Introduction to EndNote workshop

EndNote is a bibliographic management / referencing software that allows you to create, organise and maintain a personal database of references called an EndNote Library.

Some of the things you can do are:

- Manually create references
- Export references from other databases into your library
- Attach files
- Organise your library with Groups
- Insert citations into documents and automatically generate a bibliography / reference list

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Install the software

Please have EndNote installed and working on your computer before you attend this workshop.

CQUUniversity has negotiated a site licence for EndNote, which permits staff and students of the University to use the software both at work and at home. This software is available for both Windows and Macintosh computers.

Go to the Installation tab of CQUUniversity’s EndNote LibGuide to get links and instruction for downloading and installing the software.

If you need help installing the software, contact TaSAC
- Call from a Video kiosk in any campus library
- Call from your phone: 1300 666 620
- Call from a campus phone: extension 59090
- Email your request to tasac@cqu.edu.au
- Submit a request via the online Self Service Portal

Get started

1. Open the Start menu and go to All Programs
2. Select EndNote. The first time you open EndNote, you will see the Getting Started with EndNote window:
   ![Getting Started with EndNote window]
   Once you have created a library you will no longer see this box when you log in. EndNote will automatically go to the last library that was opened on your computer.
3. Click the Create a new library graphic. The New Reference Library window will open.
4. Select the file location for your EndNote library. You can create a new EndNote folder if you wish. It’s best if this is a top level folder.
5. In the **File name** box, type a name for your library.

6. Click **Save**.

A New Library window will open.

Each version of EndNote looks slightly different, but they are all divided up into several areas or panes:

- The Toolbar at the top of the library
- Library of References
- A Groups pane on the left
- A Preview, Attachment, PDF & Reference (Quick Edit) pane.

These panes assist you in managing your library.
Manually create a record for a reference

An EndNote record has fields that are used for creating a reference such as Author, Year, Title, etc. There are also other fields that are for your research notes and other data. The fields you need use to create the reference will depend on the reference type. Consult the relevant referencing manual on the CQUinity Referencing Guides page to find out what you need to include in the reference.

Journal Article is the default Reference Type. Click on the arrow at the right of the Reference Type box to select a different reference type (e.g. Book, Conference Proceedings, Map, Web Page, etc.).

The new reference window:

1. Open EndNote
2. Click the New Reference icon to open a new blank record. The default Reference Type is Journal Article. Use this one for a print article. Change to Electronic Article for an article you found in a database so the reference will include the DOI or URL.
3. Click in the Author field and enter the author’s Surname, comma, then first name e.g. Type Hamnett, Hilary J
4. If there is more than one author hit enter after each name to add a new line for the next name. Enter the name in the same format, e.g. Korb, Ann-Sophie
5. Click in the **Year** field, or use the tab key to go down to it. Enter the year, e.g. 2017

6. Go to the **Title** field. In the Title field type the article name in sentence case, e.g. The Coffee Project revisited: Teaching research skills to forensic chemists.

7. Tab down to the **Journal** field and type the journal title exactly as it appears in the journal, e.g. Journal of Chemical Education. See [Replace your Journal Terms list](#) for more information.

8. In the **Volume** field, enter the volume number, e.g. 94

9. In the **Issue** field, enter the issue number, e.g. 4

10. In the **Pages** field, enter the numbers only, e.g. 445-450

11. Add the DOI or URL
   - If your referencing style requires the **URL**, go to the URL field and paste the article URL or journal home page URL there, e.g. [https://pubs-acs-org.ezproxy.cqu.edu.au/doi/abs/10.1021%2Facs.jchemed.6b00600](https://pubs-acs-org.ezproxy.cqu.edu.au/doi/abs/10.1021%2Facs.jchemed.6b00600)
   - If your referencing style requires the **DOI**, go to that field and add the number, e.g. 10.1021/acs.jchemed.6b00600

12. This is the end of the fields for referencing. Enter information in the other fields as desired, e.g. you could use the Label field to record where you searched and what your search terms were, or use the Access Date field to record the date you found the article.

13. Close the reference by clicking on the **X** button in the top right-hand corner of the New Reference window.

14. You will be prompted to save the changes. Click **Yes**.

15. The new reference will appear in the Reference panel of your library. Use the Preview tab to see how it will appear in your bibliography / reference list.
Example Electronic Article record in EndNote

<table>
<thead>
<tr>
<th>Author</th>
<th>Hamnett, Hilary J</th>
</tr>
</thead>
<tbody>
<tr>
<td>Korb, Ann-Sophie</td>
<td></td>
</tr>
<tr>
<td>Year</td>
<td>2017</td>
</tr>
<tr>
<td>Title</td>
<td>The coffee project revisited: Teaching research skills to forensic chemists</td>
</tr>
<tr>
<td>Journal</td>
<td>Journal of Chemical Education</td>
</tr>
<tr>
<td>Volume</td>
<td>94</td>
</tr>
<tr>
<td>Issue</td>
<td>4</td>
</tr>
<tr>
<td>Pages</td>
<td>445-450</td>
</tr>
<tr>
<td>DOI</td>
<td>10.1021/acsjchemed.6b00600</td>
</tr>
<tr>
<td>Label</td>
<td>Library Search: &quot;research skills&quot;</td>
</tr>
<tr>
<td>Keywords</td>
<td>Add the authors' keywords or your own here.</td>
</tr>
<tr>
<td>Abstract</td>
<td>Add the abstract here if you want to refer to it.</td>
</tr>
<tr>
<td>Notes</td>
<td>Add up to 8 pages of notes here.</td>
</tr>
<tr>
<td>Research Notes</td>
<td>Add up to 8 pages of notes here.</td>
</tr>
<tr>
<td>URL</td>
<td><a href="https://pubs.acs.org/doi/abs/10.1021%2Facs.jchemed.6b00600">https://pubs.acs.org/doi/abs/10.1021%2Facs.jchemed.6b00600</a></td>
</tr>
<tr>
<td>Author Address</td>
<td><a href="mailto:hilary.hamnett@glasgow.ac.uk">hilary.hamnett@glasgow.ac.uk</a></td>
</tr>
<tr>
<td>Access Date</td>
<td>11 October 2018</td>
</tr>
<tr>
<td>Name of Database</td>
<td>American Chemical Society Journals</td>
</tr>
</tbody>
</table>
It is important to follow the guidelines for data entry, consistency is the key.

**Tips for Entering Data**

1. If there is more than one author, each author must be entered on a separate line
2. Preferred method for entry of authors and editors is to enter Family Name, First Name
3. Corporate Authors must be entered with a comma at the end e.g. Queensland Health,
4. Enter the full journal title or consider downloading a Journals Term List for your subject area
5. Do not add punctuation to the end of the title and ensure there are no blank spaces after entering in details
6. Use Capitals within the reference, as you would like it to appear in your bibliography

**Direct export**

A number of databases allow you to export records for articles and other resources directly from the database into your EndNote library. It only takes the records, however, so you will still need to download the PDF files and attach it to the record yourself.

Some databases only allow you to export one record at a time. Others allow you to export batches of records. Usually, you tick a box beside the record in the search results list, then save or download the records. Instructions for different platforms / databases are listed below:

Please note: Due to the structure of certain database records, information may occasionally be imported into incorrect fields within your EndNote library. These need to be edited manually.

Instructions for a number of databases are linked from the Exporting references into EndNote, filters and connection files page of the EndNote guide. For the purposes of this session we are demonstrating EBSCOhost.

**Exporting using EBSCOhost:**

1. When your search results are displayed, click on the Add to folder icon to add a reference you wish to download to your folder.
2. After selecting references, click on the Folder icon at the top of the screen (or on right side of the page under Folder has items click on Go to: Folder View)

   This displays the references in your folder in a new window.
3. Select the items you want to export.
4. Click on the Export icon. A new window will open.
4. Check the radio button beside **Direct Export to EndNote, Procite, or Reference Manager**.

   ![Save citations to a file formatted for:]
   - Direct Export to EndNote, Procite, or Reference Manager
   - Generic bibliographic management software
   - Citations in BibTeX format
   - Citations in MARC21 format
   - Direct Export to RefWorks

5. Then click on the **Save** button.

6. EndNote will now open whichever library as last opened. The references are then downloaded into your library automatically. Those items which have been directly imported into EndNote will be displayed in a Group.

7. Check your references after import, to make sure that they have imported correctly.

**Known Problems with EBSCOhost databases:**

Some records (particularly older references) may require editing of the author field.

- **CAB Abstracts**: Some records have author affiliation information entered into the author field.

- **Current Abstracts**: All references are imported as Generic reference type and require editing.

- **Health Source**: Nursing/Academic Edition: All references are imported as Generic reference type and require editing.

- **Sport Discus**: Some references require editing.

If you have any difficulties downloading references from EBSCOhost databases, contact the Library via **tasac@cqu.edu.au**
Setting up to Export from Google Scholar:

2. Go to Settings

3. Under Bibliography Manager, tick Show links to import citations into, and select EndNote from the drop down list
4. Save Preferences

Now when you search in Google Scholar an Import to EndNote link will appear under each reference.

Enhancing the quality of life through wearable technology
To meet this set of growing challenges, healthcare professionals are trying to provide patient care more efficiently and, whenever possible, in the least expensive setting, throughout the continuum of care—be that an ICU (intensive care unit), a hospital general care unit, a ...
Attaching files

Manually attaching a File to a Reference

The PDF of a document will generally not be automatically imported with a reference. You need to attach the file yourself.

Only PDF files will display as attachments with the paperclip icon in EndNote, but a number of other formats can also be attached.

- PDF files, Word documents, PowerPoint presentations, spread-sheets, audio files, video files and others like this go into File attachment field.
- Photos, diagrams and tables go into the Figure attachment field. See How to create a figure record and attach an image file for instructions.

Method 1

1. Save a copy of the file to your computer.
2. Open your EndNote library
3. Open the reference you want to attach the file to.
4. Click on the paperclip icon for the Attach File function.
5. Navigate to the file you saved in the file selection window.
6. Highlight that file and click Open. A thumbnail will appear in the File Attachment field, e.g. a PDF icon for a PDF file.

Method 2

1. Right click on the File Attachment field.
2. Choose Attach File…
3. Click on Choose File to browse your files.
4. Highlight the file you need from your files and click Open. A thumbnail will appear in the File Attachment field.

Method 3

1. Save a copy of the file to your computer.
2. Open your EndNote library
3. Open the reference you want to attach the file to
4. Drag and drop the file into the File Attachment field.
Find full text
The Find Full Text function will only work with articles available from certain large online electronic journal collections. The EndNote software has to be individually coded for each of these databases, so not all articles that are available online will be retrieved by the Find Full Text function. Normally only journal articles can be retrieved in full text. If EndNote is able to find the PDF, it will download it and attach it to the reference as a File Attachment. The PDF will be stored in the DATA folder associated with your EndNote library.

Configure the Find Full Text settings in your EndNote library:

1. Open EndNote
2. Click on Edit on the top menu bar to open the drop down menu.
3. Select Preferences.
4. Click on Find Full Text on the left hand side of the Preferences window. You will see a range of tools that can be used to retrieve full text:
   - DOI (Digital Object Identifier) – all users should check this option.
   - PubMed Link Out – all users who import references from PubMed should check this option
   - OpenURL – This option will be useful for users whose library has implemented alink resolver such as serials solutions. Link resolvers are usually more successful if the EndNote records include and ISSN.
5. Tick the box labelled OpenURL.
6. Below this, replace the existing text in the OpenURL Path box with:
   https://cqu-primo.hosted.exlibrisgroup.com/openurl/61CQU/61CQU_SP
7. If you are working on a campus computer, skip to Step 9.
8. If you are working off campus, or using your own device, add the following URL to the box below Authenticate with: http://ezproxy.cqu.edu.au/login?url=
9. Click OK.

Begin using Find Full Text:
It is best to work with small batches of 5 to 10 references. If you search for too many at a time EndNote slows down and the Find Full Text function looks like it’s not working.

1. Highlight a small batch of the references in your library that you want EndNote to search for.
2. Click on the Find Full Text icon in the toolbar at the top of the library window.
3. If you are working off campus, you will be asked to authenticate with your CQUUniversity staff username / student number and password.
4. Click on Continue to begin the search.
5. Repeat steps 1 to 4 as needed for small batches of the remaining references you wish to search for the full text of.
A Find Full Text group set is located at the bottom of the Groups Pane (left-hand side of the library window). In this group set you can see auto-groups which allow you to monitor progress of the search.

If EndNote is unable to download the full text of the article, it may be able to find a URL link and insert it into the URL field of the reference. It may be possible to download the PDF using this link and attach it to the reference yourself.

**Using PDF handling preferences in EndNote to attach files**

You can set up PDF Handling preferences in Endnote so it will automatically import PDF files and create records for them. This function works best when there is a DOI (Digital Object Identifier) for the article.

If the article you want doesn't have a doi, EndNote will still import it, but you'll need to do a bit more work to get the record populated.

**Set up PDF handling preferences**

1. Go to the **EndNote folder** in your **Documents** and create a subfolder with a short name that makes sense to you when you see it. I've called mine **Articles found online**. Leave it empty for the moment.

2. Open **EndNote**.

3. Go to **Edit** in the toolbar and select **Preferences**.

4. In **Preferences**, select **PDF Handling**.
5. Select the PDF Auto Renaming Option that suits you. Whichever option you choose only renames the copies of the files that are attached to the EndNote record when they are imported. The original files in the Imported folder will retain their original names.

6. Tick the box for Enable automatic importing.

7. Click select folder and find the folder you created.

8. Click on it to add its file path to the box.

9. When you have finished, click Apply, then OK.

Use PDF handling
After you have created the folder and set your preferences, you can start to use this function.

1. Search articles in Library Search or the databases of your choice.

2. Download the PDF files you want and save them to the folder you created.

3. When you are next online with EndNote open, it should automatically start to import the articles. If the articles are not importing, close EndNote and re-open it to start the process.

4. EndNote creates an Imported folder and puts the articles into it as they are imported.

5. A list of these imported references will appear in Endnote. If there is a DOI, the details of the article will populate the fields and you’ll have a full reference with PDF attached.
6. Articles that don’t have a DOI will have a title that appears as the name of the PDF in pointy brackets, e.g. <Library-research-support.pdf>. For these, there is one more trick to try…

7. Select the same reference in the list on the main screen. Go to Reference in the tool bar and click on Find Reference Updates.

8. If EndNote can find the details, it will populate the reference as it did for the article with the DOI. If it can’t, you’ll have to add the details in manually.

9. Open the reference (double click on it). In the Reference window, click on Layout in the bottom right corner and tell it to open the PDF Panel on the right. This allows you to copy details across to the fields in the record for the article.

10. Copy the author and title information from the PDF to the reference. Save and close the reference.
Dealing with duplicate references

EndNote can cross check references of the same type and identify pairs with multiple matching fields, using Find Duplicates. There are defaults set for this function, but you can set your own preferences for dealing with duplicates.

Setting duplicate handling preferences

There are several fields available for comparison: Author, Year, Title, Secondary Title (=Journal Title), Volume, Issue, Pages, Section, Publisher, Place Published, Tertiary Title, Short Title, Subsidiary Author, Reference Type, Label. Choose the ones that best suit your own needs.

1. Open the Edit menu and select Preferences
2. Click Duplicates in the menu of the EndNote Preferences window.
3. In the Compare references based on the following fields box, tick the fields you want EndNote to compare. Untick the fields you don’t want to compare. The defaults are Author, Year, Title, and Reference Type.
4. Under Criteria, choose between Exact Match and Ignore spacing and punctuation.
5. Under Online Search Results, choose to automatically discard duplicates, or not. If you allow duplicates to be imported, you can compare the records later using the Find Duplicates option.
6. Click Apply to apply your choices.
7. Click OK to close the window.
Find Duplicates
Use this function to identify duplicate references in your library and deal with them. It will only compare pairs of references

1. Open EndNote.
2. Select the All References group so that EndNote will search you whole library for duplicates.
3. Open the References menu from the toolbar and select Find Duplicates. EndNote will scan your records.
4. If you have duplicate references, a Find Duplicates window will open. One set of duplicates will be displayed side by side for you to compare. The fields that are different will be highlighted. Choose what you want EndNote to do with these records.

You have 3 options:
- **Keep this record**: This keeps the chosen record and deletes the other one. If there is unique, useful information in the record you are not keeping, copy it and paste it into the record you are keeping first.
- **Skip**: This keeps both records and puts them in a temporary Duplicates group so that you can go back and look at them later. This is useful if you have 3 or more duplicate records for the same source.
- **Cancel**: This tells EndNote to delete the most recently added version of the record.

5. When you have decided on one set of duplicates, the next set will appear for you to review. Continue working through the duplicates one set at a time.

When you delete the unwanted duplicate records, they go into the Trash group. To remove them completely, right click on Trash in the Groups pane and select Empty Trash.
Please note: The Empty Trash function cannot be undone.
Working in the temporary Duplicates group.
If you have 3 or more duplicate records for a reference, but each has unique information in the additional fields, you can copy that information from one to the other before deleting.

1. Open each record for the reference and evaluate the data entered into the fields.

2. Use the record number to identify the most complete and accurate version. This is the one to keep.

3. Open each of the other duplicates in turn. Copy the unique information you wish to keep into a blank document.

4. Close each record as you finish with it.

5. Open the version you are keeping. Paste the unique information into the relevant fields.

6. Save the changes to the record.

7. Double check each record to make sure that you have all of the information you need.

8. Delete the unwanted duplicates.

9. Repeat this for the remaining sets of duplicate records in the Duplicates group.
Using Groups and Group Sets to manage your library

You can use groups and group sets to organise your references by categories of your choosing. Groups can be added, deleted and changed without affecting the All References area of your library. References can belong to multiple groups. All references belong to the All References group as well as whichever groups you assign them to. Group Sets act like a subject heading to place your groups under.

Create a Group:
From the Menu bar:
1. Click on **Groups** in the top menu bar
2. Select **Create Group** from the drop-down menu.
3. Type a name for the group / group set in the box that opens in the **Groups Pane** on the left

From the Group Pane on the left:
1. Right click on **My Groups**
2. Select **Create Group** from the menu
3. Type a name for the group in the box that opens in the **Groups Pane** on the left

Create a Group Set:
From the Menu bar:
1. Click on **Groups** in the top menu bar
2. Select **Create Group Set** from the drop-down menu.
3. Type a name for the group / group set in the box that opens in the **Groups Pane** on the left
From the Group Pane on the left:
1. Right click on My Groups
2. Select Create Group Set from the menu.
3. Type a name for the group/group set in the box that opens in the Groups Pane on the left

Add a new Group to a Group Set:
1. Click on the name of the Group Set in the Groups Pane.
2. Follow the steps for creating a group. The new Group box will appear under the Group Set name.

Add existing groups to a group set:
Highlight/select a Group, then drag and drop it into the Group Set.

It is now also possible to combine groups through the Create From Groups option

Add references to a Group
1. Highlight/select the reference/s in the library window
2. Drag and drop selected references into the group
OR
1. Highlight/select the reference/s in the library window
2. Click on Add References To from the Groups drop-down menu
3. Select the name of the group from the list available
OR
1. Highlight/select the reference/s in the library window
2. Right-click on the reference and go to Add References to
3. Select the group from the sub-menu
Smart Groups/Create from Groups

Smart Groups are groups that have an inbuilt search query. EndNote automatically checks your new references against this query, and adds them to the smart group if they match.

1. Right click on My Groups.
2. Select Create Smart Group from the menu.
3. Type a name into the Smart Group Name box.
4. Use the search boxes to create the search query that EndNote uses to automatically populate this group.
5. Click Create.
6. You will see that this new group has appeared in the Groups pane, and EndNote has added all of your references that meet the search criteria. Click on the Smart Group Name to open the group and view the references added to
Back up your library

You will spend hours developing and maintaining your EndNote library. This is where you keep all of your materials for your research so it is vital that you regularly back your library up.

1. Open your EndNote Library.
2. Go to File option on the toolbar.
3. Select Compressed Library (.enlx).
4. Select the formatting options that suit you in the Compressed Library window.

![](image)

5. Click Next and save in a location of your choosing.

**Always use the Compressed Library option.** When EndNote creates the library, it will also create a .DATA folder which contains various files connected with the library (PDF’s, Groups). When you compress the library, EndNote will include the .DATA folder. If you do not save the .DATA folder with you library .enl file you will not be able to open your pdf attachments or see your groups.

It is recommended that you keep a number of back-up copies of your library and document. One copy of each should be located at a separate location, e.g. another drive.

**CAUTION: Never open or use your library in cloud storage, or on a storage device such as a USB.** It will corrupt your library. Always download the library and save it to your device. Open the copy you saved to your device and work in that library. When you finish, save a compressed copy of the library and upload that to storage.
Find and select Output Styles
In EndNote referencing styles are called Output styles. There are a large number of styles already included in EndNote. You can choose one of these, or add new styles, e.g. harvard-cqu_2017.

Choose an existing output style for your EndNote library
1. The default setting in the Bibliographic Output Styles box is Select another style. Click on the arrow beside this to open the menu. As you add styles this menu will get longer.
2. If the style you need is listed, select if from this menu. Your references will now display in this style in the preview pane.
3. If the style you need is not listed, click Select Another Style. This opens a window with the full range of options.
4. Browse the list or use the quick search to locate the style you want.
5. Highlight this style and click Choose. The new style will appear in the Output styles box in the toolbar and your references will display in this style in the preview pane.

Choose an existing output style in Word
1. Go to the EndNote toolbar in Word
2. Click the down arrow beside the Style box to bring up a list of styles
3. If the style you need is listed, select if from this menu. Your citations and bibliography will update to this style.
4. If the style you need is not listed, click Select Another Style. This opens a window with the full range of options.
5. Browse the list to locate the style you want.
6. Highlight this style and click OK. The new style will appear in the Output styles box in the toolbar and your citations and bibliography will update to this style.
Add a new output style to EndNote
1. Find the style you need to download.
   - For the harvard_cqu and AGLC styles, go to the Styles tab of this guide.
   - Additional styles are available from the EndNote website.
2. Download the style
3. Save it to the Styles folder your computer.
4. After you have done this, follow the instructions to for choosing an existing style in EndNote and Word to set this new style as the output style for your library and document.

Find additional styles
Additional styles are available from EndNote’s Output Styles page. You can get to this page from your EndNote Library.

1. Open the Edit menu in the toolbar.
2. Go to Output styles to open the submenu.
3. Click Open Style Manager.
4. Click the Get More on the Web button underneath the list of styles in the EndNote Styles window.
5. Search for the style you need by name.
Sorting and searching your library

To sort by Author, Year or Title, click on any column heading. To place in the reverse order click on the column a second time.

To arrange columns in order of your choice, simply drag and drop the header where you want it. To delete or add a column to your library, right click in the header bar to view options and tick or un-tick to suit your preference.

To quickly find a reference use the Quick Search box on the toolbar. EndNote will search for a string of letters in relation to the search term.

EndNote also provides a more sophisticated search function. Click on the Show Search Panel to display the Search Pane at the top of the library.

Searching an EndNote Library

To sort library, click on any column heading. Use the drag and drop functionality, re-arrange the order of the columns. Right click on a column header to open preferences to remove or add a column.
Create an independent reference list

There are times when it is useful to have a list of references that isn’t linked to your writing. For example, you may want to send a list of references to your supervisor to see if you’re on the right track with your research.

You can create an independent reference list without using Cite While You Write. It is possible to select and copy formatted citations directly from your EndNote library into a blank document. The resulting list will not contain EndNote formatting, so there will be no direct links to your EndNote library.

Using EndNote version X7 or later:

1. Open your EndNote library.
2. Select the referencing style you need in the Styles box in the toolbar.
3. Highlight the references you wish to include
4. Open the References menu in the tool bar and select Show selected references. This hides the references you don’t need for your list.
5. Use Copy formatted to copy the references formatted in the chosen referencing style:
   - Right click on the highlighted references and select Copy Formatted from the menu.
   - OR Go to Edit in the toolbar and select Copy Formatted from that menu.
7. Paste the list into the document. A formatted reference list will appear.
8. Save a copy of your list to your files.
Using earlier versions of EndNote:
1. Open your EndNote library.
2. Select the referencing style you need in the Styles box in the toolbar.
3. Highlight the references you wish to include
4. Click on the **Export** button
5. Save the exported references as a **Rich Text Format** file.

![Export file name dialog box](image)

Save it in a suitable location and give it a meaningful name

6. View the file by opening the word document you have just saved.
Cite While You Write (CWYW)

The CWYW function allows Word users to insert references into a document as it is typed. As you enter citations, the bibliography/reference list will appear at the bottom of the document. You can also edit citations to add page numbers or use acronyms in place of long organisation names, and delete citations.

Insert an in-text citation – Option 1

1. Insert your cursor where you want the citation to appear.
2. Go to the EndNote toolbar in Word
   ![EndNote toolbar](image1)
3. Click on Insert Citation and choose Insert Citation from the drop down menu.
4. The Find & Insert My References window should open. Search for the author's surname, or some words from the title, or some keywords in the search box at the top left. Click Find.
5. Select the reference from the list of possible references that appear below the search box.
   ![Find & Insert My References](image2)
6. Click the arrow beside Insert to bring up your options for formatting your citation
   - If you want the citation to appear as (Author/s, Year), choose Insert
   - If you want the citation to appear as Author/s (Year), choose either Insert & Display as: Author (Year), or Insert & Exclude Author. If you exclude the author names, you will need to type them yourself.
Insert an in-text citation – Option 2

1. Insert your cursor where you want the citation to appear.

2. Go to the EndNote toolbar in Word

   ![EndNote toolbar]

   - Click Go to EndNote. Your EndNote library will open.
   - Locate and highlight the relevant reference/s in your EndNote library
   - Click on the Insert Citation Icon in the toolbar of your EndNote library.

   NOTE: The citation will appear in your document. If you click on it, you will see that it is highlighted in grey. This indicates that it has EndNote formatting and is directly linked to your EndNote library.

Edit a citation to add a page number

There are 2 ways to do this. You can use Edit & Manage Citation(s) in the Endnote toolbar in Word, or right click on the in-text citation.

1. Click on the citation to highlight it.

2. Open the Edit & Manage citations window. You have 2 options:
   i. Go to the EndNote toolbar
   ii. Click on Edit & Manage Citations.
   OR
   i. Right click on the citation
   ii. Choose Edit Citation(s) from the pop-up menu
   iii. Click More …

3. Make sure the correct reference is highlighted in the Edit & Manage Citations window.

4. Go to the Edit Citation section in the lower half of the window.

5. The page number goes after the year in the citation, so it's added as a suffix. You need to add all of the necessary punctuation, including spaces yourself. EndNote will not automatically add them in. Type a comma space p. space and the number, e.g., p. 55, into the Suffix field.
6. Click **OK** to close the Edit & Manage Citations window. Back in your document, the citation will now include the page number.

7. **Save** the changes to your document.

**Edit a citation to display the acronym in place of the organisation’s full name:**
Corporate authors such as companies, government departments and research institutes often have acronyms, e.g. the Australian National Data Service uses the acronym ANDS. The full name needs to appear in your reference list, but you can use the acronym for the in-text citations. The instructions below tell you how to edit the in-text citation so the acronym will appear in the citation, but the full name will still remain in your reference list.

**To change the company name to its acronym:**

1. Click on a corporate author citation in your document, e.g. (Australian National Data Service, 2013)

2. Go to **Edit & Manage Citation(s)** in the EndNote tool bar in Word. This opens the **Edit & Manage Citation(s)** window.
3. Select **Exclude Author** from the Formatting menu.

4. Type the acronym into the **Prefix** field. Add a comma, or other punctuation as required by the referencing style. Lastly add a space. EndNote will not add a space between the acronym and the year if you do not.

5. Click **OK** to close the Edit Citation(s) dialog window, and the in-text citation will now appear in your document with the acronym and year e.g. (ANDS, 2013)

**Remove citations**

**Never** delete citations by using the delete or backspace keys. It can corrupt your document. You need to remove the formatting that links the citation in your document with the matching record in your EndNote library.

To safely delete a citation:

1. Click on the citation in your document to highlight it.
2. Go to the EndNote toolbar
3. Click on **Edit & Manage Citations**
4. Make sure the correct reference is highlighted in the Edit & Manage Citations window.
5. Open the drop down menu for Edit Reference
6. Select **Remove citation**. This removes the in-text citation, the reference in the bibliography, and the associated EndNote formatting.
7. Click **OK** to close the Edit & Manage Citations window.
8. **Save** the changes to your document.

**Correcting Details in an in-text citation or reference list:**

You may sometimes notice errors in your in-text citations or bibliography / reference list in your Word document. This is usually a result of errors in the EndNote record. For example, the author names may not be displaying correctly because you have 2 or more author names on the same line of the EndNote record.

**To correct these errors:**

1. Open your EndNote library.
2. Locate the reference and open it.
3. Check all of the fields associated with the reference list, e.g. author, year, titles …. Make any necessary corrections.
4. Save and close the reference.
5. Go back to your Word document.
6. Click **Update Citations and Bibliography** in the EndNote toolbar. EndNote will reformat the references and the bibliography will be corrected.

We recommend that you always keep a backup version of your Word document as well as your Library.

**To open a reference for editing**

Highlight the reference. Edit the fields of the record in the Reference tab of the Reference panel.

OR

Alternatively, double click on the reference to open the record. This method has more editing options such as, bolding, italics and changing case.
Combining the chapters of your thesis using Convert to Unformatted Citations

It is a good idea to work on chapters of a longer work separately. However, there comes a time when they need to be combined. Using the Convert to Unformatted Citations will allow you to do this safely. As an extra precaution, work with copies of the original chapters.

1. Start by making a copy of each chapter. If you create a new folder for the copies it will help you to avoid confusing them with the originals.

2. Rename chapter 1 with the file name for your completed thesis. This will become your master document as the following chapters are added to it.

3. Open this new master document in Word.

4. Go to the EndNote toolbar in Word and click on Convert Citations and Bibliography.

5. Select Convert to Unformatted Citations. This will remove the bibliography at the end of each chapter and citations will appear in curly brackets, e.g. {Grey, 2016 #23}.

6. Repeat these steps for the remaining copies of each chapter.

7. Go back to the new master document that used to be chapter 1. Scroll to the end of the chapter and go to the top of next blank page.

8. Find the second unformatted chapter and select all the text of the chapter (Ctrl A / Command A).

9. Copy the text and paste it at on the new page after the end of chapter 1.

10. Close the unformatted copy of chapter 2.

11. In your master document, go to the EndNote menu in Word select the Update Citations and Bibliography command. Your bibliography will reappear and citations will look as they usually do. It's a good way to make sure that the chapters have been combined successfully.

12. Save your changes.

13. Go to the EndNote toolbar in Word and click on Convert Citations and Bibliography.

14. Select Convert to Unformatted Citations ready to add the next chapter.

15. Scroll to the end of the chapter and go to the top of next blank page.

16. Find the third unformatted chapter and select all of the text of that chapter.

17. Copy the text and paste it on the new page after the end of chapter 2.

18. Close the unformatted copy of chapter 3.

19. Update Citations and Bibliography in your master document and Save your changes.

20. Continue repeating this process from Convert to Unformatted Citations, through adding the unformatted text of the next chapter, to Update Citations and Bibliography, until the whole thesis is in one document.

21. Save this document. It is now your master copy of your complete thesis. EndNote will have reformatted all the citations in your document and created a single bibliography at the end of the thesis.
! Make at least one back-up copy of your full thesis and store it in a separate location to the original.

! Never store your document with unformatted citations. Always update citations and bibliography to reinstate the EndNote coding before you save and close your document at the end of an editing session. If you can't complete the compilation of your thesis in one session, update citations and bibliography of your combined document, and save before closing. When you come back to this, convert the combined document to unformatted citations and continue combing and above.

Removing Field Codes using Convert to Plain Text

When you use Cite While You Write (CWYW) in Word, the document is formatted with field codes that allow EndNote to format your in-text citations and create your reference list. The Convert to Plain Text command removes this EndNote formatting from your document so that it is no longer actively linked to your EndNote library. This step is necessary before submitting a copy of your work for marking or review or publishing.

1. Open your formatted document.
2. Go to the EndNote tab in Word and select Convert Citations and Bibliography to bring up the menu.
3. Select Convert to Plain Text. (In earlier versions, use the Remove Field Codes command.) A copy of the document, without field codes, appears in a new document window.
4. You will see a warning message, explaining that this will preserve your original document (with EndNote field codes) and create a new, unsaved document (without EndNote field codes). Click OK to continue.
5. Save this plain text document with a different name to distinguish it from the original document.

IMPORTANT: Convert to Plain Text cannot be undone, so it is important to keep the original document if you decide to make changes, such as including or removing citations using EndNote.
How do I get help with EndNote?

Self help

- EndNote’s help section is very useful. Click the Help button on the toolbar of your EndNote library to access this.
- CQUUniversity’s [EndNote LibGuide](#) aims to show you the basic skills required to get started using the EndNote. It does not cover everything you will ever need to know

For help installing EndNote, or fixing software issues contact TaSAC:

- Call from a Video kiosk in any campus library
- Call from your phone: 1300 666 620
- Call from a campus phone: extension 59090
- Email your request to [tasac@cqu.edu.au](mailto:tasac@cqu.edu.au)
- Submit a request via the [online Self Service Portal](#)

For help using EndNote

- Contact TaSAC as above. Email queries are assigned to the Librarians Online Team (LOT). Calls are redirected to LOT if a librarian is available. If not a job is created and assigned to LOT so a librarian can respond when available.

OR

- Book a virtual face to face [Ask a Librarian](#) session at a time that suits you. Please note that all sessions are scheduled in QLD time. You will need to allow for that if you are in a different time zone.