

# EndNote for HDR Students

## Winter Term, 2020

### LEARNING OUTCOMES

After successful completion of this training, participants will be able to:

1. Understand how to use EndNote by creating an EndNote Library, entering references into the EndNote Library from Library Search, Scopus and Google Scholar
2. Import PDF files into EndNote, choose an Output Style, attach a file to a reference, search within the EndNote Library, customise the display window
3. Create Groups and Smart Groups, cite references in MS Word, format the paper / thesis, change Bibliography Format / Layout, edit in-text citations, synchronise and share EndNote Library
4. Create and share references using EndNote Online
5. Seek additional support for EndNote

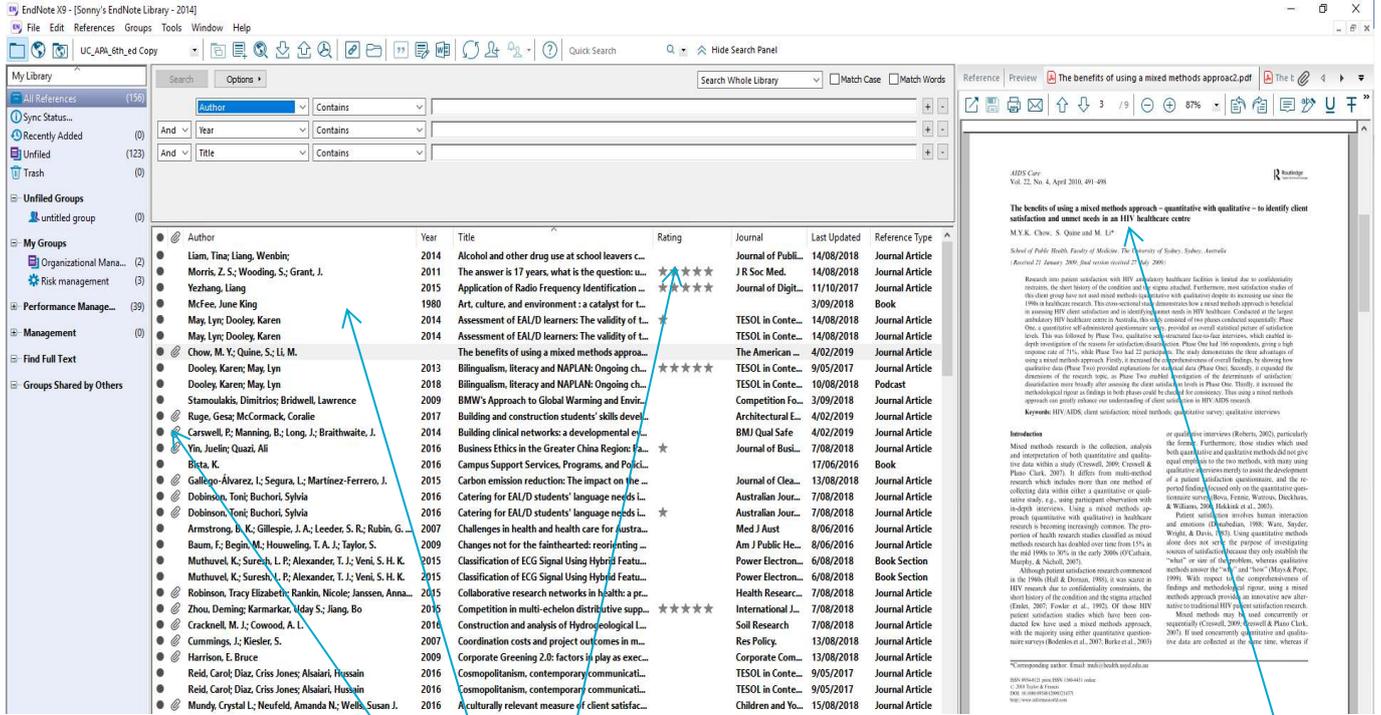
### INTRODUCTION

- What is it? It is a bibliographic management program that
  - Stores and manages references
  - Searches databases and imports references into EndNote
  - Creates bibliographies and inserts in-text citations
- How can you obtain EndNote?
  - [MyUC](#) via EndNote Guide (UC has the latest version i.e. EndNote X9)
  - Disks are available in the Short Loan collection at [Z1001.E63](#) and can be borrowed for 3 days.
  - EndNote is installed on student computers at C:/Program Files (x86)/EndNote X9

### WHAT CAN YOU DO WITH ENDNOTE?

- Create a library that stores your references with unlimited storage.
- EndNote will create in-text citations and a bibliography matching the requirements of your selected style – it has over 6,000 styles to choose from – in your Word document.
- Attach PDFs, sound files, videos, or any other kind of file to your references – up to 45 files per record.
- Synchronise your EndNote library across multiple computers, share references with others, and access your references from anywhere with any Internet browser through EndNote online.

## WHAT DOES A LIBRARY LOOK LIKE?



The screenshot shows the EndNote desktop application. On the left is a sidebar with navigation options like 'My Library', 'All References', and 'Sync Status'. The main window displays a list of references with columns for Author, Year, Title, Rating, Journal, Last Updated, and Reference Type. A preview pane on the right shows a PDF document titled 'The benefits of using a mixed methods approach - quantitative with qualitative - to identify client satisfaction and unmet needs in an HIV healthcare centre'.

**Build your library of references:**  
 Import your PDFs, download references from online databases or manually enter your references. Have EndNote find the full text article for you or manually attach the PDF yourself. Mark your references with a Read/Unread tag and apply ratings to help you identify the more important references.

**Reference / Preview / Attach PDFs**  
 View and annotate your PDFs. Edit your references:  
 Add sticky notes to your PDFs and search for them later. Use the built-in email functionality to quickly share a reference and its file attachments with others.

## ENDNOTE ONLINE

- The simpler, web version of EndNote is known as EndNote Basic. However using EndNote online with the desktop version gives you more features.
- EndNote online allows you to share references with up to 100 colleagues who have EndNote and it also allows you to have access to your EndNote references while you are away from your desktop EndNote.
- Access EndNote online <https://www.myendnoteweb.com/> and create an account.

EndNote online gives you the tools for learning how to do research, cite sources, write term papers, and even matches your manuscript to a scientific journal.

- Create an online account to search, save and use your research sources
- Use built-in connections to search the 5 most popular databases
- Save and organize the references you find (up to 50,000)
- Integrate with Microsoft® Word to properly cite and format your paper
- Choose from the 7 most popular bibliography formats, including MLA and APA style
- Use manuscript matcher to identify the best journal for your research to be published

EndNote online gives you the tools for learning how to do research, cite sources, write term papers, and even matches your manuscript to a scientific journal.

- Create an online account to search, save and use your research sources
- Use built-in connections to search the 5 most popular databases
- Save and organize the references you find (up to 50,000)
- Integrate with Microsoft® Word to properly cite and format your paper
- Choose from the 7 most popular bibliography formats, including MLA and APA style
- Use manuscript matcher to identify the best journal for your research to be published

## WORKING WITH ENDNOTE

- It is recommended that only one EndNote library is used to store all your references.
- It is recommended that the EndNote library is always backed up.

### Open EndNote

- Beside the **Microsoft Start icon** 
- Click on the search Windows button  and type EndNote
- Select **EndNote Desktop** app

### Create a new EndNote Library

- Click on **File > New**
- Name your library, select where you want to save it, and then click on **Save**

## TERM LISTS

### Term Lists

Every new EndNote library has three term lists associated with it: Authors, Journals, and Keywords.

The term lists are automatically updated as you enter references into your library.

The terms in these lists are also used to facilitate data entry using the "Suggest Terms as You Type" feature. This feature suggests terms as you type into fields with term lists linked to them. For example, as you type into the Author field, EndNote suggests author names from your Authors term list to help you with data entry.

When you enter a new term that is not currently in the associated term list, it appears in **red** text to indicate that it is a new term.

**Tools > Open Term Lists**

## ENTER REFERENCES INTO THE LIBRARY

You can enter references into the EndNote Library in a number of ways:

- I. Manually entering references
- II. Searching databases and exporting references into EndNote
- III. Importing PDF files

### I. Manually entering references

- Go to References > New Reference
- In Reference Type, select Journal Article, Book, etc.
- Enter author names as:  
Smith, John Oscar OR Smith, J.O.  
**Note**  
Enter author names on SEPARATE LINES
- Enter corporate authors as:  
United Nations, (add a comma at the end of the corporate name)
- Enter Year as:  
2016; unpublished; in press



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**ADDITIONAL ACTIVITY (SELF-PACED LEARNING / OPTIONAL)**

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**PRACTICE REFERENCES TO USE**

“Alcohol and other drug use at school leavers’ celebrations” by Lam, Tina; Liang, Wenbin  
Journal of public health, 2014, Volume 36, Issue 3, pp 3-10.

Drug education in schools: searching for the silver bullet / edited by Richard Midford,  
East Hawthorn, Vic.: IP Communications, 2006.

Secondary school students’ drug use by Drug Offensive. Dept. of Human Services and Health, 1994.

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**II. Searching databases and exporting references into EndNote (using Google Chrome)**

- **Library Search** (searching UC Library Collections)
  - Perform search
  - Click on an article title
  - Click on **Endnote /RIS**
  - Click on **Download**
  
- **Scopus database**
  - Perform search
  - Select references by clicking in boxes
  - Click on **Export**
  - Select **RIS Format (EndNote, Reference Manager)**
  - Select the kind of information to export e.g. Citation information; Abstract and keywords
  - Click **Export**
  - Click on **Open** (For subsequent selections, click on **RIS export**)
  
- **Google Scholar**
  - Click on **Settings** at the top
  - Under Bibliography Manager, select **Show Links to Import Citations into**.
  - Select **EndNote** from the dropdown list
  - Click **Save**
  - Perform search in Google Scholar
  - Under each result, you will see **Import into EndNote** link. Click on this
  - Click on ... **.enw** file

### III. IMPORTING PDF FILES

- From toolbar, select **File > Import > Folder**
- In the Import File text box, click on **Choose** to select a the Foldr, and click on OK
- At the Import Option text box, select **PDF** from the dropdown menu
- Then click **Import**
- Your selected file(s) will be imported with PDF file(s) attached to the reference(s)

#### **NOTE: DIGITAL OBJECT IDENTIFIER (DOI)**

If your PDF article has a Digital Object Identifier (DOI), it will import into EndNote with a number of fields filled. However, if it does not, only the title field will be filled. The name of the file will be used as the title.

#### **Examples:**

	Polenske, Kar... 2004 Competition, Collaboration and Cooperation: An Uneasy Triangle in Networks of Firms and Regions	Regional Stu... 7/07/2017
	<Article_How to make your failing students pass.pdf>	12/03/2015 Journal Article
	<47784791.pdf>	12/03/2014 Journal Article

### MANAGING YOUR ENDNOTE LIBRARY

#### Choose an Output Style

There are two ways to change the referencing style in EndNote: by using the drop-down menu in the toolbar, or by using the Edit menu.

##### **Using the dropdown menu**

- From the referencing style drop-down menu in EndNote toolbar, select the desired style
- If your favourite style is not listed there, choose **Select Another Style**. This will open a comprehensive list of output styles
- Select a new style, and click **Choose**
- The selected style will appear in the dropdown menu in the toolbar

### Using the Edit menu

- From the menu bar select **Edit > Output Styles > Open Style Manager**. This will open the same comprehensive list of output styles
- Choose the output style(s) required and close the window. It now appears in the dropdown menu in the toolbar

To see how the selected output style looks,

- Highlight a reference
- In the Reference/Preview/Attached PDF pane, click on **Preview**

### ATTACH A FILE TO A REFERENCE

Files (such as PDFs, graphic and word processing files, spreadsheets and other formats) can be uploaded to references in EndNote. You need to select the reference in your EndNote library, then use:

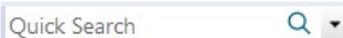
#### Method 1

- From the **References** menu, select **File Attachments**, then **Attach File**
- In the dialog box, select the file that you wish to attach to your reference, then click **Open**

#### Method 2

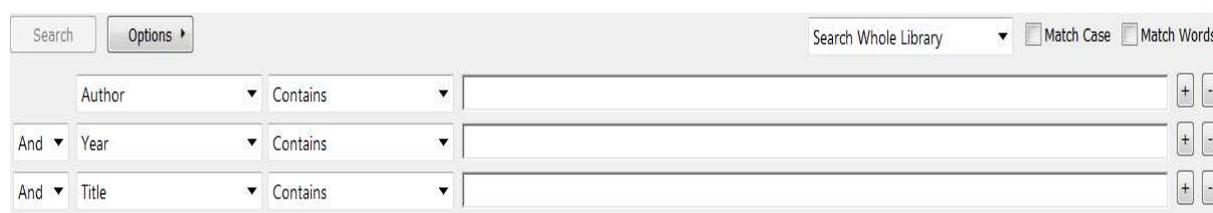
- Right-click within the Reference pane, and select **File Attachments**, then **Attach File**
- In the dialog box, select the file that you wish to attach to your reference, then click **Open**

### SEARCHING YOUR ENDNOTE LIBRARY

Using the Quick Search box 

- Use the Quick Search box to search for words or terms within references

#### Using the search field option



The screenshot shows a search interface with the following elements:

- A "Search" button and an "Options" dropdown menu.
- A "Search Whole Library" dropdown menu.
- Two checkboxes: "Match Case" and "Match Words".
- Three search criteria rows:
  - Row 1: "Author" (field), "Contains" (operator), and an empty search box.
  - Row 2: "And" (connector), "Year" (field), "Contains" (operator), and an empty search box.
  - Row 3: "And" (connector), "Title" (field), "Contains" (operator), and an empty search box.
- Plus and minus buttons to add or remove search criteria.

- Click on **Show Search Panel** on the right of the Quick Search box to search by specific fields
- Type your search query and select your criteria, then click **Search**

## Customising the display window

- You are able to sort your references by the column headings
- Click on any heading to sort by that field

## Selecting Fields to Display

- To change the display of the fields, select from the toolbar **Edit > Preferences > Display fields**
- Change Heading column using Field column entries

## CREATE GROUPS

### Custom Group

A **Custom Group** allows you to add references individually to a group.

- Click on **Groups** and select **Create Group**
- Name the new group box that opens (e.g. "Chapter 1")
- Select the reference(s) to be moved to the new group, then either:
  - 'drag and drop' into the new group box
  - right-click on a reference and select **Add References To** and select the group you wish to add a reference to
  - Click on **Groups** and select **Add References to > [Group name]**

## SMART GROUP

A **Smart Group** is compiled automatically based on the results of your search.

- Click on **Groups** and select **Create Smart Group**
- Name the Smart Group Name box that opens
- Select search criteria using the available fields and click **Create**
- The references in your library that match your criteria will be automatically moved into your smart group

## ENDNOTE CAN FIND THE FULL TEXT ARTICLE FOR YOU

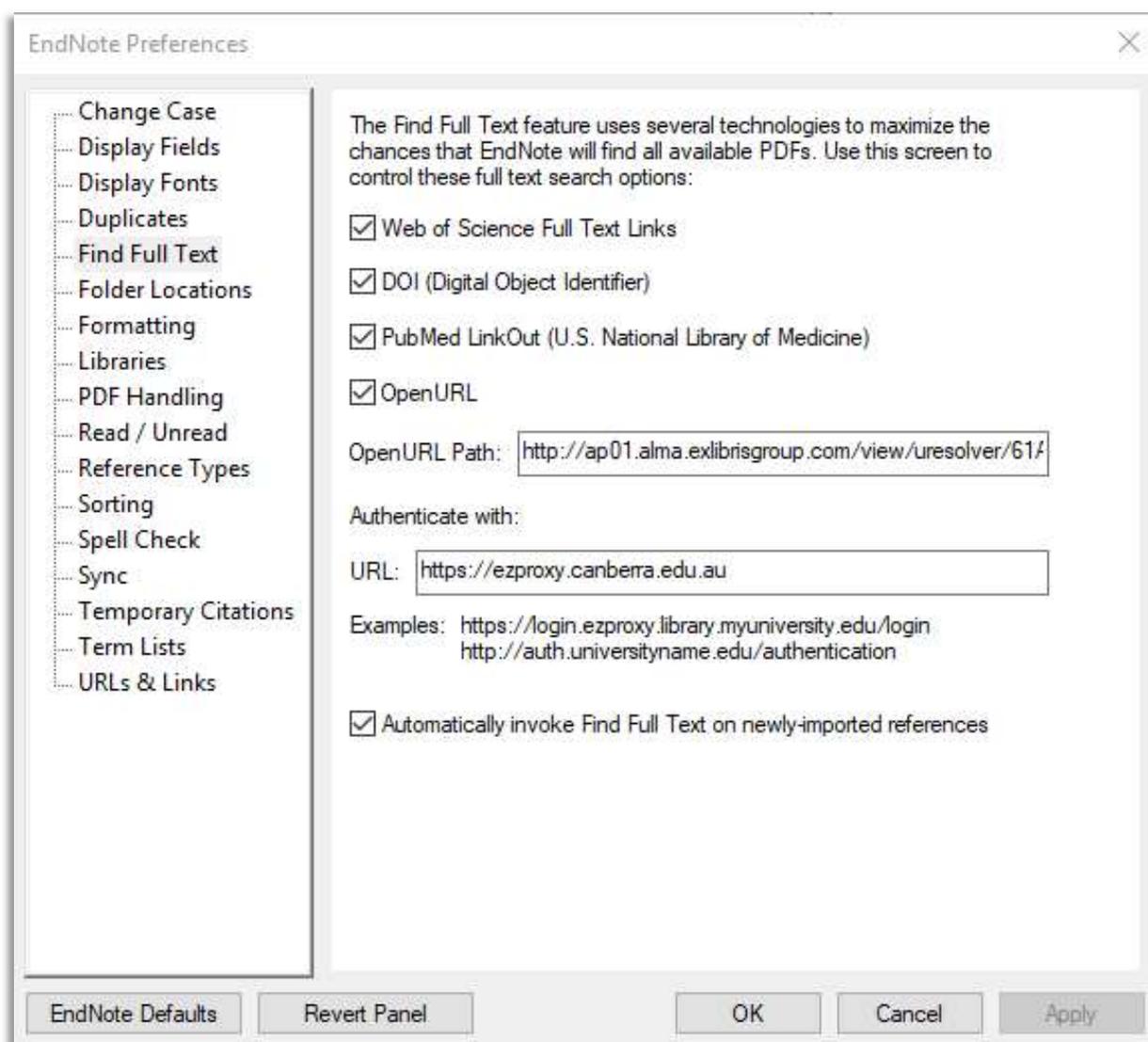
- Go to **Edit > Preferences**
- Click on **Find Full Text** and enter the OpenURL and the authentication URL

**The open URL is:**

[http://ap01.alma.exlibrisgroup.com/view/uresolver/61ARL\\_CNB\\_INST/openurl](http://ap01.alma.exlibrisgroup.com/view/uresolver/61ARL_CNB_INST/openurl)

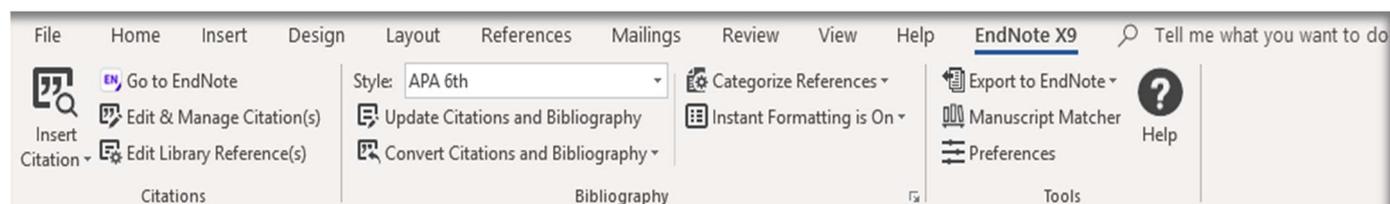
**and the authentication URL is:**

<https://ezproxy.canberra.edu.au>



## CITE REFERENCES IN WORD

- Open a document in Word
- Place the cursor in your document where you would like a citation to appear
- Click on the **EndNote X9** tab
- Click on **Insert Citation**



At the same time, EndNote creates a bibliography at the end of the document.

## FORMAT YOUR PAPER/THESIS

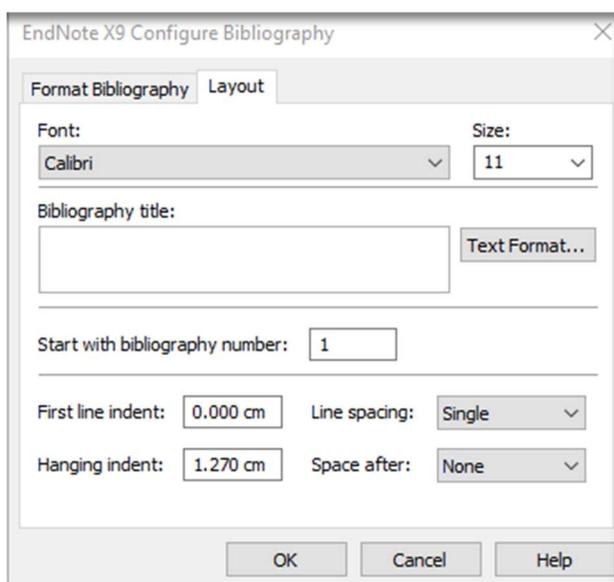
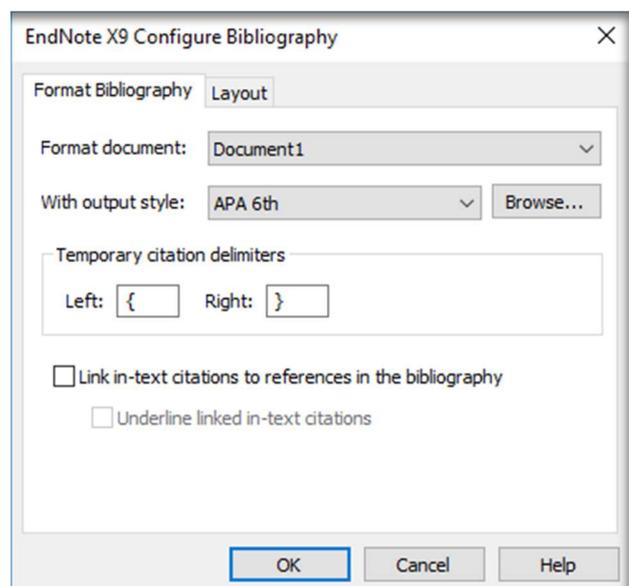
### Referencing style

In EndNote, use the style dropdown list to pick a style or choose **Select Another Style** to see a bigger list of styles. More styles are available for download at <http://endnote.com/downloads>

In Word, click on **EndNote X9** tab. Make sure that the Style mirrors the style selected in EndNote.

### Changing Bibliography Format/Layout

Click on the Bibliography group arrow for options to format your bibliography further or change its layout.



## EDIT IN-TEXT CITATIONS

You may wish to modify citations to remove author or year from the citation bracket, add page numbers or add “see also”.

In Word,

- Right click on an in-text citation
- Select **Edit Citation(s) > Exclude Author** or **Exclude Year**.
- Select **Edit Citation(s) > More**

OR

- Select **Edit & Manage Citation(s)** in EndNote menu
  - I. Put page numbers in Pages box e.g. 5. OR add in Suffix box e.g. , p. 5. Click **OK**
  - II. Add in Prefix box e.g. see also[space]

## SYNCHRONISING AND SHARING ENDNOTE

### Sync Library

Good for backing up.

### Collaboration: using Endnote & EndNote online

There are several options for sharing access to

1. EndNote desktop
2. EndNote online

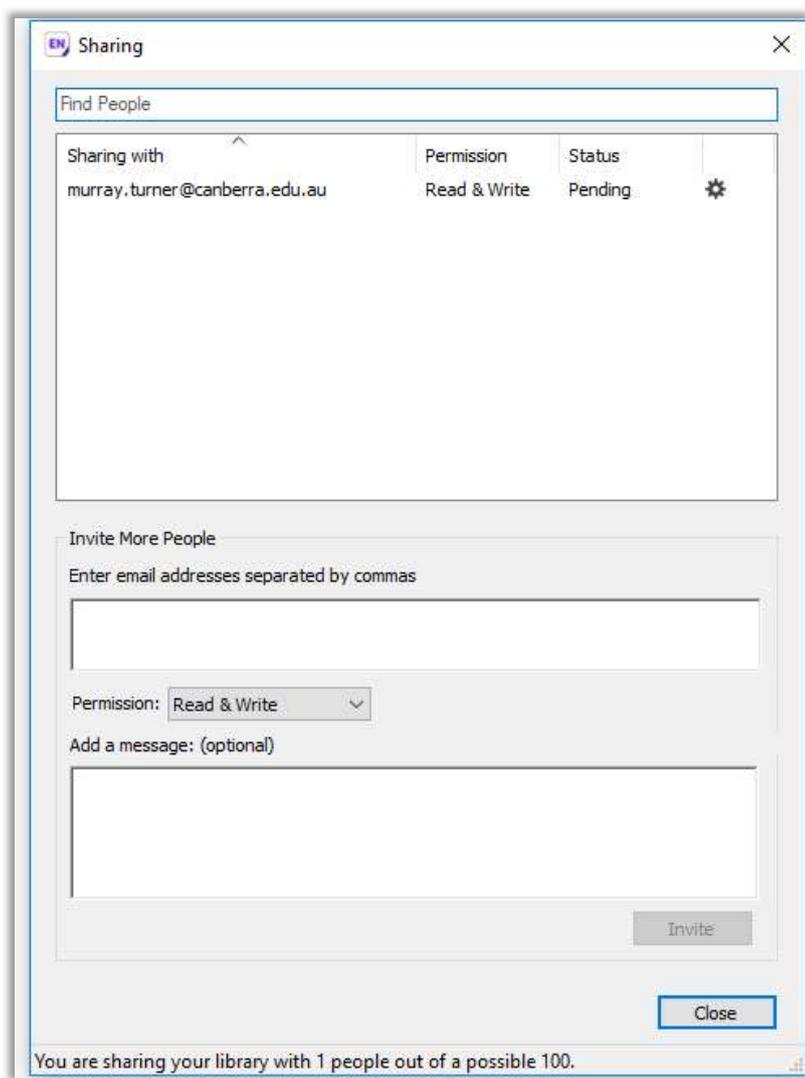
### Sharing EndNote desktop via Share Library

Share your desktop library with up to 100 other people using the Share Library function. All collaborators must be using the latest version of EndNote.

**Caution:** Your collaborators have full access to your library, and any changes made are permanent.

#### To establish this collaboration:

1. Sync your library
2. Click **File > Share OR the Share Library icon**
3. In the Sharing dialogue box, enter the email addresses of your collaborators' accounts
4. Click **Invite**
5. Click **Close**



### To access a library shared with you:

1. Click **Accept** on the email sent from the library's owner
2. On EndNote, click **File > Open shared library**
3. Select the email address of owner of the shared library
4. Click **Open**



**Quick Search**  
 Search for   
 in All My References   
 Search

**My References**  
 All My References (231)  
 [Unfiled] (159)  
 Quick List (0)  
 Trash (1) Empty

**My Groups**

- Human Resource Management (20)
- Leadership and Management (0)
- Leadership and Management (9) 
- Logistics and Supply Chain Ma... (16)
- Misc (1)
- Obesity in Children (4)
- Organizational Management (2)
- Patent Management (1)
- Project management (19)
- untitled group (0)

**Groups Shared by Others**

- Change management - Academic ... (9) 
- Health (24)

Shared Library

## SHARING WITH ENDNOTE ONLINE

1. Logon to your EndNote online account
2. Click on **Organize > Manage My Groups**
3. Select **New Group** and name it
4. In **My References** select the citations you would like to add into the new group
5. In **Add To Group** click on the drop-down list **and select your group**
6. Your references are immediately added to the selected group

## TO SHARE GROUPS:

1. In EndNote online, click on **Organize** and then on **Manage My Groups**
2. The Manage My Groups window opens and shows the groups you have created and their status
3. In the **Share** column, tick the square box of the group you wish to share and choose **Manage Sharing**
4. Click on **Start sharing this group**
5. The Add E-mail Addresses to window opens; add email addresses for those you wish to share your group with
6. Select the button to allow the person to **Read Only or Read & Write**
7. Click **Apply**

**ADDITIONAL ASSISTANCE**

- EndNote Guide <http://canberra.libguides.com/endnote>
- [Lynda.com](http://Lynda.com)
  - Collection of online training videos including: Microsoft Office software, SPSS, NVivo, and more.
  - Follow the Lynda.com link and log in. Click on "No, I have never had an account", then **Create a Profile** to select location and area of study.
  - Refer "EndNote Essential Training"
- EndNote Training (Clarivate) <http://endnote.com/training>
- [AskALibrarian](http://AskALibrarian)
- [EndNote.com/support](http://EndNote.com/support)
  - Ask the EndNote user community
  - EndNote FAQs
  - Knowledgebase
- E-mail: [LibraryLiaison@canberra.edu.au](mailto:LibraryLiaison@canberra.edu.au)
- [Crandon Services](http://Crandon Services)
  - Phone: (02) 6559 5777
  - International: +61 2 6559 5777
  - Website: <https://www.crandon.com.au/index.html>

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