

Endnote 20 Basic for Windows and Mac

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.

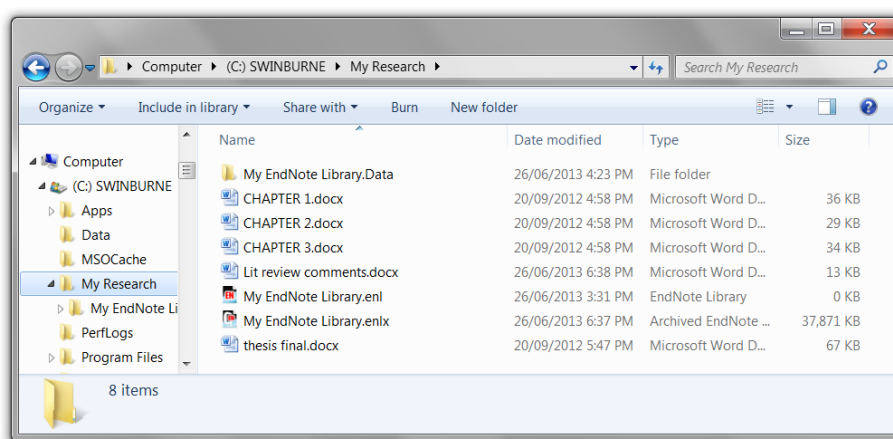
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Checklist for Keeping a stable EndNote library

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

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. Make sure that folder is not part of your syncing system for backing up your files.
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 manually 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 20. 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.

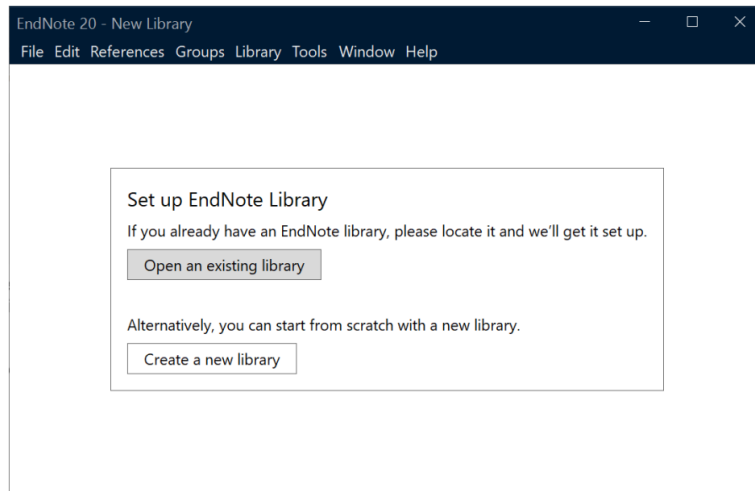
Sync can automatically backup your EndNote references and attachments, but not your Word documents.

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. Type the word 'Endnote; into the search box of your Windows tool bar
2. Click the Endnote apps



3. If you have used EndNote X9 previously, click "Open an existing library" from the starter screen.
4. If you haven't used EndNote before, you will be presented with a box prompting you to set up a new EndNote Library.
5. Click "Create a new library."
6. EndNote presents a window prompting you to name and save the new library. We need to create a folder on the hard drive for your research. Click the new folder to select it. (Do not save to OneDrive or Dropbox or other syncing drives or the library will get damaged.)
7. Change the save name if required. The extension ".enl" stands for "EndNote Library". EndNote will add ".enl" automatically.
8. Click Save.
9. The new empty library will open in EndNote 20

Adding references to your database

We recommend the Firefox or Chrome browsers for searching our databases and transferring records to EndNote 20.

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

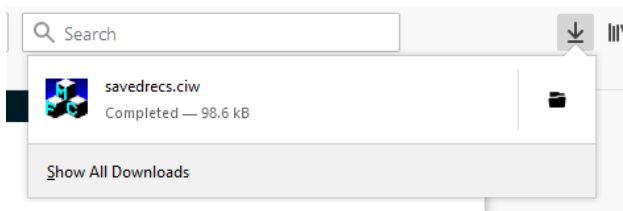
1. Make sure that you have your EndNote library open.
2. Go to the Library homepage <http://www.swinburne.edu.my/library>
3. A link for **Science Direct** appears under the Library search box. Click the **Science Direct** link.
4. Login with your library Angka.sa2 account
5. Type the words: **rainfall 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 website interface. At the top, there is a search bar with the query "rainfall and 'stormwater runoff'". Below the search bar, there are filters for "Journal/book title", "Volume", "Issue", and "Pages". The search results show 1,947 results, sorted by relevance. A red box highlights the "Export citation to RIS" option in the export menu for a selected article. The article title is "Performance evaluation of modified bioretention systems with alkaline solid wastes for enhanced nutrient removal from stormwater runoff". The authors listed are Zhaoyang You, Li Zhang, Shu-Yuan Pan, Pen-Chi Chiang, and Shujuan Zhang. The article is from Water Research, Volume 161, 15 September 2019, Pages 61-73.

9. This should then prompt the transfer windows, or save on the task bar below the Windows, Click the file or open the file directly in EndNote.
10. EndNote 20 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.

Mac transfer: You may need to click **Choose...** and point to EndNote 20 in your Applications folder.

12. Click OK.
13. You may see a second "Choose destination" window if you also use EndNote Online. Click **EndNote** and **OK**
14. If you don't see a transfer window at step 8, the file may automatically be saved to your Downloads folder (depending on your browser settings.)
 - Chrome for Windows and Firefox for Mac have an arrow icon in the menu bar you can click to find the file.
 - Chrome for Mac saves the file to a menu bar at the bottom of the screen.
 - Otherwise use your File Explorer to locate the .ciw file and click it. This should then prompt the transfer window or open the file directly in EndNote.



15. EndNote 20 should transfer the records directly to your current library. Some Macs will request you point to the required library.
16. The references will be transferred to your library as an **Imported references** group. Note this does not retrieve the full text of the article.

EndNote 20 - My 2021 Research Library.enl

File Edit References Groups Library Tools Window Help

Imported References

Sync Configuration

All References 50

Imported References 50

Recently Added 50

Unfiled 50

Trash 0

MY GROUPS

My Groups

FIND FULL TEXT

GROUPS SHARED BY ...

ONLINE SEARCH

Library of Congress 0

LISTA (EBSCO) 0

PsycINFO (OvidSP) 0

PubMed (NLM) 0

Web of Science C... 0

more...

Imported References

50 References

	Author	Year	Title	Rating	Journal	Last Upd...	Reference ...
●	Akther	2020	Chemical leaching behaviour of a full-scale gre...		Ecolog...	17/11/20...	Journal Art...
●	Baek	2020	Assessment of a green roof practice using the c...		Journa...	17/11/20...	Journal Art...
●	Bakr	2020	Water quality impacts of bridge stormwater run...		Scienc...	17/11/20...	Journal Art...
●	Biniak-...	2020	Precipitation structure as an indicator of reducti...		Journa...	17/11/20...	Journal Art...
●	Bu	2020	A method for determining reasonable water ar...		Enviro...	17/11/20...	Journal Art...
●	Cha	2020	Assessment of suspended solid and particles re...		Desali...	17/11/20...	Journal Art...
●	Chapa	2020	A multi-parameter method to quantify the pote...		Resou...	17/11/20...	Journal Art...
●	Charters	2020	Predicting Event-Based Sediment and Heavy M...		Water	17/11/20...	Journal Art...
●	Christian	2020	Pollutant Concentration Patterns of In-Stream U...		Water	17/11/20...	Journal Art...

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 and click on it.
6. Go to Tools menu on your right and click **Export**.

New Search Multimedia Home Library Website Publications Sign In Folder Preferences Language Help Exit

SWINBURNE UNIVERSITY OF TECHNOLOGY

Searching: Discovery Service for Swinburne Sarawak Campus

Keyword: rainfall and "stormwater runoff" Search

Basic Search Advanced Search Search History

Detailed Record

Result List Refine Search 1 of 28,499

Stormwater Runoff Pollutant Loading Distributions and Their Correlation with Rainfall and Catchment Characteristics in a Rapidly Industrialized City.

Authors: Li, Danyu¹
Wao, Jinqian^{1,2} pjqqwan@scut.edu.cn
Ma, Yongqian^{1,3}
Wang, Yao¹
Huang, Bingzhi¹
Chen, Yaomei¹

Source: PLOS ONE, Mar2015, Vol. 10 Issue 3, p1-17, 17p.

Document Type: Article

Subject Terms: *RAINFALL
*RUNOFF
*INDUSTRIALIZATION
*WATERSHEDS
*URBANIZATION
*WATER pollution
*DEVELOPING countries

Tools

Google Drive

Add to folder

Print

E-mail

Save

Cite

Export

Create Note

Permalink

eds-b-ebshost-com.swinburnedb.librarynet.com.my/eds/detail/detail?vid=5&sid=20a3eec6-220d-4d2b-a49e-2550b9558418%40sessionmgr102&bdat...

Searching: Discovery Service for Swinburne Sarawak Campus

Keyword: rainfall and "stormwater runoff" Search

Basic Search, Advanced Search, Search History

Export Manager Save E-mail

Number of items to be saved: 1

Save citations to a file formatted for:

- Direct Export in RIS Format (e.g. CITAVI, EasyBib, EndNote, ProCite, Reference Manager, Zotero)
- Generic bibliographic management software
- Citations in XML format
- Citations in BibTeX format
- Citations in MARC21 format
- Direct Export to RefWorks
- Direct Export to EndNote Web
- Direct Export to EasyBib
- Download CSV
- Direct Export to NoodleTools

Save Cancel

Stormwater Runoff Pollutant Loading Distributions and Their Correlation with Rainfall

7. Choose **Direct Export in RIS Format (e.g. CITAVI, EasyBib, Endnote, ProCite, Reference Manager, Zotero)**
8. Click **Save**
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 20 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.

Research 2021

File Edit References Groups Library Tools Window Help

Sync Configuration

All References 1

Imported References 1

Recently Added 1

Unfiled 1

Trash 0

MY GROUPS

My Groups

FIND FULL TEXT

GROUPS SHARED BY ...

ONLINE SEARCH

Library of Congress 0

LISTA (EBSCO) 0

PubMed (NLM) 0

Web of Science C... 0

more...

Imported References

Advanced search

Imported References

1 Reference

Author	Year	Title	Journal	Last Updated	Reference
Ma, Yukun...	2021	Transport process...	Environme...	11/8/2021	Journal A

Ma, 2021 #1 Summary Edit PDF

Attach file

Transport process and source contribution of nitrogen in stormwater runoff from urban catchments

Y. Ma, S. Wang, X. Zhang and Z. Shen

Environmental Pollution 2021 Vol. 289 Issue 4 Pages 117824

DOI: <https://doi.org/10.1016/j.envpol.2021.117824>

<https://www.sciencedirect.com/science/article/pii/S0269749121014068>

harvardswin Insert Copy

Ma, Y. Wang, S. Zhang, X. & Shen, Z. 2021, 'Transport process and source contribution of nitrogen in stormwater runoff from urban catchments', *Environmental Pollution*, vol. 289, no. 4, p. 117824.

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 displays the EndNote 20 interface. On the left is a dark sidebar with navigation options: Sync Configuration, All References (51), Imported References (1), Recently Added (51), Unfiled (0), Trash (0), MY GROUPS (My thesis, Bib research, need article, not useful, My Groups, PSY100001, Rainfall Runoff), FIND FULL TEXT (Found PDF, Found URL, Not found), GROUPS SHARED BY..., and ONLINE SEARCH. A red box labeled "Groups pane" points to the ONLINE SEARCH section.

The main area shows a table of "All References" with 51 records. The table has columns for Author, Year, Title, Rating, Journal, Last Upd..., and Reference Type. A red box labeled "Search the library" points to the search bar at the top. A red box labeled "Rate your research" points to the Rating column. A red box labeled "Library summary screen - each line represents a record in your Library" points to a row in the table.

On the right, a "Summary" panel is open for a record by Akther, 2020. It includes an "Attach file" button, the title "Chemical leaching behaviour of a full-scale green roof in a cold and semi-arid climate", author information, and a detailed abstract. A red box labeled "Summary Panel - click Edit to correct a reference" points to the "Edit" button. A red box labeled "Current Styles drop down menu" points to the "harvardswin" style selector.

Author	Year	Title	Rating	Journal	Last Upd...	Reference Type
Akther	2020	Chemical leaching behaviour of a full-scale gre...		Ecological Engineering	17/11/20...	Journal Article
Baek	2020	Assessment of a green roof practice using the c...		Journal of Environmental Management	17/11/20...	Journal Article
Bakr	2020	Water quality impacts of bridge stormwater		Science of the Total Environment	17/11/20...	Journal Article
Biniak-Pierog	2020	Precipitation structure as an indicator of red		Journal of Hydrology	17/11/20...	Journal Article
Bu	2020	A method for determining reasonable water ar...		Environmental Earth Sciences	17/11/20...	Journal Article
Cha	2020	Assessment of suspended solid and particles re...		Desalination and Water Treatment	17/11/20...	Journal Article
	2020	A multi-parameter method to quantify the pote...		Resources Conservation and Recycling	17/11/20...	Journal Article
	2020	Factors affecting the ability of extensive green r...		Science of the Total Environment	17/11/20...	Journal Article
		Understanding the Performance and Applicabili		Ksce Journal of Civil Engineering	17/11/20...	Journal Article
Guerra	2020	Understanding th		Engineering	17/11/20...	Journal Article
Hart	2020	Examining coasta		Environment	17/11/20...	Journal Article
Hu	2020	The characteristics of rainfall runoff pollution an...		Science of the Total Environment	17/11/20...	Journal Article
Huang	2020	Experimental study on the hydrological perfor...		Hydrological Processes	17/11/20...	Journal Article
Jiang	2020	Low-impact development facilities for stormwat...		Journal of Hydrology	17/11/20...	Journal Article
Kandler	2020	Real time controlled sustainable urban drainage...		Journal of Water Supply Research and Tec...	17/11/20...	Journal Article
Kumar		Hybrid approach for urban hilly catchment runo...		Hydrological Sciences Journal-Journal Des...	17/11/20...	Journal Article
Lee	2020	Residential urban stormwater runoff: A compre...		Science of the Total Environment	17/11/20...	Journal Article
Liu	2020	Stormwater runoff and pollution retention perf...		Environmental Science and Pollution Resea...	17/11/20...	Journal Article
Liu		Experimental Study on the Rainfall-Runoff Resp...		Environmental Management	17/11/20...	Journal Article
Liu	2011	Stormwater Runoff Characterized by GIS Deter...		Environmental Management	17/11/20...	Journal Article

EndNote's Preferences setup can be found in the EndNote 20 menu (**Mac**) or Edit Menu (**Windows**)

The **File** dropdown menu:

- Open, close, save and create EndNote libraries.
- Import individual pdfs or folders of pdfs - EndNote will attempt to find the bibliographic data for you.
- Make a compressed backup. (Limited to libraries of less than 4 GB in size and/or 65,535 files)

The **References** menu:

- Create, edit and delete references
- Find Reference Updates – search for missing information
- Find full text from a limited set of resources.
- Reference summary –see which groups it is assigned to.

The **Groups** menu:

- Create, rename, edit and delete groups, which are a method of sorting your references.

The **Library** menu:

- Manually sync your library
- Find duplicates
- Find/Replace and Change/Move/Copy fields

The **Tools** menu:

- Edit the output styles that format the display of references

You may need to make some changes to newly transferred references. Use the reference quick edit tab at the right of your screen and save the change.

Using the Edit panel

Sometimes references do not export smoothly from a database. You can make changes in the **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 Edit section on the **Reference** pane.
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 the Save button.

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.

- 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.

Finding full text for a reference

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

- 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. (click one record and Command-A for Mac, or Control-A for Windows)
2. Click the Find full text icon in the toolbar.

The screenshot shows the EndNote 20 interface. The main window displays a list of references under the heading 'Rainfall Runoff'. The summary panel on the right shows details for a selected reference: 'Simulated Performance of In-Place Pervious Concrete under Varying Storms, Surface Areas, and Infiltration Rates' by L. E. Abera, C. Q. Surbeck and A. M. O'Reilly. A red box highlights the 'Find full text' icon in the toolbar, and another red box highlights the 'Attach file' button in the summary panel.

Author	Year	Title	Rating	Journal	Last Upd...	Reference Type
Abera	2018	Simulated Performance of In-Place Pervious Co...		Journal of Sustainable Water in the Built En...	26/11/20...	Journal Article
Ahamed	2019	ICSM: A New Stormwater Management Strateg...		World Environmental and Water Resources...	26/11/20...	Book
Ahilan	2019	The Influence of Household Rainwater Harvest...		New Trends in Urban Drainage Modelling...	26/11/20...	Book Section
Althier	2020	Chemical leaching behaviour of a full-scale gr...		Ecological Engineering	17/11/20...	Journal Article
Al-Amoush	2018	Harvested Rain Water Quality of Different Roof...		Jordan Journal of Civil Engineering	26/11/20...	Journal Article
Al-Mashaqbeh	2019	Modeling of the stormwater runoff quantity an...		Euro-Mediterranean Journal for Environm...	2/12/2020	Journal Article
Baek	2020	Assessment of a green roof practice using the c...		Journal of Environmental Management	17/11/20...	Journal Article
Bakr	2020	Water quality impacts of bridge stormwater run...		Science of the Total Environment	17/11/20...	Journal Article
Barbanell	2019	Using Ecosystem Services to Engage Students L...		Interdisciplinary Teaching About Earth and ...	26/11/20...	Book Section
Biniak-Pierog	2020	Precipitation structure as an indicator of reduct...		Journal of Hydrology	17/11/20...	Journal Article
Bortolini	2018	Hydrological behaviour of rain gardens and pla...		Urban Forestry & Urban Greening	26/11/20...	Journal Article
Bortolini	2019	Reprint of: Hydrological behaviour of rain gard...		Urban Forestry & Urban Greening	26/11/20...	Journal Article
Braswell	2018	Hydrologic and water quality performance of p...		Journal of Environmental Management	26/11/20...	Journal Article
Bu	2020	A method for determining reasonable water ar...		Environmental Earth Sciences	26/11/20...	Journal Article
Budai	2018	Spatial distribution patterns of four traffic-emitt...		Transportation Research Part D-Transport a...	26/11/20...	Journal Article
Caballero	2018	Application of extended full resolution MERIS L...		Progress in Oceanography	26/11/20...	Journal Article
Chai	2018	Annual variation patterns of the effluent water ...		Environmental Science and Pollution Resea...	26/11/20...	Journal Article
Chapa	2020	A multi-parameter method to quantify the pote...		Resources Conservation and Recycling	17/11/20...	Journal Article
Clark	2019	Chasing Storage during Flood Events in a Small...		International Conference on Sustainable In...	26/11/20...	Book
Cohard	2018	Energy and water budgets of asphalt concrete ...		Urban Climate	26/11/20...	Journal Article

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. Click the "Attach file" button in the Summary panel.
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 20 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 Upd...	Reference Type
Ross	2010	Parental Depression and Divorce and Adult Chil... <143.pdf>		Journal of Child and Family Studies	2/12/2020	Journal Article
Taylor	2009	Parental Depression in the Context of Divorce a...		Journal of Divorce & Remarriage	2/12/2020	Journal Article
Stallman	2014	A Randomized Controlled Trial of Family Transiti... <renaming mpd.pdf> <mohr 2002.pdf>		Journal of Divorce & Remarriage	2/12/2020	Journal Article
Brown	2014	Filicide and Parental Separation and Divorce <elbogen 2009.pdf>		Child Abuse Review	2/12/2020	Journal Article
Gray	2016	'I'm Working Towards Getting Back Together': C...		Child Abuse Review	2/12/2020	Journal Article
Romero-López	2016	Una revisión de los trastornos disociativos; de la...		Anales de Psicología	2/12/2020	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. **Attachments** are listed at the top of the Summary pane. Click to see your options to open the attachment within EndNote, Adobe Acrobat or rename the file.

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 at the top of the reference window – a simple search for a keyword or author name
2. The Advanced search link to search for a combination of terms or search in other fields or the PDF or sticky notes.

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. You may need to scroll up.

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. Ctrl-A to select all of the references if they aren't already highlighted.
6. 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.
7. 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.
 - Want to see which groups you have put a reference in? Click the reference, then click References > Reference summary

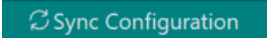
Setting up EndNote sync for auto backup

Syncing to a new EndNote online account

EndNote 20 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 20 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 configuration** in the groups pane 

2. Click **Sync Now**.

Starting from EndNote 20 will get you a full-service EndNote online account. Going directly to the website gets you only a basic account.

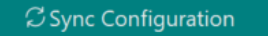
Have a EndNote online account already?

Type your existing EndNote online login and password into the EndNote Account Credentials fields and click **OK**

Don't have an EndNote online account?

- Click Sign Up
 - Type in your preferred email: it does not have to be your Swinburne email.
 - Complete the registration process.
- The Sync system will authorise your new account and add the details to EndNote 20. The library will automatically sync every 15 minutes and when you close the library. Change the settings in the Preferences > Sync screen if required.
 - If you have references in the library, you will be asked to make a compressed backup. Follow the instructions to do so.
 - 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.
 - EndNote 20 and EndNote online will now sync automatically. Please remember to regularly back up your Word documents.

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.
2. Open EndNote 20 on the second computer (Mac or Windows).
3. Click **File**
4. Click **New**
5. Create a new library.
6. Click the Sync configuration in the groups pane 
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.

Simple bibliographies

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.

Sometimes you might want to produce a bibliography or reference list quickly without using CWYW. We call this a simple bibliography and it is quick to generate and add to an existing document.

1. Make sure the citation style you wish to use is active in EndNote (see page 18-19)
2. Control-click (Win) or Command-click (Mac) to highlight the articles you want to use or
Add all of the relevant references to a group
Click one of the references within that group
Ctrl-A or Command-A to select all of the group
3. Click **Copy Citation** at the bottom of the summary pane.
4. Paste the list to your Word document. This will create a formatted bibliography without linking to EndNote.
The new bibliography may need its font or spacing to be changed to match the rest of the document.
5. Any corrections you make to the bibliography are only for this document.

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.

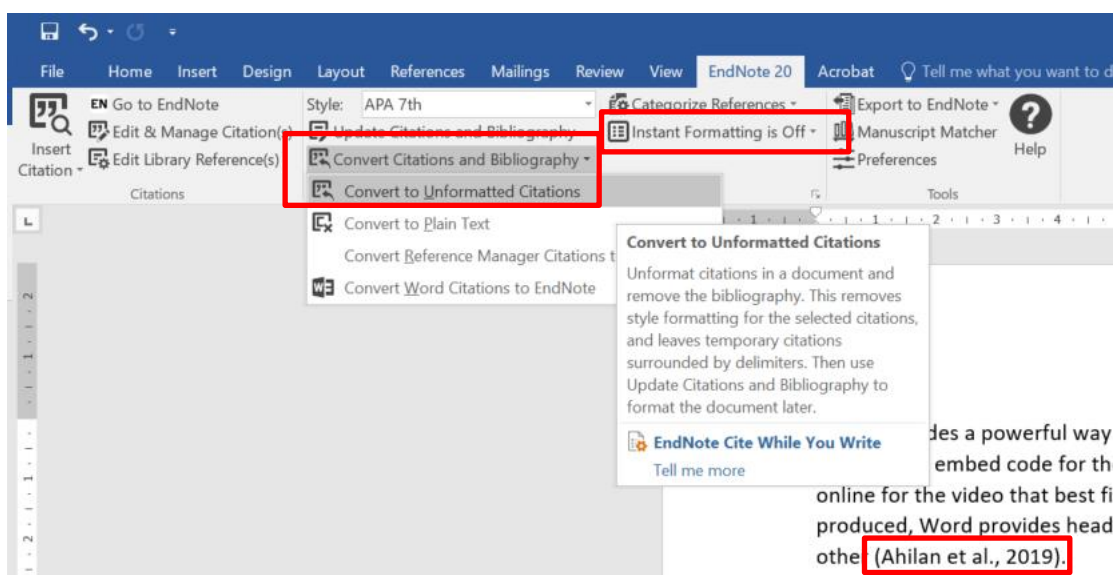
1. CWYW involves complex code that will be corrupted if you incorrectly move or delete those references. This can lead to bibliographies failing to format properly later, or the wrong references appearing in the paper.
2. It can also conflict with **Track Changes**, another feature of Word used frequently 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: place markers 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 20 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. If you are using a Mac, find your Convert options in the Tools dropdown of the tab.
- 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?

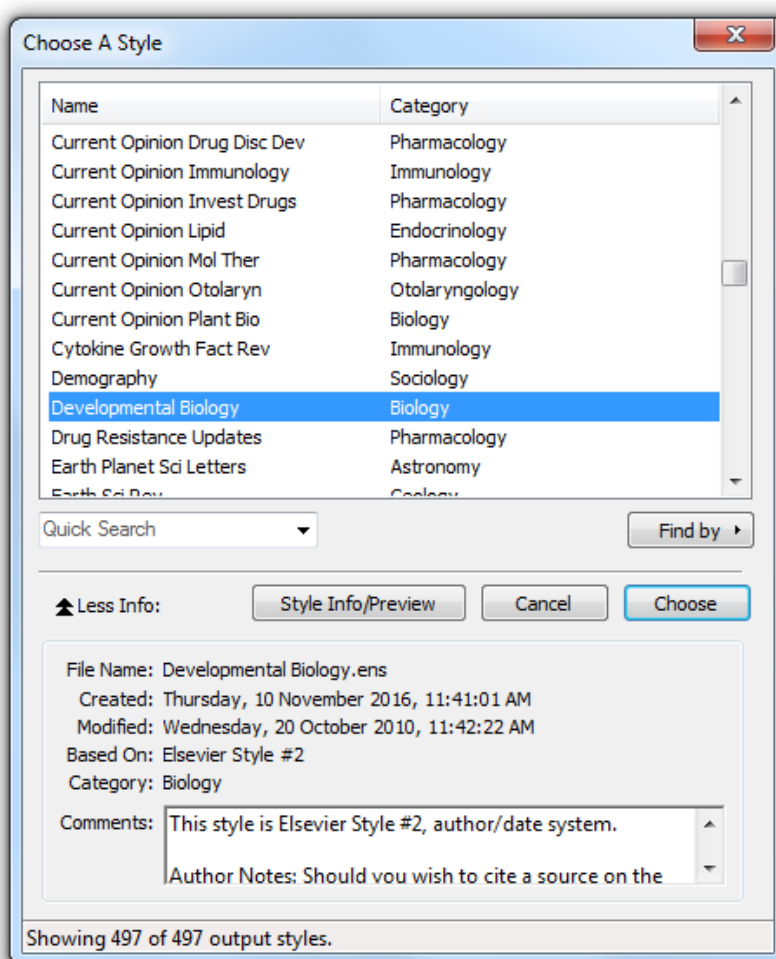
An output style determines how the selected reference will be formatted and displayed in Word. You will be able to concentrate on writing your essay or thesis, with the knowledge that EndNote will handle the correct punctuation and formatting of your references.

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 20 has almost 500 included styles.

Activating a style within EndNote

1. Click the **Current Style** drop down menu. (at the bottom of the Reference summary screen)
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. This is required for EndNote to locate new styles, as set in the Preferences.

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 <https://www.swinburne.edu.my/library/referencing/endnote-2.php>
8. Scroll to the **Swinburne Harvard Style output style** box.
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.

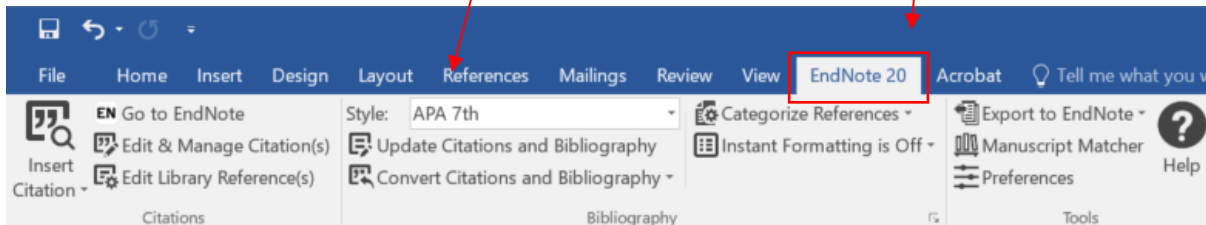
If you need a specialist journal style, for example the CSIRO's biology style, the EndNote website hosts thousands of styles.

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.

Changing a style within Word

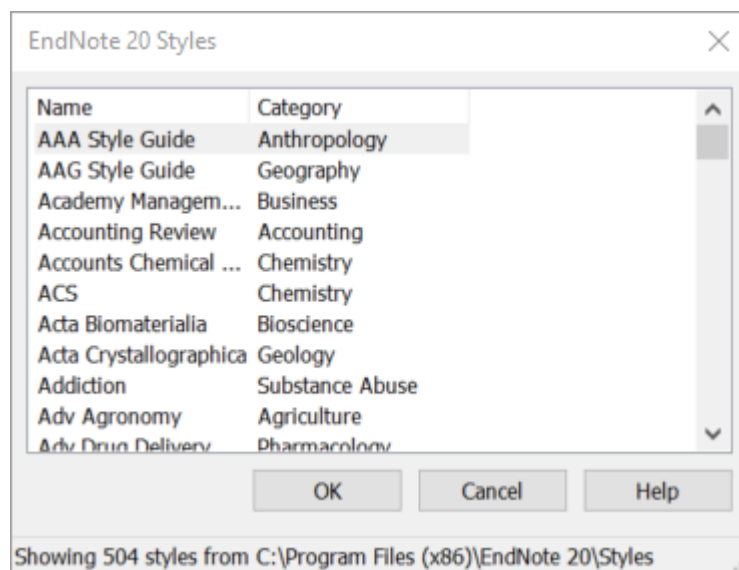
When you install EndNote 20 onto your computer, it automatically adds the necessary EndNote tab to the tools in your Word software. Click on the EndNote 20 tab.

The style shown is usually the style you activated in EndNote 20



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.

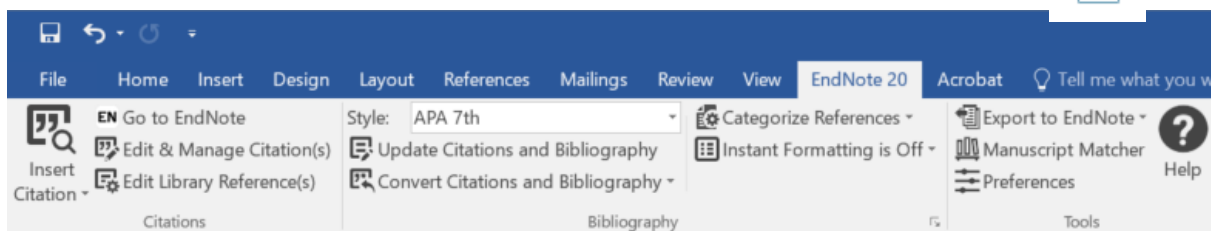


- Click **OK**.

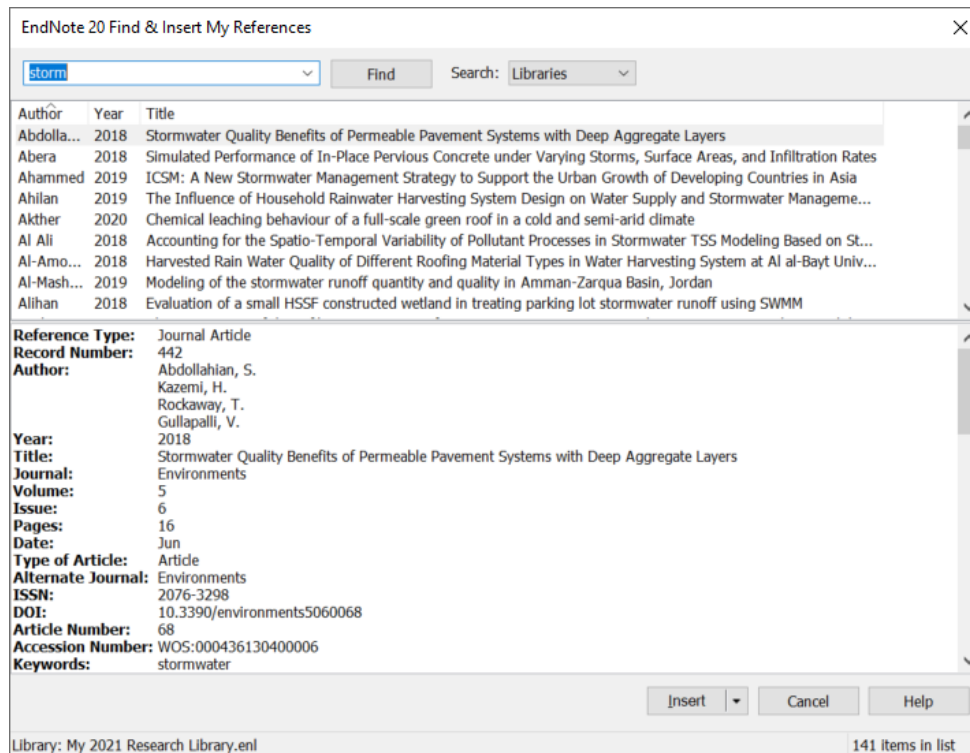
If you need to change the style of your bibliography at a later date, use the Current Style drop down menu on the EndNote 20 tab to choose an active style or click **Select another style** to activate a new one. EndNote 20 and Word 2016 will automatically reformat your document.

Using CWYW with Word: an exercise

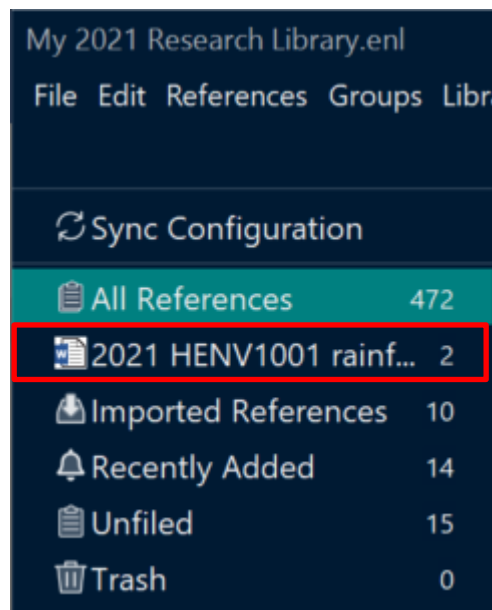
1. Make your EndNote library is open.
2. Open a new Microsoft Word document.
3. Type in the following code to generate some random sentences we can work with:
=rand(2,4)
4. Press **Enter**.
5. Click at the end of the first sentence.
6. Click **Insert Citation**.



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** or **Command** 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 20 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 customize 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.

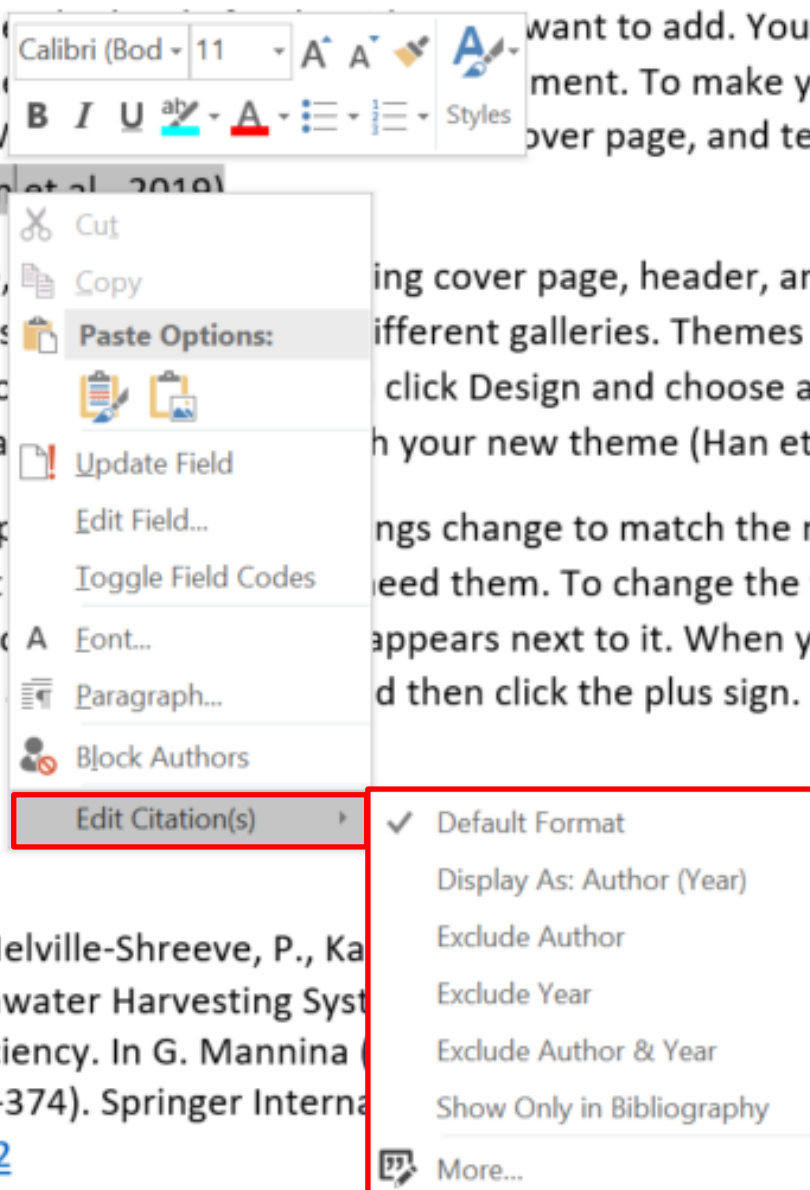
Video provides a powerful way to help you prove your point. When you paste in the video, you can also want to add. You can also online for the different ment. To make your doc produced, Web over page, and text box d

other (Ahilan et al., 2019)

For example, ing cover page, header, and sideb: the elements different galleries. Themes and styl document co click Design and choose a new Th SmartArt gra h your new theme (Han et al., 201

When you ap ngs change to match the new the buttons that eed them. To change the way a pi it and a butto appears next to it. When you work want to add d then click the plus sign.

Ahilan, S., Melville-Shreeve, P., Ka Rainwater Harvesting Syst Efficiency. In G. Mannina (369-374). Springer Internat [//doi.o](#)
1 62



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 <u>after</u> the text e.g. the discovery (as cited in Bender, 04) 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 <u>before</u> the text e.g. the discovery (Bender, 04 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**.

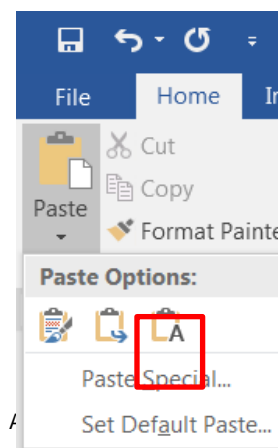
Safely copying text and references between documents

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. **Ctrl-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.

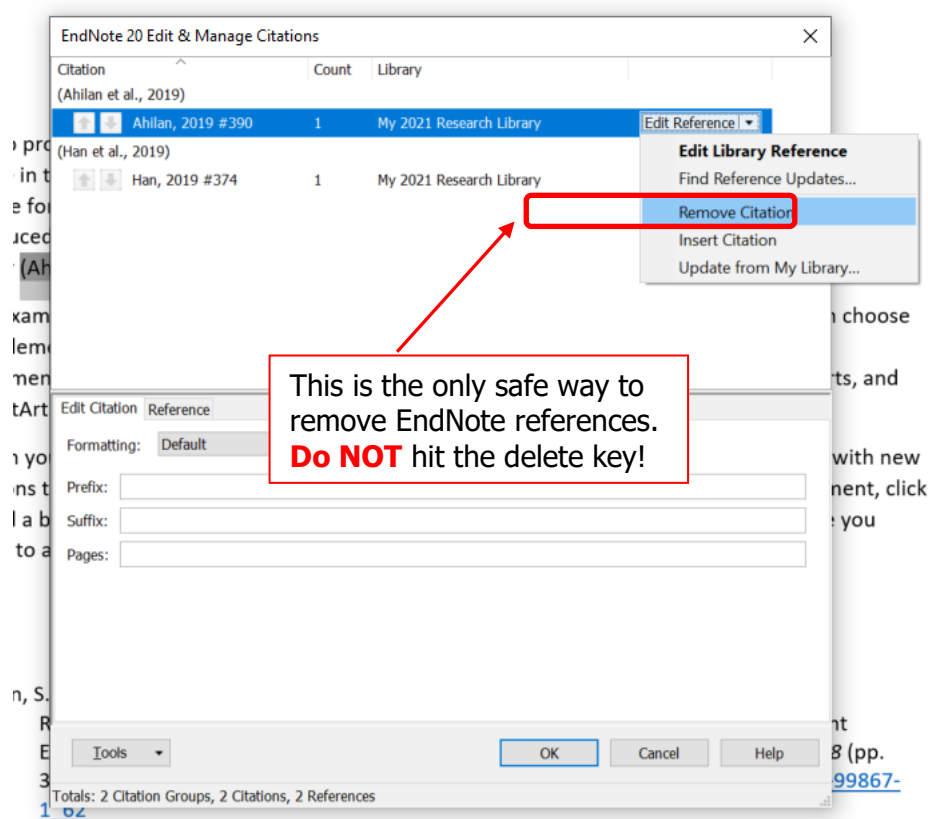


Safely deleting references

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 20 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**.

Where can I get help with EndNote?

- The Swinburne Library EndNote page:
<https://www.swinburne.edu.my/library/referencing/endnote.php>
Our training videos, training guides, the Swinburne output style are listed here.
- Clarivate's customer service <https://support.clarivate.com/s/> - their online support is quick (during US business hours) and comprehensive.
- You can download thousands of output styles at <https://endnote.com/downloads>
- View online tutorials at <https://clarivate.com/webofsciencegroup/support/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/>