

# EndNote Library FAQs

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We have compiled a list of the more frequently asked questions and answers about [working with EndNote libraries](#) (desktop and web versions).

Specific versions of EndNote, Word and operating systems are indicated in the questions where relevant.

Last updated **04/05/12**.

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## Solutions

1. I want to save the changes made to my library. Why is the "Save" button greyed out under the "File" menu?
  - The "Save" menu item under "File" isn't actually meant to allow you to save a library, it's there to allow you to save changes to a reference that you are currently editing.
  - Whenever you close an "Edit Reference" window, the changes you have made are automatically saved to your library.

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2. Why don't corporate authors in longhand format correctly in my bibliography?
  - If you don't add a comma for example after "Department for Education and Skills" in the author field, it may be formatted as "Skills, D. f. E. a."
  - If corporate authors contain one or more internal commas, you replace the first of these commas with two commas, and don't put a comma at the end, e.g. "U.S. Department of Education,, Bureau of Information".
  - Problems may arise with in-text citations if the output style is configured to insert last name only as just "U.S. Department of Education" will appear. Such problems would have to be corrected manually in the final edit. The bibliography at the end of the document will however be correct.

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3. How do I input titled authors or those with multiple-word last names?
  - Enter authors with titles, such as "Jr." or "Dr.", as Last Name, First Name, Title. For example - Smith, Alfred, Dr. The text after the second comma will print exactly as entered.
  - Similarly with more complex surnames, enter as Last Name, First Name. For example - de Gaulle, Charles.

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4. I've downloaded the updated IOE House Style but why doesn't it appear in the dropdown list when I try and reformat my bibliography?
  - You can save new or updated output styles to the "Styles" folder within "C:/Program Files/EndNote/Styles" on a PC.
  - If Vista or Windows 7 restrict access to this location simply create a new folder within C:\Documents and Settings\*your name*\My Documents\EndNote Styles for example and copy the downloaded file(s) to it.
  - Then change the default folder location within your EndNote library via Edit > Preferences > Folder Locations to point EndNote to this new location.

- EndNote will effectively merge both the default and customized folders into one single listing.

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#### 5. How do I export my EndNote library as a text file?

- Select the references you want to export and choose "Show Selected References" (or "Show All References" to export the entire contents of the library) from the "References" menu.
- Choose the appropriate output style as required ("Show All" includes all fields. "Annotated" will include the abstract field).
- Select "Export" from the "File" menu and save as a text file to the appropriate drive.

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#### 6. How can I add a keyword to a group of references in my EndNote Library?

- First select the group of references that you want to edit from your complete, displayed library using your mouse and the CTRL key.
- Alternatively you can search by author, date or keyword for example by clicking on "References" and then "Search References".
- Click on "References > Show Selected References" to show only this subset of selected references and then "References > Change and Move Fields".
- "Change Author Field" is the default, but you can change this to "Keyword" (or any other field).
- To have your keyword go to the end of any existing list of keywords, leave the default as "Insert after field's text".
- In the blank box on the right-hand side of the screen, input your new keyword(s) and click on "OK".
- The keywords will be added to the keyword field of the selected references.

\*See also EndNote Library [FAQ #20](#) below "**term lists**".

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#### 7. Why are my citations incorrectly imported?

- EndNote filters are not perfect - nor is the information contained within journal indexes, databases and library catalogues if exported to EndNote.
- Although filters and connection files work well most of the time, sometimes citation data elements may not always end up in the correct EndNote field or indeed correct reference type.
- You must **always** check to see if some manual editing is required.

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#### 8. How can I import references from Google Scholar?

- You can export/import references **one at a time** into EndNote or EndNote Web.
- You will need to configure your Google Scholar preferences first before sending references to EndNote or EndNote Web. You can then use the "Import into EndNote" (for **Endnote or EndNote Web**) or "Import into RefMan" (for **EndNote**)

**Web)** links on the search results screen. The "Refman" option may import extra data into EndNote Web but the results are roughly comparable.

- To configure either, select the "Scholar Preferences" link from the Google Scholar home page.
- Under "Bibliography Manager" select the option "Show links to import citations into" and choose "EndNote" or "RefMan" as appropriate in the drop down box.
- Click on the "Save Preferences" button.
- After performing a search on Google Scholar click on the "Import into EndNote" link under the reference if you want to import into EndNote.
- If you are presented with a window asking if you want to "Open" or "Save" the file, choose to open the file, otherwise proceed to the next step.
- A "Select a Reference Library" window will appear, double-click the appropriate EndNote library and the transfer will be automatic.
- With EndNote Web click on the "Import into EndNote" or "Import into RefMan" link under the reference you want to import.
- Choose to save the file rather than open.
- In EndNote Web, select "Collect > Import References".
- Select the file you downloaded in field 1 by clicking on the "Browse" button.
- Choose the "RefMan (RIS)" or "EndNote Import" filter in field 2 and the group of your choice in field 3.
- Click the "Import" button and your references will be imported into this group.

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#### 9. How can I import my existing reference collection in Word or Excel into EndNote?

- If you have less than a hundred references it may be quicker to enter these manually into EndNote or copy and paste sections into the appropriate fields from your existing system (this is particularly useful if you have abstracts).
- Other references will be available electronically and can be searched for again and imported directly in the usual way.
- A more sophisticated filtering option **but** potentially time-consuming one if your references are contained within a text file or spreadsheet such as Excel, is to tag references in a logical, consistent format and then import using a customised filter you create.
- You can utilise mail-merge to create a document containing each tagged record from your spreadsheet which can then be imported into EndNote.
- Detailed [instructions](#) are available from Adept Scientific.

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#### 10. How can I merge two existing EndNote libraries?

- To import one EndNote library into another, use the "Import" command from the "File" menu choosing the "EndNote Library" import option and appropriate "Duplicates" setting.
- The advantage of using the Import command over the other two methods mentioned below is its ability to filter out duplicate references.
- When importing from a currently open library, only those references "showing" in the Library window are imported unless the library you are importing is locked or in "Read-Only" mode. Otherwise select "Show All References" to import all references.

- You can copy image files and attachments from the original library's .DATA folder to the destination library's .DATA folder so the images will link and appear correctly in the destination library.
- Alternatively you can simply "cut and paste" or "drag and drop" selected references between libraries.

\*Newly added references are assigned new record numbers in the order that they are added to the library. As a result, you will need to **re-insert** any references linked to the older record numbers in a paper as the re-numbered references in the newly merged library will not automatically be recognised. Before merging libraries, it is a good idea to make a backup copy of the library into which you are transferring references.

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11. How can I generate a subject bibliography based upon the keyword or notes fields for example?

- Highlight those references in your library you wish to include.
- Select "Subject Bibliography" from the tools menu to display a list of the EndNote fields by default field name.
- Highlight the field(s) whose contents you wish to use as subject headings.
- If you mix date and text fields, dates will sort before alphabetic subject headings.
- Click "OK" to display and select those terms you wish to include as subject headings.
- Click on the "Layout" button to modify the layout and style. Verify the settings on the "References", "Terms", "Page Layout", and "Bibliography Layout" tabs and click "OK".
- Use the "Terms" tab to set options specifically for subject headings. For a subject bibliography, it is important to select the "Subject Terms and Reference List" item.
- Subject headings print as they appear in your records. No special formatting of author names and no journal title substitution is applied.
- Display, print or save the formatted page as required.

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12. Is it possible to automatically change the reference type of multiple records from book to edited book for example?

- First select the group of references that you want to edit from your complete, displayed library using your mouse and the CTRL key.
- Alternatively you can search by author, date or keyword for example by clicking on "References" and then "Search References".
- Click on "References > Show Selected References" to show only this subset of selected references and then "Edit > Change Text".
- From the "In Field" list, select the field to be searched, for example "Reference Type".
- In the "Search for" box, type the text to be changed (ie Book) and in the "Change the text to" box, the text to replace it (ie Edited Book).

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13. What is the short title field used for?

- Many humanities styles require that you use the Short Title field to enter abbreviated versions of the regular title as used as part of an in-text citation or a footnote citation.
- For example MLA typically lists just the author name and the specifically cited pages in the in-text citation (Izzo 141).
- If there are multiple works by that author, MLA requires that the title, or a shortened form of it be added to the citation.
- Where the full title of the reference is fairly long, such as "**Research and reflection: teachers take action for literacy development**" an easily recognisable form of the title is used that starts with the first word on which the normal title would be sorted. For example: (Izzo, **Research** 141)
- If an EndNote style is configured to use the Short Title field but that field is empty in a record, the normal Title field is used instead.

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14. How do I format my bibliography so that the second line of each reference has a hanging indent?

- If your chosen output style does not already do this, preview a reference using the style in the library window.
- Select "Edit > Output Styles" from the menu bar at the top of the screen and select your style.
- Choose "Bibliography > Layout" from the left-hand pane.
- Select "All paragraphs" from the "Hanging Indent" dropdown at the foot of the screen.
- Save your changes.

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15. How do I insert an "en dash", which is slightly longer than the hyphen to indicate a range of pages (i.e. 54-56) for journal articles or book sections?

- Make sure "Num Lock" is on.
- Hold down the "Alt" key, and type 0150 on the keypad (don't use the numbers at the top of the keyboard).
- Release the "Alt" key, and your en dash will appear.

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16. Can I cite references in multiple documents or should I maintain separate libraries for each of my assignments?

- We recommend you only maintain one EndNote library as each has an unlimited storage capacity of many thousands of references.
- Effective keywording will allow you to quickly find references relating to a particular assignment.
- The same reference can be cited in multiple pieces of work.
- If you have EndNote X1 or later installed you can use the new "Groups" feature to sub-divide one large library into multiple subsets, so making it even easier to manage your references.

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17. After installing EndNote and opening Microsoft Word, I do not see the EndNote toolbar or commands under the Tools menu. How can I fix this?

- Solutions are provided by the developers specific to the versions of EndNote and Word you have installed. See [toolbars](#).

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18. What are term lists? How can they save me time?

- Term lists help improve the consistency and accuracy of information in your library by automatically recording your input entries in the Authors, Journals, and Keywords fields (default options).
- You can further customize these options via "Tools > Define Term Lists".
- As you enter new references into these fields (whether by typing, importing, or pasting them) EndNote updates the term lists automatically and attempts to complete the name by suggesting the closest matching name in the term list.
- If you enter a new name that is not already in your lists, the name appears in red text to indicate that it is a new addition to the term list.
- When you close or save the reference, that new term is added to the list.
- When you are searching for references, you can also open a term list via "Tools > Open Term Lists" to pick the exact term or name for which to search.
- If you need only a list of author names, you can use the author term list, highlight the ones you want (or select all) then copy and paste into a word document.

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19. Is EndNote fully compatible with Windows Vista?

- EndNote X1 onwards is compatible with Windows Vista.
- There are currently a number of [compatibility issues](#) when using EndNote 8, 9 or X however.

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20. Why can't I connect to and search the IOE library catalogue using EndNote from home?

- As of November 2010 newly purchased copies of EndNote should have the IOE Library Catalogue connection file pre-installed. It is called **Inst\_Education**.
- If not, you can copy it from the EndNote connection files download page on the IOE Intranet. See **Intranet> Library> Guides> Computing Software> Bibliography Management**.
- Instructions where to save this file on your computer can be found at the top of this page.
- Remember to review your search results to ensure reference types are correctly identified and data appears in the correct fields.

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21. Why aren't my IOE library catalogue search results in chronological order?

- Remember to review your search results to ensure reference types are correctly identified and data appears in the correct fields.

- Your returned search results may not appear as they would if you did a direct search of the catalogue itself but the numbers should tally.
- Simply click on the 'Year' field heading within the library window to sort your results chronologically.
- Please note that EndNote cannot possibly exactly replicate the sophisticated search options available on the catalogue interface. It does however offer a quick and easy way to transfer references to EndNote.

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**22.** If I delete references from a group within EndNote will they be removed from the main library itself?

- If you use the "Delete References from Group" command or simply hit the "delete" key the reference(s) will only be removed from the group.
- If you right-click and select "Cut", the reference(s) will be deleted from the main library itself.

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**23.** Why don't the URLs for eJournal articles or web pages display when I use the IOE House Style?

- You must use the "Electronic Article" reference type for eJournals and the "Web Page" (EndNote X onwards) or "Electronic Source" (EndNote 9) reference types for web based sources to display URLs correctly.
- It is also important to complete the "Date Accessed" (eJournals) and "Access Date" (Web Page/Electronic Source) fields to format your bibliography correctly.
- If you do not **explicitly** have to reference the electronic version of a journal article, you can reference the print version after checking that page numbers and other bibliographic details match exactly.

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**24.** Can I email a copy of my library to a colleague?

- EndNote libraries are completely portable and can be emailed as an attachment, saved to a disk or drive.
- You can save your complete library in EndNote X onwards (the **.enl** file as well as its associated **.DATA** folder and all of its contents) to a single compressed **.enlx** file in order to easily back up your library or send a copy to a colleague.
- As long as the recipient has access to EndNote they can easily restore (unzip) the compressed library with EndNote.
- Open your library and select "File > Compressed Library" to save as an EndNote Compressed Library (.enlx file).
- Any characters such as \ ? / \* in the original library filename will be replaced with an underscore in the compressed library filename.
- Use EndNote (version X or later) to open the .enlx file, which will extract the .enl file and the .DATA folder to the same folder where the .enlx file is located.
- The library can then be opened as normal.

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**25.** Can I download the full-text of an article along with the citation and abstract directly into my library?

- EndNote X4 allows you to import full-text PDFs into your library and automatically create references from these as long as the PDF includes a DOI (digital object identifier) number. Otherwise you can **attach** the document (EndNote X onwards) directly to the relevant reference. Previous versions of EndNote will insert the relative **path** to the saved file.
- Simply save the full-text document to a suitable location.
- Highlight the relevant reference and select "References > File Attachments > Attach File".
- Navigate to the saved file and select "Open" to insert the file directly into your chosen reference.
- It is not advisable to paste full text documents into the notes field for example.

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**26.** Is it possible to transfer a Windows EndNote library to EndNote on a Macintosh (and vice-versa)?

- Yes libraries that are created on the Mac or PC version of EndNote are compatible across platforms.
- You can transfer the files via portable media or you can email them to yourself.
- **From PC to Mac-** in the EndNote program on the Mac choose "File > Open > Open Library". As long as the library has the .enl extension, EndNote will display it.
- **From Mac to PC-** open EndNote in Windows. (If you see a dialog prompting you for a reference library file, choose Cancel.)
- Select "File > Open > Open Library". Under "Look in" navigate to the location of the library you want to open.
- If your library does not have the extension .enl or .lib it will not appear in the dialog.
- If that is the case, select "All Files" \*.\* from the file type list. Select your library and click "Open".

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**27.** My library is now marked "read-only". How do I disable this feature?

- Multiple users can access one EndNote library simultaneously as long as the library is restricted to read-only or locked status.
- This will allow the user to perform searches, copy information to their documents and format their papers but **not** make any changes.
- To switch off read-only, simply right click the unopened library/file and select "Properties" and then ensure the "read-only" box is unchecked.

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**28.** Can I connect to and search the IOE library catalogue from EndNote Web and then format my references using the IOE House style?

- Yes customised IOE connection and bibliographic style files have been uploaded to EndNote Web.
- Select the IOE library catalogue connection via "Collect> Online Search> Customize this list".
- Select the IOE House Style via "Format> Bibliography> Bibliographic Style".

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29. Can I export my references into Excel or Access?

- Yes in the export dialog of more recent versions of EndNote, there is an option to select 'Tab Delimited' as your export style.
- Then simply paste/import this text file into Excel or Access.

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30. Will I be able to access my EndNote Web account after I leave the IOE?

- You will be able to access your EndNote Web account remotely for up to **12** months after you last log into the account from a recognised IOE computer IP address.
- So logging in on site just before you leave will maximise your length of access.
- Best practice would be to export your EndNote libraries as a RIS or .enl file when you leave as this means you will definitely retain your data.

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31. I've accidentally deleted my library! Is there any way of retrieving it?

- Yes! But only if you still have the saved **.Data** folder.
- When EndNote opens a library, it first checks the contents of the .Data folder, and only uses the information in the .enl library file if the .Data information is missing or corrupt.
- So, using the .Data folder you can essentially trick the program into restoring the original library.
- Simply create a plain text file, and rename the file using the original library name, followed by the .enl file extension.
- Your original restored library will now open as normal.

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32. What's the best way to synchronise my EndNote library when working at the IOE and then at home for example?

- You can of course use a USB to **transfer** a 'master' copy of your library to work between computers as long as you remember to open and edit the correct version!
- However we **do not** recommend running your library from a USB drive. The file system is simply not as stable as a regular computer hard drive.
- Or you could download and try out one of the many free synchronisation tools available on the web. If you have a **Windows Live** account experiment with their free application [Windows Live Mesh](#) to automatically synchronise data on different machines. It also creates a 'cloud' based backup of your data for added piece of mind.
- Or why not create an EndNote Web account with EndNote X4 onwards and use the 'transfer' function to synchronise both your desktop and 'virtual' libraries.
- You may even find EndNote Web works so well for you that you don't need to buy a personal copy of EndNote at all!

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33. Can I access an EndNote library stored on my 'N' drive remotely via the Portal?

- If you save the original library on your N drive as a '**compressed library**' it will bundle both the .enl and .data files together and these will open correctly via the Portal preserving both the library and the attachments etc.
- You can compress a library within EndNote X1 onwards using "File>Compressed Library". The suffix will change to for example, **MyLibrary.enlx** but when opened will extract **MyLibrary.enl** and **MyLibrary.data** while keeping the original compressed version intact.
- You will need to be aware of which version you are updating as you will essentially have two copies now.
- You can of course open an EndNote library saved in the 'normal' way via the Portal but if the .data folder will not open, your attachments and other additional features may not be available to you.

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34. Is there a 'search and replace' function to change for example the reference type associated with a group of references?

- You can use the **change text** command to change wording within reference fields, including the reference type itself across multiple references.
- Select the references you want to change using "References>Show Selected References".
- Choose "Edit>Change text" from the EndNote menu and then "Reference Type" which appears last in the dropdown listing.
- In the "Search for" box enter the exact name of the reference type you want to replace and in the "Change the text to" box the exact name you wish to substitute.
- EndNote will prompt you to confirm the change and bear in mind that if you need to change several reference types you need to do them one by one.

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35. I purchased the download version of EndNote, and need to reinstall, but I no longer have the installer file on my computer. How can I re-download the software?

- For EndNote X1 and later, you can simply download the demo version from this [site](#) and during installation choose "I am an EndNote customer."
- You will be prompted to enter your Product Key and the full version of the program will install.

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## Further Guidance

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This is only a brief introductory guide to EndNote. For further sources of information please see -

- EndNote's inbuilt help function accessible via the onscreen menu.
- The complete user manual provided with the software.
- Our new **LibGuide** on the web - [libguides.ioe.ac.uk/endnote](http://libguides.ioe.ac.uk/endnote).
- Library staff at [lib.enquiries@ioe.ac.uk](mailto:lib.enquiries@ioe.ac.uk).
- EndNote technical support staff - [www.adeptscience.co.uk/kb/](http://www.adeptscience.co.uk/kb/).

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For further eLibrary Resource Guides see [www.ioe.ac.uk/library/guides](http://www.ioe.ac.uk/library/guides)