

ENDNOTE Workbook

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ENDNOTE Workbook

Overview

EndNote is software that allows you to store, organise and manage your references. These references can be linked to your word documents to instantly create in-text citations and bibliographies in the referencing style that you require.

Software

EndNote software can be downloaded from the Library's EndNote guide: *Library homepage > Guides > Research > Endnote > Software*

* Please read the download instructions carefully.

Part 1: Setting up your EndNote Library

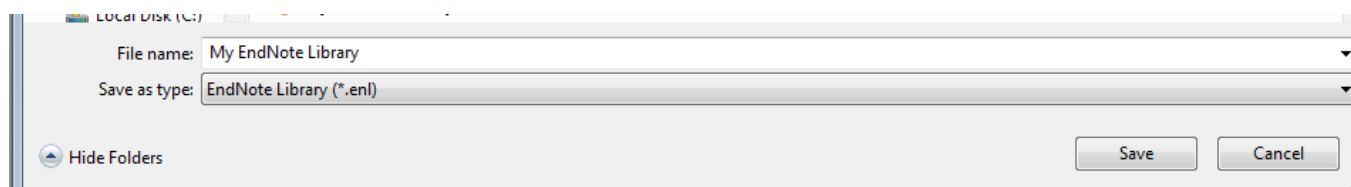
In order to begin using Endnote you will first need to create an Endnote Library, this is the working file you will be using from now on. Your Endnote library can hold thousands of references, it is important that you use one Endnote library to manage your reference. Creating multiple Endnote libraries is **NOT** recommended as this may cause formatting problems.

An EndNote library is a collection of references. All elements of a reference i.e. author, title, publisher, journal details etc., as well as the PDF, notes, abstracts and tables can be saved together.

Creating an EndNote Library

Save all your references in **ONE** library.

1. Open the EndNote program
2. Select *Create a new library*, or *File > New* to start a new Library
3. The default name will be 'My Endnote Library' you can rename this to something unique to you and save your library



Note:

EndNote will automatically create an associated .DATA folder for your new library. Do not delete this folder, EndNote uses the .DATA folder to store term lists and any attachments (pdfs, images etc.) saved in your library.

Endnote uses the DATA folder along with your Endnote library file to store your references and data. These two files need to be kept together. Do not move your Endnote Library file to a different folder as this can break the communication with the DATA folder. These can be saved in a single file by using the compressed library option.

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Saving a Compressed copy of your EndNote Library

You can save your complete library to a single compressed file to easily back up your library, save on your computer or in the cloud, send a copy to a colleague or to move between different computers.

In EndNote

1. Click on *File > Compressed Library(.enlx)...*
2. Select required option/s
3. Choose a location to save the Compressed Library
4. Save Compressed Library

Note: The compressed file contains both the .ENL library and the .DATA folder and its contents.

*Always open the compressed library on your computer DO NOT open it from within the cloud or a USB as this may corrupt your library.

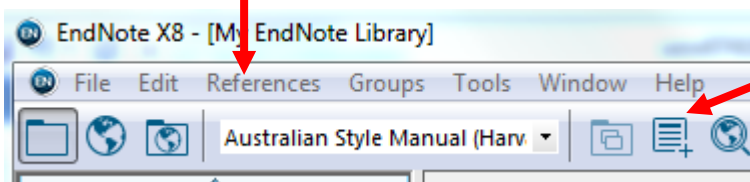
Manually Entering References into an EndNote Library

References can be added manually or exported from databases using direct export.

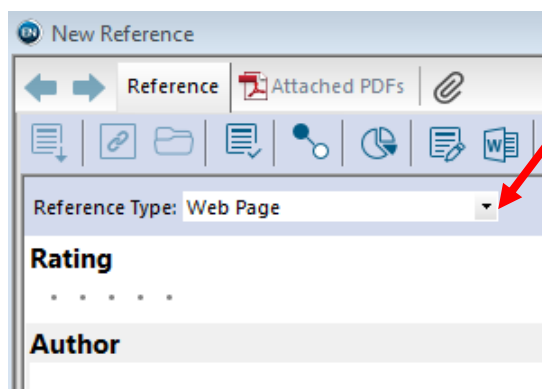
Typing References into an EndNote Library

EndNote contains inbuilt reference types including book, conference proceedings and journal articles. Additional reference types can be created. There are three ways to open a New Reference window.

1. From the a).*References* menu, select *New Reference* OR select the b).New Reference icon OR c).Press CTRL-N



2. The **New Reference** window will appear with Journal Article as the default reference type.
3. Use the drop down menu to change the **reference type** to match your reference e.g. Web Page



4. Type information into the appropriate fields
5. Close the New Reference window by clicking on the arrow in the top right of the window, it will ask if you want to Save, select Yes.

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Punctuation

- Do not include any punctuation or formatting e.g. brackets (), or quotation marks ""
- Text should remain as 'plain text' unless a special font is required for a term or character e.g. species names may need to be italicised

Authors

- Enter one author per line, separate initials with a full stop and a space e.g. Smith, M. T.
- Include a comma after the surname. The comma is important as it identifies the surname
- For corporate authors include the comma after the last word e.g. World Health Organisation,
- Use a double comma for corporate authors with a comma in the middle e.g. Department of Health,, NSW,
- Do not use hyphens in first names e.g. Mak, Wai Ming **not** Mak, Wai-Ming
- Hyphens can be used in surnames / family names e.g. Toh-Sung, Li
- Authors such as de Young, e.g. enter as de Young, J. R.

Other fields

- Use the keywords field to describe the content of the reference. Enter one keyword per line.
- Use the URL field to add a live URL link.
- The Notes, Research Notes, and Abstract fields can store many pages of text
- Use Research Notes to store your own notes
- Use the File Attachments field to store PDF files and other file types
- Use the Figures/caption fields to store a graphic file/description that can be inserted into Word

Importing References into an EndNote Library

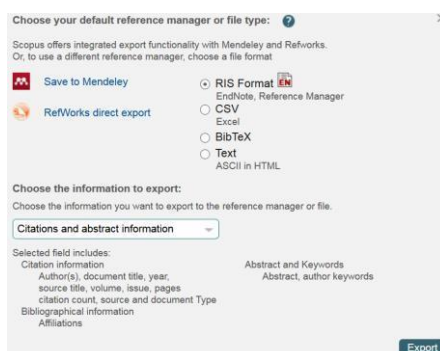
Database records can be imported directly into your EndNote Library. Most databases use the word *Export* for this process. Depending on the database the export option may be listed under the save options. Endnote uses the Research Information Systems (RIS) format. For more information see the *EndNote guide > Learn to use EndNote > EndNote Importing Guide* at <http://uow.libguides.com/endnote>

Exporting Records from Library Search box

1. Search, then add records to be saved by clicking on the folder on the right side of each record
2. Select *My Folder* (top of the screen)
3. Select the items you would like to export to Endnote (*make sure the correct option is selected*)
4. Click *Export, Save*

Exporting Scopus Records

1. Search Scopus, then mark records to be saved
2. Click on *Export*
3. Select *RIS format*
4. Choose preferred *Output* eg. Citations and abstract information
5. Click on *Export*, then *OK*



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Notes:

- On some computers you will be asked to *Open* or *Save* the .ris file. *Open* the file so the references are imported into EndNote. If you save the file, the file goes to your computer Downloads. From Downloads, Open the file to import into Endnote.
- You can set your browser up to always open these file types with Endnote. Firefox and Chrome will work best with Endnote.
- *Imported References* is a temporary group within your EndNote Library. It is replaced each time a new set of references are imported and is deleted when the library is closed.

PDF Files

PDF files can be stored, viewed, annotated and highlighted within Endnote. There are multiple ways of adding PDF files to EndNote. A copy of the original file is saved in your EndNote library's .Data folder.

File Attachments

Use the File Attachments field to store 45 different file types, including pdf and jpeg files. The Library window will show a paper clip when a file is attached.

Attach a file (including a PDF)

1. Open the reference
2. Click in the *File Attachments* field
3. Right click and select *File Attachments > Attach File*
4. Browse for the file



Find full text

EndNote may be able to find and attach a PDF, this is a good option to use if you have a large number of references.

1. Highlight references you would like to find the full text for.
2. Click on the *Find Full Text Icon* or, go *References > Find Full Text > Find Full Text*

Note: This does not always work well

Import a PDF file/s

1. Click on *File > Import*
2. For single files choose *File* (for folders of files choose *Folder*)
3. Change the *Import Option* to PDF
4. Browse for the file/folder

Setting up an automatic PDF import

1. Create a folder for PDF files
2. Click *Edit > Preferences > PDF Handling*
3. Tick *Enable Automatic Handling*
4. Browse for PDF folder

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Imported PDF records

1. Imported PDF's that have a DOI will include full citation details + PDF
2. If there is no DOI, imports will include the PDF, PDF name in the title field and no other citation details. These older PDF files have no information attached to the PDF. Open the PDF and copy/paste the details into the record

Author	Year	Title
		<document(2).pdf>
		<Ascilite2003ILIP.pdf>
		<Investigating the Age...
Bischoff, J. ...	2012	Does nerve identificati...
Dangelico,...	2013	Developing Sustainabl...

Updating Records

Some references can be updated from EndNote. EndNote cross-checks DOI information with subscribed databases. Some databases/PDF files do not include DOI information.

1. To run an update on all library records click *References > Find Reference Updates*. On campus authentication may be required. Choose between alternative records. Note that new added records do not have PDF files attached
2. To update an individual record, click on the *Find Reference Update* button within the record

Figure and Caption Fields

The Figure field in any reference type can contain one graphic file (all file types, e.g. excel, png, etc). Enter a description in the Caption field if the graphic file is to be inserted into a Word document. Use the reference types *Chart/Table*, *Figure* or *Equation* for your own work. Details from these reference types do not appear in the bibliography when the graphic is inserted into a Word document. A copy of the original graphic file is stored in the .Data file. Some graphic files like excel and power point can be edited from Endnote. Editing Excel creates an original Excel file and a working copy file in the .Data folder.

Attach a Figure

1. Open the reference
2. Click in the *Figure* field
3. Right click and select *Figure*
4. Browse for the file

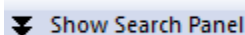
Inserting a Figure, Chart, Diagram or Table into a Word document

2. Select the *EndNote tab*, click *Insert Citation > Insert Figure*
3. Locate the appropriate citation
4. Click *Insert* and the selected image will appear in your document
5. The figure or table number will appear within the text

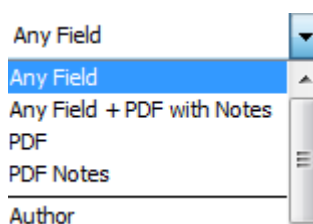
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Searching for References

1. From the *Tools* menu, select *Search Library* (or *Show Search Panel*)

A rectangular button with a light blue background and a dark blue border. On the left side, there is a small downward-pointing arrow icon. To the right of the icon, the text "Show Search Panel" is written in a dark blue, sans-serif font.

2. Choose the search option, e.g. *Any field*, *author*, *PDF*



3. Enter search terms. Additional search boxes can be added using the *Add* button

Searching notes:

- *Any Field + PDF with Notes* searches all fields of the Endnote record, PDF text and PDF Sticky Notes
- *PDF* searches the PDF text only
- *PDF Notes* searches PDF Sticky Notes only
- EndNote truncates automatically eg. *evaluat* will retrieve references with *evaluate*, *evaluation*, *Evaluating*

Saving References into Groups

Groups enable you to organise your Library into smaller groups for easier viewing. A group is a subset of references that exist in your main library. Deleting a reference from the subgroup does not delete it from your main library. However, deleting a reference from *All References* will delete it from all groups in your library.

To create a New Group and add References

1. Right click on *My Groups* (or click on *Groups* menu)
2. Select *Create Group*
3. Name your group
4. Select references to be copied into the Group
5. From the *Groups* menu, select *Add References to*

Smart Groups

Smart groups use search criteria to automatically update groups as existing references are edited or new references are added to the EndNote library.

To create a Smart Group

1. Right click on *My Groups* (or click on *Groups* menu)
2. Select *Create Smart Group*
3. Name your group. Add search criteria, click *Create*

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Copying References between Libraries

1. Select the references to be copied
2. From the *Edit* menu, select *Copy*
3. Open the library to which you want to add the references. From the *Edit* menu, select *Paste*

Part 2: Linking Word with your EndNote Library

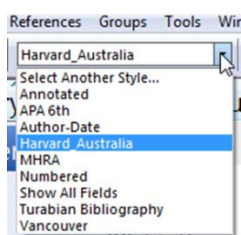
Cite While You Write™ links Microsoft Word and EndNote references to instantly create in-text citations and bibliographies in the referencing style that you require.

EndNote Referencing Styles

EndNote styles control the way a bibliography and in-text citations appear in a Word document. The current referencing style is shown at top of the EndNote library window. EndNote includes hundreds of styles including common styles such as APA, MLA and many journal referencing styles. Additional styles can be downloaded from the EndNote website, google or the EndNote library guide.

Choosing a Style

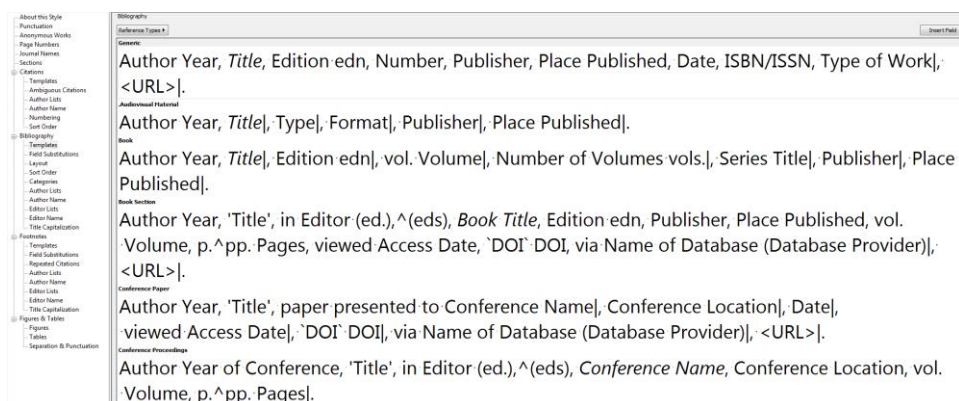
1. At the style box choose another style or click *Select Another Style*



2. To view how the reference will appear in the bibliography click *Preview*

UOW Harvard Style

A style has been prepared to match the [UOW Harvard Style](#). The style can be downloaded from the library's EndNote guide: *EndNote guide* > [Reference Styles](#) > *Australian Style Manual (Harvard - UOW)*. The image below shows the section of the style controlling the bibliography.



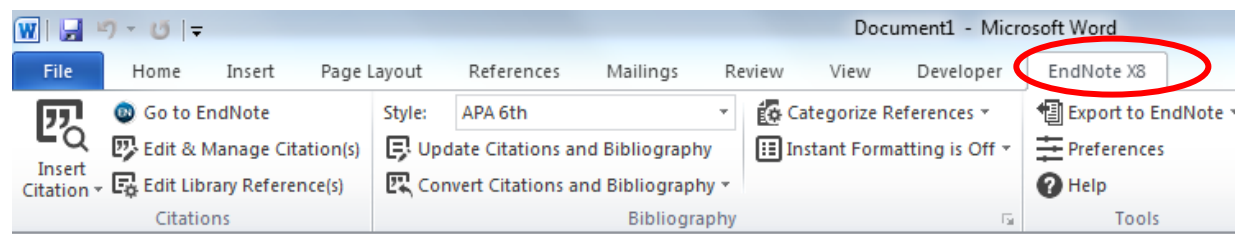
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Installing the *Australian Style Manual (Harvard - UOW) style*

1. Click on the link and open the file. Double click on the opened file
2. This will open the new Style in Endnote. Click on *File > Save As*. Change the name of the file to something easy to recognise, like UOW Harvard. Click *Save*
3. Close the Style window using the red cross top right of style window. The style will now be saved in the correct EndNote Style folder
4. To check go: *Edit > Output Styles > Open Style Manager >* locate new style in list

Inserting Citations from an EndNote Library into a Word Document

When you install Endnote it will also install an Endnote toolbar in Microsoft Word. Click on the Endnote tab to activate the toolbar.



An example of a Word document with in-text citations and a bibliography

Williams (1988) claims another problematic area of student learning is the development of professional values and understanding of clients' and colleagues' needs. A study in the context of veterinary science (Heath 1990, p.34) found that both teachers and students regard these aspects of professional competence highly, but students and novice veterinarians complain that they feel inadequate in their dealings with clients and superiors (Barnett 1983; Watkins 1983).

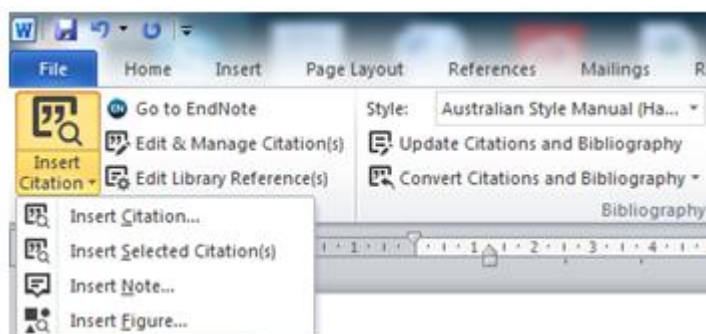
Bibliography

Barnett, S. A. (1983). "The theory of biology. A case study." *Studies in Higher Education* 8: 23-32.
Heath, T. (1990). *Education*. Boston, McGraw-Hill Higher Education
Watkins, D. A. (1983). "Depth of processing and the quality of learning outcomes." *Instructional Science* 12: 49-58.
Williams, B. (1988). *Review of the Discipline of Engineering*. Canberra, Australian Government Publishing Service.

To Cite References and Create the Bibliography

1. Open the EndNote library & highlight the reference/s you want to cite
2. Open your Word document, click on the Endnote toolbar
3. Under Insert Citation click the drop down and select *Insert Selected Citation(s)*
4. Repeat for each reference you need to cite
5. The in-text citation and bibliography will automatically format in the selected output style

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Modifying In-Text Citations

Modify in-text citations to include page numbers, see also references or exclude an author's name

1. Click on the citation to highlight it
2. From the EndNote toolbar select *Edit & Manage Citations* (OR right click > *Edit Citations ...*)
3. Select from the available options, then click **OK**

Other Changes to in-text citations

... this discussion in 2001 (Higgs)... Select **Exclude Year from** the Formatting drop down

... this theory (see also Higgs 2001)... Type **“see also”** plus a space into **Prefix box**

...(Higgs 2001, chapter 3)... Type **“chapter 3”**, with comma & space, into **Suffix box**

...in 1956, Brown (cited in Higgs 2001, p. 89)... Type **“cited in”** plus space into **Prefix box**, and “89” into the Pages box

Creating a Subject Bibliography

You can create a bibliography from your Library that is divided into subsets of your choice. For example the subsets might be the different reference types, or keywords, authors, or publishers.

In EndNote click on **Tools, Subject Bibliography**, from the list of fields, choose the ones you want your generated reference list to be divided into (it is normally best only to pick a small number, such as one or two, but you can pick as many as you wish), then click **OK**.

A list of the different possibilities for these fields then appears. You can Select All of these, or make a choice. Then click **OK**. Your subject bibliography appears. You can select the reference style, or change layout (however, if you change the layout, the style of your bibliography might not be totally correct any more). Use Print Preview to see how the references will be displayed. You can then print or save (in Rich Text Format, which is similar to Word).

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Correcting Mistakes in References, In-Text Citations and Bibliographies

Punctuation and the “look”/layout of an in-text citation or bibliography are controlled by the style. Edit the style (or change styles) to correct. For spelling mistakes and incorrectly displayed information correct the EndNote record. Make changes to any EndNote linked information (in-text citations or bibliographies) in EndNote and then update the Word document by clicking on “*Update Citations and Bibliography*” in the Endnote toolbar.

Editing a Style

To edit a style, click: *Edit > Output Styles > Select the style > Edit “style name”*. More details about editing a style are found in the Library guide (or in EndNote Help). If you decide to edit a style, always save it with a different name. *EndNote Guide > Reference Styles > More* at <http://uow.libguides.com/endnote>

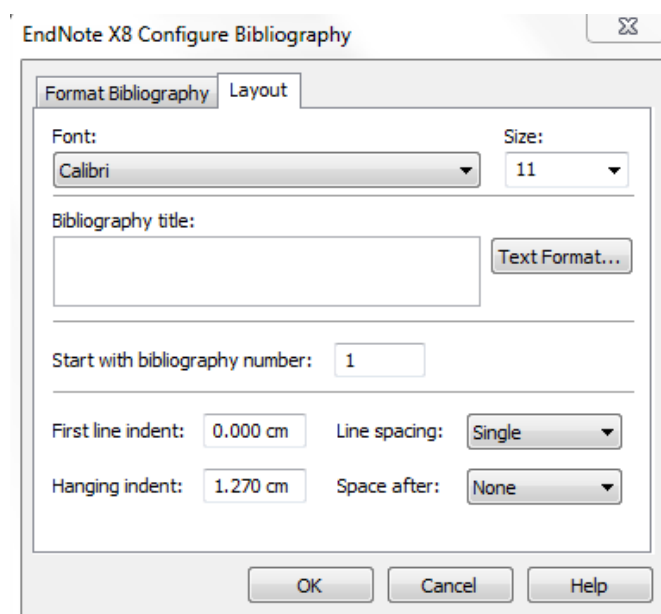
Editing Reference Information

1. Open the Word document and the EndNote Library
2. Within the Word document, click on the in-text citation to highlight it
3. Click on Edit Library Reference(s). The corresponding reference within EndNote will open
4. Edit, then close the reference
5. Return to the Word document and click on Update Citations and Bibliography

Formatting the Bibliography

The bibliography may be modified. Modifications include text font and size, bibliography title, line spacing and indents.

1. Open your Word document
2. Select the EndNote tab, click on Bibliography arrow
3. Click the Layout tab



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Creating an Independent Bibliography In EndNote

1. Highlight the required references
2. Click on *Edit > Copy Formatted*
3. Open a Word document and *Paste*

Using Footnotes with Endnote

1. Open the EndNote library
2. Select the reference you wish to cite in a footnote
3. Open Word, position the cursor where you wish to insert the footnote indicator
4. In Word select the Reference menu then insert Footnote. Go down to the new footnote, click where you want the citation to be inserted, from the Endnote toolbar select "Insert Selected Citation(s)".

Note: In Endnote ensure to select a referencing style that supports Footnotes

Exporting EndNote References from a Word Document

All Word documents linked to an EndNote library have a unique Endnote library called a Travelling Library attached to the document. Export the references from the document to an existing or new EndNote library. Use the travelling library to share references or recover references when the original EndNote library has been lost or destroyed.

1. Open the Word document
2. Click on *Export to EndNote > Export Travelling Library*.
3. At the prompt, open an existing or new EndNote library. Click *OK*

Hint:

- Do not un-format the word document, as you will need the original EndNote Library to reformat the document
- It is recommended that you export your references to a new EndNote library so you can review the references
- A travelling library does not contain notes, abstracts, images or captions

Removing Field Codes

Remove EndNote field codes from a Word document to enable the document to be opened on a computer that does not have the EndNote program. Some publishers require the removal of field codes prior to article submission.

In Word

1. Select the EndNote tab, click on *Convert Citations and Bibliography > Convert to Plain Text*
2. At the prompt, click *OK*
3. A new document will be created without EndNote coding, leaving the original with EndNote coding


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Sharing EndNote libraries

To work with colleagues:

- Send a compressed Endnote library via email (instructions page 2 of workbook). This will include the EndNote library and the .Data folder
- Use EndNote Online (EndNote Web) to share a library that can be edited by all users

Endnote Online (EndNote Web)

- Create an EndNote Online account
- Sync libraries from different computers (e.g. i-pad/home computer) using the cloud. Use the  sync button to create an exact references + groups match. The match is exact so deleted references will be deleted from all synced libraries. Groups need to be in alpha order. Sync to an empty library for first sync. Available using EndNote X7.1 or later.
- Share an EndNote Library with up to 15 total users. Sync the library with EndNote Online first then invite collaborators by sending invitation emails. Users must have an Endnote Online account. Users have unlimited storage for file attachments. Set up your library to share selected content with colleagues, giving *read only* or *read/write* access. Available for version X7.2 or later.

More information on sharing EndNote libraries and EndNote Online are included in the Library's EndNote guide (*Guides > Research > Endnote*)

Last updated: 10^h March 2017, Learning and Teaching Team