ENDNOTE TRAINING MANUAL

WINDOWS & MAC

Learning Outcomes

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

- Create an EndNote Library, enter references into the EndNote Library from Library Search, Scopus and Google Scholar.
- Import PDF files into EndNote, choose an Output Style, attach a file to a reference, search within the EndNote Library, customise the display window.
- 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.
- Create and share references using EndNote Desktop & Endnote Online.
- Seek additional support for EndNote.

At the end of this session – please scan the QR code to leave feedback.

We are always looking to improve.

Training material updated SE 03/06/2025

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INTRODUCTION - WHAT IS ENDNOTE DESKTOP

- Endnote is a reference management program that:
  - stores and manages references & attachments,
  - searches databases and imports references into EndNote and
  - in a word document it assists in inserting citations & automatically populates a reference list.

- **How can you obtain EndNote?**
  - Information on accessing Endnote Desktop on UC computers and your personal device is available on the Endnote guide. (https://canberra.libguides.com/endnote)

WHAT CAN YOU DO WITH ENDNOTE DESKTOP?

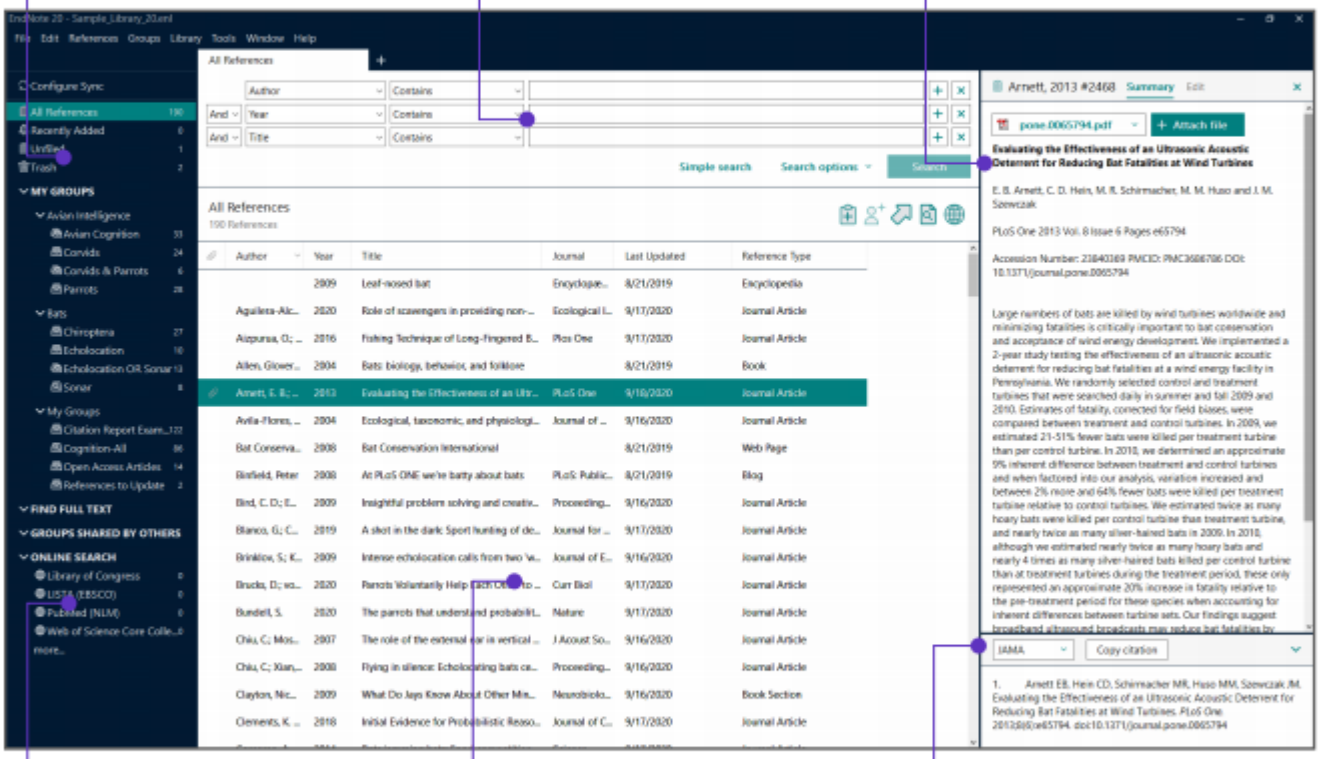
- Create a library for your references & attachments with unlimited storage.
- Attach PDFs, sound files, videos, or any other kind of file to your references – up to 45 files per record.
- Sort your references into personalised groups.
- Set filters so references are automatically moved to groups when downloaded to your library.
- Import folders of PDFs into your library – automatically populating reference fields.
- Easily move between reference styles - over 7,000 styles to choose from.
- Insert citations & references in word document.
- Sync library with Endnote Online / Endnote Web.
- Share references & PDFs with other Endnote users.

WHAT DOES A LIBRARY LOOK LIKE?

The **Groups** panel shows you both default groups and groups or group sets that you create for your research projects.

Use the **Advanced search** panel to find an item in your library or to query a remote database for new references to capture.

The **Summary** tab displays a detailed overview of a selected reference. Quickly alter reference metadata from the **Edit** tab.



Initiate an **Online Search** by selecting a favorite **connection file** or press **more...** to browse your complete list of databases.

The **Reference List** panel shows the individual references stored in your EndNote library, also known as library records.

The **Preview** panel shows you how a reference would appear formatted with a specific output style.

ENDNOTE ONLINE for Desktop users

Endnote Online – available to all users that have access to Endnote Desktop.

- Save and organize references online without Endnote Desktop.
- Endnote Desktop can sync to Endnote Online – creating a backup for your Endnote library.
- EndNote Online allows you to share references with up to 1000 colleagues who have EndNote.
- Integrates with Microsoft Word to use the application Cite While You Write (CWYW) – plugin.
- Some Endnote desktop features are included with the online version – create groups, share groups, check for duplicates & searching within certain databases.

Endnote online information (https://clarivate.com/academia-government/training-support/endnote/endnote-online/).

Training video - Endnote Online Essentials

An Endnote online account can be created via the URL - myendnoteweb.com

ENDNOTE WEB

- An online Endnote interface ***exclusively available to Endnote 21 Desktop users***.
- Interface / appearance – similar to Endnote desktop.
- Integrated with MS word – via CWYW plugin.
- *Will* include all the features of Endnote Online – currently does not have sharing option.
- *Will* include some features previously only available in Endnote Desktop.
- File attachment storage unlimited

Endnote Online & Endnote Web can be used at the same time. They both use the same account – but the interface & options they provide differ.

Endnote Web Information - Video

Information on how to Activate EndNote Web

An Endnote Web account can be created via the URL - web.endnote.com

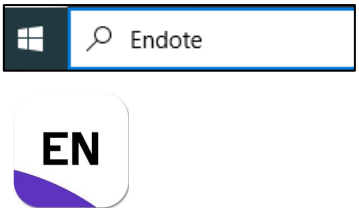
** For comparison information on the various types of Endnote options – please check this page on our library guide.*

1. WORKING WITH ENDNOTE

- **It is Essential** that Endnote is not saved to Cloud storage. Some examples of Cloud storage include SharePoint, OneDrive, Google Drive and iCloud. For further information please see Clarivate warning on using Cloud Storage.

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

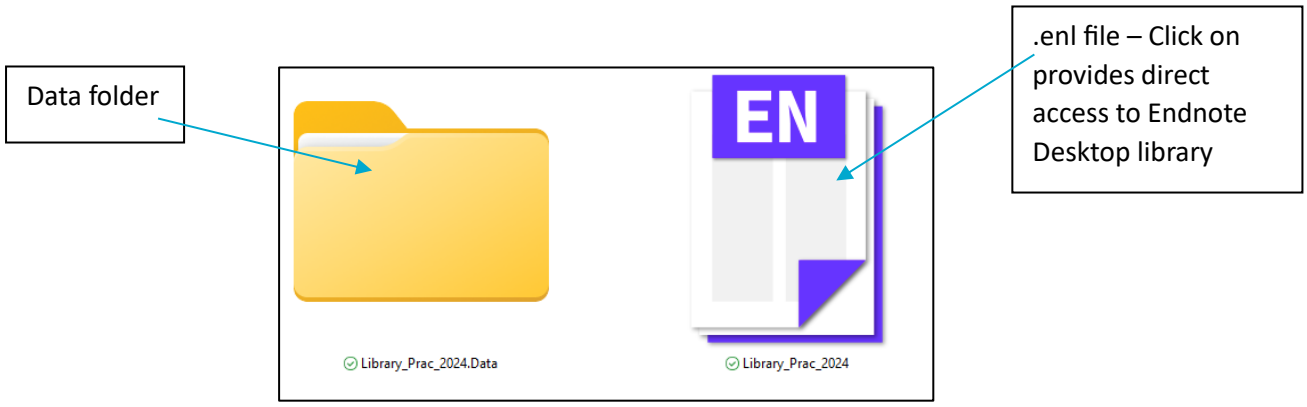
Open EndNote



1. Beside the **Microsoft Start icon**
2. Click on the search Windows button
3. Select **EndNote** Desktop app

Create an EndNote Library

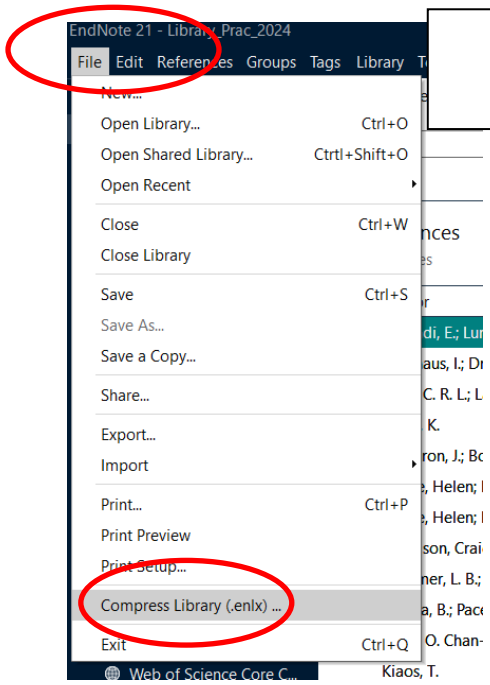
1. Click on **File > New**
2. Name your library (TIP: Give it a specific name, not ''MyEndNote Library'') select where you want to save it, and then click on **Save.**
3. This will create a **Data folder** & **.enl file**. Both the folder & the file **MUST** be kept together in the same location.
4. To open your Endnote desktop library, click on the purple .enl file only. The .data folder is used by the Endnote Desktop program.



Backing up an Endnote Library

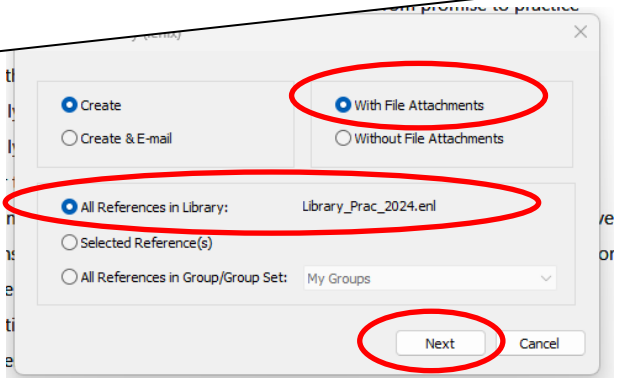
Endnote 21 & 20 has the option to create a compressed backup of your Endnote library. Instead of the separate files – Endnote will create a zipped folder containing a copy of both your data folder & .enl file – an enlx folder.

Compressed copies of your backup can then be saved on Hard drive, USB or cloud. When you need to access a backup copy – before unzipping compressed folder – remove the compressed folder from the cloud & save to computer. Once off the cloud storage – the compressed folder can be safely unzipped. As noted above, Endnote desktop is not compatible with the cloud & this includes unzipped / not compressed backup storage of libraries.

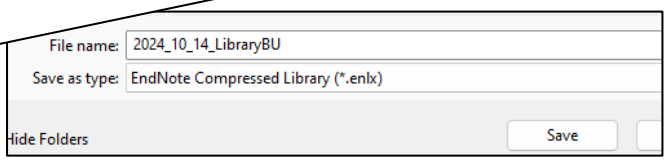


1. File tab – dropdown menu -select – 'Compress Library'.

2. Check default is saving library 'With File attachments'. Select 'Next'.



3. Give folder a name to easily identify date of backup. Save.

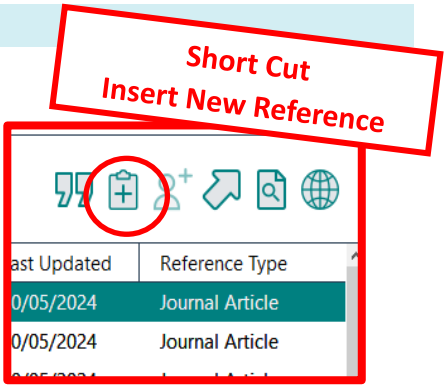


4. Data folder & .enl file – are now stored in a zip folder

Video of making a compressed backup copy.

https://share.vidyard.com/watch/2ErCSfttHUtq7VVwk5rsTQ

2. ENTER REFERENCES INTO THE LIBRARY



You can enter references into the EndNote Library several ways:

1. Manually entering references.
2. Searching databases and exporting references into EndNote.
3. Importing PDF files.

I. Manually Entering References

Go to References > New Reference

a. From '**Reference Type**' – select from the drop-down arrow, the type of reference you are adding – website, book, electronic article…

b. Enter **author name** as: Smith, John Oscar OR Smith, J.O.
Enter additional author names on SEPARATE LINES

c. Enter **corporate author** as:
University of Canberra, (add a comma at the end of the corporate name)

d. Enter **Year** as:
2021; unpublished; in press

e. Fill in the remaining details (depending on the chosen Reference Type).

f. Click on the Save button.

Mac users:

Endnote 20 – no save option – click on red dot to close – save option will display.

Endnote 21 – save option – button on top right.

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.

Library > Open Term Lists (Authors Term List, Journals Term List, Keywords Term List)

ADDITIONAL ACTIVITY (SELF-PACED LEARNING / OPTIONAL)

PRACTICE REFERENCES TO USE

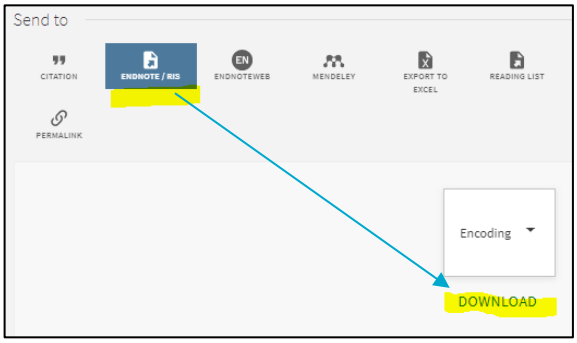
"Alcohol and other drug use at school leavers' celebrations" by Lam, Tina; Liang, Wenbin Journal of Public Health, 2014, Volume 36, Issue 3, pp 3-10.

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.

II. Searching Databases and Exporting References into Endnote

Library Search (searching UC Library Collections)



1. Perform a search.
2. Click on an article title.
3. Click on **Endnote / RIS**
4. Click on **Download**

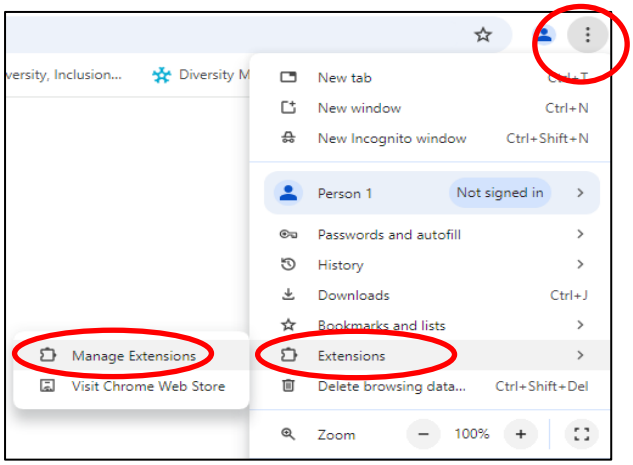
- **Scopus database**
  i. Perform a search.
  ii. Select references by clicking in boxes.
  iii. Click on **Export**
  iv. Select **RIS Format (EndNote, Reference Manager)**
  v. Select the kind of information to export e.g. Citation information; Abstract and keywords
  vi. Click **Export**
  vii. Click on **Open** (For subsequent selections, click on **RIS export**)

- **Google Scholar**
  i. Click on **Settings** at the top.
  ii. Under Bibliography Manager, select **Show Links to Import Citations into**.
  iii. Select **EndNote** from the dropdown list.
  iv. Click **Save**
  v. Perform search in Google Scholar
  vi. Under each result, you will see **Import into EndNote** link. Click on the link.
  vii. Click on **… .enw** file

III. Endnote Click

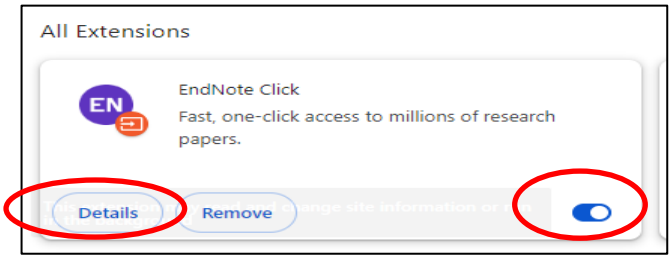
Endnote Click is a plugin that **captures the reference & the PDF – at the same time** – while you are searching in the library databases or general websites. Not all sites will allow Endnote Click plugin. Endnote click browser plugin is automatically available with Endnote 20 & Endnote 21, but it may not be automatically enabled.

Instructions below are for **enabling the Endnote Click plugin & setting it to show in your toolbar** – using the Chrome browser.



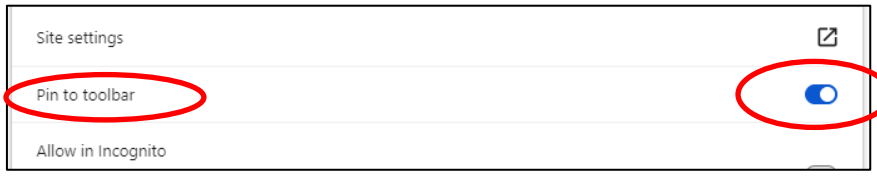
1. Click on 3 dots – top right.

Drop down menu – select '**Extensions**' – then '**Manage Extensions**'.

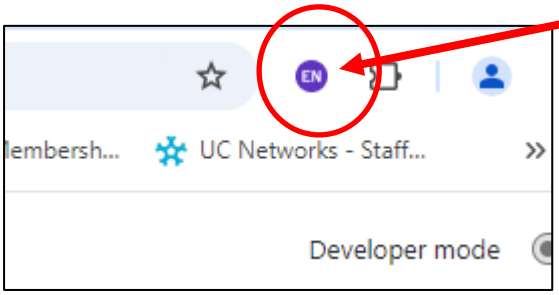


2. Slide button on bottom right to enable Endnote Click. Shows as blue when enabled.

Click '**Details**' button.



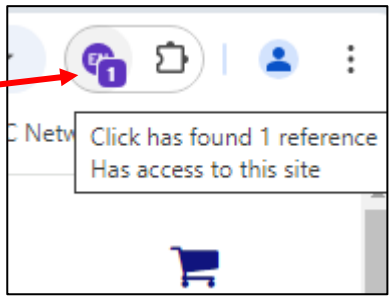
3. **For Endnote Click to show on your Toolbar** – slide the button next to 'Pin to toolbar' – when button shows blue the small purple Endnote icon will be visible in the toolbar.



Now when searching databases & websites – Endnote Click plugin & pop-up will indicate when a PDF is available. PDF's & references downloaded into Endnote Click locker can later be downloaded into your Endnote library.

Endnote Click – toolbar.

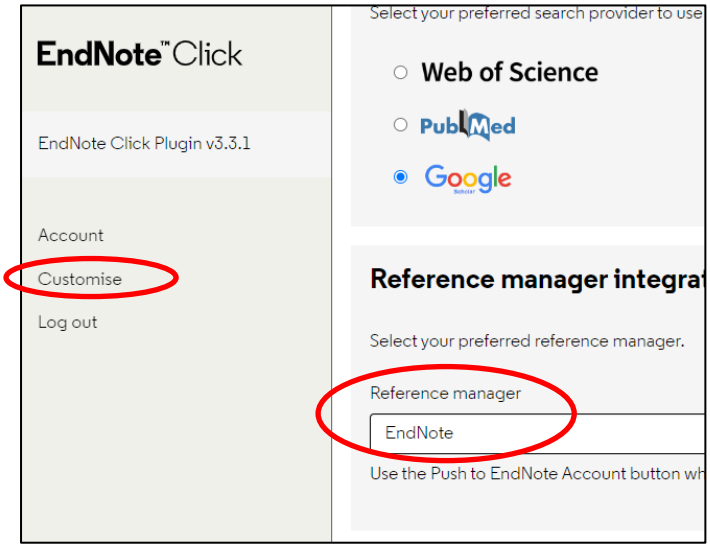
When reference & PDF found the plugin icon shows the number of references & PDF's found. Clicking on icon displays option to view PDF, download PDF to computer or export reference & PDF directly to Endnote.



Endnote Click – pop-up

When a PDF is found – a pop-up on bottom left displays. Click on the pop-up and the PDF automatically imports into Endnote click locker. From the Endnote click locker PDF's can be read, tagged & exported to your Endnote library.

Setting Endnote as your default reference manager in Endnote Click Locker



From the Main Endnote Click Locker menu – select '**Settings**'.

In the settings section – select '**Customise**' then from the drop-down menu – select '**Endnote**'.

Clarivate information on using Endnote Click is here.

IV. Importing PDF Files

1. From toolbar, select **File > Import > Folder**
2. In the Import File text box, click on **Choose** to select a the Folder, and click on OK
3. At the Import Option text box, select **PDF** from the dropdown menu
4. Then click **Import**

Your selected file(s) will be imported with PDF file(s) attached to the reference(s)

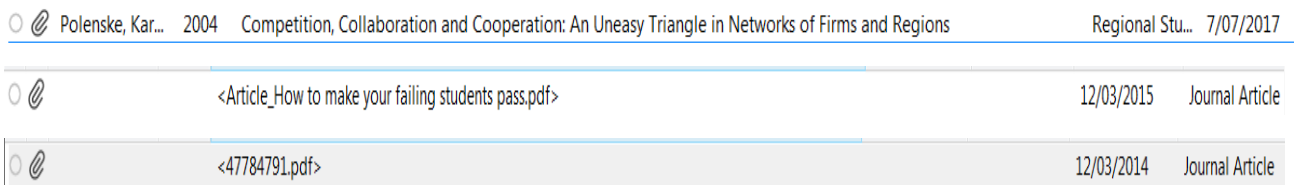
Digital Object Identifier (DOI)

To cite this article: Tanya Anne Serry & Lorraine Hammond (2015) What's in a word? Australian experts' knowledge, views and experiences using the term dyslexia, Australian Journal of Learning Difficulties, 20:2, 143-161, DOI: 10.1080/19404158.2015.1089916

To link to this article: https://doi.org/10.1080/19404158.2015.1089916

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:



3. MANAGING YOUR ENDNOTE LIBRARY

Download UC Referencing output style

University of Canberra referencing output styles are available to download via the Endnote guide.

From the Endnote guide – select the **Referencing Styles** tab – select the Referencing Style to download & follow the step by step instructions to save the output style to Endnote.

Choose an Output Style

There are two ways to change the referencing style in EndNote: by using the drop-down menu in the Preview panel (bottom, right-hand corner of the EndNote Library) or by using the Tools menu.

Method 1

Using the dropdown menu (from the Preview panel)

1. From the referencing style drop-down menu in Preview Panel, select the desired style (located on the bottom, right-hand corner of the EndNote Library, refer to the screenshot on the next page).
2. If your favourite style is not listed there, choose **Select Another Style**. This will open a comprehensive list of output styles.
3. Select a new style and click **Choose.**
4. The selected style will appear in the dropdown menu in the preview panel.

Method 2

Using the Tools menu

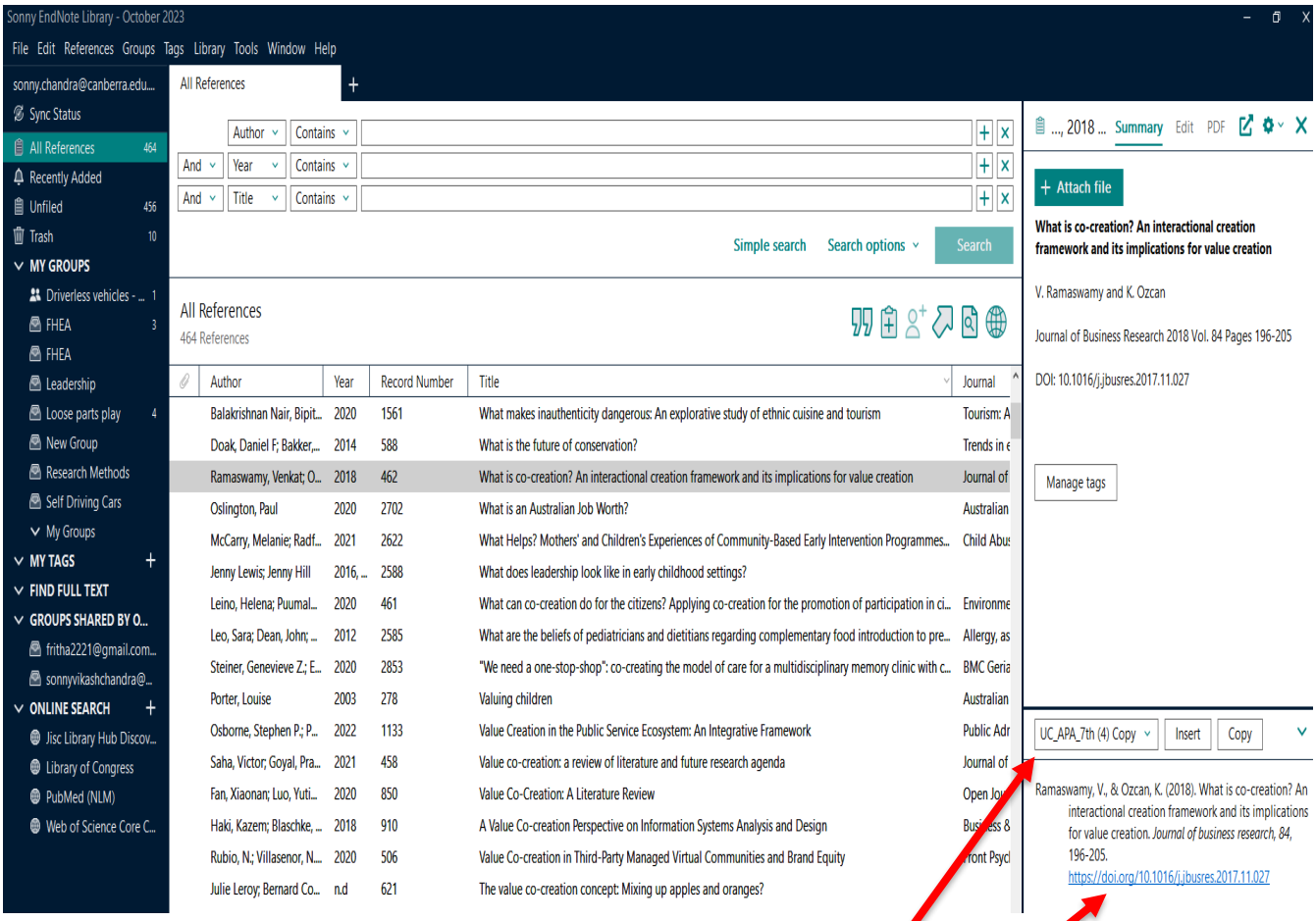
1. From the menu bar select **Tools > Output Styles > Open Styles > Open Style Manager**. This will open a comprehensive list of output styles.
2. Choose the output style(s) required and close the window. It now appears in the dropdown menu in the preview panel.

For Mac users

Tools – Output Styles – Open style manager

To see how the selected output style looks,

- Click on the reference, then move to the Preview panel, located at the bottom right-hand corner of the EndNote Library (refer to the screenshot below).



The Preview panel shows you how a reference would appear formatted with a specific output style.

4. Attach a File to a Reference

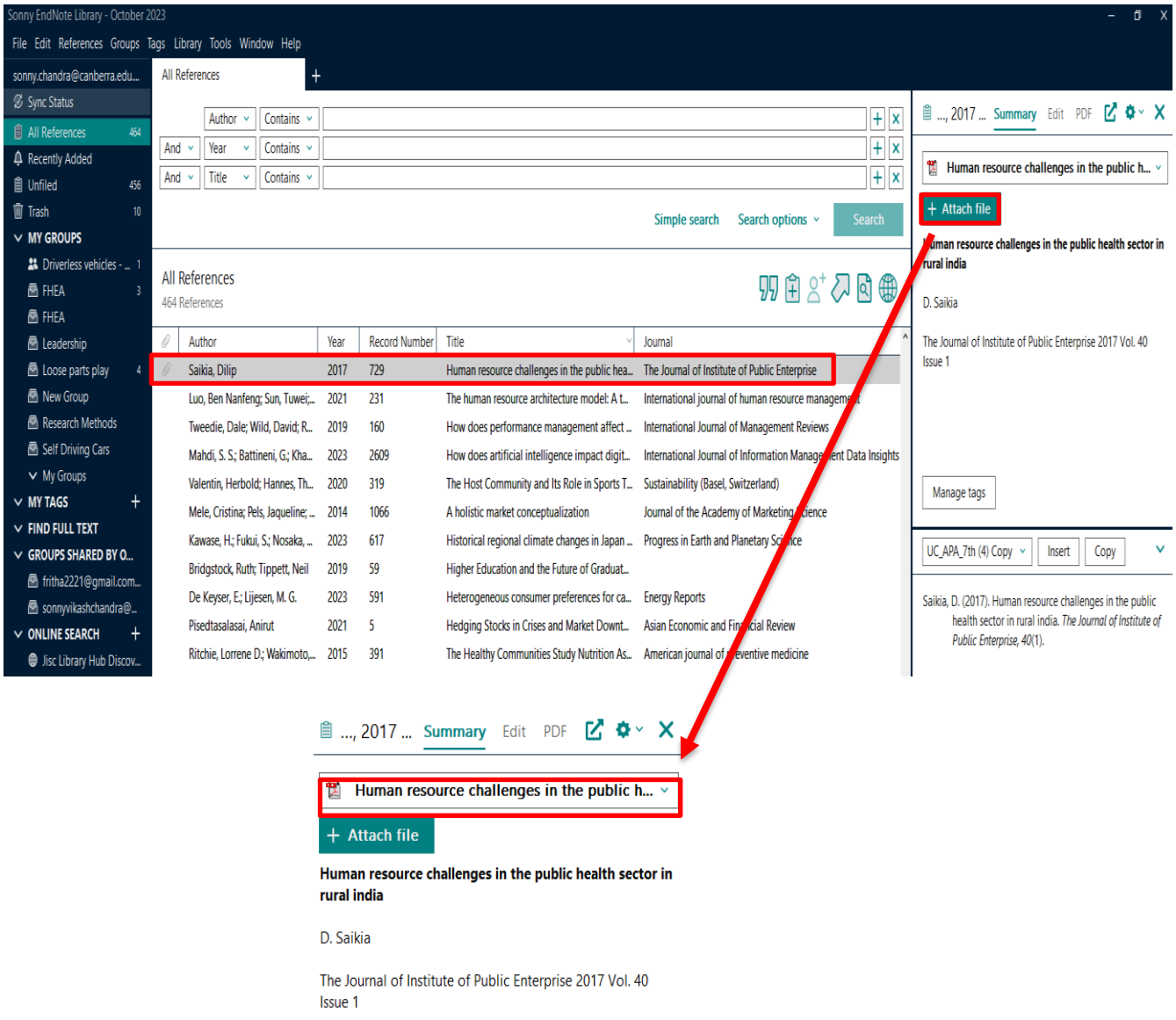
Files (such as PDFs, graphic and word processing files, spreadsheets and other formats) can be uploaded to references in EndNote. You need to select the reference in your EndNote library, then use:

Method 1

1. From the **References** menu, select **File Attachments**, then **Attach File**
2. In the dialog box, select the file that you wish to attach to your reference, then click **Open**
3. Click on the Close button and then click on Save

Method 2

1. Click on the reference, and click on **Attach File,** locate the file to attach, then click on Open
2. The file will now be attached to the record / reference.
3. Click on the Close button and then click on Save

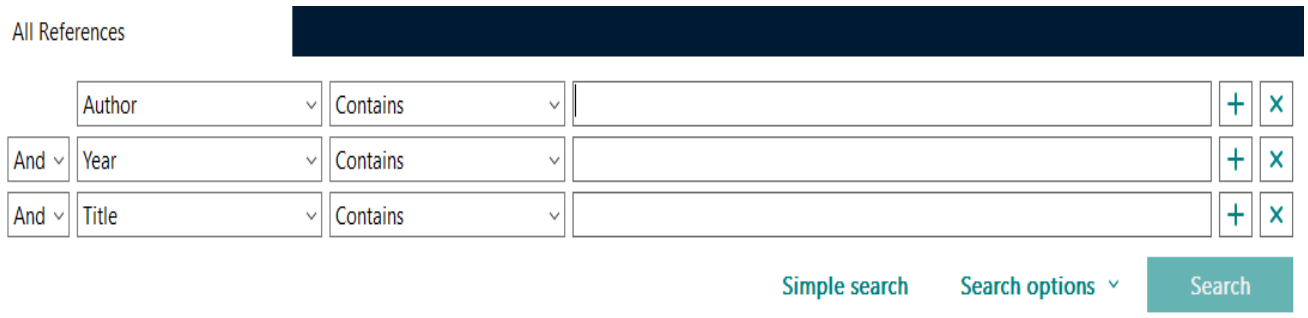


5. Searching your EndNote library

Using the Advanced Search Feature

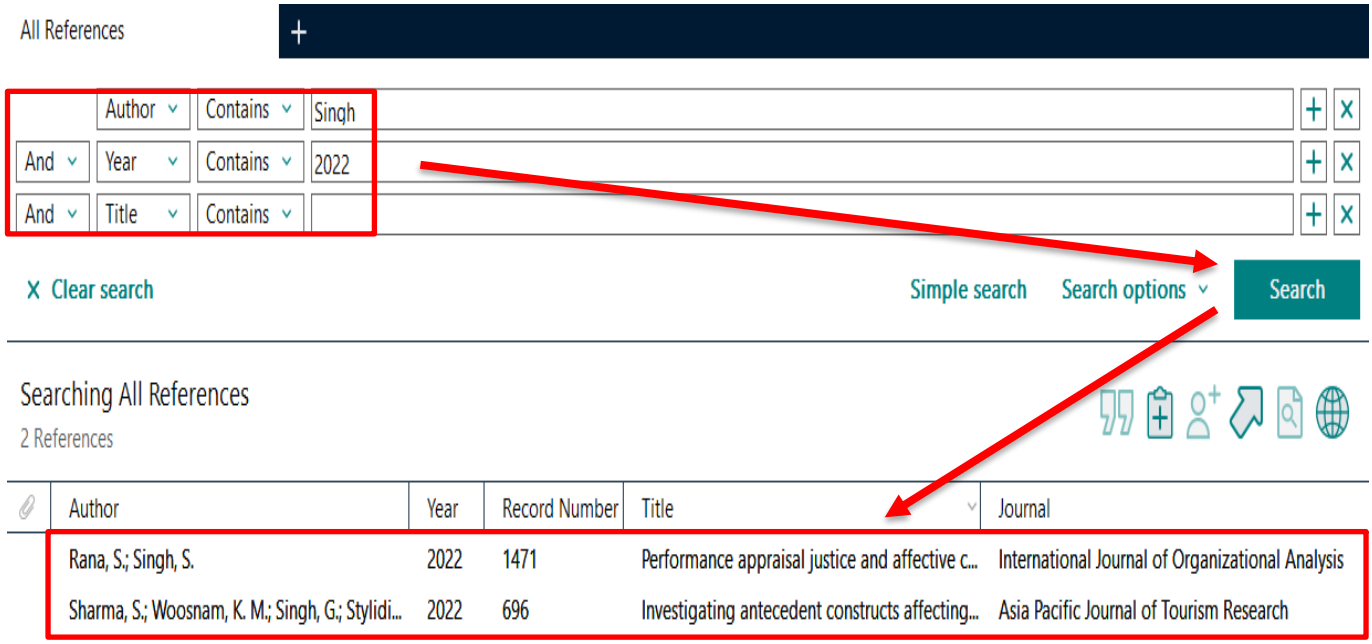
- Use the Advanced Search Feature to search for Author, Year, Keywords, Title etc within the references (Advanced Search is found under the Library menu).

Using the search field option



Search either using a single or a combination of criteria (refer to the screenshot below)

1. Type your search query and select your criteria, then click **Search.**
2. The search results will appear as per the chosen criteria.



6. **Customising the display window**

- You are able to sort your references by the column headings
- Click on any heading to sort by that field (choose either ascending order or descending order)

Selecting Fields to Display

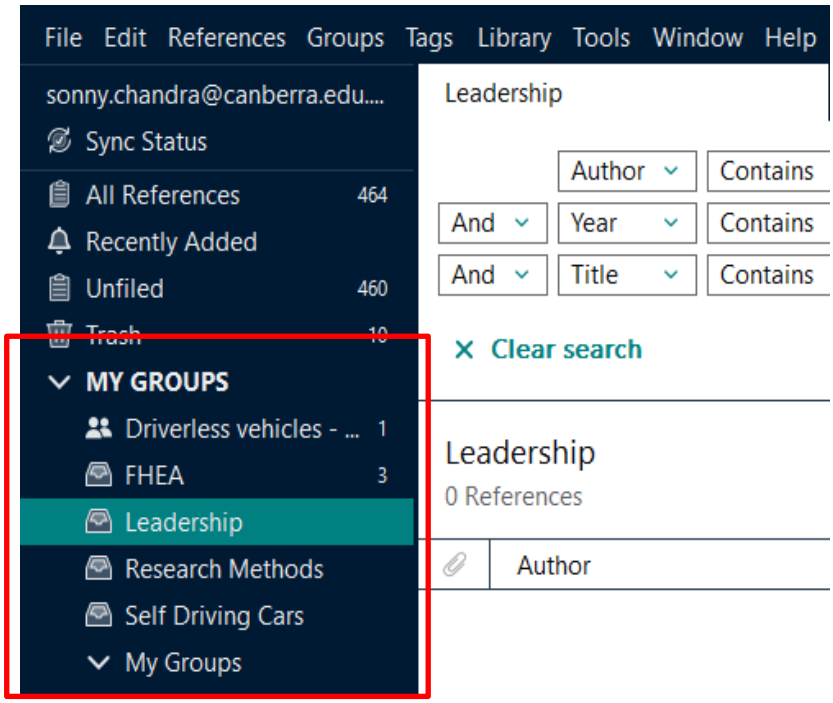
- To change the display of the fields, select from the toolbar **Edit > Preferences > Display fields**
- Change Heading column using Field column entries

7. Create Groups

Custom Group

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

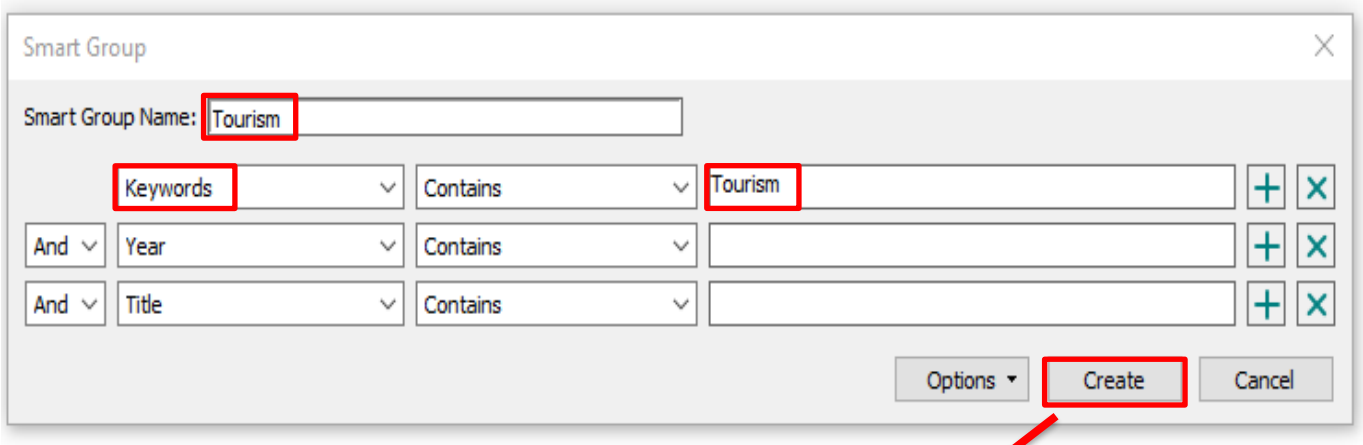
1. Right click on **MY GROUPS** and select **Create Group**
2. Name the new group box that opens (a meaningful topic / keyword etc.)
3. Select the reference(s)to be moved to the new group, then either:
    - ‘drag and drop’ into the new group box
    - right-click on a reference and select **Add References To** and select the group you wish to add a reference to
    - Click on **Groups** and select **Add References to > [Group name]**

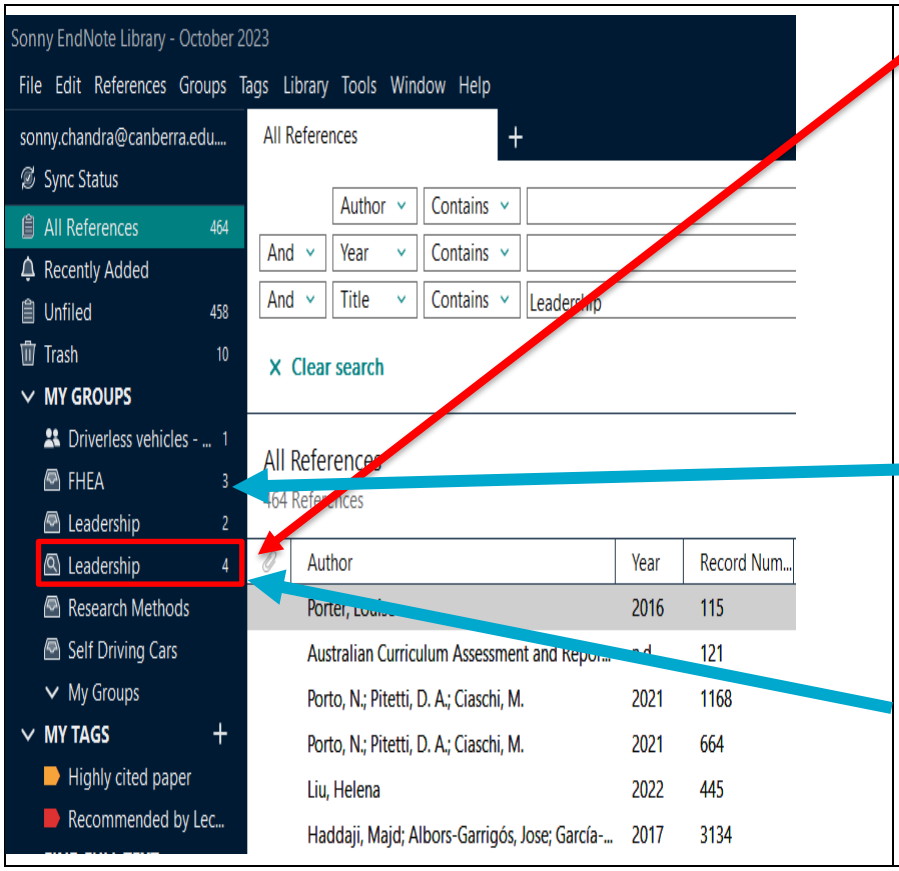


Smart Group

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

1. Right click on **MY GROUPS** and select **Create Smart Group**
2. Name the Smart Group Name box that opens
3. Select search criteria using the available fields and click **Create**
4. The references in your library that match your criteria will be automatically moved into your smart group





How to differentiate between Group and Smart Group icons:

Group icon

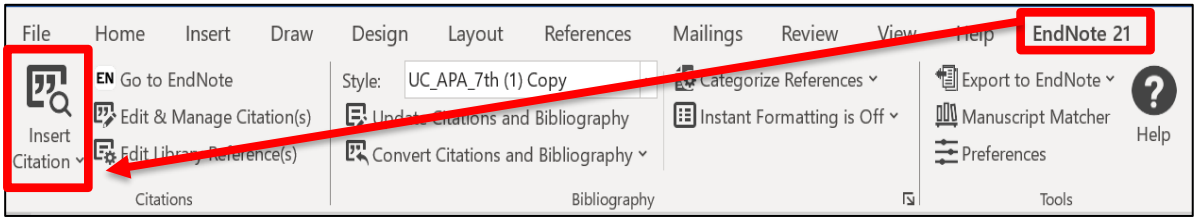
Smart Group icon

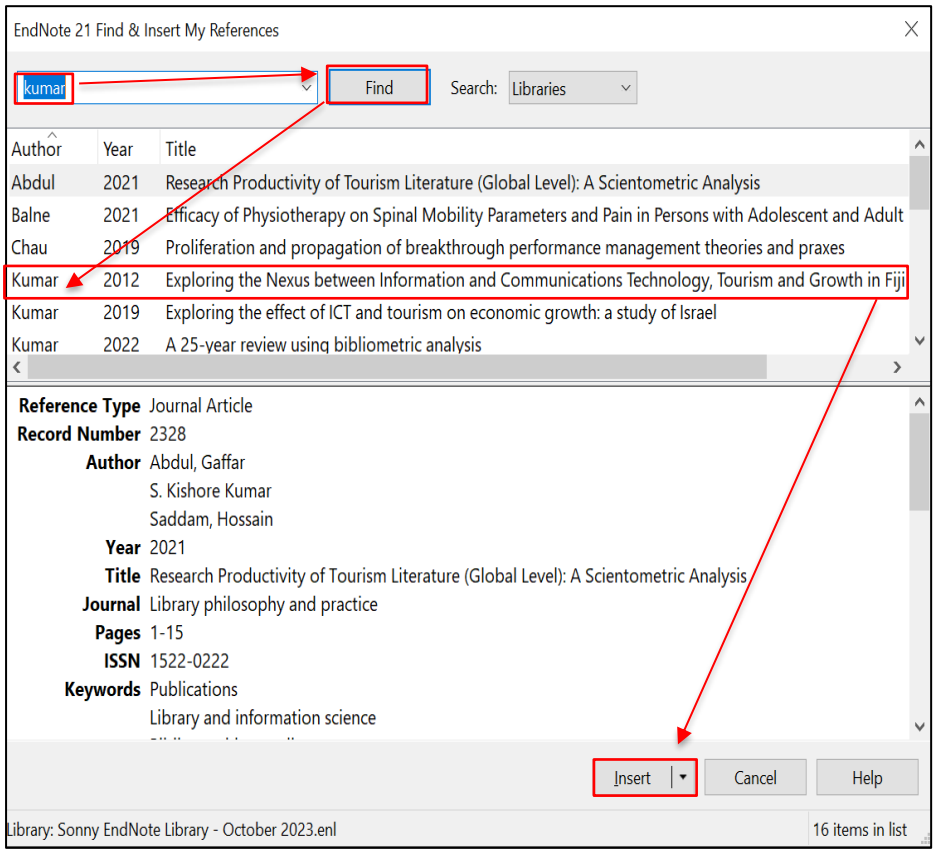
8. Using the Cite While You Write (CWYW) Word feature

Inserting a citation in a Word document

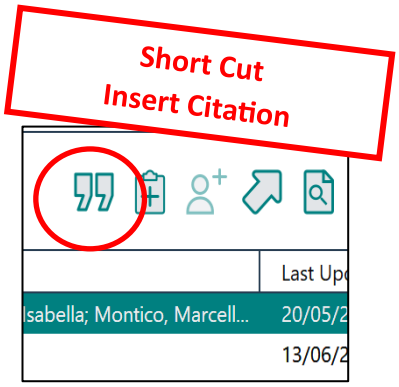
Method 1 – Inserting from within Word

1. Open a document in Microsoft Word.
2. Place the cursor in your document where you would like a citation to appear.
3. Click on the **EndNote 21** tab.
4. Click on '**Insert Citation**'.
5. Type the Author you wish to cite in the search box and click on the **Find** button.
6. Select the relevant record and click on the **Insert** button.



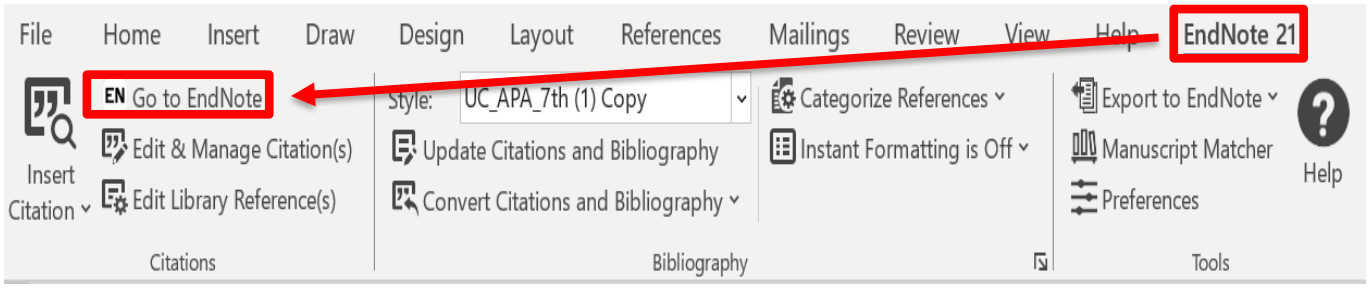


Method 2 – Inserting from Endnote Desktop

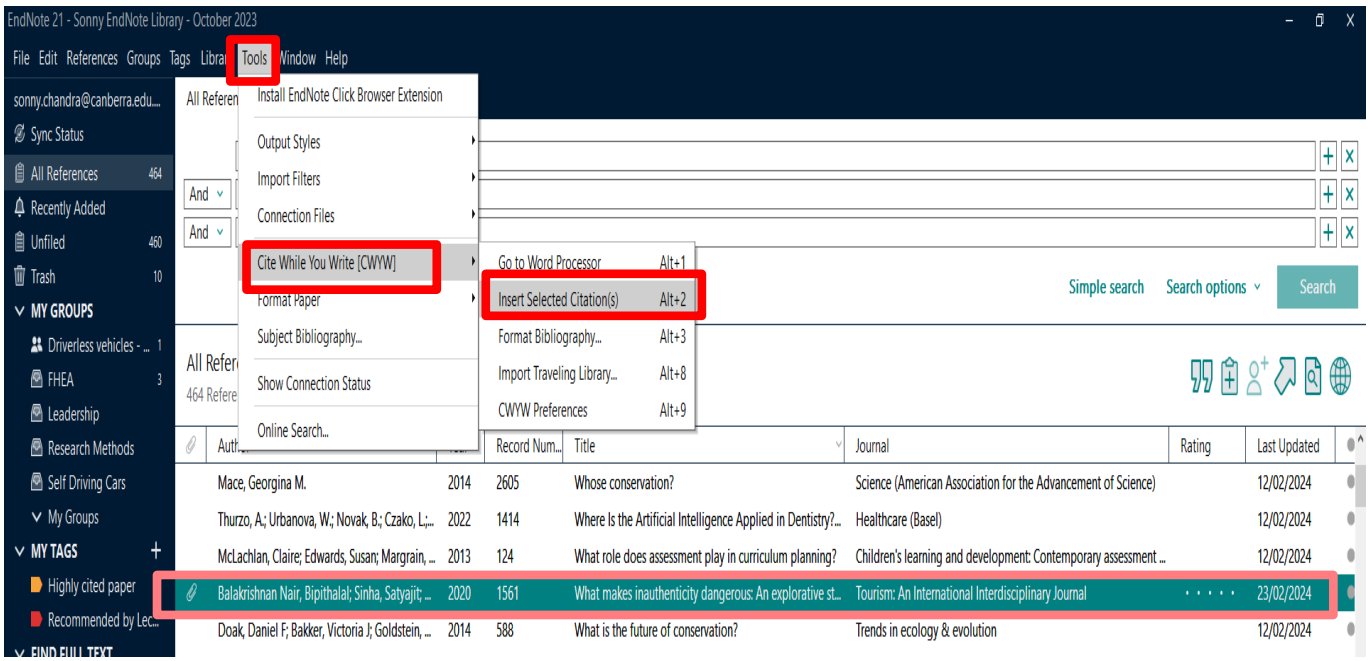


Citing a single reference

1. Open a document in Microsoft Word
2. Place the cursor in your document where you would
    a. like a citation to appear.
3. Click on the **EndNote 21** tab
4. Click on '**Go to EndNote**'.

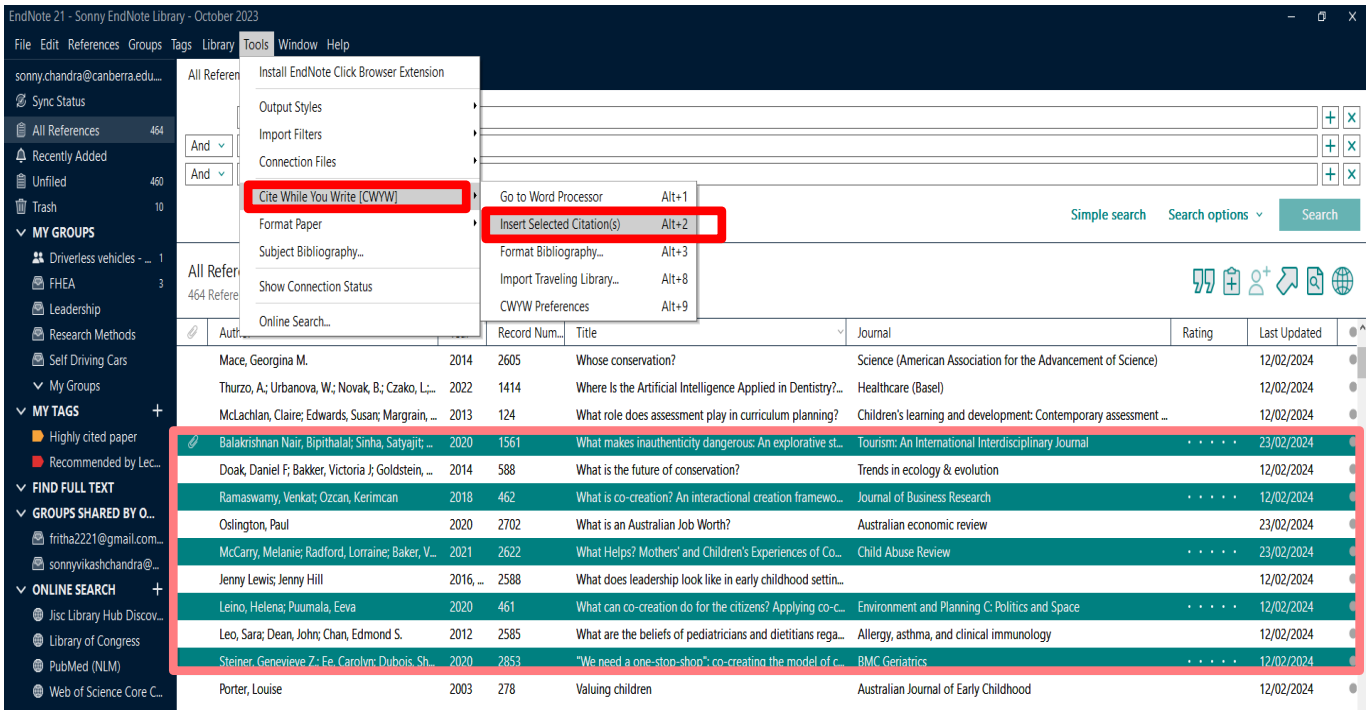


6. Select the reference you wish to cite.
7. Go to Tools, then choose Cite While You Write (CWYW), the select Insert Selected Citation(s)



Citing Multiple References

1. Click on **CNTRL** button (on the keyword) and select the references to cite.
2. Go to **Tools** tab, from the drop-down menu select '**Cite While You Write**'.
3. Select '**Insert Selected Citation(s)'.**

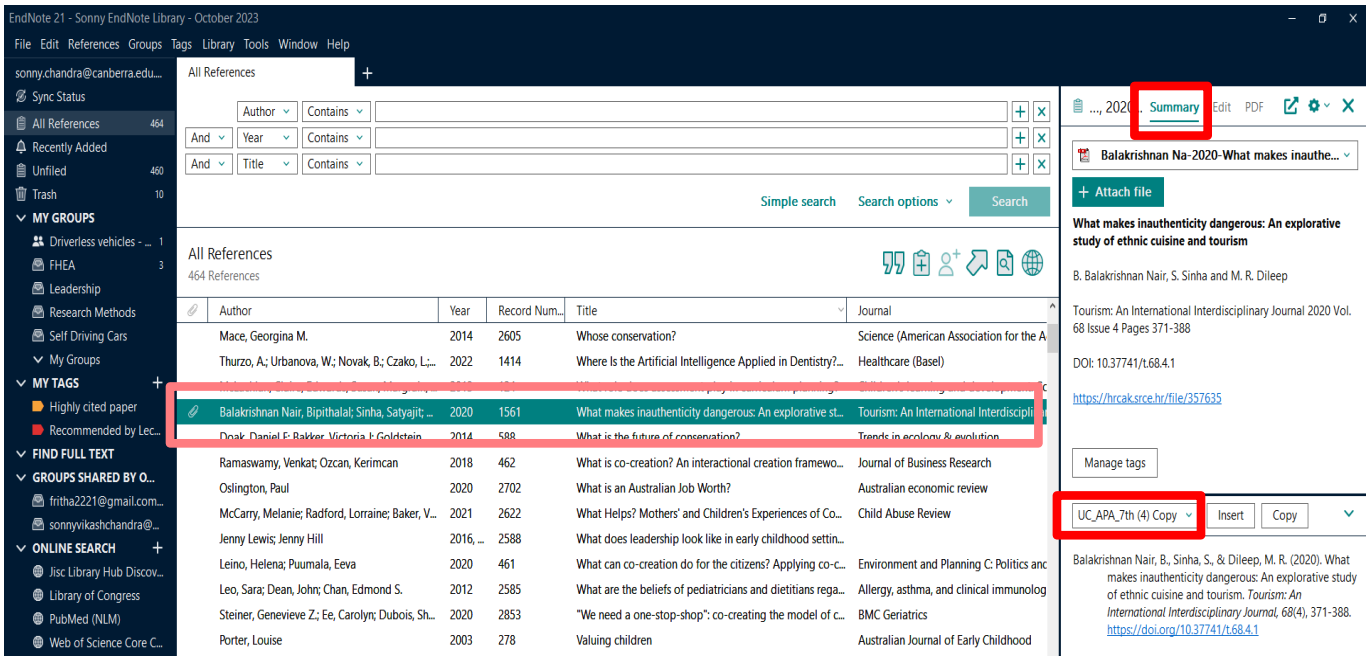


When an in-text citation is entered in the Microsoft Word document, EndNote automatically creates the corresponding reference at the end of the document.

9. Format your paper / Thesis

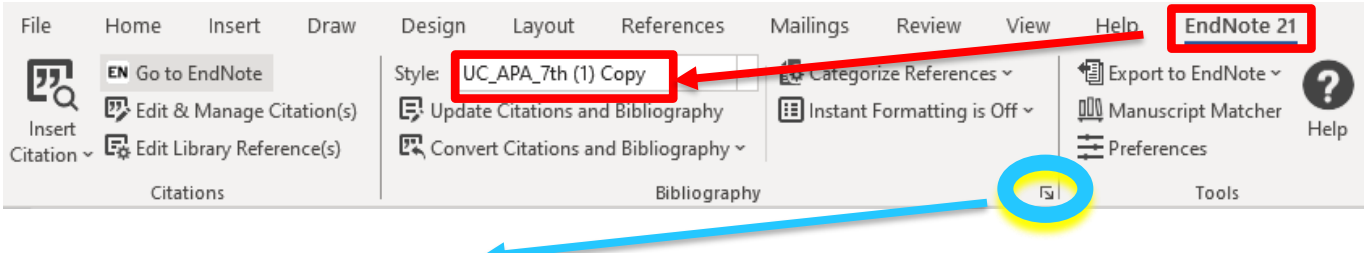
Referencing Style

In EndNote, use the style dropdown list to pick a style or choose **Select Another Style** to see a longer list of styles. UC updated styles are available for download at https://www.endnote.com/downloads/styles/



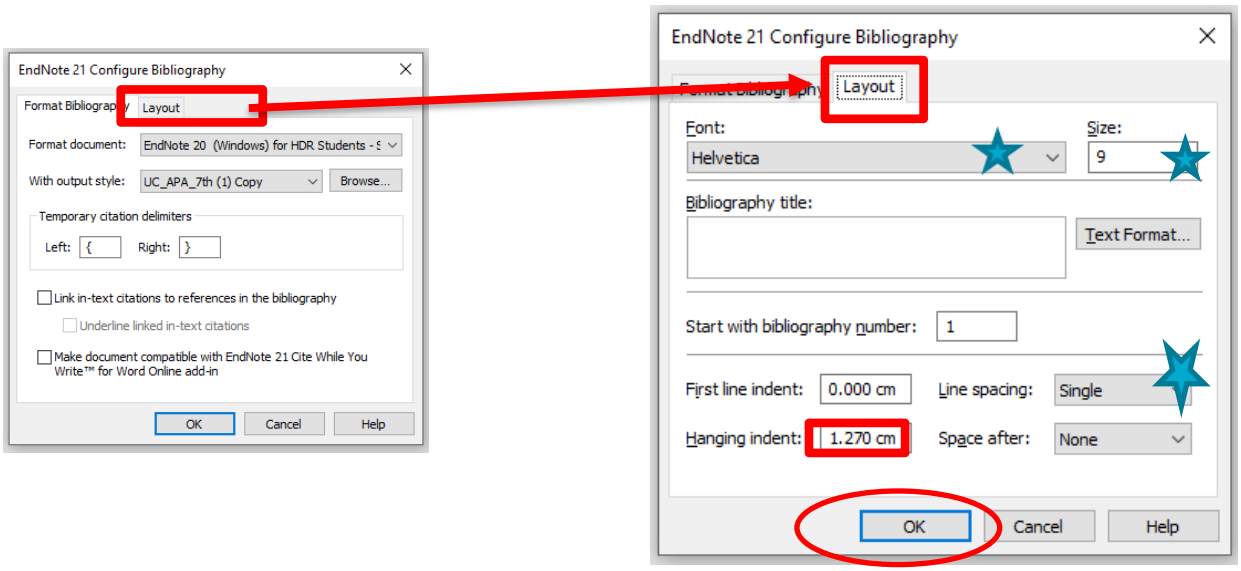
Format document Bibliography / Reference list

1. Check the referencing style showing in Word is the required one for this document.



Click on the **Configure Bibliography** arrow (indicated above using the blue circle) for options to format your bibliography further or change its layout.

2. Make the changes as per the thesis / unit outline / publisher requirements.



10. Edit In-Text Citations

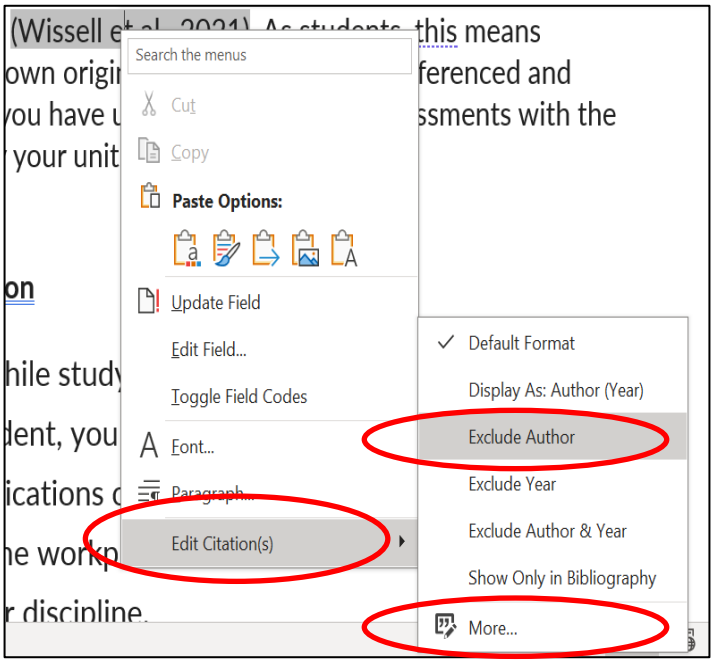
You may wish to modify citations to remove author or year from the citation bracket, add page numbers or add "see also".

There are 2 main methods of edit citations.

1. Highlight citation & Right click for drop down options.
2. Highlight citation & select "**Edit & Manage Citation(s)**" from the Endnote tab.

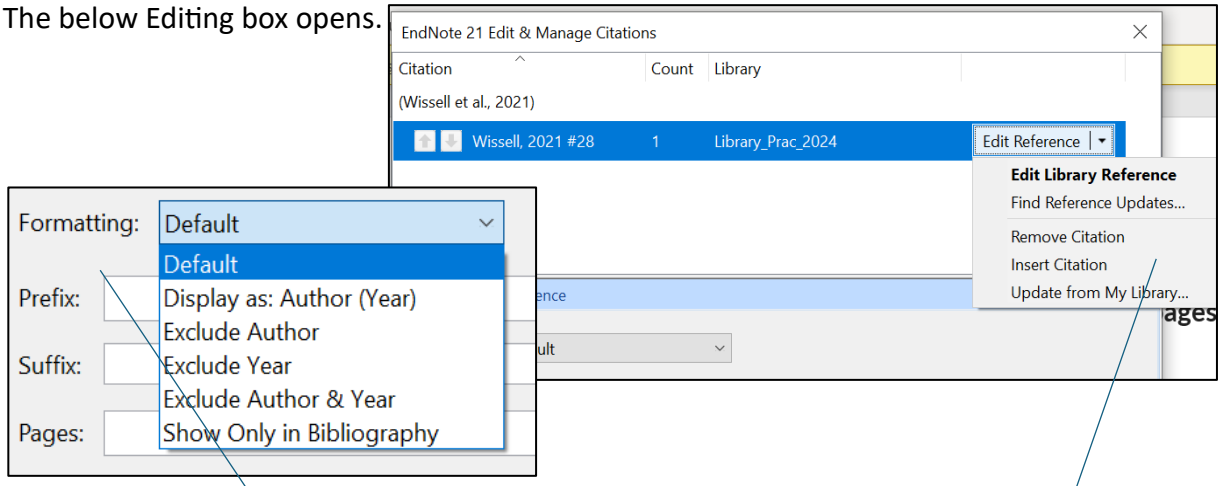
Method 1 – Edit citation using Right click.

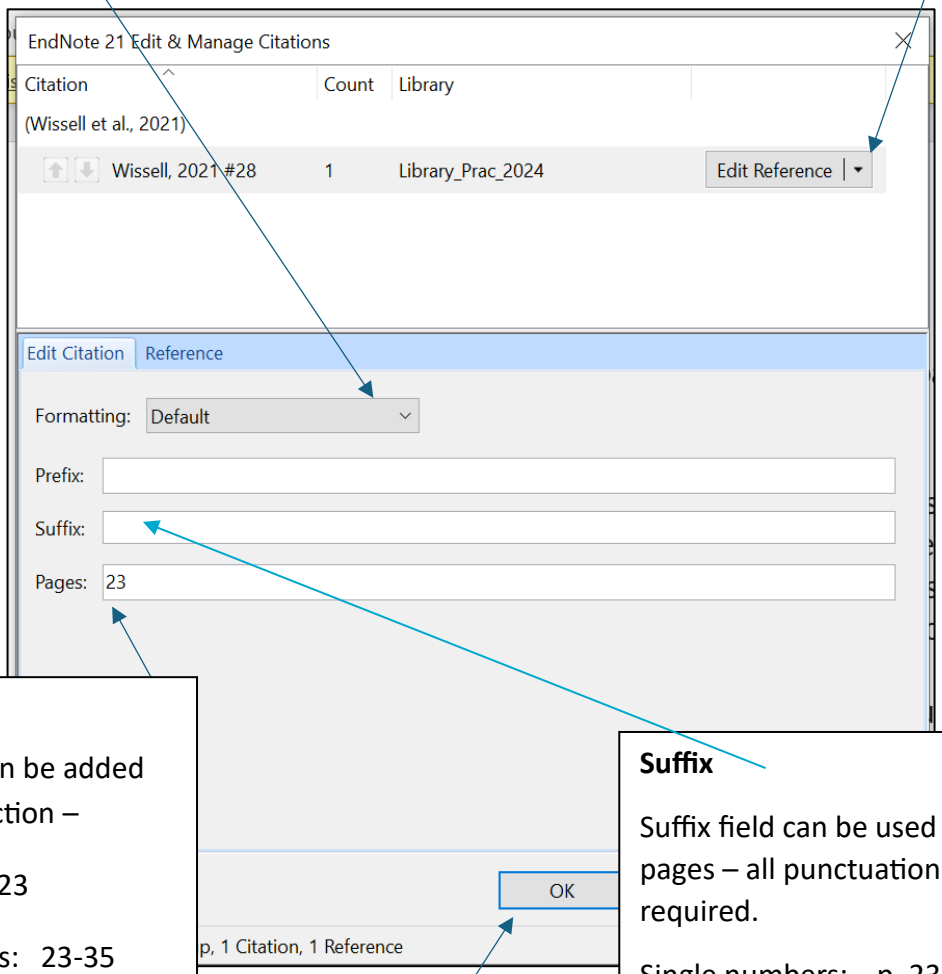
1. Highlight citation by clicking on it.
2. Right click & select "Edit Citation(s) from the drop-down menu.
3. Formatting options for Author & Year show.
4. Click on these options to select.
5. For adding pages or after other options – click on '**More**…' at the end of the format list.
6. The "**Edit & Manage Citations**" box will open.



Method 2 – Edit citation via the "Edit & Manage Citations" on the Endnote tab.

1. Highlight citation by clicking on it.
2. Frome the Endnote tab – select "Edit & Manage Citations".
3. The below Editing box opens.





Pages

Page numbers can be added to the 'Pages' section –

Single number: 23

Multiple numbers: 23-35

Suffix

Suffix field can be used for adding pages – all punctuation is required.

Single numbers: p. 23

Multiple numbers: pp. 64-66

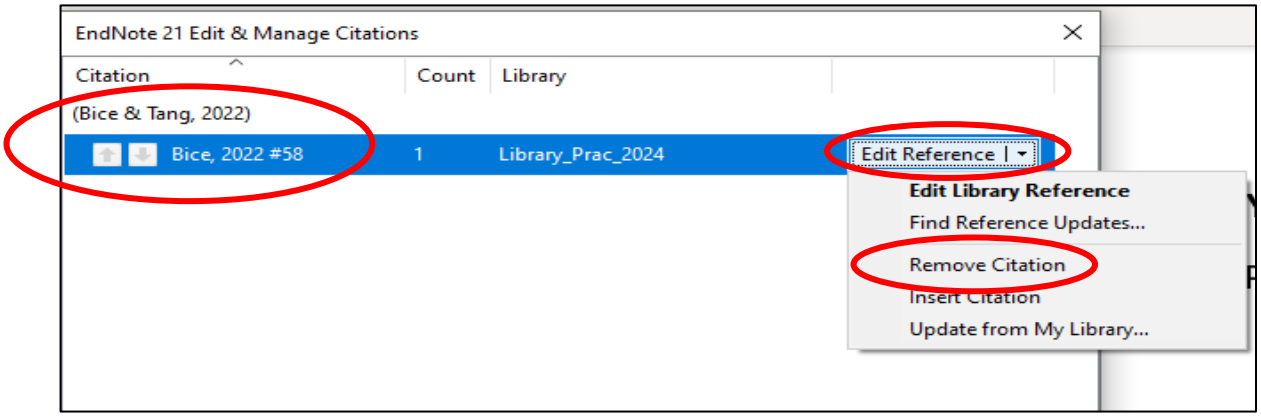
All editing complete – click **'OK'**

Delete citation from document.

If a citation in a document is no longer required – it needs to be removed via the 'Edit Citations' option. This will carefully remove the field codes that link the citation & reference to the document & Endnote library. If a citation is just 'deleted' by using the 'delete' button on computer – the Endnote field coding may become corrupted & there maybe issues with the document & citations.

1. Highlight the citation in the document.
2. From the Endnote tab select "Edit & Manage Citations".
3. **Edit & Manage Citations** box opens with
    a. highlighted citation showing.
4. Select the "**Edit Reference**" drop down arrow.
5. Select "**Remove citation**".
6. Select "**Okay**' at the bottom of edit box.
7. Citation will be safely removed from document.

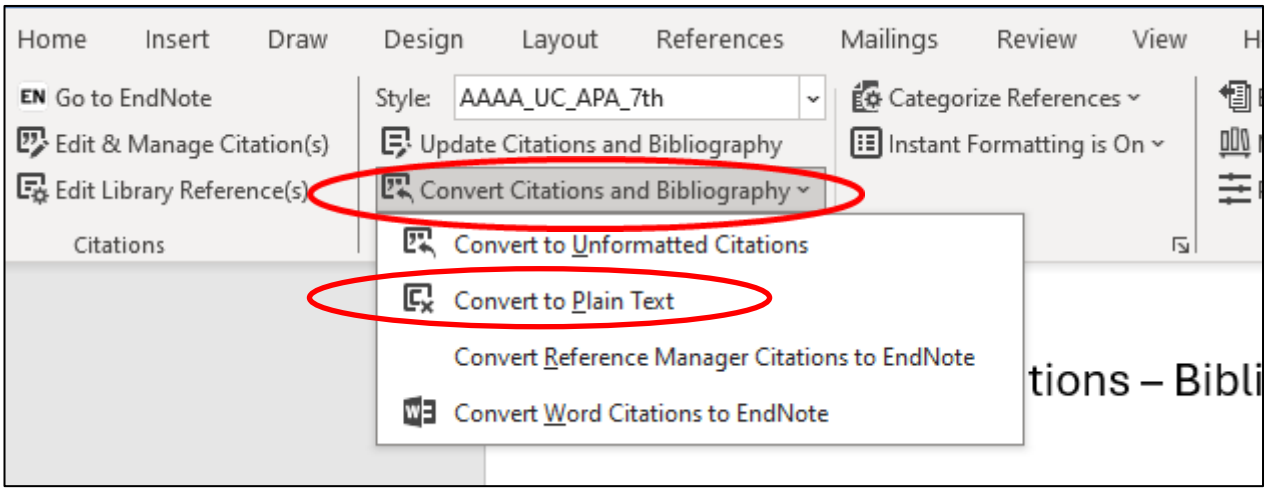
If this was the only citation from these authors used in this document, the reference will also be automatically removed from the reference list. If this was not the only time this citation has been used in the document – the reference will stay, linked to the previous citation/s for these authors.



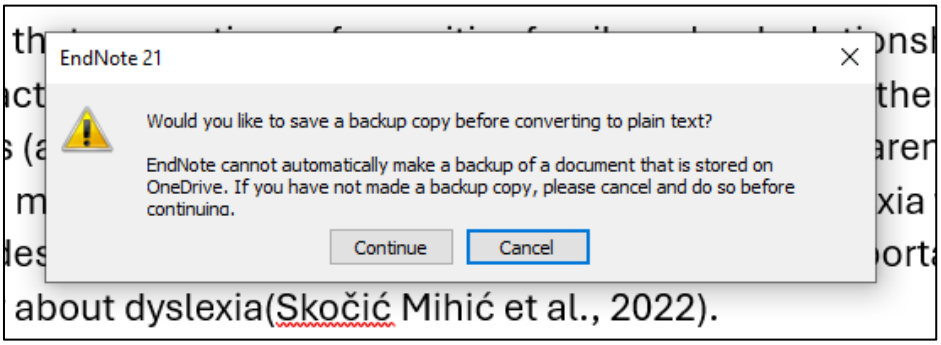
Converting document to plain text

Once the document has been converted to Plain Text / Endnote Field codes removed – this document cannot be converted back. Ensure you have a copy of the document with Endnote Field codes – before converting it to Plain text.

1. Make a Backup copy of your document – with the Endnote field codes.
2. From the Endnote tab – select 'Convert Citations and Bibliography'
3. Select – 'Convert to Plain Text'.
4. Reminder box pops up. Ensure you have a backup copy of your document with Endnote field codes. If you already have a backup copy with Endnote field codes – click 'Continue'.
5. Document now is free from any Endnote field codes.
6. Save document now in Plain Text / no field codes.



Only select 'Continue' if you have already made a backup copy of the document with Endnote Field codes.



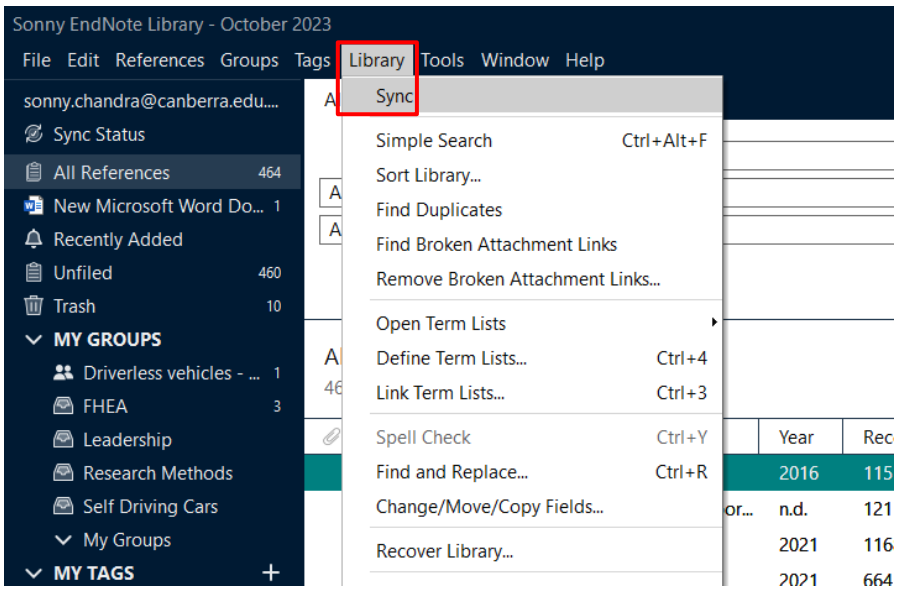
Mac users

Tools (tab) – Convert to Plain Text

11. SYNCHRONISING AND SHARING ENDNOTE

Syncing the Endnote Library

The sync button is located the **Library** menu



This is an ideal way to backup the EndNote Desktop with the EndNote Online.

Collaboration: using EndNote Desktop & EndNote Online

There are several options for sharing access to

1. EndNote desktop
2. EndNote online

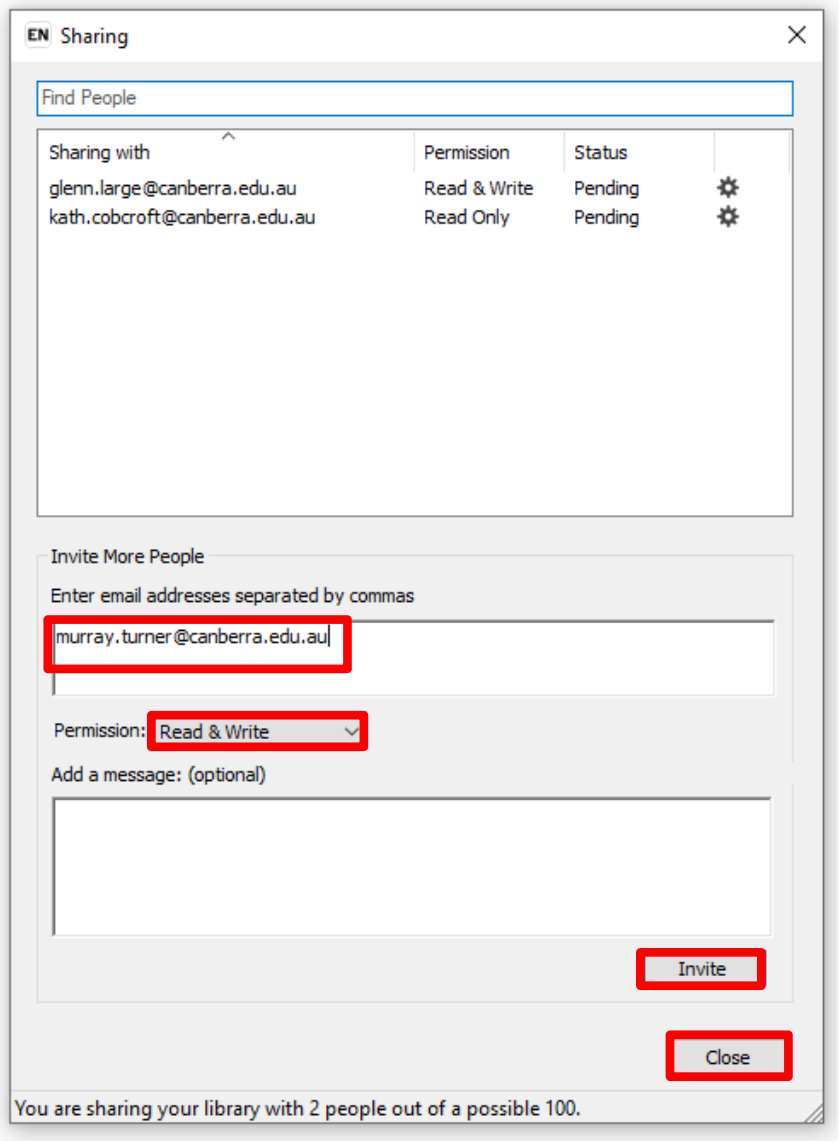
Sharing EndNote desktop via Share Library

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. Sharing the Desktop library also includes sharing the attachments. If sharing the Endnote Online library – only the references will be shared – not the attachments.

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**
3. In the Sharing dialogue box, enter the email addresses of your collaborators' accounts
4. Choose either Read & Write access or Read Only access
5. Click **Invite**
6. Click **Close**



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**

Sharing group using Endnote Online

* Sharing an Endnote online library differs from sharing a desktop library. When sharing an Endnote Online library – only the references are shared – not the attachments.

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

Shared Library sample

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**

12. Additional assistance

QR Code	**Link**
	UC EndNote Library Guide *https://canberra.libguides.com/endnote*
	Book a research consultation One-on-One hour-long appointment with a research Librarian.
	EndNote Website Technical support
	IT & Cyber Security Technical support
	EndNote FAQ's

Version: June 2025

References

Clarivate. (June 2025). *EndNote: EndNote 21*. https://proquest.libguides.com/endnote