UTS
UNIVERSITY OF TECHNOLOGY, SYDNEY

**Using *EndNote X7*
to Manage Bibliographies
on a Mac!**

**A Guide to EndNote
by
Information Services Staff
of
UTS Library**

**University of Technology, Sydney
University Library
(May 2014 version)**

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1.   What is EndNote?

EndNote is a software program that stores and organises your references. References can be transferred from EndNote into a Word document, automatically generating in-text citations *and* an end-of-paper bibliography, all correctly formatted in your choice of referencing style.

- The version of EndNote covered by this Guide is *EndNote X7*.
- The guide covers Word 2011/2008/2004. In theory, EndNote does also work with *Pages* but there are a number of issues, check EndNote's website for more information. This guide does not cover *Pages*.
- UTS Library's *EndNote* web pages can be reached from the Library Home Page via the *Referencing* link in the Quick Links section on the right.
- EndNote is available at no cost to UTS staff and students, but it **must be downloaded and installed onto your computer from the Library web pages** (UTS login required).

2.   Getting started with an EndNote Reference Library

2.1   Reference libraries

References (ie citations) are stored in an *EndNote Library*. You can create more than one library, but *it's usually best to store all your references in a single library*, even if they are being used for several unrelated projects (you can use *Groups* to organise them: see Section 3.2). You will need to be able to access this library from each computer you may be working on (see next section).

2.2   Creating and Opening a reference library

Once you install EndNote, you will be asked if you want to create a new reference library or use an existing one. To **create** a new library, select that option, give the library a name, select a location (*which should be a USB or portable hard drive if you want to use it on more than one computer*), and click on **Save**. You can also **create** a new library in EndNote by clicking on **File**, **New**. Whenever you use EndNote it will automatically try to open the library you used most recently on your current computer. To open a different library, click on **File, Open**.

It is also possible to store EndNote libraries in cloud-based services such as *Dropbox*. EndNote has its own cloud-based service, *EndNote Online*: see Section 9 for more information.

In EndNote X7, libraries have "panels". You can change the way the panels are displayed by using the **Layout** drop-downs in the top right corner of your library (see Figure 1 on next page).
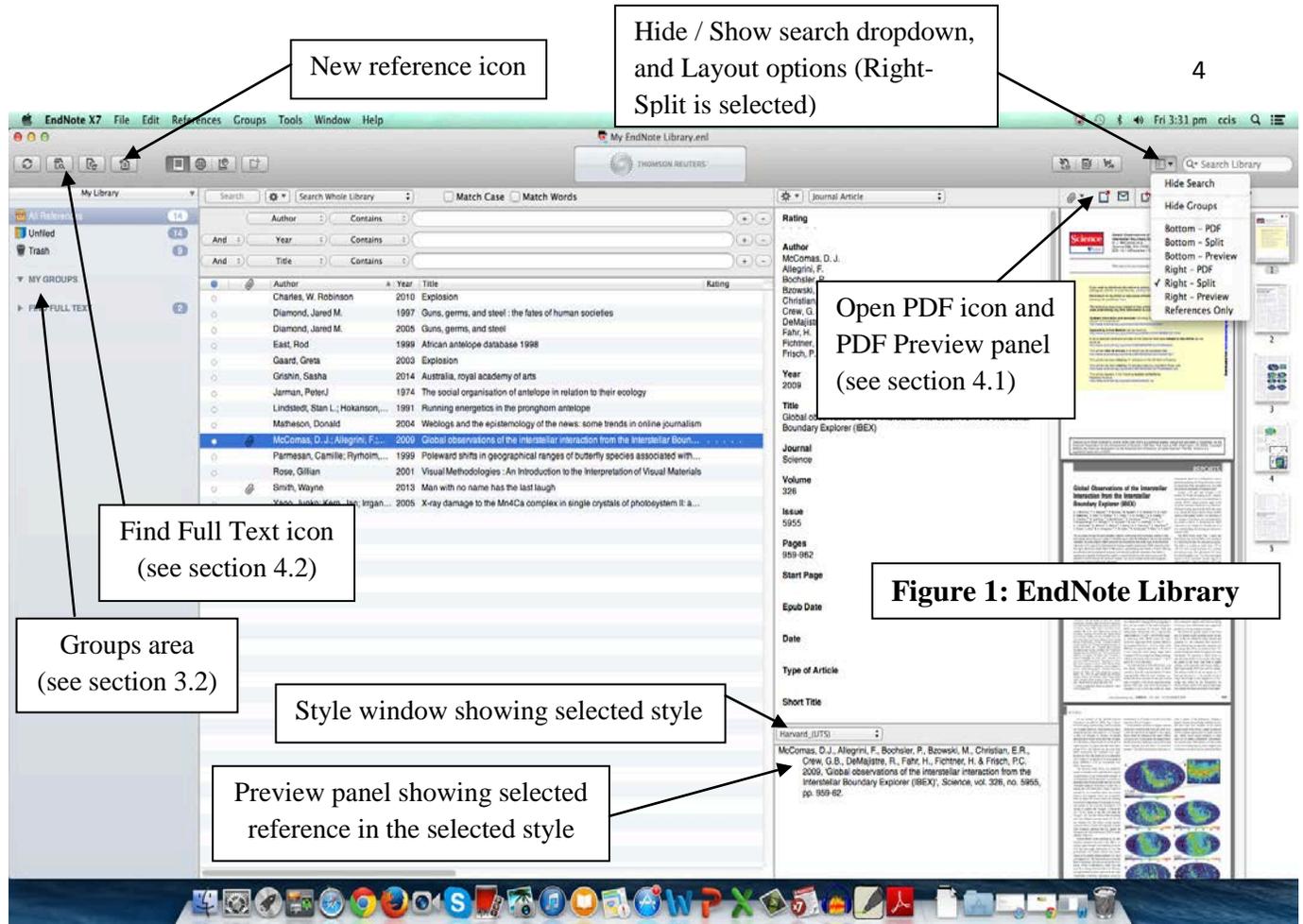
Figure 1: EndNote Library

(Callouts on figure:) New reference icon · Hide / Show search dropdown, and Layout options (Right-Split is selected) · Open PDF icon and PDF Preview panel (see section 4.1) · Find Full Text icon (see section 4.2) · Groups area (see section 3.2) · Style window showing selected style · Preview panel showing selected reference in the selected style

2.3 Adding references manually to your reference library

- Click on the *New Reference* icon (see Figure 1 above). This brings up a new, blank reference template (see Figure 2 below).

- Use the dropdown menu at the top to choose the appropriate **Reference Type**.

- Type in, or paste, the details of your reference. *Leave as many sections blank as you wish*.

- When adding *Authors* or *Editors:*
  - Always add the family name first, then a comma, a space, and then first name(s) or initials.
  - If there is more than one author or editor, *each author must be on a separate line*.
  - Add all authors: your chosen reference style will know how to abbreviate lists of authors.
  - If an author is an organization, eg Department of Finance *place a single comma after the last word of the organisation's name*, eg Department of Finance,

- **Close** and save the new reference. You'll now see it in your reference library.

- To delete a reference, select it and use the delete key. Deleted references are placed in *Trash*. You can recover these if needed by dragging them from *Trash* back to *All References*.

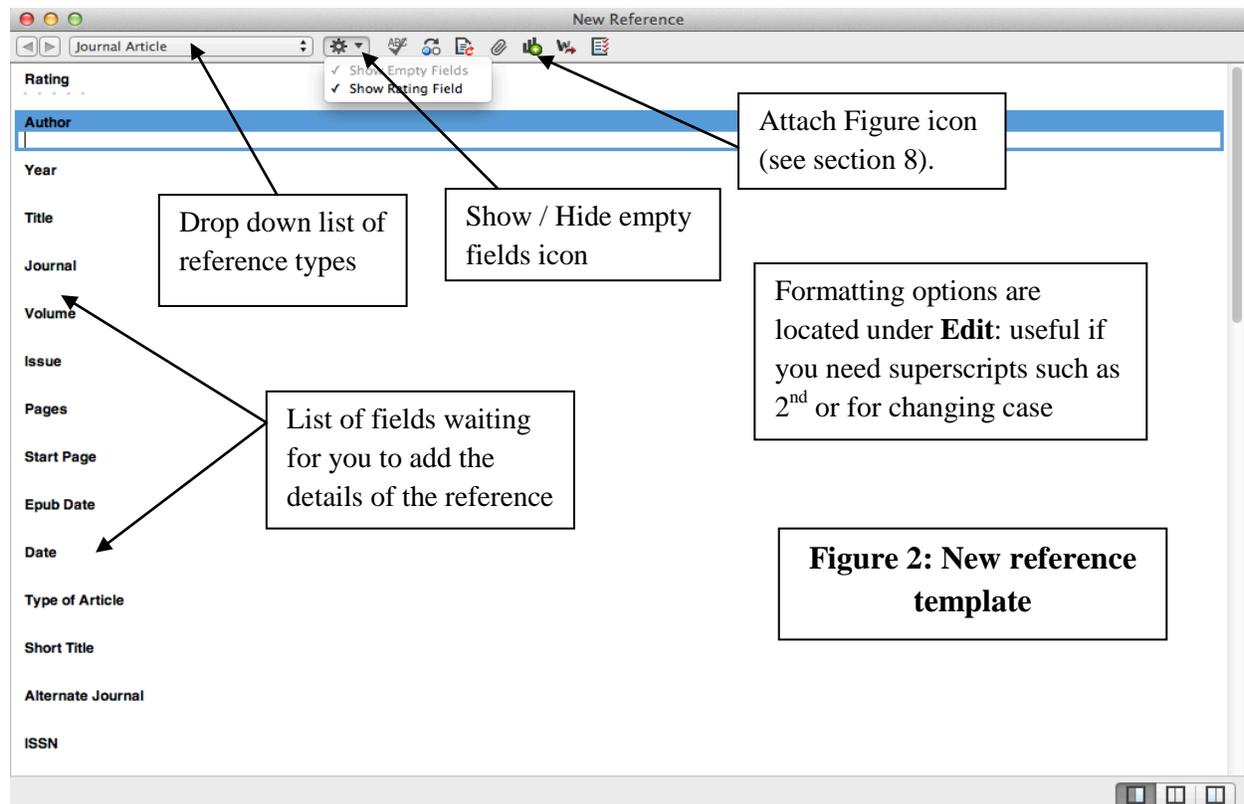## 2.4   Creating a backup copy of your EndNote library

Do this regularly! The best way is to click on **File** (in EndNote's menu bar), then **Compressed Library**. Create your compressed library (ie your backup) *With File Attachments* (see Section 4) and (normally) from *All References in Library*. Choose where to save the backup (*not on the same computer!*). It's a good idea to *add the date* into the name of the backup, and possibly a word such as *backup*. A compressed library is a single file containing *both* your EndNote Library *and* its *.Data* folder that contains any attachments (see Section 4.1).

3.   Managing the references in your Reference Library

3.1   Editing references

To edit a reference, **double click** on it in the library to bring up its template. You can add or delete data, or change reference type. Then **close** the template window and save changes.

- Use the **Research Notes** field for your own notes, such as summaries, useful features they contain, and so on. You can add as much information here as you wish.
- Use the *Show/ Hide Empty Fields* icon (see Figure 2) to show or hide any empty fields (note that this will affect all the references in your library).

Drop down list of reference types

Show / Hide empty fields icon

Attach Figure icon (see section 8).

List of fields waiting for you to add the details of the reference

Formatting options are located under **Edit**: useful if you need superscripts such as 2nd or for changing case

Figure 2: New reference template

3.2   Creating Groups of references within your Reference Library

- *Control + click* in the *Groups* area on the left of your library (see Figure 1) and select **Create Group** to create & name a new Group. You can create as many different Groups as you wish.

- Copy references into a Group by selecting in *All References*, then drag and drop onto the Group name. Each reference can be copied into many Groups.

- Alternatively, *Control + click* on selected references and choose *Add References To* your chosen Group.

- Click on the name of a Group to display just the references that have been added to that Group.

- Groups only contain copies of the references. If you delete a reference from a Group, or even delete the entire Group, the references will still be in *All References*. (But if you delete a reference from *All References* it is also deleted from all the Groups it was in).

- *Control + click* in the Groups area and select **Create Group Set** to create a *Group Set* to help you organise your Groups. Dragging a Group onto a Group Set moves it into the Group Set.

- You can also create *Smart Groups*: this allows you to specify in advance certain properties for all the references in the Smart Group (eg certain words appearing in certain fields). References with these properties (including later additions) are automatically added to the Smart Group.

- The *Unfiled* group always shows those references that have not yet been added to any Group.

- When you import references from a database (see Section 6.2) a Group is created that contains the most recently imported references.

- When you insert references into a Word document (see Section 7), a Group is created that contains all the inserted references in the document.

3.3   Searching your reference library

With your reference library open, click on *All References* and then use the *Search Library* window. Use the *Show Search* option in the layout dropdown menu (see Figure 1) if you want to search specific fields of your references. You can force Match Case or Match Word if you wish.

3.4   Removing duplicate references

Click on **References** (in EndNote's menu bar), then **Find Duplicates**. Pairs of duplicates are displayed, allowing you to keep the ones you want. Deleted duplicates are moved to *Trash*. If unsure, always keep the left reference of a pair, because this has been in your library the longest.

3.5   Find reference updates

This is a new feature that allows you to update the data in the fields of your journal article references. It works best if you have an article's DOI (digital object identifier) but can sometimes work with author, year and journal name instead. This is especially useful if you have a pdf file that cannot be imported into your library (see Section 4.3) but which has a DOI (not all pdfs have a DOI, unfortunately). Make sure the DOI is in a reference's DOI field (all other fields can be empty), select it in your EndNote library, and then select **References, Find Reference Updates …** If updated data can be located, you will be shown a template with the updated data, which you can transfer into your original reference in EndNote.

3.6   Merging several EndNote libraries together

- Open the EndNote library you wish to be your main library, or alternatively create a new, empty library that will become the main library. Close all other libraries.
- Click on the **File** in EndNote's menu bar, then **Import**, **File**, and choose another reference library as your **Import Data File**. Using the **Import Option** dropdown menu, choose **EndNote Library**, then click on **Import**. This also imports any attached files.
- Alternatively, you can select and then copy and paste references from one library to another.

4.   EndNote and Attachments (such as the Full text of references)

4.1 Attaching saved files (pdf or any other format) to a reference

Drag the icon of the saved file and drop it onto the reference in your EndNote library. Alternatively, *Control + click* on the reference you want to attach the file to, and choose **File Attachments**, **Attach File ...** Choose your file and then click on **Open**.

- A paperclip symbol appears next to each reference with an attached file. You may need to click on another reference, or open and then close the reference, to see this paperclip. To open an attached file click on the **Open PDF** icon (see Figure 1).
- **You can attach more than one file to a reference, and the files can be in any format**. You can see which files have been attached to a reference by opening the reference and scrolling down to the *File Attachments* field. You will see icons for any attached files. Clicking on an icon will open its file. Deleting an icon deletes the attached file it represents.
- Once a file is attached, you no longer need the saved original: attaching a file copies and stores it in a folder that was automatically created when you created your reference library. This folder has the same name as the library, followed by *.Data* (instead of *.enl*). It contains all

your attached files (**so it is very important!**) and is stored with its associated library. The *.Data* folder is automatically backed up when you use *File, Compressed Library* to create a backup copy of your reference library (see Section 2.4). The *.Data* folder also contains details about your Groups (see Section 3.2) and attached figures (see Section 8).

4.2   Using SFX to find and attach pdf files to your references

If you have references in your library but no saved pdf files, you can get EndNote to find and attach the pdfs, *if UTS Library subscribes to a database that contains the required pdf*.

- Click on **EndNote X7, Preferences**.
- Select *Find Full Text* from the list of preferences on the left of the preferences window.
- In the **Open URL Path** box, type: **http://sfx.lib.uts.edu.au/sfx_local**
- In the **Authenticate with** box, type: **http://www.lib.uts.edu.au/auth/login**
- Then click on **Apply** and **OK**. If you now *Control + click* on a reference (or several selected references) in your EndNote library and choose *Find Full Text*, EndNote will search the library's databases for full text and (if successful) attach pdfs to the selected references. You can also use the *Find Full Text* icon in EndNote's menu bar to do this.

4.3   Importing pdf files directly into your EndNote library

If you have saved pdf files but do not yet have references for them in your EndNote library, EndNote allows you to import these directly into your EndNote library, automatically creating an EndNote reference from data in each, and then attaching the pdf to it. This can be done for individual files, or for a whole folder of saved pdfs.

However, *the original pdf must be in a format that allows EndNote to extract citation data*, and unfortunately many pdfs are not in this format. Otherwise (for example if your pdf is a scanned document), the reference that is created will have mostly empty fields and these will need to be filled out by you with data from the attached pdf. If this happens, and your pdf has a DOI, you can use **Find reference updates** (see Section 3.5) to correctly populate the empty fields.

- In EndNote, click on **File**, **Import**. Select the file or folder you wish to import, set *Import Option* to "PDF File or Folder", and click on **Import**.
- You'll see the new reference(s) in your library, each with its pdf attached. (Note that if the pdf is not in a compatible format the references will have almost all fields empty, see above).
- A short cut for the above is to drag the icon of the pdf onto the *Preview* area at the bottom of the Library window.

## *5. Reference Styles*

5.1 Reference styles at UTS

- Many areas of UTS use the reference style **Harvard (UTS)** which is derived from the Australian Government's *Style Manual* (6th edition, 2002). The Faculty of Law uses the **AGLC** style which is based on the *Australian Guide to Legal Citation* (3rd edition, 2010).

- EndNote's current style is shown in the style window at the top of the library (see Figure 1).

- EndNote comes with many reference styles to choose from. To see them, use the style window's dropdown menu to *Select Another Style*.

- Most of EndNote's styles are based on the preferred style of various journals. Choosing a style adds it to the dropdown menu in EndNote's style window. You can add as many as you wish.

- Harvard (UTS) and AGLC are not initially in the *Select Another Style* list (there may be other versions of Harvard **which you should not use**). Add them to the list from UTS Library's website: click on *Referencing* in Quick Links, then *EndNote*, then *Referencing Styles*.

5.2 Adding more reference styles

- Harvard (UTS) style can be saved into EndNote from the library's EndNote web pages.

- You can also add more styles from EndNote's website by clicking on **Edit, Output Styles, Open Style Manager** and then on the **Get More on the Web** button in the bottom right corner. Download individual styles by clicking on the *Download* link next to each.

- When adding new styles, if a download window appears, select **Open with EndNote** (Firefox). In certain browsers (Chrome or Safari) the style is saved into your downloads folder. If this happens, *Control + click* on the downloaded style and **Open with EndNote**.

- The style then opens in EndNote: click on **File, Save As**. Edit the style name if necessary (there might be some unwanted text or symbols) and then click on **Save**. Close the style window in EndNote and then use *Select Another Style* to choose it.

5.3 Customising a reference style

Reference styles in EndNote are easy to customise. To edit a reference style, first select it in the style window. Then click on **Edit** (in EndNote's menu bar), **Output Styles**, then **Edit "your selected style"**. The **Edit Style** window appears (see Figure 3 below). You will see many options in the column on the left of the Edit Style window.

Figure 3: Edit style window, showing Bibliography templates
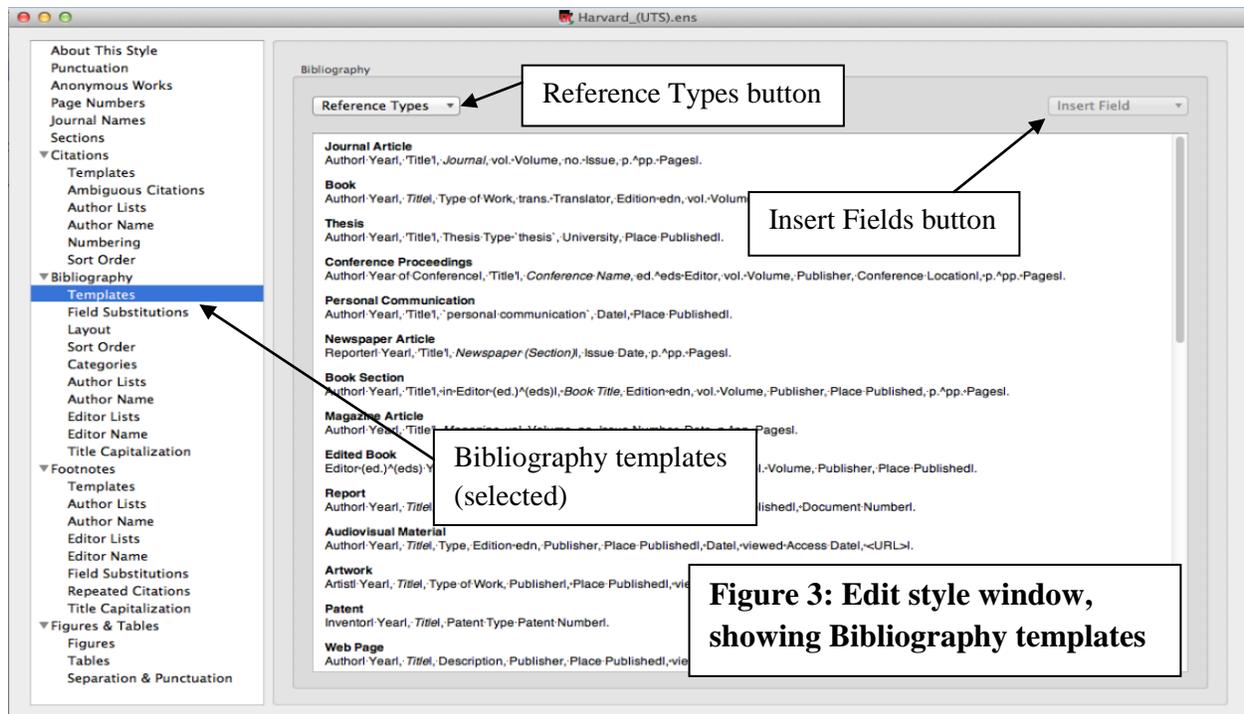
- **Anonymous Works**: some references do not have an author, and so have an empty Author field. This option tells EndNote how to cite such references in text and in your bibliography.

- **Sections**: place reference lists after each section of a document, at the end only, or both.

- **Citations - Templates**: shows how references are cited within the text of your document.

- **Citations - Ambiguous citations**: if some references have the same first author surname and the same year, this option lets you choose how to distinguish between them.

- **Citations - Author Lists**: if a reference has several authors, this option lets you choose how the list of authors is displayed when you cite the reference in text.

- **Citations - Sort Order**: if you are citing several references in the same place, this allows you to choose how they are ordered (for example, alphabetically by author, or chronologically).

- **Bibliography - Templates**: shows how your references are displayed in your bibliography. Each reference type has its own template; many styles support just a few reference types.

  o Insert new fields into an existing template using the **Insert Field** button on top right.

  o Create a template for a new reference type using the **Reference Types** button.

  o Change text to (or from) *italic*, **bold**, or underlined, using the relevant options under **Edit**.

  o Place quotation marks, brackets, commas or other punctuation where needed.

  o Insert your own text. If the inserted text refers to a Field, you should link it to the Field with a **Link Adjacent Text** symbol by using the **Insert Field** button. This is so that if

the Field happens to be empty your text will not appear. For example, if your template has **Vol. Volume**, using a **Link Adjacent Text** symbol to link "vol." to the field name "Volume" stops "vol." appearing if the Volume field of a reference is empty.

- **Bibliography - Author Lists and Editor Lists**: specify how references with multiple authors or multiple editors are displayed in your bibliography. Note that "Editor Lists" *only* governs editors in references with *both* authors *and* editors, eg Book Section.

- **Bibliography - Layout**: add text, fields (eg Research Notes) or blank lines, before or after each reference in your bibliography. Also controls if references are indented.

- **Bibliography - Sort Order**: specify how your bibliography is ordered, for example by order of appearance (used for a numbered style), or alphabetically by author.

- **Categories**: group different reference types together as categories in your bibliography.

- **Footnotes**: determines the format of references that are cited in footnotes.

- **Figures and Tables**: choose whether figures or tables appear in-text or as a list at the end, and choose the location of figure labels and captions (see Section 8).

6.   *Saving references from UTS Library Catalogue and Journal Databases*

6.1   Connection files & Online searching

References can be electronically transferred into EndNote from library catalogues using *Online Search* with *Connection Files*. EndNote comes with many connection files, but due to access restrictions by commercial databases, **it is not possible to use most of EndNote's database connection files**. Connection files work fine with most library catalogues and the *PubMed* database, because access to these is usually free. There are two methods of using Online Search:

In the first method, click on the **Online Search Mode** icon in the menu bar (see Figure 4 below) and select a library from the *Online Search* list (click on ***more…*** to see the full list). UTS Library is listed as "U Technology Sydney". If you don't see "U Technology Sydney", go to the library's EndNote web page for instructions to add it to the list of connections.

- When you select an online search, you'll see its search window at the top of your EndNote library. Select which fields to search, and type in your search terms. Then click on **Search.** The **Confirm Online Search** box will appear with the number of retrieved titles. Make sure your list of titles is not too large (less than 30 is best) then select **OK**. You may need to modify your search (eg by adding extra search terms, or best of all search for a known item in the catalogue by title) to lower the number of results.

Figure 4: Online Search Mode
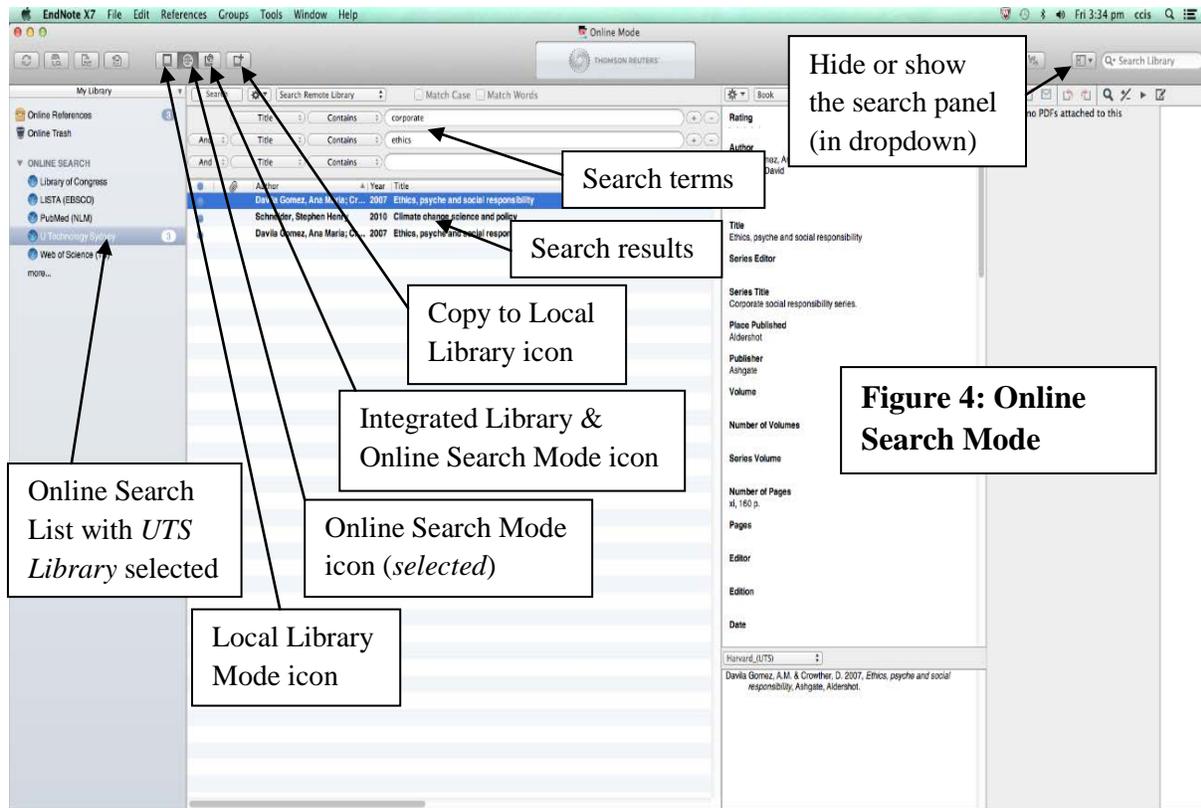
- Click on a search result and then on the **Copy to Local Library** icon (see Figure 4) to add it to your library. Hold down the *Command* key while clicking to select more than one at a time.
- **Always check recently transferred references for errors**.
- Return to your library by clicking on the **Local Library Mode** icon.

In the second method, click on the **Integrated Library & Online Search Mode** icon (see Figure 4) and choose an online search as above. *All* found references are *automatically* added to *All References* (ie to your main EndNote library). You will need to delete any reference you don't want to keep. This method is simpler but you may end up doing a lot of deleting which can be very time-consuming, and which is avoided by the first method.

6.2   Direct export from some journal databases into EndNote
Many journal databases allow "direct export" of citations into EndNote. The table below gives brief instructions for some of these. If using Firefox, choose **Open with EndNote** (tick the box that tells the browser always to open this type of file with EndNote). With Chrome or Safari the references are saved into your downloads folder. If this happens, *Control + click* on the downloaded file and **Open with EndNote**.
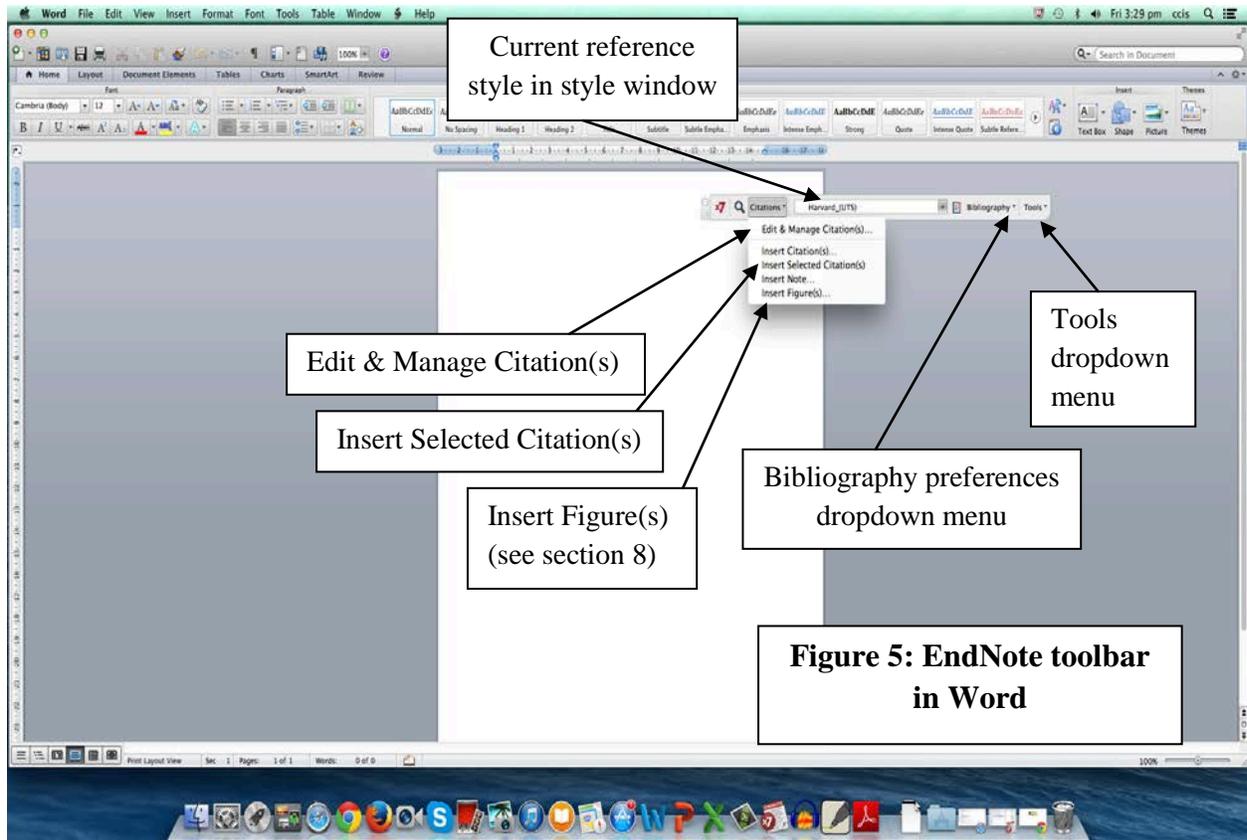
Academic Search Complete, **Business Source Complete**, **CINAHL, ERIC, MedLine** & other **EBSCOhost** databases: click on blue folder icon to right of article; click on *Folder View* in right margin; select items & click on *Export* icon. Select *Direct Export in RIS Format*, click on *Save*.
Cochrane Library (Wiley): Select citations from Search Results list and click on *Export selected* **OR** open a result and click on *Export Citation for this Article* link (on right). Choose *Citation & Abstract* as File type, and appropriate Export type. Then click on *Export Citation* button and *Save* the export file to your desktop or downloads folder. Then go to EndNote and click on *File, Import*. Choose your saved file as the Import File, and use the Import Option dropdown to choose *Other Filters* and then *Cochrane Library (Wiley)*. Then click *Import*.
Expanded Academic ASAP, Legaltrac, & other **Gale** databases: Select citations, then click on the *View All* button in the Saved Documents section on top right. Then click on *Citation Tools* in the Tools area on the right. In the Export section, choose *EndNote* and then *Open* the results file.
Factiva: this is quite complex, and *does not work on a Mac*. Instructions for PC are on the Library website: http://www.lib.uts.edu.au/question/20387/how-can-i-export-factiva-to-endnote.
Google Scholar (**http://scholar.google.com**): Click on the *Settings* symbol above the Google logo. In the *Bibliography Manager* section use the dropdown menu to choose "Show links to import citations into EndNote". Click on *Save*. Your search results will now each have an *Import into EndNote link*. Click on the link and then *Open* or *Open with EndNote*.
HighWire Press: Select citations; select *download to citation manager* option just above first citation; click on *Go* button. Click on *download citations to Citation Manager* link; choose *EndNote* from list of formats. If asked, choose to *Open* the results file.
IEEExplore: Select citations; click on *Download Citations* icon, choose *Citation & Abstract* and *EndNote, ProCite, RefMan*. Click on *Download Citation* button. You may need to change conference reference types to "Book Section" to see conference title in the Alternate Journal field.
Informit databases: Select citations; click on *Save* (above results list); select *Complete Record* in Fields to Save, and *Short Field Labels* in Field Label Format. Change Output Format to *EndNote Direct* (not *EndNote*) and click on *Save* button.
JSTOR: Select citations, click on *Export* link (just above results list). In the *Select a format* section, click on the *RIS file (EndNote etc)* link. If asked, choose to *Open* the results file.
OVID Databases (**Medline**, **AMED**, **BIOSIS**, **Compendex**, **INSPEC**, **PsycINFO**, etc): Select citations; click on *Export* icon just above results list. Choose *Export to EndNote* and *Complete Reference*. Click on *Export Citations* button. You may need to change some reference types. If asked to *Choose an Import Filter*, scroll until you find the database name followed by (OVID). If you don't see your filter, check EndNote's filters page: www.endnote.com/support/enfilters.asp
Project Muse: Click on *Save Citation* link under each result, or on the *Save All Citations* button. Click on the *Export Saved Citations* link in top left. In *Option 2: EndNote* section, click on *Export to EndNote*. If asked, choose to *Open* the results file.
ProQuest Databases: Select citations; click on *Export/Save* icon on right and choose *EndNote, Citavi, or Reference Manager*. Click on *Continue* button. If asked, choose to *Open* the results file.
Science Direct (Elsevier): Select citations; click on *Export* dropdown above results list and in Export file section choose *RIS (for EndNote etc)*. Then click on *Export* button and *Save* the export file (it doesn't matter where). *Open* the saved file *with EndNote*.
Scopus (Elsevier): Select citations; click on *Export* dropdown above results list. Choose *RIS Format*, and choose to export *Citations and abstract information*; then click on *Export* button. If asked, choose to *Open* the results file.
Web of Science Core Collection: Select citations; then use the dropdown above the results list to choose *Save to EndNote desktop*. In Record Content dropdown, choose *Full Record*. Click on *Send* button. If asked, choose to *Open* the results file.

7. *Transferring references into a Word document and creating a bibliography*

Installing EndNote automatically creates an extra toolbar in *Word* (see Figure 5 below; if you don't see the toolbar, check under **View, Toolbars**). The icons in the toolbar enable Word and EndNote to interact. Extra options are also created in *Pages*.

7.1   Inserting in-text citations

- In Word you should see the **EndNote Toolbar**; see Figure 5 below. Place your mouse pointer over each of the icons to show its function.

- The current reference style of the Word document is indicated in the Style window in the toolbar, and can be changed using the dropdown menu as in your EndNote library.

- Return to EndNote and choose the reference you wish to insert. To select more than one at a time, hold down the *Command* key.

- Return to Word and place the cursor in the document where you wish to cite the reference(s).

- Click on the **Insert Selected Citation(s)** icon in the EndNote toolbar. The selected citation(s) will appear as an in-text citation, and also in a reference list created at the end of the document.

- EndNote usually automatically formats in-text citations into your chosen style, and automatically creates a formatted bibliography from the inserted citations. This is called *Instant Formatting*, or *Cite-While-You-Write (CWYW).*

- Instant Formatting can be switched off and on in Windows by clicking on the *Bibliography* dropdown in the EndNote toolbar (see Figure 5), then on the *Turn Instant Formatting On/Off* option. Switching off the instant formatting can be useful if your document is large and contains many citations. When instant formatting is on, you may notice that adding each new citation causes Word to pause for some time while EndNote updates all the citations in the document: switching off the instant formatting stops this from happening. Citations are inserted in unformatted format (see Section 7.5); you can periodically format them all in your chosen style using **Update Citations and Bibliography**.

Figure 5: EndNote toolbar in Word

Labels on figure: Current reference style in style window; Edit & Manage Citation(s); Insert Selected Citation(s); Insert Figure(s) (see section 8); Tools dropdown menu; Bibliography preferences dropdown menu

## 7.2 Creating a bibliography and changing reference style

- EndNote normally creates the bibliography automatically, but if any citations have not been automatically formatted, click on **Update Citations and Bibliography** in the *Bibliography* dropdown in the toolbar.

- To change the reference style of your document, just use the dropdown in the style window.

7.3 Adding page numbers to in-text citations

- Click on a formatted citation in your Word document. It should be "greyed out". This is due to the hidden "field codes" that enable Word and EndNote to communicate. You may need to click next to the citation and use left or right arrows to move your cursor onto it.

- Click on the **Edit & Manage Citation(s)** icon in the EndNote toolbar. The **EndNote Edit & Manage Citations** window then appears (see Figure 6 on next page).

- In Harvard (UTS) style you can type page numbers into the **Pages** box, and then click **OK**. However, these page numbers are not always displayed in other reference styles.

- An alternative method, which works in all reference styles, is to type page numbers, plus any associated text and punctuation, into the **Suffix** box (eg: , p. 9). Then click on **OK**.

7.4   Other changes to in-text citations

- Remove a citation by selecting it and then using the dropdown *Edit Reference* menu (see Figure 6 below) to select **Remove Citation**. Then click on **OK**.

- Instead of (Higgs 2001), you may want your formatted reference to read differently. To make the changes listed below, highlight the reference, click on **Edit & Manage Citation(s)**, and use the *Format* dropdown menu (see Figure 6) as follows:

    o   … according to Higgs (2001)… Select **Exclude Author** or **Display as Author (Year)** depending on whether you've already typed the author's name into the text

    o   … this discussion in 2001 (Higgs)… Select **Exclude Year**

    o   … this theory (see also Higgs 2001)… Type "see also" plus a space into **Prefix** box

    o   (Higgs 2001, chapter 3)… Type "chapter 3", with comma & space, into **Suffix** box

    o   …in 1956, Brown (cited in Higgs 2001, p. 89)… Type "cited in" plus space into **Prefix** box, *and either* ", p. 89" into the **Suffix** box *or* "89" into the **Pages** box

    o   Reference to Higgs hidden in text, only appearing in bibliography (select **Show Only in Bibliography**). This is not advised, because the invisible field codes remain in the text, and it can be difficult to relocate these hidden in-text citations.

Formatting drop down menu

Drop down *Edit Reference* menu (for removing in-text references)
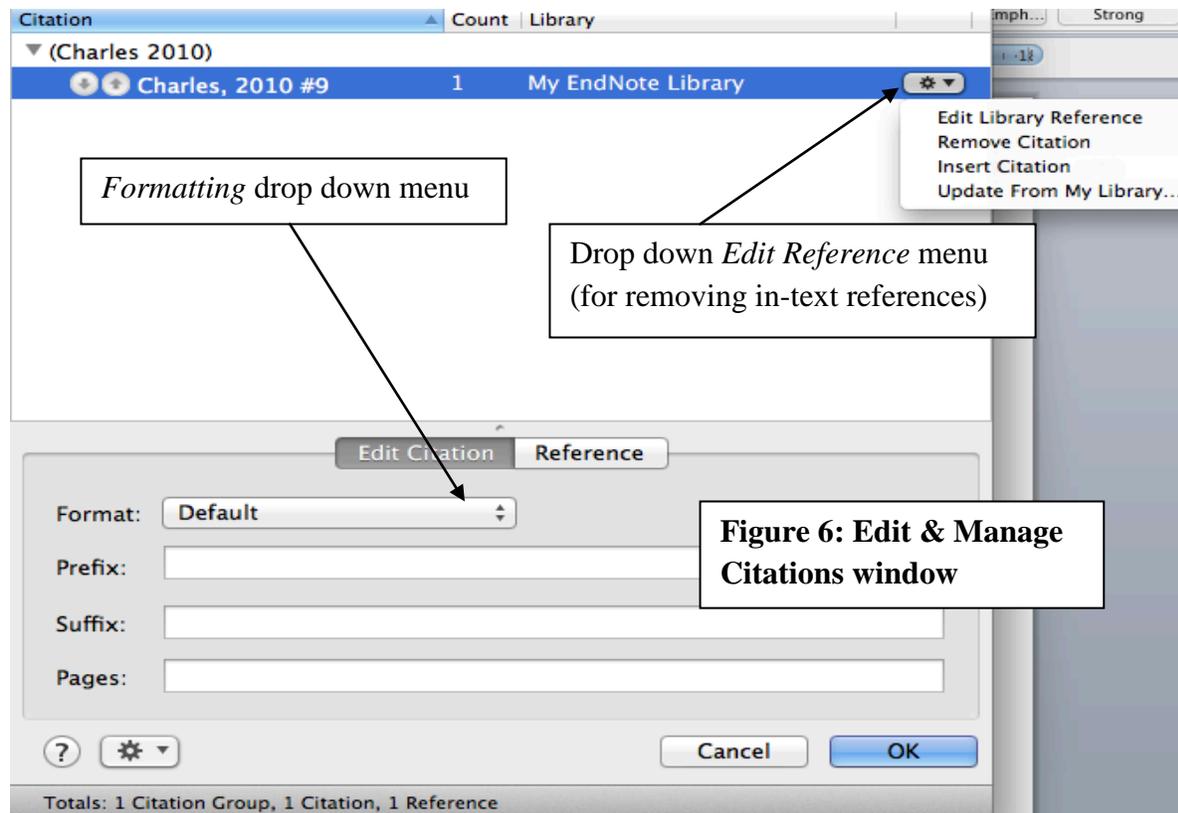
Figure 6: Edit & Manage Citations window

7.5   Unformatting a document & Merging Word documents

- It is sometimes necessary to *unformat* your document. Unformatted documents have no field codes and no bibliography; also, all the in-text citations are in "temporary format" such as {Smith, 2000 #37}.

- To unformat a document, click on **Convert to Unformatted Citations** in the *Tools* dropdown menu on the toolbar.

- To restore formatting for the in-text citations, and recreate the bibliography, click on **Update Citations and Bibliography**. This also adds back all the field codes. Your EndNote library must be open when you do this.

- This is very useful if you have several separate documents, each with an EndNote generated bibliography, and you want to merge them into one document with a combined bibliography at the end. To do this, open a new blank document, and, in order: open each separate document, unformat it, copy the whole unformatted document, and paste it into the new document. When all the unformatted documents have been pasted one after the other into the new document, click on **Update Citations and Bibliography** to restore all the in-text formatting and to create the combined bibliography at the end.

7.6   Removing Field Codes

- Once you are ready to publish your document, you can create a "clean" version of it, without any of EndNote's hidden field codes (these are what cause all the inserted text to show as grey when you click on it), but retaining the properly formatted citations and the formatted bibliography. A clean version is often required by publishers of journal articles.

- To create a copy of a document without field codes, click on **Convert to Plain Text** in the *Tools* dropdown menu on the toolbar.

- *Your original document, with the field codes, is still preserved*: and this is still the main version of your document so it is important to save it. If at a later time you need to add more citations, or edit citations or the bibliography, you will need to do this in the original document using EndNote, and then create a *new* copy without the field codes.

7.7   Making a standalone bibliography in Word from part or all of a reference library

- To make a list of all (or just some) of your references, first open your reference library.

- Choose the reference style you require. Note that "*Annotated*" style displays abstracts, while "*Show All*" style displays all the information on each reference card.

- Select the references you want, or use *Command +A* to select them all.

- *Control + click* on the selected references and then choose *Copy Formatted*.

- Paste the copied references into a Word document where you want the list to appear. Note that **this list has no field codes, it is just normal Word text** and can be edited as such.

7.8   Creating a Subject Bibliography

You can create a bibliography from your Library that is divided into subsets of your choice. For example the subsets might be the different reference types, or keywords, authors, or publishers.

- In EndNote, click on **Tools, Subject Bibliography**.

- From the list of fields, choose the ones you want your generated reference list to be divided into (it is normally best only to pick a small number, such as one or two, but you can pick as many as you wish), then click **OK**.

- A list of the different possibilities for these fields then appears. You can **Select All** of these, or make a choice. Then click **OK**.

- Your subject bibliography appears. You can select the reference style, or change layout (however, if you change the layout, the style of your bibliography might not be totally correct any more). Use *Print Preview* to see how the references will be displayed. You can then print or save (in Rich Text Format, which is similar to Word).

8.   *Inserting Figures with Captions into your document*

EndNote allows you to attach figures to references, in formats such as jpg, gif, tiff and bmp. These figures can be inserted by EndNote into your Word document, automatically adding both a caption to the image, and an in-text citation, for example (Figure 183). The actual images are stored outside your reference library in the same .*Data* folder that contains any attached pdf files (see Section 4.1). A linked mini-image appears in the *Figure* field of the relevant reference template. Unlike attaching files (Section 4), only one figure can be attached to each reference.

8.1   Attaching a Figure to a reference in your EndNote library

- Open the reference template and click on the **Attach Figure** icon (see Figure 2).

- Use **Choose File** to locate and choose the graphic you wish to attach.

- You should see a mini-image of the graphic appear in the *Figure* field of your reference.

- Type the image caption into the *Caption* field. Leave this field empty if you wish.

- Close the reference and save changes. You'll see a tick in the Figure column of your library (you may need to change your Display Fields to show the Figure column: see Section 10).

- **Note**: you cannot edit your caption field text once you have closed and saved the reference,

except by deleting the inserted figure (see last dot point in Section 8.2 below), then changing the caption in your EndNote reference, and then reinserting the figure.

8.2   Inserting (and referring to) a Figure into your document

- In your Word document, place your cursor where you want the in-text figure citation, eg (Figure 183). Click on **Insert Figure** is in the *Citations* dropdown menu on the toolbar (see Figure 5).

- Type a word from *any field* of the reference (including the caption) into the **Find** box, and click on **Search**. EndNote will find all image references containing this word in any field.

- Select the reference with the figure you want to insert and click on **Insert**.

- A figure citation, eg (Figure 183), is inserted in the text. The figure itself, with label (in this example: Figure 183) and caption, will be at the next paragraph break, or at the end of the document, depending on the style.

- As you insert more figures, more figure citations will be inserted into the text, and the figures with their labels and captions will appear. Figure citations and labels are automatically renumbered to preserve correct numerical order throughout the document.

- The inserted images can be manipulated (eg made larger or smaller) in the same way as you would with any normal image in your document text.

- To delete a figure, select and delete all of its *in-text figure citations* (not the figure itself), eg (Figure 183), *including parentheses*, one by one. Then click on **Update Citations and Bibliography** to remove the figure itself.

8.3   Changing the Figure attached to an EndNote reference

Open the reference and attach the new figure. This automatically replaces the old image in the *.Data* folder containing the figures themselves (see Section 4.1). If you have already inserted the figure into a Word document you'll need to delete the old figure citations in Word and reinsert them (see last dot point of previous section).

9.   EndNote Online

EndNote Online (formerly known as EndNote Web) is a web-based EndNote library. You can transfer references between your computer-based EndNote library (also called your "desktop" library) and your EndNote Online library, and insert references into Word from EndNote Online. *EndNote X7 allows you to sync your EndNote Online library with EndNote libraries on different computers*; this can be very convenient if you need to access your EndNote library from several

different locations.

- To use EndNote Online you must register online: go to the *Web of Science* database (via the *Find Databases* link on the library homepage) and register via the *EndNote* link. You must have an email address and you can choose your own password.

- To allow automatic transfer of references between your main ("desktop") EndNote library and your EndNote Online library, open your "desktop" EndNote library and click on the **Sync library** icon in your library's menu bar. In the preferences window that appears, make sure you see, or type in, the following:

  o In the E-mail Address box: the email address you used to register for EndNote Online

  o Type in the password you created when you registered

  o It's a good idea to remove the tick from the box labelled *Sync Automatically*, this stops the library trying to sync when you don't want it to

  o Then click on **OK**.

  See also the *Sync* preference in Section 10 below.

- Although this is not normally necessary (because you would normally using you desktop library and the **Sync** icon), you can log in to your EndNote Online account directly, via **www.myendnoteweb.com**

- You can add, edit and group references in your EndNote Online library more or less like you do in your main ("desktop") EndNote library, including by direct export from many databases and by transferring references from your "desktop" library (see above).

- To insert references into a Word document directly from EndNote Online, click on **Cite While You Write Preferences** in the *Tools* dropdown menu on the toolbar, then **Application**. Select *EndNote online* using the drop-down, and make sure the EndNote Online details are the same as in the EndNote preferences listed in the previous dot point. Then click on **OK**. You'll see some of the EndNote icons change in Word. To insert a citation use the *Find Citations* icon to search your EndNote Online library.

- Note that the list of styles in EndNote Online is not the same list as in EndNote, although both have many in common such as Harvard (UTS), AGLC and APA.

10.   *Editing EndNote Preferences*

EndNote can be customised in several more ways by choosing **EndNote X7** in the EndNote menu bar at the top of the page, then **Preferences**.

- Choose which reference library is opened automatically when you start Endnote, by clicking

on **Libraries** in the **Preferences** window.

- Change the default reference type for a new reference template (from *Journal Article*) by clicking on **Reference Types**.

- Create a new reference type, or modify existing reference types, by clicking on **Reference Types**, and then on **Modify Reference Types**. You can also **Import** a whole set of new reference types, for example the legal reference types used with the *AGLC* style.

- Use **Sorting** to ignore certain words in titles or in author names when ordering your bibliography (eg you may want *de Gaulle* with the G surnames rather than the D surnames).

- Use **Change Case** to tell EndNote how to capitalise certain words. This is only needed for reference styles which have capitalisation built into the style. It is not needed for most styles, like Harvard (UTS) and AGLC, which leave capitalisation of words as entered.

- Use **Display Fields** to change what is displayed in the columns of your reference library. For example, you may wish to display the *Record Number*. Record numbers are allocated when references are added to a library, so your most recently entered references will have the largest record numbers and can thus be easily identified. You may also wish to display the *Figure* column, which shows (using ticks) which references have attached figures.

- Use **Sync** to choose how your EndNote library synchronises with your EndNote Online library (see Section 9).

- Use **Find Full Text** to set your Open URL Path (see Section 4.2).