ENDNOTE TIPS

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Change the Endnote Layout

Depending on whether you are using a Windows or Mac computer, you may find the Layout options in a different place, but on either system, it will be on the main EndNote display. This allows you to open or close the Groups list, show the Reference Panel on the bottom or right side of the screen, and split the Reference Panel between reference information and the pdfs or display only one at a time. See the screenshots on this page and the next for examples:

**Layout Menu**

![Image of Layout Menu]

Display with Groups Panel visible and the Reference Panel split.

![Image of Layout with Groups Panel and Reference Panel Split]

![Image of Display with Groups Panel and Reference Panel Split]
Display with Reference Panel on the right side of the screen, showing either the Reference or PDF

Display with Reference Panel on the right side, split view displaying both reference information and the PDF
Preview a citation style

To preview how a citation will look in a bibliography, choose your preferred citation style and then the Preview tab next to the Reference details tab. This Preview tab may be in a different place if you have changed your Layout options. If your preferred citation style is not in the dropdown list, choose Select Another Style to see the full list of available citations. Once you have picked a style from the full list, it will display in your preferred list going forward.
If you have a reference with incomplete information, you can update that information without editing the reference manually. Choose the reference(s) you would like to update, then choose Find Reference Updates from the References menu. You can choose to update all the fields, only the ones that were empty, or choose Edit Reference to edit specific fields. This works best if your reference already has the correct DOI information. (If you need to add a new reference to your library manually and you have a DOI, you can create a new reference with only the DOI and use Find Reference Updates to fill in the rest of the fields.)
Email a Citation

To email a citation, first pick your preferred citation style and check the Preview window to see a preview of the reference style (see Preview a Citation Style on pg 4). Then select the reference you would like to email, right-click (or cmd-click) on the reference and choose Email Reference from the list. Note: You can only email one reference, this option is not available if multiple references are selected.
Create a quick reference list (or copy a single reference)

As with previewing a reference (see pg 4), use the dropdown list in EndNote to select the citation style that you want to copy the reference(s) in. Select the reference or references that you would like to copy. Choose **Copy Formatted** from the **Edit** menu. Then paste the copied references into a blank Word document or other text document.
Edit a specific field in multiple references

To edit the same field in multiple references, start by adding all the references you want to change into one group. This tool will change all the references within one group. Once you have your group of references ready to edit, choose Change/Move/Copy Fields from the Tools menu. In this example, we will be removing the URLs from all our references. This is something you may want to do if you have imported the references from a database and all the URLs are for that database and not the publisher website.

In the tool, choose the field you want to change from the dropdown list. In this case, the URL field. Then choose what you would like to do. In this case, Clear Field. Once you click OK, you will see a warning that you are going to edit a certain number of references. Make sure this is the set you wanted to edit before proceeding.
Create a compressed library (for emailing or backup)

A compressed library file can be used for emailing to a collaborator, or for creating a backup copy of your library as it currently is. Backing up your library can be useful if you are updating your library regularly or working on a large project. This will ensure that if anything happens to your library, you will have a recent backup that you can load without losing all of your work. You can also save the compressed library file to a backup drive or cloud storage option to prevent library loss if anything happens to your computer.

To create a compressed library:

1. Choose **Compress Library** from the **File** menu.
2. Decide whether you would like to include file attachments (this will take longer when creating the file)
3. If you are creating a backup, include all references. However, if you are emailing references, you can choose a particular group without sending all your references.
4. The next step is to save your file. It is strongly recommended to rename your file to differentiate it from your main library. For backups, adding the date to your file name will tell you when the backup is from. For emailing, a new name can tell the recipient what is inside.
5. Creating the actual compressed file will take a minute or two. It is best to let the process finish before trying to do anything else on your computer.
Create my own citation style

If a citation style is not creating the exact reference style that you want, you can make changes to create a custom style.

1. Choose Output Styles section in the Edit menu, then select Open the Style Manager.
2. Choose the citation style that is closest to what you are looking for. Right click and choose Edit Style.
3. Before making any other changes, give your style a new name, then Save As to create a new style in the manager.
4. Once you have created the new style, there are many changes you can make. The example screenshot demonstrates changing the titles in the bibliography to always display with only the first word capitalized (sentence case).
**Rename my pdfs**

When a pdf is attached to a reference, EndNote creates a copy of the pdf within the EndNote library. Since many pdfs from publisher websites or databases have names that are a string of numbers or letters, you may want to rename the pdf with more useful information. To choose a file naming format, go to the **PDF Handling** section of the **EndNote Preferences**. There are some preset options available, or you can choose any three reference fields for a custom name. Once you have picked a naming convention, all new pdfs will be renamed on import.

To rename pdfs already in your library, highlight the references with attached pdfs, then select the **File Attachments** section of the **References** menu, then choose **Rename PDFs**.
Start EndNote with the same library open every time

If you are working with collaborators, or on multiple projects, that use more than one EndNote Library, you may want to ensure that you start EndNote each time with your preferred Library(s) open. You can set this in the Preferences menu of EndNote under Libraries.

1. Open only the Library(s) you would like to open when you start EndNote.
2. Open your EndNote Preferences.
3. In the Libraries section, choose Open the specified libraries.
4. Then Add Open Libraries to populate the list with the Libraries you currently have open.
Properly format organization names

When the author of a document is an organization, adding a comma at the end of the organization name will stop EndNote from treating it like the name of a person. To add the comma, select the reference you need to change, then choose Edit References from the Reference menu. Find the Author list and add a comma at the end of the organization name. Then make sure to Save your updated reference from the File menu. When you close the reference window (the smaller window within the larger EndNote window), the organization name should display correctly.

Global Strategy for Further Reducing the Leprosy Burden and Sustaining Leprosy Control Activities 2006-2010 - Operational Guidelines

Group Author(s): World Health Organization
LEPROSY REVIEW Volume: 77 Issue: 3 Pages: 230-+ Published: SEP 2006

Get It

Reference Preview


Author
World Health Organization,
Edit the font formatting of my bibliography in my Word document

1. In Word, after adding a citation to your document, click on Edit & Manage Citations on the EndNote toolbar.
2. From there, select Configure Bibliography from the Tools menu.
3. This will allow you to change the title, font, spacing, etc. of your bibliography.