ECU Library: EndNote 20 Workbook

EndNote is a software program that is used for:

- Managing references.
- Keeping a record of your references in one central place (EndNote library).
- Inserting references into any Microsoft Word document, in your chosen citation style.
- Automatically formatting and inserting a reference list at the end of a Word document that has EndNote citations, in your chosen citation style. Note: at ECU this is usually APA 7th style, but EndNote comes with a large number of styles to choose from, and EndNote enables easier switching between multiple styles.

EndNote 20 is the current version of EndNote, released in October 2020.

Endnote (desktop) is available for ECU staff and students for both on-campus and off-campus use:

- EndNote is available in eLabs on campus for student use. Staff can install it on ECU computers through Software Centre (Windows) or Self Service (Mac).
- EndNote software for Windows or Mac can be downloaded for installation on your home computer. Links and installation instructions are available on the EndNote library guide: https://ecu.au.libguides.com/endnote

EndNote (online) is the online counterpart to EndNote desktop. It allows you to share your library with colleagues or across multiple computers. See the EndNote library guide for further information.

Part One: Set Up an EndNote Library

- Create an EndNote library.
- Select an output style.
- Enter references manually.
- Style notes to ensure your references display correctly.
- Download references from a database.
- Edit references.
- Attach a PDF to a reference.
- Create groups of related references.
- Back up your reference library.

Part Two: Use EndNote in Your Word Document

- Insert in-text citations from EndNote into a Word document.
- Edit and remove citations within a Word document.
- Create a reference list.
- Change the look of your reference list.
- Move text or share a document with EndNote citations.
- Convert to plain text to submit your work.

Examples: Required Fields for EndNote References

Part One: Set Up an EndNote Library

For most EndNote users, it is recommended that you maintain a single EndNote library of references. This will ensure you don't lose track of which library holds which references. Within your library, you can create groups to view all references for one topic or one unit in a single place. All references will remain in the main library, even if they are also in a group.

References can be added manually to your EndNote library or imported from database downloads.

Creating a new EndNote library

1. Open EndNote through your Windows start menu.
2. When EndNote launches, it will prompt you to open or create a library. Choose **Create a new library**.
3. You will be asked to name and save your library. Choose a meaningful name and click **Save**. The library will open on your screen. *If you are familiar with a previous version of EndNote, it might look very different, but don't worry – it works the same way.*

Store your library on your computer hard drive, not in cloud storage (e.g. OneDrive) **or network drives**. Cloud storage can corrupt your library over time.

Once you have an EndNote library, you will need to add some references and set it up for your use.

Selecting an output style

EndNote allows you to format your references in multiple referencing styles, depending on the requirements of the units you study or the publishers to which you're submitting your manuscripts. The most common style in use at ECU is **APA 7th**, which will be used throughout this guide, but many other styles are available in EndNote.

To select APA 7th as your output style, look for the drop-down menu in the bottom right-hand side of your library. By default, it will usually say Annotated. Search for your referencing style in that drop-down menu and click on it. If it is not visible, choose **Select Another Style…** to open the complete list of styles. You can scroll through the list that appears or use the search bar to locate your chosen style.

You can change the output style whenever you wish. Click on the arrow in the bottom right-hand corner to see a preview of a reference in your chosen style.
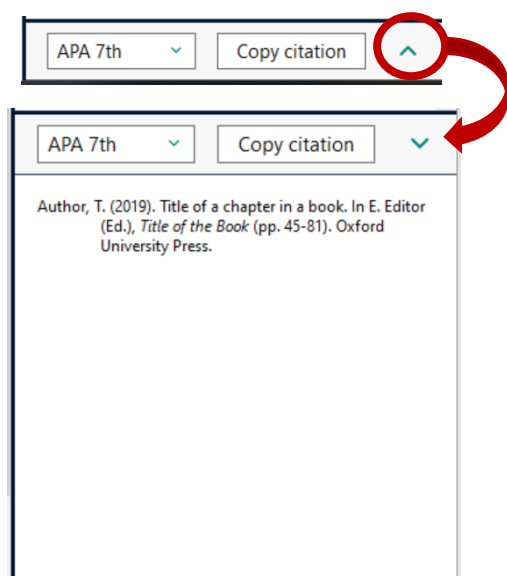
The **Copy citation** button next to the output styles will copy the reference, formatted in your chosen style, to your Windows clipboard.

Adding references to your library: manually entering required details

To enter a reference into your library, select **References** > **New Reference** from the top toolbar, or click on the ⊞ icon in the toolbar. A new reference window will open.

The default reference type is **Journal Article**. Click on the drop-down menu at the right of the Reference Type box to see other reference types, if you are adding a different type of work.

Enter reference details in the appropriate fields. The available fields depend on the reference type you have chosen. Click on the **Save** button and close the window.

Try this: examples at the back of this document show how to manually enter several reference types.

Important notes for entering information in EndNote

EndNote is a computer program with no ability to interpret your intentions. For clean and accurate references, ensure your records are correct and consistent, and match the details on the works you cite. The following notes are based on some of the most common errors we see from EndNote users.

Names

- **Be consistent.** If multiple references have the same author, ensure that the name is entered the same way each time. It helps to choose one way to write every name in your references. We suggest entering the author's surname (family name), followed by a comma, and then the given names or initials, e.g. Jones, Emily C
- **If there is more than one author**, each author must be entered on a separate line. Make sure there are no extra spaces or empty lines after the last author.
- **Check that you aren't missing any authors.**
- **Group authors** must be entered with a comma at the end of the name, e.g. Edith Cowan University**,**
- For **group authors with a comma** *in* **their name**, put a comma after the first comma in their name instead, e.g. Department of Education**,,** Skills and Employment

Style and formatting

- Do not add formatting or fonts to your EndNote records. Enter data in the default font. The software will change your references to include bold, italics, and some extra text such as "vol." (for volume) or "ed." (for edition) as required by the style.
- Capitalise authors and titles as required by your referencing style. EndNote will not change your capitalisation, except in some cases for journal titles (ensure the capitalisation is correct in your term lists).

Fields

- Which fields appear will depend on the Reference Type you choose for each reference.
- The fields **Keywords**, **Abstract**, **Notes**, and **Research Notes** are for your use and will usually not appear in your references.
- Enter **DOIs** starting from the 10, e.g. 10.1534/g3.114.015966 for the DOI https://doi.org/10.1534/g3.114.015966
- Include a web address link in the **URL** field, but make sure there is only one. If there is no DOI, EndNote will include in your reference *all* information entered in this field.
- To attach a PDF, use the File Attachments link. This is visible when you edit the reference, or under **References** > **File Attachments** > **Attach File…**.

Adding references to your library: references downloaded from a database

You don't have to add every reference manually: EndNote allows you to download citations to save time. **Make sure you check that the details of each downloaded reference are correct**. Downloaded citations usually need at least minor editing.

To download references from a library database, WorldSearch, or Google Scholar, follow these steps:

- Locate the Export, Export to EndNote, or Cite function within the database record.

- If downloading multiple citations at once, mark the citations required. There might be a check box or a star.
- Go to the marked items folder or download/export option.
- Export marked items to EndNote. The files often, but not always, end in .**ris** or .**enw**.
- The first time you open one of these files, set your computer to open them with EndNote.

These new references will appear in your library in a new folder called Imported References. This separate folder gives you a chance to edit your new references for accuracy.

For specific database download examples, see below.

1. *ECU WorldSearch*
   - One item: click on Cite, then Export to EndNote or Export to RIS.
   - Multiple items: save desired references. Go to My items and select which references to download using the check boxes. Click on Cite, then Export to EndNote.

2. *EBSCO databases*
   - One item: from the detailed record, choose Export from the right-hand Tools menu. Save using the Direct Export in RIS Format option.
   - Multiple items: mark selected references. Go to Folder View. From there, Select all, Export, and save using the Direct Export in RIS Format option.

3. *Google Scholar*
   First, in your Google Scholar settings, scroll down to Bibliography manager, and select Show links to import citations into EndNote.

   - One item: click Import into EndNote to download the citation.
   - Multiple items: mark selected references. Go to My library. From there, select all using the check boxes, and click on Export.

Editing references in your EndNote library

It is important to check and edit each reference downloaded into EndNote. The quality of your final reference list is directly related to the quality of the information you enter into EndNote.

EndNote will apply formatting rules to match your chosen style, but some rules rely on human judgment. Refer to a referencing guide to check that the EndNote outputs are correct. For APA, use the ECU Referencing Guide: https://ecu.au.libguides.com/referencing

To edit, double-click on one of your references. The reference panel will open on the right-hand side of your library. Click on the word Edit at the top of the panel. You can change any details you wish from here. Don't forget to save your changes when you're done.

Click on Summary and open the preview pane at the bottom (as shown in Selecting an output style) to see how your changes have altered your reference.

What do you need to edit? Check everything that might show up in your reference, but these are the main ones:

- **Names**. Check that all authors' names are present, and that author names are in the correct order, are consistent, and don't include titles or degrees. *For example, a downloaded citation might say John Smith, MD; EndNote will interpret this as last name John Smith, first name MD. Edit this to Smith, John.*
- **Capitalisation**. EndNote will not alter the capitalisation for titles, names, etc., but specific capitalisation is usually required in different reference styles. *Note: one exception is journal titles. EndNote may change this automatically if you have previously used a different form for the same journal. You will need to ensure the journal is correct in the journals term list.*
- **URLs**. If your output style requires a URL, everything in this field will be in your final reference. Delete from this field all but the best URL for your reference.

If you want to delete a reference from your library, click on it once in the library window to select it, and then click and drag to Trash in the left-hand side panel. Alternatively, right-click and select Move References to Trash. Empty the trash to remove it permanently.

Term lists

Term lists are used to maintain the consistency and accuracy of author names, journal titles, and keywords in your EndNote library; and to keep a list of standard abbreviations for journal titles. If you use multiple output styles with different rules about formatting of journal titles (i.e. display full title or abbreviations), using term lists properly will allow EndNote to switch smoothly between the different formats. At ECU, this is common for those who use both APA and Vancouver styes.

Journal title capitalisation in your reference is sourced from these lists. If the title capitalisation in your reference doesn't match what you have typed in the journal title field, check and edit the title here.

You might also wish to import a journal term list if you export citations from medical & health databases, where journal titles are frequently abbreviated.
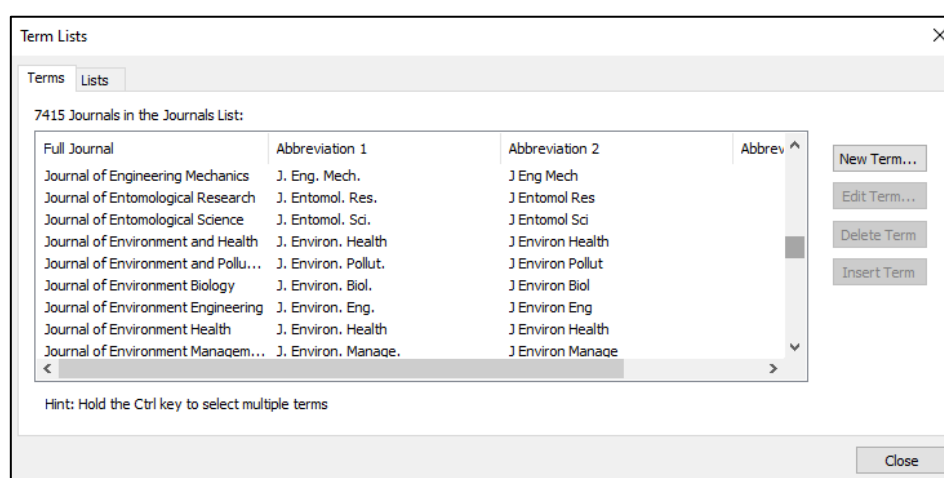
EndNote comes packaged with a number of common term lists you can import for journals. To import these pre-made lists, go to **Library** > **Open Term Lists** > **Journals Term List**. Select and delete all terms currently in the term list (this will not delete any titles from your references). Then go to the Lists tab, and select Import List…. Here you can choose the lists you would like to import, e.g. Medical.txt, and select Open.

You can also check the authors term list to ensure that you don't have multiple entries for the same author (e.g. one entry with the full first and middle names, and one with just initials). This inconsistency may introduce unwanted initials into your in-text references.

Attaching PDF files to your references

If you would like to store your PDF files in EndNote, you can attach them to the associated reference. This will allow you to file and tag them for easier retrieval using the EndNote tools.

To add a file to a reference, double-click on the reference to highlight it. Click on the **+ Attach file** Attach file link, then locate your PDF using the file explorer that will open.

Alternatively, highlight the reference and go to **Reference** > **File Attachments** > **Attach File…**.

Checking for duplicate references

Avoiding multiple copies of the same item in your EndNote library will ensure that the same reference doesn't end up in your reference list twice, and will help you keep your reference details consistent.

Go to **Library** > **Find Duplicates**. If you have any references that EndNote thinks might be the same item, it will open a comparison window so you can see them side by side. Any differences between the two references will be highlighted (here, in blue):
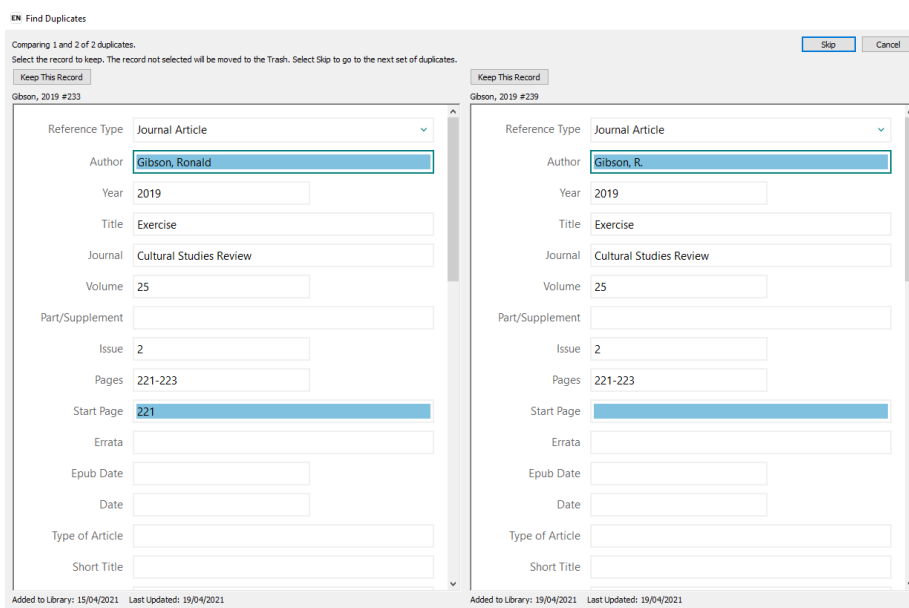
Once you have decided which record has the best or most complete information, click on Keep This Record at the top of the box. If you're not sure, or the two records are actually different items, click Skip to move to the next pair.

Note that if an author's surname or the title of the work differs, EndNote might not pick up the duplicated reference, even if the details are otherwise quite similar.

Creating groups

Using groups, you can bring together references by topic or intended use (e.g. thesis themes, unit title, downloads from a specific database).

From the menu bar, select **Groups** > **Create Group**. This will create a new group in the panel on the left side of the screen. Give your group a meaningful name. References can now be dragged in and out of this group. A single reference can be in multiple groups. Deleting a reference from one of these groups will not delete it from your All References library. Note: do not copy and paste references into a group, as this will duplicate these references.

A smart group allows you to set criteria for your group, using a database-style search tool. Create a smart group by selecting **Groups** > **Create Smart Group…**, naming it, and setting the criteria (e.g. author's name, keyword). All references that match those criteria will be automatically added to the smart group. You can't drag references into or out of a smart group. To add a reference to the smart group, it must meet the criteria; to remove a reference, remove the criteria from that reference. If you delete a reference from a smart group, it will remove the reference from your library completely.

Group sets collect multiple groups together, under the same principle as groups. To make a group set, select **Groups** > **Create Group Set**. You can drag groups into a group set; a group can only be in one group set. Groups are displayed alphabetically, but you can order group sets any way you wish.

Backing up your reference library

Back up your library periodically to ensure you don't lose any important data. You can save compressed EndNote files on a cloud drive or network. It is a good idea to save your backup copy in a different location to where you keep your library.

Go to **File** > **Compress Library (.enlx)…** and create a backup that meets your requirements. If you want to back up your attached PDFs, create a backup with file attachments. If you want to save only a single group or group set, you can do that here. Then choose Next.

Save your backup with a meaningful name, which may include the date so you can find the correct backup more easily later.

Part Two: Use EndNote in Your Word Document

Cite While You Write is the add-in that allows you to insert in-text citations from your EndNote library into your Word documents, and generate and format a bibliography.

This add-in enables EndNote to work within Word. To ensure it works properly, keep the correct EndNote library open while you work, and use the toolbar pictured below to edit, delete, or move any citations.
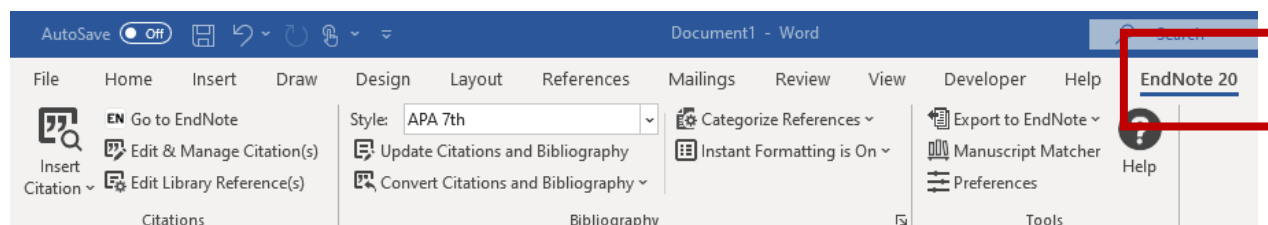
Note: if this toolbar is not visible in Word, check whether the add-in is active in Word's Options (**File** > **Options** > **Add-Ins**). If there are no EndNote add-ins there at all, you may need to reinstall EndNote.

Inserting in-text citations from EndNote into a Word document

Select the referencing style you wish to use from the drop-down menu in the toolbar and open the EndNote library that contains the reference you want to use.

Position the cursor where you want your first in-text citation to be placed within your document. You may need to add a space after the text you have written: EndNote will place the citation exactly where your cursor is.

Click on the **Insert Citation** button and enter a name, keyword, date, or even a letter in the search box to browse. Make sure you are searching within **Libraries** in the drop-down menu to the right.

Highlight the reference you want to add, and hit Insert. You can insert multiple in-text citations if you hold down the Control key while you click on each of the references you want to add. Hit Insert.

If you are using a footnote style, you will need to use the Word References toolbar in conjunction with EndNote. For more information, visit the EndNote guide's law page: https://ecu.au.libguides.com/endnote/law

Creating a reference list using EndNote

A reference list is automatically created from the citations you insert in your document. The order of references and the details included will depend on the rules of the output style selected in the EndNote toolbar in Word. This does not have to match the style you have selected within EndNote.

This reference list will be found at the end of your document.
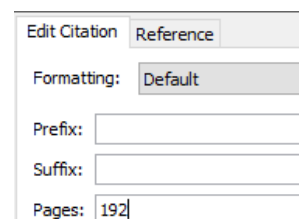
Editing and removing citations in your document

It is important to edit EndNote citations using the Edit & Manage Citation(s) function in the EndNote toolbar. Citations have EndNote coding behind them. Do not try to correct citations as though they are plain text. Your changes will be lost and the document could be corrupted.

To move text that contains EndNote citations, go to the section Converting citations and bibliography to move references and share work.

- Adding a page number

Click on the citation to highlight it. Go to **Edit & Manage Citation(s)** in the EndNote toolbar. This will open an edit box. Check that the reference is highlighted. Add the page number or page range in the **Pages** field and click OK. EndNote will apply any needed formatting (e.g. "pp.").
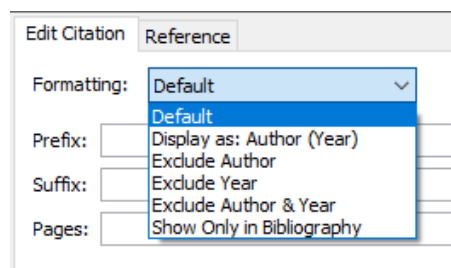
- Removing a citation

Click on the citation to highlight it. Go to **Edit & Manage Citation(s)**. Click on the drop-down arrow on the right-hand side of the Edit Reference button for the citation and choose the option **Remove Citation**. If you added the wrong citation originally, you can use this same menu to add the intended citation with **Insert Citation**.

- Changing the way the citation is displayed

The default format for in-text citations is not the only way they can be displayed. To change the format, go to **Edit & Manage Citation(s)**. Click on the drop-down menu labelled **Formatting**. From here, you can choose the format you desire, e.g. Author (Year) format.

- Adding text to your in-text citation

To add text before or after your citation, go to **Edit & Manage Citation(s)**. Enter the text and any punctuation or spaces that should be before or after the reference to the **Prefix** or **Suffix** fields. You may wish to do this to add comments such as "see also" to your citation.

Editing details in your references

If a word is spelled incorrectly in your reference list, or is in lower case when it should be in capital letters, you will need to:

- Return to your EndNote library and correct the error in the reference there, then
- Click on **Update Citations and Bibliography** in the EndNote tab in Word.
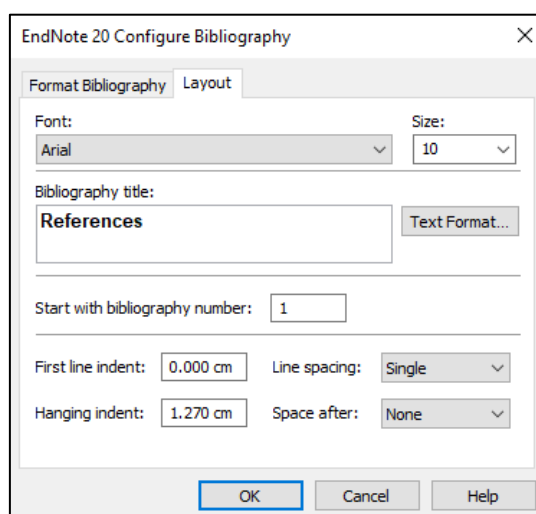
This will update the changes and correct the references in your document as well.

Changing the look of your reference list

To add a heading to your reference list, change the font, or change the line spacing, go to the arrow at the bottom corner of the Bibliography section of the toolbar:
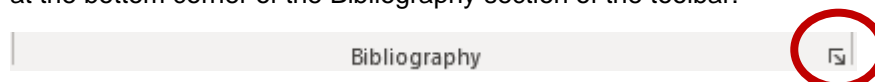
This will open the **Configure Bibliography** box. Click on the Layout tab to access the options.

Line spacing refers to spacing within a reference. Space after refers to spacing between references.

Converting citations and bibliography to move references and share work

If you want to copy and paste sections of your text, especially if you are moving large amounts of text into or within the document, temporarily remove the EndNote formatting to reduce the chances that something will go wrong in your document.

Go to **Convert Citations and Bibliography** > **Convert to Unformatted Citations**.

Your citations will look like this: {Author, 2019 #180}, and your bibliography will disappear.

You can now make changes to your document, move or add new sections, and even delete citations without risk of corrupting your document. Sharing unformatted files with collaborators will also ensure that there is no conflict between your version of EndNote and theirs.

To return the formatting, click **Update Citations and Bibliography**. EndNote will match the unformatted citations to references in your library. If it can't find an exact match, it will ask you to choose from a list of possible citations, or search for the correct reference. This works in a similar way to inserting a citation:

Converting citations to plain text

To submit a final work, convert to plain text. Converting to plain text strips out all EndNote formatting, and will ensure that your final document does not interact with the software used by the person editing or marking your work. This can not be reversed, so it should be the last thing you do.

Go to **Convert Citations and Bibliography** > **Convert to Plain Text**.

You may want to save a copy of the final version with EndNote formatting, just in case you need to make any changes or add more references using EndNote. If you add a new citation to a plain text document, it will create a new reference list with only that item underneath your original reference list.

Examples of required fields for EndNote references

The examples below have been edited to delete unused fields. References are in APA 7th style.

Book

Grellier, J., & Goerke, V. (2018). *Communications toolkit* (4th ed.). Cengage Learning Australia.

Chapter in an edited book

Breen, L. J., & Arnold, J. (2006). Agents for health promotion. In J. Arnold & S. Sheinfeld Gorin (Eds.), *Health promotion in practice* (pp. 124-155). Jossey-Bass.

Journal article

Dunham, I. M. (2019). Landscapes of financial exclusion: Alternative financial service providers and the dual financial service delivery system. *Business and Society Review*, *124*(3), 365-383. https://doi.org/10.1111/basr.12180

If your article has an e-article number instead of page range, you can still use the **Pages** field.

Report

Australian Bureau of Statistics. (2021). *Wage price index, Australia, March 2021* (Cat. No. 6345.0). https://www.abs.gov.au/statistics/economy/price-indexes-and-inflation/wage-price-index-australia/mar-2021

Note: Add a comma after the name for group authors. For reports, if there is a parent organisation, place it in the **Publisher** field, with a comma after the name if needed.