

EndNote FAQs

Introduction

The following are some of the more commonly-asked questions about using EndNote. Some of the answers may apply to earlier versions of the software. Other questions may be answered on the [support pages](#) available on the EndNote website or by contacting [EndNote Technical Support](#). If you have a question or suggestion for an EndNote FAQ please [email us](#).

The Galter Library has also created an [EndNote Basics Guide](#). Many of your questions may be answered by reading this document.

When I try to install EndNote, it asks for a product key. Where can I find that?

There is no product key for the NU version of EndNote, nor can you upgrade to the NU version from a trial version. If prompted for a product key, stop the installation, return to the zipped folder (likely in your Downloads folder) and follow the instructions below. If you have installed the trial version, you will need to uninstall it and then follow the instructions below:

When downloading EndNote from the NUIT website select "Save File". A zipped folder will be downloaded to your computer. *Do not* double click on the zipped folder. Instead, right click and extract the contents of the folder to a convenient file folder on your computer.

EndNote installation hangs up and fails on my Windows PC / laptop

There are issues during installation of *EndNote X4 and later* on Windows computers, **especially those running Windows 10** (and later) operating system. Please see [our 2018 news item / mini-guide on how to overcome EndNote installation issues](#) on newer Windows operating systems.

I do not see the EndNote toolbar or commands in Microsoft Word.

To get the Windows EndNote Cite While You Write (CWYW) commands to appear in Microsoft Word 97/2000/XP/2003/2007/2010, see the CWYW 1 on the EndNote FAQs website for [instructions on how to fix this](#).

Can I create an EndNote library from a non-EndNote Word document?

Yes, this is possible, but it is quite labor-intensive. Essentially, there are 4 methods of doing this (we recommend the last method, using PubMed):

- Rearrange the reference data using your word processor so that it is in a format that EndNote can import.
- Copy and paste each piece of data from its source into the proper fields in EndNote.
- Enter the data manually by typing it into EndNote.
- Copy your references from a Word document or PDF and paste them into the [PubMed Citation Finder](#) then follow the detailed PubMed instructions (see steps below).
 1. Download the EndNote filter at [PubMed](#).
 2. When downloaded, open in EndNote, then do a Save As (remove the word “copy” from the file name)
 3. Then go to the [Citation Finder](#) in PubMed.
 4. Copy and paste your list of citations into the box on this page. Important: the citations should already be a numbered list. They need to be separated in this way so the PubMed citation finder will parse them correctly.
 5. Click the Submit button.
 6. You will be asked if the citation list split correctly. If it did, click yes. If not, return to the previous page and fix the separation between the citations.
 7. When you click yes, the citations will be listed in an exportable format. If any citations aren't found, they will be noted.
 8. Check all and choose “Export Citations”, then RIS for exporting to EndNote.
 9. A dialog will appear asking whether you want to open or save the file. Choose “Open with ResearchSoft Export Helper” if available, or select EndNote as the application to open it. As long as you have saved the EndNote filter in Step 2, the citations should export right to your EndNote library.

An additional method would be to search for each citation individually in the most likely database to hold the citation information, such as PubMed. Search using the EndNote interface or search PubMed directly and import the data into EndNote. Again, this is labor-intensive, but it may be the most accurate way of ensuring your data will be entered correctly.

Where can I acquire EndNote?

The university has purchased a site license for EndNote. The current version is EndNote X4. Current Northwestern students, faculty and staff with valid NetIDs can download EndNote from the NUIT website. If you do not know your NetID or are having problems downloading the software, please contact NUIT at consultant@northwestern.edu or (847) 491-HELP. Please follow the instructions below to the letter.

- [Download EndNote](#) (you will be prompted to sign in using your NetID and password).
- **Note to Windows users:** When downloading select “Save File”. A zipped folder will be downloaded to your computer. *Do not* double click on the zipped folder. Instead, right click and extract the contents of the folder to a convenient file folder on your computer.
- After installing the software you should run the update to X4. In EndNote, go to Help > EndNote Program Updates and follow the on-screen prompts.
- If you are off-campus when installing EndNote, you will need to first [connect to NU using VPN](#) (signing in to the Galter Library website is not sufficient).

Can I create a separate library using the references in a bibliography created in EndNote?

There may be occasions where you want to copy all the references used in a Microsoft Word document to an EndNote library of its own. Perhaps you have a large EndNote library, but want to create a smaller EndNote library with only the subset of references used in your paper. This is called exporting a traveling library.

To do this:

In Word 2007/2010

- Click on the EndNote tab.
- Click on the **Export to EndNote** button and choose **Export Traveling library**.
- Export the traveling library to an existing EndNote library or a new EndNote library and click **OK**.
- If exporting to a new library name the library and click **Save**.

In earlier versions of Word

- Go to **Word>>Tools>>EndNote >>Export Traveling Library**.
- Export the traveling library to an existing EndNote library or a new EndNote library and click **OK**.
- If exporting to a new library name the library and click **Save**.

The traveling library does not contain Notes, Abstracts, Images, or Captions.

My publisher will not accept a manuscript with an EndNote formatted bibliography. Can I still use EndNote?

Yes you can.

- Create and format your bibliography as you would normally.
- From the **EndNote** menu in Word choose **Convert Citations and Bibliography > Convert to Plain Text**.
- When prompted to save the document, save it under a different name.

The new document retains the bibliography as text. There will be no links between this document and the EndNote library you used to create the bibliography in your original manuscript.

When submitting a grant to the NIH, they require that the PMC number be included for all references. How do I do this?

The NIH has revised their policy for submissions to require the PubMed Central reference number be included in documents submitted to the NIH. Take a look at [Import 15](#) on the EndNote FAQs for more information.

Should I use a master library or create several smaller subject- or project-specific libraries?

This is largely a matter of personal preference and may be dependent on how many people are working with the EndNote libraries and how organized you are. The EndNote producers recommend that users keep all their references together in one main or master EndNote library. This usually avoids hassles inherent in splitting references between libraries and then needing to have multiple libraries open in order to create a bibliography for one paper. Using multiple libraries can also become problematic if a number of people are working on the same project. Instead of making different specialty libraries, you will probably find it more useful to create one library and use the **Groups** function to help you organize and categorize your references. Using the Groups function will enable you to quickly move selected references to a specific group of references and navigate between groups of references.

How do I link to the PDF of an article from a citation in my EndNote library?

It is possible to either link to the URL of a document or attach files to an EndNote citation. The URL method would require that you are in a position to access the PDF of an article if the article is a licensed resource. In other words, you would need to be on campus to link to the article. The other method - attaching a file - requires that you have saved the article as a file somewhere on your hard drive first or that you use the Find Full Text feature to attach it. Once attached, it can be opened anywhere as long as the native application (Word, Acrobat Reader, etc.) is on the same computer. *Note:* Attached files are copied and saved to the Data folder that was created when you started your EndNote library. The Data folder will have the same name as your library and can be found in the same directory where your library is saved.

- Right-click on the Reference and select **File Attachments - Attach File**.
- Locate the file on your hard drive and attach it.
- Remember that you need to have the object/file saved somewhere on your hard drive, shared drive, or on a disk before you attach it.

For instructions on configuring EndNote to attach PDFs for NU-subscribed resources using the Find Full Text feature, see the [Advanced EndNote](#) guide.

How do I update my EndNote citations automatically with PMCID numbers?

There's a video for that! Check it out here and turn up the volume of your speakers:
http://doc.med.yale.edu/guides/screencasts/endnote_tt/endnote_tt_3/

Can I sync my library on one computer with the library on another?

If you use EndNote on different computers, you may want to sync your library from one machine to the other. One way is to just overwrite the library on one computer with the latest version that you've saved to a flash drive or emailed to yourself. Another option is to use EndNote Online (formerly Web), an online back-up for your EndNote libraries that allows you to sync libraries online from one computer and then re-sync to another computer with the same EndNote Online account. This is suitable for a home/work computer set up.

The Northwestern University Library has produced [guides](#) showing how to set up the EndNote Web account and sync references. Another excellent guide is available [here](#).

How do I create an EndNote Online account so I can sync my library online?

EndNote Online (formerly Web) is an online back-up and collaboration option for EndNote. An excellent guide and tutorial on how to do this is available [here](#).

How do I use EndNote with Pages for Mac?

EndNote can be used very easily with Pages. Check out this handy video for details: <http://www.youtube.com/watch?>

Can I use EndNote when collaborating with colleagues on papers?

Yes, you can, although there are different recommendations depending on your situation. The options are explained in this [guide](#) from the University of Adelaide.

My in-text citations in Word have been replaced with mysterious code strings. What can I do?

Field codes in your Word document can be activated for a number of reasons. If this happens, there's an easy fix. To remove the code for a single citation, right click on the code and click "Toggle Field Codes". To remove the field codes from the entire document, select Alt + F9 on your keyboard.

I cannot format the references in a Table (office word 2008 for Mac, and Endnote X2).

If you've inserted references within a table in Word and you receive this error message "A COM exception has occurred. The number must between", go into table properties for the table(s) in which the references are inserted and change the text wrapping to none. The user who reported this issue was running Word 2008 for Mac, EndNote X2, and OS X.5.6.

Can I email an EndNote library or group to someone else?

Yes, you can. Your EndNote library can be attached to an email just like any other file. However, we recommend creating a compressed version of the library first (a file that includes your library and its corresponding data folder).

- With your library open, go to File - Compressed Library (.enlx)
 - On the next screen, choose With or Without file attachments - it's best to choose "without" because including any attached PDFs will likely make the file too big to email
 - Leave at All References in Library, or if you would like to just send a group of references, select the group option and the group of interest
 - Click Next and save the file to a location of your choice
 - The compressed library file icon will look different from the original EndNote library file icon: it has a clamp/large C on it, and it will be called an archived library with the file extension .enlx
 - Attach this file to your email. The recipient will need to have EndNote installed to open it.
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