

RMIT University Library

PhD Up! EndNote X9 & Word 2016 (365) Training Notes

Mac

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Learning Outcomes

By the end of this session, students will:

- understand what EndNote is and why to use it.
- be able to collect bibliographic information from a variety of sources.
- be able to organise and edit references.
- have an understanding of the Sync process.
- understand how EndNote integrates with Word.
- have an understanding of best practice use of Endnote in the research process

NOTE: Mozilla Firefox is the recommended browser

PART 1 - Creating an EndNote Library and adding References

Opening EndNote and creating a new library Exercise One

- 1) EndNote is already loaded on RMIT computers:

Open  **Finder > Applications > Endnote X9 > Endnote X9.**


- 2) Create a new EndNote Library (**File > New**) and save to desktop, H: drive or USB. It is best to save your EndNote library in the same location as your thesis documents.

Exporting records from LibrarySearch Exercise Two

Make sure that you have your EndNote library open.

1. Log in to LibrarySearch
2. Do a search on your topic. e.g. groundwater AND contamination AND “heavy metals”
3. Mark records you want to export from LibrarySearch by selecting the pin next to each record.



4. Click on the large pin  on the top right of the screen to **Go to My Favourites.**
5. In **My Favourites**, Click the tick box at the top of the list to mark all references. You can also

send references to Endnote individually by selecting the Export record icon. 

6. You'll now see 2 options next to **My Favourites**. Select the ellipsis icon. 

7. Select Export Record from the list. 

8. From the drop down Encoding menu, select the **UTF-8 option**. Press the **Download** button.

9. At the prompt for opening the **Primo_RIS_Export.ris** file, select ‘**Open with**’ and Choose: **Applications > Endnote X9 (folder) > Endnote X9** (program), and then **OPEN**. Tick the box for the “Do this automatically for files like this from now on” option. Click **OK** - this will send the records to the EndNote library. *Note: There may also be a prompt to select a library.*

Exporting records from Library Databases: Scopus Exercise Three

Major databases such as Science Direct, PubMed, ERIC, ProQuest, EBSCOhost, Scopus, JSTOR, IEEE, Web of Science and Emerald allow Direct Export of references into EndNote. Some examples of the words used by popular databases include: **Send to**; **Export citation(s)**; **Export**; **Export/Save**; **Save**; **EndNote [button]**.

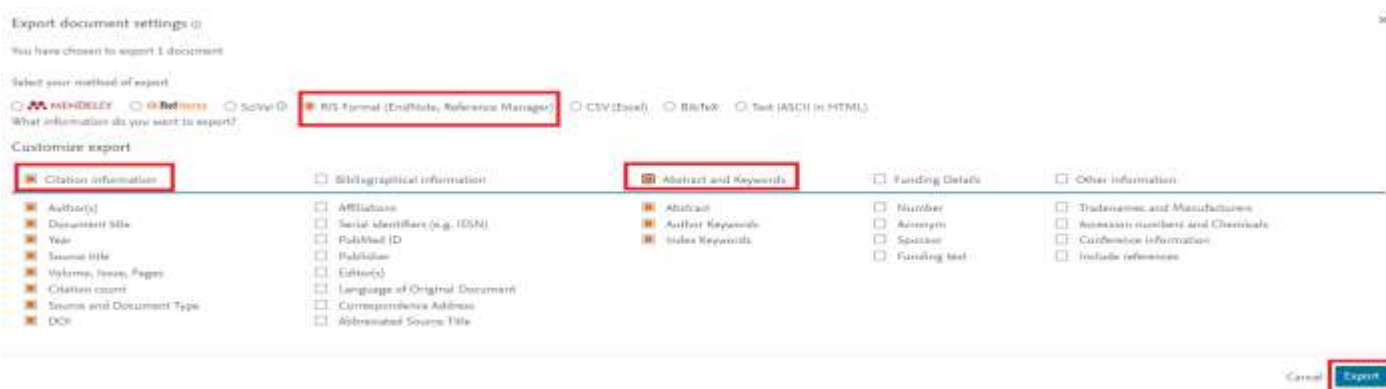
1. Ensure your EndNote Library and the RMIT University Library homepage are both open.
2. From the RMIT Library homepage select **Databases A-Z**.
3. From the **Popular Databases** drop-down menu select **Scopus**.
4. Do a search on your own topic.
5. Select the reference(s) you would like to export by selecting the box next to the corresponding number.




6. Click **Export**.



7. From the Export document settings window, select **RIS Format (EndNote, Reference Manager)**.
Note: Citation Information will be selected within the Export document settings window. Other options (e.g. **Abstract and Keywords**) can be selected.
8. Click **Export** to start saving.



9. At the prompt for opening the **scopus.ris** file, select '**Open with**' and Choose: **Applications > Endnote X9 (folder) > Endnote X9** (program), and then **OPEN**. Tick the box for the "Do this automatically for files like this from now on" option. Click **OK** - this will send the records to the EndNote library. *Note: There may also be a prompt to select a library.*

Note: Scopus will remember these settings for the session, so next time you export you will see RIS export . Sign in to Scopus to save your Export selection for future sessions.

Tip: The record(s) will appear in the **Imported References** folder within your EndNote library. It also appears in the **All References** (master) folder. Each time you export a record(s), the previous record(s) will be replaced with the new one(s) within the **Imported References** folder, but will still remain in the **All References** folder.

Exporting records from Library Databases: ProQuest

1. Ensure your EndNote Library and the RMIT University Library homepage are both open.
2. From the RMIT Library homepage select **Databases (under Find Resources, By Format)**
3. From the **Popular Databases** drop-down menu select **ProQuest**.
4. Do a search on your own topic.

Note: The **Advanced Search** options are often useful – e.g., to search within a specific part of an article.

5. Select the references you would like to export by ticking the box next to the corresponding number. To select a page of references, tick Select 1-20.



6. Select **ellipsis (three dots)** – see image above) and then select **RIS Endnote, Citavi, etc**

MOST POPULAR



Cite



Email



Save to My
Research






RIS
EndNote,
Citavi, etc.

7. The **Export/Save box** will appear. Select **Continue**.
8. At the prompt for opening the **ProQuestDocuments (dated).ris** file (e.g. ProQuestDocuments-2017-04-03.ris), select '**Open with**' and Choose: **Applications > Endnote X9 (folder) > Endnote X9** (program), and then **OPEN**. **Tick** the box for the "Do this automatically for files like this from now on" option. Click **OK** - this will send the records to the EndNote library. *Note: There may also be a prompt to select a library.*


Reminder: The record(s) will appear in the **Imported References** folder within your EndNote library. It also appears in the **All References** (master) folder. Each time you export a record(s), the previous record(s) will be replaced with the new one(s) within the **Imported References** folder, but will still remain in the **All References** folder.

Exporting records from Google Scholar Exercise Four


1. Navigate from the Library homepage to **Google Scholar (in Find resources, Other resources section)**. At the prompt, **Login** with your **Student or Staff number** and **Password**.
2. Click on the **Sign in** button  (top right of screen) and log in with your **RMIT email address** and **Password**. You're now signed in to your Google Scholar account -- you can **Sign Out** (top right of screen).
3. When you log into Google Scholar for the first time, you need to enable your Scholar library. Click on **My library** link  at the top of the screen.


4. From the Getting Started page, click the enable button  to enable your Scholar library

Note: Steps 3 and 4 (enabling your Scholar library) only needs to be completed once - the first time you sign in to Google Scholar using your RMIT email address.

5. Search on a topic in Google Scholar. e.g. "global warming"
6. Click the  **Star icon** (save option) below each required reference.

Tip: When a reference has been saved, the **Star** icon is changes to a blue colour. You can click on Saved option to view the reference's citation details. The reference is also placed in the **My library** option (on the right hand side of the screen).


7. From the **My library** option (on the left hand side of the screen) tick the references you want to export into your EndNote Library.
8. Select **EndNote** from the drop down **Export** button  at the top of the screen.
9. At the prompt for opening the **scholar.enw** file, select '**Open with**' and Choose: **Applications > Endnote X9 (folder) > Endnote X9 (program)**, and then **OPEN**. **Tick the box** for the "Do this automatically for files like this from now on" option. Click **OK** - this will send the records to the EndNote library. *Note: There may also be a prompt to select a library.*
10. Your Google Scholar references have now been exported into your EndNote library

Tip: An alternative method if you do not sign into Google Scholar with your RMIT email address or enable your Scholar library, is to use the **Cite** option  below each record and select **EndNote** or Select the '**Settings**' option and choose **EndNote** for the '**Show links to import citations into**' option under the **Bibliography Manager** heading and then select click the **Import to Endnote** option below the required reference.

Notes:

- Remember to check each record to make sure that all information is correct (see minimum fields list on pp. 10 -11). You can make quick corrections to fields in the **Reference** section.



- You can add **Ratings** and **Research Notes** to identify important references (within the **Reference** section).
 - You can view full-text PDFs in the **Attached PDFs** tab.
- 
- Instructions on attaching PDFs can be found on pp. 12 - 13 in this document

Capturing Web references using EndNote basic.

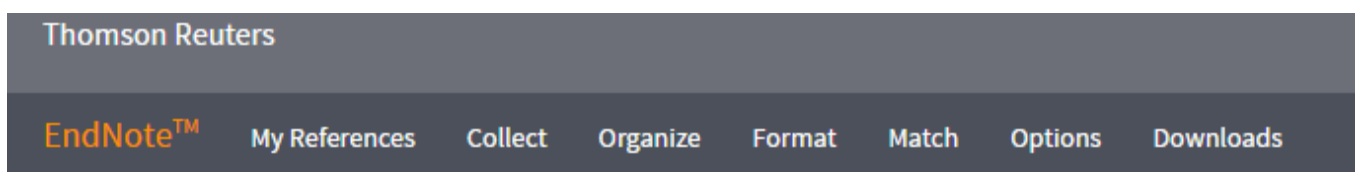
You can create a new reference for webpages, blogs and other research materials.

****You need to have an *EndNote basic* account before you can capture webpage information.****

See the instructions in the **Endnote X9 and Syncing your EndNote Library** handout to set up your account.

First, install the Web Capture app for your browser.

- Go to <http://www.myendnoteweb.com> and login to your account.
- Scroll across the top of the screen and select Downloads



- Drag and drop the Capture Reference icon into your bookmarks toolbar



- Find a webpage you want to capture into EndNote Web. Make a note of some of the details, such as the author name, and the title of the page. Now click **Capture Reference**.

A pop-up window opens. EndNote Online imports any publication data it can detect in the webpage.

- Make sure the **Reference Type** says **Webpage**.

6. Type in any other useful reference information for this item.
7. At the top of the pop-up box, tick the radio button for EndNote, then click the **Save to** button.

Capture New Reference

Save To my.endnote.com EndNote

Bibliographic Fields | Optional Fields

Groups: Add or remove

Bibliographic Fields: At least one of the fields must be filled out.

Reference Type: Web Page ▼

Author: Australian Bureau of Statistics

Use format Last Name, First name. Enter each name on a new line.

Title: Labour Force

Year: 2016

Series Editor:

Series Title:

Place Published:

Publisher: ABS

Access Year: 2013

Access Date: 1 March

Description:

You can add in additional information. See the minimum fields listed on page 10.

For webpages, add in the **Access Year** and **Access Date**. Note: The webpage title and the URL address will be automatically captured.


The new reference has been added to your **Imported References** group in EndNote.

Sorting and locating references in your EndNote library

You can sort each column alphabetically or by date, by clicking on the top of the column.

Author	Year	Title	Rating	Journal	Last Updated	Reference Type
--------	------	-------	--------	---------	--------------	----------------

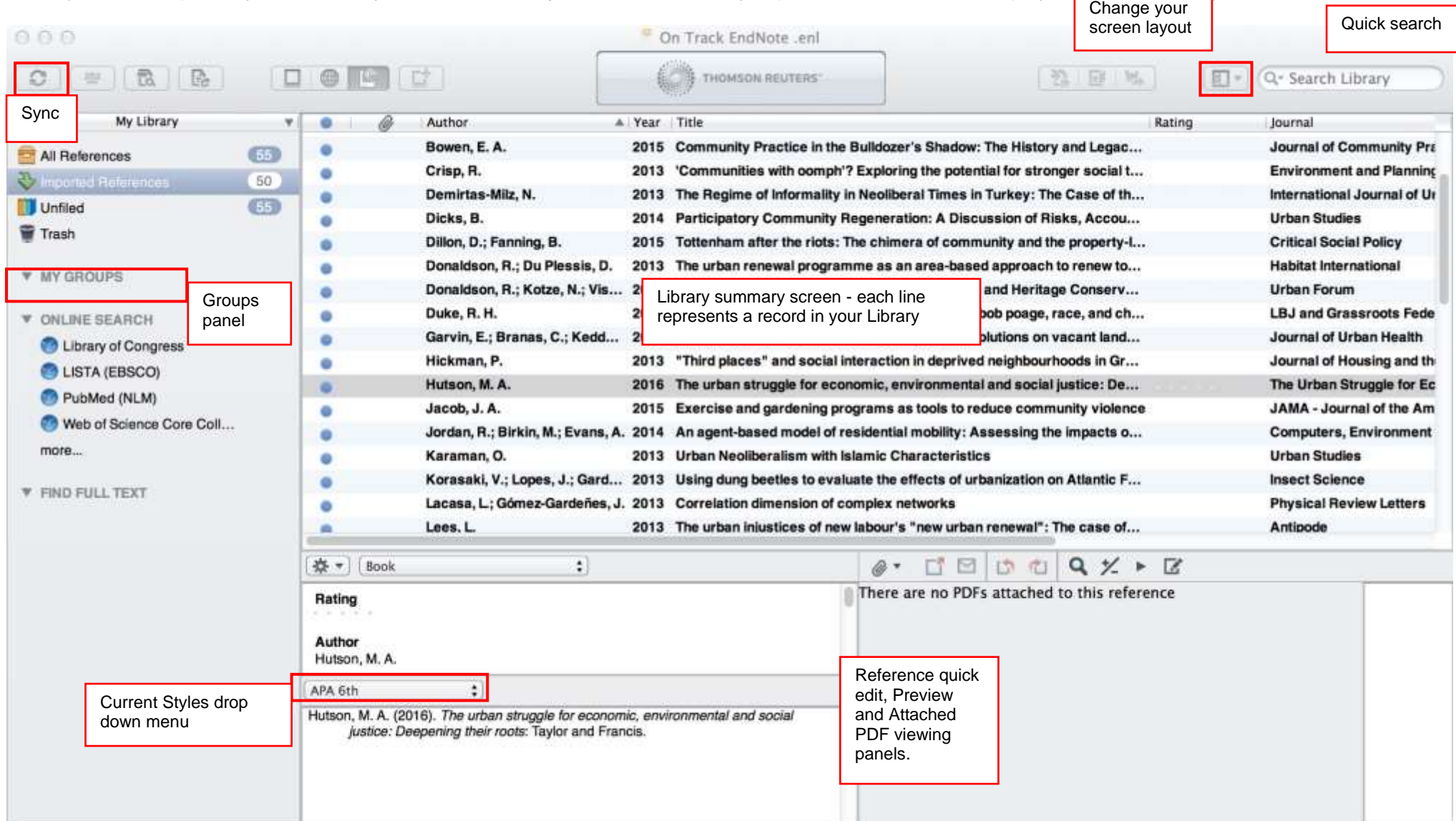
You can also add new columns by right clicking on the top of any column and choosing from the list that appears eg Record Number, Keyword or Research Notes.

You can search within the EndNote Library via the Search Library box on the toolbar,  or by clicking on Tools – Search Library (or Cmd F) to conduct a more detailed search.



Looking at your EndNote Library

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


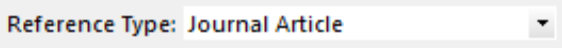



The screenshot shows the EndNote Library window with the following components:

- Sync button:** Located in the top-left toolbar.
- Quick search:** A search bar in the top-right corner.
- Change your screen layout:** A button in the top-right toolbar.
- Groups panel:** A sidebar on the left containing sections for "MY GROUPS", "ONLINE SEARCH", and "FIND FULL TEXT".
- Library summary screen:** A table of references with columns for Author, Year, Title, Rating, and Journal.
- Reference quick edit, Preview and Attached PDF viewing panels:** A detailed view of a selected reference at the bottom, including a "Rating" field, "Author" field, and a "Current Styles drop down menu" showing "APA 6th".

Author	Year	Title	Rating	Journal
Bowen, E. A.	2015	Community Practice in the Bulldozer's Shadow: The History and Legac...		Journal of Community Pre
Crisp, R.	2013	'Communities with oomph'? Exploring the potential for stronger social t...		Environment and Planning
Demirtas-Milz, N.	2013	The Regime of Informality in Neoliberal Times in Turkey: The Case of th...		International Journal of Ur
Dicks, B.	2014	Participatory Community Regeneration: A Discussion of Risks, Accou...		Urban Studies
Dillon, D.; Fanning, B.	2015	Tottenham after the riots: The chimera of community and the property-l...		Critical Social Policy
Donaldson, R.; Du Plessis, D.	2013	The urban renewal programme as an area-based approach to renew to...		Habitat International
Donaldson, R.; Kotze, N.; Vis...	2013	and Heritage Conserv...		Urban Forum
Duke, R. H.	2013	bob poage, race, and ch...		LBJ and Grassroots Fede
Garvin, E.; Branas, C.; Kedd...	2013	solutions on vacant land...		Journal of Urban Health
Hickman, P.	2013	"Third places" and social interaction in deprived neighbourhoods in Gr...		Journal of Housing and th
Hutson, M. A.	2016	The urban struggle for economic, environmental and social justice: De...		The Urban Struggle for Ec
Jacob, J. A.	2015	Exercise and gardening programs as tools to reduce community violence		JAMA - Journal of the Am
Jordan, R.; Birkin, M.; Evans, A.	2014	An agent-based model of residential mobility: Assessing the impacts o...		Computers, Environment
Karaman, O.	2013	Urban Neoliberalism with Islamic Characteristics		Urban Studies
Korasaki, V.; Lopes, J.; Gard...	2013	Using dung beetles to evaluate the effects of urbanization on Atlantic F...		Insect Science
Lacasa, L.; Gómez-Gardeñes, J.	2013	Correlation dimension of complex networks		Physical Review Letters
Lees, L.	2013	The urban iniustices of new labour's "new urban renewal": The case of...		Antipode

Manual input of records

1. Create a new reference **References > New Reference** or click 
2. The default setting for new references is Journal Article. You can change the reference type using the **Reference Type** drop-down menu (top left corner) – e.g., journal article, book, web page, etc. 
3. After you have entered the details click on the small red dot at top left, to close  or **Command + W**. If a pop-up asks you if you want to save changes to the record, click Yes/OK).

Tips:

- List author last name (family/surname) first and followed by a comma – e.g. Benton, Tim
- Write organisation names in full, followed by a comma – e.g. RMIT University,
- Enter each author name on a separate line.
- Space between author initials.
- Full stop after each author initial – e.g. Smith, J. O.
- Sentence case for journal article or book titles e.g. Nanotechnology: Photons make light work.
- Add some of your own keywords for searching later e.g. specific wavelengths

Minimum fields required for displaying a complete reference in **MOST** styles.

Note: Refer to the Library's Referencing Guides for more details.

<http://www1.rmit.edu.au/library/referencing-guides>

Book

- Author
- Title
- Year
- Publisher
- City
- Edition (If not the first)

Journal Article

- Author
- Title
- Journal
- Volume
- Issue
- Year
- Pages
- DOI – Digital Object Identifier (if applicable)

Electronic Article

- Author
- Title

- Year
- Periodical Title (Journal title)
- Volume
- Issue
- Pages
- Date accessed
- URL (or database name)
- DOI – Digital Object Identifier (if applicable)

Electronic Book

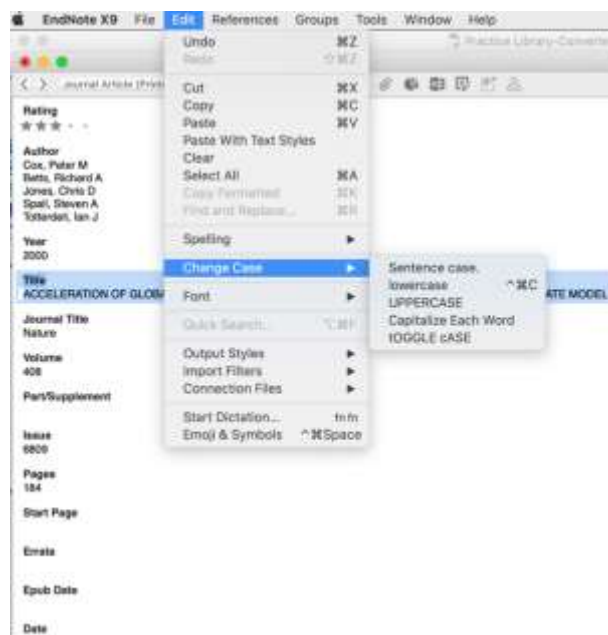
- Author
- Title
- Publisher
- Year (copyright date)
- Date accessed
- URL (or database name)

Web Page

- Author or producer of site (personal or corporate)
- Title (of site)
- URL
- Year (date of publication or of last update)
- Access Date (date you accessed the site)

Changing capitalization in the title field

1. This is the only change where you need to double click onto a reference to open it in a new screen.
2. Highlight the text
3. Select **Edit** from the menu, and then **Change Case**.
4. Select your preferred option.

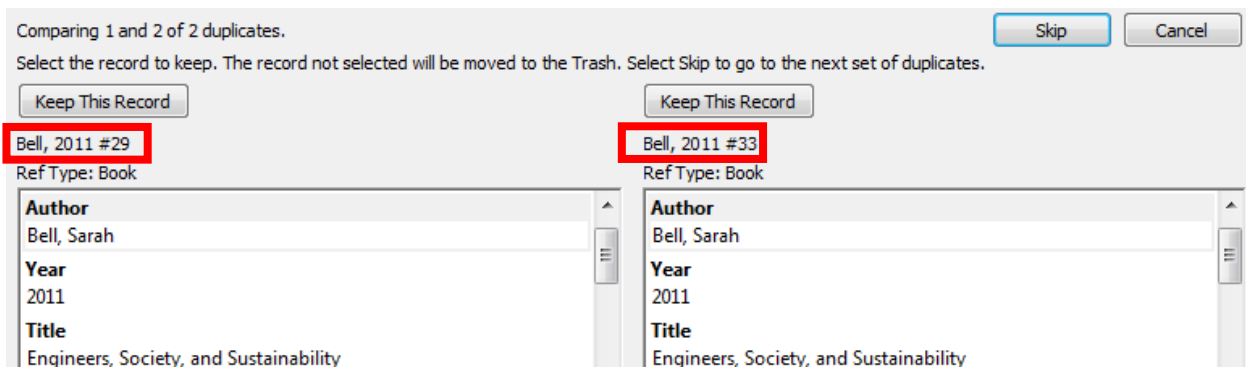


5. Click on the small red dot at top left  or select **Command + W** to save the changes and close the window.

Duplicate references

1) You can remove **duplicate** references by selecting **References > Find Duplicates**.

Check the completeness of the record you wish to keep e.g. Does it have full text attached? If you have already inserted one of these records as a citation in your Word document, do not delete it in your EndNote Library, or the citation will disappear from your document. To check which record you have used in your Word Document, note the record numbers and see page 22 for instructions on un-formatting the citations in your Word document to identify the record you have inserted.



Adding full text Exercise Five

You can add full-text to your EndNote Library in different ways.


1. Adding an existing (saved) PDF to the record in your EndNote Library

- The easiest way to add an existing saved pdf file to a record in your library is to drag and drop the pdf file onto the reference.

OR

- Control click on a selected reference in your EndNote Library.
- Click on **File Attachments > Attach File > [select file] > Open**.

OR


- Highlight a Reference and click the Paperclip tab 
- Select **File > Open**.

2. Using Find Full Text to attach PDFs to records in your EndNote Library

- Highlight the reference for which you want the full-text (Select multiple references from your EndNote library by holding down **Cmd** while clicking on the required references OR **Shift** and **click** to select a continuous range of references), then select either:

- **References > Find Full Text > Find Full Text**

OR

- Click on  on the toolbar

Endnote searches for the PDF files and where available, attaches them to your references

Note: If you are Off Campus, you will need to connect to the RMIT network

- Go to **EndNote X9 > Preferences > Find Full-Text**.
- Within your **Find Full Text** options:
 - **OFF CAMPUS:** *Authenticate with URL* > [change 'Authenticate' URL to: <https://login.ezproxy.lib.rmit.edu.au/login?url=http://scholar.google.com/>] Click **OK**.

3. Adding a folder of existing PDFs to create new records in Endnote

- File > Import ...**
- Select Folder or File from existing location.



- Leave **Import Option** as **PDF File or Folder**
- Change **Duplicates** to **Discard Duplicates**
- Click **Import**.

Note: This process relies on the DOI (Digital Object Identifier) of articles to create records in EndNote. If a PDF was not created in a format that allows EndNote to distinguish between the different elements of the citation (e.g. a scan, or an older PDF) then the reference created will have mostly empty fields that you will need to fill in using data from the PDF.

4. Automatically import PDF files

In EndNote, click **EndNote X9 > Preferences > PDF Handling** and tick **Enable automatic importing**, then select your Download folder > **OK**

While you are researching, download any new PDFs you find to the Downloads folder. EndNote will automatically import them. Where possible, EndNote will find and add the basic publication information to the new reference via the Digital Object Identifier (DOI).

Tip: Have EndNote create more informative PDF names.

If you add a file such as <1-s2.0-S0305748812001399-main.pdf> to your auto import folder, EndNote can attempt to rename the PDF to an author-date-title format e.g. Bendall-2013-The public life of maps.pdf.

You can also set your own custom renaming protocol. Click **Edit > Preferences > PDF Handling** > tick your preference and **OK**

Tip: Ask EndNote to find any missing publication information.

If the PDF was added and only lists its file name and a DOI, EndNote can try to find and add the base publication information via the DOI.

1. Click the reference
2. Click **References > Find Reference Updates**
3. If anything can be found you will be presented with the additional information. Fill in blank fields or copy across additional information and save the changes.

Note: sometimes EndNote matches the accession numbers from different databases and suggested a different article. Click **Skip**

Groups Exercise Six

Groups make it easy to organise a large library into folders to manage references or use a subset of references for a paper or chapter. A group simply points to a subset of references that already exist in the library. They are a **COPY** only of selected references from your **All References**.

1. Create a Group – manually add records to the Group:


- a) Control + click **My Groups** or from the menu **Groups > Create Group** and name it,
 - a. e.g. a topic you are researching, or Literature Review or Chapter 1
- b) Drag and drop some references into your Group. You can also Control + click on a Reference and select **Add References To**.

2. Create a Smart Group - records matching your terms are automatically added to the Group:

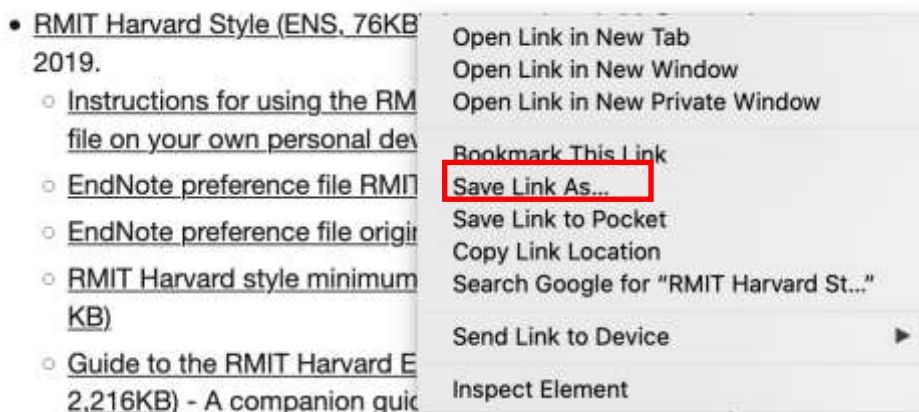
- a) Control + click on **My Groups > Create Smart Group** or from the menu **Groups > Create Smart Group** and name it.
- b) Select **Any Field > Contains** and then enter a term that commonly appears in your references (eg in the title, abstract or keyword fields)
- c) This creates a group that will automatically add references if they contain your chosen terms.



Formatting (changing) styles in EndNote Exercise Seven

- Reference styles can be changed in EndNote **AND** in your Word document. The style selected should be the same in both.
- From **Style** drop-down menu, **Annotated** click **Select Another Style**, select required style e.g. APA 6th or IEEE or other, and select **Choose** to add it to your list of styles.
- Click on the layout button  to ensure that a **Preview** window is visible. This allows you to check your reference.
- Extra styles can be downloaded via **Edit > Output styles > Open Style Manager** then click on **Get More on the Web**.

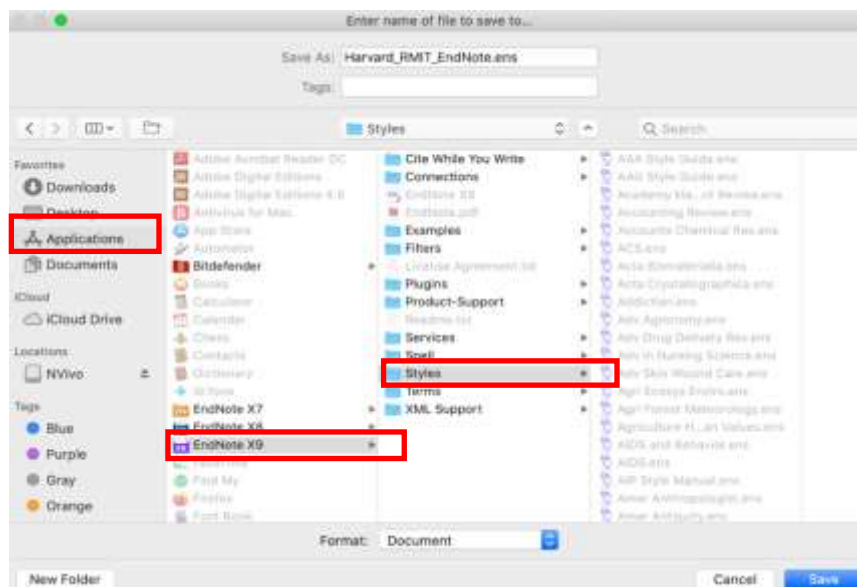
Note: RMIT students using the **RMIT Harvard** referencing style and using EndNote on a personal computer, will need to download the **RMIT Harvard style (Harvard_RMIT_EndNote)** available from the Library's EndNote Desktop webpage under the **Styles expanding heading** <https://www.rmit.edu.au/library/research/endnote-managing-your-references/endnote-desktop>



To download the **RMIT Harvard style (Harvard_RMIT_EndNote)** style:

- Navigate to the Library's EndNote Desktop webpage <https://www.rmit.edu.au/library/research/endnote-managing-your-references/endnote-desktop>. Click on the **plus symbol (+)**, next to the Styles heading
- Right-click the RMIT Harvard style download link and select **'Save link as'**

- c) Change the download location to **Applications > EndNote X9 > Styles** and select **Save**.



Saving / backing up your EndNote library

You can save your complete library (including the .DATA folder and all of its contents including images and .PDF files) to a single **compressed** copy in order to back up your library, transfer it to a non-RMIT computer or send a copy to a colleague. The .DATA folder is **important**, even if you are not storing .PDFs in it, so compressing the library allows you to email it without losing recent updates.

To save to a compressed library file:

- Open the library.
- From the **File** menu select **Compressed Library** then **Create**.
- Choose the folder or drive where you want to save the library. It will be a file with the extension .enlx (not .enl).

Setting up EndNote basic to sync and for sharing your EndNote library

Please see the handout 'Setting up EndNote sync for collaboration' for details on how to sync and/or sharing your EndNote Library

EndNote X9 gives you the ability to automatically sync your Endnote library across two or more computers via EndNote basic <http://www.myendnoteweb.com/>.

You can then share the entire library via EndNote X9 or just a group (or selected groups) via EndNote basic with fellow researchers.

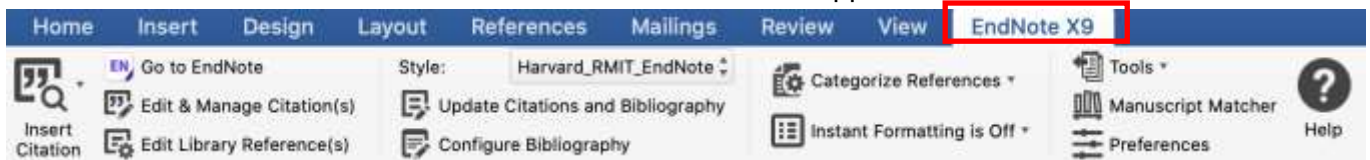
- You can sync one library with up to 50,000 references, 5000 groups and unlimited attachments.
- Please only do this on your own computer.

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 RMIT computers.

PART 2 – Using EndNote with Word – Cite While You Write (CWYW).

Please note: These instructions have been written for Endnote X9 and Word 2016 (365)

To work with EndNote and Word, you must **FIRST** open your EndNote Library, **THEN** Word. Click on the tab **EndNote X9** in Word for the toolbar to appear.





The style shown is usually the style you activated in EndNote X9. If not, see page 20 for instructions on how to change it.

Inserting a citation in Word Exercise Eight


1. Make sure the EndNote library that contains the references you wish to cite is open. For the example and exercise below, we will use our new library.
2. Open a new Microsoft Word 2016 (365) document.
3. Type in the following code to generate some random sentences we can work with:
=rand(2,4)
4. Press **Enter**.

Endnote allows you to insert references in a number of ways:

Inserting a citation from EndNote:

1. In Word, select where you would like to insert the citation in the text.
2. Select  **Go to EndNote** from the Endnote x9 toolbar.
3. In EndNote, highlight the reference and select **Insert Citation**  .
4. Reference will be inserted into the text of the Word document, and a Reference List or Bibliography will be generated at the end of the document.

Inserting a citation from Word:

1. In Word, select where you would like to insert citation in the text.
2. From the EndNote toolbar in Word, click on **Insert Citation** icon .
3. From the pop up box, type an author's last name or keyword. Press **Return**
4. EndNote will list the matching results
5. Select the reference(s) you require and click **Insert**
6. Reference(s) will be inserted into the text of the Word document and a Reference List or Bibliography will be created at end of the document.

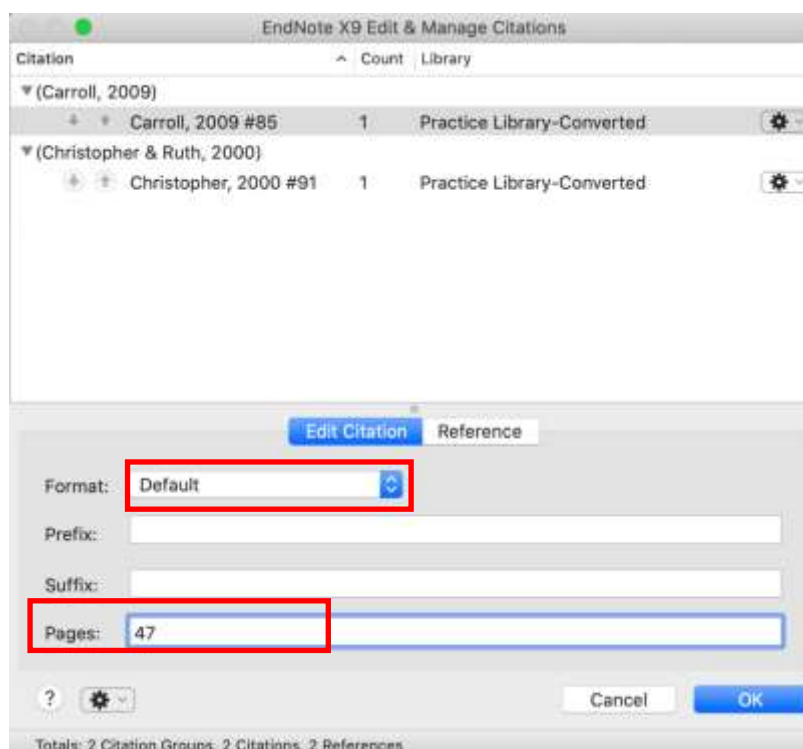
Inserting multiple citations:

Select multiple references from your EndNote library by holding down **Command** while clicking on the required references (OR **Shift** and click to select a continuous range of references). Then return to your Word document and select **Insert Selected Citation(s)** option from the drop-down button next to **Citations** on the Endnote X9 toolbar.

Editing a citation in Word Exercise Nine

Once you have inserted a citation, you should not edit it directly in Word. If you make any changes within the brackets of a citation they will disappear when you re-format the bibliography.

1. In Word, click on the in-text citation. This will automatically shade the citation in grey.
2. From the EndNote toolbar in Word, click the **Citations** button, and select **Edit & Manage Citation(s)**.
3. From the **Format** drop-down menu, select your chosen option eg **Exclude Author** or **Exclude Year**.
4. Enter page number in the **Pages** field. Page numbers will only appear if style allows it, e.g. APA 6th, Harvard ed6.v9 / Harvard_RMIT_EndNote.
- 5.



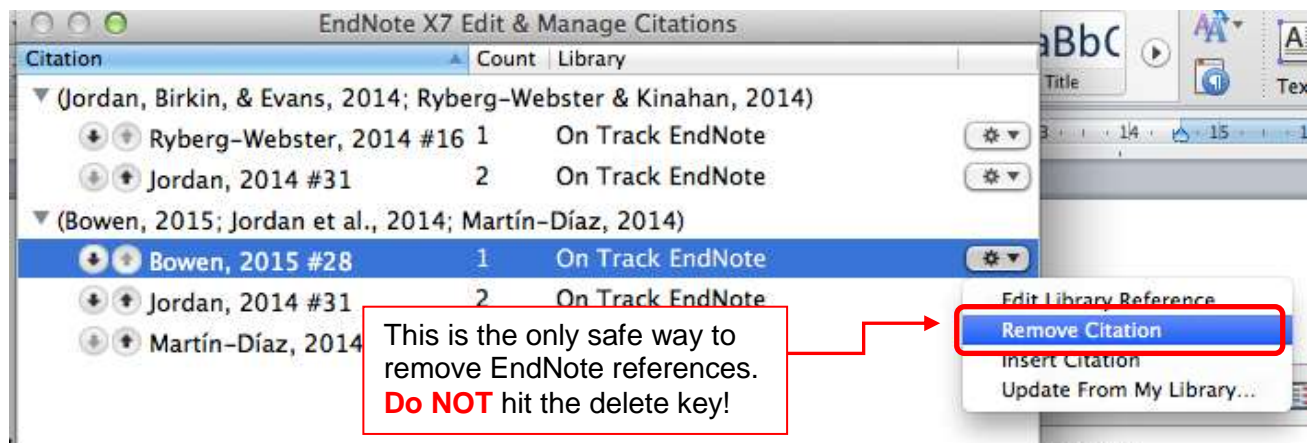
Note: If the style is not set up to show information from the Pages box (most of the journal output styles are not) then you add page numbers in the **Suffix** field, including punctuation. e.g. , p. 25 (a space before the comma is necessary).

Removing a citation in Word Exercise Ten

Please **do NOT** delete unwanted citations by highlighting them and hitting the delete key.

If you wish to remove a citation completely:

1. Click on the citation to select it.
2. Select **Citations > 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.
4. Ensure the citation you wish to remove is highlighted.
5. Select the icon to the right of the reference.
6. From the dropdown menu select **Remove Citation**.



7. Click **OK**.

Special characters and character sets

Special characters can be entered into Endnote using any of these text-entry methods:

1. To type an accented or alternative version of a character, hold the key down until its alternative characters are displayed
2. From the list displayed, click the character you want to use

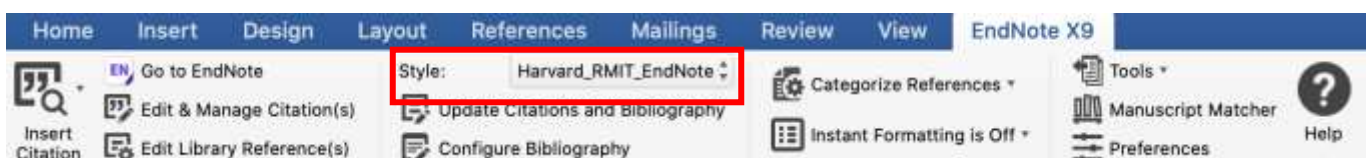


Note: If you edit a reference in EndNote, the changes you make won't be reflected in your Word document until you update your Bibliography. In the EndNote tab in **Word**, click on **Update**

Citations and Bibliography

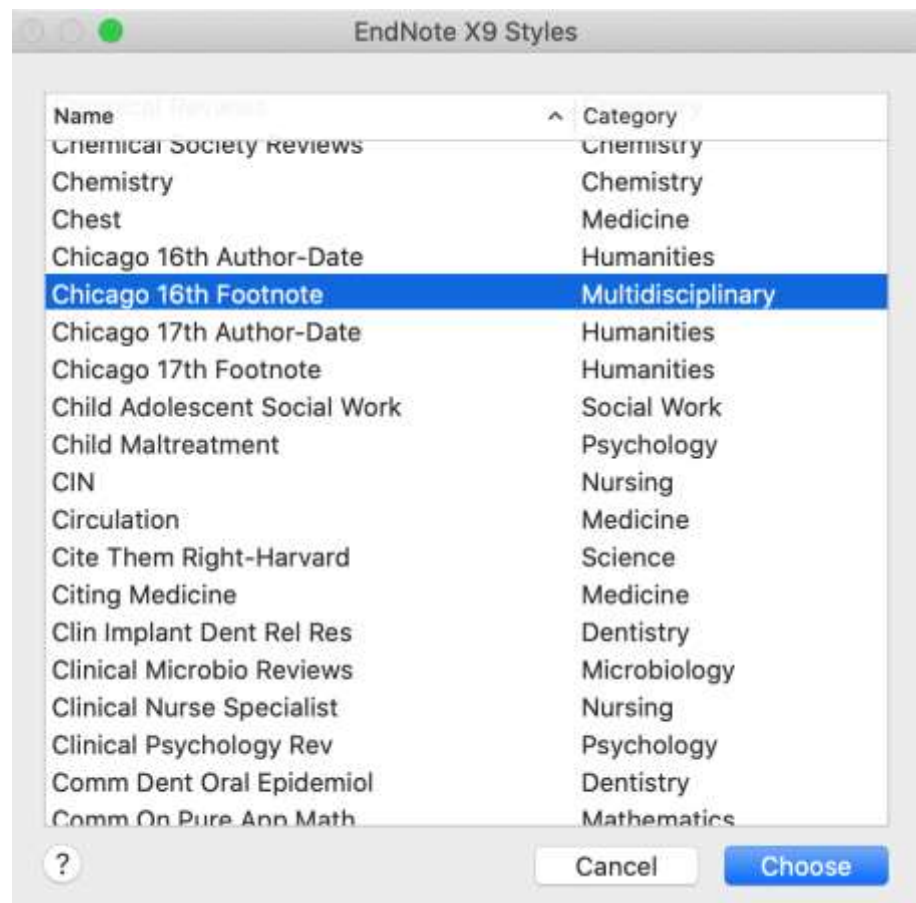


Changing a style within Word 2016 (365):



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

1. Click in the **Style** box.
2. Click **Select another style** from the menu.
3. Click on the first style, then type the first couple of letters of the style name to jump down the list.
4. Select the style you wish to activate.

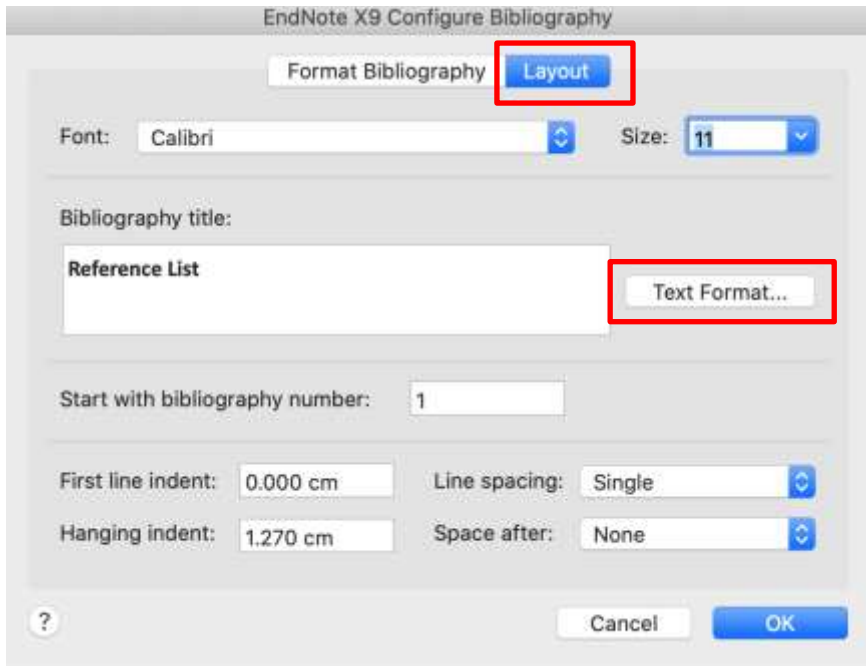


5. Click **Choose**.
6. Your document automatically reformats to reflect the new style.

Formatting your Bibliography Exercise Eleven

Changes to the layout (font, line spacing etc.) of in text citations are handled by Word. If you want to add a title or make changes to the font or line spacing of your bibliography, you need to use the EndNote tools.

1. From the EndNote tab in **Word**, select **Configure Bibliography**
2. This will open the **Format Bibliography** tab
4. Click the **Layout** tab to check or modify settings.



5. You can change the font size and style of your bibliography.
6. The default bibliography title is **Reference List**. This title can be changed. To make changes to the size and style of the font, click **Text Format**.
7. You can change the line spacing between references or alter the hanging indent.
8. When you have made all required changes, click **OK** to reformat the bibliography.

Creating a standalone bibliography Exercise Twelve

You can create a bibliography without an associated paper using the **Copy Formatted** method.

1. Open your EndNote library and check you have the appropriate **Output Style** selected.
2. Highlight to select the desired references.
3. From the **Edit** menu, choose **Copy Formatted** (or **Command K**) to copy the references.
4. Open a Word document and **Paste** the references into Word. This generates a **text** document with no EndNote coding. Use the Word options to make any changes to the Bibliography.

Common problems with EndNote and Word (Mac)

My formatted bibliography is permanently shaded, how do I get rid of this?

This is **field shading**. To fix the problem:

1. In **Word**, go to **Word > Preferences > View**.
2. Under the **Show in Document** section > **Field Shading**.
3. There are three options: choose **When selected** > **OK**.

Field shading: **When selected** ▼

- Click on the small red dot at top left  or select **Command + W** to save the changes and close the window.

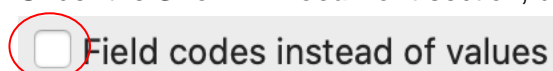
Strange codes in your document

Sometimes, instead of seeing your regular in-text citations, there is a strange code, which looks something like:

```
ADDIN EN.CITE <EndNote><Cite><Author>Burwell</Author>
<Year>2005</Year><RecNum>39</RecNum><record><rec-number>39</rec-number " ...
```

What you are seeing is the hidden field codes in Word. This is the hidden code EndNote uses to hold the reference information for your formatted citations. To fix the problem:

- In **Word**, go to **Word > Preferences > View**.
- Under the **Show in Document** section, uncheck the **Field codes instead of values**



- Click on the small red dot at top left  or select **Command + W** to save the changes and close the window.

This setting is a universal setting for Word, so making this change should fix any documents that are currently displaying field codes.

PART 3 - EndNote and Word – Best Practice for research

This section contains some useful tips for working with your documents and EndNote as you start your Research journey.

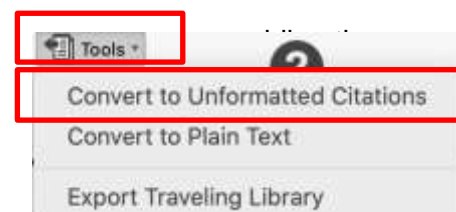
Copying text and references in a single document

If you are going to cut or copy and paste any part of the document, and you have already inserted citations, un-format the citations first. Un-formatting will strip the bibliography from your documents, putting temporary citations into the text as place-holders.

To **Un-format** citations:

- In the EndNote tab in **Word**, click on the down arrow next to **Tools**
- Click **Convert to Unformatted Citations**
- The citations will now appear with squiggly brackets author, year and the reference number for the citation in your EndNote Library e.g.

```
tab-{Chinowsky,2006-#58;Frank,2003-#59}.
```
- You can now safely copy and paste text in your document.
- To Reformat the citations, click **Update Citations and Bibliography** from the EndNote tab in Word



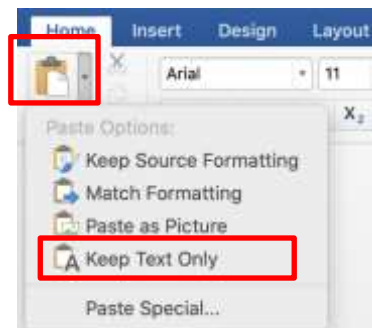
Safely copying text and references between documents

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.
Highlight the desired text

1. **Command + C** to copy the text.
2. Switch to the other document.
3. Command + V to paste the text..
4. Click the Paste icon, and from the menu select Keep Text Only.
5. Reinsert the EndNote reference.



When submitting a document to your supervisor

It is recommended that you **un-format** your document prior to submitting a copy to your supervisor for comments.

1. From the EndNote tab in Word, click on the down arrow next to click **Tools**.
2. Select **Convert to Unformatted Citations**.

When receiving a document from your supervisor

Note: Be mindful of Track Changes in Word documents as EndNote does **not** work well with them. When you receive a document with Track Changes it is recommended that you either accept or reject accordingly, and only **then** apply the **Update Citations and Bibliography** from Word's EndNote toolbar.

Unformatting citations and bibliographies

If you are writing a document and inserting citations over a long period of time, you should regularly unformat and then re-format your citations. You may even choose to work with unformatted citations, reformatting your documents once a week to check that the citations are appearing correctly in your document.

The in-text citations will change from e.g. **(Yeo 2012)** to **{Yeo, 2012 #39}** and the bibliography will temporarily disappear. Note that the placeholder includes the unique record number of the reference in your EndNote Library e.g. #39.

It is advisable to separate your thesis chapters into separate documents, then combine them before submission.

If you intend to combine separate documents (for example, chapters) that already contain citations, unformat the citations in all the documents before combining them into a single document, then re-format them.

Merging documents to create a single bibliography

You can create a single bibliography from multiple documents, for example where each chapter of a thesis is a separate document or where you are collaborating with other Endnote users and you have each written a separate part of the paper.

To generate a single bibliography:

1. In each of your documents, or chapters, insert your citations using Endnote's CWYW tools.
2. In the EndNote tab in Word, click on the down arrow next to **Tools > Convert to Unformatted Citations**
3. Cut and paste documents together, inserting breaks between chapters.
4. To-reformat the document, in the EndNote X9 toolbar in Word, select **Update Citations and Bibliography**

NOTE: If you want to format a bibliography for each subdocument plus a cumulative bibliography at the end of the master document, follow the instructions above, but use an output style that allows formatting of Sections.


You can also use Word's Master Document feature to generate a single cumulative bibliography at the end of the last combined document.

Preparing your document for submission

If you wish to submit your thesis or a paper for publication, you must first remove all field codes as these could interfere with the publishing software used to produce the journal.

1. In Word on the EndNote tab, click on the down arrow next to **Tools > Convert to Plain Text** or choose **Convert Citations and Bibliography > Convert to Plain Text** or
2. This will preserve your original document and create a new, unsaved version without Endnote field codes.
3. Save the new document under a new name, and send that version for publication.

Further help

- The full Endnote Manual (EndNote.pdf) is automatically downloaded when you install Endnote on your computer, and is available from your Endnote program via Applications
- Click on Help on the EndNote toolbar or the  icon.
- Self-paced Library guide - <http://rmit.libguides.com/endnote>
- Technical problems with downloading or installing EndNote - <https://www.rmit.edu.au/students/support-and-facilities/it-services-for-students/service-and-support-centre>
- Complex technical problems with EndNote Library - www.endnote.com



Final Tip: Keep a backup of your EndNote library in a different location for safekeeping and in case of lost USBs, corrupt or damaged EndNote files, network issues, computer problems, etc. Your EndNote Library comprises two files that MUST be kept together – the .ENL file and the corresponding .DATA folder (whether or not you have attached PDFs).

Use the Compressed Library option to back up your Library. **File > Compressed Library**. This will give it an .enlx extension.