

Introduction to EndNote X7

These notes have been prepared to assist participants in EndNote classes run by Monash University Library. Examples have been developed using Windows 7 with Microsoft Office 2010 as the word processor. Some features may differ when using other operating systems or word processors, particularly Macs.

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Introduction

What is EndNote?

EndNote is a program for electronically importing, storing, and organising references and for creating citations and bibliographies from these references.

References are stored in EndNote **libraries** and can be added manually or by importing records from databases using EndNote **filters** or by directly exporting them. A **connection file** enables EndNote to directly search and retrieve records from online databases. Bibliographic **styles** determine how EndNote references are formatted and presented in a Microsoft Word document. The following file types are used by EndNote:

EndNote Libraries	.enl	EndNote Connection Files	.enz	Preferences File	.enp
EndNote Styles	.ens	Data Folder	.data	Terms List	.txt
EndNote Filters	.enf	Microsoft Word Template	.dot	Compressed Library	.enlx

Obtaining the software

Important: EndNote is commercial software and the license restricts access to Monash staff and students only.

EndNote can be downloaded from the **Obtain EndNote** tab at <http://guides.lib.monash.edu/endnote>.

Important: After installation, check for any post-release updates and patches at [updates endnote.com](#) or in your EndNote program click *Help > EndNote Program Updates*.

Check for updates

Thomson Reuters occasionally releases updates to EndNote to fix reported bugs. It is a good idea to check that you have the latest update installed.

1. In EndNote, click Help ► EndNote Program Updates...
2. Download, unzip, and run the update patch if one exists.

Alternatively, you can download the update file from: <http://endnote.com/downloads/available-updates>

Where to get help

From the Library

1. Visit the **EndNote** library guide at: <http://guides.lib.monash.edu/endnote>
2. Contact the library via **ask.monash** at: my.monash.edu.au/askmonash

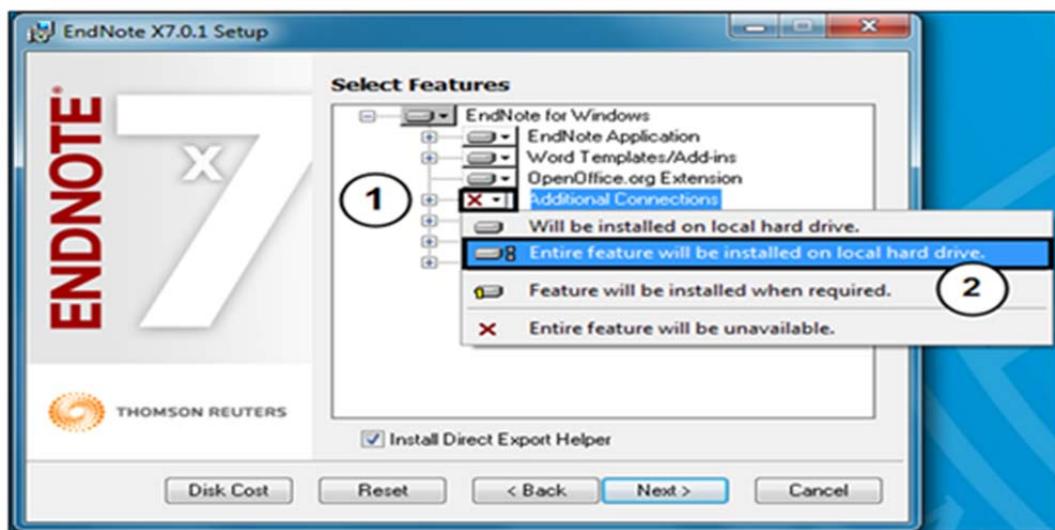
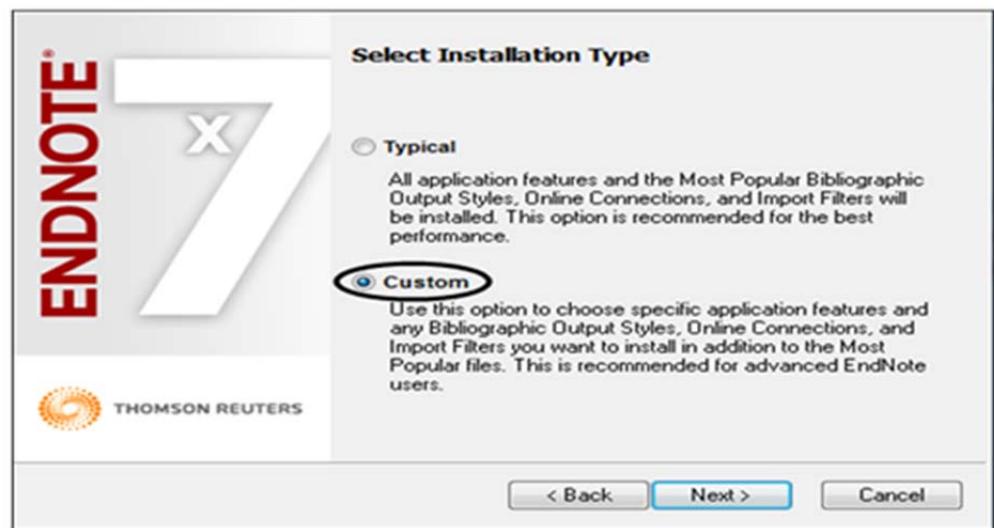
From endnote.com

3. The **Help** Menu in EndNote contains a range of indexed and searchable topics
4. The EndNote Online User Guide at: <http://endnote.com/if/online-user-manual/x7>
5. The EndNote FAQs page at: endnote.com/support/faqs
6. The EndNote Training videos at: <http://endnote.com/training>
7. The EndNote **Forums** for technical support at:
community.thomsonreuters.com/t5/EndNote/ct-p/endnote

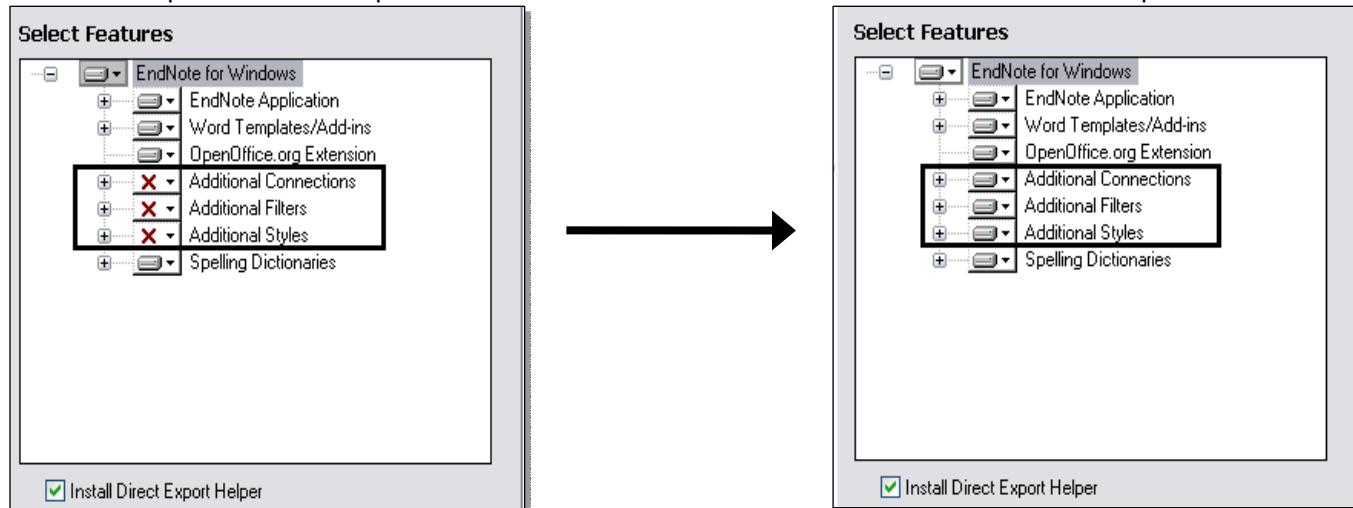
Perform a custom installation

By default, EndNote X7 installs only the commonly used filters, output styles and connection files. To install all available files, chose **Custom** instead of **Typical** during the installation process.

Select the Custom option during installation. Then choose Entire feature will be installed on local hard drive from the pull-down menu of Additional Filters. Repeat the previous step for Additional Styles and Additional Connections.



Click **Next** to proceed and complete the installation. You can leave the rest of the installation options as default.



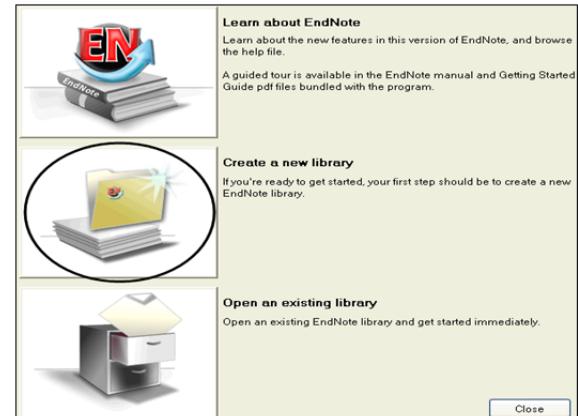
Create a new library

EndNote libraries

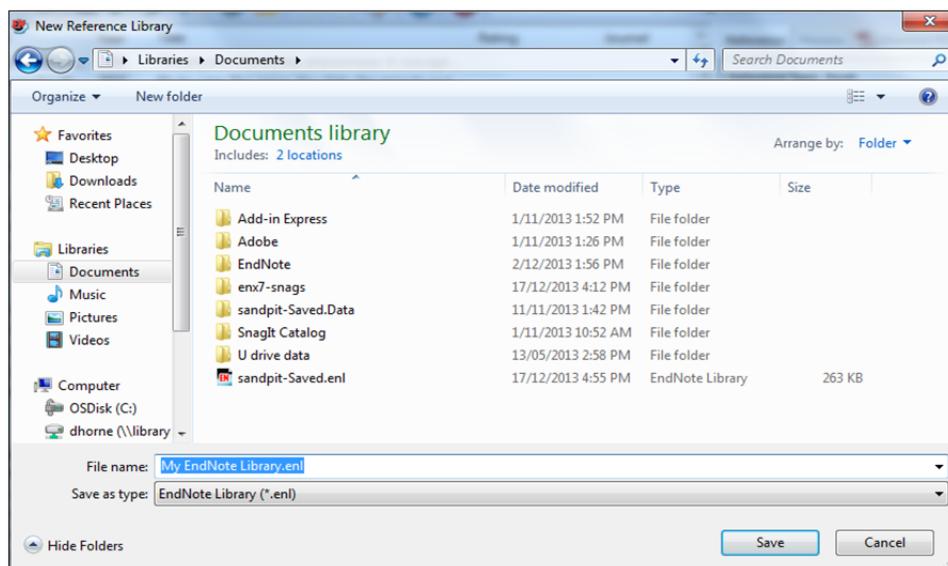
An **EndNote library** refers to the collection of references you create, store and manage. There is no limit to the number of libraries you can create or the number of references you can store in a library. However, it is *strongly recommended* you keep all your references in one primary library.

Starting EndNote for the first time

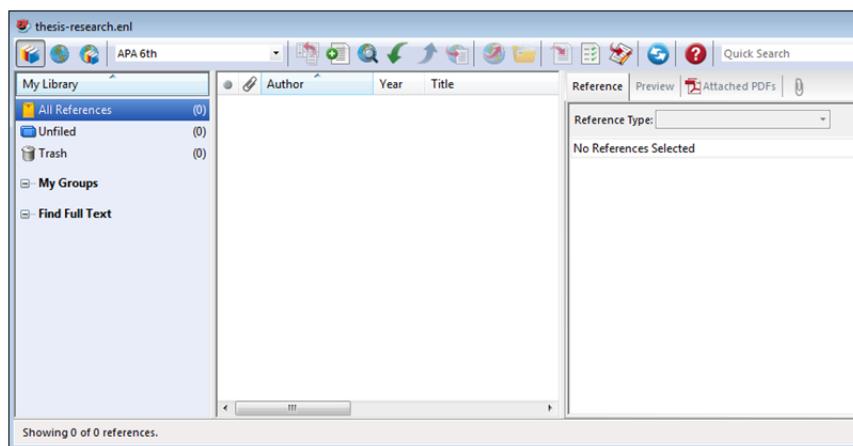
1. Click Start  ► All Programs ► EndNote (folder) ► EndNote (program)
2. The first time you start EndNote, the Getting Started window appears. Choose the second option, **Create a new library**.



3. The New Reference Library dialog box will appear. Navigate to a desired file location and enter a file name for your new library. Click **Save** to finish.



4. The new library you created will open automatically, with its file name in the top left corner.



❖ Hint:

- You can create a desktop shortcut icon by dragging the EndNote Program link onto your Desktop.
- If the Getting Started window does not appear, you can create a new library by clicking File ► New
- The default save location is **Documents**

Add references to your library manually

There are various ways of adding references to your library. You can manually enter reference information to create a record or you can transfer electronic records in a number of ways from various electronic databases.

****Correct data entry is essential for EndNote to work well.**

Create a new reference

1. Click **References ► New Reference** (or use the **New reference** icon). Your main library window will change to a new empty reference template.
2. Choose the type of reference you are creating by selecting from the **Reference Type** drop-down menu.



Reference Type: Journal Article

Author
Copeland, Charles E.
Stahlfeld, Kurt

Year
2012

Title
Two tall poppies and the discovery of *Helicobacter pylori*

Journal
Journal of the American College of Surgeons

Volume
214

Issue
2

Pages
237-241

Start Page

Epub Date

Date
February

Type of Article

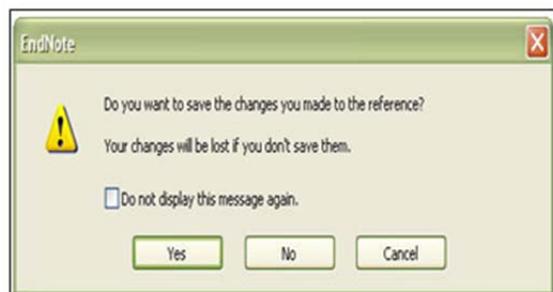
Short Title

Alternate Journal
J Am Coll Surg

TCCN



3. Start typing reference details into corresponding fields by clicking on each heading or by using the **Tab** key.
4. Click the close button on the **New Reference** window.
5. Click **Yes** to save, **No** to discard, or **Cancel** to remain in the editing window.



❖ Hint:

- Some text you enter will appear in red if this is the first time you have entered it. If there are existing records in your library EndNote will try to provide auto-complete suggestions as you type. Simply keep typing to over-write them.
- Put each author on a new line and use the format of "*Surname, First Name*". Be sure to include the comma.
- If the author is an organization, include a comma at the end of the name (e.g. "Monash University,"). If your corporate author name includes a comma in the name itself, use two commas in place of the first comma (e.g. "Department of Agriculture,, Fisheries and Forestry")
- Generally avoid using any punctuation, labels, or text styles that are normally a part of a bibliographic style. EndNote will format the style automatically. However, include discipline specific styles (e.g. italics for species names) within the title field. EndNote will not alter any text within that title field.

Journal title abbreviations

EndNote uses “**term lists**” to correctly identify full and the abbreviated title names. EndNote software includes lists of journal names and abbreviations, including medical, bioscience and chemistry lists. Not all subject areas have EndNote terms lists. The medical term list includes most journals indexed by **Index Medicus**, as used in the databases **Ovid Medline** and **PubMed**.

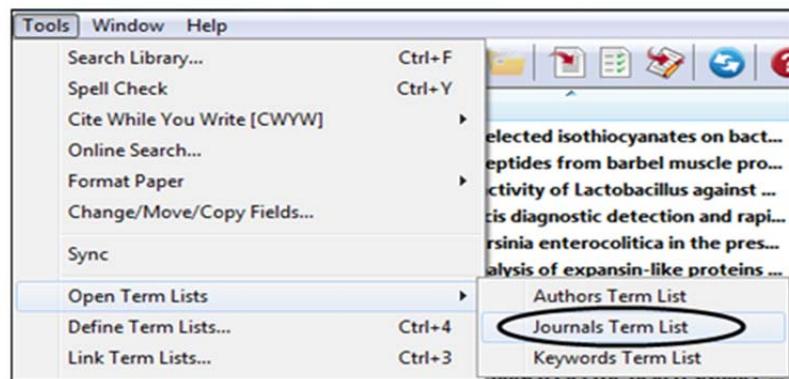
If a link to a term list is required, then each library you create should be linked to the term list *prior* to adding any records. For more information, see the **Term Lists** and **Bibliographic Styles** sections of the EndNote manual.

An EndNote library can be linked to more than one term list, however lists must be linked one at a time and conflicts may occur if more than one list is used. It may be safer to use just one list, choosing the one with greatest coverage in your topic area.

Linking to a journals terms list

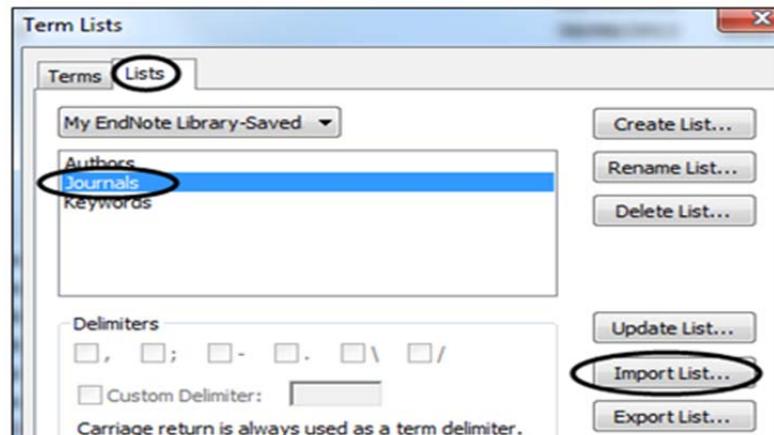
1. Click Tools ► Open Term Lists and select Journals Term List

♦Hint: If you have previously entered any records into your library it is possible you may already have some terms listed. To ensure the lists work properly, select the Terms tab and delete anything that already shows there. This will not delete the records in your EndNote library. It merely changes the terms list.



2. Select the **Lists** tab and highlight **Journals**.

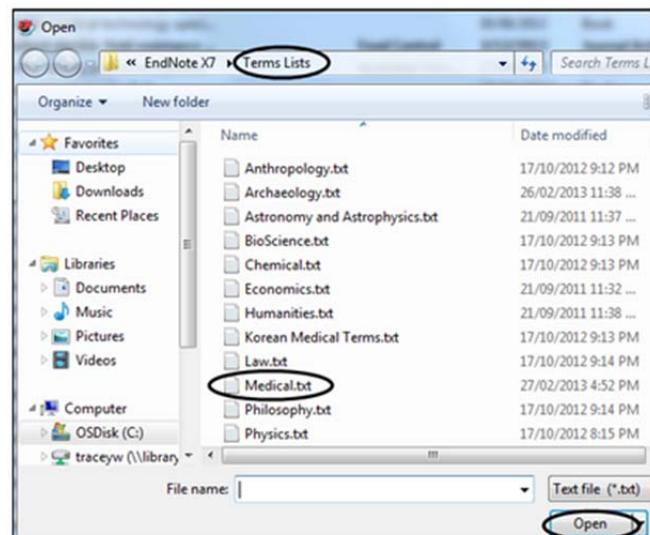
3. Click **Import List**. This will take you to a windows screen to allow you to locate the stored lists. Look under *C:\Program Files\EndNote X7\Terms Lists* or under *C:\Program Files (x86)\EndNote X7\Terms Lists* and highlight a terms list relevant to your subject area, e.g. Medical. For Macs, click **Finder** ► **Applications** ► **Endnote** ► **Terms** or For Macs, see *Tips for Mac users* at <http://guides.lib.monash.edu/endnote>



4. Click **Open**. You will note data downloading into your library. When completed you can click **OK** and close the Terms List window. You will now have the chosen terms list linked to your library for future reference.

5. If you now go back to Tools ► Open Term Lists ► Journals you can see all the titles you now have data for. Click the **Terms** tab to view your imported terms list. Each journal name in the new list should include:

- Full journal name
- Abbreviation 1: Abbreviated title with full stops
- Abbreviation 2: Abbreviated title without full stops (if Medical Terms List selected)

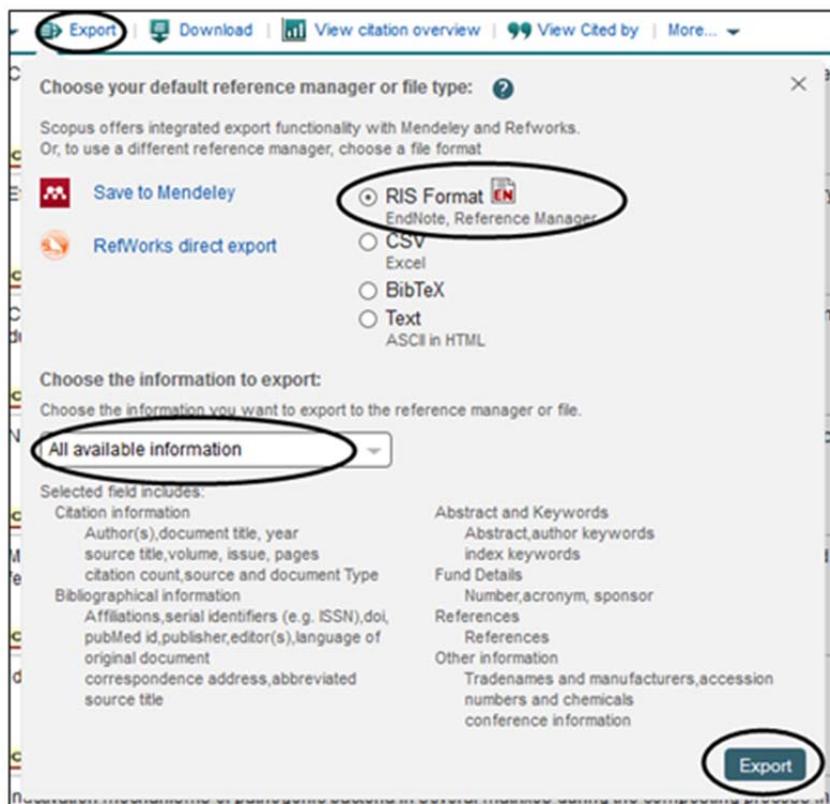
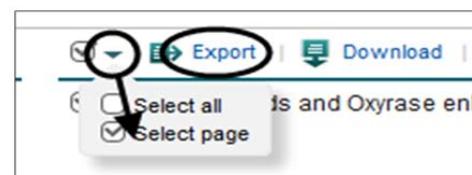


Add references to your library electronically

References can often be downloaded directly into an EndNote library using a database's **Direct Export** feature. This is the most commonly used method and is supported by many databases.

Direct export of references from a database - Scopus

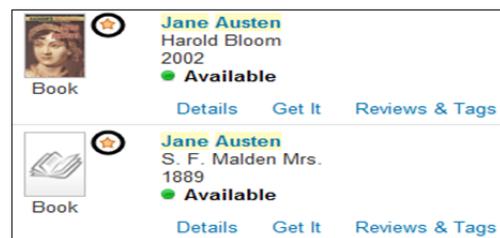
1. Open a web browser and go to <http://guides.lib.monash.edu/subject-databases>
2. Select **Scopus** from the **Popular** list of databases.
3. Perform a brief search, e.g. type **"pathogenic bacteria"** in **Article Title, Abstract, Keywords** and click the search button.
4. At the top of the results list tick the box next to **Page** to select all results on this page.
5. Next, click the **Export** button at the top of your results to expand the options box. Select **RIS format (EndNote, Reference Manager)** and for **Choose the information to export**, select **All available information** from the drop-down menu. Click the **Export** button.
When the **scopus.ris** file appears, click **Open**.
(Alternatively, open it from your Windows 7 **Downloads** folder.)
EndNote will open, and display the imported records.
6. Open various references to verify the content and check whether any information is missing. You may need to edit some records, e.g. there may be a "?" instead of an umlaut over a letter, incorrect capitalisation, or data in the wrong fields, or you may need to italicise an organism or species name in an article title.



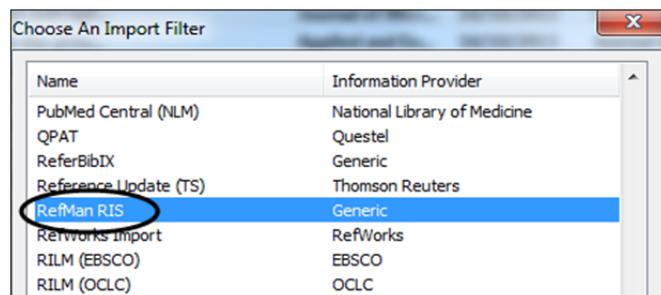
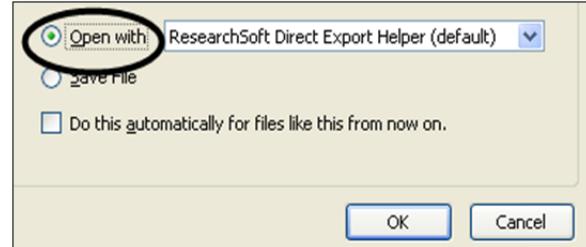
❖ Hint: Please refer to the EndNote Library guide for instructions on a range of databases. guides.lib.monash.edu/endnote

Direct export of references using Monash Library Search

1. Open a web browser and go to monash.edu/library
2. In the Search box, perform a brief search, e.g. type “**jane austen**” including the quotation marks.
3. Select the items you want by clicking the star beside each record – it will change to yellow.
4. To Export to EndNote click on **e-Shelf** in the top right corner and review the list you have created.
5. Tick any items you want to Export to your Library. Using the **Select how to save** pull down option, select **Push to Endnote Desktop (RIS)**, then click **Go**.



6. A **Push to RIS (Import to Citation Manager)** window should appear. Its appearance may differ according to the web browser you are using. Click **OK** to accept the default settings.
7. If using Windows 7 the *Primo_RIS_Export.ris* file will appear in the **Downloads** folder. Double click on this twice and Endnote will attempt to put these in your open Endnote Library. The **Choose an Import Filter** window will appear. Select the **Refman.RIS** import filter as shown. The records will import into the Library.
8. For earlier versions of Windows, open with the Direct Export Helper. For Macs, see *Tips for Mac users* at <http://guides.lib.monash.edu/endnote>
9. Alternatively, if a **File Download** window displays, click **Open**.
10. The records appear in the library. Double click on a reference to view the content and check for errors or omissions in the data. You may need to correct the Reference Type or edit some record content e.g. a record may contain “?” instead of an umlaut over a letter, incorrect capitalisation, data in the wrong fields, or you may need to italicise an organism or species name in an article title.



Individual Library records can also be Directly Exported into EndNote.

11. Using Search, find the individual record for the item you want and display the **Details** view.
12. Using the **Send to** pull-down menu choose the **Endnote Desktop (RIS)** option, then follow 5 - 7 above.

Import using filters

References can also be saved and then imported into an EndNote library using a specific Import Filter. Use this method when:

- direct export is either not available or extensive post-load editing is required, e.g. **Cochrane Library, SciFinder Web** or databases from **OCLC**
- you do not have immediate access to your EndNote library

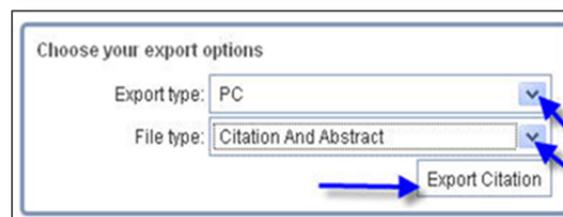
If a text file is to be imported, it must be saved in a specified format so that EndNote can recognize each separate field in the reference, e.g. in **Ovid** the correct export format is **Reprint/Medlars**. If no format is specified in the database you are using, save the citations as a **.txt** file.

Importing using Filter Files – Cochrane Library

1. Use the Cochrane Library link from <http://guides.lib.monash.edu/databases> and perform a brief search, e.g. type **avian influenza** and click **Go**.
2. Refine the results to **Trials** and click **Export all**.

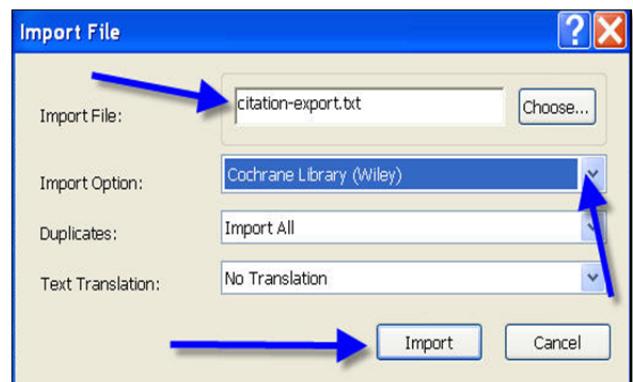
The screenshot shows the Cochrane Library search results for 'avian influenza'. On the left, the search bar contains 'avian influenza' and the 'GO' button is highlighted. On the right, the results list shows 'All Results (51)' and a category for 'Trials (44)' which is circled in blue. Below the results, there are two checked items in a list, and at the bottom right, there are buttons for 'Select all', 'Export all' (which is circled in blue), and 'Export selected'.

3. Choose your export options
4. Save the file to a convenient location as a text document and remember the filename.
5. From EndNote, select **File ▶ Import ▶ File**



6. When the **Import File** box appears, choose the file you saved in step 4.
7. Find the matching **Import Option**. If it does not already show in your favourites, select **Other Filters** and locate the **Cochrane Library** option.
8. Leave the other fields on the default settings and click **Import**

The Cochrane Library references should have been imported into your EndNote library from the saved file. Double click a reference to view the content and correct the fields if necessary. Close the reference after viewing.



Connection files and online search

A connection file contains all the information necessary to connect to a remote database, search that database, and import references into EndNote. They are often necessary for EndNote to interact with non-Monash library catalogues.

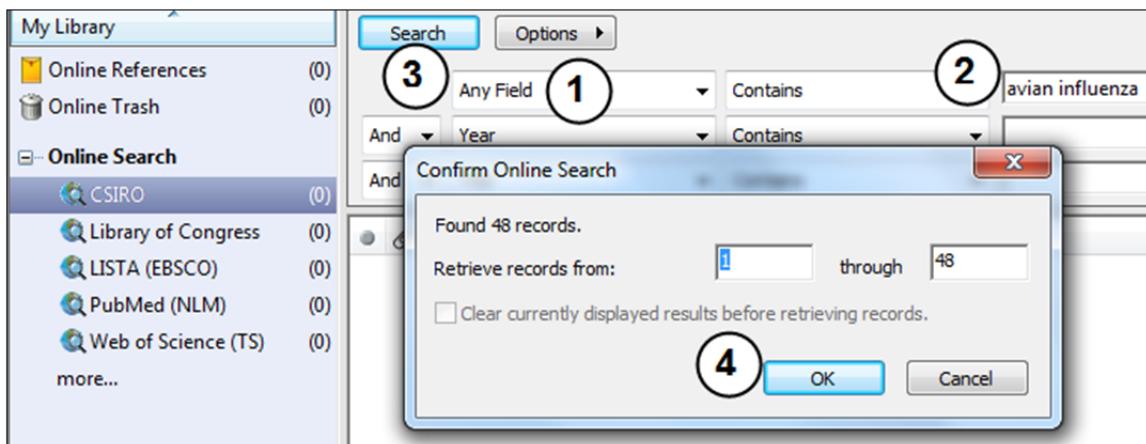
Connection file searching uses a simple internal EndNote interface and does not offer the level of search functionality possible within a standard database interface. It is therefore not recommended for general database searching, but may be helpful in some circumstances, particularly for locating a record for a known reference.

Use Online Search for a library catalogue - CSIRO

1. In EndNote click **Tools ► Online Search**. From the list, highlight **CSIRO** and click **Choose**.



2. Click the **Online Search Mode** icon. This will put any references you find into a temporary library to allow you to review which ones you want to keep.
3. Set the search parameter to **Any field** and enter search terms e.g. **avian influenza**. Click **Search**. (Steps 1-3 in the image below)



4. A dialogue box displays the number of references matching the search terms. Click **OK** (Step 4 in the image above) to retrieve the references and display them in the temporary library.
5. Highlight the references you want to retain, click **References ► Copy References To** and select your EndNote library.



6. Click the **Local Library Mode** icon to return to your library.
7. The chosen references are in the **Copied References** section in the left hand panel. Double click a reference to view the content and correct the fields if necessary. Close the reference after viewing.

Working with references within EndNote

Selecting references

- To select a *single reference*, just **click** on it **once**.
- To select *all references*, click **Edit ▶ Select All**.
- To select *multiple references*, **Ctrl + Click** to toggle individual record selection on or off without affecting other references.
- To select *a continuous range or block of references*, **click once** on the record at one end of the range, then **Shift + Click once** on the record at the other end of the range.

Editing references

To open records for editing (e.g. correcting a typing mistake or adding research notes) just double-click on the individual reference in the list of references.

Deleting references

To delete one or more references, select the reference(s) then use the **Delete** key.

Sorting your EndNote library

To quickly sort records within your library click once on the header of one of the display columns to sort by that column. Click a second time to reverse the sort order.

More detailed sort options are available via **Tools ▶ Sort Library...**

Searching within your EndNote library

Type your word or phrase into the **Quick Search** box and press the **Enter** key on your keyboard (or click the magnifying glass icon).



The Search Panel enables more detailed searches. To activate it, click **Show Search Panel**.

Ratings

The first field in a record is labelled **Rating**. To apply a rating (1 - 5 stars) to a reference click the number of dots in the Rating field that corresponds to the number of stars you want to award it.

In this way you can easily find key references within your library.

Mark as read/unread

In a list of references the grey dots in the far left column can be used to keep track of which references you have read, or are yet to read. After reading a particular reference, click the record's grey dot, which will become a hollow circle, a reminder that you have read the reference.

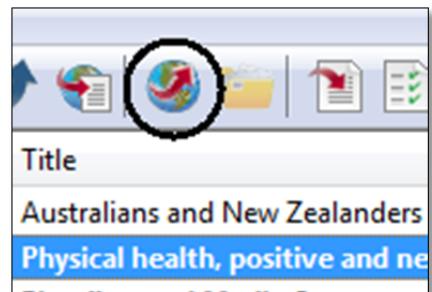
Layout options

The **Layout** button in the bottom right corner of the window provides various options for changing the display of the Groups and Reference panels.

Web links in references

When you transfer references from a database, each record may include a link back to the reference in the database. You can also manually add a web address to the URL field in a reference (this is mandatory for web pages and other web documents).

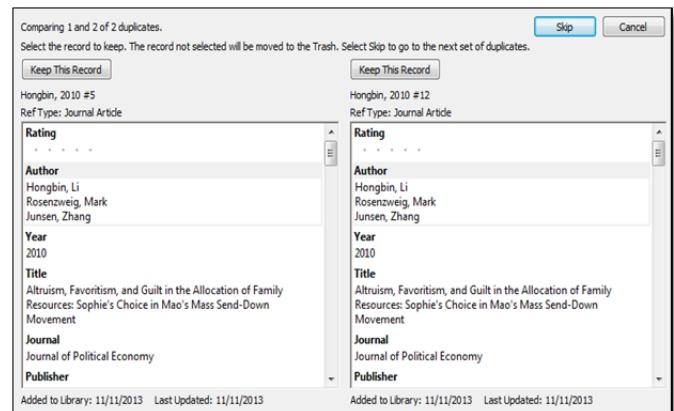
When a record contains a web address in the URL field, EndNote can open that link in your default web browser. Click on the reference, and then click the **Open Link** icon.



Dealing with duplicate records in your EndNote library

Find and compare duplicates

1. Click References ► Find Duplicates
2. EndNote will present you two references at a time to compare. Any fields which are different in the two records will be highlighted. You can scroll each reference to compare fields. Scrolling of both references will be synchronised for easier comparison.
3. Decide which to keep and click the **Keep This Record** button - the other reference will be deleted.
4. If you have three or more duplicates for a reference, you will only be presented with two references at a time to compare (e.g. you have duplicates 1, 2, and 3. You are presented with duplicates 1 and 2, you decide to keep 1, you will then be presented with duplicates 1 and 3)



Delete multiple duplicates

If you have a lot of duplicates, you can delete them all at once.

In the previous step, press the **Cancel** button. Click on the **Duplicate References** folder in EndNote - you should see all but one of each reference are highlighted.

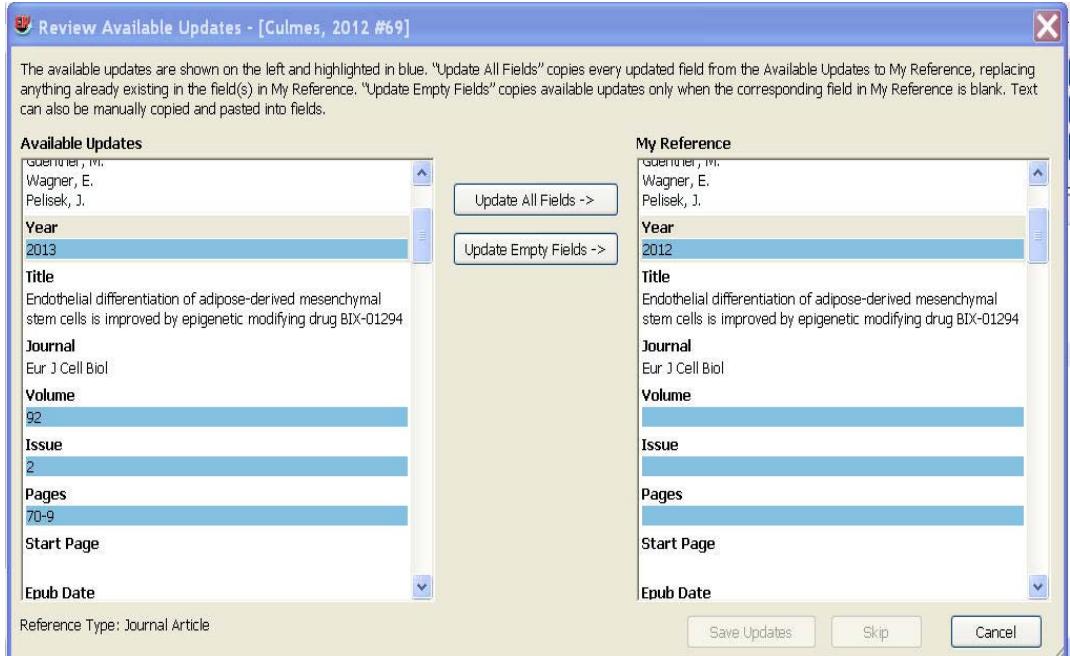
Click References ► Move References to Trash. If your trash builds up with deleted references, click References ► Empty Trash

❖ **Hint:** Not all fields are compared when selecting records to highlight e.g. you may be deleting the only record with a URL if the URL field is not being compared. EndNote default settings compare the same reference type with matching Author, Year, and Title fields. The settings can be changed – refer to EndNote help under Duplicate References.

Update References

EndNote can check for updates to your references from databases such as Web of Science. You can only check one article at a time.

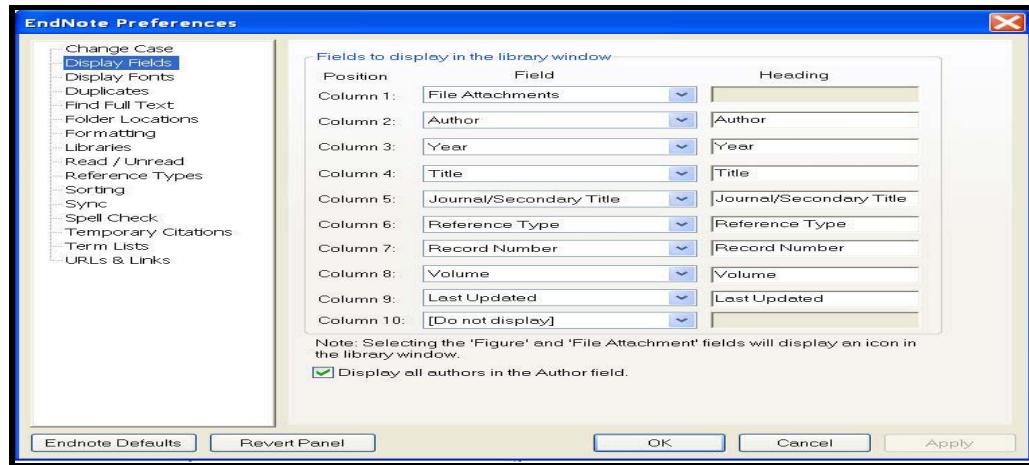
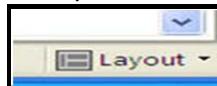
1. Select the article in your EndNote Library, then click References ► Find Reference Updates...
2. If any updates are found, changed fields will be highlighted, and scrolling will be synchronised in order to compare fields.
3. You can choose to **Update Empty Fields** in your existing record, or **Update All Fields**.



Layout Options

The **Layout** button in the bottom right corner of the EndNote Library window provides various options for changing the display of the Groups and Reference panels.

The **Edit ► Preferences ► Display Fields** command will offer a window for changing the layout and view of the Library reference window.



Working with full-text PDFs in EndNote

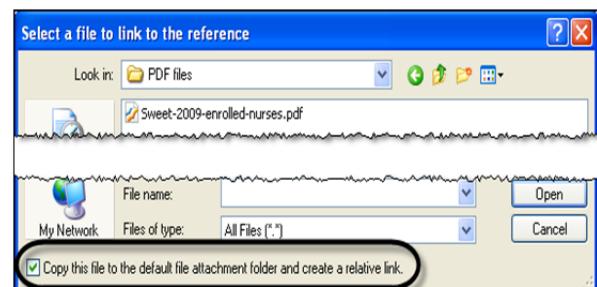
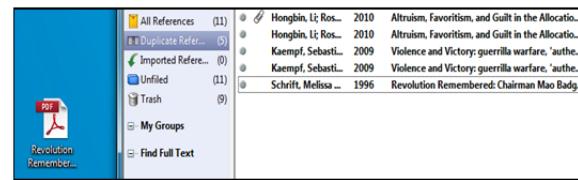
Full-text PDFs are not automatically included when exporting references into EndNote from a database. You will have to add the full-text PDF file manually, as described below.

Obtain your PDF

Download or save your PDF file to a location where you can find it easily. This will be a temporary location, so somewhere like the Desktop is fine.

Drag the file icon onto the appropriate reference

1. Arrange your windows so you can see both EndNote and the downloaded PDF file.
2. Drag the PDF onto the relevant record in the EndNote reference list.
3. A paper clip symbol next to the reference list title indicates that a file is attached to that record.
4. The PDF Viewer tab will show the filename of the PDF you have attached.
5. You can now delete the original downloaded file - EndNote has created a copy of the PDF file within the associated *.Data* folder of your EndNote library.
6. Alternatively, select the relevant record, then click **References ► File Attachments ► Attach File....** If you use this method, when choosing the downloaded PDF file, leave the option *Copy this file to the default file attachment folder and create a relative link* selected.

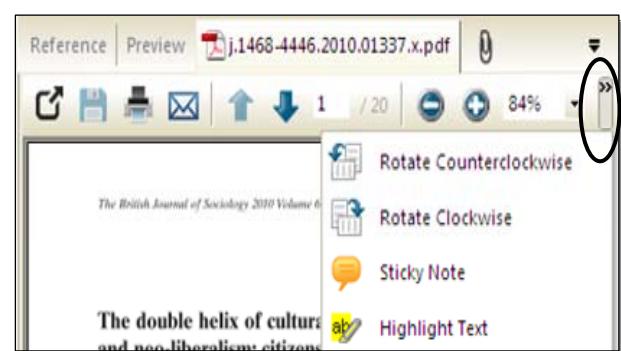


Viewing the full-text document

Now that you have attached the PDF file, to view the full-text document from EndNote select the appropriate reference and click the **Open File** icon. The document should open in your current PDF viewer (usually Acrobat Reader).

You can also read the PDF in the preview & quick edit area next to the list of items in your library. This area also gives you some basic tools for adding highlighting and sticky notes to the full-text PDF.

To highlight text in the PDF, drag to select the text you wish to highlight, then click the **Highlight Text** tool. To add a sticky note, drag to select the text you wish to annotate, then click the **Sticky Note** tool. Double-click the inserted icon to edit or read the sticky note.



Generating references from PDFs

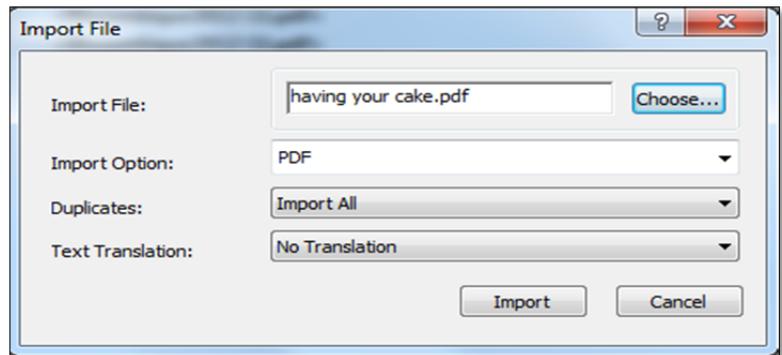
When an article in PDF format includes a DOI (Digital Object Identifier), now included in many journal articles, EndNote can use the DOI to obtain the bibliographic details and automatically create a reference.

Creating a reference from a single PDF file

1. Click File ► Import ► File.
2. Click **Choose** to select your PDF file, and ensure the **Import Option** is PDF (it is at the very top of the list of alternatives).
3. Click **Import**.

If the process is successful, a complete reference will be added to your library, with the PDF attached.

If not successful, a very brief reference with the PDF filename as the title is created, with the PDF attached.



Importing multiple PDFs

If all your PDFs are in a single folder, you can import multiple PDFs.

1. Click File ► Import ► Folder.
2. Click **Choose** to select the folder containing the PDF files, and click **Import**.

Successfully processed PDFs will result in complete references in your library, each with the appropriate PDF attached. Unsuccessfully processed files will produce very brief references with the PDF filename as the title and the PDF attached.

Check the record

The import process does not always work, and when it does sometimes the resulting records are not completely correct. As is the case when importing records from databases, after importing PDFs always check that the information in the new record is complete and in the correct fields.

PDF copyright and licensing issues

To ensure you comply with copyright law and database license requirements:

- always adhere to copyright limits of 'fair dealing' when uploading pdfs to your Endnote library. (www.copyright.monash.edu/research/fair-dealing.html)
- if you share your library with others, share just the references; do not include the full text attachments
- when you leave Monash University you must delete all full text licenced content from your EndNote Library
- do not use the 'Find Full Text' feature in Endnote to systematically download batches of articles from Monash databases

Groups in EndNote

It is highly recommended that you use a single library for all your references. Within the library, Groups provide an easy way of organising related references (e.g. according to themes, or in relation to individual papers or chapters that you are creating).

Important:

- Note that groups are not like folders. If you drag a reference into one or more groups, it does not remove it from All References.
- An individual reference can be added to as many groups as necessary.
- Editing the reference in All References will also change it in any groups, and editing a reference in a group will also change it in All References and any other groups.

Creating and using groups

You can create a group in two ways:

- From the **Groups** menu, select **Create Group**. A text box appears in the left of the screen, under **My Groups**. Enter a name for the group and press **Enter**.
- Select one or more references. Click **Groups ▶ Add References To ▶ Create Custom Group**. Enter a name for the group in the text box and press **Enter**.

Adding references to an existing group

Select the references to add to a group. Click **Groups ▶ Add References To**, then select the group.

Removing references from a group

- Select the reference(s) to be deleted from within the group.
- Click **Groups ▶ Remove References from Group**. This will not remove the reference(s) from the **All References** group.

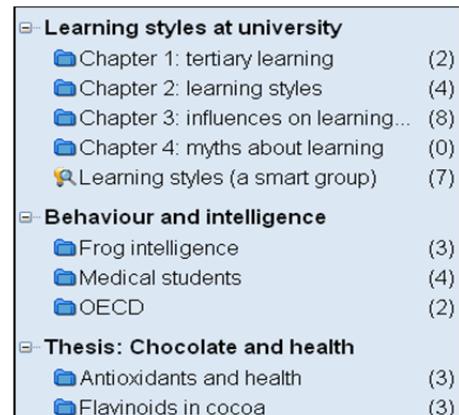
Deleting a group

To delete a group first select it, then click **Groups ▶ Delete Group**. As deletion cannot be undone, a warning message appears. However, the references will remain in All References (the main library).

Smart groups and group sets

From the Groups menu you can also:

- create Smart Groups, which automatically file references according to your preset criteria.
- arrange groups in Group Sets, as shown in the image to the right, in which a group set (e.g. Behaviour and intelligence) is like a drawer of a filing cabinet, and the groups beneath (e.g. Frog intelligence) are the files in that drawer.
- See EndNote's help file for more information.



Working with EndNote references in Word

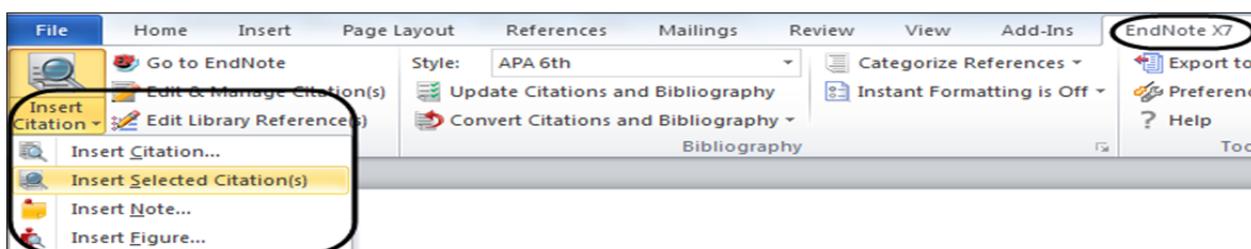
Adding in-text citations starting from the EndNote library

In EndNote, highlight the required reference by clicking on it once.

- Change back to Word by clicking the Word tab in the Windows taskbar at the bottom of the screen. Alternatively, click the **Return to Word Processor** icon . Click to place the cursor in the document where the reference is to be inserted.

❖ Hint: When you need to cite a number of references at the same place in a document, select the required records using **Ctrl + Click** or **Shift + Click**

- Select the EndNote tab in the Word "ribbon".



- Click **Insert Citation ▶ Insert Selected Citation(s)**.

- The in-text citation appears in the Word document and the corresponding entry in the bibliography is added automatically.

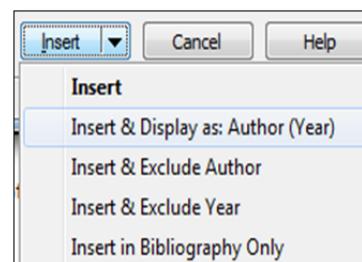
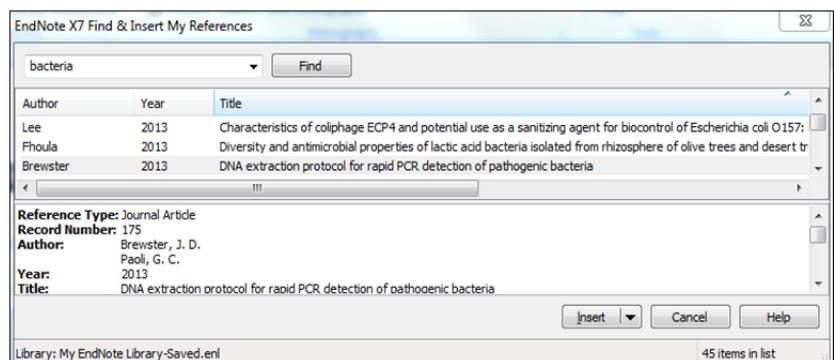
Although communication with the great apes has been attempted using a simple keyboard. Less work has been done communicating with other mammals (Rossi and Ades 2008).
More recent work has been done by Ord (2010).

Ord, T. J., J. A. Stamps, et al. (2010). "Adaptation and plasticity of animal communication in fluctuating environments." *Evolution* 64(11): 3134-3148.
Rossi, A. P. and C. Ades (2008). "A dog at the keyboard: Using arbitrary signs to communicate requests." *Animal Cognition* 11(2): 329-338.

❖ **Hint:** Alternatively, you can use **Alt+2** or the **Insert Citation** icon to insert the citation directly into the active Word document (wherever the cursor is located).

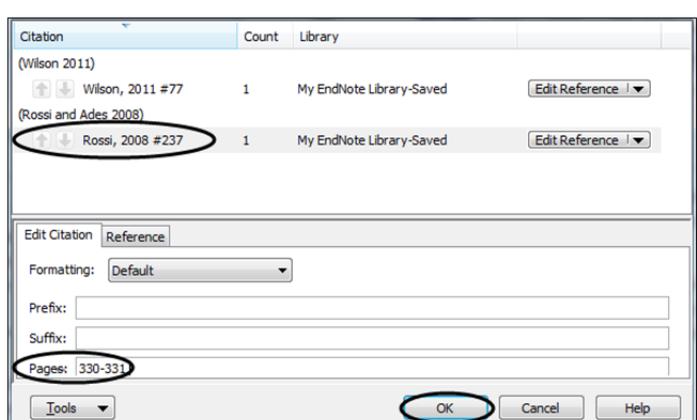
Adding in-text citations starting from the Word document

- In your Word document, place the cursor where the reference is to be inserted. Select the **EndNote** tab.
- In the Citations group, click the magnifying glass image on the top half of the **Insert Citation** button,
 a search dialog box will open.
- Type in your search term(s), and press **Enter**, or click **Find**.
- A list of matching records will appear. Highlight the reference to be inserted.
- Click **Insert**. The in-text citation will appear in the document and the reference list at the end of the document will be updated automatically.
- You can also add the citation as Author (Year) e.g. "Rossi (2008) commented..." Repeat steps 1-4 above, but instead of clicking **Insert**, click the **small black arrow** on the right of the **Insert** button. Click **Insert & Display as: Author (Year)** from the drop-down menu that appears.



Adding page numbers to an in-text citation

- Page numbers may be required in a citation when referencing a direct quotation or to provide easier access to the cited text.
- Click on the relevant citation. Its background turns grey to show it is selected.
- Click the **EndNote** tab ► **Edit & Manage Citation(s)**. Make sure the **Edit Citation** dialog box is selected so you can see the **Pages** field.
- Enter the page number(s) in the **Pages** field, and click **OK**.



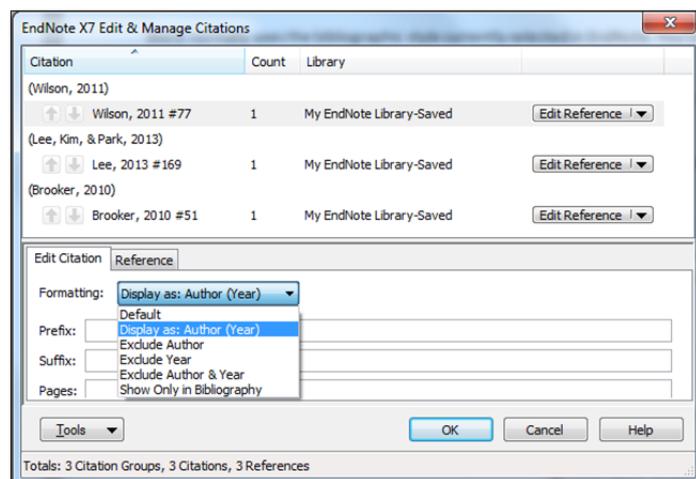
❖ **Hint:** Only some styles are set to display page numbers. For other styles, the **Suffix** field can be used for adding page numbers to a citation.

- Changing an existing citation to date-only

6. Sometimes you may have inserted the standard in-text citation (author and date), but wish to change the style of the sentence to refer directly to the author(s) in the text.
7. Insert the citation as usual, and then click once on the inserted citation to select it.
8. Click the **EndNote** tab, and then click **Edit & Manage Citation(s)**.
9. In the **Edit Citation** dialog box, select the **Formatting** drop down menu, **Display as: Author (Year)**, then click **OK**.

Your document will display as “*Rossi (2008) commented on ...*” rather than the default format “*(Rossi 2008) commented on...*”.

The bibliography entry is unaffected.



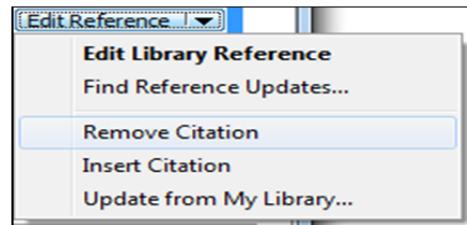
Deleting an in-text citation

Sometimes you want to remove an existing citation e.g. the wrong citation was accidentally inserted, or it was incorrectly placed. Do not simply select and delete the citation - EndNote inserts hidden formatting characters, and you may not delete all of them cleanly, resulting in corruption of the document.

Important: Do not simply alter a citation by directly typing in it, or by pressing **Delete** to remove it from the document. This can result in corruption of the document, and any such changes may be lost if you reformat the document.

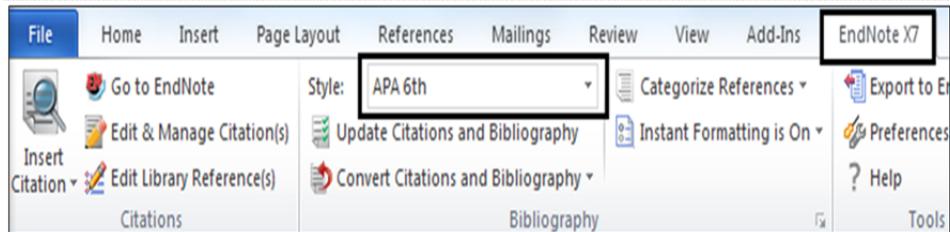
1. Click on the relevant citation to select it.
2. Select the **EndNote** tab, and then click **Edit & Manage Citation(s)**.
3. The **Edit & Manage Citation(s)** box displays. Ensure the correct citation is highlighted. Click the arrow beside the **Edit Reference** button, choose **Remove Citation**, and then click **OK**.

If this is the only time the citation was used, it will also be removed from the bibliography.



Changing the selected style

Word normally uses the bibliographic style currently selected in EndNote. You can easily change this in Word to any other style you have selected as a "favourite" in EndNote.



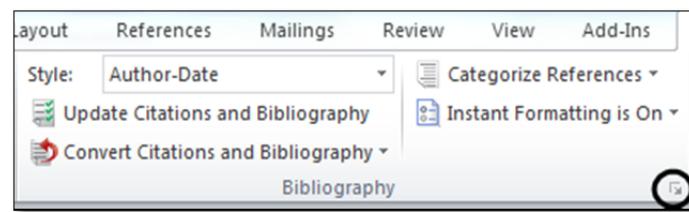
Select the **EndNote** tab and choose the required style from the **Style** drop-down list. The document will change to the newly selected style automatically.

If the style you need is not displaying in the drop-down list, choose **Select Another Style...** to select from the entire list of available styles.

Changing other bibliography options

You can change other reference list/bibliography options, such as including a heading, indenting, and line spacing between references.

Select the **EndNote** tab and click the button in the lower right of the Bibliography group to open the **Format Bibliography** dialog box, and then click **Layout**.



Changing the case in the field data from the Reference window

Change the case of field data for all references currently "showing" in the Library window by using the **Tools ▶ Change/Move/Copy Fields ▶ Change case**. Options include Sentence case, lowercase, UPPERCASE, Every Word, and tOGGLE cASE.

Merging EndNote libraries

Copying references between libraries

1. Select the references that you want to copy and select Edit ► Copy (Ctrl + C).
2. Open the library to which you want to add the references and select Edit ► Paste (Ctrl + V).
3. You can also use a simple drag-and-drop operation between two open libraries to complete the same process.

Importing EndNote libraries

To import one EndNote library into another EndNote library:

1. Open the library into which you want to import the references.
2. Click **File ▶ Import**.
3. Click **Choose File** to locate and open the library you want to import. Select the file and click **Open**.
4. From the **Import Options** list, select **EndNote Library**.
5. Select an option from the **Duplicates** list:
 - **Import All:** Imports the references, including duplicates.
 - **Discard Duplicates:** Imports the references, except duplicates.
 - **Import into Duplicates Library:** Duplicate references are imported into a library called *File-Dupl.enl*, where "File" is the name of the library into which you are importing.
6. Set the **Text Translation** option to **No Translation**.
7. Click **Import** to import the file.

Important:

Any time you add references to a library, the newly added references are assigned new record numbers in the order that they are added to the library. This means that a reference that was #23 in a smaller library, could become #600 in a larger library. As a result, you cannot use the larger, merged library to format papers that have citations with the older record numbers without major intervention.

Sharing your document

Unformat citations

Unformatting reverts formatted citations to temporary citations. For example a formatted citation that appears as: **(Rossi 2007)** in text will present as **{Rossi, 2007 #74}** after unformatting. To unformat your citations:

1. In Word, select the EndNote X7 tab then click **Convert Citations and Bibliography** button.
2. In the pull-down menu select **Convert to Unformatted Citations**. (The document can now be shared between different versions of Microsoft Word or word processing packages. *This method requires both the sender and the recipient of the Word document to have access to the relevant EndNote library in order for the unformatting and reformatting to be completed properly.)
3. To reformat a document in Word, click the **Update Citations and Bibliography** button on the EndNote X7 tab.

❖**Hint:** Unformatted citations require that you have the corresponding EndNote library open in order to format reference. If you are collaborating with others and wish to share citations unformatted, you will need to also share the EndNote library you have used for the Word document.

Your traveling library

If you are collaborating with colleagues who also use **the same version of Word and EndNote** as you, the field codes held in the **Traveling Library** allow authors to exchange and work on the document without needing to have a copy of each other's libraries. This is possible because the necessary reference information to create the citations and the bibliography is contained in the Traveling Library inherent in the document.

Search for **Travelling Library** in the Endnote User Guide for more detail about sharing files, field codes and the Travelling Library.

Finalising your documents

Convert to plain text

It is possible to remove the dynamic connection between a Word document and its EndNote library. As a result, a stand-alone document that is not tied to EndNote will be created. This is recommended when submitting a journal article or thesis to a publisher or printer.

To convert a document to plain text:

1. Save any desired changes to the original document.
2. In Word, select the EndNote X7 tab then click **Convert Citations and Bibliography**. In the pull-down menu select **Convert to Plain Text**. A warning message will appear. Click **OK** to proceed.
3. The new unlinked document will open in a new window. Save this document with a new name. Include the phrase “unlinked” in the name to readily identify it from the original, linked document.

Important:

After converting to plain text you will NOT be able to reformat the document using EndNote. Make sure you have a copy saved that will still link to the EndNote library.

Backing up EndNote libraries

Create a compressed library

EndNote includes a feature which allows you to put the library (or nominated references) and associated folders into one single file, optionally with file attachments.

1. Click File ► Compressed Library (.enlx).
2. Choose if you want to include file attachments (e.g. attached PDFs), and whether you want to compress the entire file or a group of references.
3. Click **Next** and choose a location to save. The Library recommends you add a date to the filename to indicate when the compressed library was created e.g. MyLibrary20130214. **Warning:** very long filenames can prevent compression.

When you open a compressed library (**File ► Open**), EndNote will automatically extract all the files to recreate the original library structure.

This is useful for backing up a library, sending it via email, or transferring it between computers (including between Windows PCs and Macs). Although EndNote also provides a **Save a copy** option, the compressed library option is recommended for backing up your work.

You could also use an EndNote Web account and the synchronisation feature for sharing a group between 2 or more computers.

Important:

There are copyright or licensing issues associated with sharing libraries that contain full-text journal articles as attachments. Please refer to the information in the section **Working with full-text PDFs in EndNote**.

A word about data management

EndNote works most reliably if your store **all** your records in a **single** primary library. For security and peace of mind, your primary library (and indeed all your data and documents) should be regularly backed up to a secure Monash storage facility, especially after making significant changes to your library.

Local backup systems can **fail**, and you can **lose** all your work. This includes external hard drives, USB sticks, discs, and other purely local methods. Commercial or free “Cloud” type stores also have security and ethical storage issues for Monash researchers.

The **Library strongly recommends** you keep your backups on a University network (your personal or departmental network drive, not your computer’s C: drive), or other Monash approved storage system with a multi-location redundant backup system.

One easy option is to **use the Google Drive storage available via your Monash Google account**. This facility is protected by the Monash data security agreement with Google and adheres to acceptable storage protocols for research data (this is NOT the case with any private Google account or any other ‘cloud’ account). Monash Google Drive via your Authcate login is securely and regularly backed up by the University. Instructions for backing up your EndNote Library to your Monash Google Drive are available on the EndNote Library Guide at guides.lib.monash.edu/endnote.

Talk to your Subject/Liaison Librarian for further information about other important data management issues, sign up to a Library Data Management class, or review the Research Data Management information at monash.edu/library/researchdata

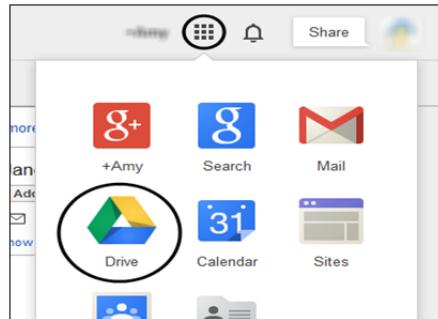
Upload your EndNote library to Google Drive

Important:

It is a recommendation of EndNote that libraries and databases should not be opened or used directly from the cloud storage sync location. Any live sync activity should be paused or stopped completely when you are accessing your EndNote libraries on your local computer. Cloud storage such as Google Drive should only be used as a space for backing up compressed EndNote libraries.

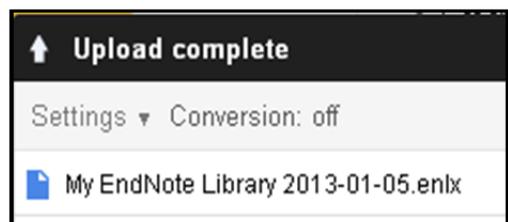
One easy method to back up your compressed EndNote library (and your Word documents) is to use Google Drive, included with your Monash email account.

1. Change to Google Drive by choosing **Drive** from the Google Apps icon located at the top right hand corner of your email.
2. On the left of your screen click the red upload icon, and select **Files** from the drop-down menu.
3. Browse to and select the compressed EndNote library you created earlier. Click **Open**.
4. Wait until the upload is complete.
5. You should see the progress of your upload. The appearance of your upload window may vary depending on your operating system and web browser.



You should create a new backup file every time you make significant changes to your Library.

Each backup should be named appropriately (e.g. by adding the back up date to the file name) to distinguish between versions.



Keyboard shortcuts

There are a range of keyboard shortcuts to make navigating the EndNote interface faster. A full list of keyboard commands can be found in the EndNote X7 User Guide.

Insert selected citation(s) into Word document	Alt + 2
Switch to Word	Alt + 1
Create a new reference	Ctrl + N
Close an open reference or library	Ctrl + W
Close all open references	Ctrl + Shift + W
Open link associated with reference	Ctrl + G
Open file attachment associated with a reference	Ctrl + Alt + P
Edit a reference	Enter
Edit next reference	Ctrl + PageDown
Edit previous reference	Ctrl + PageUp
Copy the formatted citation for a reference	Ctrl + K
Open the Search Panel (search within EndNote)	Ctrl + F
Show all references in library	Ctrl + M
Move between reference fields	Tab
Quit EndNote	Ctrl + Q
Open EndNote help	F1