

Top tips for using EndNote

The following tips will help you get the most out EndNote and avoid potential problems.

- Always use EndNote to collect and manage your citations. It is not possible to automatically convert a reference list in a Word document to records in an EndNote library.
- When installing the EndNote software, select **Custom Installation** to install the complete set of Endnote style, filter, and connection files.
- Use the latest version of EndNote, and regularly check for updates to EndNote by clicking **Help ► EndNote Program Updates**. However, if you are completing your research in the current year, you may want to continue using your current version.
- EndNote can be customised according to your requirements (e.g. reference types, styles, and for screen display **Edit ► Preferences**).
- Wherever possible, create one library and use **Groups** (in the EndNote toolbar) to organise the references within the library. Insertion of citations into a Word document from more than one EndNote library can potentially lead to corruption of the document.
- Export a **Complete Record** from a database whenever possible, in order to import all available information about the reference into EndNote.
- Be familiar with the bibliographic style you are using. Always check the references you import into your EndNote library for accuracy and consistency with the style by checking the **Preview** window. You may need to manually edit the contents of some fields.
- Use the **Research Notes** field in a record to add your comments to that record.
- Before you start or resume writing, check your EndNote library for, and remove any duplicate references. This will avoid possible confusion, and corruption of your document. From the EndNote toolbar, click **References ► Find Duplicates**.

- To add or remove information from in-text citations, or to delete an in-text citation from the document, always use **Edit and Manage Citations**.
- Before cutting and pasting text within a document that contains formatted citations, click **Convert to Unformatted Citations** (in the Convert Citations and Bibliography menu). This will help avoid corruption of the document that can otherwise result. To reformat the document, click **Update Citations and Bibliography**.
- You can share your library with others if you create an **EndNote Online** version of it. Refer to the EndNote Online tabs in the EndNote library guide:
<http://guides.lib.monash.edu/endnote>
- To work with your library from more than one computer (e.g. between home and campus office) use **EndNote Online** to synchronise the library between the computers.
- Regularly **back up** your EndNote library, Word documents, and other (e.g. customised style) files to a secure storage device. Create a **compressed file** of your library (via the **File** menu), which will automatically include the library's data file. Ideally, save it to Google Drive on your Monash account. Otherwise, avoid using Dropbox or similar cloud-based storage systems.
- If you have questions about using EndNote, get in touch with your local Monash University Library contact: <http://monash.edu/library/skills/contacts/>

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