

EndNote X9: Getting Started (Windows)

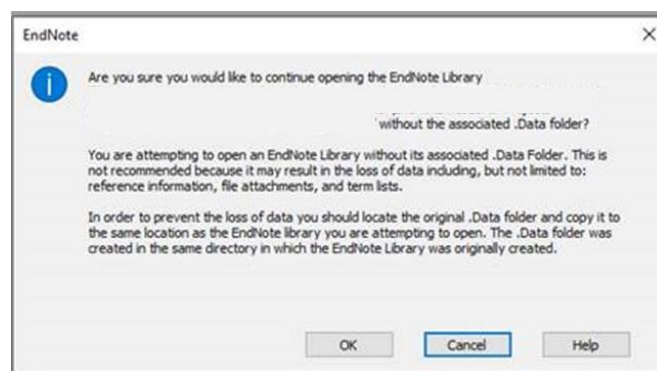
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Libraries created in Version X9.3.2 and above will not open in older Windows versions or Mac versions X9.3.2 and earlier.

WINDOWS VERSIONS X9.3.3 AND ABOVE

- From late 2019, Apple no longer supported 32 bit software. EndNote Mac changed to a 64 bit program. This means libraries created in Mac version X9.3.2 and above were not compatible with any Windows version earlier than X9.3.2 or with earlier Mac versions.
- Windows EndNote version X9.3.3 and above are also 64 bit versions. If you upgrade to this version, you can **only open libraries created with this version or on a Mac X9.3.2 and above.**
- A common error you will see when trying to open older libraries is:-



- You can open libraries created in older versions in the newest version. They will be converted to the newest format. Once converted however, the libraries will no longer open in earlier versions. This process **can not be reversed**. Always create **backups of your libraries before upgrading**.
- Libraries from different versions can be shared using EndNote Online. Information about this is available on our website <https://web.library.uq.edu.au/research-tools-techniques/referencing-software/endnote/using-endnote/syncing-and-sharing-your-endnote-library>

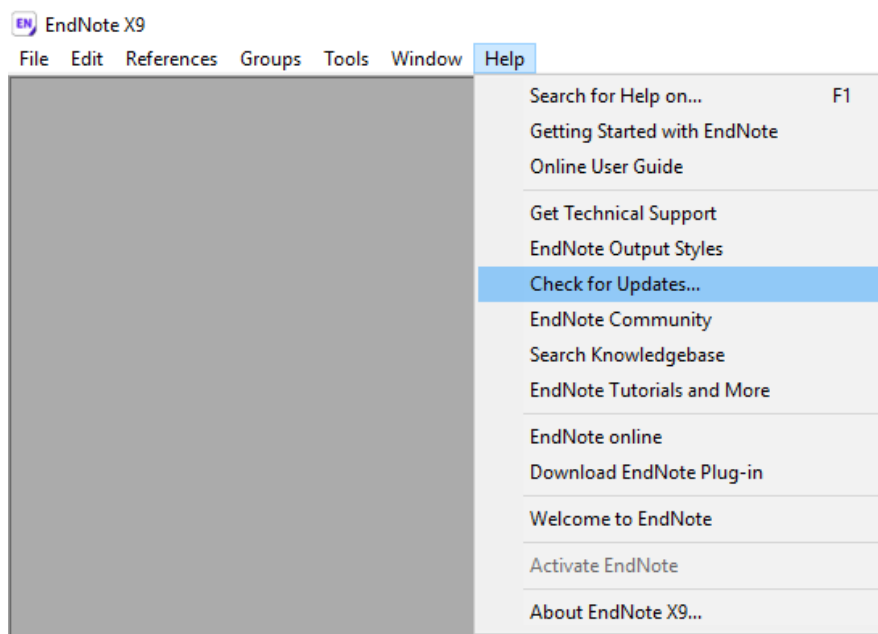
UPGRADING TO NEW VERSIONS:

- It is not always necessary to upgrade to latest version. In most cases, the previous version will be fine to use.
- If upgrading, always create a **backup** of your libraries first.
- When to upgrade to a new version:-
 - You are two or three versions behind the most recent one.
 - There have been significant improvements with the new version.
 - You have been having issues with an older version.
 - You have upgraded your device.

- Your current version is no longer compatible with updated versions of Microsoft Word or your operating system.

CHECKING FOR UPDATES

1. In EndNote, click on **Help** then choose the **Check for updates** option.



2. Follow on the on screen prompts.

BACKING UP YOUR LIBRARY:

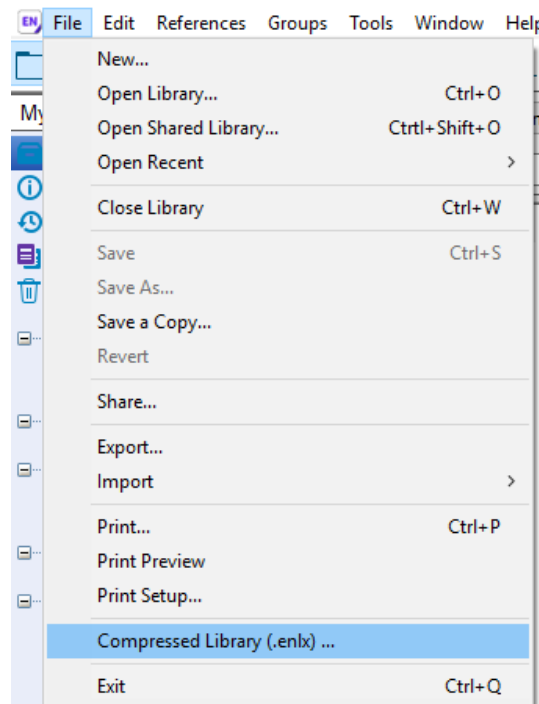
- Save 3 copies in 3 locations
- Do not use a backup as your working library unless it is needed.
- Using the **Compressed Library** option in EndNote is recommended for creating backups.

Creating A Compressed Library:

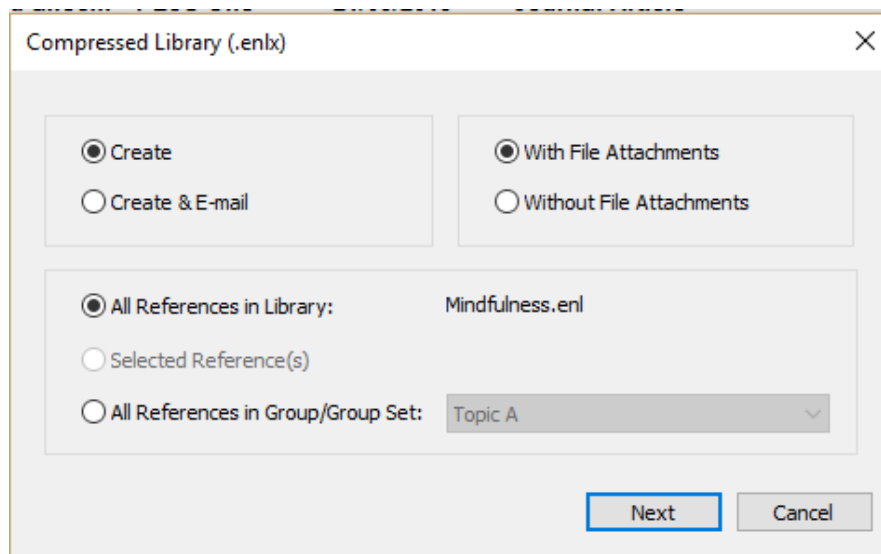
When an EndNote library is created, two files are produced. One has an .enl file extension eg. My Thesis Library.enl and the other is a folder with the same name but ending in .DATA eg. My Thesis Library.DATA. These files must remain together for your library to fully function.

Note: This option will not work for libraries that are 4GB or larger.

1. In EndNote, have your library open.
2. Click on **File > Compressed Library**.



3. A **Compressed Library** window will open. Click on **OK**.



4. Give your compressed library a name. For a backup, we recommend adding "Backup" and the date to the name eg. BACKUP_My_Thesis_Library 3May2018. Click on **Save**.
5. The file will now be saved. Add to your backup locations.
6. To open the file, double click on it on any computer with EndNote installed.

Recommended:

- Post graduates have access to the UQ server which is backed up every day with a 30 day archive
- Internet based email account
 - Quarantine it from your online shopping, Facebook, banking etc.
 - Computer hard drive

- DO NOT BACK UP YOUR ENDNOTE TO THE FOLLOWING
 - USB (USB is ok for file transfer)
 - The computer desktop
 - If something goes wrong with your computer, there is very little chance to retrieve what was on your desktop
- Frequency of back up is at the discretion of the user, but it is recommended at least once a week

File Naming:

- Make it descriptive but not too long or you may eventually get an error message
- No spaces in the file name. Use under scores or hyphen if you want to separate words or even capitalize the first word.
- Include the date in the filename when backing up, using the YY_MM_DD format. This lets you know the last time you backed up your library and also helps when sorting files.
 - Physio_4_pead_burns_16_09_26
 - Physio-4-pead-burns_16_09_26
 - Physio4PeadBurns_16_09_26

Passwords:

- Minimum of 12 characters, alphanumeric with characters, upper and lower case
 - As an example - Her\$t0n_L!br@ry951
 - The longer the password, the more variation on possibilities and the harder it is to “crack”

Note:

- Constantly assess the risks
- Evaluate the inconvenience and stress of losing your data/thesis/EndNote library
- Evaluate your security measures regularly
- Make sure you don't breach any ethics approval with your research data management

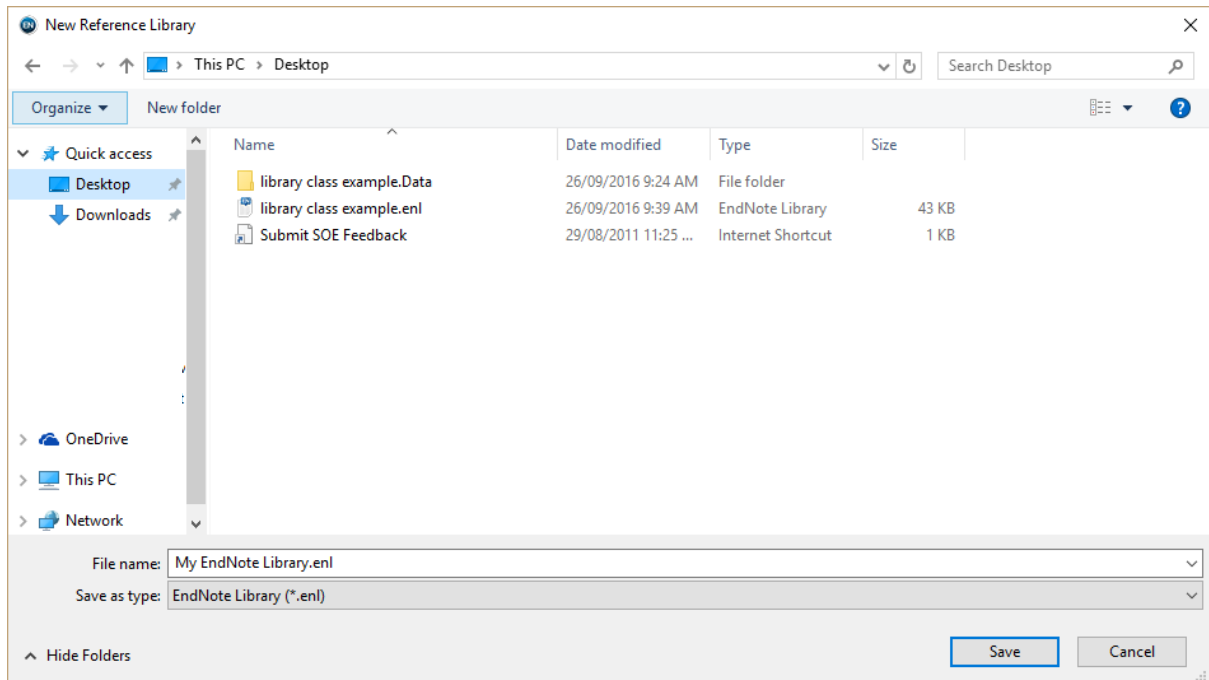
CLOUD STORAGE:

Examples: Dropbox, OneDrive, Google Drive, iCloud, UQRDM

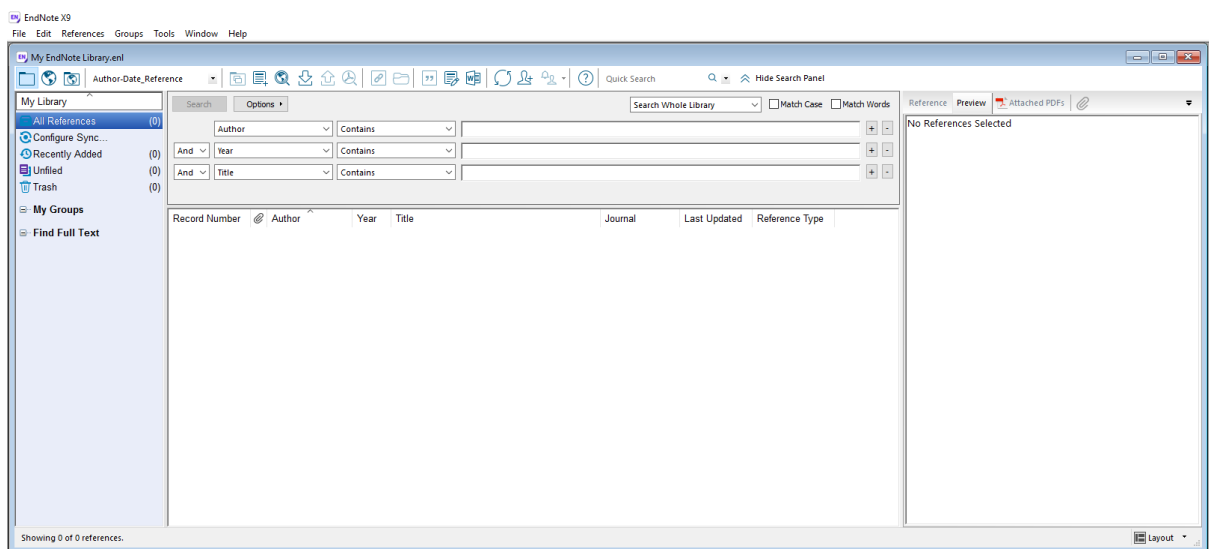
- **Do not work on your EndNote library from a cloud storage drive.** Issues such as corrupted libraries can occur.
- Cloud storage can be used as storage, eg. backing up, or as a way of accessing your EndNote library from different locations.
- To work on your EndNote library from cloud storage, first download it or copy it to your local device. You can then work on it. When finished, add the saved version back to your cloud storage.

CREATING A NEW ENDNOTE LIBRARY:

1. Click on **File > New**



2. Choose where you want your library saved and give it a name. Click on **Save**.
3. You will now have a blank library. Bottom left hand shows – **Showing 0 out of 0 references**.



A library is a file where you store your references. You are able to create as many libraries as you wish.

ADDING REFERENCES TO YOUR LIBRARY:

Direct Export:

- Direct export is where you can add references to your EndNote library by exporting them from a search tool eg. database, UQ Library Search, Google Scholar
- Different search tools handle exporting to EndNote in slightly different ways. Two of the most common methods are:-
 - Clicking on an icon (often a folder) to add required references to a folder. You then go to the folder to export the references.
 - Clicking a check box then clicking on an **Export** link to send the references to EndNote.

Exporting From UQ Library Search:

Make sure you are logged into the UQ Library Search.

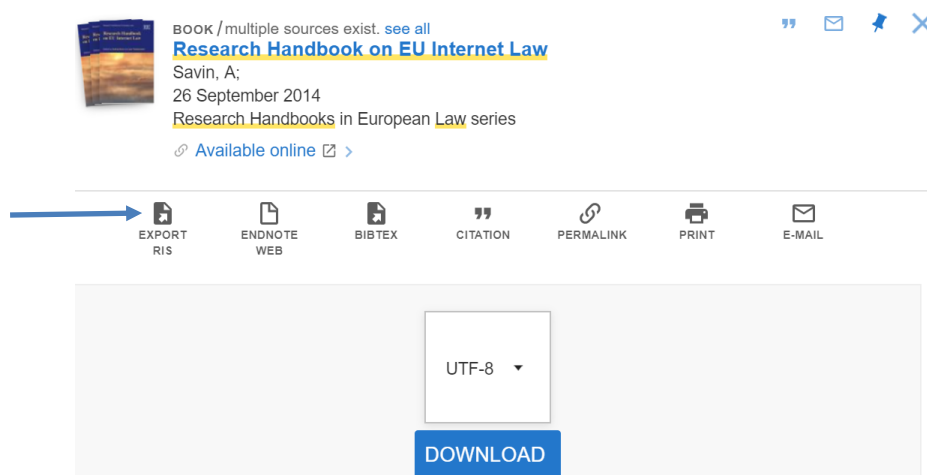
Log in to access full text, more search results and more services. Refresh this page if you are logged in but still see this message [Log in](#) [DISMISS](#)

Single Reference:

1. With the reference you wish to export, click on the **Save, email, cite, export record** button (three horizontal dots) that appear on the right of the record.

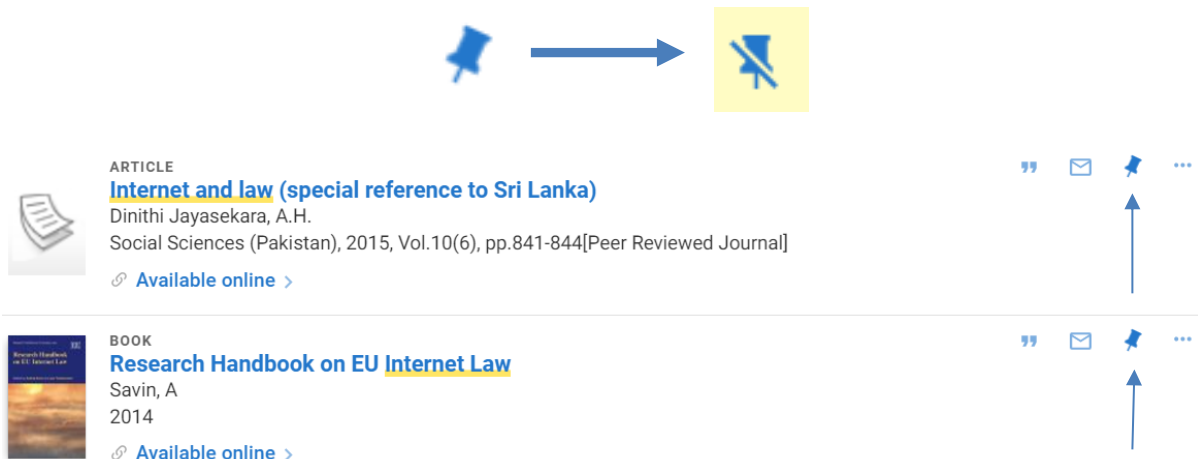


2. A number of options will then appear. Click on **Export RIS** then click on the **Download** button.

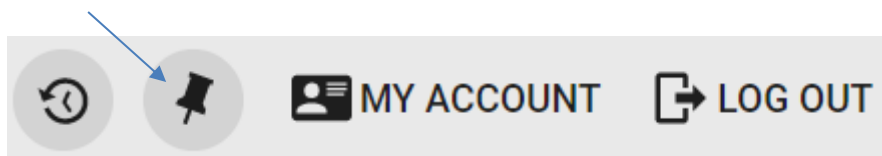


Multiple References:

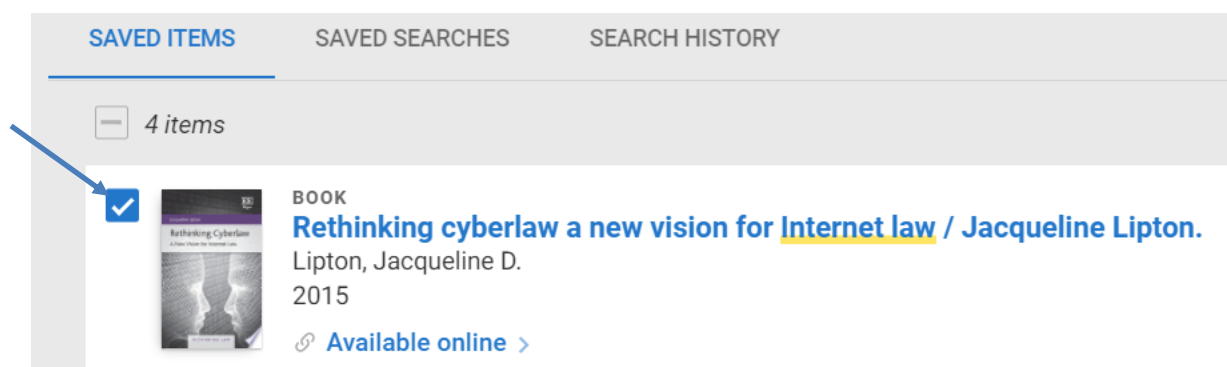
1. From the results of your search in the UQ Library Search, select the references you want to export into EndNote. To select a reference, click on the pin icon that appears on the right of each record so it appears as crossed out.



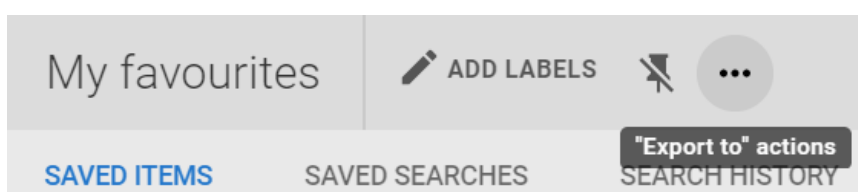
2. The references will be added to **My Favourites**. Once all the references you want are selected, click on the **My Favourites** pin icon at the top right corner of the screen.



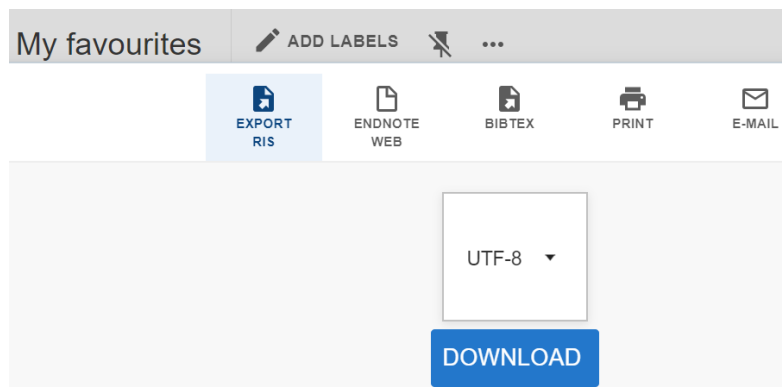
3. You will then be taken to the **Saved Items** area of your account which will list your selected items. Choose the ones you wish to export to EndNote by checking them.



4. Click on the **"Export to" actions** icon (three horizontal dots) at towards the top of the screen.



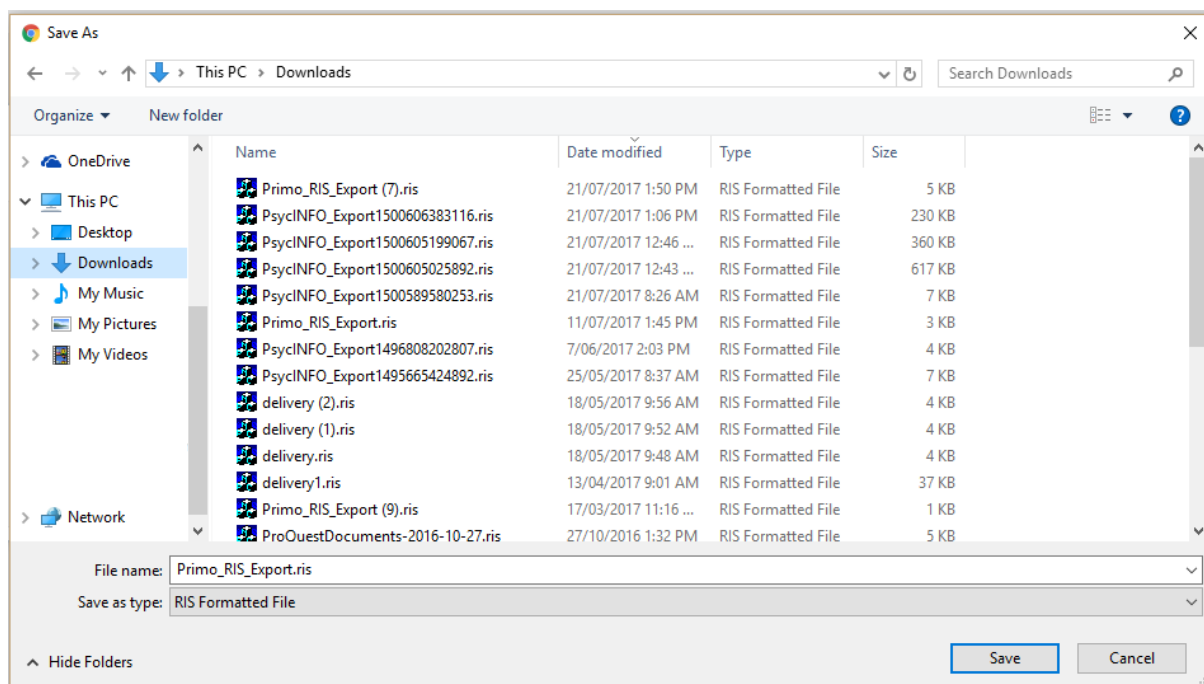
- Click on the **Export RIS** icon. Click on the **Download** button that appears.



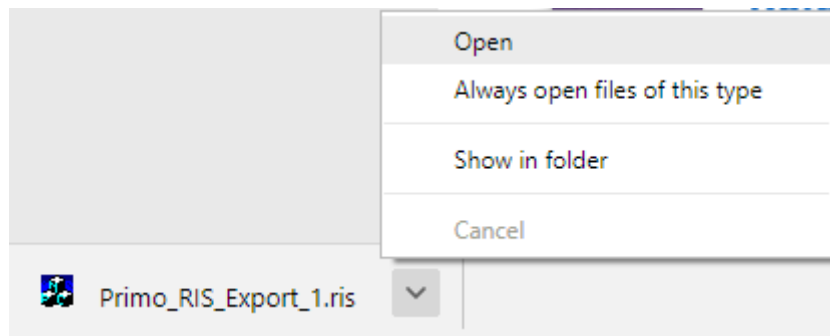
- Chrome and Firefox handle the direct export differently.

Chrome:

- A **Save As** window will appear. Choose where to save the file eg. Downloads



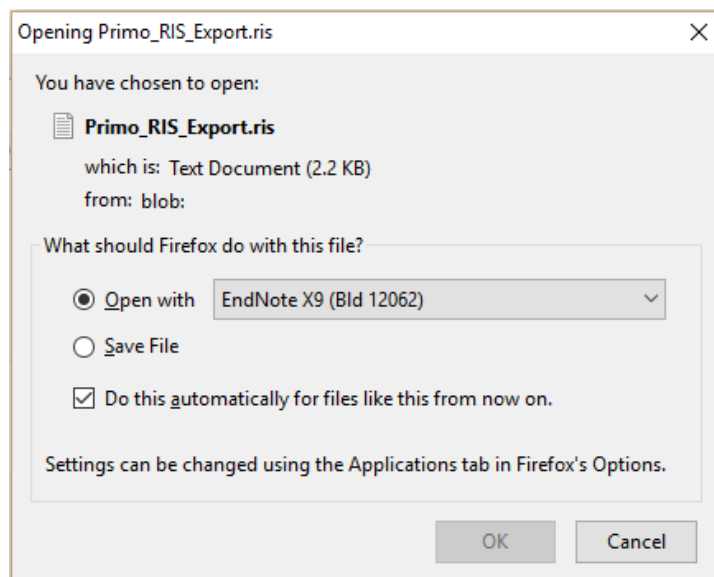
- The file will then be downloaded into this folder and display as a button at the bottom of the above window.
- Click on the arrow to the right on this button and choose **Open**. (You can also click on **Always open files of this type** then click on **Open** to have this file type download automatically into EndNote in the future).



- The records will now be sent to EndNote.

Mozilla Firefox:

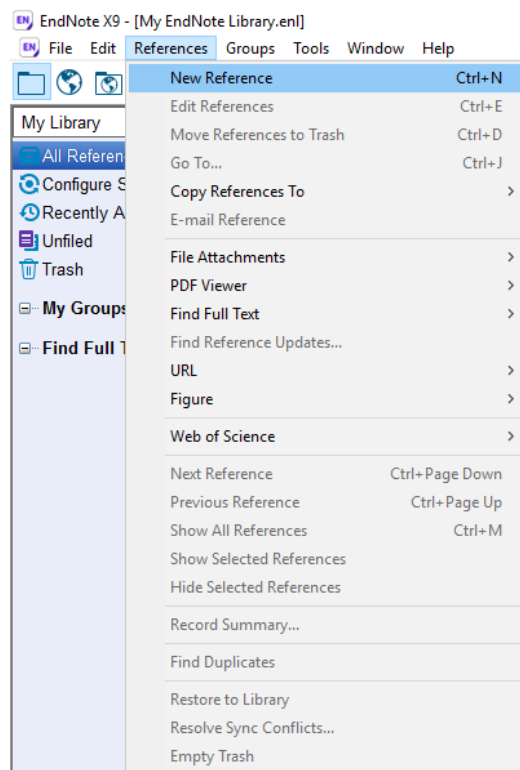
- A window will appear asking what you'd like to do with the file. Go with the default option and click on **OK**.



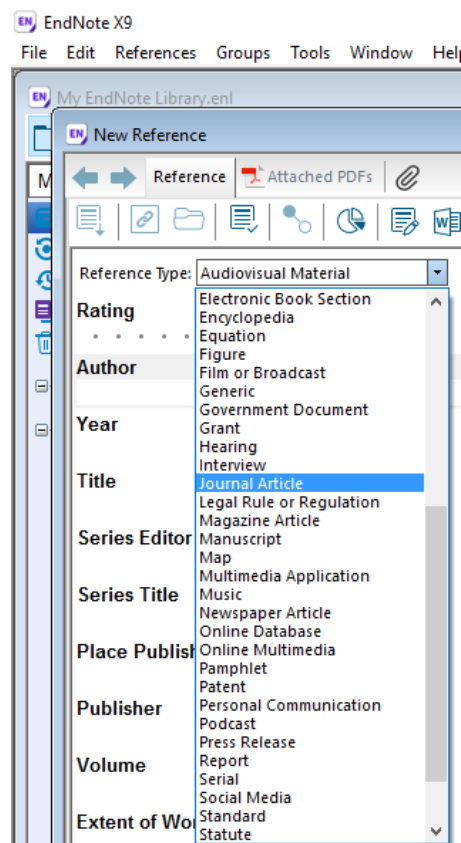
- The references will now be added to EndNote

Manual Entry:

1. You can add manually add references, such as websites, to your library.
2. Click on **References > New Reference**.



- Another window will open. Choose the type of reference you are adding eg. book, journal article from the **Reference Type** drop down menu.



4. Enter the information in the relevant fields. To move between fields, click on them or use the Tab button. It is not necessary to fill in all the fields.
5. Some fields require information to be entered in a certain way to ensure it appears correctly in the reference list.

AUTHOR FIELD:

- Be consistent in how you enter author names.
- Always enter the family name first followed by a comma then first name(s) and initials eg. Granger, Louise.
- If there is more than one author, enter each author on a new line.
- If you are using the initials of an author, put a full stop after it eg. Granger, L. M.
- If it is a corporate author, put a comma at the end eg. Tourism Queensland,
- Other examples of authors: - Granger, Louise M.
- de la Salle, George
- Smith, G.

TITLE FIELD: (BOOK, JOURNAL)

- Do not enter a full stop at the end of a title. Other punctuation that is part of the title eg. an exclamation mark, question mark can be used.
- Enter the title using the capitalisation format of the referencing style you are most likely to use eg. APA – sentence case
- Journal names can use abbreviated or full titles, depending on the style.

OTHER FIELDS:

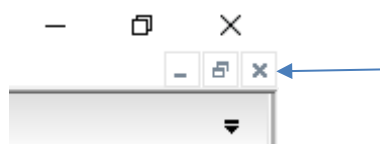
VOLUME NUMBER: just enter the number eg. 123

PAGES: just enter the page numbers eg. 23-34

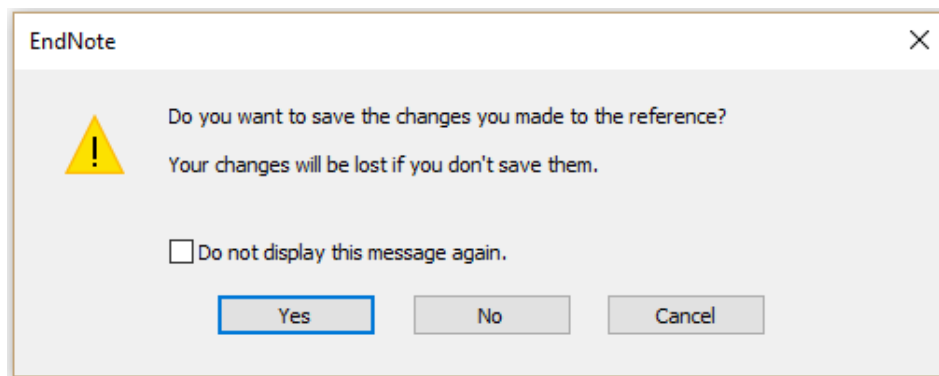
YEAR: just enter the year eg. 2010

PLEASE NOTE: EndNote will add any necessary labels required by the style you choose.

6. To save the information, click on the lower cross in the top right corner of the window. (If you click on the larger cross at the top you will close EndNote down).

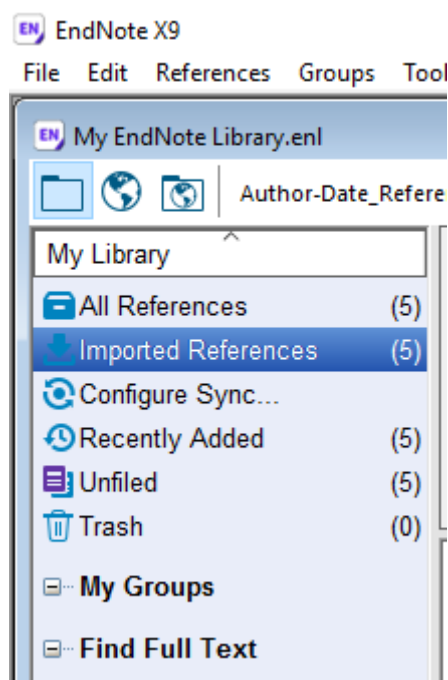


7. You will then be prompted to save your reference. Once you have clicked on **Yes**, you will be returned to your list of references in your EndNote library.



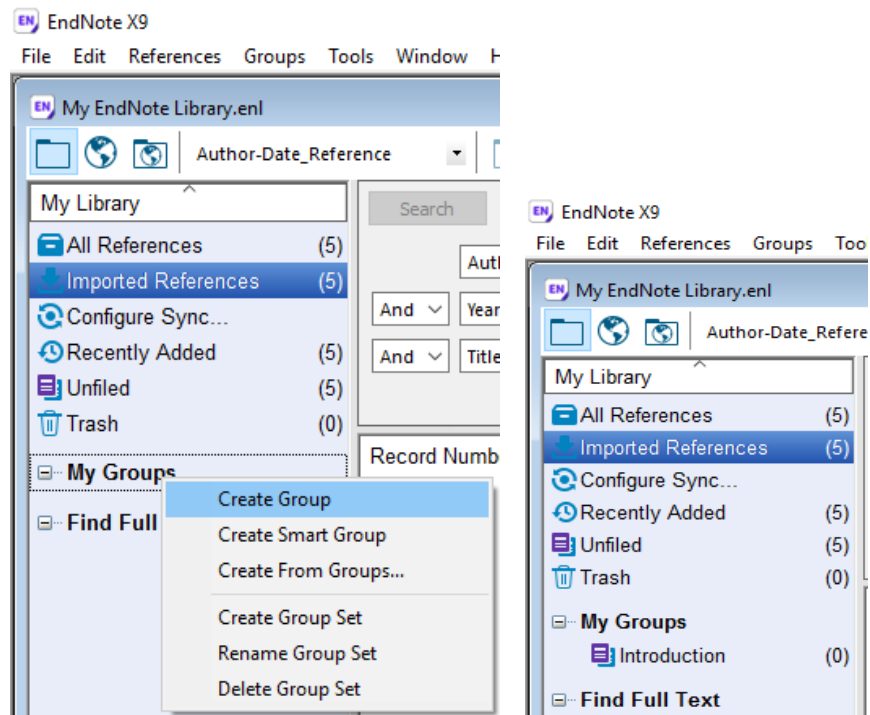
USING GROUPS:

- Groups may be used to create subsets of references in a library.
- The Groups Pane is on the left of the screen. Any groups you create will be listed under **My Groups**.



Creating A New Group:

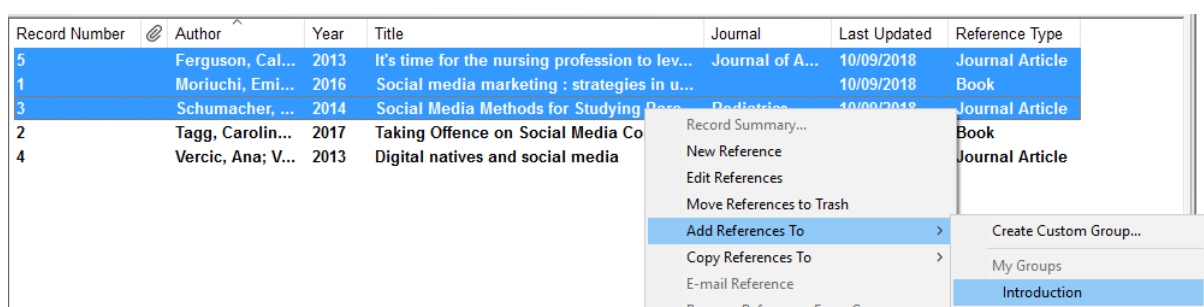
1. Right click on the name **My Groups** in the left pane. Click on **Create Group** from the menu that appears and you will be prompted to create a new group name. Once you have typed in your group name, press Enter.



You can also create a group by clicking on the **Groups** menu and selecting **Create Group**.

Adding References To A Group:

1. Make sure you are in the **All References** group. Highlight the reference(s) you want to add.
2. Right click on the highlighted reference(s) and a drop down menu will appear. (You only have to right click on one reference if you have several references highlighted).
3. Click on **Add References To**. Another drop down menu will appear with the names of the groups you have. Click on the group name to which you want the reference(s) added. The reference(s) will now appear in that group (they will remain in **All References**).



4. Alternatively, you can drag and drop references into a group.

MANAGING YOUR REFERENCES:

Editing a Reference:

1. Highlight the reference you want to edit. In the right hand pane, select the **Reference** tab and all the fields of the selected reference will be displayed.

Record Number	Author	Year	Title	Journal	Last Updated	Reference Type
5	Ferguson, Cal...	2013	It's time for the nursing profession to lev...	Journal of A...	10/09/2018	Journal Article
1	Moriuchi, Emi...	2016	Social media marketing : strategies in u...		10/09/2018	Book
3	Schumacher, ...	2014	Social Media Methods for Studying Rare...	Pediatrics	10/09/2018	Journal Article
2	Tagg, Carolin...	2017	Taking Offence on Social Media Convivi...		10/09/2018	Book
4	Vercic, Ana; V...	2013	Digital natives and social media	Public Relati...	10/09/2018	Journal Article

Reference Preview Social Media Methods for St
 Reference type: Journal Article
 Rating
 Author
 Schumacher, Kurt
 Stringer, Kathleen
 Donohue, Janet

2. Make the changes to the record in the right hand pane.
3. Click **File > Save** to save the changes **OR** click anywhere in the main list of references and you will be prompted to save the changes you have made.

Sorting Your Library:

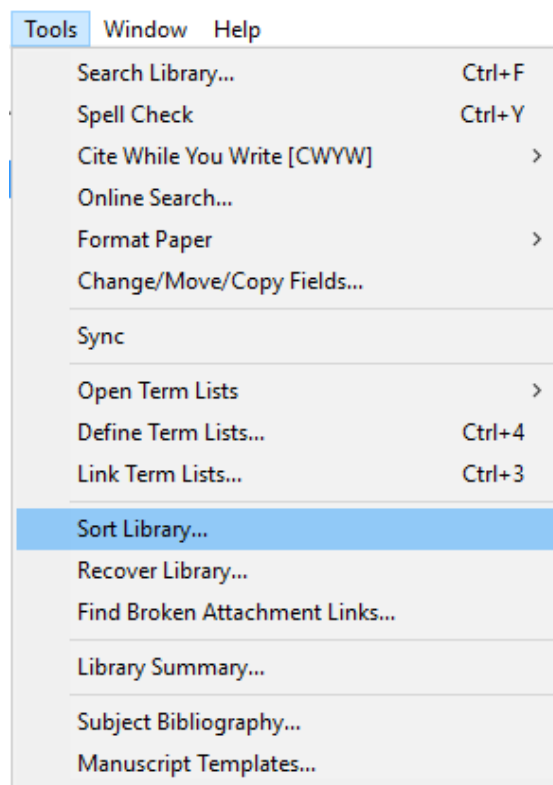
- The quickest way to sort a library is to click on the headings at the top of your EndNote library eg. **Author, Title, Year, Record number.**

Record Number	Author	Year	Title	Rating	Journal	Last Updated	Reference Type
2	Beck, Anne Mari...	2016	Multidisciplinary nutritional support for under...		Nutrition	27/02/2017	Journal Article

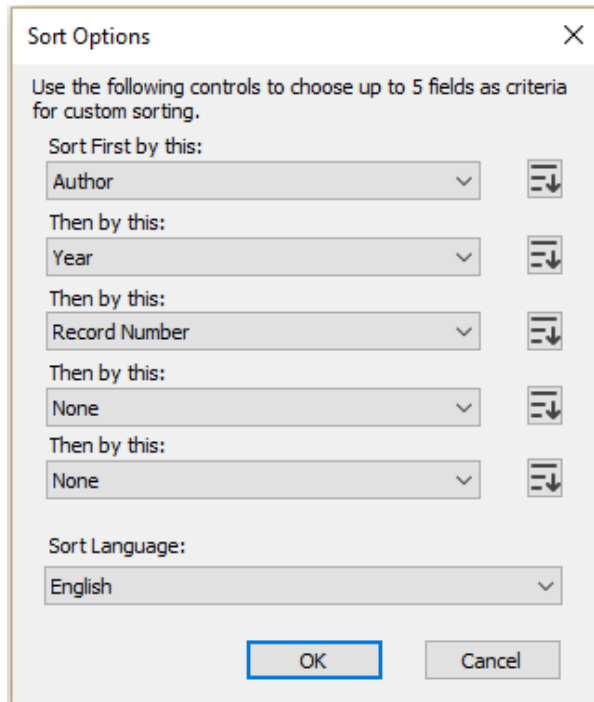
- Clicking on the **Author** heading will sort your library alphabetically from A-Z and if you click on it again, it will sort your library from Z-A.

Sorting On Multiple Fields:

1. Click on **Tools > Sort Library**



2. Choose how you wish to sort your library. Click on **OK**.



Sort Options

Use the following controls to choose up to 5 fields as criteria for custom sorting.

Sort First by this:
 Author

Then by this:
 Year

Then by this:
 Record Number

Then by this:
 None

Then by this:
 None

Sort Language:
 English

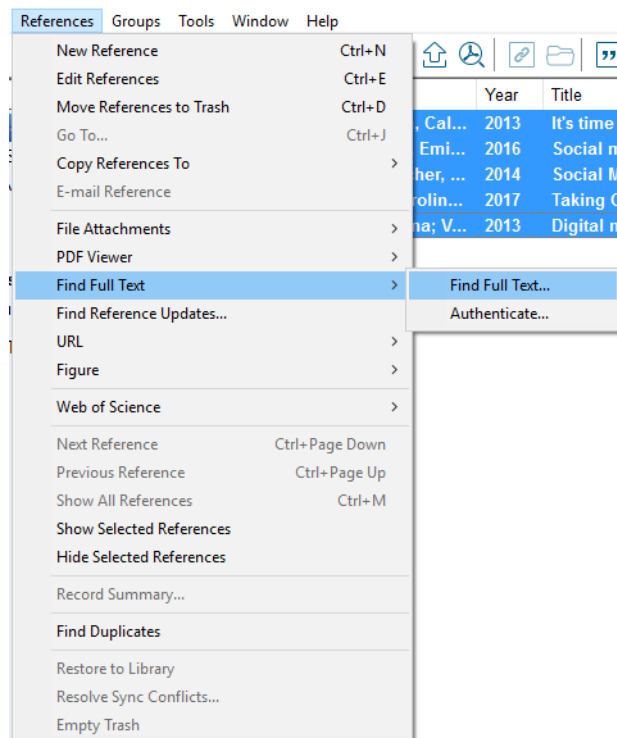
OK Cancel

USING “FIND FULL TEXT”:

This works best via a UQ computer or via VPN.

(Note: **Find Full Text** cannot be used in the Online Mode)

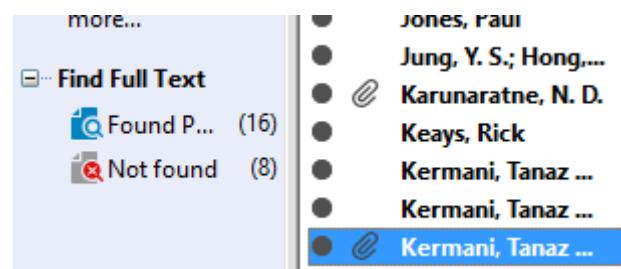
1. Click on the references you wish to find the full text article.
Tip: To select multiple references, click on the first one then, holding down the Control key, select your other references.
2. Click on **References > Find Full Text > Find Full Text** or click on the **Find Full Text** icon in the toolbar.
3. References appear in groups under a **Find Full Text** group set. EndNote will now attempt to find the full text of your selected references.



4. You will be asked to authenticate with your UQ username and password. You will see a message telling you that no menu access is available.
5. Click on **Continue** to begin the search. A copyright notice will appear.
6. Click on **OK**.

Viewing Full Text Results:

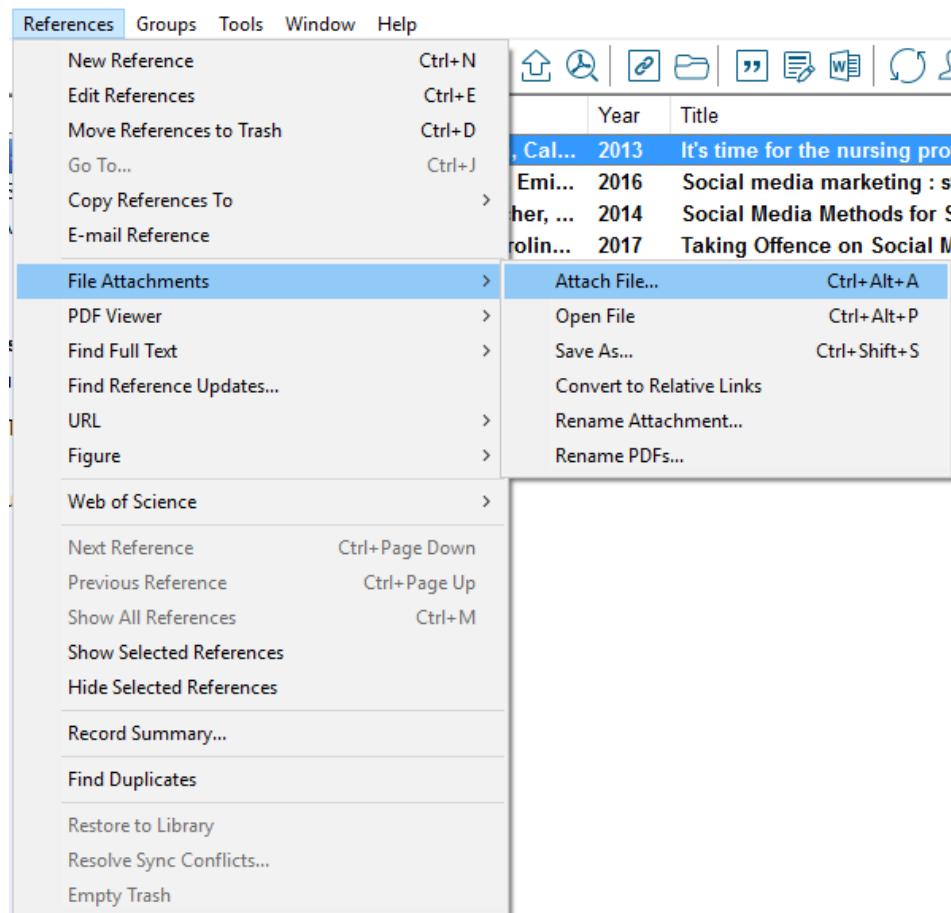
- Once EndNote has finished searching, the results will be displayed in the **Find Full Text** group.
- It will display how many were successful and how many weren't located. You can then view the references in each of these groups.



- For those that were successful, a paper clip icon will appear in the **File Attachments** column in the Library window.
- When you go into the reference, a **file attachment icon** will be displayed in the **File Attachment** field.

ADDING A FILE ATTACHMENT:

1. The **File Attachment** field allows you to store the path to PDF files on your hard drive.
2. Highlight a reference in your EndNote library. Click on **References > File Attachments > Attach File**.

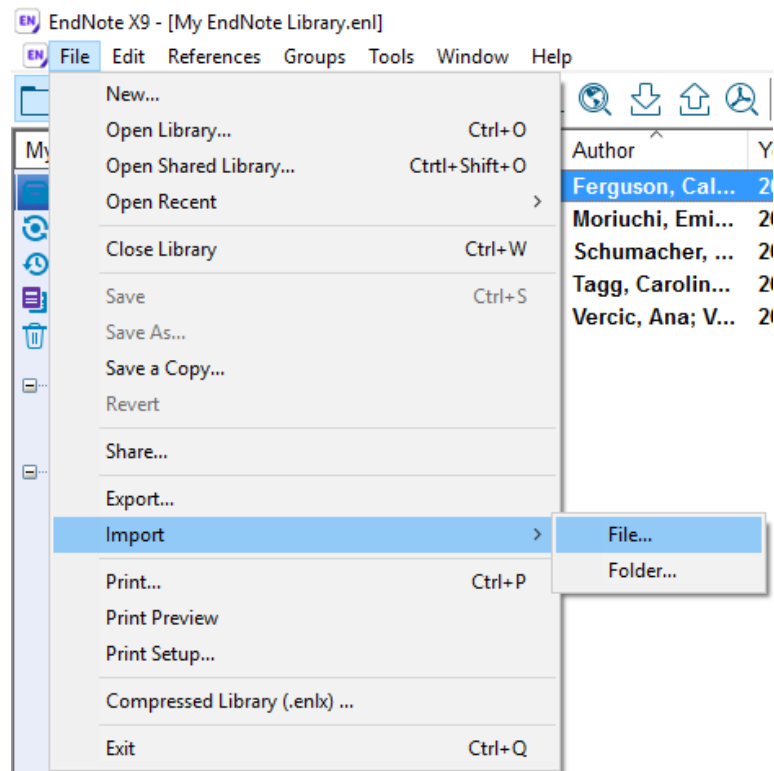


3. You will then be prompted to select a **PDF** file to attach to your reference. Once you have selected it, click on **Open**. The **PDF** will now appear in the right hand pane of your screen. If you click on the **Reference** tab in the right hand pane, you will see the **PDF icon** in the **File Attachments** field.

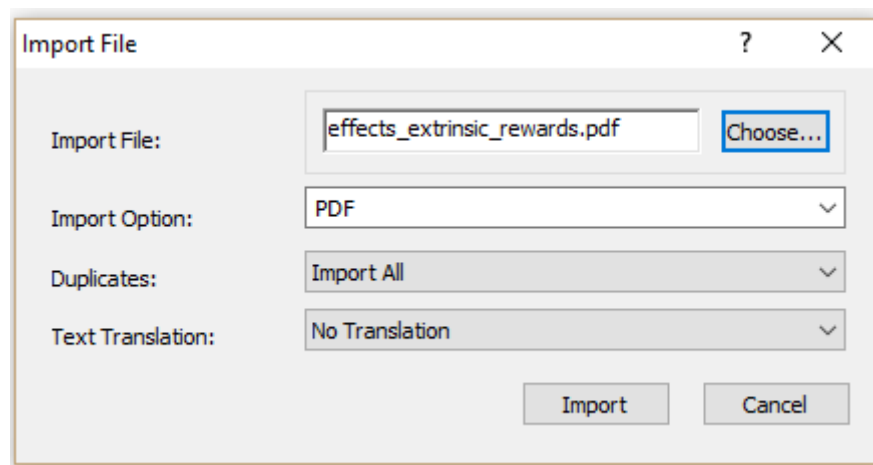
IMPORTING A PDF:

PLEASE NOTE THIS WILL NOT WORK WITH ALL PDFs.

1. If you have a PDF saved on your computer, you can import it into your EndNote library. It will place the relevant information in the correct fields and attach the PDF to the File Attachments field.
2. Click on **File > Import > File...**



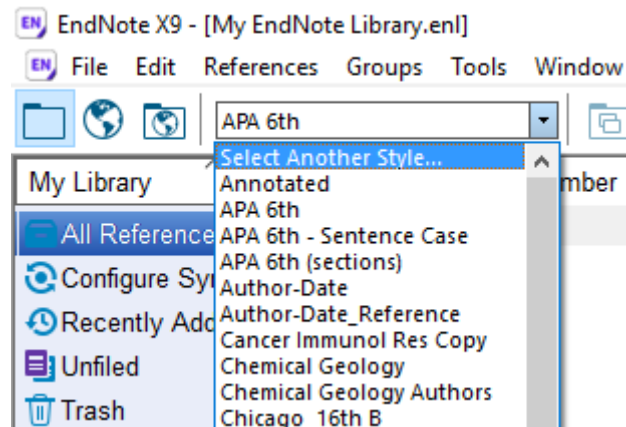
3. The **Import File** box will open.
4. Click on **Choose** to select the PDF file to import and then click on **Open**. The PDF file name will now appear in the Import File text box. In the **Import Option** text box, click on the down arrow and select PDF. The other text boxes can be left as they are. Click **Import** and the reference with PDF attached will be in your EndNote library.



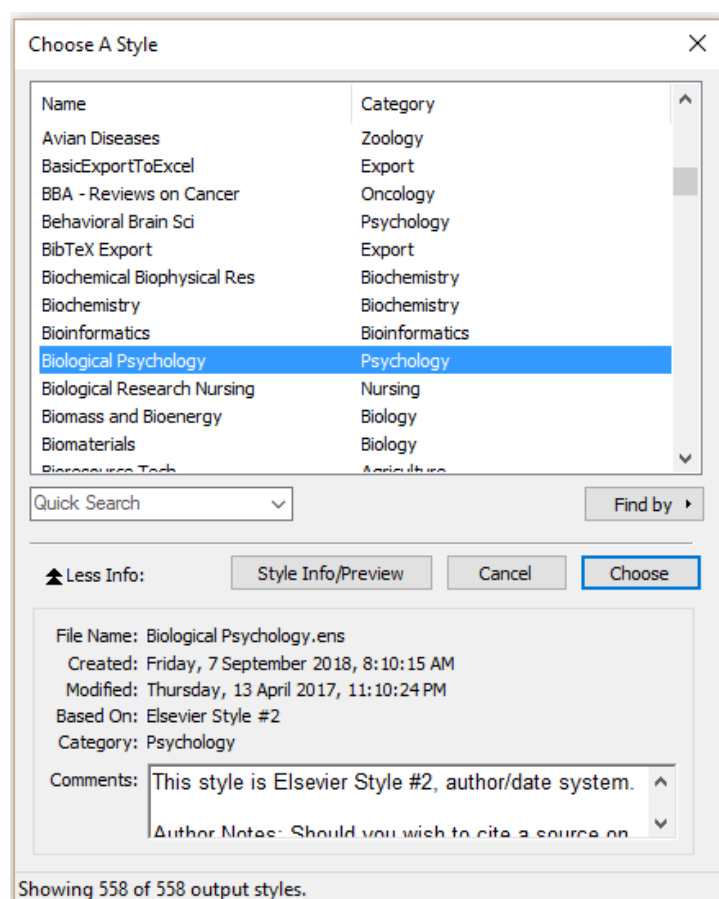
SELECTING THE OUTPUT (REFERENCING) STYLE:

In EndNote:

1. Click on the down arrow of the **Bibliographic Output Style** box located in the top left hand corner of the screen. Click on **Select Another Style**.



- The complete list of EndNote styles will appear.

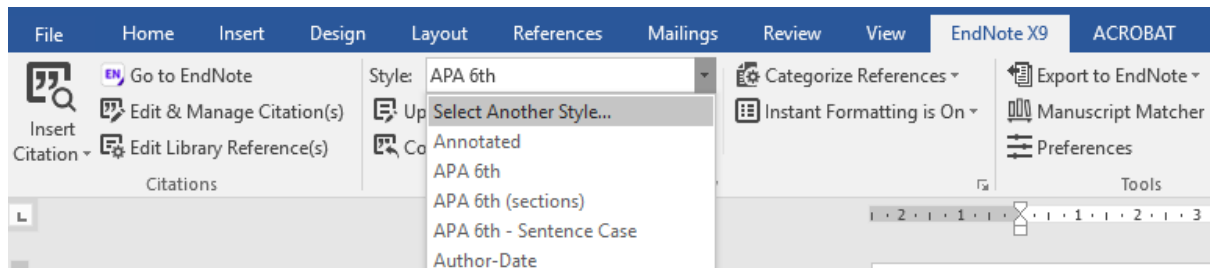


- Find the style you wish to use from the alphabetic list. Click on it and then click on **Choose**. This will now be the current style.

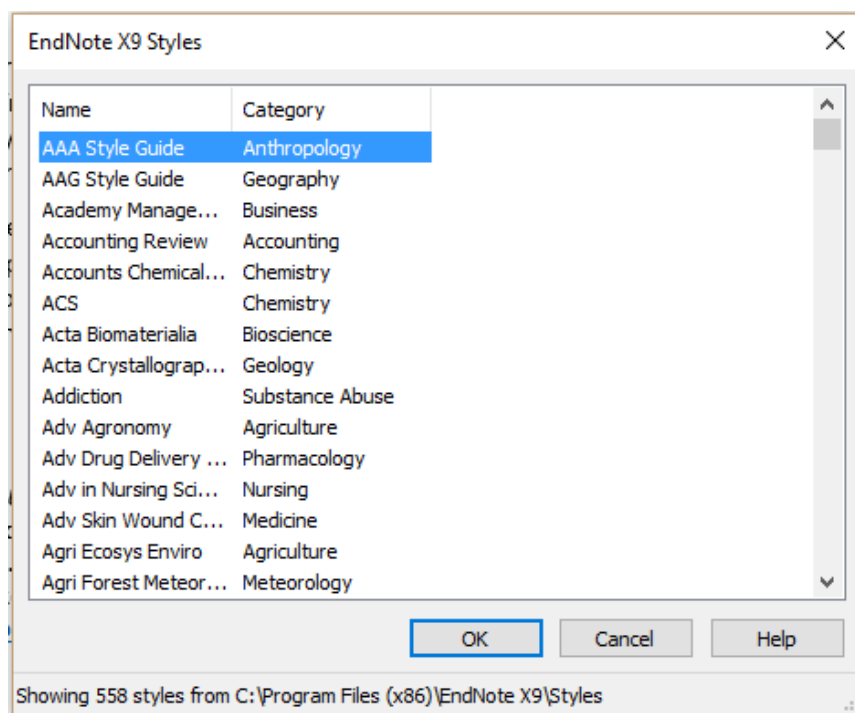
In Word:

- Always check the style in the Word EndNote X9 toolbar if you have changed it in EndNote. Sometimes the style will not have changed there.

2. Click on the **EndNote X9** option in the menu bar. Check which style is listed in the **Style** drop down menu. If the style listed is not the one you require, click on the drop down menu. A list of “favourites” will be listed. If your style is there, click on it.
3. If your style isn’t in the “favourites” list, click on **Select Another Style**.



4. The **EndNote X9 Styles** window will appear. Select your style from the alphabetic list and it will now be the current style.

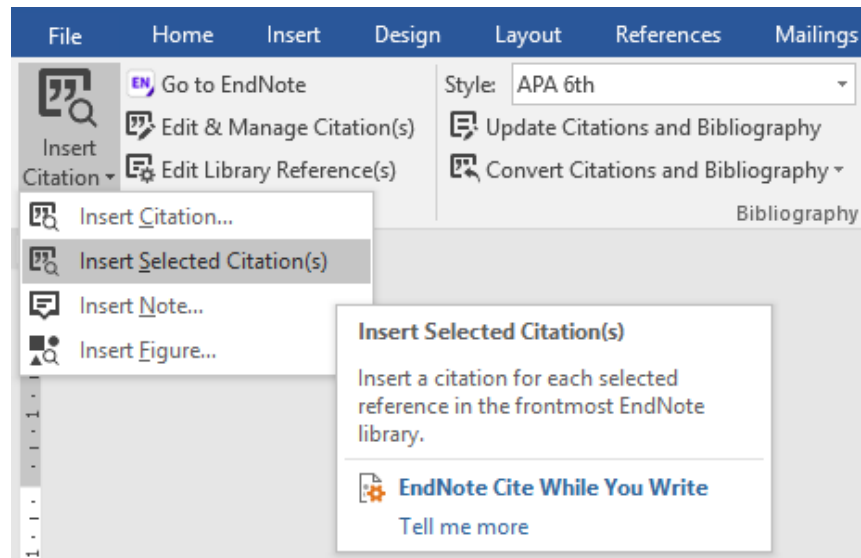


CREATING A REFERENCE LIST USING IN-TEXT CITATIONS:

“Insert Selected Citation” Option:

1. EndNote works with Word to create in-text citations and reference lists. Open both your EndNote library and Word document.
2. You can add in-text citations as you are writing or if you have a completed document.
3. In EndNote, highlight the reference you are using by clicking on it once. (You can use more than one reference in the same citation – just highlight all those you need by holding the Ctrl key down as you select them).
4. Switch back into **Word**. Go to the EndNote X9 toolbar.
5. Check that the correct **Referencing Style** is displayed in the **Style** box.

6. Put your cursor where you want the in-text citation to appear in your **Word** document. In the **EndNote X9** menu, click on the **Insert Citation** down arrow icon and then click on **Insert Selected Citation(s)**. The in-text citation will appear in your **Word** document and the reference will appear at the end of your **Word** document.



7. Repeat these steps for each of the references you want to include.
8. Each time you add a new reference, it will be added to the reference list at the end of your document. If you use a reference more than once, it will not duplicate it in the reference list. (This list can be moved to a new page and a heading can be added.)

Recent Developments in Personal Bibliographic Software: a Critical Review

By E.N. Fyve

Since the 1980s, there have been a variety of software products on the market which can be classified under the general heading of Personal Bibliographic Software (Brown & Hackett 1990). All of these products perform the same two basic functions (Dickey 2001). They allow the user to maintain a database of bibliographic references and they permit the generation of a bibliography containing some or all of those references.

Substantial developments have taken place in the functionality of personal bibliographic software (Gardner & Terpening 1997). Today it is not difficult to find a product that can automatically import references from a CD-ROM or web database and format both in-text citations and a list of references in a wide variety of styles.

in text citation

Brown, P. & Hackett, F. 1990, *Managing Meetings*, Harper Collins.

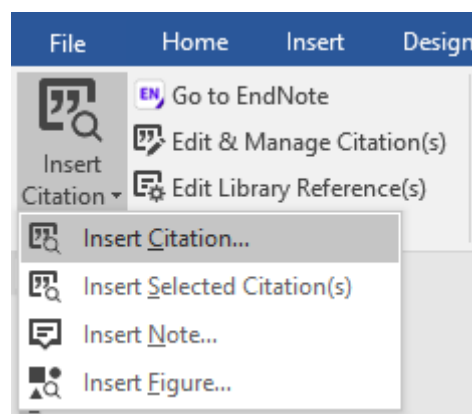
Dickey, F. 2001, *Last Minute Meetings*, Career Press, Franklin Lakes, NJ.

Gardner, L. & Terpening, S. 1997, *The Art of Event Design*, Mirimar Communications, California

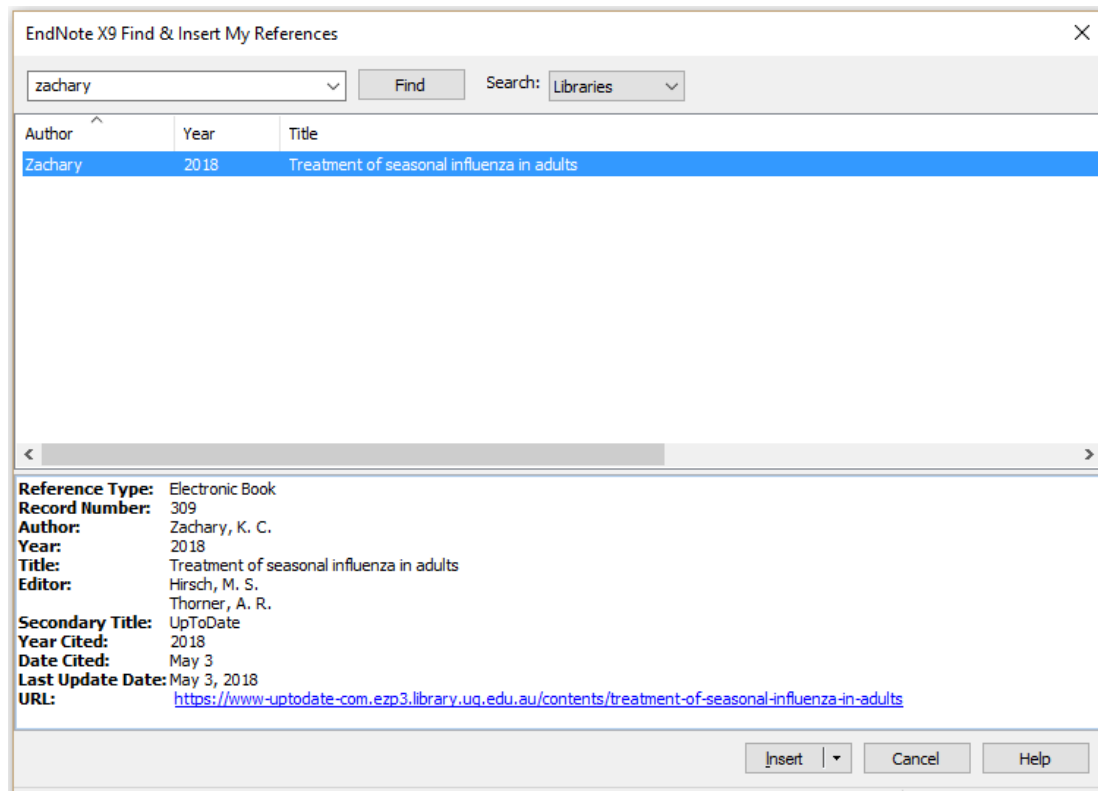
Reference list

“Insert Citation” Option:

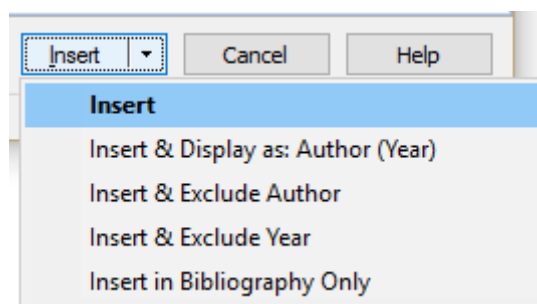
1. You can add in-text referencing and inserting references without leaving your **Word** document.
2. Place your cursor where you want the in-text citation to appear in your **Word** document. Make sure the referencing style you want is displayed in the **Style** box.
3. Click on the down arrow next to **Insert Citation**. From the drop down box, select **Insert Citation**.



- You will then get a search screen. Type in the last name of the author you want to insert. If more than one reference comes up for that author, just click on the author you want to highlight it.



- To insert the reference, just click on **Insert** (located on the bottom of the search screen). If you want to insert the reference with options such as excluding the author name, click on the down arrow beside insert and click on the option you want.



Insert A Reference From EndNote:

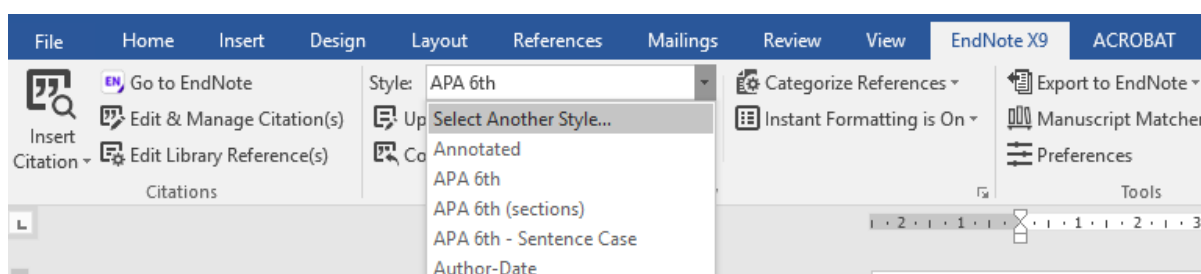
- In Word, place your cursor where you wish to add the reference.
- Go to EndNote. Highlight the reference(s) you want to use.
- Click on the **Insert Citation** button at the top of the EndNote window.



4. It will switch to Word and insert your selected references.
5. Repeat as needed.

CHANGING THE STYLE OF YOUR REFERENCE LIST:

1. You need to be in the **Word** document you want to change.
2. Click on the **EndNote X9** tab. Click on the down arrow in the **Style** box. Click on the style you want to change your bibliography to and it will automatically change in your Word document.

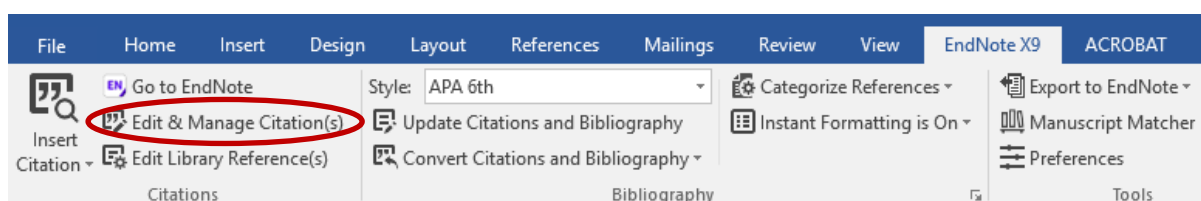


ADDING PAGE NUMBERS:

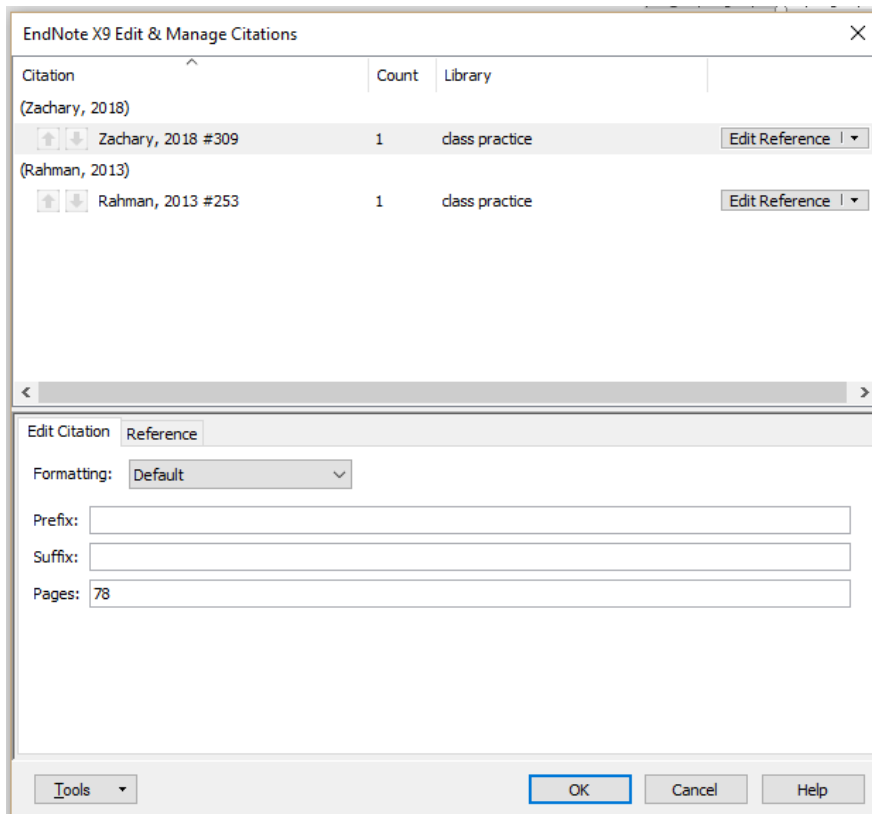
1. To add page numbers to an in-text citation, first click on the in-text citation once so a grey highlight appears.

that best fits your document (Cunningham et al., 2017).

2. Click on the **EndNote X9** tab in **Word** and then click on the **Edit & Manage Citation(s)** icon.



3. The **Edit & Manage Citations** box will appear. Make sure the citation you want to add page numbers to, is highlighted. In the **Pages** box, type in the page numbers. The **Suffix** box can also be used.



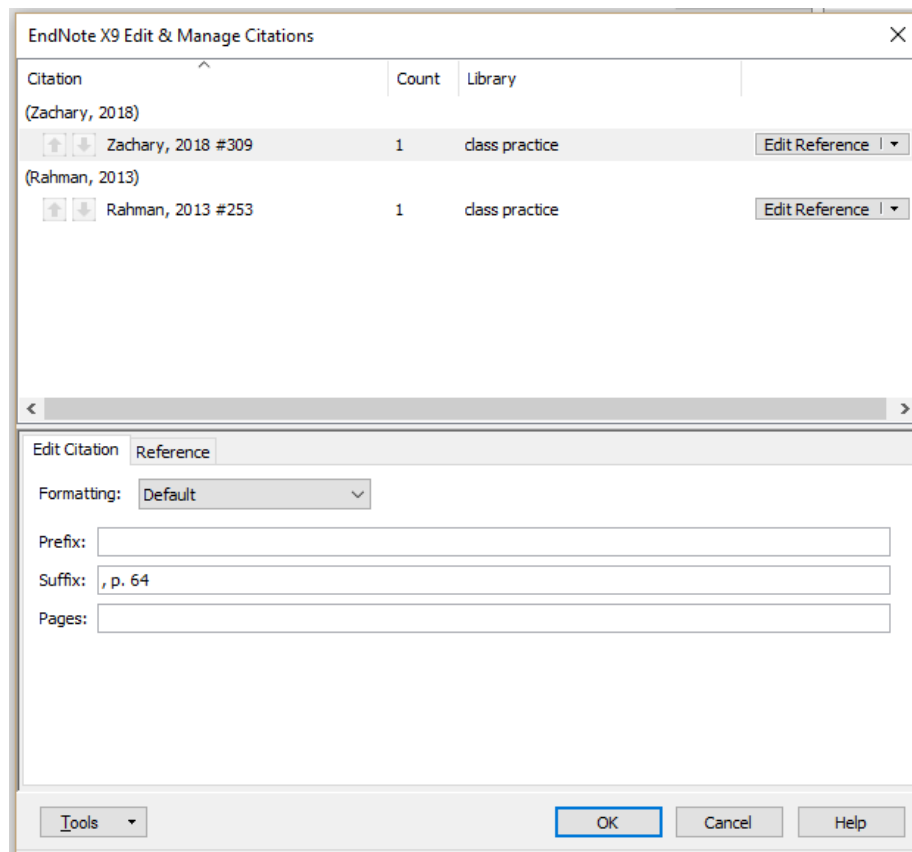
The screenshot shows the 'EndNote X9 Edit & Manage Citations' dialog box. It features a table with columns for Citation, Count, and Library. Below the table is a section for editing a citation, with tabs for 'Edit Citation' and 'Reference'. The 'Reference' tab is active, showing fields for Formatting (set to Default), Prefix, Suffix, and Pages (set to 78). At the bottom are buttons for Tools, OK, Cancel, and Help.

Citation	Count	Library
(Zachary, 2018)		
Zachary, 2018 #309	1	class practice
(Rahman, 2013)		
Rahman, 2013 #253	1	class practice

Edit Citation | Reference
 Formatting: Default
 Prefix:
 Suffix:
 Pages: 78

Tools | OK | Cancel | Help

4. The page number will now appear in the in-text citation - eg. **(Parmet, Lynm, & Glass, 2008, p.23)**. Repeat these steps for adding other page numbers.
5. Sometimes the page numbers will not appear when the **Pages** box is used. Use the **Suffix** box instead. You will have to enter the page numbers including the “p or pp”, spacing and any punctuation eg. **, p. 23**

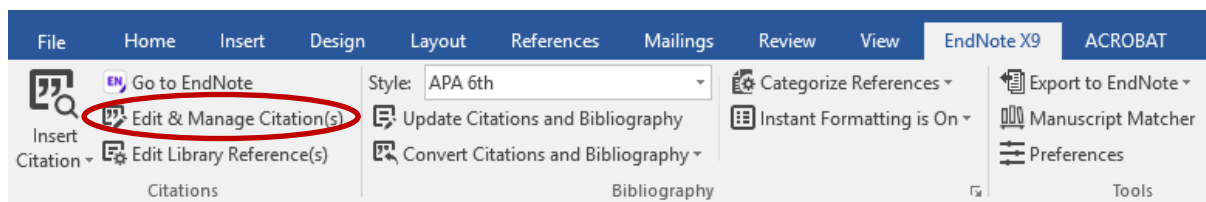


DELETING IN-TEXT CITATIONS:

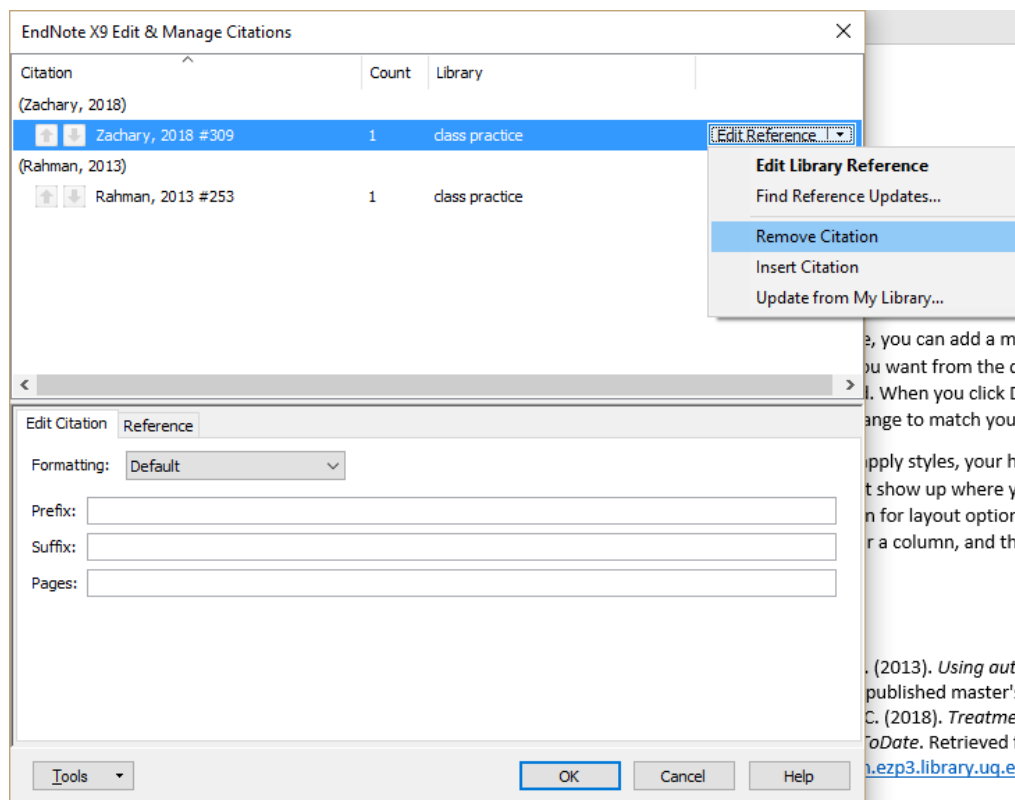
1. Highlight the in-text citation you want to delete.

that best fits your document (Cunningham et al., 2017).

2. Click on the **Edit & Manage Citation(s)** icon in the toolbar.



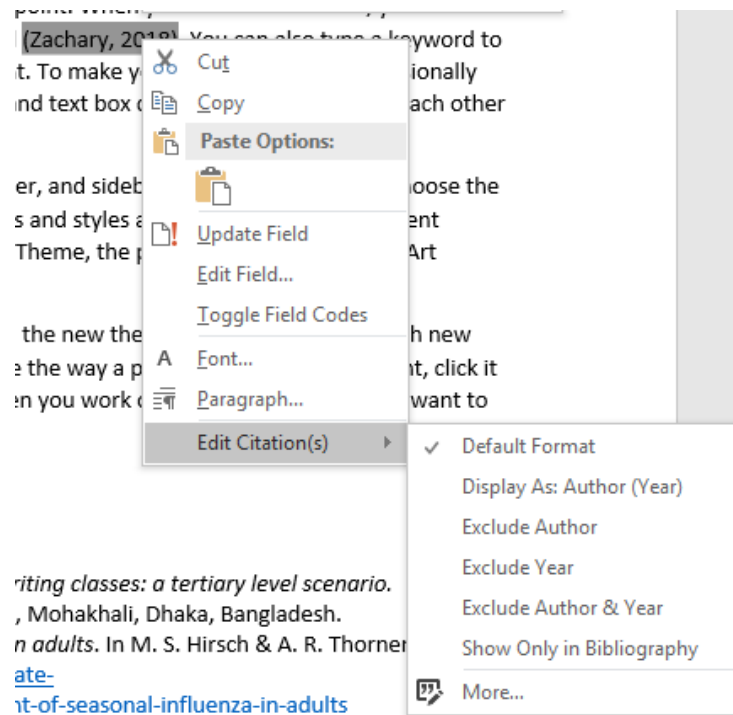
3. Make sure the citation you want to remove is highlighted in the top window. Click on the down arrow beside **Edit Reference**. Click on **Remove Citation** and then click on **OK**.



4. The in-text citation will now be removed.
5. If it is the only use of that reference as an in-text citation, it will be removed from the reference list. However, if it has been used elsewhere in the document, it will remain in the reference list.

REMOVING AUTHOR INFORMATION:

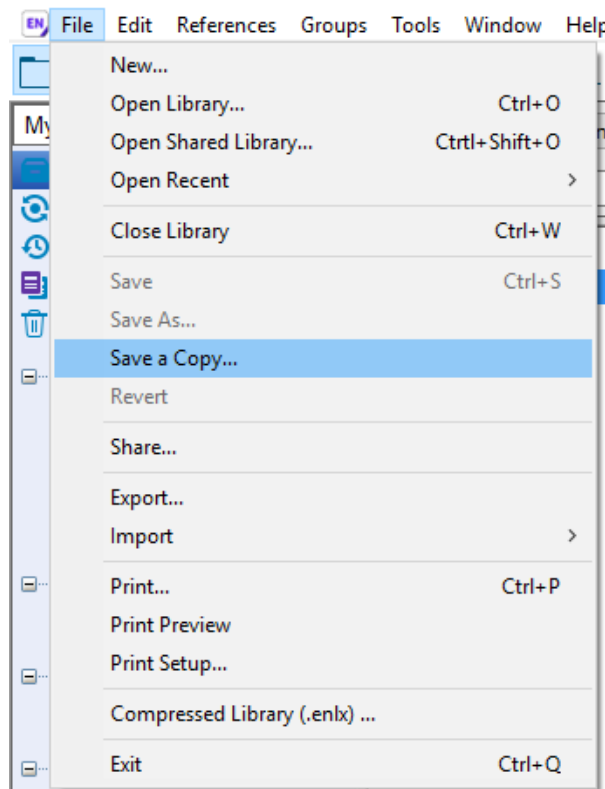
1. Occasionally, you may only want the year information to appear in an in-text citation eg: Cunningham et al. (2017) states.....
2. Right click on your citation (it will be highlighted in grey). Choose the **Edit Citation** in the drop down menu and click on **Exclude Author** on the next menu.



3. Only the year will now appear in the in-text citation eg. Cunningham et. al. (2017) argue that.....

SAVING A COPY OF YOUR LIBRARY

- **ALWAYS BACK UP YOUR LIBRARY REGULARLY**
 - When you save a new library, two files are created – a .enl and a .DATA. These two files need to stay together so all your library's information is available. The .DATA folder contains any file attachments eg. PDFs and group information.
 - **When moving your library, ensure that both files stay together in the same folder.**
1. Have your EndNote library open. Click on **File > Save A Copy**.



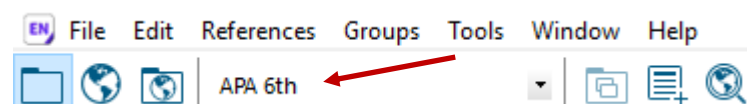
2. Give your copied library a name or accept the default. Choose where to save it.

NOTE: The **Save a Copy** command creates a **copy** of your library and keeps your original one. You can either give it a new name or accept the default, which is the name of your original library file with Copy at the end eg. My EndNote Library Copy.

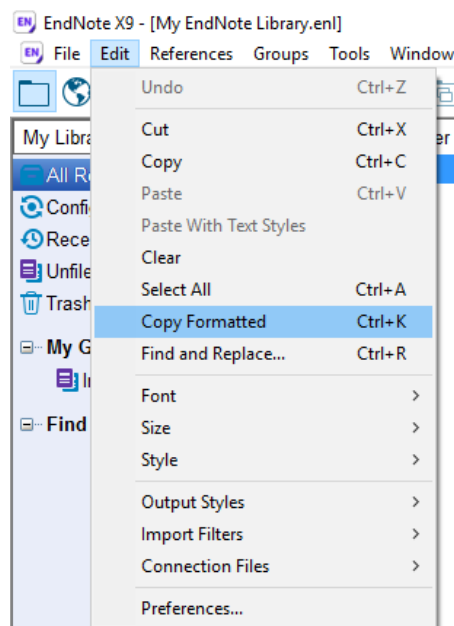
CREATING AN INDEPENDENT BIBLIOGRAPHY

(An independent bibliography does not rely on in-text citations)

1. In **EndNote**, make sure the bibliographic style you want appears in the **Bibliographic style** box.



2. Highlight all the references you want included in your bibliography. (**Ctrl** and **Click** on references to highlight them).
3. Click **Edit** from the EndNote menu and then click on **Copy Formatted**.

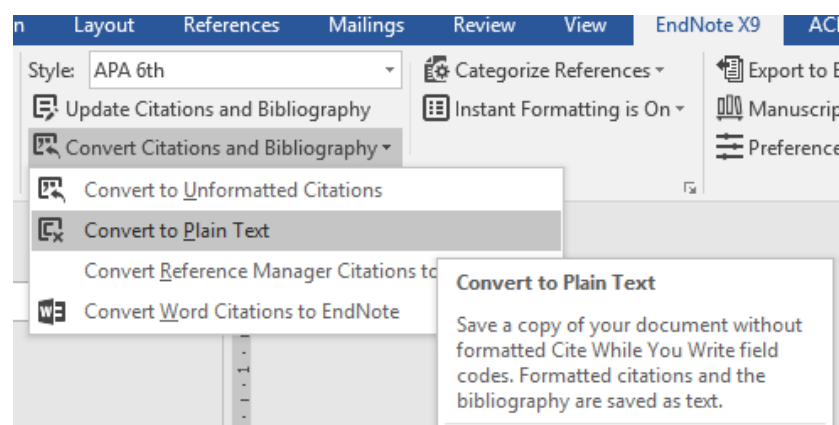


4. Open **Word**.
5. In Word - **right mouse click** and select **Paste**. The bibliography is created in the selected style you chose in **EndNote**.

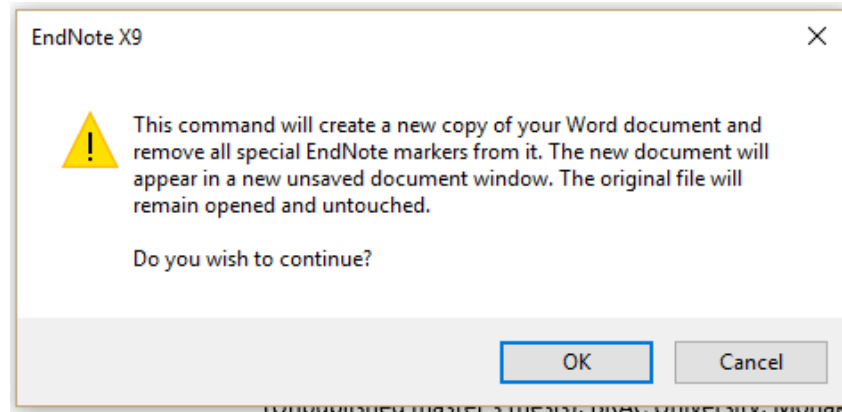
NOTE: Your style must be selected in the EndNote program. The style cannot be changed when you are in Word. If you want to change the bibliographic style, you have to delete the references in Word and go back into EndNote. Select a different style and follow steps 1-5.

CREATING PLAIN TEXT VERSION

- Before submitting an EndNote document, it is recommended that the EndNote field codes are removed.
 - This will create **two copies** of your document. One will have the EndNote field codes (makes your references appear in the correct format) and one will not (plain text).
 - You can submit the plain text version.
1. In your **Word** document, click **Convert Citations and Bibliography** and then select **Convert to Plain Text**.



2. You will be prompted with the option to create another copy of your document with the EndNote field codes removed. Click on **OK**. Save the new document created with a different name.



3. To check to make sure the document is not connected to EndNote, click on the reference list of your document. If it does not go grey then it is not connected to EndNote. This is the document you email. If the reference list is highlighted in grey, it is still connected to EndNote.