

Swinburne University of Technology



Basics for Windows

Swinburne Library EndNote resources page:

<https://www.swinburne.edu.my/library/referencing/endnote-2.php>

These notes include screenshots from the EndNote and Web of Knowledge software and excerpts from help screens. Copied with permission from Thomson Reuters.

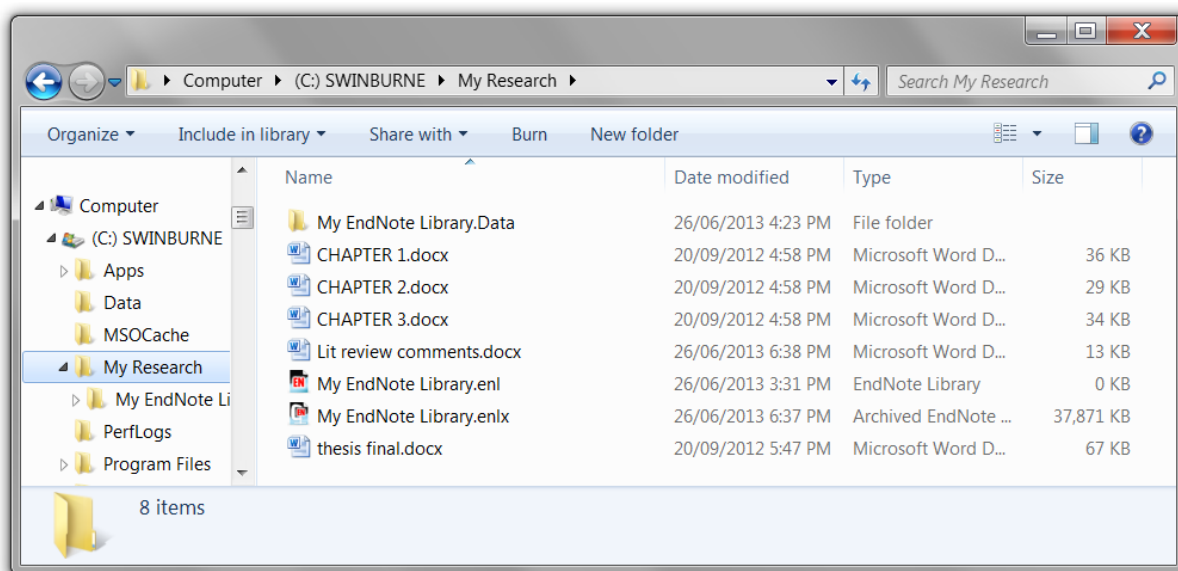
Checklist for using EndNote on your own computer	3
Getting Started.....	4
Adding references to your database.....	5
Exporting references from Bibliographic Databases: an example	5
Exporting references from the Swinburne search page: an exercise	6
Looking at your library	8
Using the Reference Quick Edit panel	9
Adding some keywords	10
Changing capitalization in the title field.....	10
Finding full text for a reference	11
Manually adding full text articles and other attachments.....	11
Importing PDFs from your files	13
Opening attached PDFs	14
Searching your library.....	15
Managing your references: Creating groups.....	15
Setting up EndNote sync for auto backup	16
Syncing to a new EndNote online account.....	16
Syncing to an existing EndNote online account	17
Syncing an existing account to a second computer (Mac or Windows).....	17
When should I use Cite While You Write?.....	18
I'm ready to use Cite While You Write. Now what?	19
What are output styles?	19
Activating a style within EndNote.....	19
What if the style is not included in EndNote?.....	20
How do I know which data fields a style uses?	21
Changing a style within Word 2016	22
Using CWYW with Word: an exercise	23
Changing a reference's appearance:.....	25
Adding text and pagination	26
Safely copying text and references between documents	26
Safely deleting references	27
Cite While You Write: an exercise	28
Where can I get help with EndNote?	29

Checklist for using EndNote on your own computer

1. Create a Research folder at the top of your hard drive – usually the C: drive.

Do not store active EndNote files on syncing (OneDrive, Dropbox) or networked drives (H: or G: drives) as this will eventually corrupt and crash the library.

1. Create a folder at the top of your hard drive for your personal EndNote library and Word documents.
2. Create your new EndNote library and save it to this folder.



2. Save your Word documents to the Research folder.

- EndNote creates links to Word documents. If you move the file, the links may be broken between EndNote and Word and strange things may happen to your bibliography and in-text references.
- Having all of your Word documents in the same place also makes it very easy to back everything up.
- Write your chapters in separate Word files. Large files slow down Word performance. We can help you combine them later.

3. Regularly back up your library and Word documents

Regularly copy your research folder to another portable storage device such as a backup drive. This backs up your Word files as well.

4. Sync for automatic backups with EndNote online (EndNote Web)

EndNote Sync enables you to access your research on the Web and on other computers with EndNote X9. If you use more than one computer, or use a Mac and Windows at different locations, this is an ideal way to make sure each computer's library is kept current.

Sync can automatically backup your EndNote references and attachments, but not your Word documents.

5. Sync between Windows and Mac

If you use Windows computers on campus and a Mac at home, use EndNote Sync to share your library easily between the two computers and platforms.

Getting Started

1. Click on the Windows **Start** button.
2. Click on **All Programs**.
3. Click the **EndNote** folder.
4. Choose **EndNote Program**.
5. You may be presented with the **Welcome to EndNote screen**. Close the Welcome screen
6. Click File > New to create a new library.
7. EndNote presents a window prompting you to name and save the new library. We encourage you to create a folder on the C: drive for your research. Click the new folder to select it.
8. Change the save name if required. The default is: My EndNote Library.enl
9. The extension “.enl” stands for “EndNote Library”. EndNote will add “.enl” automatically.
10. Click **Save**.
11. The new library appears as an empty EndNote library.

Adding references to your database

We recommend the Firefox or Chrome browsers for searching our databases and transferring records to EndNote X9.

You can search **Swinburne Sarawak library** databases and then export the search results to EndNote. You will need to sign in **using your library Angka.sa2 account**. Typically, Swinburne Sarawak Library databases will have an option to “mark” or “add” records of interest, and then you can look at the marked items and find an export option.

You may need to do some editing after the export.

Exporting references from Bibliographic Databases: an example

1. Make sure that you have your EndNote library open.
2. Go to the Library homepage <http://www.swinburne.edu.my/library>
3. A link for **Science Direct** appears under the Library search box. Click the **Science Direct** link.
4. Login with your library Angka.sa2 account
5. Type the words: **rainfall and "stormwater runoff"** in the search window.
6. Click **Search**.
7. You will get a list of all relevant articles. To mark articles of interest:
 - a. For one useful reference, you can click on the selection box. Then click the Export dropdown arrow and click Export citation to RIS link.
8. Click the file at the bottom left corner.

The screenshot shows the ScienceDirect search results page. The search query is "rainfall and stormwater runoff". The results are sorted by relevance. A red box highlights the selection box for a research article. Another red box highlights the "Export citation to RIS" option in the export dropdown menu. A text box with an arrow points to the selection box with the text "Click to add a single record".

9. . This should then prompt the transfer window, or open the file directly in EndNote.

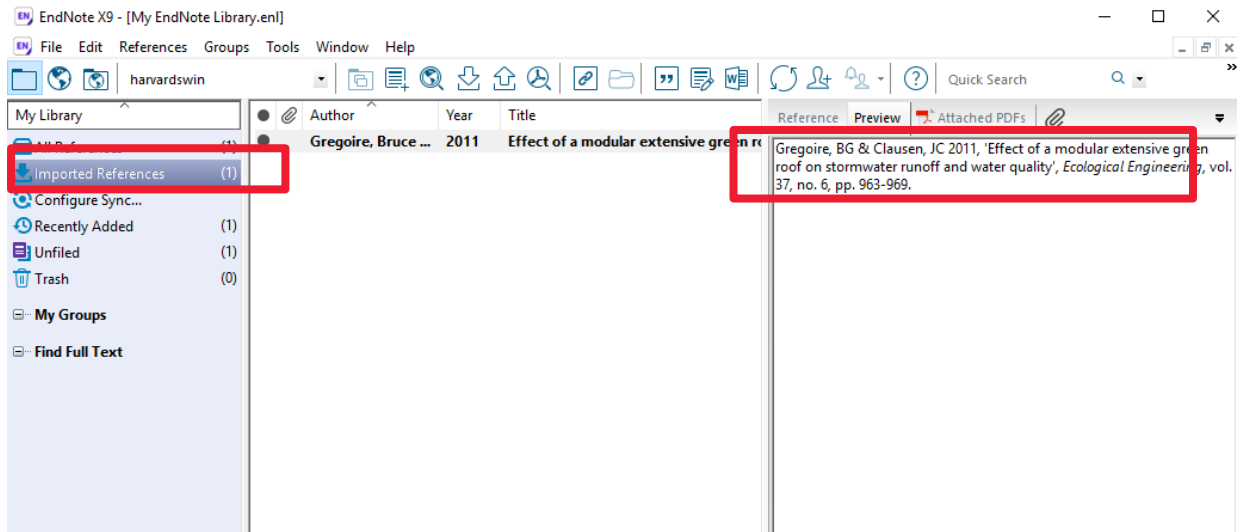
10. EndNote X9 should transfer the records directly to your current library. If it doesn't, use the Look in: dropdown menu to find and click on your library file.
11. The references will be transferred to your library as an **Imported references** group. Note that exported references do not include full text.

Exporting references from the Swinburne search page: an exercise

1. Make sure that you have your EndNote library open.
2. Go to the Library homepage: <https://www.swinburne.edu.my/library>
3. Type your search terms in the search window.
4. Hit **Enter**.
5. Go to the title you are interested in.

The screenshot shows a search results page for 'rainfall and stormwater runoff' on the Swinburne University library website. The search results are sorted by relevance, showing 9,040 results. The first result is 'Effect of a modular extensive green roof on stormwater runoff and water quality' by Gregoire, Bruce G; Clausen, John C. A dropdown menu is open over the first result, showing options: Read Online, Export to, RefWorks, EasyBib, EndNote (highlighted with a red box), Zotero, BibTeX, and Citavi. A red box on the right side of the image points to the 'More actions' (three dots) icon in the dropdown menu, with the text 'Click this more action to add a single record'. At the bottom left of the page, a file named 'export-endnote-15...ris' is highlighted with a red box.

6. Click **More actions** '...' dropdown.
7. Click **Endnote**.
8. Go to the **export-endnote-15...ris** at the bottom left of the window.
9. Double Click at the file to open in Endnote application. (To do this, please open Endnote Library application in advance)
10. The records will be transferred to EndNote.
11. EndNote X8 should transfer the records directly to your current library. If it doesn't, use the Look in: dropdown menu to find and click on your library file.
12. The references will be transferred to your library as an **Imported references** group.



Looking at your library

When you have transferred your records, you see the **Library window**. The newly imported references are displayed in the summary screen.

The screenshot shows the EndNote X9 interface with several red boxes and arrows pointing to specific features:

- Current Styles drop down menu**: Points to the 'My Library' sidebar.
- Find the full text**: Points to the search bar.
- Sync auto-backup**: Points to the 'Options' menu.
- Quick search**: Points to the search bar.
- Advanced search panel**: Points to the search filters (Match Case, Match Words).
- Reference quick edit, Preview and Attached PDF viewing panels**: Points to the right-hand pane.
- Change your screen layout**: Points to the 'Layout' button at the bottom right.
- Rate your research**: Points to the 'Rating' column in the table.
- Library summary screen - each line represents a record in your Library**: Points to the main table of references.
- Groups pane**: Points to the 'My Groups' section in the sidebar.

Author	Year	Title	Rating	Journal	Last Updated	Reference Type
Ahmed, Warish; ...	2019	A review on microbial contaminants in stormw...		Science of The ...	7/10/2019	Journal Article
Ahmed, Warish; ...	2018	Novel crAssphage marker genes ascertain sew...		Water Research	7/10/2019	Journal Article
Birch, Heidi; May...	2012	Partitioning of fluoranthene between free and...		Water Research	7/10/2019	Journal Article
Bloorchian, Azad...	2016	Modeling BMP and Vegetative Cover Perform...		Procedia Engin...	7/10/2019	Journal Article
Cha, Sung Min; L...	2016	Determination of best management timing of...		Ecological Engi...	7/10/2019	Journal Article
Chen, Jieyun; Ad...	2007	Development of analytical models for estimat...		Journal of Hydr...	7/10/2019	Journal Article
Chow, Michelle L...	2019	An urban stormwater runoff mortality syndr...		Atmospheric Toxi...	7/10/2019	Journal Article
Ercolani, Giulia; C...	2018	Evaluating performances of green roofs for st...		Journal of Hydr...	7/10/2019	Journal Article
Fulazzaky, Moha...	2013	Sediment traps from synthetic construction sit...		Journal of Hydr...	7/10/2019	Journal Article
Goldyn, Ryszard; ...	2018	Influence of stormwater runoff on macroinve...		Science of The ...	7/10/2019	Journal Article
Gregoire, Bruce ...	2011	Effect of a modular extensive green roof on st...		Ecological Engi...	7/10/2019	Journal Article
Hathaway, J. M.; ...	2016	Temperature dynamics of stormwater runoff i...		Science of The ...	7/10/2019	Journal Article
He, Jianxun; Vale...	2011	Prediction of event-based stormwater runoff ...		Journal of Hydr...	7/10/2019	Journal Article
He, Li-Ming; He, ...	2008	Water quality prediction of marine recreatio...		Water Research	7/10/2019	Journal Article
Holt, Benjamin; ...	2017	Stormwater runoff plumes in the Southern Cal...		Marine Pollutio...	7/10/2019	Journal Article
Huang, Jinliang; ...	2010	Uncertainties in stormwater runoff data colle...		Journal of Envi...	7/10/2019	Journal Article
Hwang, Vincent; ...	2017	Fly ash-amended permeable pavement for su...		Journal Article		Journal Article
Jurczak, Tomasz; ...	2018	Hybrid system for the treatment of stormwa...		Journal Article		Journal Article
Kayhanian, Maso...	2019	Application of permeable pavement for storm...		Journal Article		Journal Article
Ki, Seo Jin; Kang...	2011	Advancing assessment of stormwater runoff...		Journal Article		Journal Article
Kim, Geonha; Yu...	2007	Diffuse pollution loading from urban stormwat...		Journal of Envi...	7/10/2019	Journal Article
Ko, Dongah; Min...	2018	Disulfide polymer grafted porous carbon comp...		Chemical Engin...	7/10/2019	Journal Article
Liu, Wen; Chen, ...	2015	Influences of setting sizes and combination of ...		Ecological Mod...	7/10/2019	Journal Article
Liu, Wen; Feng, ...	2019	The influence of structural factors on stormwa...		Journal of Hydr...	7/10/2019	Journal Article
Liu, Wen; Wei, ...	2019	The impacts of substrate and vegetation on st...		Journal of Hydr...	7/10/2019	Journal Article
McIntyre, Jenife...	2018	Interspecies variation in the susceptibility of a...		Environmental ...	7/10/2019	Journal Article
Parikh, Punam; T...	2005	Application of market mechanisms and incenti...		Environmental ...	7/10/2019	Journal Article
Paule-Mercado, ...	2017	Influence of land development on stormwater...		Science of The ...	7/10/2019	Journal Article
Paule-Mercado, ...	2018	Monitoring and quantification of stormwater r...		Ecological Indic...	7/10/2019	Journal Article
Perera, Thamali; ...	2019	Taxonomy of influential factors for predicting ...		Water Research	7/10/2019	Journal Article
Saraswat, Chitre...	2016	Assessment of stormwater runoff managemen...		Environmental ...	7/10/2019	Journal Article
Schroll, Erin; La...	2011	The role of vegetation in regulating stormwat...		Ecological Engi...	7/10/2019	Journal Article
Shang, Hong; Su...	2019	PAHs (naphthalene) removal from stormwater...		Construction a...	7/10/2019	Journal Article
Tran, Ngoc Han; ...	2019	Emerging contaminants in wastewater, storm...		Science of The ...	7/10/2019	Journal Article
Voisin, Jérémy; C...	2018	Aquifer recharge with stormwater runoff in ur...		Science of The ...	7/10/2019	Journal Article
Vu, Chi Thanh; W...	2019	Engineered multifunctional sand for enhanced ...		Chemosphere	7/10/2019	Journal Article
Wang, Jianlong; ...	2015	Adsorption characteristics of construction was...		Chinese Journa...	7/10/2019	Journal Article
Wang, Jianlong; ...	2016	Cadmium removal from urban stormwater run...		Journal of Cont...	7/10/2019	Journal Article
Wang, Jianlong; ...	2018	Adsorption characteristics of a novel ceramsit...		Chinese Journa...	7/10/2019	Journal Article
Wang, Shumin; ...	2013	Pollutant concentrations and pollution loads in ...		Journal of Envi...	7/10/2019	Journal Article
Wang, Shumin; L...	2017	Nitrogen removal from urban stormwater run...		Ecological Engi...	7/10/2019	Journal Article

- The **File** dropdown menu:
 - Open, close, save and create EndNote libraries.
 - Import individual pdfs or folders of pdfs and EndNote will attempt to find the bibliographic data for you.
- The **Edit** menu:
 - Edit the output styles that format the display of references.
 - The Preferences option allows you to configure the software to your needs.
- The **References** menu:
 - Create, edit and delete references
 - Find duplicates
 - Find full text from a limited set of resources.
 - You can also work with URLs (online files) and file attachments (PDFs)
- The **Groups** menu:
 - Create, rename, edit and delete groups, which are a method of sorting your references.

You may need to make some changes to newly transferred references. You can edit references in two ways:

1. Use the reference quick edit tab at the right of your screen.
2. Double click to open the reference in a new screen. Edit it and then **Control-W** to close the screen and save the changes.

Using the Reference Quick Edit panel

Sometimes references do not export smoothly from a database. You can make changes in the **Reference Quick Edit** window.

An example would be a newspaper article from EBSCOhost. Those articles export as a Generic Reference type instead of a Newspaper article. It won't look right in the preview panel or your bibliography until you correct it.

1. Click the **Reference** quick edit tab.
2. Click the **Reference type** dropdown menu, which may currently show "Generic".
3. Select **Newspaper Article**
4. You need to move the newspaper title and other details to the correct fields. Check the **Notes** field for missing information.
5. Click a different article in the summary screen.
6. You will be prompted to save the change. Click **Yes**.

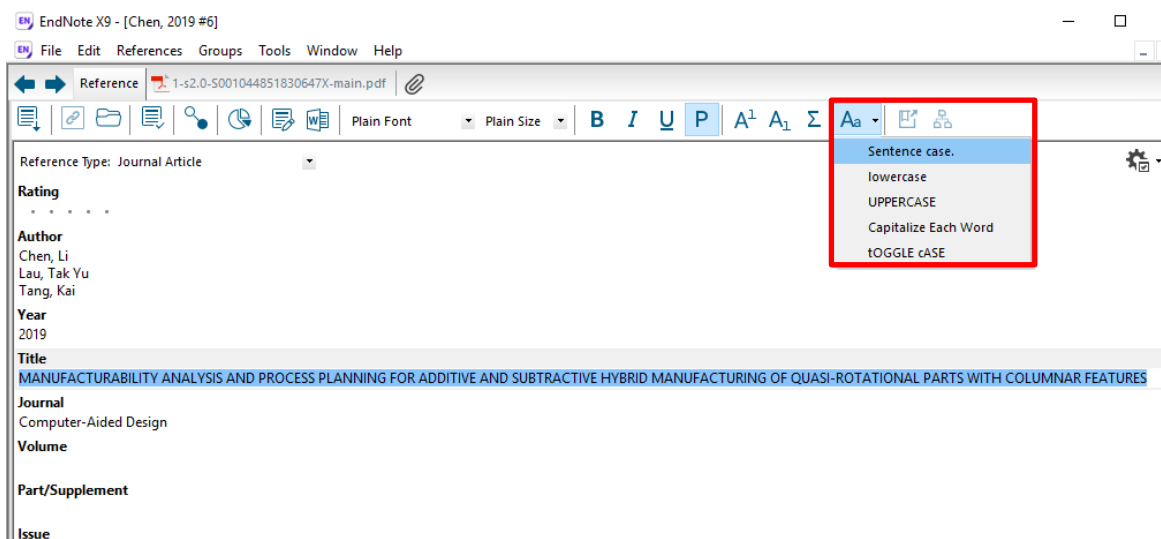
Adding some keywords

EndNote's basic search function lets you search in all fields, including PDFs. However, we recommend you add some descriptive words to the **Keywords** field to remind yourself of the important topics discussed in the article.

- If you can't see the **Keywords** field, click **Show Empty Fields** at the top of the **Reference Quick Edit** panel. You may have to click the **Options** icon first.
- Put them on separate lines so that EndNote will recognise each separate keyword.
- EndNote gathers a keyword term list and will autosuggest words from the list if you start to type in a similar word. Type over an autosuggestion if you need to use a new keyword.
- Using the same keywords in articles on the same topics will make it easy for you to use the Quick Search function to find similar articles.

Changing capitalization in the title field

1. This is the only change where you need to double click to open the reference in a new screen.
2. Highlight the text.
3. Click the **Change case** button.
4. Select your preferred option.



Note: in the current release, you need to add a couple of spaces at the end and delete them to have EndNote recognize that the content has been changed.

5. Close the window and save the changes by using **Control-W**.

Finding full text for a reference

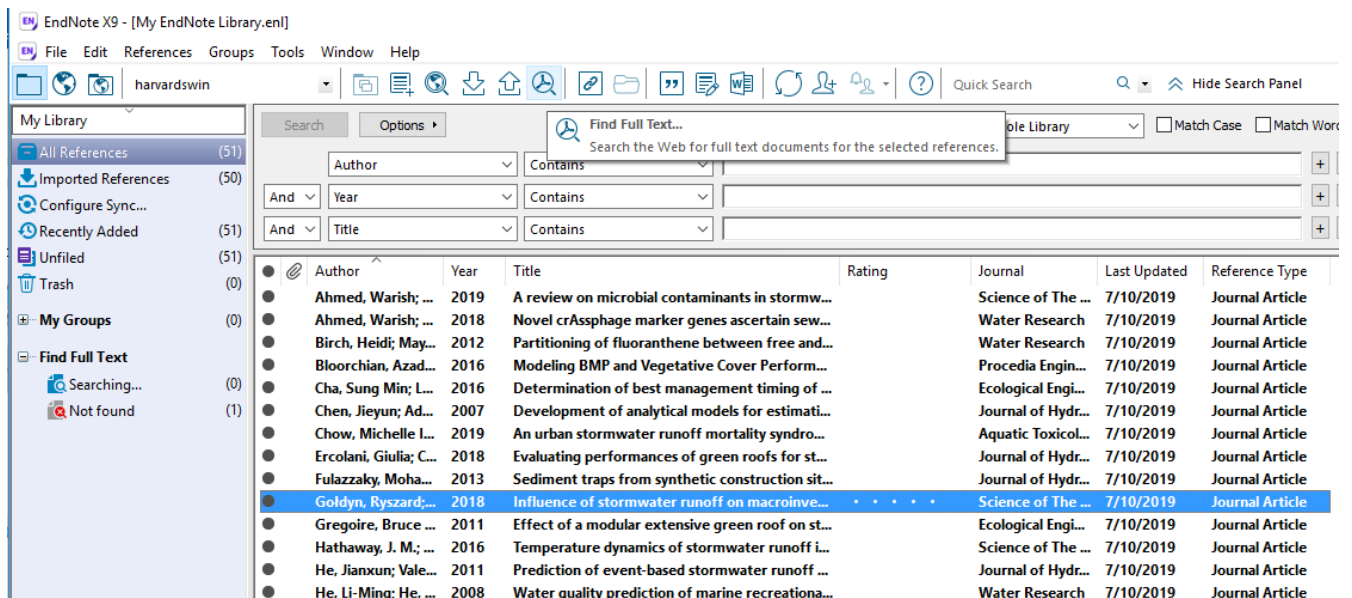
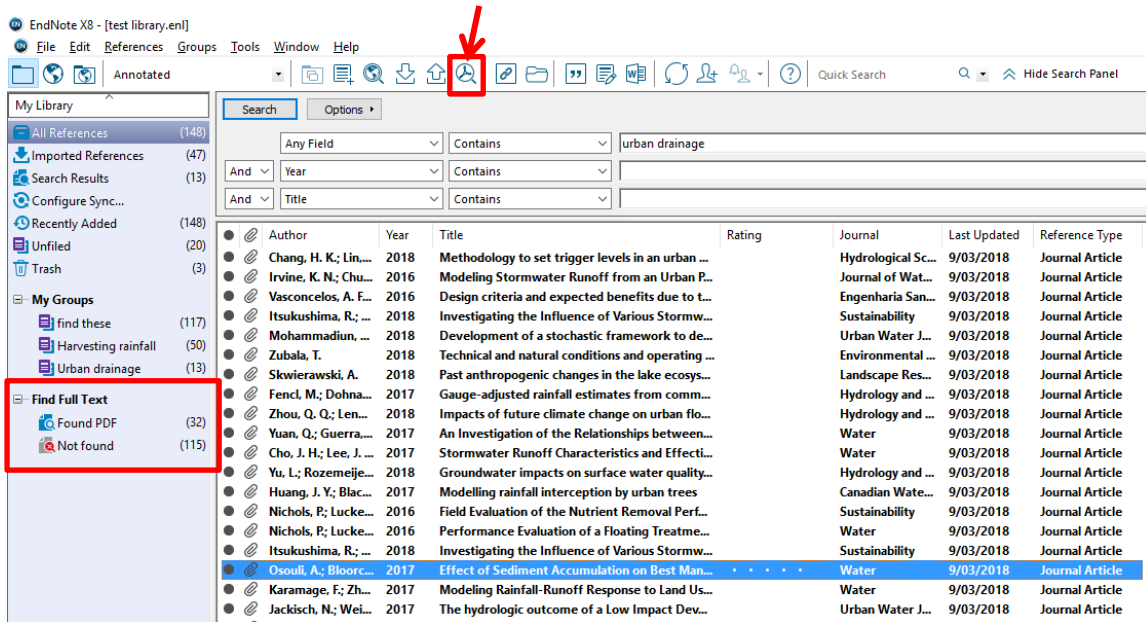
EndNote can attempt to locate full text files from these sources on the Web:

- ISI Web of Knowledge Full Text Links
- DOI (Digital Object Identifier)
- PubMed LinkOut – for medical and science resources

If found, EndNote downloads and attaches the files to the references. You can search for up to 250 records at a time.

To search for the full text:

1. Highlight the references you want to check.
2. Click the Find full text icon in the toolbar.



Manually adding full text articles and other attachments

If EndNote cannot automatically retrieve the full text, you can manually add the full text from files on your computer.

1. Click to select the record.

2. Press **Control-Alt-A**.
3. Find the PDF or other format file on your computer.
4. Click **Open**. The file will be copied to your EndNote reference and library.

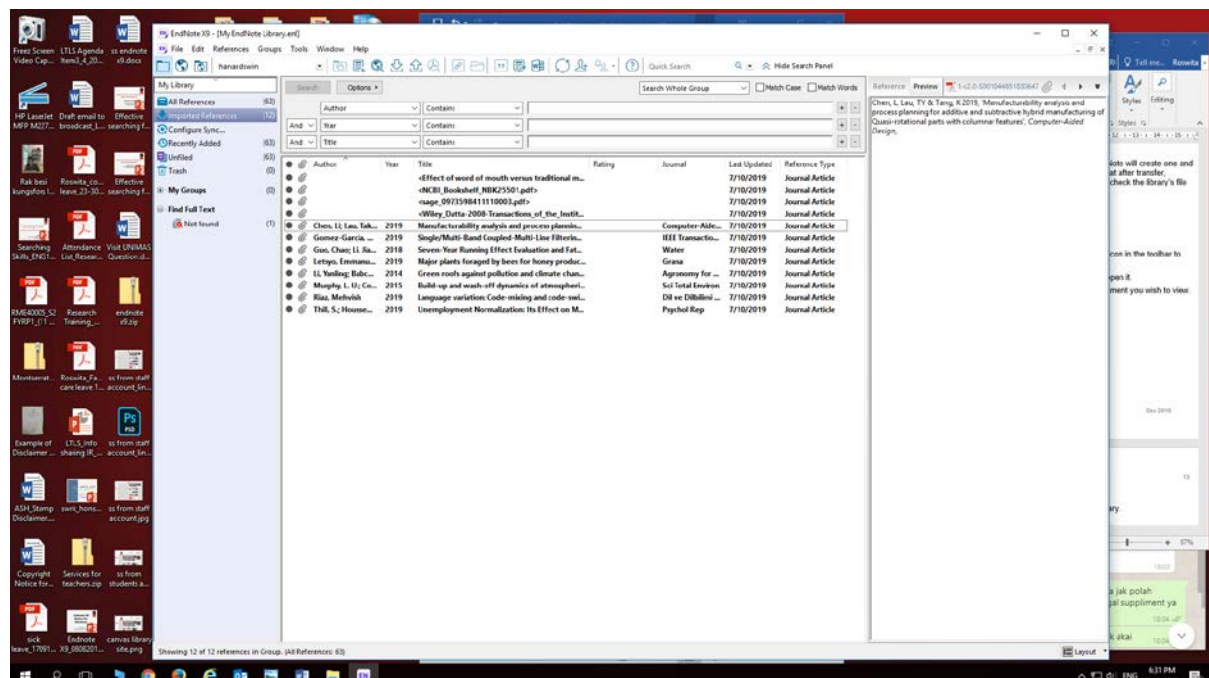
Importing PDFs from your files

EndNote X9 can also import folders of PDFs you already have and attempt to find the bibliographic (publication) information for the more recently published articles.

To import a folder of saved PDFs:

1. Open your EndNote library.
2. Click on **File > Import.> Folder > Choose**
3. Find the folder of PDFs and click on it.
4. Click **OK**.
5. Check the Duplicates option. Select your preference.
6. Click **Import**
7. Any PDFs with embedded DOI data will be imported to new records with basic bibliographic data.
8. All others will be added to individual default journal article records and the file name of the PDF will be listed in the title field. You will need to manually add bibliographic data for those references.

Author	Year	Title	Rating	Journal	Last Updated	Reference Type
Gray, Rebecca; B...	2016	'I'm Working Towards Getting Back Together'...		Child Abuse Re...	9/03/2018	Journal Article
		<mohr 2002.pdf>			9/03/2018	Journal Article
		<elbogen 2009.pdf>			9/03/2018	Journal Article
Stallman, Helen ...	2014	A Randomized Controlled Trial of Family Transi...		Journal of Divo...	9/03/2018	Journal Article
		<renaming mpd.pdf>			9/03/2018	Journal Article
		<Angarne-Lindberg 2009.pdf>			9/03/2018	Journal Article
Ross, Lisa Thoms...	2010	Parental Depression and Divorce and Adult Chi...		Journal of Child...	9/03/2018	Journal Article
Brown, Thea; Tys...	2014	Filicide and Parental Separation and Divorce		Child Abuse Re...	9/03/2018	Journal Article
Romero-López, ...	2016	Una revisión de los trastornos disociativos; de L...		Anales de Psico...	9/03/2018	Journal Article
Taylor, Raymond;...	2009	Parental Depression in the Context of Divorce ...		Journal of Divo...	9/03/2018	Journal Article
		<143.pdf>			9/03/2018	Journal Article



- ❖ If you choose to import duplicates to a duplicate library, EndNote will create one and report the number of standard and duplicate imports. Note that after transfer, EndNote may display the duplicate library – it is important to check the library's file name at the top of the screen.

Opening attached PDFs

1. Click the reference to select it.
2. You can view the file in the preview pane or click the **Open File** icon in the toolbar to view the first attachment in a new window.
3. If there is more than one attachment, double click the record to open it.
4. Scroll down to the **Attachments** field and double click the attachment you wish to view.

Searching your library

Click **All References** to make sure you are searching the whole library.

There are two ways to search your library:

1. The **quick search field** in the menu bar – a simple search for a keyword or author name
2. The advanced search panel is hidden – click “**Show search panel**” next to the quick search field to search for a combination of terms.

If you want to search the contents and sticky note comments of your PDFs, you must do an advanced search. You can then set the search field to “Select the Any Field + PDF with Notes” option from the Field list.

The references found in the last search operation are saved in a temporary Search Results group. When you close the library or run another search, this temporary group is discarded.

Managing your references: Creating groups

Groups make it easy to organise a large library into folders or subsets for later access. You might want to create a group to gather the research materials for a particular assignment or journal article. Some researchers use groups to collect resources for each chapter in their thesis.

Tip: Create a group to collect any imported items that you do not currently have in print or electronic full text in your research collection. This will make it easier to identify items that need to be obtained by interlibrary loan.

1. Click the **Groups** dropdown menu.
2. Click on **Create new group**.
3. Call the new group **Need fulltext** and hit **Enter**.
4. Click the **Not Found** group that resulted from the **Find Full Text** search.
5. **Control-A** to select all of the references if they aren't already highlighted.
6. Scroll to the bottom of the summary screen.
7. You can add the highlighted references to the group in a number of ways:
 - i. Drag and drop them onto the group Find Full Text.
 - ii. Click the Groups dropdown menu, click Add References To, and select the group **Need fulltext**.
 - iii. Right click on a selected item, click Add References To, and select the group **Need fulltext**.
8. Click on the group name to see its contents.
 - You can add a reference to a particular group only once. However, you can add that reference to any number of groups.
 - Deleting a reference from a custom group does not delete it from the library.
 - Deleting a reference from a library also deletes it from all groups in that library.

Setting up EndNote sync for auto backup

Syncing to a new EndNote online account

EndNote X9 gives you the ability to automatically back up references via EndNote online <http://www.myendnoteweb.com/> and sync across two or more computers. You can also share the entire library via X9 or just a group (or selected groups) via EndNote online with fellow researchers. Information about sharing groups or libraries is available on our website.

- You can sync one library with up to 1,000,000 references, 5000 groups and unlimited attachments.
- Please only do this on your own computer.
- **Note: You can only link one library to an EndNote online account. This online account will then "lock" to that computer's copy of the EndNote software.** You will not be able to work with more than one synced account per personal computer or per login on Swinburne computers.



1. Click the **Sync icon on the toolbar**
2. Click **Sign Up**. Starting from EndNote X9 will get you a full-service account. Going directly to the website gets you only a basic account.
3. You will be taken to the EndNote online website. Click the orange "sign up" link or use your Facebook or LinkedIn account to register.
4. Complete the registration process. You may be required to wait for an email and key in a confirmation code.
5. The Sync system will authorise your new account and add the details to EndNote X9. The library will automatically sync every 15 minutes and when you close the library. Change the settings in the Sync screen if required.
6. Click **OK** again to close the Preferences screen.
7. A new **Sync Status group** is listed in the groups pane.
8. Click the **Sync** symbol to carry out the first sync exchange.
9. If you have references in the library, you will be asked to make a compressed backup. Follow the instructions to do so.
10. The first sync can take a long time, especially if you have many references with full text. Please be patient - future syncing will be much quicker.
11. EndNote X9 and EndNote online will now sync automatically. Please remember to regularly back up your Word documents.

Syncing to an existing EndNote online account

1. Open your library in EndNote X9.
2. Click the Sync button in the toolbar
3. Type your existing EndNote online login and password into the EndNote Account Credentials fields.
4. Click **OK**.
5. The library will automatically sync every 15 minutes and when you close the library. Change the settings in the Preferences > Sync screen if required.
(Edit > Preferences > Sync for Windows or EndNote > Preferences > Sync for Mac)
6. Click OK to save the settings.

Syncing an existing account to a second computer (Mac or Windows)

1. These instructions assume you have already created and synced a library on the first machine. Make a note of the name of the library.
2. Open EndNote X9 on the second computer (Mac or Windows).
3. Click **File**
4. Click **New**
5. Create a new library with the **same** name as the original synced library.
6. Click the Sync button in the toolbar
7. Type your existing EndNote online login and password into the EndNote Account Credentials fields.
8. Click OK.
9. The library will automatically sync every 15 minutes and when you close the library. Change the settings in the Preferences > Sync screen below if required.
(Edit > Preferences > Sync for Windows *or* EndNote > Preferences > Sync for Mac)
10. Click OK to close the Preferences screen.
11. Click the Sync symbol to carry out the first sync exchange.
12. The first sync can take a long time, especially if you have many references with full text. Please be patient - future syncing will be much quicker.

The synced library's references, attachments and groups will be added to the library on your second machine. Your computers will now sync to EndNote online and update automatically. Please remember to regularly back up your Word documents.

When should I use Cite While You Write?

EndNote's Cite While You Write (CWYW) feature is a powerful tool that allows you to create "live" bibliographies that update when you insert references into your text. However it can cause corruption in your Word documents if used incorrectly.

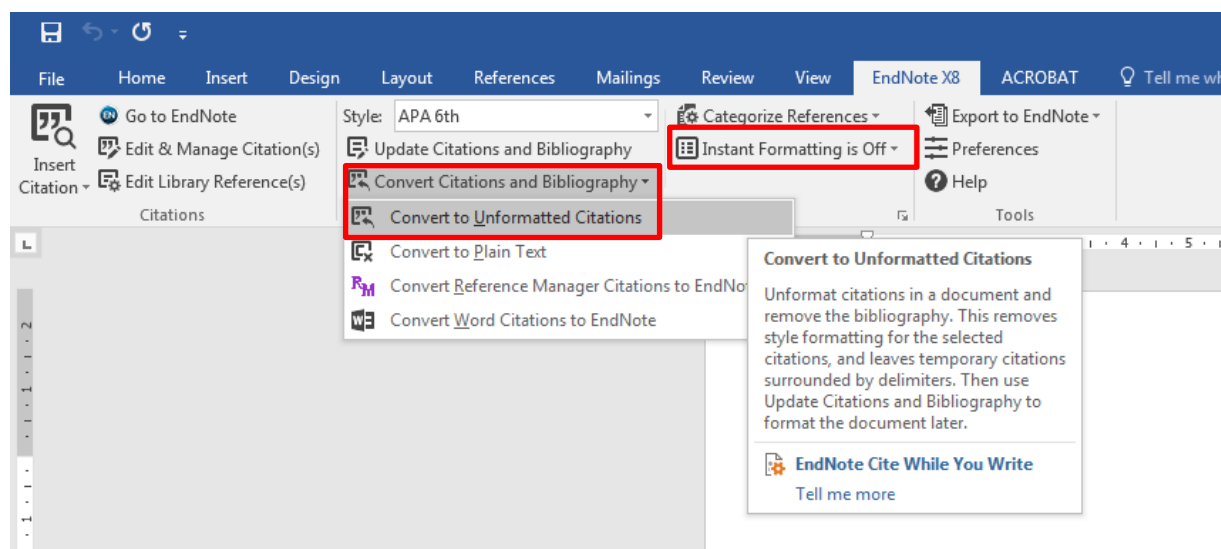
1. CWYW involves complex code that will be corrupted if you incorrectly move or delete those references. This can lead to bibliographies failing to format properly later, or the wrong references appearing in the paper.
2. It can also conflict with **Track Changes**, another feature of Word used frequently by supervisors and collaborating authors.
3. You need to either use the powerful features of Cite While You Write correctly from the beginning or insert them at the end of the writing process when you have finalised the content of your paper and have accepted or rejected all tracked changes.

We recommend two options while you are in the writing stage: placemarkers or unformatted citations.

1. Use plain text to put in "**placemarkers**." A placemaker such as <<Jones and Wade, 2015 pg12>> can be safely moved or deleted. You can find the placemarkers easily by using Control-F and searching for << and replace them with formatted citations when the paper is at the final stages of completion.
2. Use **unformatted citations**. These use EndNote code to identify the reference in your EndNote library, but the code is not active and can be safely moved or deleted.

An unformatted citation looks like this: {Dallman, 2016 #9}

- a. Click the EndNote X9 tab in Word.
- b. If Instant formatting is turned on, click to turn it off.
- c. If you have formatted CWYW citations, click **Convert Citations and Bibliography**.
- d. Click **Convert to Unformatted Citations**.
- e. If you need to see the formatted references, click **Update Citations and Bibliography**. Remember to unformat them afterward.



I'm ready to use Cite While You Write. Now what?

What are output styles?

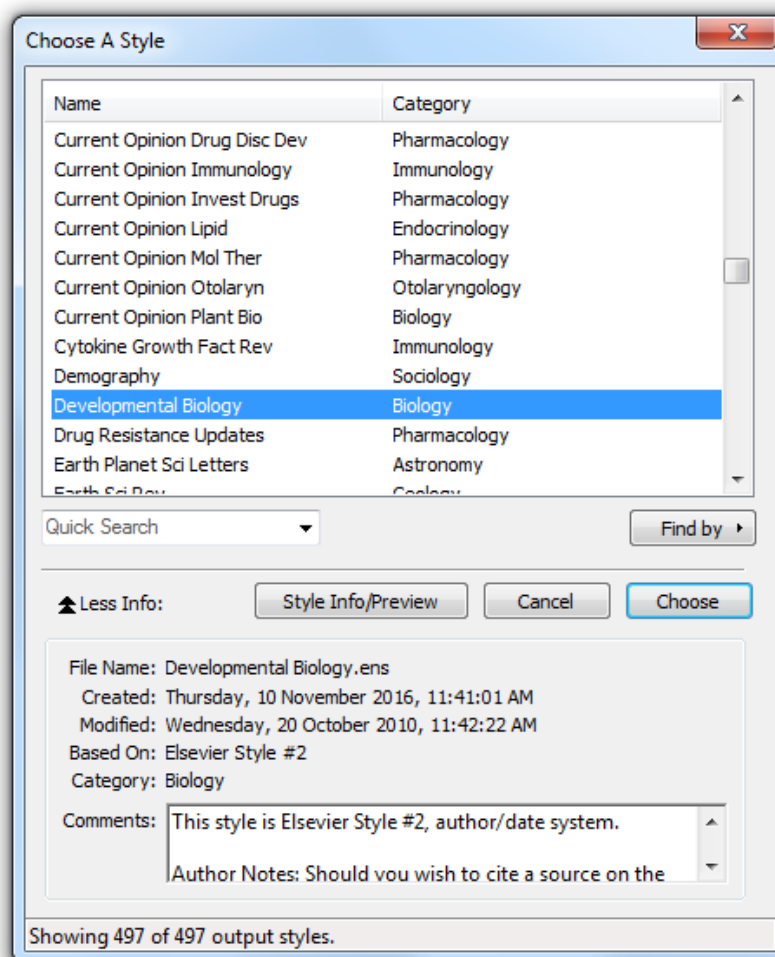
An output style determines how the selected reference will be formatted and displayed in Word. You will be able to concentrate on writing your essay or thesis, with the knowledge that EndNote will handle the correct punctuation and formatting of your references.

Please check with your department to see if there is a preferred style.

If you need a style such as APA 6th, Chicago A or B, Nature, IEEE or many others, EndNote X9 has almost 500 included styles.

Activating a style within EndNote

1. Click the **Current Style** drop down menu.
2. If the style you want is not listed, click **Select another style**.
3. Scroll through and click the style you wish to activate.
4. Click the **Style Info/Preview** button if you want to see a sample bibliography.
5. Click **Choose**. The style is now available and active within EndNote.



What if the style is not included in EndNote?

Some departments require the Swinburne Harvard style, based on our online Swinburne Harvard Style Guide. The Harvard style included with EndNote does not match Swinburne's Harvard style.

We will download the Swinburne style to practice downloading and activating styles.

First we need to set up a folder on your computer to which we can save the file.

1. Open Windows Explorer and click **Documents**
2. Right click and select **New > Folder**
3. Name the new folder **EndNote**
4. Double click the **EndNote** folder
5. Right click and select **New > Folder**
6. Name the new folder **Styles**

Now we can find and save the Swinburne Harvard style

7. Go the library's EndNote page at <http://www.swinburne.edu.au/library/referencing/references-endnote/endnote/>
8. Click the + next to **Swinburne Harvard Style Guild**
9. Click on the installation link for the Swinburne Harvard style.
10. You should be offered a chance to open or save the file. Click **Save**.
11. Click **OK**.
12. Select the **C:/Documents/EndNote/Styles** folder.
13. Click **Save**.
14. You will need to activate the style in EndNote or Word in order to use it.

If you need a specialist journal style, for example the CSIRO's biology style, the EndNote website hosts thousands of styles.

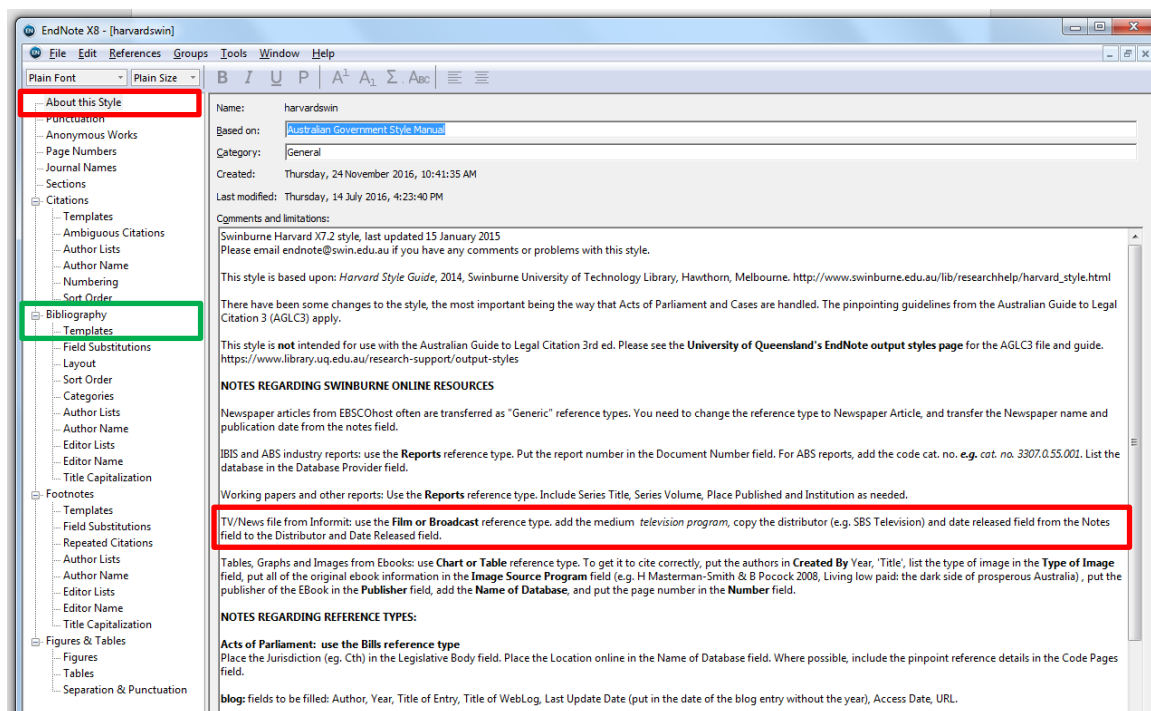
1. Go to <http://endnote.com/downloads/styles>
2. Type in the style or journal name
3. Click **Apply**.
4. Click the download link for your style.
5. Then follow the steps above to save the style to the **C:/Documents/EndNote/Styles** folder.

How do I know which data fields a style uses?

Different types of research have different types of publication information. For example, a journal article may have volume, issue or date details that a webpage would not.

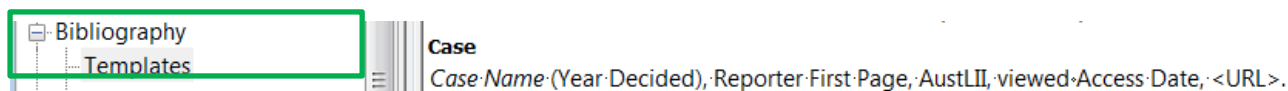
A style can format your publication information, but only if the information is in the right fields. Many styles, including the Swinburne Harvard style, have guidelines.

1. Make sure the style is active.
2. Click Edit.
3. Click Output Styles.
4. Click "Edit <output style name> e.g. Edit 2015harvardswin
5. The "About this style" tab may contain detailed instructions for entering publication information.



6. You can also check the Bibliography -> Templates section. This will list each of the fields that are checked for a particular reference type. In the example below you are prompted to fill in the following fields:

Case Name -> Year Decided ->Reporter ->First Page ->Access Date ->URL.



Doing so will generate a reference that looks like this:

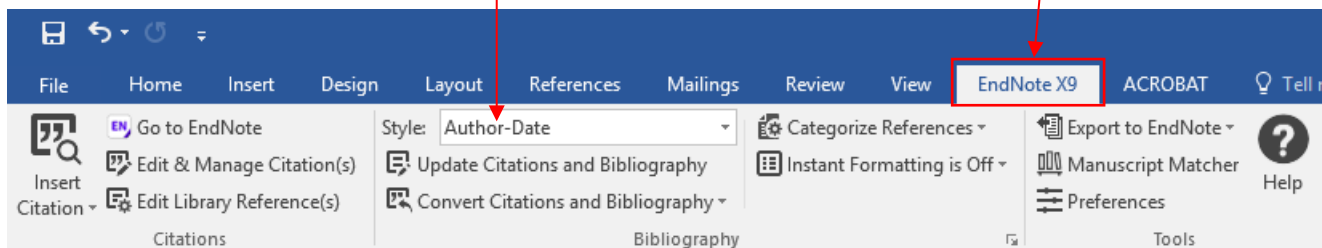
R v Ramage (2004), VSC 508, AustLII, viewed 4 April 2014, <[<http://www.austlii.edu.au/cgi-bin/sinodisp/au/cases/vic/VSC/2004/508.html?stem=0&synonyms=0&query=title\(r%20and%20ramage%20\)>](http://www.austlii.edu.au/cgi-bin/sinodisp/au/cases/vic/VSC/2004/508.html?stem=0&synonyms=0&query=title(r%20and%20ramage%20))>.

7. Click **Control-W** to close the Style window.

Changing a style within Word

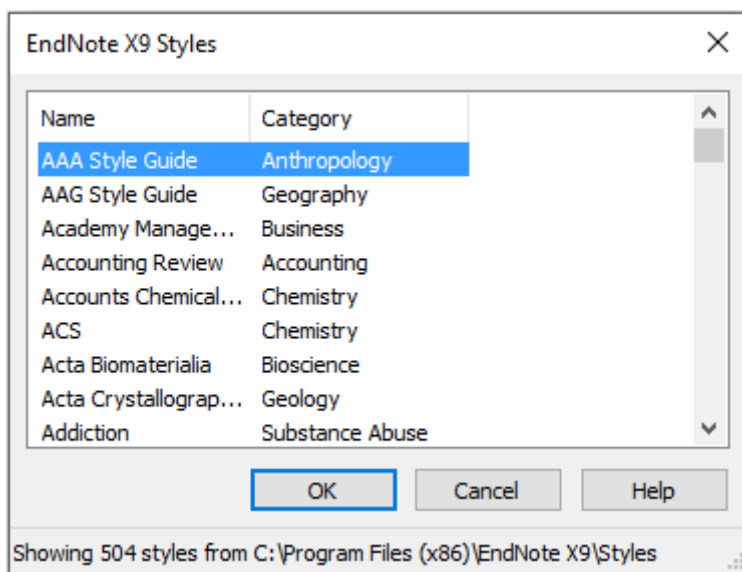
When you install EndNote X9 onto your computer, it automatically adds the necessary EndNote tab to the tools in your Word software. Click on the EndNote X9 tab.

The style shown is usually the style you activated in EndNote X9.



If you need to change to another style for this document.

- Click **Select another style**.
- Click the grey **Name** header to sort the styles alphabetically.
- Click the first style, then type the first couple of letters of the style name to jump down the list.
- Click the style you wish to activate.



- Click **OK**.

If you need to change the style of your bibliography at a later date, use the Current Style drop down menu on the EndNote X9 tab to choose an active style or click **Select another style** to activate a new one. EndNote X9 and Word 2016 will automatically reformat your document.

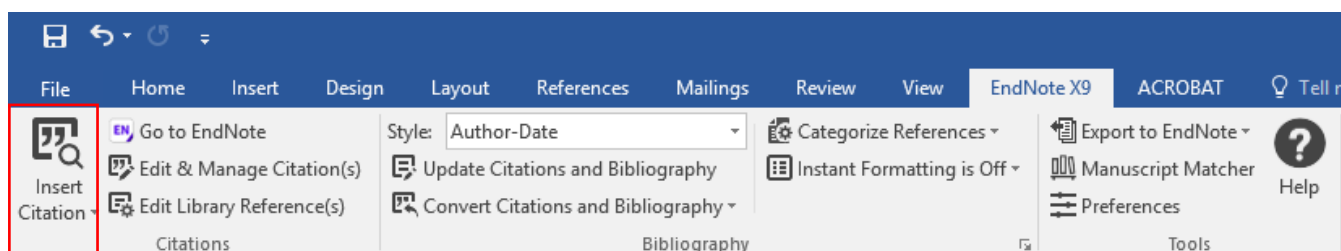
Using CWYW with Word: an exercise

1. Make your EndNote library is open.
2. Open a new Microsoft Word document.
3. Type in the following code to generate some random sentences we can work with:
=rand(2,4)
4. Press **Enter**.
5. Click at the end of the first sentence.

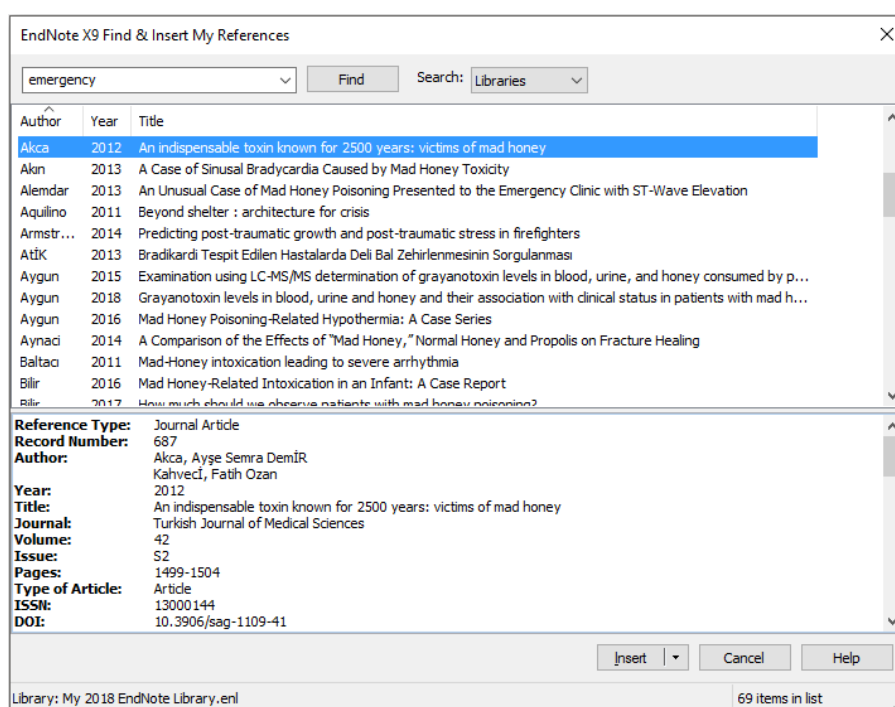
EndNote allows you to insert references in a number of ways. If you are comfortable switching between screens using Alt-Tab, you can also select an item from EndNote's summary screen and use the **Insert Citation icon** to drop the reference into the Word document.

You can also use the **EndNote X9** tab of the tools ribbon.

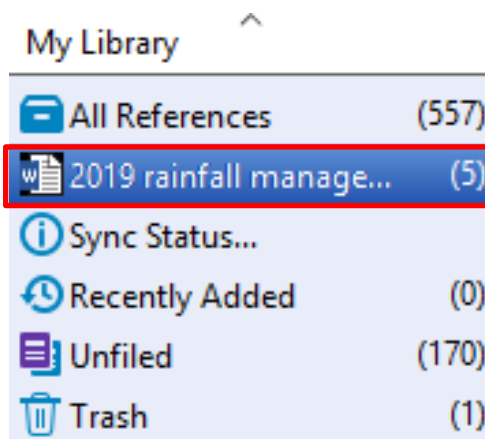
6. Click **Insert Citation**.



7. EndNote displays a Find Citation(s) dialog window.
8. Type an author's last name, keyword or year into the "Search for" box. For this example, type the phrase **drainage**.
9. Click **Search**.
10. EndNote compares the identifying text to your EndNote references and then lists the matching references. When multiple references match the search, you can identify, highlight, and insert the appropriate reference.



11. Click on a reference to select it. If several papers might be relevant for an in-text citation, hold down the **Ctrl** key and click on the references you wish to cite.
12. Click **Insert**. A single reference will be inserted into the text within its own bracket; multiple references will be inserted into a bracket and sorted according to your chosen output style.
13. Once the bibliography has been generated, the in-text citation will list the papers in an order specified by your output style.
14. Save the EndNote-connected Word document.
15. Once you have added a formatted citation to the document and updated your bibliography, a group with the document's title will appear in your EndNote library. This group shows all linked citations within the document and is only available when the document is open and citations are formatted.



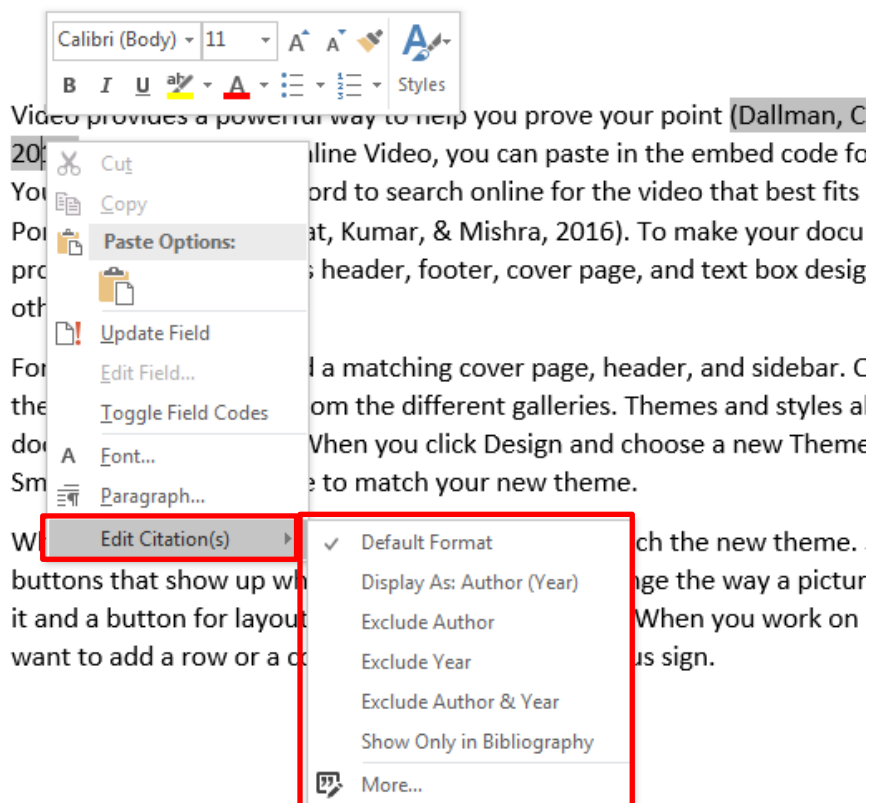
16. Want to use unformatted citations during the writing stage? (recommended)
 - a. Click the EndNote X9 tab in Word.
 - b. Click Convert to Unformatted Citations.
Note that you will not then have a clickable Word group in EndNote.

Changing a reference's appearance:

You can quickly customise a formatted citation's appearance by

- moving the author name out of the brackets
- hiding the author name or date
- or hiding the in-text reference completely

1. Right-click on the citation to select it.
2. Scroll down the pop-up menu to **Edit Citation**.
3. Click on the option you need.



Adding text and pagination

You may wish to modify citations to add pagination details or "see also" references.

The following modifications are available:

Prefix	Add preceding text, such as "Cited in " Make sure you leave a space after the text e.g. the discovery (as cited in Bender, 2004) This can also be used for psychological test abbreviations. e.g. Strengths and Difficulties Questionnaire (SDQ: Goodman, 1997)
Suffix	Adds following text. Use this to add page numbers after the citation. Make sure you put a space before the text e.g. the discovery (Bender, 2004 p.4)
Pages	This field does not work with all output styles. We recommend you use the Suffix modification instead.

To customise a formatted citation by adding a prefix, suffix or page numbers, or to modify several citations:

1. Click on the citation to select it.
2. Click on **Edit & Manage Citation(s)** in the Word EndNote toolbar.
3. The **Edit & Manage Citations** dialogue box will be displayed. All the citations within the document will be listed. Click the citation you want to customise.
4. Customise the citation as needed in the **Edit Citations** section of the window. If you wish to change one reference within a group, make sure you click on the reference in the "Citations in document" window first, to ensure you change the correct reference.
5. Click **OK**.

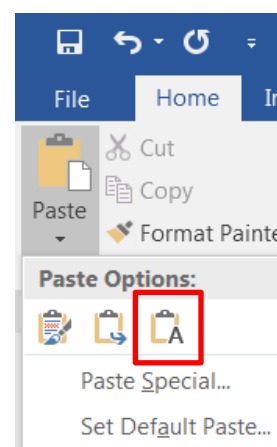
Safely copying text and references between documents

There is a lot of complex hidden code that you don't see when EndNote and Word work together. That code can be corrupted if you copy or delete references incorrectly. You can tell if a paragraph has EndNote code in it. Select the paragraph: EndNote links are highlighted in a dark grey.

On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document (Barrios et al. 2011). You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. (Carro et al. 2002) explains when you create pictures, charts, or diagrams, they also coordinate with your current document look. You can easily change the formatting of selected text in the document text by choosing a look for the selected text

There is a safe way to copy text with EndNote links to another document.

1. Highlight the desired text
2. **Control-C** to copy the text.
3. Switch to the other document.
4. On the Home Tab, click the drop down under Paste.
5. Click the icon for "Paste text only."
6. Re-link the EndNote reference.

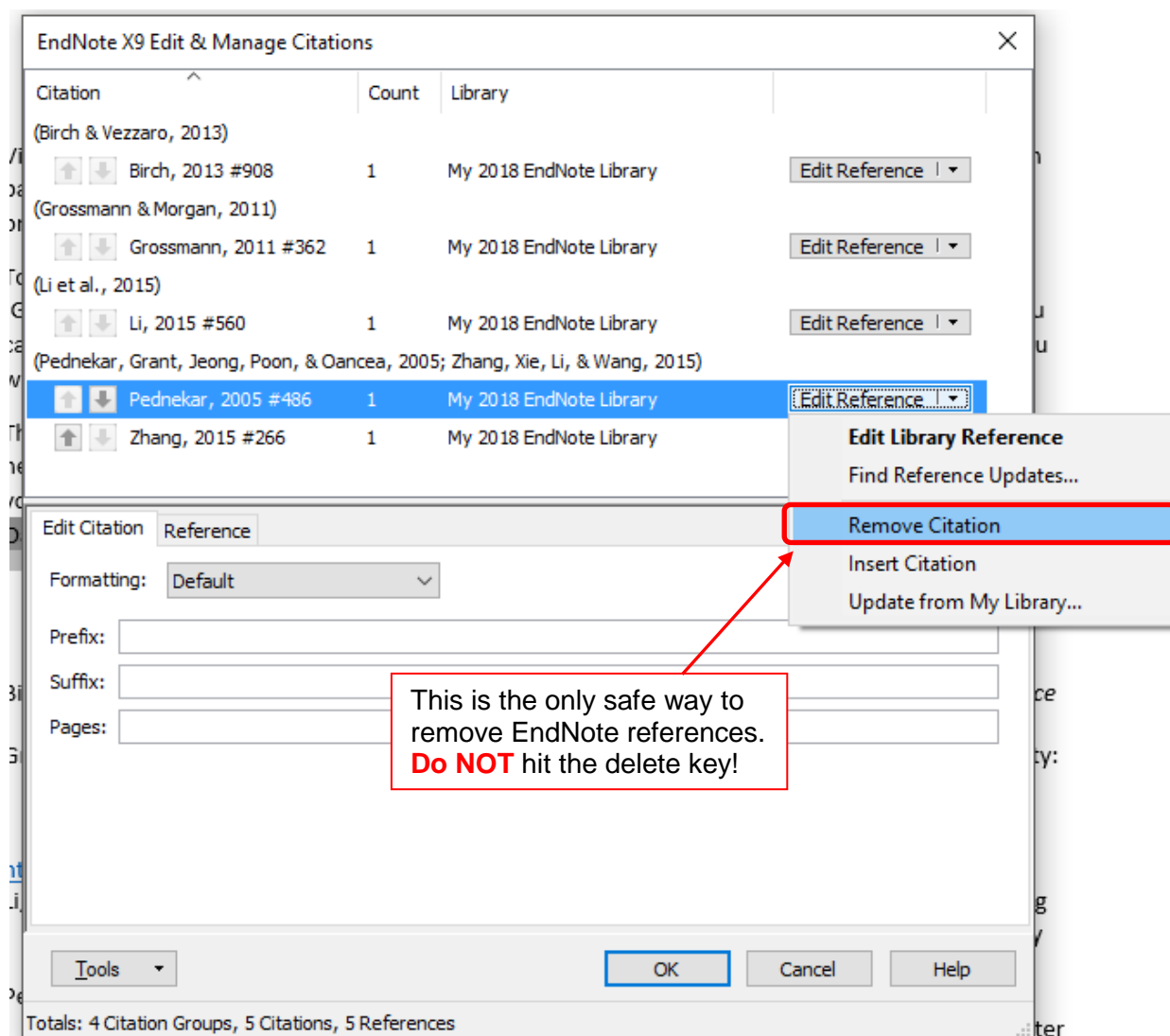


Safely deleting references

Please **do NOT** delete unwanted citations by highlighting them and hitting the delete key. While doing so does remove the unwanted citation's text, it leaves all of the "behind the scenes" coding that allows EndNote X9 and Word to work together. This orphaned code can cause all sorts of problems later, including citations appearing out of order, and is hard to fix.

If you wish to remove a citation completely:

1. Click on the citation to select it.
2. Click on **Edit & Manage Citation(s)** in the Word EndNote toolbar.
3. The **Edit & Manage Citation(s)** dialogue box will be displayed. All the citations within the document will be listed. Click the **Edit Reference** dropdown arrow next to the citation you want to delete.
4. Click **Remove Citation**.



5. Click **OK**.

Cite While You Write: an exercise

1. Open the EndNote library that contains the references you wish to cite. We will use our new library.
2. Open a new Microsoft Word 2016 document.
3. Type in the following code to generate some random sentences you can work with:
=rand(2,4)
4. Press *Enter*.
5. Click at the end of the first sentence.
6. **Add an in-text citation** to the end of the sentence.
7. **Edit the citation and hide the author's name** from the brackets.
8. Add a different citation at the end of another sentence.
9. Safely and correctly **remove the citation** – **don't hit the delete button!**
10. Add another citation within a sentence. **Highlight and drag the reference** to a different part of the document. (Moving citations within the same document will not corrupt the document.)
11. Edit the citation to **add a page number**.
12. Edit the citation to **hide the publication year**.
13. **Activate a new style** within Word: choose IEEE (a numbered style)
14. **Change the style of the reference list** to IEEE.
15. **Change the references to unformatted citations**.
16. **Save** the new Word file to your c:/Research/ directory.

Where can I get help with EndNote?

The Swinburne Library EndNote page:

<http://www.swinburne.edu.au/library/referencing/references-endnote/endnote/>

Any training videos, patch notes, the Swinburne output style and changes to the training notes will be listed here, as well as frequently asked questions.

Need to refresh your skills? The EndNote for Windows and Mac online training series is available via iTunesU, YouTube or from our website at

<http://www.swinburne.edu.au/library/referencing/references-endnote/endnote/>

Search the help menu within EndNote

The EndNote website:

<http://www.EndNote.com>

You can download thousands of output styles from this website and view online tutorials.

EndNote discussion forum:

<http://forums.thomsonscientific.com/ts/?category.id=EndNote>

Still having trouble? Use our contact form to get expert help from the EndNote team.

<http://www.swinburne.edu.au/library/referencing/references-endnote/endnote/endnote-enquiry/>