

RMIT University Library

PhDUp! EndNote X9 & Word 2016 (365) Training Notes 2020

Windows

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PART 1 - Creating an EndNote Library and adding References

Opening EndNote and creating a new library

- 1) EndNote is already loaded on RMIT computers:



(Start) > All Programs > EndNote > EndNote

- 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

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 EndNote (RIS) Export icon.



6. You'll now see 3 options next to My Favourites.

7. Select the ellipsis icon.



8. Select Export Record from the list.
9. Ensure **UTF-8 Encoding** is selected and then **Download**.



10. Save the **Primo_RIS_Export.ris** file to your desktop (or another convenient location).
11. Open the file from your desktop (or convenient location) and this will send the record(s) to your Endnote library.

Exporting records from Library Databases: Scopus

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.

Export document settings (1)

You have chosen to export 1 document

Select your method of export

RIS (EndNote, Reference Manager)
 RIS Format (EndNote, Reference Manager)
 CSV (Excel)
 BibTeX
 Text (ASCII or HTML)

What information do you want to export?

Customize export

<input checked="" type="checkbox"/> Citation information	<input type="checkbox"/> Biographical information	<input checked="" type="checkbox"/> Abstract and Keywords	<input type="checkbox"/> Funding Details	<input type="checkbox"/> Other information
<input checked="" type="checkbox"/> Author(s) <input checked="" type="checkbox"/> Document title <input checked="" type="checkbox"/> Year <input checked="" type="checkbox"/> Source title <input checked="" type="checkbox"/> Volume, Issue, Page <input checked="" type="checkbox"/> Citation count <input checked="" type="checkbox"/> Source and Document Type <input checked="" type="checkbox"/> DOI	<input type="checkbox"/> Affiliations <input type="checkbox"/> Social identifiers (e.g. ISSN) <input type="checkbox"/> PubMed ID <input type="checkbox"/> Publisher <input type="checkbox"/> Editor(s) <input type="checkbox"/> Language of Original Document <input type="checkbox"/> Correspondence Address <input type="checkbox"/> Abbreviated Source Title	<input checked="" type="checkbox"/> Abstract <input checked="" type="checkbox"/> Author Keywords <input checked="" type="checkbox"/> Index Keywords	<input type="checkbox"/> Number <input type="checkbox"/> Accession <input type="checkbox"/> Sponsor <input type="checkbox"/> Funding text	<input type="checkbox"/> Trademark and Manufactures <input type="checkbox"/> Accession numbers and Classicals <input type="checkbox"/> Conference information <input type="checkbox"/> Include references

Cancel

9. Download and save the **scopus.ris** file to your desktop (or another convenient location).

10. Open **scopus.ris** file from your desktop (or convenient location) - this will send the records to the EndNote library.

Note: Scopus will remember these settings for the session, so next time you export you'll see RIS export.

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 RIS Endnote, Citavi, etc

MOST POPULAR



Cite



Email



Save to My
Research



EndNote,
Citavi, etc.

7. The **Export/Save** box will appear. Select **Continue**.

8. Download the **ProQuestDocuments (dated).ris** (e.g. ProQuestDocuments-2017-04-03.ris) file to your desktop (or another convenient location).

9. Open the **ProQuestDocuments (dated).ris** (e.g. ProQuestDocuments-2017-04-03.ris) file from your desktop (or convenient location) - this will send the records to the EndNote 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

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 right 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.
- Chrome users: Save the '*citations.enw*' file and then double click it.
 - Firefox or Internet Explorer users: You can save or open the file (look for the pop up at the bottom of the screen)
9. 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** (” icon) 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. 9-10). You can make quick corrections to fields in the **Reference** tab.



- You can add **Ratings** and **Research Notes** to identify important references (within **Reference** tab).

- You can view full-text PDFs in the **Attached PDFs** tab.



Instructions on attaching PDFs can be found on pp. 11-12 in this document

Capturing Web references using EndNote basic.

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

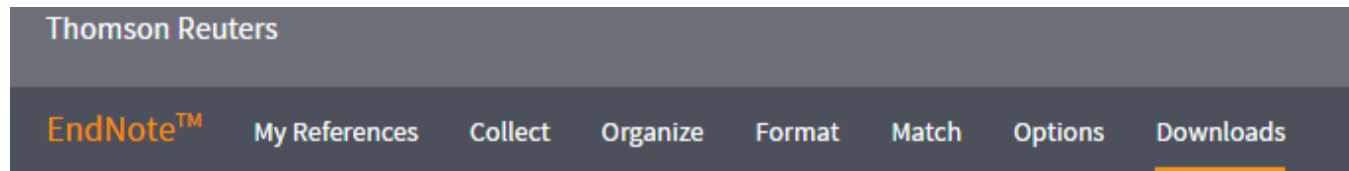
****You need to have an *EndNote basic* account before you can capture webpage information****

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.

1. Go to <http://www.myendnoteweb.com> and login to your account.

2. Scroll across the top section and select Downloads



3. Drag and drop the Capture Reference icon into your bookmarks toolbar.





4. 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.

5. 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:

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

Title:

Year:

Series Editor:

Series Title:

Place Published:

Publisher:

Access Year:




Access Date:

Description:

You can add in additional information. See the minimum fields listed on page 13. 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.

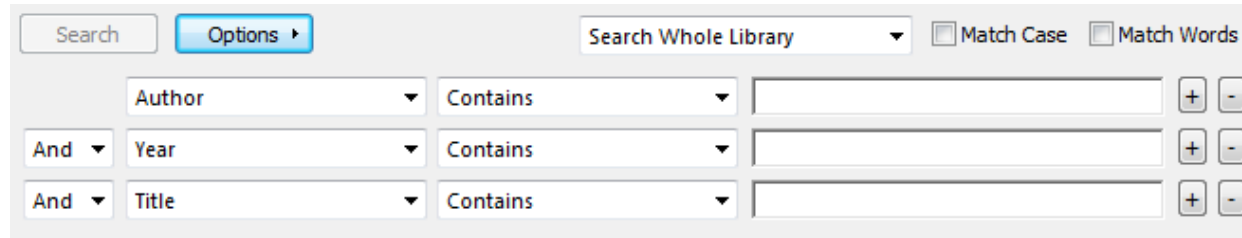
  Author 	Year	Title	Rating	Journal	Last Updated	Reference Type
--	------	-------	--------	---------	--------------	----------------

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 toolbar, or by clicking on the arrows to extend the



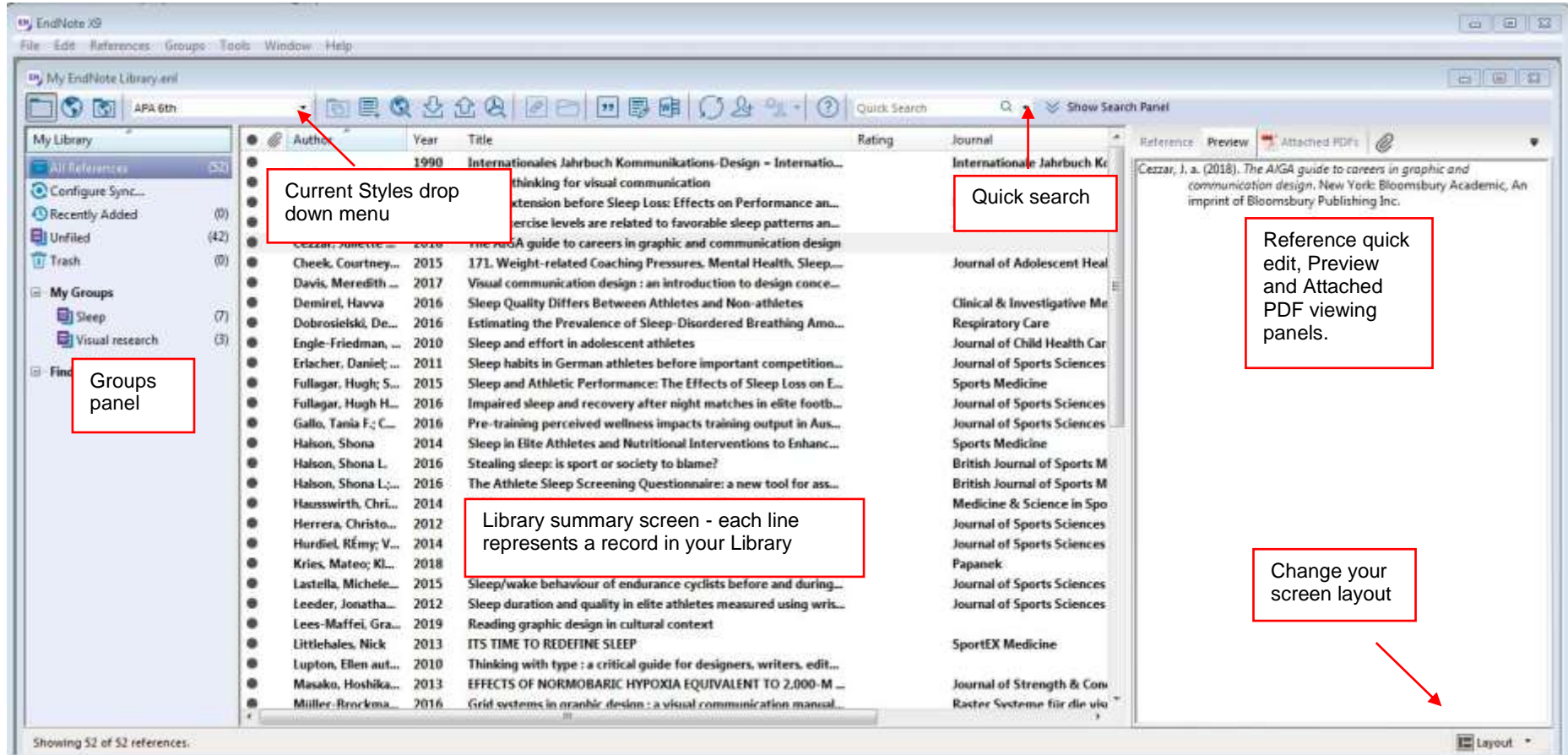
Quick Search box on the Search Panel.



The screenshot shows the search panel interface. At the top, there is a 'Search' button, an 'Options' button with a dropdown arrow, a 'Search Whole Library' dropdown menu, and two checkboxes: 'Match Case' and 'Match Words'. Below this, there are three search criteria rows. Each row consists of an 'And' dropdown, a field for the search criteria (Author, Year, Title), a 'Contains' dropdown, a text input field, and '+' and '-' buttons. The first row is for 'Author', the second for 'Year', and the third for 'Title'.

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 X9 interface with the following annotations:

- Current Styles drop down menu:** Points to the 'APA 6th' style dropdown in the top toolbar.
- Quick search:** Points to the 'Quick Search' field in the top toolbar.
- Reference quick edit, Preview and Attached PDF viewing panels:** Points to the right-hand pane showing a reference preview and attached PDFs.
- Groups panel:** Points to the left-hand pane showing library groups like 'All References', 'Recently Added', and 'My Groups'.
- Library summary screen - each line represents a record in your Library:** Points to the central list of references with columns for Author, Year, Title, Rating, and Journal.
- Change your screen layout:** Points to the 'Layout' button in the bottom right corner.

Author	Year	Title	Rating	Journal
	1990	Internationales Jahrbuch Kommunikations-Design - Internatio...		Internationales Jahrbuch K...
		thinking for visual communication		
		extension before Sleep Loss: Effects on Performance an...		
		ercise levels are related to favorable sleep patterns an...		
Cezzar, J. a.	2018	The AIGA guide to careers in graphic and communication design		
Cheek, Courtney...	2015	171. Weight-related Coaching Pressures, Mental Health, Sleep...		Journal of Adolescent Heal
Davis, Meredith ...	2017	Visual communication design : an introduction to design conce...		
Demirel, Havva	2016	Sleep Quality Differs Between Athletes and Non-athletes		Clinical & Investigative M...
Dobrosielski, De...	2016	Estimating the Prevalence of Sleep-Disordered Breathing Amo...		Respiratory Care
Engle-Friedman, ...	2010	Sleep and effort in adolescent athletes		Journal of Child Health Car
Erlacher, Daniel; ...	2011	Sleep habits in German athletes before important competition...		Journal of Sports Sciences
Fullagar, Hugh; S...	2015	Sleep and Athletic Performance: The Effects of Sleep Loss on E...		Sports Medicine
Fullagar, Hugh H...	2016	Impaired sleep and recovery after night matches in elite footb...		Journal of Sports Sciences
Gallo, Tania F.; C...	2016	Pre-training perceived wellness impacts training output in Aus...		Journal of Sports Sciences
Halson, Shona	2014	Sleep in Elite Athletes and Nutritional Interventions to Enhanc...		Sports Medicine
Halson, Shona L.	2016	Stealing sleep: is sport or society to blame?		British Journal of Sports M
Halson, Shona L.;...	2016	The Athlete Sleep Screening Questionnaire: a new tool for ass...		British Journal of Sports M
Hausswirth, Chri...	2014			Medicine & Science in Spo
Herrera, Christo...	2012			Journal of Sports Sciences
Hurdie, Rémy; V...	2014			Journal of Sports Sciences
Kries, Mateo; Kl...	2018			Papanek
Lastella, Michele...	2015	Sleep/wake behaviour of endurance cyclists before and during...		Journal of Sports Sciences
Leeder, Jonatha...	2012	Sleep duration and quality in elite athletes measured using writ...		Journal of Sports Sciences
Lees-Maffei, Gra...	2019	Reading graphic design in cultural context		
Littlehales, Nick	2013	ITS TIME TO REDEFINE SLEEP		SportEX Medicine
Lupton, Ellen aut...	2010	Thinking with type : a critical guide for designers, writers, edit...		
Masaki, Hoshika...	2013	EFFECTS OF NORMOBARIC HYPOXIA EQUIVALENT TO 2,000-M ...		Journal of Strength & Con
Miller-Brockma...	2016	Grid systems in graphic design : a visual communication manual...		Raster Systeme für die visu

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.

Reference Type:

3. Close each Reference by clicking on the small X on the top right of the screen (below the larger one). The Reference saves automatically.

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)

E Book

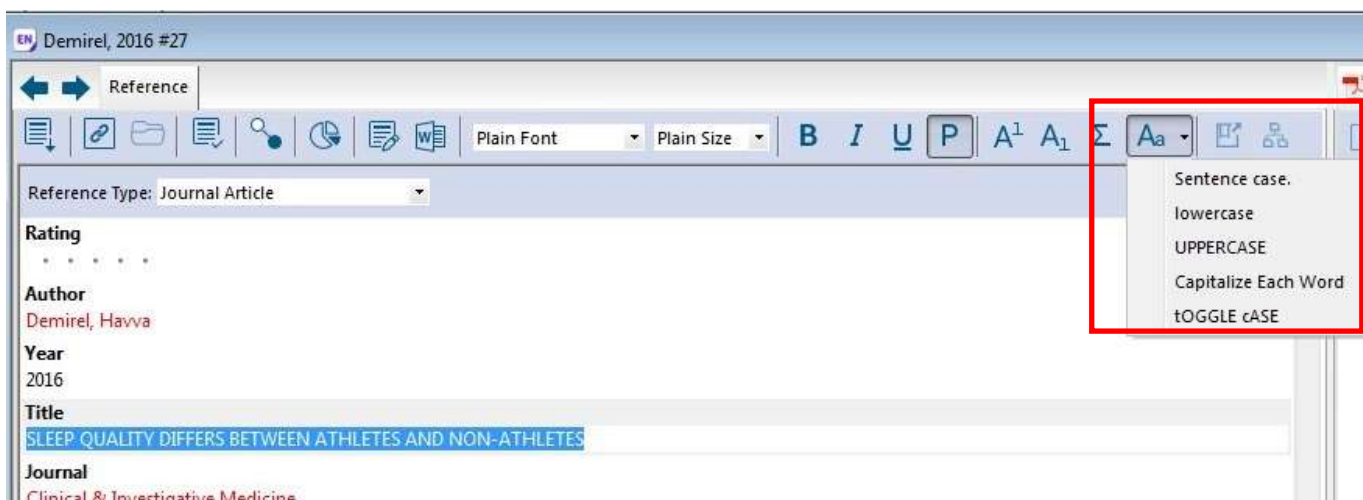
- Author
- Title
- Publisher
- Year (copyright date)
- Date accessed
- URL (or database name)

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. Click the Change case button
4. Select your preferred option.

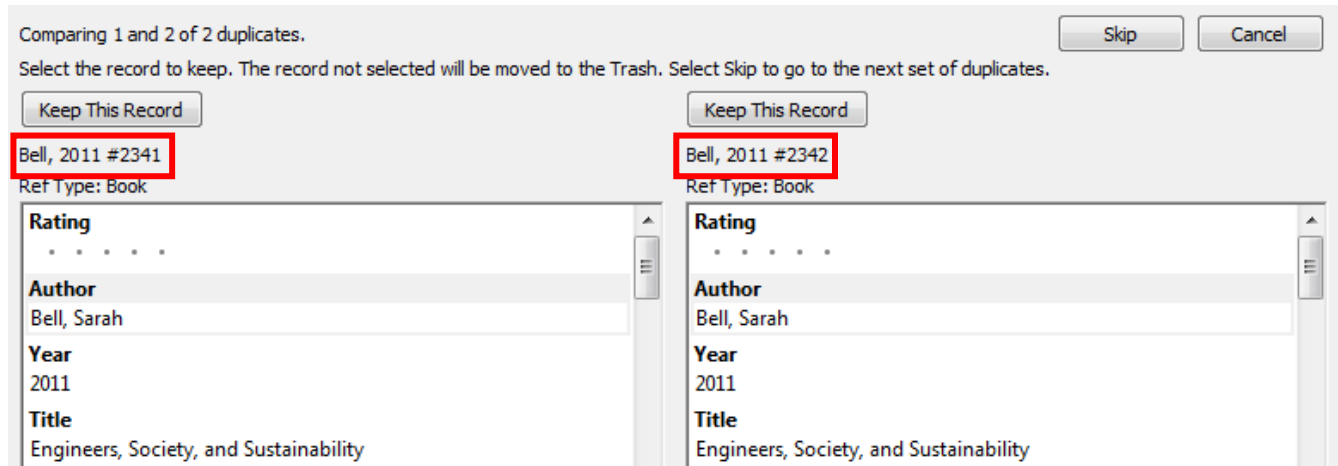


5. Close the window to save the changes.

Duplicate references

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

Check the completeness of the record you wish to keep eg. 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 21 for instructions on unformatting the citations in your Word document to identify the record you have inserted.



Adding full text

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

- 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 articles for which you want the full-text (Select multiple references from your EndNote library by holding down **Ctrl** 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

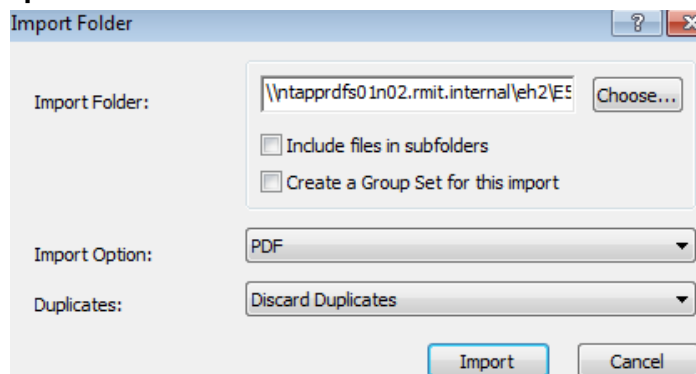
EndNote searches for the PDF files and where available, attaches them to your references.

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

- a) Go to **Edit > Preferences > Find full-text**.
- b) 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 records in EndNote

- a) **File > Import > File > Folder (or File)**
- b) Select Folder or File from existing location.
- c) Leave **Import Option** as PDF
- d) Change **Import All** to **Discard Duplicates**
- e) 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.

Automatically import PDF files

In EndNote, click **Edit > 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

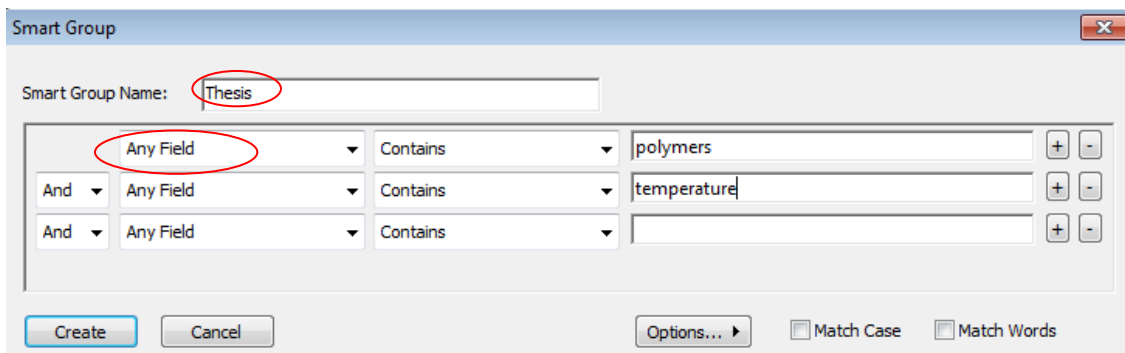
Groups make it easy to organise a large library into folders to manage references or use a subset of references for a paper or chapter. A group simply points to a subset of references that already exist in the library. They are a **COPY** only of selected references from your **All References**.

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

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

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

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



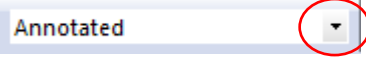
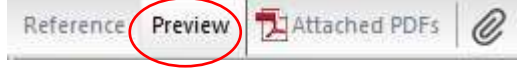
Smart Group

Smart Group Name: Thesis

Any Field	Contains	polymers	+	-	
And	Any Field	Contains	temperature	+	-
And	Any Field	Contains		+	-

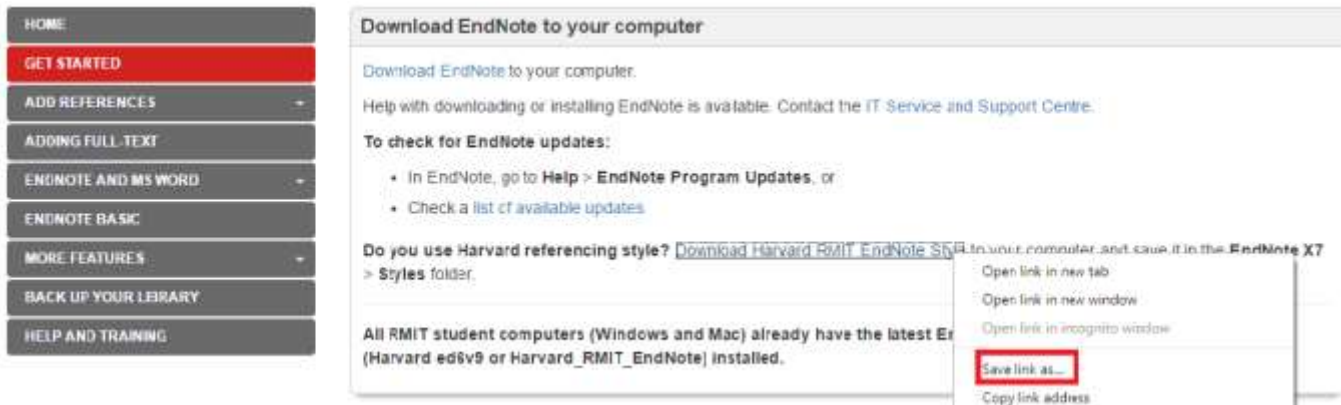
Create Cancel Options... Match Case Match Words

Formatting (changing) styles in EndNote

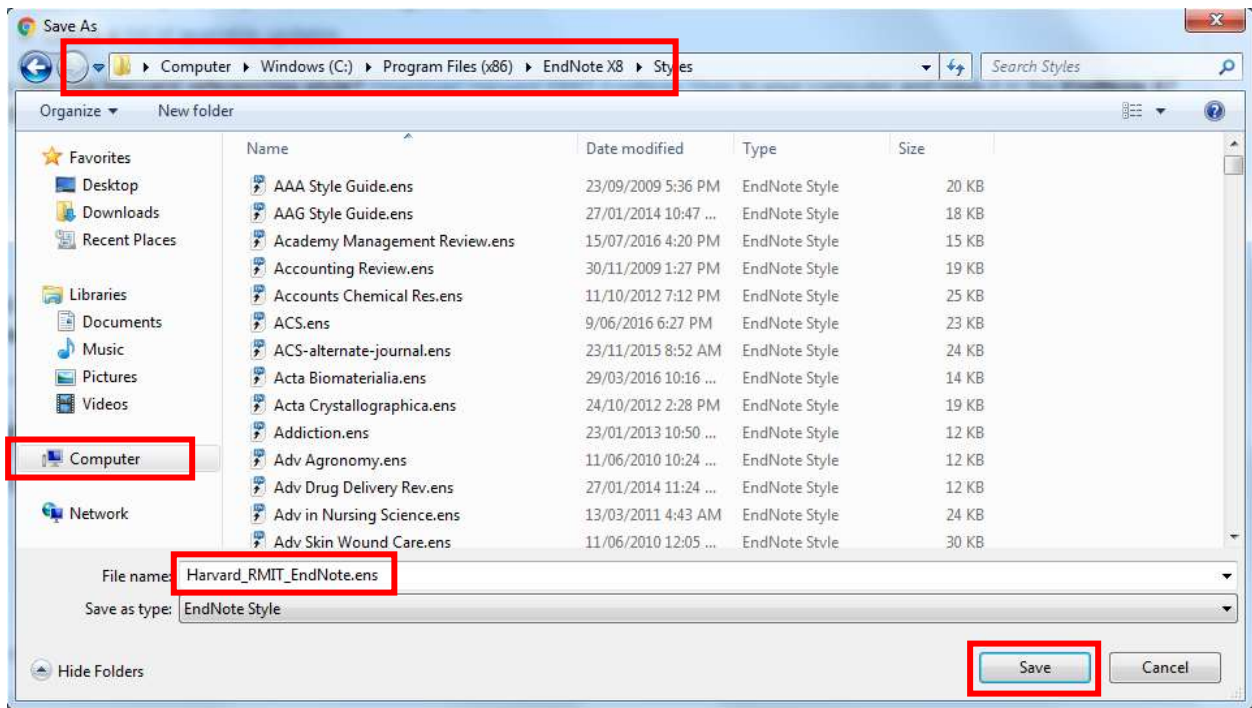
- Reference styles can be changed in EndNote **AND** in your Word document. The style selected should be the same in both.
- From **Style** drop-down menu,  click **Select Another Style**, select required style e.g. APA 6th or IEEE or other, and select **Choose** to add it to your list of styles.
- You can check the Preview tab to ensure it is correct. 
- 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 website within the **Downloads** tab - <http://www1.rmit.edu.au/library/endnote>.

- a) Right-click the RMIT Harvard style download link and select '**Save link as**'



- The style needs to be added to the hard drive of your computer
- Select **Computer > Windows (C:) > Program Files (x86) > Endnote X9 > Styles** and click **Save**.



- The **RMIT Harvard Style (Harvard_RMIT_EndNote)** will now be available to select from your styles folder.

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:

1. Open the library.
2. From the **File** menu select **Compressed Library** then **Create**.
3. 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 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/>.

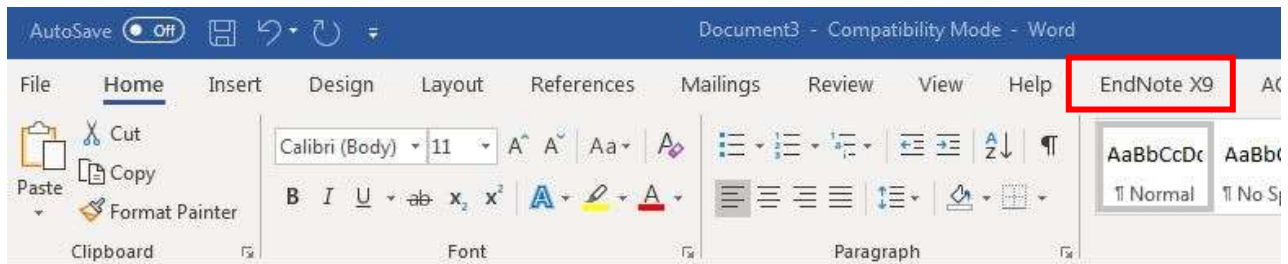
You can then share the entire library via EndNote X9 or just a group (or selected groups) via EndNote basic with fellow researchers.

- 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 basic 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).

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.



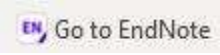

The style shown is usually the style you activated in EndNote X9. If not, see page 17 for instructions on how to change it.

Inserting a citation in Word

1. Make sure the EndNote library that contains the references you wish to cite is open. For the example below, we will use our new library.
2. Open a new Microsoft Word 2010 document.
3. Type one or two sentences (anything will do)
4. Select the **EndNote X9** tab.

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  .
3. In EndNote, highlight the reference and select **Insert Citation**  .
4. The 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. Select where you would like to insert citation in the text.



2. From the EndNote tab in Word, click **Insert Citation** .
3. From the pop up box, select **Insert Citation**  and type an author's last name or keyword
4. Click **Find** and EndNote will list the matching results.
5. Select the reference(s) you require and click **Insert**.


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.

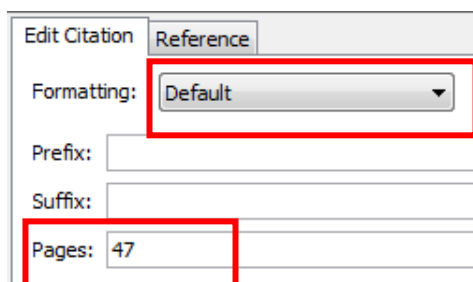
Inserting multiple citations:

Select multiple references from your EndNote library by holding down **Ctrl** 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)**.

Editing a citation in Word

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 in-text citation. This will automatically shade the citation in grey.
2. Click on **Edit & Manage Citation(s)**  on the EndNote toolbar OR right click and select **Edit Citations**.
3. From the **Formatting** 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, eg. APA 6th, Harvard_RMIT_EndNote.




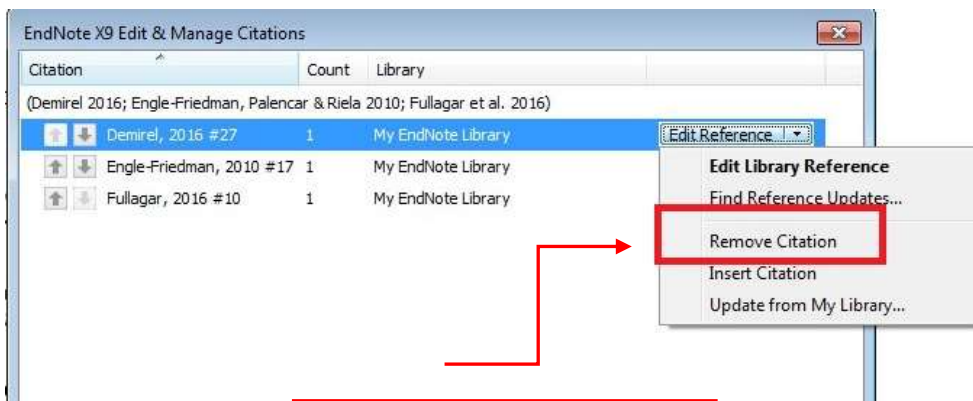
Note: If the style is not set up to show information from the Pages box (most of the journal output styles are not) then you add page numbers in the **Suffix** field, including punctuation, e.g. , **p. 25** (a space before the comma is necessary).

Removing a citation in Word

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



This is the only safe way to remove EndNote references.
Do NOT hit the delete key!


6. Click **OK**.

Special characters and character sets

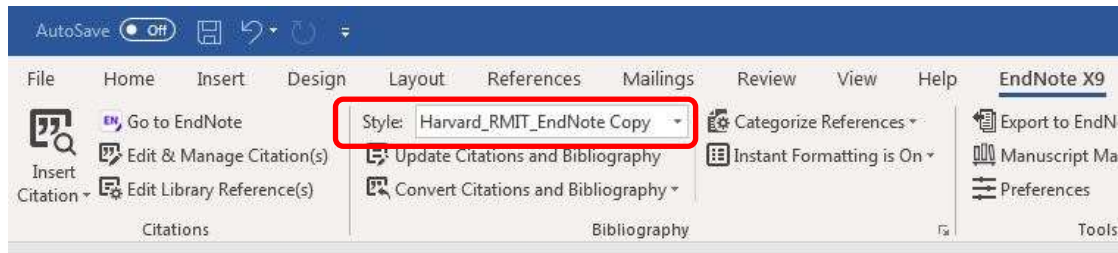
Special characters can be entered into Endnote using any of these text-entry methods:

- Type the character on the keyboard (if the character is part of the language supported by the keyboard).
- Copy the character from another windows program, and paste it into your Endnote library.
- Use the Character Map program supplied with Windows.

Start > Menu > Programs > Accessories > System Tools > Character Map

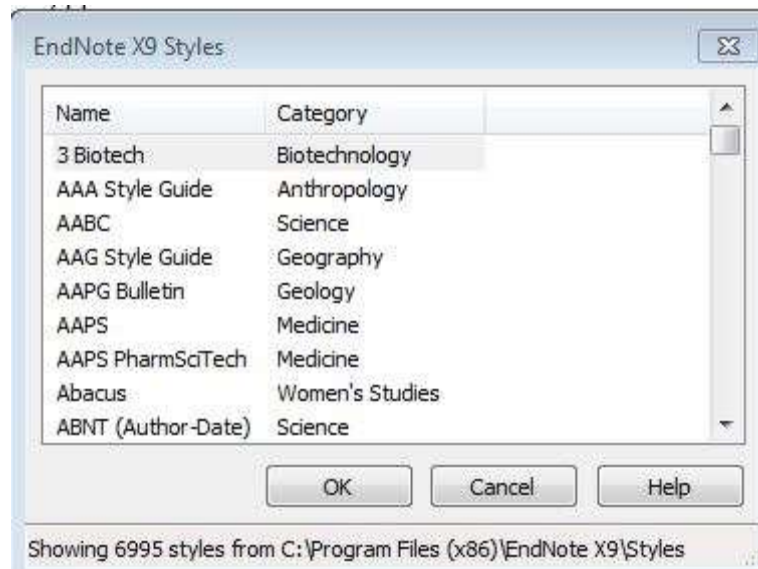
Note: If you edit a reference in EndNote, the changes you make won't be reflected in your Word document until you update your Bibliography. In Word, click on **Update Citations and Bibliography** .

Changing a style within Word:



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.

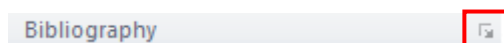


5. Click **OK**.
6. Your document automatically reformats to reflect the new style.

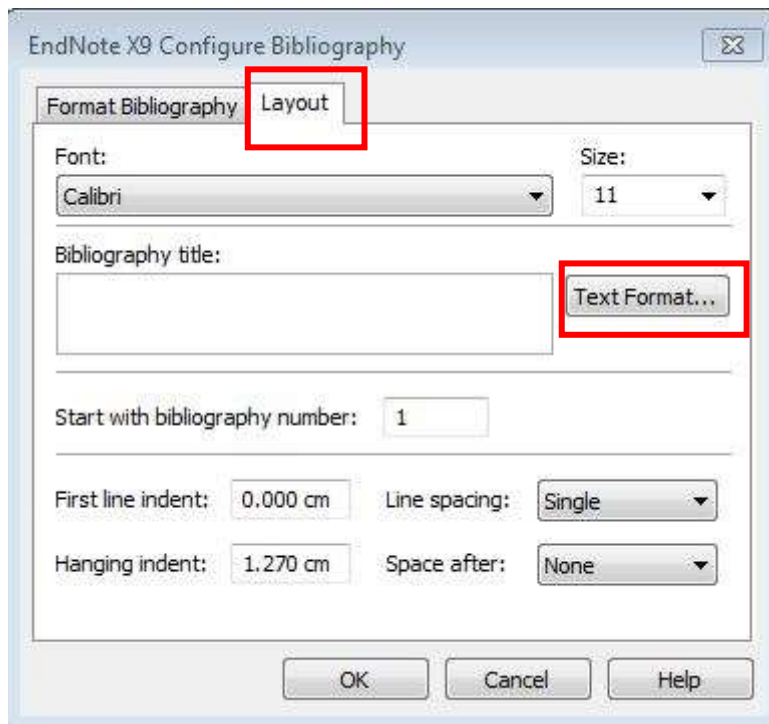
Formatting your Bibliography

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. In Word, click on the arrow to the right of the **Bibliography** link.



2. This will open the **Format Bibliography** tab.
3. Click the **Layout** tab to check or modify settings.



4. You can change the font size and style of your bibliography.
5. Give the bibliography a title, e.g. **Bibliography**; highlight the title and click **Text Format** to make changes to the size and style of the font.
6. You can change the line spacing between references or alter the hanging indent.
7. When you have made all required changes, click **OK** to reformat the bibliography.

Creating a standalone bibliography

You can create a standalone text only bibliography 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 **Ctrl 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

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

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

- Remove using the Word toolbar by selecting **File > Options**.
- Select the **Advanced** tab, scroll down to **Show Document Content > Field Shading**.
- There are three options: choose **When selected > OK**.


Field shading: **When selected** ▼

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 the **File > Options**.
- On the **Advanced tab**, scroll down to **Show Document Content > Show field codes instead of their values'** and uncheck the box.  Show field codes instead of their values
- Click **OK**. The document should now appear normal.

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

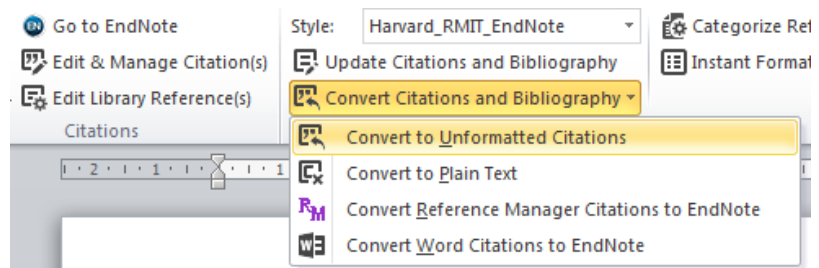
This section contains some useful tips for working with your documents and EndNote as you start your Research journey.

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, unformat the citations first. Unformatting will strip the bibliography from your documents, putting temporary citations into the text as place-holders.

To **Unformat** citations:

1. Click **Convert Citations and Bibliography**
2. Select **Convert to Unformatted Citations**
3. The citations will now appear with squiggly brackets, providing the author, year and the reference number for the citation in your EndNote Library



e.g `tab-{Chinowsky,2006-#58;Frank,2003-#59}:`

4. You can now safely copy and paste text in your document.
5. To Reformat the citations, click **Update Citations and Bibliography**.

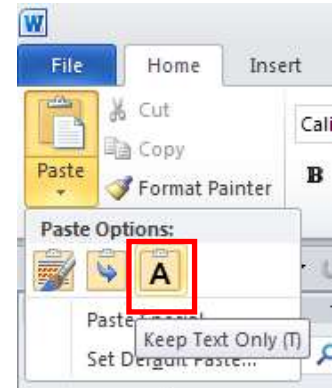
Safely copying text and references between documents

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.



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. Click on the small arrow beside **Convert Citations and Bibliography**.
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 eg (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 eg. #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.

To generate a single bibliography:

1. In each of your documents, or chapters, insert your citations to link them to references in an EndNote library.
2. In each Word document, go to the **EndNote X9** submenu, click on **Convert Citations and Bibliography > Convert to Unformatted Citations** to unformat your citations.
3. Cut and paste documents together, inserting breaks between chapters.
4. Reformat the document; click on **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, choose **Convert Citations and Bibliography > Convert to Plain Text**.
2. This will preserve your original document and create a new, unsaved version without Endnote codes.
3. Save the new document under a new name, and send that version for publication.

Further help

- Arrange an individual EndNote consultation with a research librarian using this [form](#)
- The full Endnote Manual is automatically downloaded when you install Endnote on your computer, and is available from your Endnote folder via the Start Menu.
- 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 - <http://www1.rmit.edu.au/its/ithelp>
- 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.