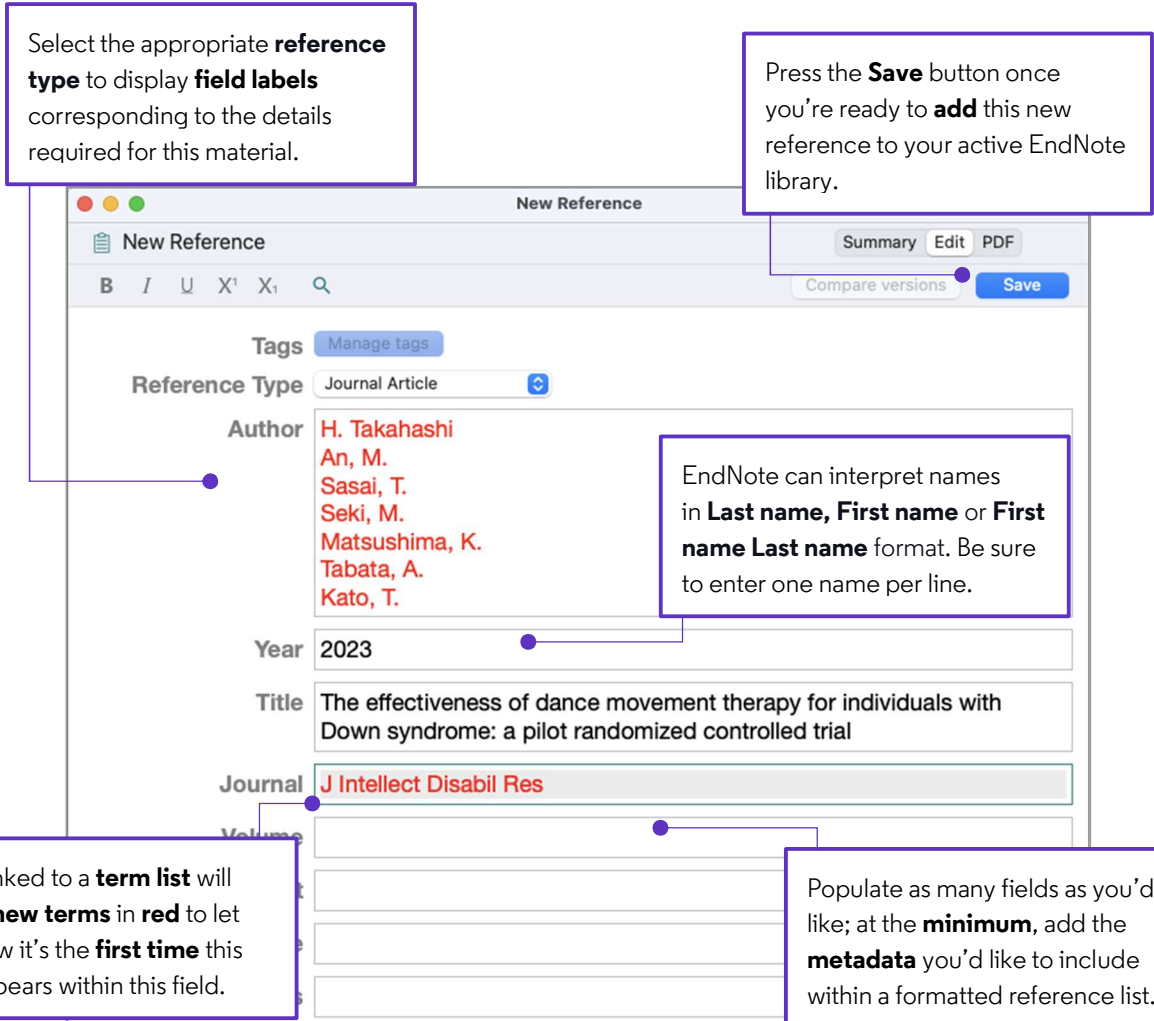# Adding a new reference

EndNote 21

You can automatically capture new references in your EndNote library without manually populating the information. You also have the option to manually create an entry in your library for any reference materials you can't capture.

1.   Create a **new** entry manually by clicking **References > New Reference** with your EndNote library open.

New Reference window

Select the appropriate **reference type** to display **field labels** corresponding to the details required for this material.

Press the **Save** button once you're ready to **add** this new reference to your active EndNote library.

EndNote can interpret names in **Last name, First name** or **First name Last name** format. Be sure to enter one name per line.

Fields linked to a **term list** will display **new terms** in **red** to let you know it's the **first time** this term appears within this field.

Populate as many fields as you'd like; at the **minimum**, add the **metadata** you'd like to include within a formatted reference list.
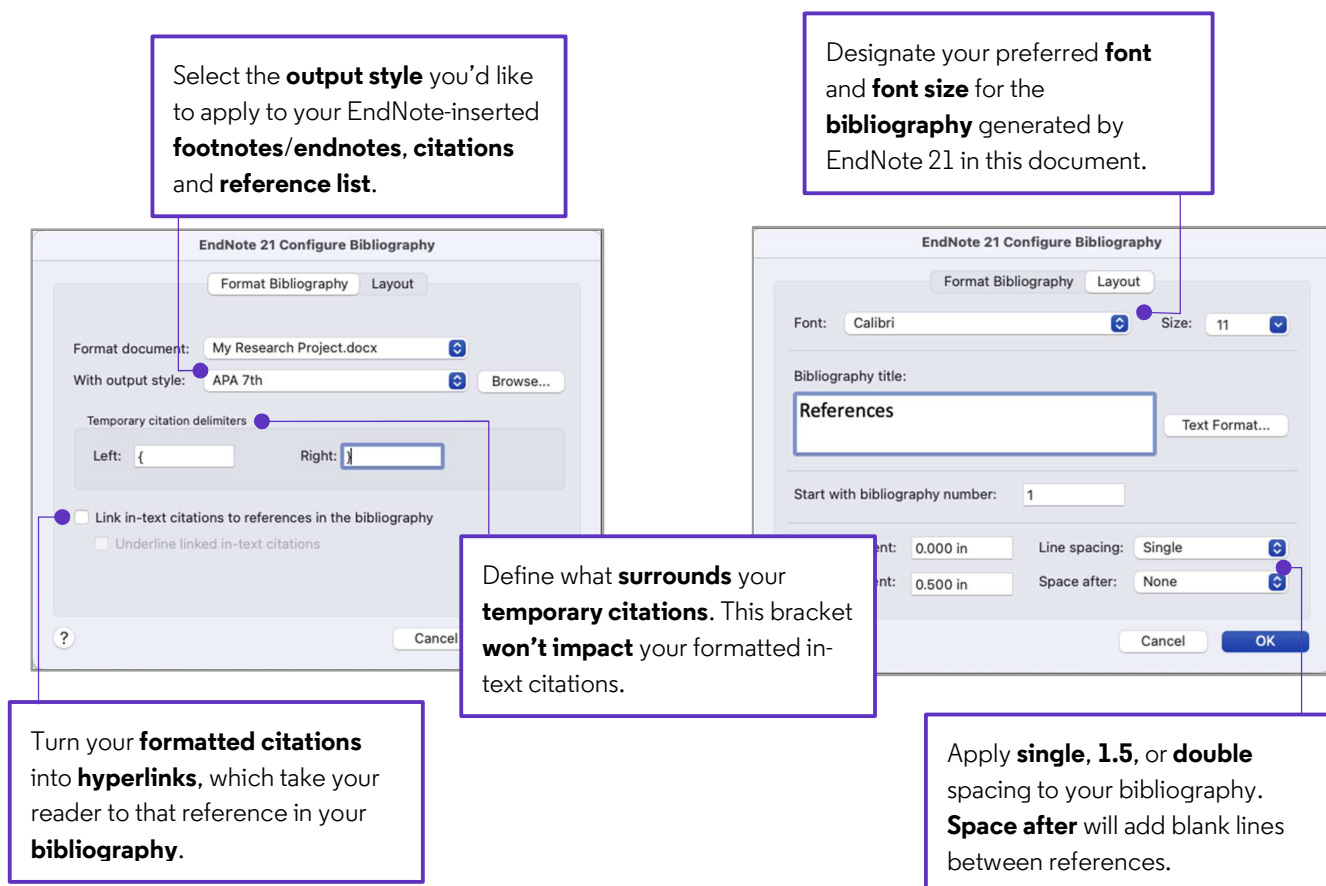
![Clarivate™ logo]

Cite While You Write: Configure Bibliography

EndNote 21

Your designated EndNote output style dictates most in-text citations and bibliography formatting. However, you can customize document-specific settings with the Configure Bibliography feature.

1. Open a Microsoft Word document you'd like to customize. Press the diagonal arrow shortcut in the bottom right corner of the Bibliography section on the EndNote 21 tab to access **Configure Bibliography**.

Configure Bibliography window

Select the **output style** you'd like to apply to your EndNote-inserted **footnotes/endnotes**, **citations** and **reference list**.

Designate your preferred **font** and **font size** for the **bibliography** generated by EndNote 21 in this document.

EndNote 21 Configure Bibliography

Format Bibliography | Layout

Format document: My Research Project.docx

With output style: APA 7th   Browse...

Temporary citation delimiters

Left: {   Right: }

☐ Link in-text citations to references in the bibliography
  ☐ Underline linked in-text citations

?   Cancel

EndNote 21 Configure Bibliography

Format Bibliography | Layout

Font: Calibri   Size: 11

Bibliography title:

References   Text Format...

Start with bibliography number: 1

ent: 0.000 in   Line spacing: Single
ent: 0.500 in   Space after: None

Cancel   OK

Define what **surrounds** your **temporary citations**. This bracket **won't impact** your formatted in-text citations.

Turn your **formatted citations** into **hyperlinks**, which take your reader to that reference in your **bibliography**.

Apply **single**, **1.5**, or **double** spacing to your bibliography. **Space after** will add blank lines between references.

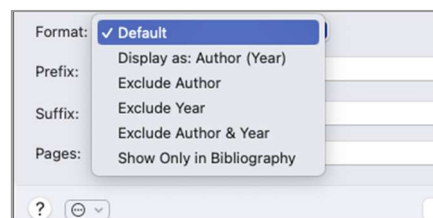# Cite While You Write: Edit & Manage Citation(s)

EndNote 21

Formatting guidelines sometimes require the customization of in-text citations so that specific citations are formatted differently. The Edit & Manage Citation(s) feature of Cite While You Write allows you to make changes on a citation-by-citation basis.

1. Start the citation customization process by **highlighting** the formatted in-text citation that you'd like to modify and then press the **Edit & Manage Citation(s)** shortcut found on the **EndNote 21** tab in Word.

Edit & Manage Citation(s) settings

2. Use the **Format** menu to customize the appearance of an **individual** in-text citation. You can present author information **outside** the parenthetical citation, **leave out** author details, the **year**, or **both**. You can also instruct EndNote to display this reference in your **bibliography only**.

3. Include a preceding word or phrase to your in-text citation by adding custom text to the **Prefix** field. The **Suffix** field functions similarly, but the Suffix field text appears at the end of your parenthetical citation. EndNote output styles set up to include **Cited Pages** will display a page number or range of pages entered in the **Pages** field within an in-text citation. This information helps your reader know where they can find a concept or other data you include within the source work you're referencing.

4. Press **OK**, and your citation customizations appear in real-time with **Instant Formatting** enabled.

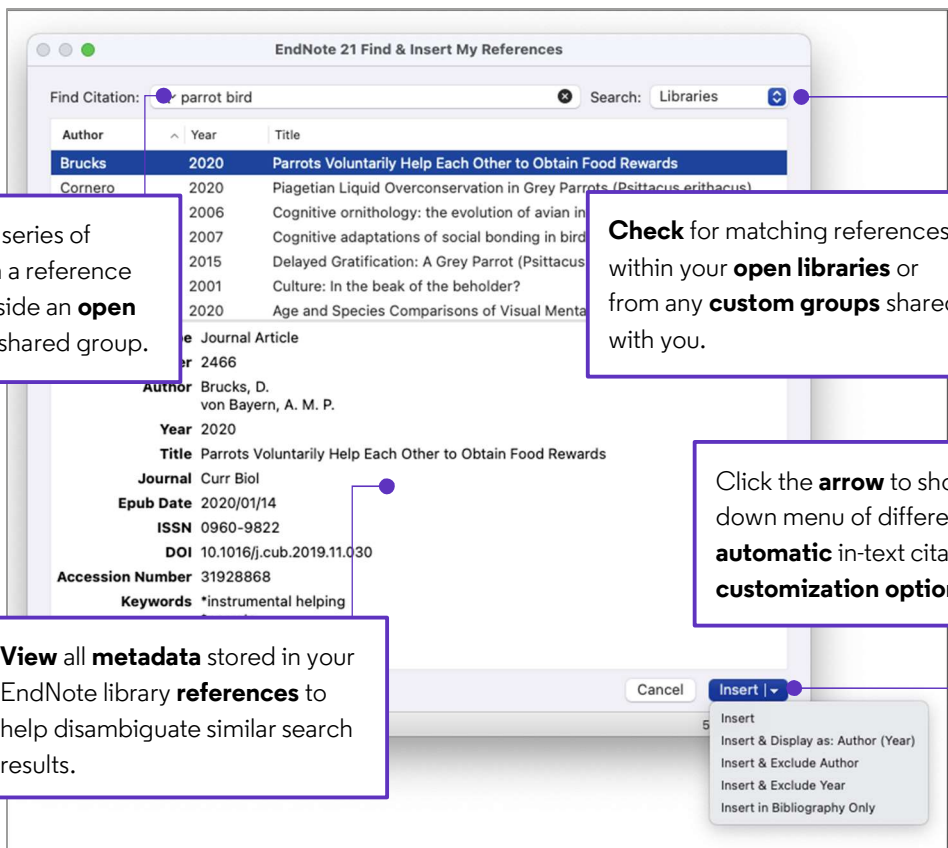Find these features and more on the EndNote 21 Edit and Manage Citation(s) window.

Cite While You Write: Insert Citation

EndNote 21

Stay in Microsoft Word while citing references from your EndNote library with Insert Citation.

1. **Position your cursor** within the body of text where you'd like to add a citation and then press the **Insert Citation** shortcut found on the **EndNote 21** tab in Microsoft Word.

Insert Citation window

Search for a **word**, series of **terms,** or **phrase** in a reference you'd like to cite inside an **open** EndNote library or shared group.

Check for matching references within your **open libraries** or from any **custom groups** shared with you.

View all **metadata** stored in your EndNote library **references** to help disambiguate similar search results.

Click the **arrow** to show a drop-down menu of different **automatic** in-text citation **customization options** to apply.

Want to insert references by choosing them in your library? Try out Insert Selected Citation(s).

Cite While You Write: Insert Selected Citation(s)

EndNote 21

Would you prefer to switch back to your EndNote library to highlight the references you want to insert within your Microsoft Word writing project? The Insert Selected Citations(s) command makes this possible.

1. **Position your cursor** within the body of text where you'd like to add a citation and then press the **Go to EndNote** shortcut found on the **EndNote 21** tab in Microsoft Word.

Insert Selected Citation(s) steps

2. In your EndNote library, **highlight** the reference you'd like to cite. If you want to create a **grouped citation**, hold down the **command** key as you click subsequent references.

3. Press the **Insert Selected Citation(s)** library shortcut. Alternately, press **control + 2** while in EndNote 21 to activate the Insert Selected Citation(s) command.

4. You'll **return** to your Microsoft Word document, and EndNote 21 will **create** an in-text citation containing your desired references. Your formatted bibliography will also update automatically with **Instant Formatting** enabled.
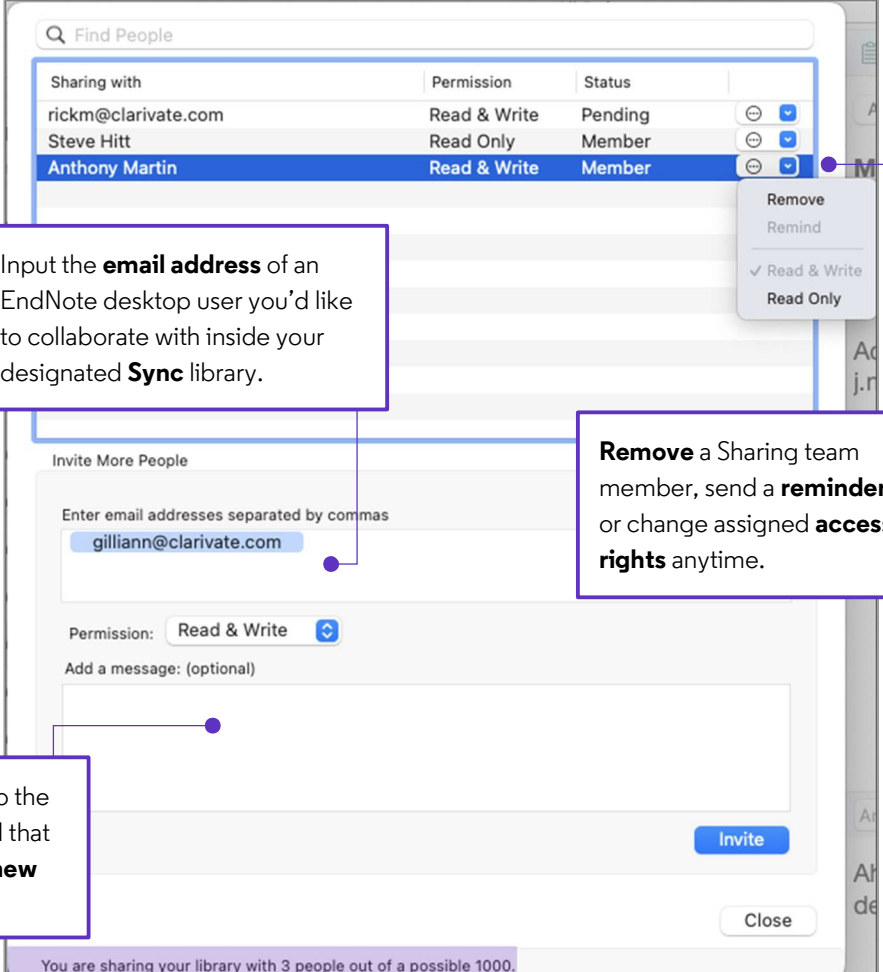
Sharing in EndNote 21

EndNote™

Collaboration is essential to your research. The Library Sharing feature in EndNote 21 supercharges teamwork by empowering Sharing teams with up to 1,000 collaborators using EndNote desktop.

1. After configuring **Sync**, open your designated Sync library and click **File > Share** to set up your Library Sharing team.

Sharing window

Input the **email address** of an EndNote desktop user you'd like to collaborate with inside your designated **Sync** library.

Remove a Sharing team member, send a **reminder email**, or change assigned **access rights** anytime.

Add an **optional** message to the automated **invitation email** that EndNote 21 will send your **new** team member.
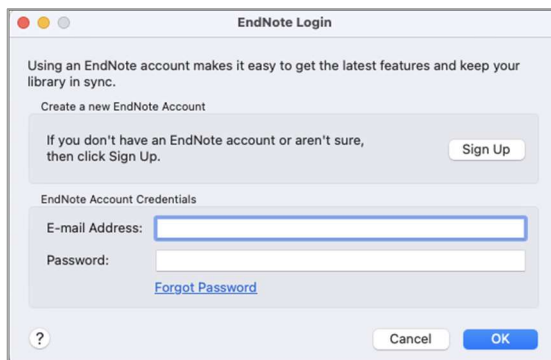
Syncing in EndNote 21

EndNote™

You work in multiple locations, and you might prefer having access to the contents of your EndNote library available on all your devices. The Sync feature in EndNote 21 facilitates this goal and increases your productivity.
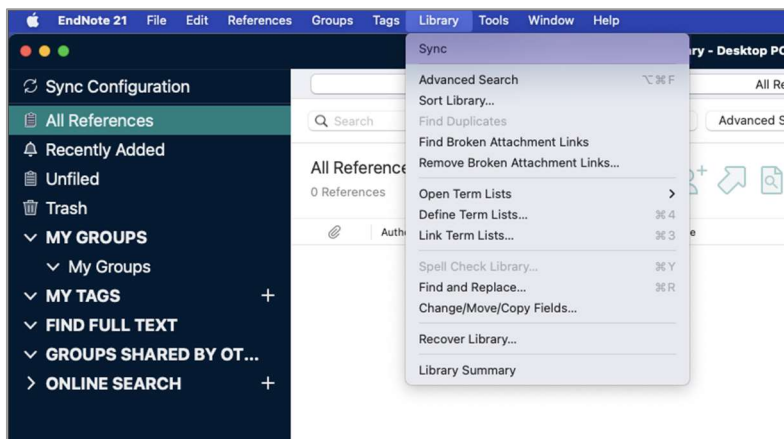
1. Start configuring library syncing by opening the EndNote library you'd like to **designate** as your EndNote **Sync** library and then click **Library > Sync**.

Sync steps

2. Press **Sign Up** to create a new EndNote Web account or sync with an **existing EndNote online account** by inputting your login credentials.

3. By default, **every 15 minutes**, EndNote 21 will check your library for changes to **send** or **receive**. Click **Sync Status** to confirm that all reference details synchronize **between** your desktop library and EndNote Web account.

4. To sync on a **secondary computer**, create a blank EndNote library by choosing **File > New**. Click **Library > Sync** to input your EndNote Web account credentials and perform your initial sync to copy down all existing library information.
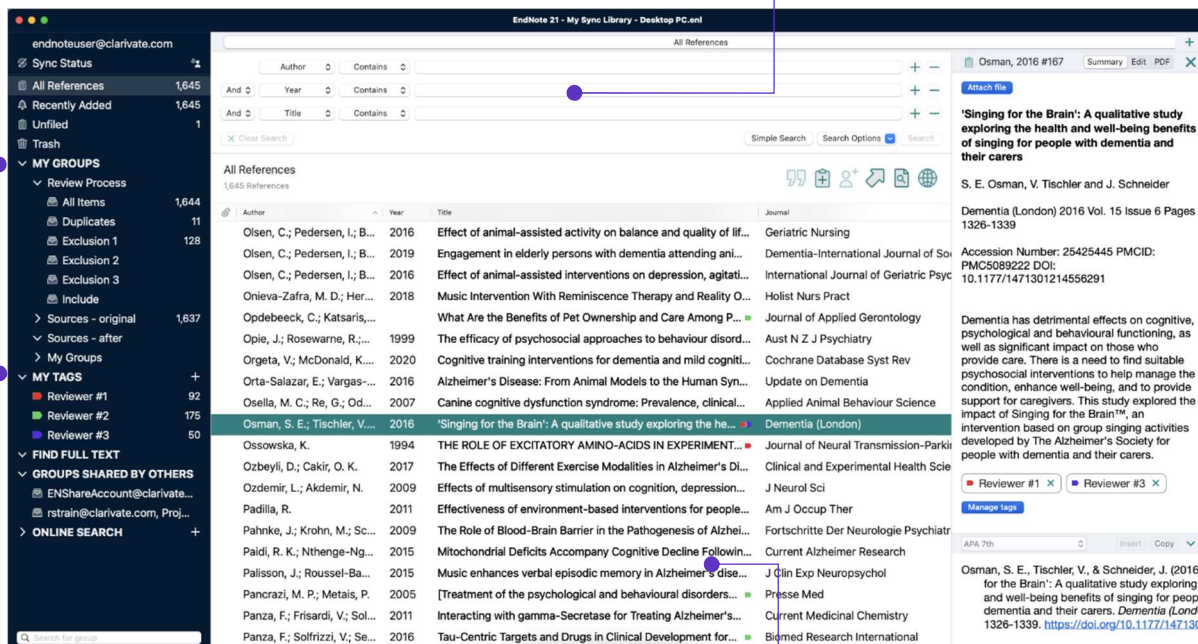
EndNote 21 library window

EndNote™

EndNote 21 takes the smart redesign introduced in EndNote 20 and adds a deeper level of library organization. This guide should help you quickly become familiar with the EndNote 21 library window components.

The **Groups** panel shows **default** library **groups** and **groups**/**group sets** you created for your research projects.

Use **Advanced Search** to query a **specific** field or craft a **multi-parameter** search. Switch to **Simple Search** to search all fields.

The **Summary** screen displays **vital** reference details. **Alter** data from the **Edit** screen or **read** an article from the **PDF** screen.

The **tags** system provides a new ability to **visualize** sub-topics in your library groups or provides an **alternate** organization system.

The **Reference List** panel shows the individual references **stored** in your EndNote library, also known as library **records**.

The **Preview** screen shows you how a reference would appear **formatted** with the selected EndNote **output style**.