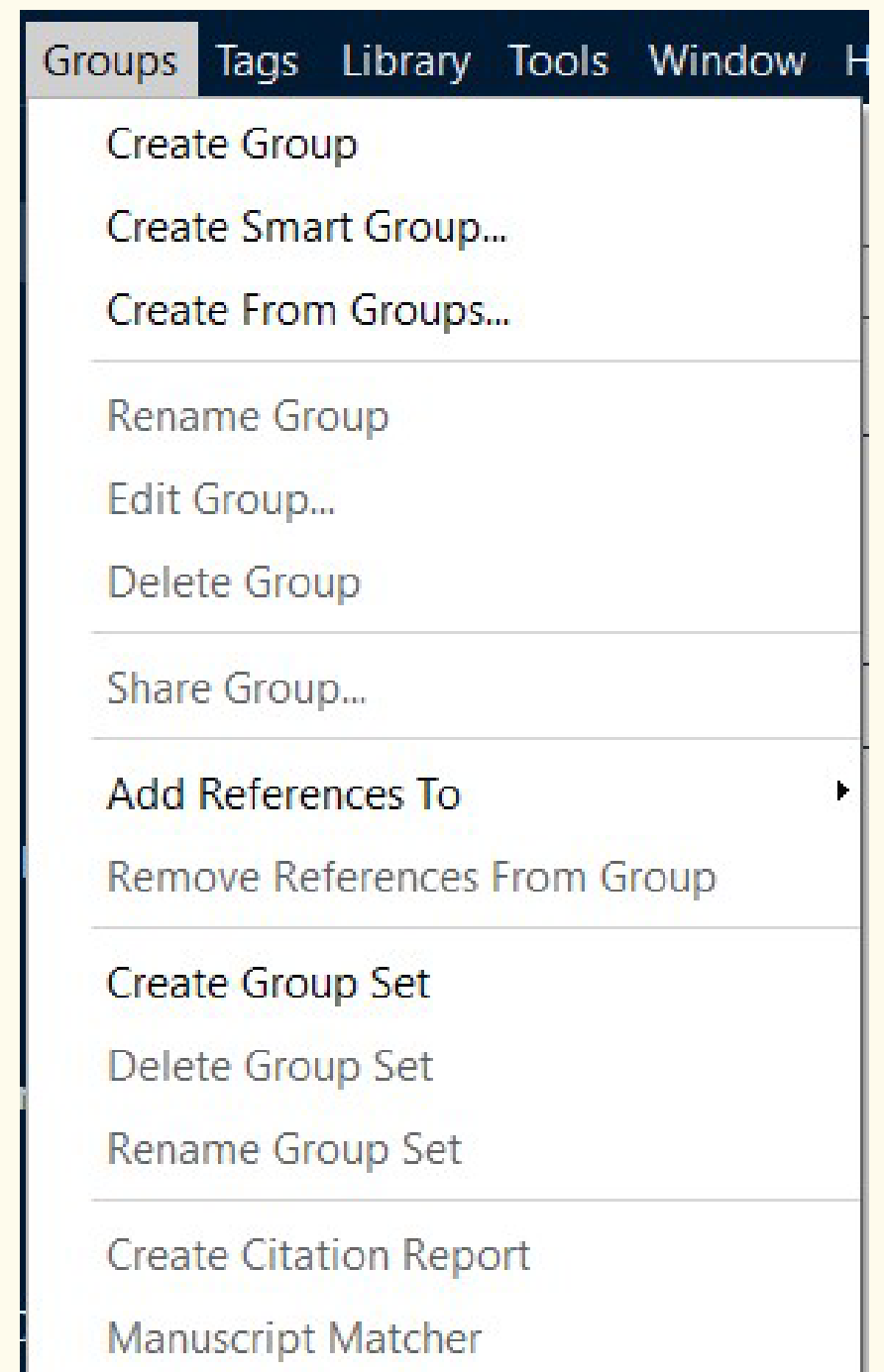
- New Reference
- Copy References To
- Find Full Text





# The 'Groups' tab

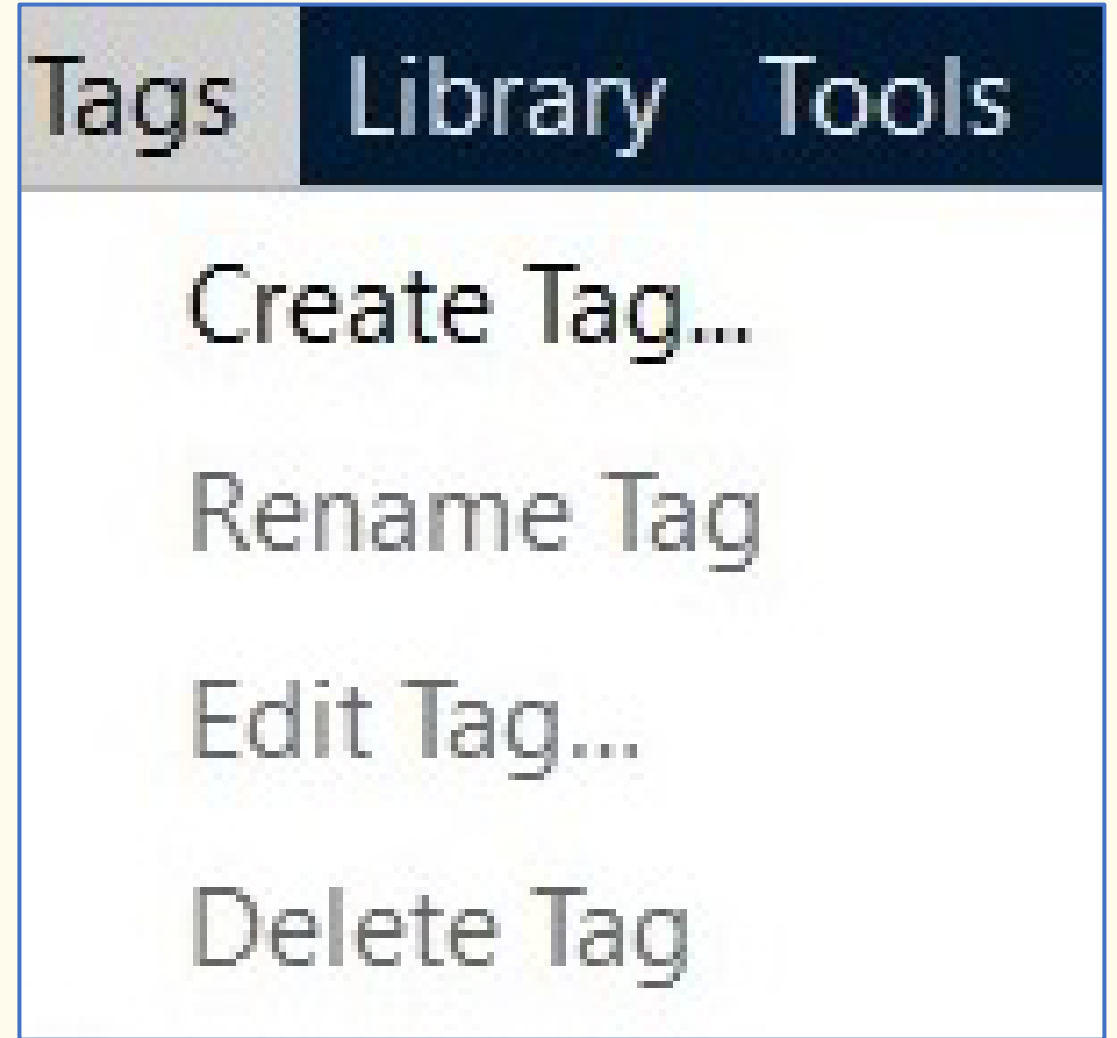
- Different group options
- Most key is 'Create Group'
- Researchers doing systematic reviews / larger pieces of research may find 'Create Smart Group' or 'Create From Groups' useful as well





# The 'Tags' tab

- New feature
- Helps with organising
- Can help with recording of  
e.g., themes







# The 'Library' tab

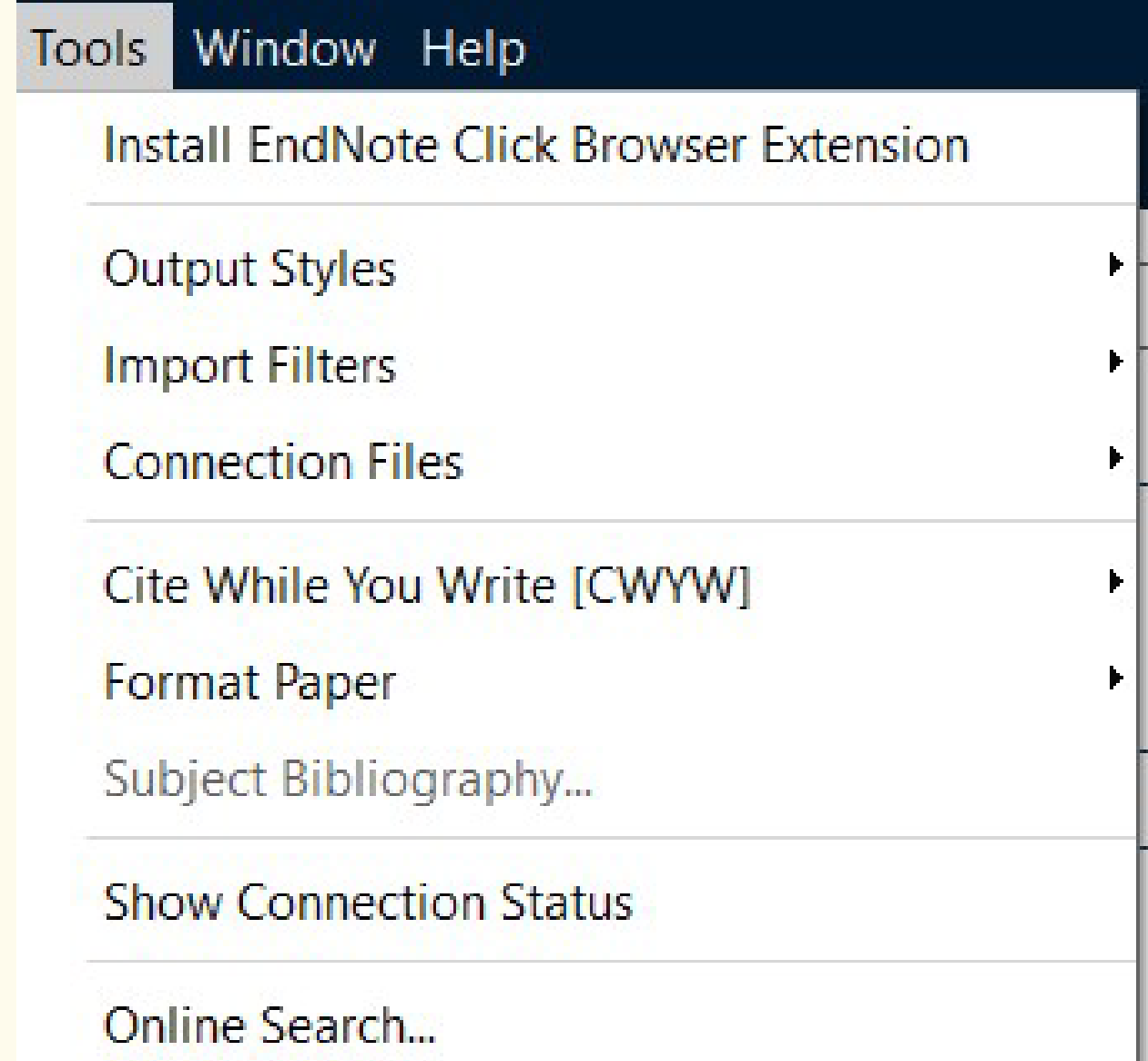
- Sync
- Advanced Search
- Find and Replace

Library		Tools	Window	Help
Sync				
Advanced Search				Ctrl+Alt+F
Sort Library...				
Find Duplicates				
Find Broken Attachment Links				
Remove Broken Attachment Links...				
Open Term Lists				▶
Define Term Lists...				Ctrl+4
Link Term Lists...				Ctrl+3
Spell Check				Ctrl+Y
Find and Replace...				Ctrl+R
Change/Move/Copy Fields...				
Recover Library...				
Library Summary				



# The 'Tools' tab

- Install EndNote Click
- Output Styles
- Cite While You Write [CWYW]
- Online Search



# Questions?

## Library Enquiries

- [library@derby.ac.uk](mailto:library@derby.ac.uk) / (01332) 59 1215

## Develop@Derby Hub

- <https://libguides.derby.ac.uk/develop-at-derby>

## Library Workshops

- <https://libcal.derby.ac.uk/>

## Research skills help

- <https://libguides.derby.ac.uk/researchguides>

## EndNote Support (Clarivate)

- [https://support.clarivate.com/Endnote/s/?language=en\\_US](https://support.clarivate.com/Endnote/s/?language=en_US)



THANKS!

