

EndNote X9 for Thesis and Publications Writing

Windows Version

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Windows Versions X9.3.3 and above

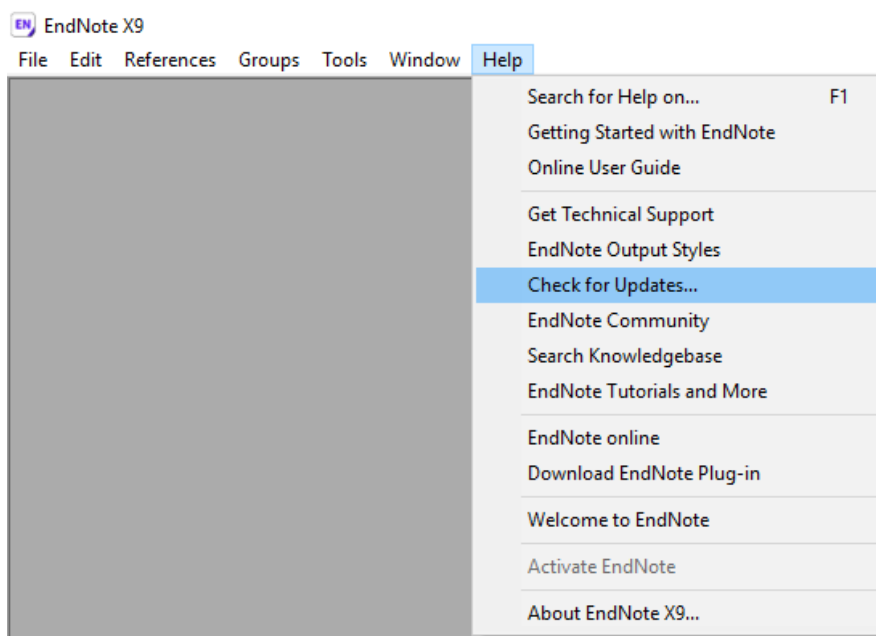
- From late 2019, Apple no longer supported 32 bit software. EndNote Mac changed to a 64 bit program. This means libraries created in Mac version X9.3.2 and above were not compatible with any Windows version earlier than X9.3.2 or with earlier Mac versions.
- Windows EndNote version X9.3.3 and above 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**.
- Libraries created in older versions will be converted when opened in the newest version. However, once converted, 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. Further information is available from <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/changes 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

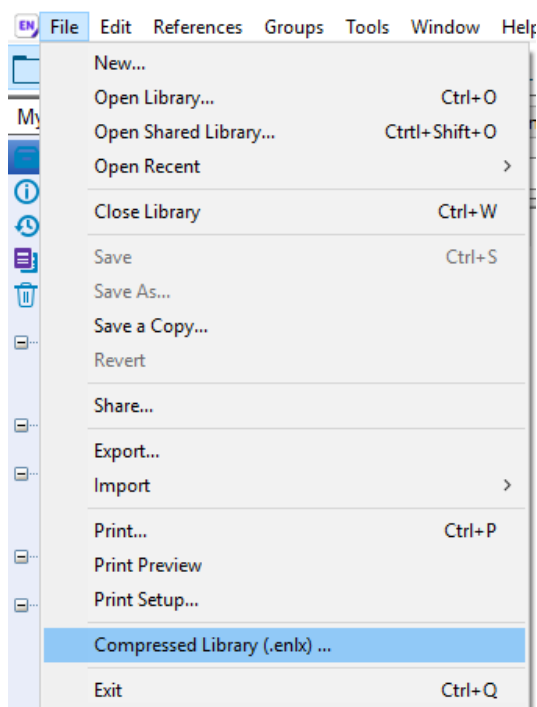
- Save 3 copies in 3 locations
- Do not use a backup as your working library unless it is needed.
- Using the **Compressed Library** option in EndNote is recommended for creating backups.

Creating A Compressed Library:

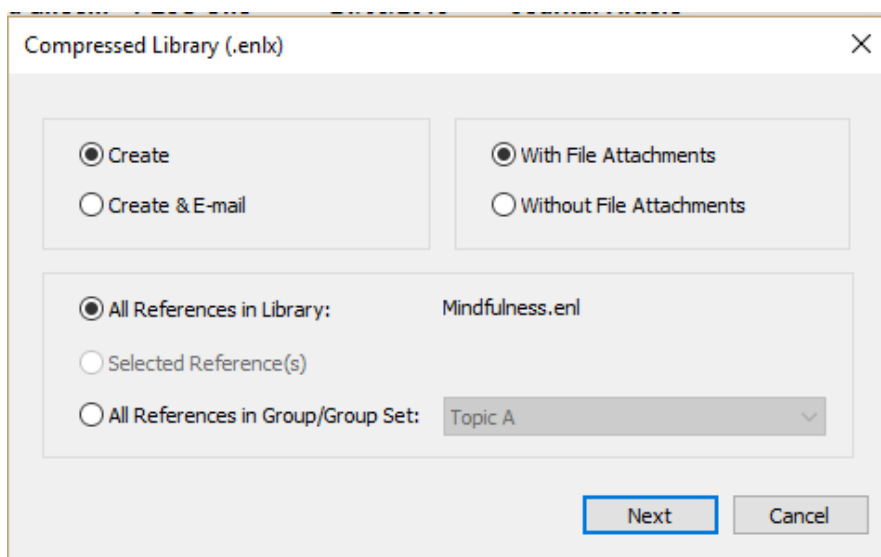
When an EndNote library is created, two files are produced. One has an .enl file extension eg. My Thesis Library.enl and the other is a folder with the same name but ending in .DATA eg. My Thesis Library.DATA. These files must remain together for your library to fully function.

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
- Frequency of back up if at the discretion of the user, but it is recommended at least once a week

File Naming for your EndNote library:

- 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.

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.

Setting Preferences in EndNote:

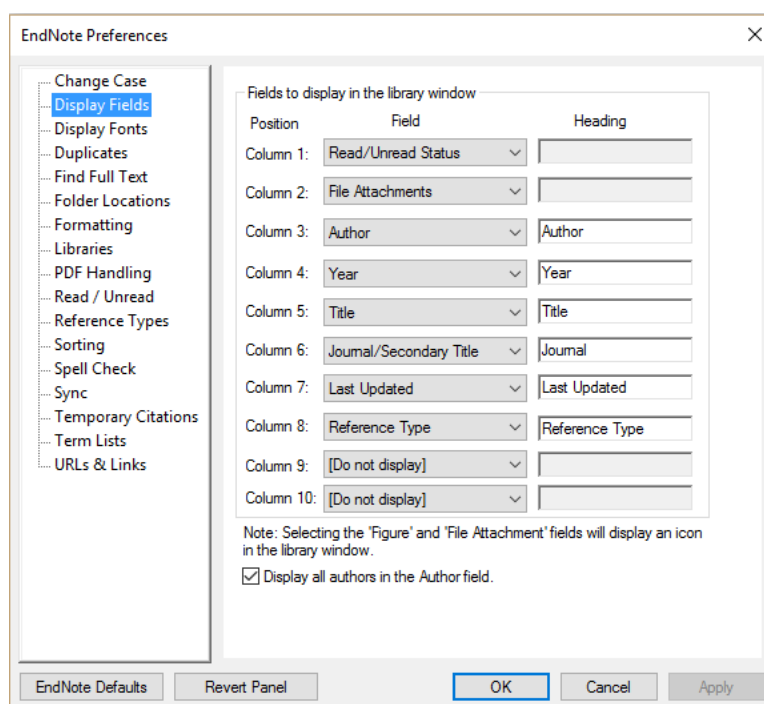
Changing Display Fields:

1. You can change which fields display in your library. For example, it is useful to know the unique record number of each reference.

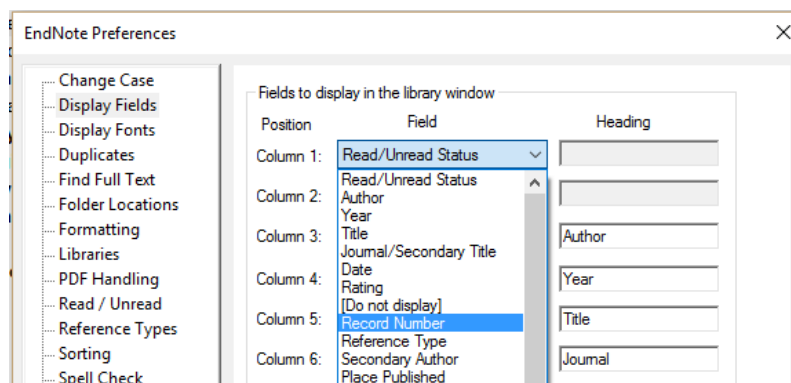


●	Author	Year	Title	Journal	Last Updated	Reference Type
●	Holzman, Jacob B.; Valentiner, Da...	2016	Self-focused attention affects subsequent processing of positive (bu...	Journal of B...	18/03/2016	Journal Article

2. Go to **Edit > Preferences > click on Display Fields.**



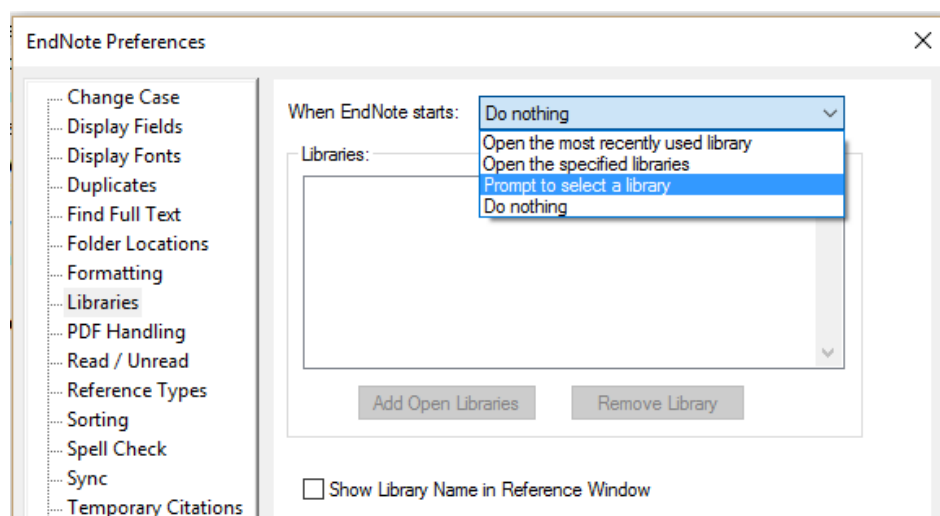
- Choose which field you want to display from the drop down menu of each column.



- Click on **Apply** then **OK**.

Changing How Libraries Open:

- By default, when you open EndNote, the last library you had open will be displayed.
- If you work with multiple libraries and don't wish to accidentally add imports to the wrong library, you can change this setting through the Preferences.
- Go to **Edit > Preferences > click on Libraries**.
- From the **When EndNote starts** drop down menu, select the **Prompt to select a library** option.



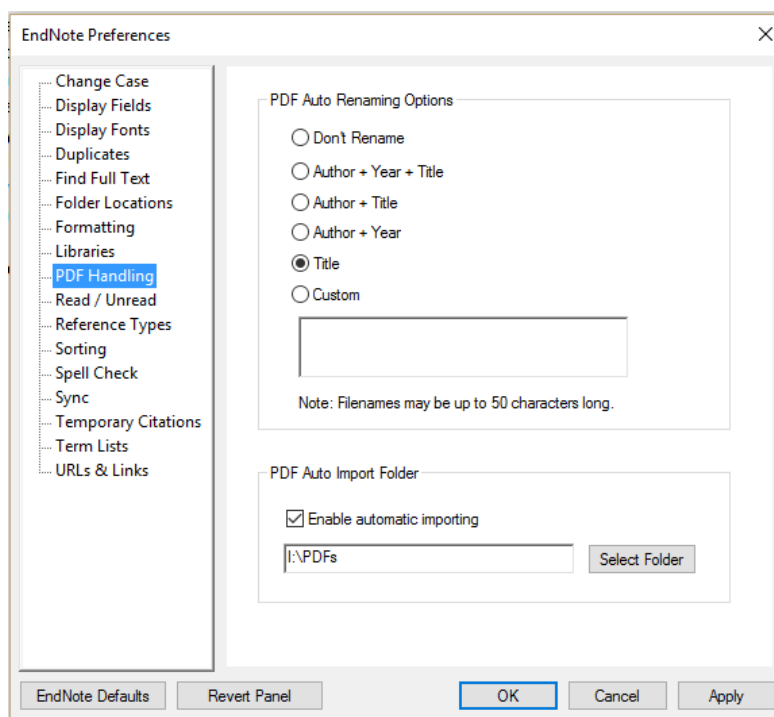
5. Click on **Apply** then **OK**.

Adding Automatic PDF Imports:

You can set EndNote to automatically import a PDF when added to a specific folder.

NOTE: Not all PDFs will import fully.

1. Go to **Edit > Preferences**.
2. In the **Preferences** window, click on **PDF Handling**.
3. In the **PDF Auto Import Folder**, section, check the **Enable automatic importing** box.



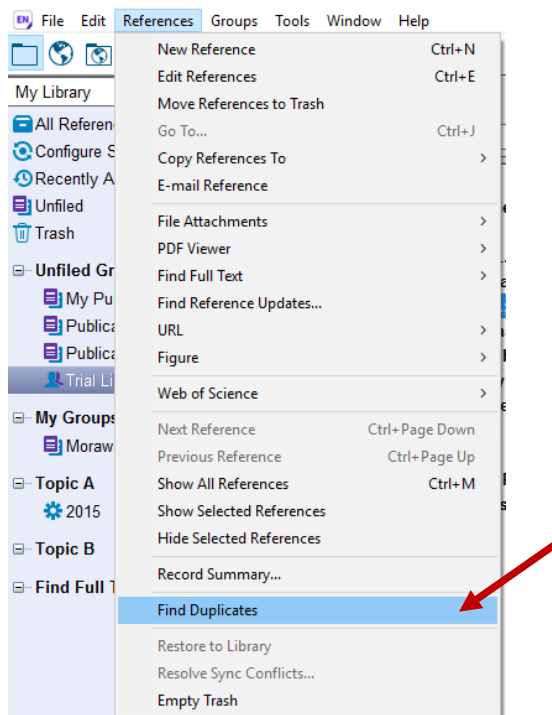
4. You will be asked to select which folder you wish to use. Choose your folder.
5. Click on **OK**.
6. Note: It will automatically import a PDF into the currently open library. If EndNote is not open, it will import the PDF the next time EndNote is opened (either into most recently opened library or EndNote will ask which one, depending on settings).

Cleaning Up Your EndNote Library

Remove Duplicates:

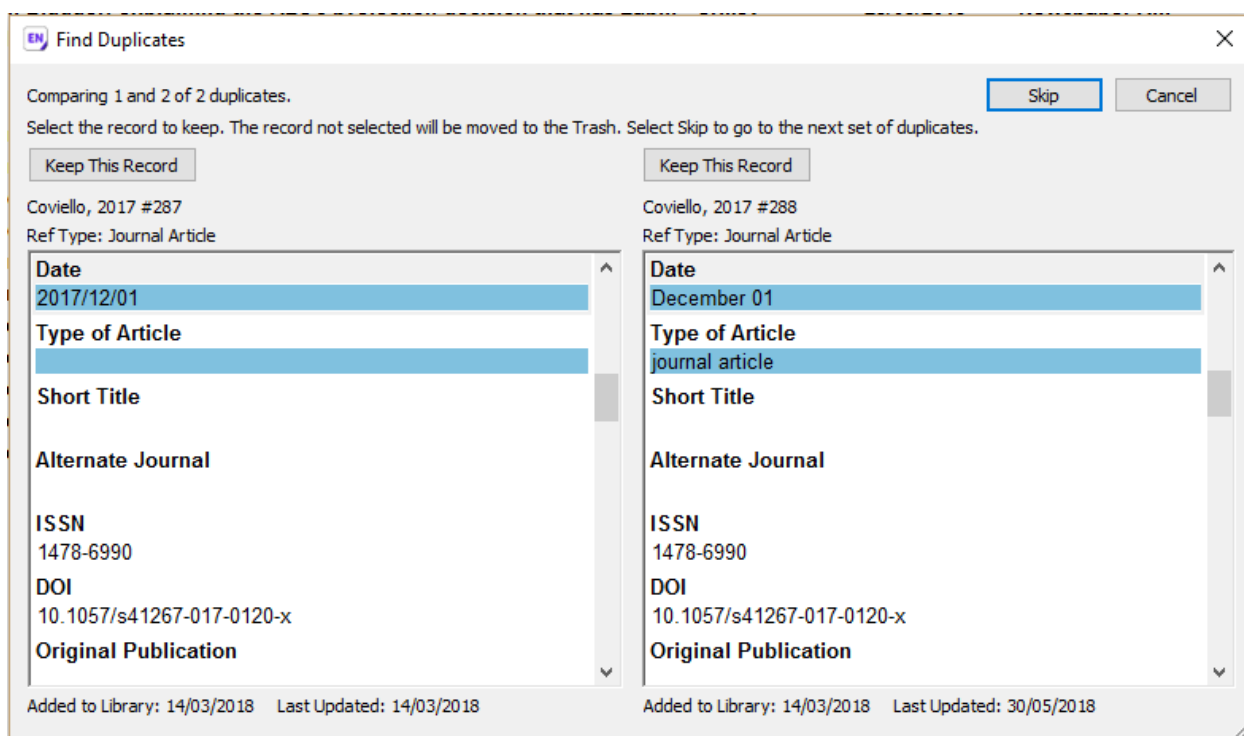
Note: We strongly recommend doing this before using EndNote with Word

1. Highlight the first reference, and press [Ctrl]+A on the keyboard to highlight all the terms.
2. Go to **References** in the top grey menu bar and choose **Find Duplicates** from the dropdown menu.



Removing One By One:

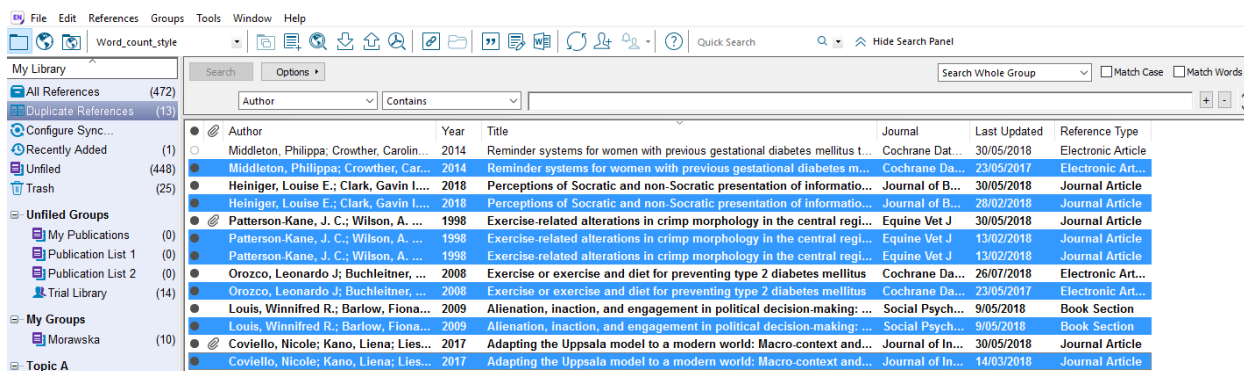
1. If you have duplicates in your library, EndNote will ask you which one you wish to keep. It will highlight where there are differences.



- Carefully check each record and choose the one you want to keep by clicking **Keep This Record**. You can also click on **Skip** to move on to the next one without removing either record.

Bulk Removal:

- If you have a lot of duplicates (which sometimes happens, especially when doing a systematic review), choose the **Cancel** option.
- EndNote will then highlight **ALL** your duplicates and you will be able to drag and drop them into trash.



Always check that all duplicates have definitely been removed by sorting your EndNote library by title (click on **Title** in the grey menu bar and references will be sorted by article title)

Author	Year	Title	Journal	Last Updated	Reference Type
Lewis, C. E.	2011	Denying the Safety of Anacetrapib, a CETP Inhibitor, in Patients at ...	Curr Cardio...	18/03/2016	Journal Article

Tidying Your References:

Corporate Author:

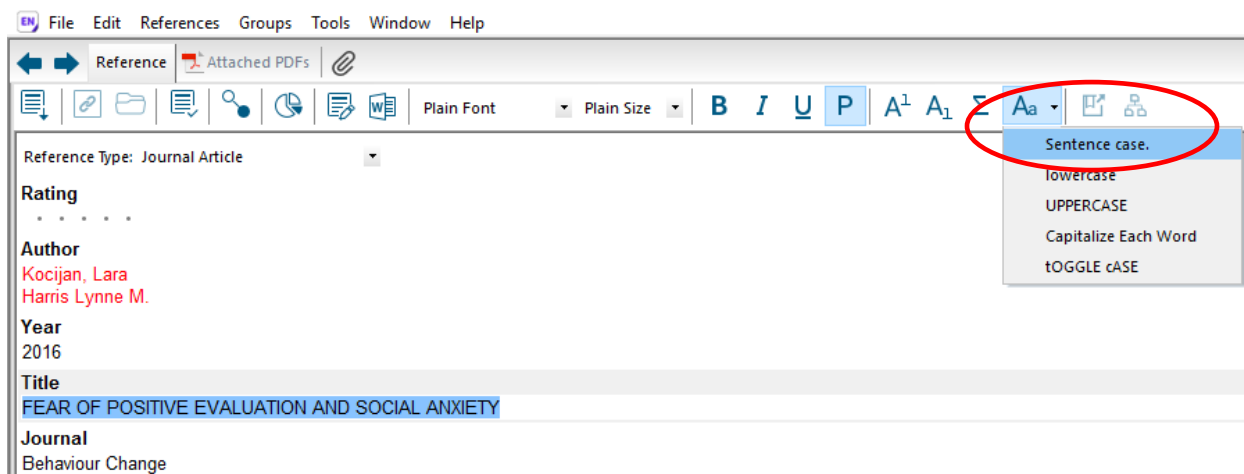
- Make sure corporate authors eg. government department, organisation names are followed by a comma ie. World Health Organisation, otherwise they will display like this: Organisation, W.H.

Capitalisation:

- Ensure article titles are **NOT** in capital letters in your EndNote library.
- Only the first letter of the first word of the title is in capital letters or the first letter of any proper noun)

To correct article titles displaying in capital letters:

- Double-click on the reference in EndNote.
- Highlight the article title and click on **Change Case** icon.
- Choose the **Sentence Case** option.
- Close your reference.



Entering Author (editor etc) Names:

- If you have manually added references to EndNote, ensure each author name is on a separate line.

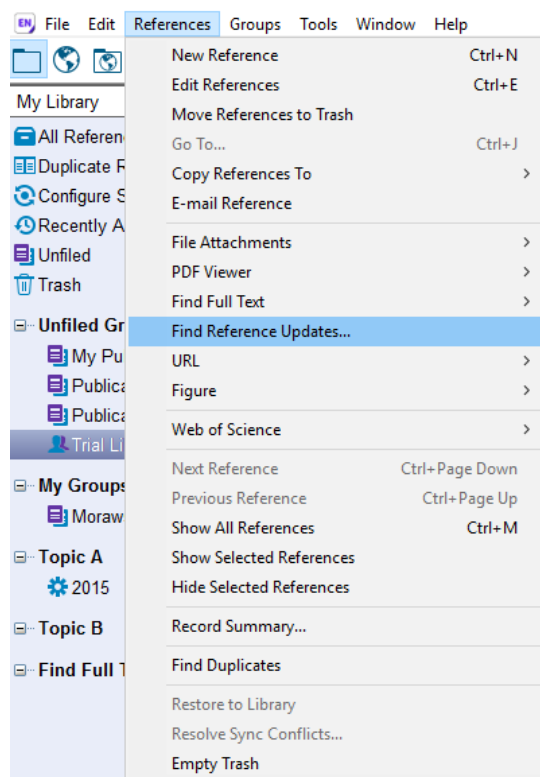
Updating References:

- Sometimes when references are exported from a database, they may not contain all the details eg. very new, published online first.
- EndNote can check if there have been any updates for a reference.

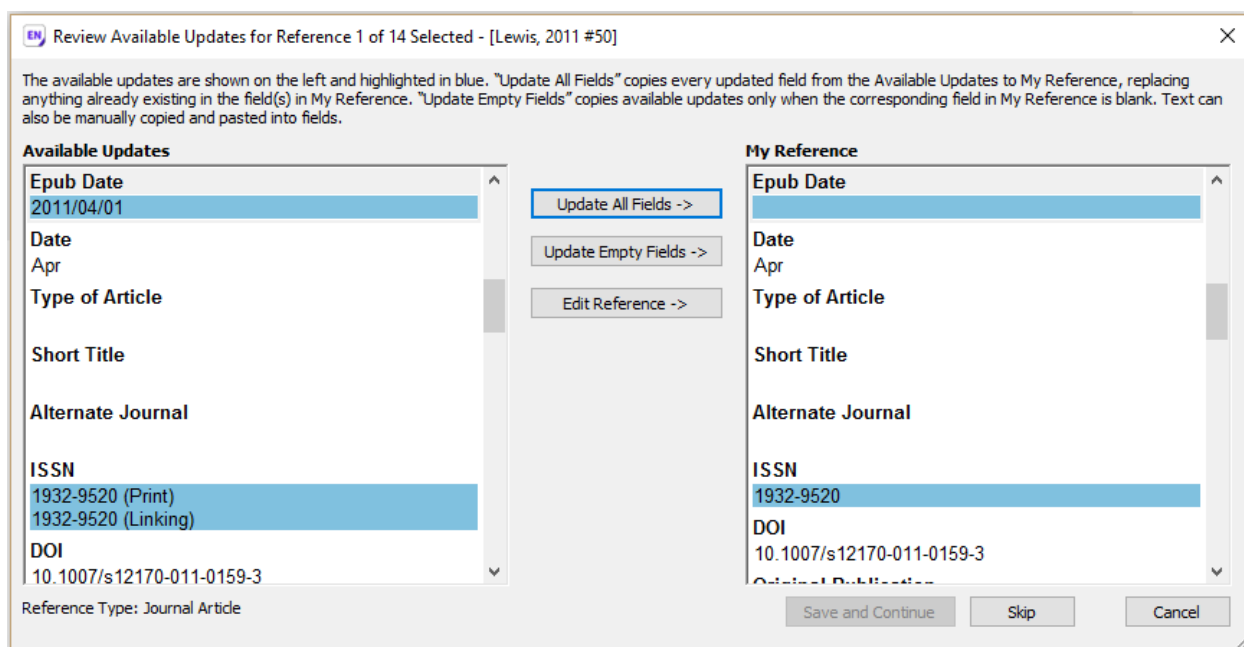
- This can also be used to add reference information for incomplete PDF imports. Just copy either the article title or DOI into the references and **Save**.

How to check for updates:

1. Highlight the references you wish to check.
2. Click on **References > Find Reference Updates** or right click and choose **Find Reference Updates**.



3. If EndNote finds any updates, a window will appear, listing the reference and any updates.



4. You can then choose to update all fields, update empty fields or edit the reference. You can also skip references if you don't wish to make any changes.
5. Make the changes as required.

Using Sync:

- EndNote's Sync function uses EndNote Online, a cloud based version.
- You need to first create an account with EndNote Online before you can use **Sync**.
- Syncing can be used for backup, for collaboration or for accessing your library from two different computers.
- **Sync works with only one library and only one EndNote online account.**
- Your sync library can be shared with up to 100 other EndNote users on version X7.2 or later
- Before syncing for the first time, create a backup using the **Compressed Library** option in EndNote.

Creating An EndNote Online Account:

Access to EndNote Online is free as part of UQ's subscription to EndNote.

Using a UQ Computer:

1. Go to EndNote online at <http://www.myendnoteweb.com/>
2. Register using your UQ email address and choose a password.

Using Your Personal Device:

1. Go to the Web of Science database via the UQ Library website and access it using your UQ username and password.
2. In Web of Science, click on **Sign in** and select **Register**.



- Once you have registered, you will be able to access EndNote online using that account.

Using EndNote on Two Different Computers:

- You can use this between Windows & Mac platforms.
- On your first machine, open the EndNote library you wish to use and sync it with EndNote Online.
- Note the name of the library – they need to be exactly the same on the two computers.
- On your second computer, open EndNote and create a new library with exactly the same name as the library on your first computer.
- Sync the library on your second computer with EndNote Online by clicking on the **Sync** button.



- A window will appear asking you to enter EndNote Online credentials. Click on **OK**.
- The synced library's references and groups will now be added to the library on your second library.
- The computers will now sync to EndNote Online every 15 minutes and when you close it automatically. (This can be changed in **Preferences > Sync**).

<https://www.youtube.com/watch?v=7Qv8O0E5cR0>

How To Share An EndNote Library:

- With EndNote X8 and X9, you can share library with up to 100 other users (EndNote X7 – 14 users). It also has an **Activity Feed** that enables users with access to library to see what others are doing in the library.
- There is no limit to the size of the library or cloud storage.
- All users must have EndNote Online accounts.

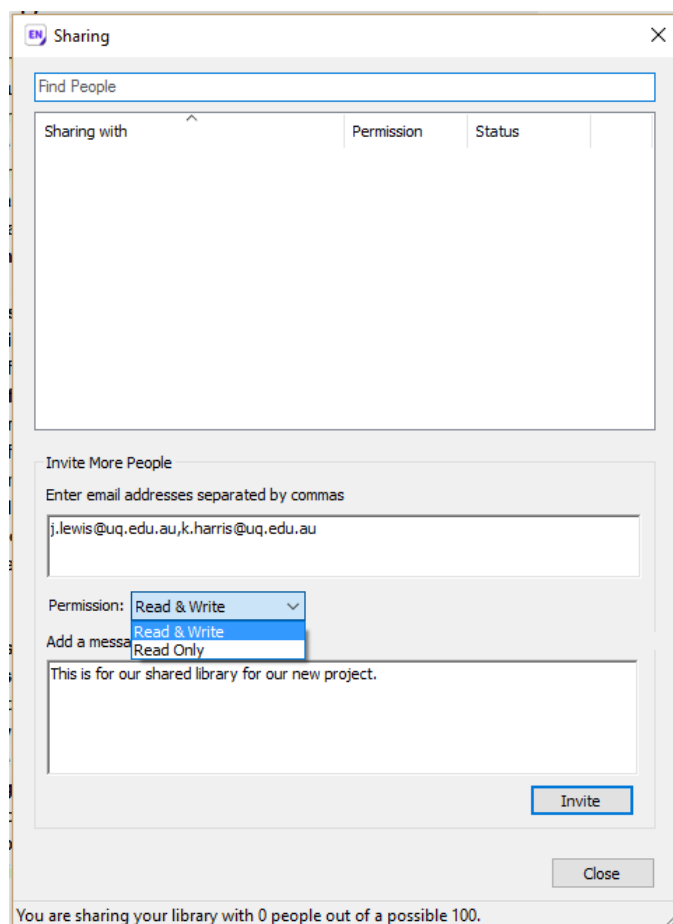
Sharing A Library:

- Sync the library you wish to share with your EndNote Online account. The library must be fully synced before you start sharing it.
- Invite members of your group using the **Share Library** button in EndNote.



- If you aren't already signed in to EndNote Online, you will be asked to log in.

4. Enter the email addresses of those you wish to invite. You can invite people at any time. This window also allows you to remind people who haven't accepted an invitation or remove people from sharing the library.
5. Set the type of access people will have to the shared library. You can select **read-write** or **read-only**.



6. People who are invited receive an email with a link to accept the invitation. The link will take them to a page where they can sign in with their EndNote Online credentials or sign up for an account.
7. A message will appear confirming that the shared library is then available.
8. The group members can then access the shared library by going to EndNote and to **File > Open Shared Library**. A list of the libraries that been shared with that group member will appear.
9. Select the library to be used and a local copy will be opened.
10. All (EndNote X8 and above) users will be able to view the activity feed for the shared library. It shows the last 500 activities in reverse, chronological order.
11. Any activity that appears in bold indicates that more information is available by clicking on it.
12. What users are able to do will depend on the permissions you set in the share invitation. Users with read-write access can add, change or delete references, attachments, PDF annotations and

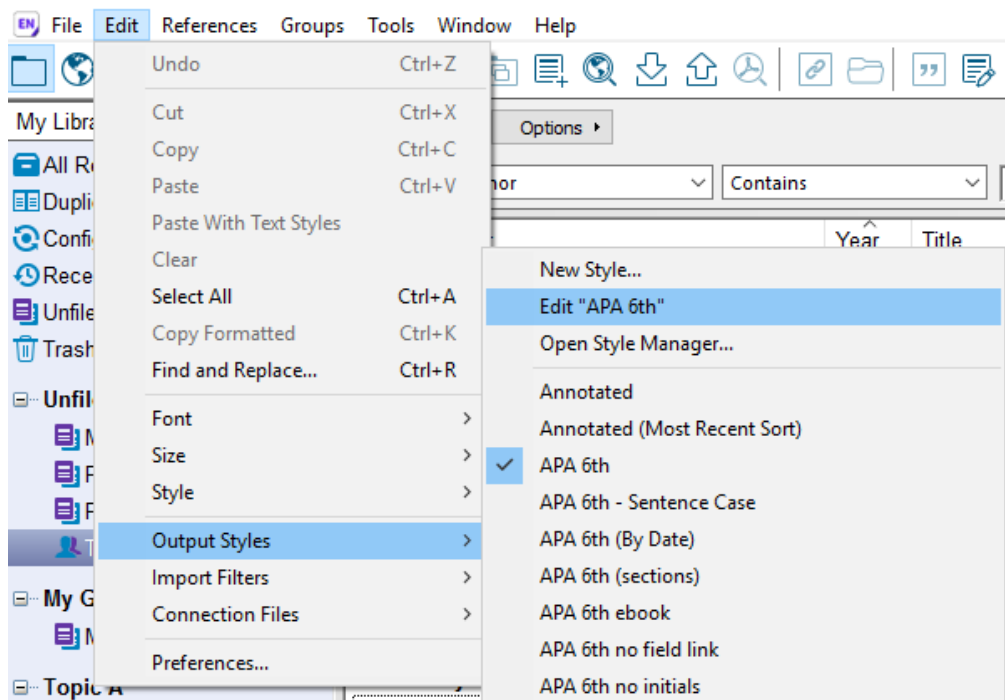
groups. Read-only access users will only be able to view the shared library. Changes will be synced for all group members to view.

Editing Output Styles

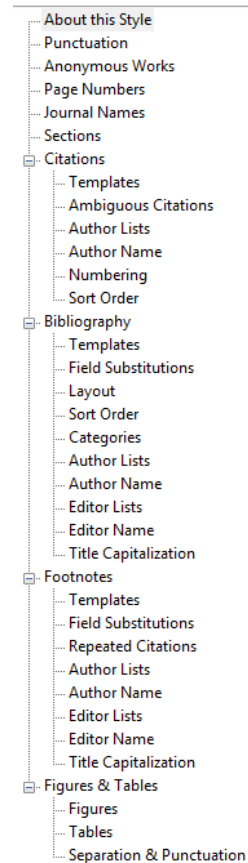
Many journals have a specific referencing style. Numerous journal styles are available for EndNote. Additional styles can be downloaded from <https://endnote.com/downloads/styles/>

ALWAYS rename your style before editing.

1. Go to **Edit > Output Styles**.
2. Select style you wish to edit. If it isn't in the current list, choose the **Open Style Manager** option and select the relevant style.
3. Go to **Edit > Output Styles** once more and select **Edit > [style name]**
4. The style will now be opened.
5. Go to **File > Save As** and save the selected style with a new name.

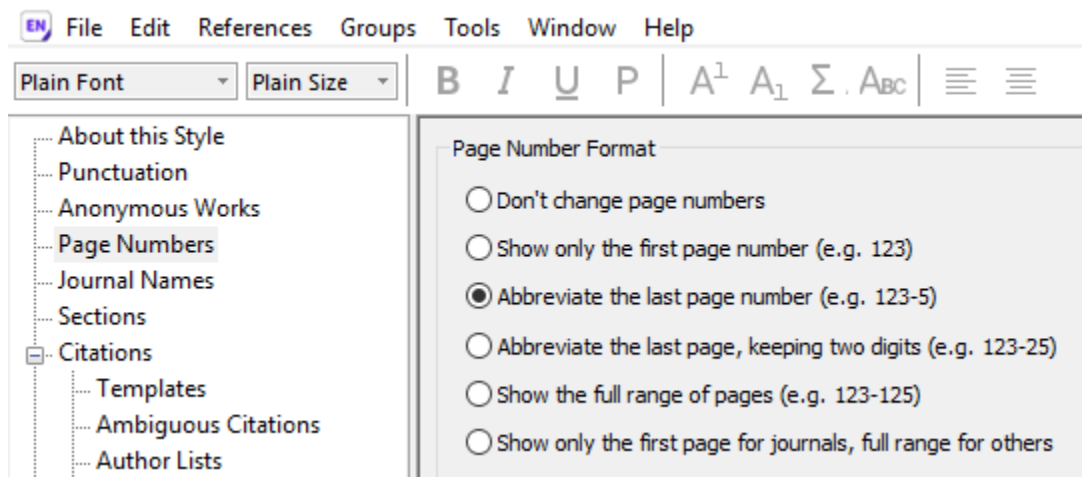


There are different options in the column of the left where you can make changes to a style. You can edit the style globally, the citations, the bibliography (reference list) or the footnotes.



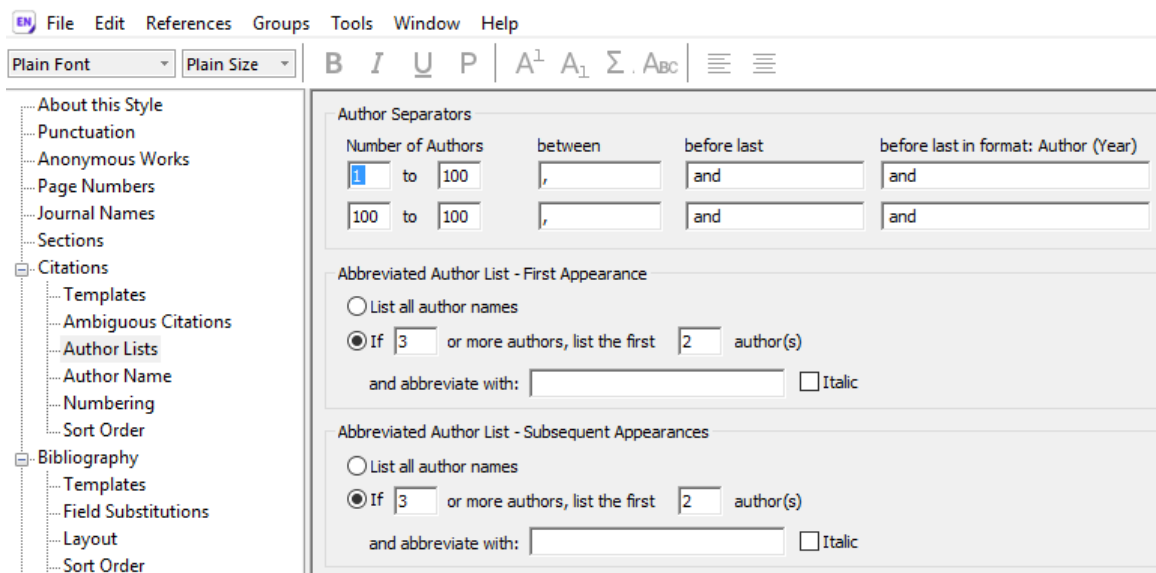
Format Page Numbers:

- Click on **Page Numbers** – choose option required – save style



Format Number of Authors Listed in Citation:

- Click on **Author Lists** – choose required option



The screenshot shows the EndNote X9 interface with the 'Author Lists' option selected in the left-hand pane. The main pane displays the 'Author Separators' and 'Abbreviated Author List' settings.

Author Separators:

Number of Authors	between	before last	before last in format: Author (Year)
1 to 100	,	and	and
100 to 100	,	and	and

Abbreviated Author List - First Appearance:

☐ List all author names

☒ If 3 or more authors, list the first 2 author(s)

and abbreviate with: ☐ Italic

Abbreviated Author List - Subsequent Appearances:

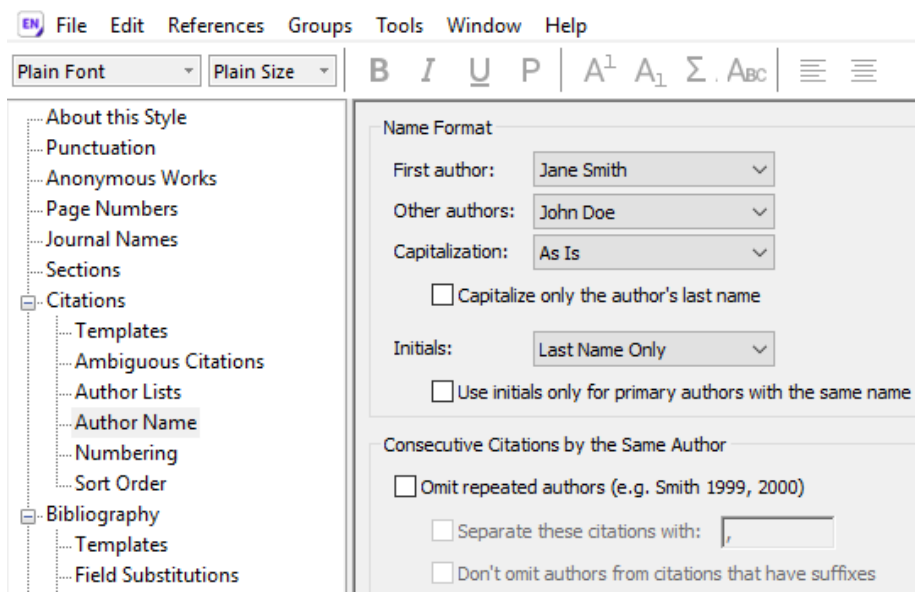
☐ List all author names

☒ If 3 or more authors, list the first 2 author(s)

and abbreviate with: ☐ Italic

Format How Authors Appear in Citation If Have the Same Last Name:

- Go to **Author Name** – choose **Use initials only....**



The screenshot shows the EndNote X9 interface with the 'Author Name' option selected in the left-hand pane. The main pane displays the 'Name Format' and 'Consecutive Citations by the Same Author' settings.

Name Format:

First author:

Other authors:

Capitalization:

☐ Capitalize only the author's last name

Initials:

☐ Use initials only for primary authors with the same name

Consecutive Citations by the Same Author:

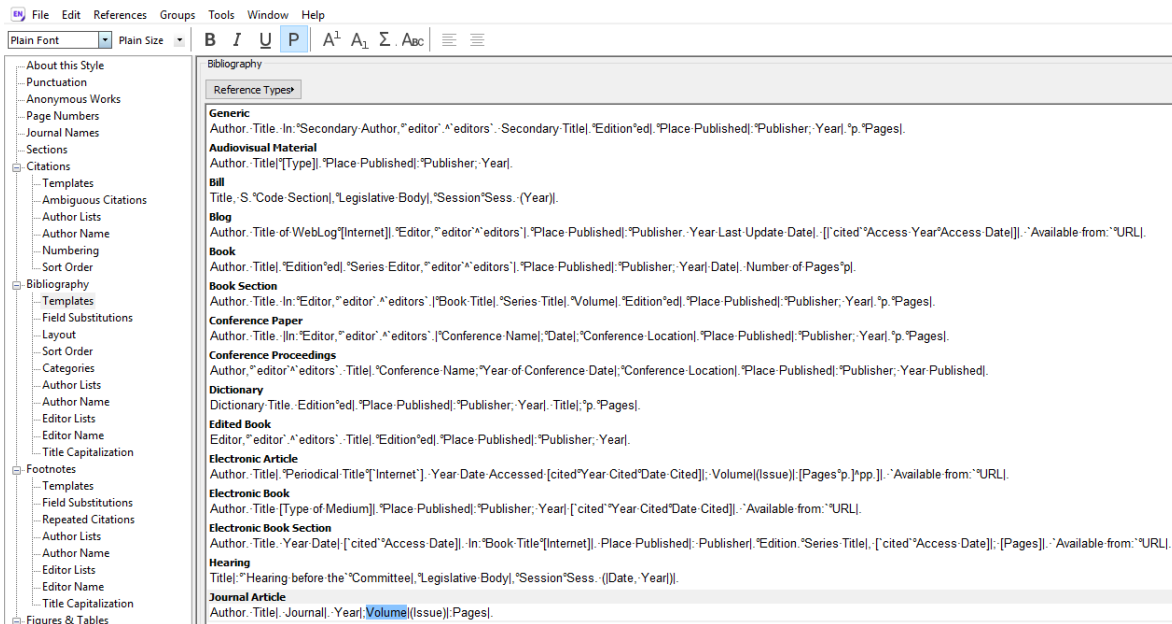
☐ Omit repeated authors (e.g. Smith 1999, 2000)

☐ Separate these citations with:

☐ Don't omit authors from citations that have suffixes

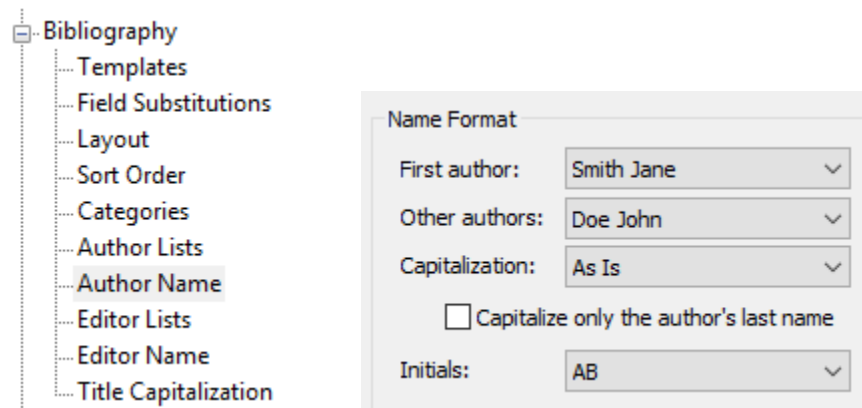
Volume of the journal article to bold:

- Go to **Bibliography > Templates > Journal Article > highlight Volume** and select **Bold**



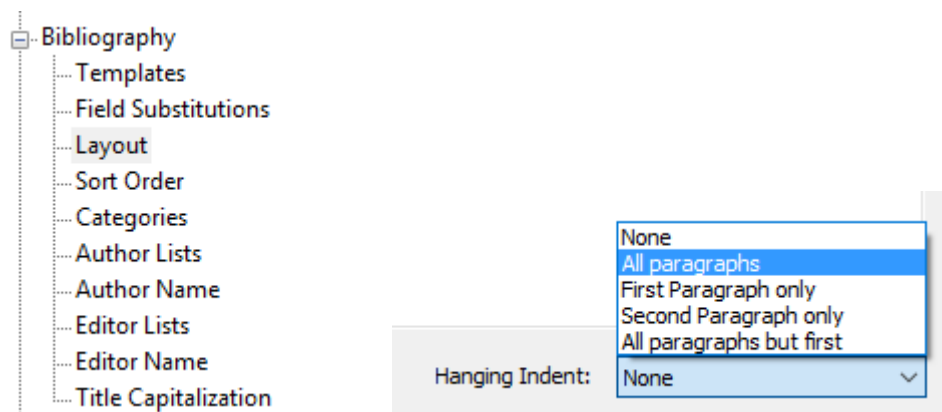
Author name to be capitalised:

- Go to **Bibliography > Author name > select from pick list**



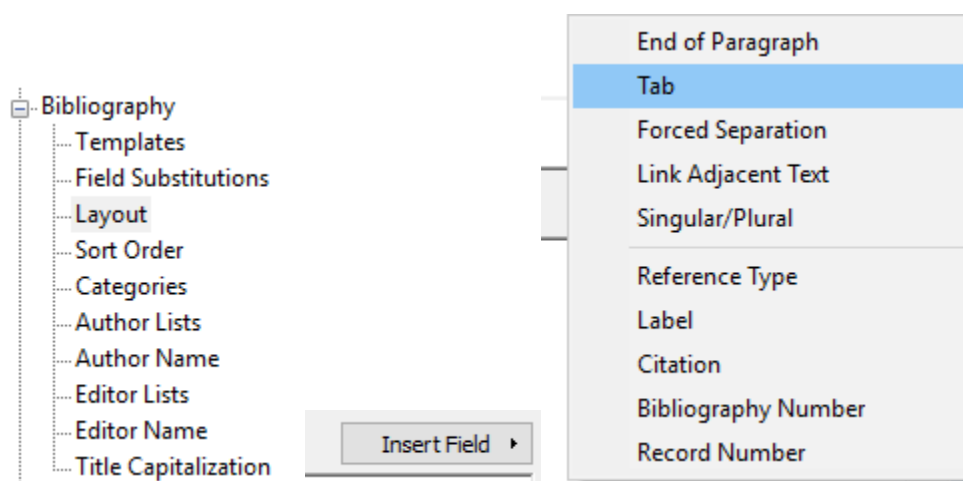
Hanging indents in your bibliography:

- Go to **Bibliography > Layout > Hanging indent** pick list (bottom right)



Inserting a tab after a hanging indent

- Go to **Insert field > use pick-list to select Tab** (arrow symbol)



Journals Term List

Note:

- Used to maintain the consistency and accuracy of journal titles and abbreviations.
- Some citation formats use abbreviations for journal name rather than the full journal name. EndNote uses the Journals Term List to substitute abbreviated journal titles for full journal titles.
- The Journals Term List allow for both the full and abbreviated titles to be entered, enabling you to switch between them depending on your output style.
- EndNote comes with a range of ready-made journal term lists, e.g. Bioscience, Chemical, Law, Medical and Humanities that can be imported into your library.
- They are located on your C Drive in your Programs File\EndNoteX9\Terms folder. For example, "Australian Journal of Earth Sciences" and two forms of abbreviation – one with full stops and the other without full stops - "Aust. J. Earth Sci" and "Aust J Earth Sci".

When To Use Term Lists:

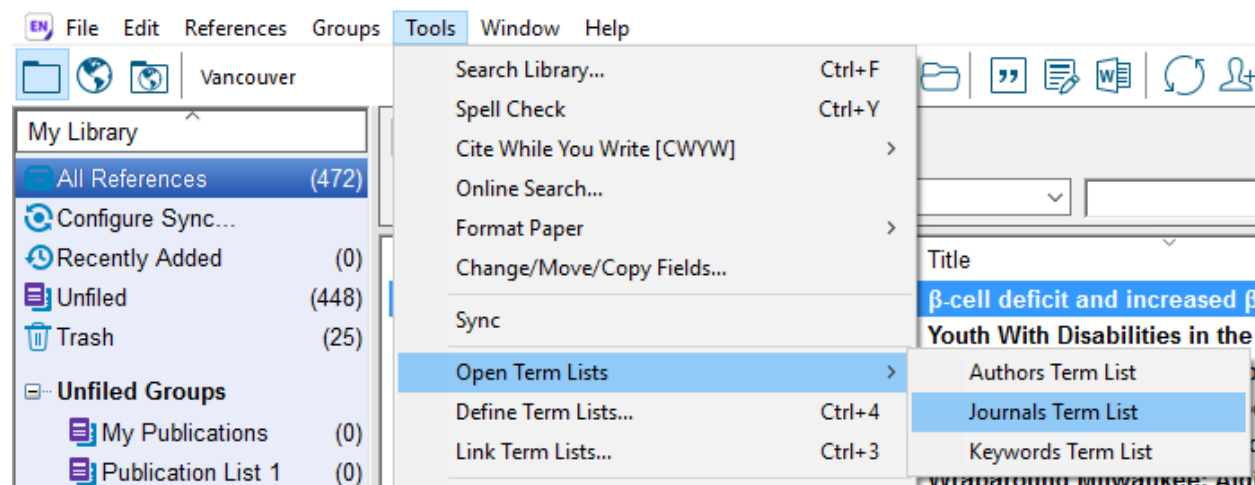
- To maintain consistency of journal titles.
- When your referencing style requires abbreviated journal names in your bibliography.
- When you import references from a database where the titles have appeared in abbreviated form, and your referencing style requires the full journal title.

EXAMPLE: Rockwood K, Graham JE, Fay S. Goal setting and attainment in Alzheimer's disease patients treated with donepezil. **J Neurol Neurosurg Psychiatry** [Internet]. 2002 [cited 2009 Mar 7];73(5):500-7. *The full title of the journal is Journal of Neurology, Neurosurgery and Psychiatry*

Installing a Journal Title Abbreviations Term List:

Import and Edit the Journals Term List:

1. In EndNote, go to **Tools > Open Term Lists > Journals Term List**.

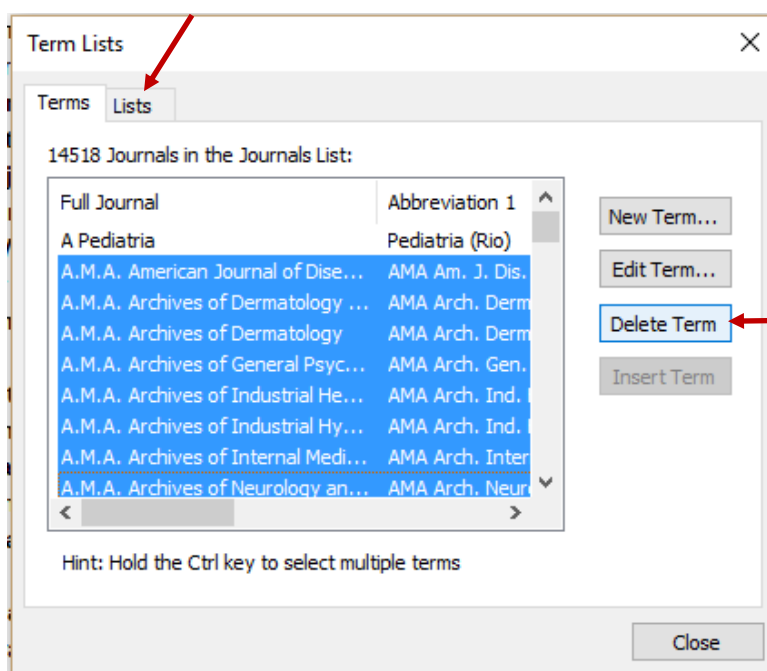


2. Highlight the first journal

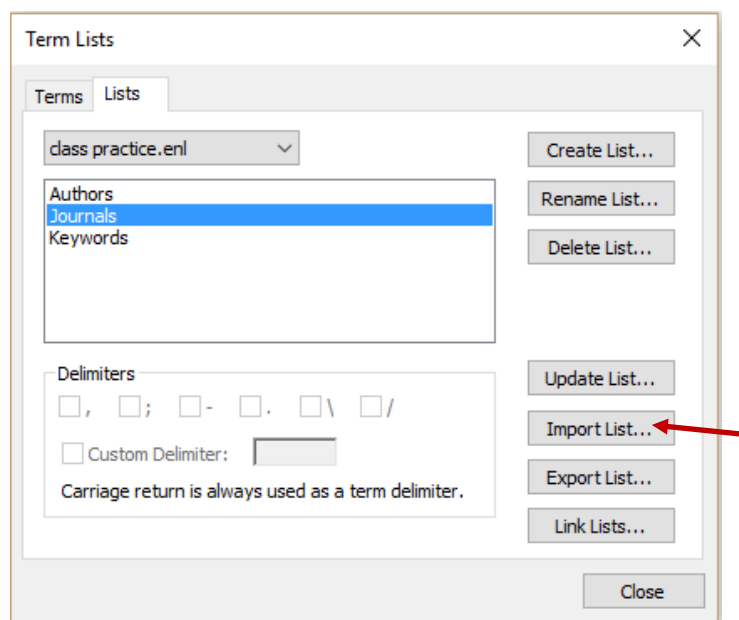
Windows: press [Ctrl]+A on the keyboard to highlight all the terms

Note: If the Journal Terms List is empty, skip to step 4.

3. Press the **Delete Term** button to the right to empty the list of old terms.



4. Go to the **Lists** tab at the top, and click on the **Import List** button.



5. Browse to the Term Lists folder within the EndNote folder, and open the terms list you wish to use.

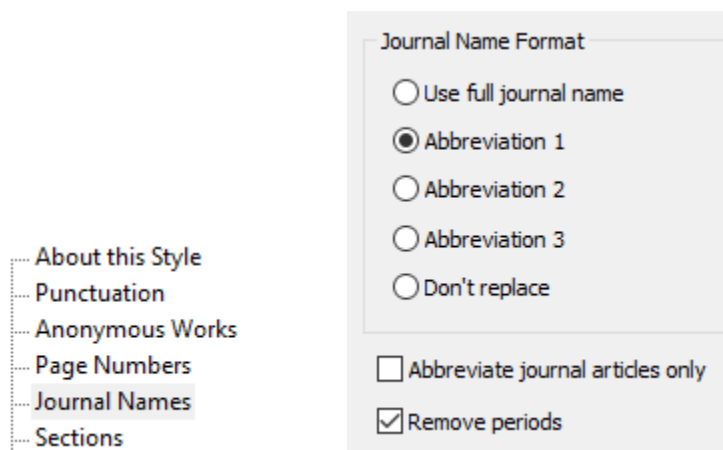
Windows: This folder should default to:

C:\Program Files\EndNote (EndNote Version Number)\Term Lists

6. Click **Open** to import the journal names and abbreviations from the file into the Journals term list.
7. To ensure the list is up to date press **Update List** this will add journal titles from the citation in your library.
8. To edit the list to add or modify journal name/abbreviations. Go to **Terms**, **Select** the journal you wish to edit, go to **Edit Terms...**

Modifying The Output Style So the Abbreviated Journal Name Is Used:

1. Make sure the style is using the correct substitution. Go to **Edit > Output Styles > Open Style Manager**.
2. In the list of styles, highlight the style you are using and click the **Edit** button.
3. Click on **Journal Names** on the left.
4. Make sure the style is using the full journal name or one of the abbreviations as needed.



Please note: Only use 1 term list at a time to avoid the problems associated with duplicate titles.

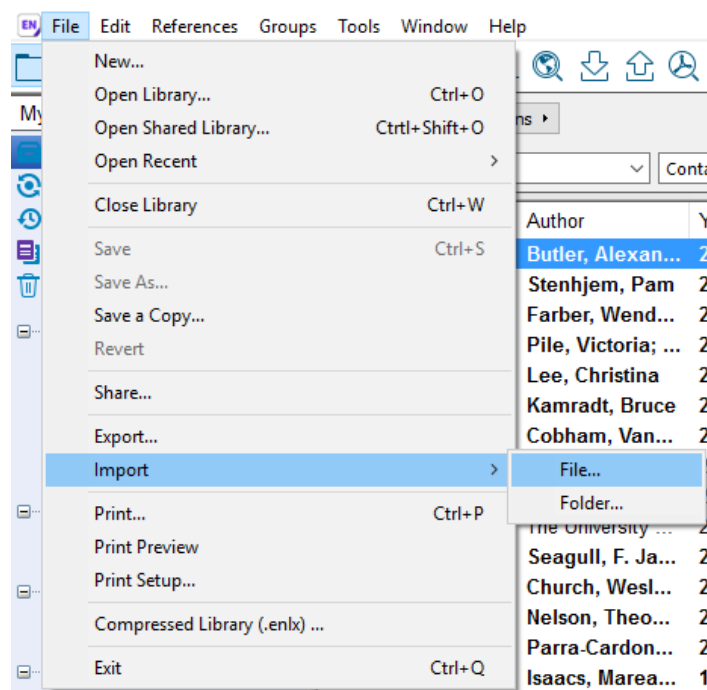
Combining Different Libraries

Note: You should always only use one library with one Word document. Using multiple libraries within one Word document can cause corruptions and other issues.

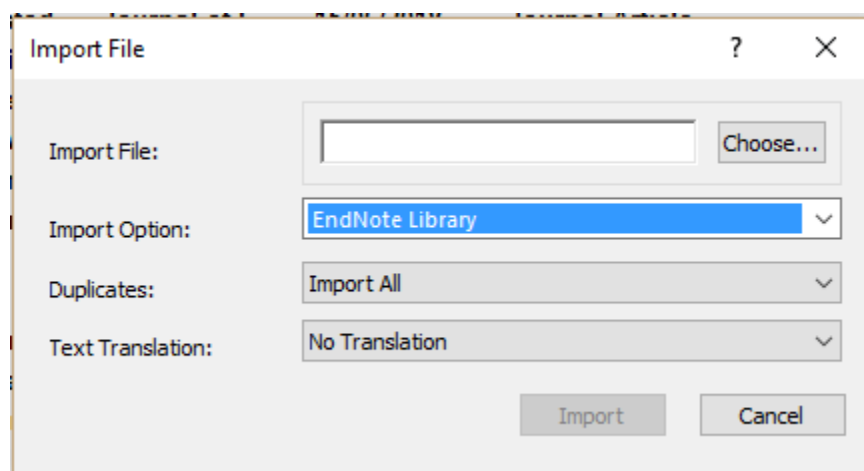
Importing One Library Into Another:

Do this PRIOR to adding references into a Word document.

1. Open your library.
2. Go to **File > Import > File**



- From the window that opens, choose the library you wish to import. In the **Import Option**, choose **EndNote Library**.



- Click on **Import**.
- All of the references of that library should now be imported and appearing in the library.

Adding References From Another Library:

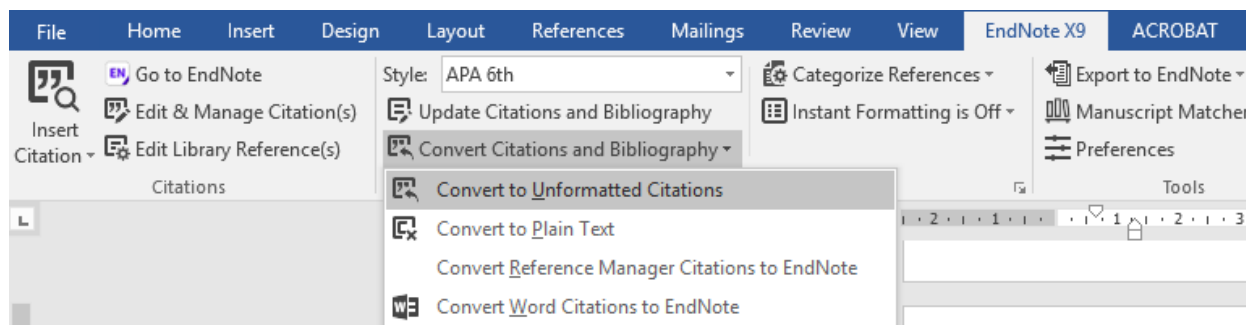
Do this **PRIOR** to using any references in a Word document.

- Open both libraries in EndNote.
- From the menu bar, select **Window > Tile Vertically**.
- Choose references to be transferred to the other library.
- Drag references into the other library.

Note that the record number is different in the new library.

Merging Chapters

1. Make sure all your chapters are **backed up**.
2. Your EndNote library must be open.
3. In Word, convert citations to unformatted in each chapter by clicking on **Convert Citations and Bibliography**.
4. Choose the **Convert to Unformatted Citations** option.



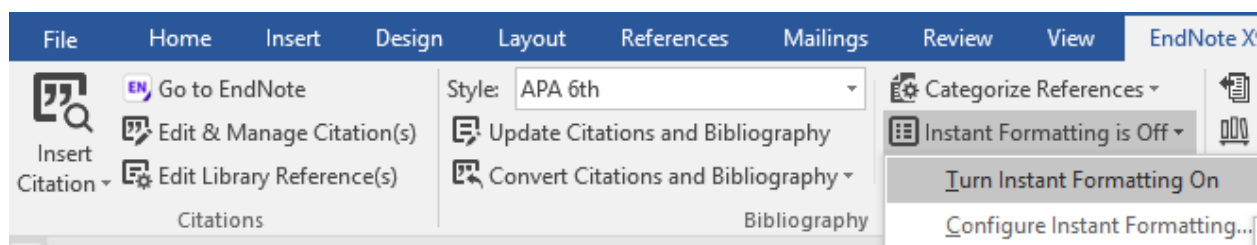
5. Open a new, blank document and save it.
6. Copy and paste each chapter into the new document.
7. Place cursor at the end of the document and click on **Update Citations and Bibliography**.

Instant Formatting

When your document gets large, each time you enter a new reference it will take a long time to update because it has to format the entire document with Cite While You Write.

To prevent this:

1. In Word, go to the EndNote tools. Click on **Convert Citations and Bibliography** and choose **Convert to Unformatted Citations**.
2. In the **Instant Formatting** option, choose **Instant Formatting is Off**.



3. This will stop the document having to reformat each time you enter a new reference. It will show them in the unformatted style.
4. To turn the instant formatting back on, click on **Instant Formatting is Off** and click on **Turn Instant Formatting On**.
5. The citations should be reformatted automatically. If not, click on **Update Citations and Bibliography**.

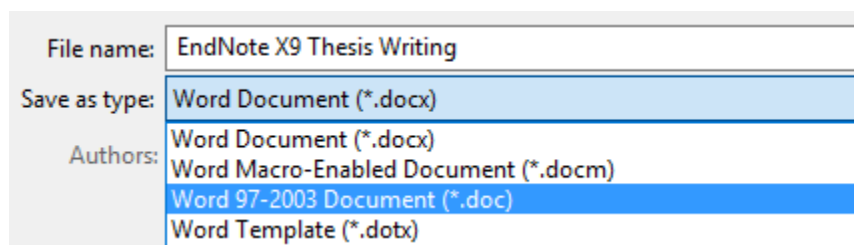
Using References in Text Boxes:

https://support.clarivate.com/Endnote/s/article/EndNote-Citation-numbers-out-of-order?language=en_US

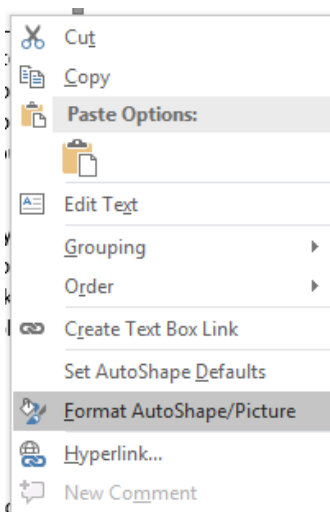
- This affects numbered styles the most.
- In-text references added to text boxes will not appear in the correct numbered sequence. This is because EndNote will format in-text references in text boxes **first**. They will appear at the top of your reference list.
- You need use **Frames** rather than text boxes.

Converting Text Boxes To Frames:

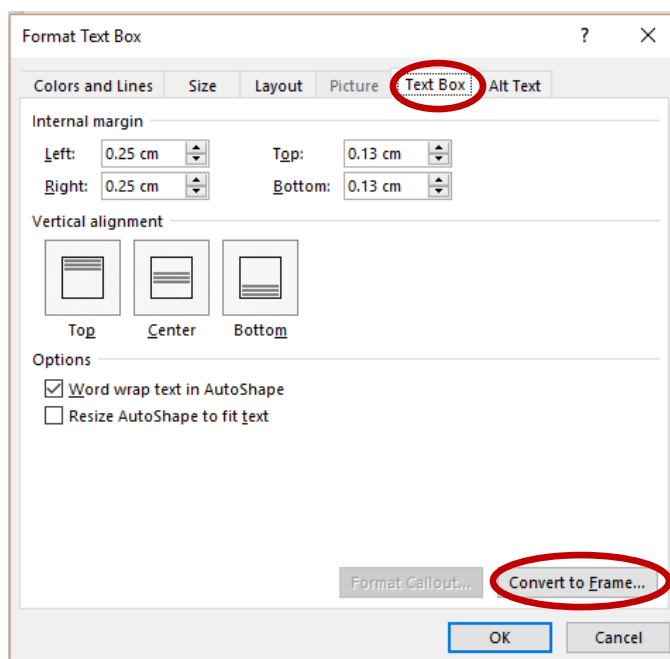
1. Save a backup copy of your document.
2. Go to **File > Save As**. Save the document in Compatibility Mode by selecting **Word 97-2003 Document** in the **Save As Type** option. Click **Save**.



3. Locate one of the text boxes that contains an EndNote citation.
4. Right-click on the text box and choose **Format AutoShape/Picture**.



5. Select the **Text Box** tab and click the **Convert to Frame** button. Click **OK**.



6. Click on **Update Citations and Bibliography** and check on the numbers in your reference list.

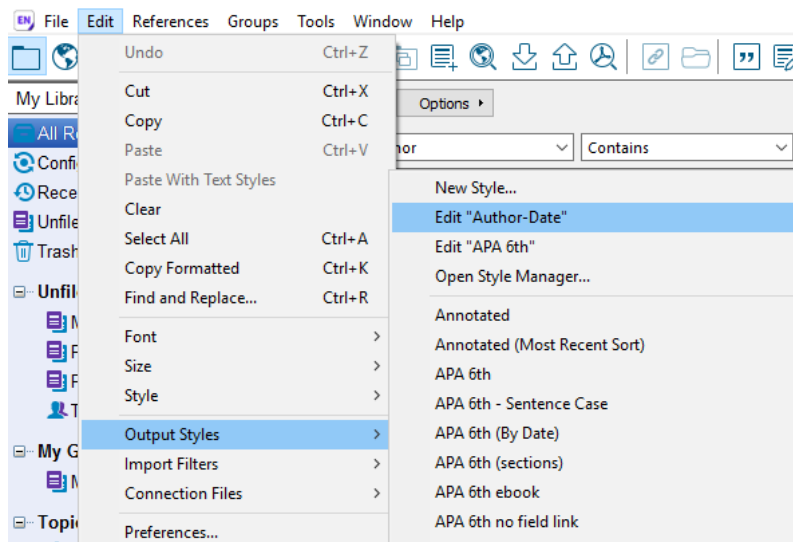
Creating Reference List at End of Each Chapter

1. Modify the output style required.
2. Include section breaks at the end of each chapter in your manuscript.

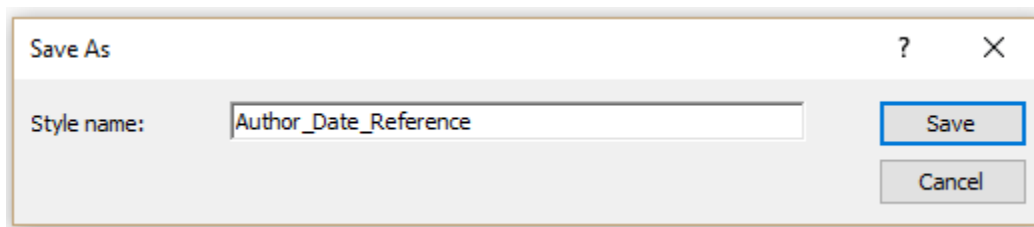
Note: This cannot be done if you are using section breaks elsewhere in your document.

Modify the Style:

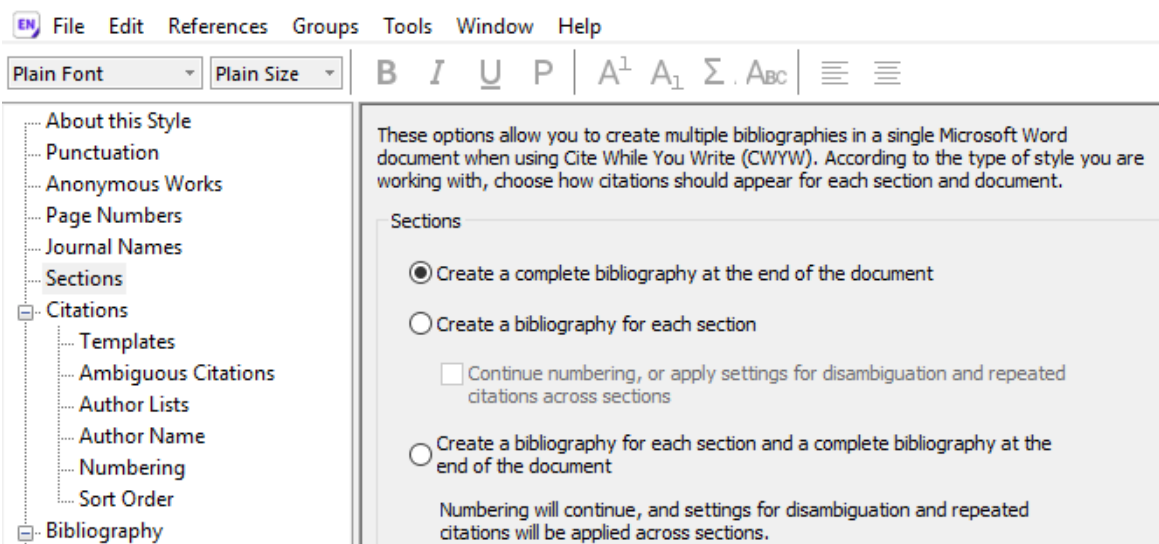
1. From the EndNote Library, go to **Edit > Output Styles > Open Style Manager**.
2. Choose the style you wish to modify. If it not in this initial list, go to **Open Style Manager** and select the one you want. Click on **Edit.....[style name]** (e.g. Author_date)



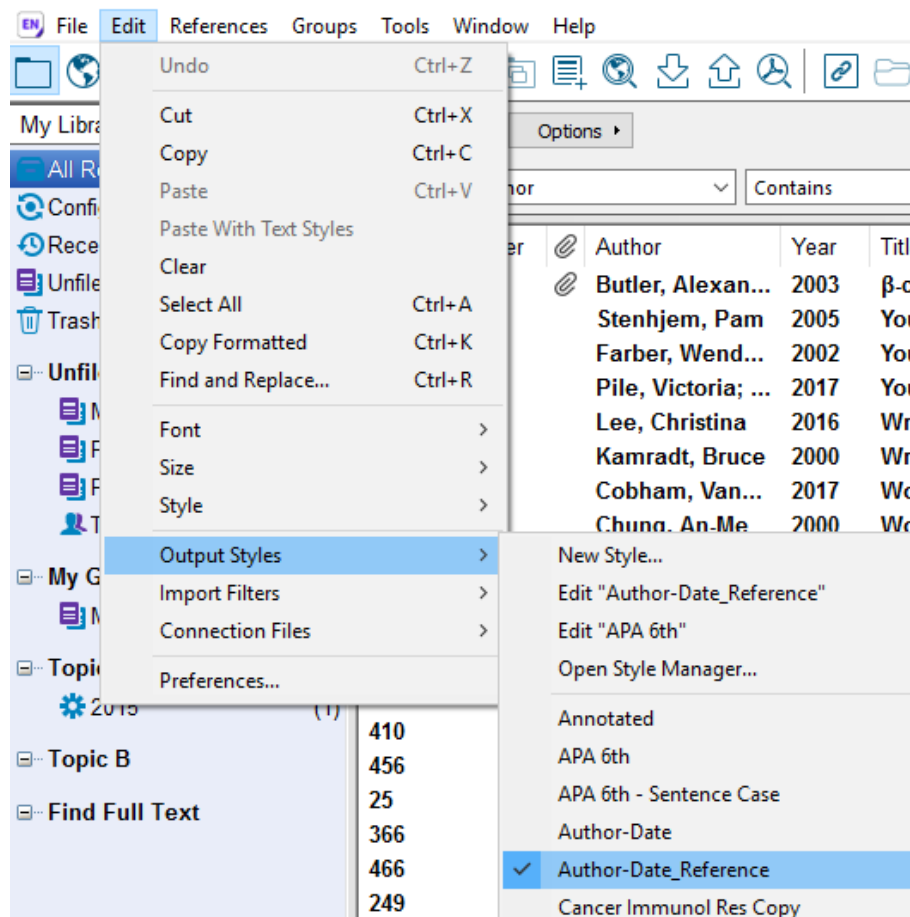
3. Save and rename the modified style e.g. Author_Date_Reference



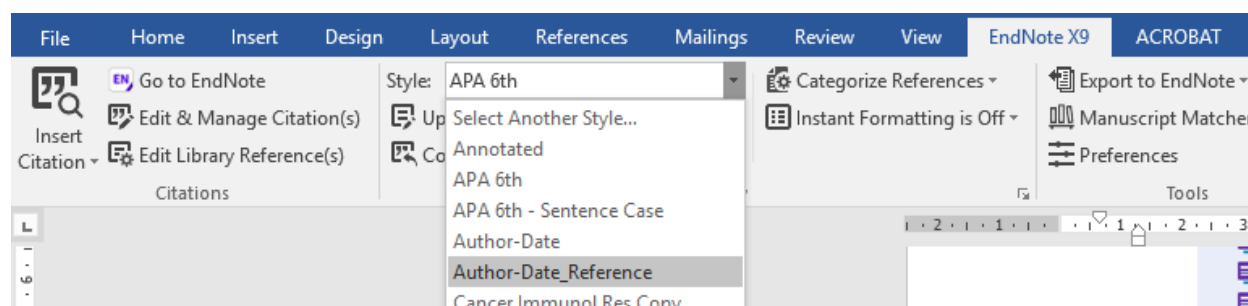
4. From the left-hand column, select **Sections** open. Check the **Create a bibliography for each section** option.



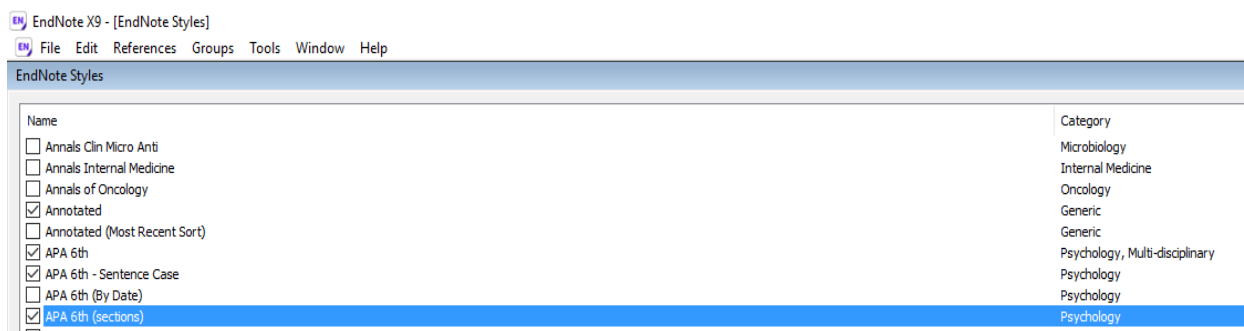
- Go to **Edit > Output Styles > Open Style Manager** and choose your new style to include in your list of preferred output styles. Click on **Edit > Output Styles** again. Your new style should be appearing on the list. Click on it to select it.



- This style should now also appear in your EndNote toolbar in Word.

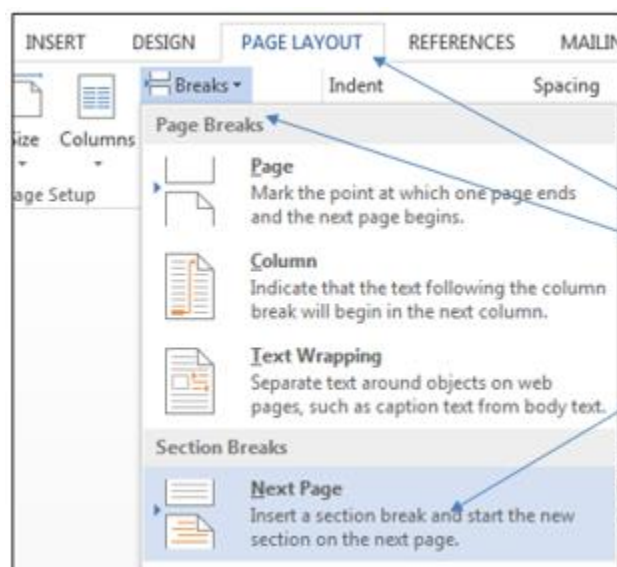


Note: You may be lucky to avoid this first step, as the EndNote program does include variations of styles for sections eg. APA 6th – sections. Check the list in the Style Manager to see if your style has a sections version.

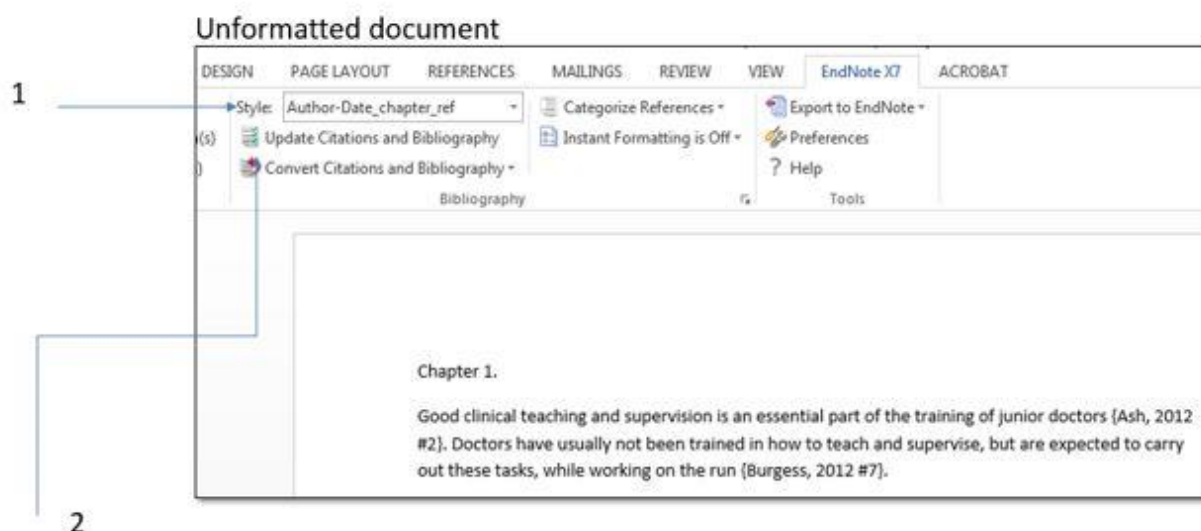


Adding Section Breaks in Word:

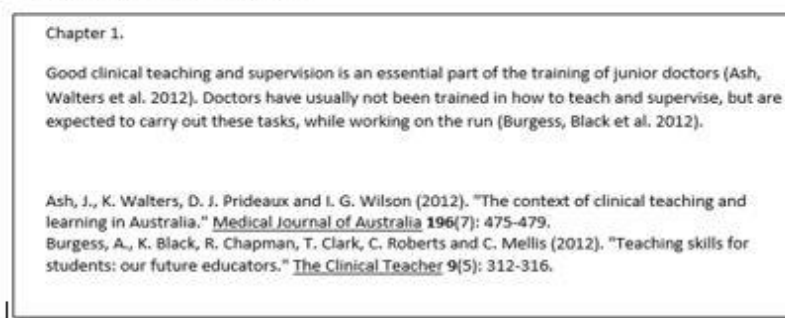
1. In Word, ensure all citations are unformatted.
2. Insert a section break at the end of each chapter by going to: **Page Layout > Breaks > Next Page**



3. Go to the EndNote toolbar in Word. Ensure that your sections style is in the Style box. Select **Update Citations and Bibliography**.



Formatted document



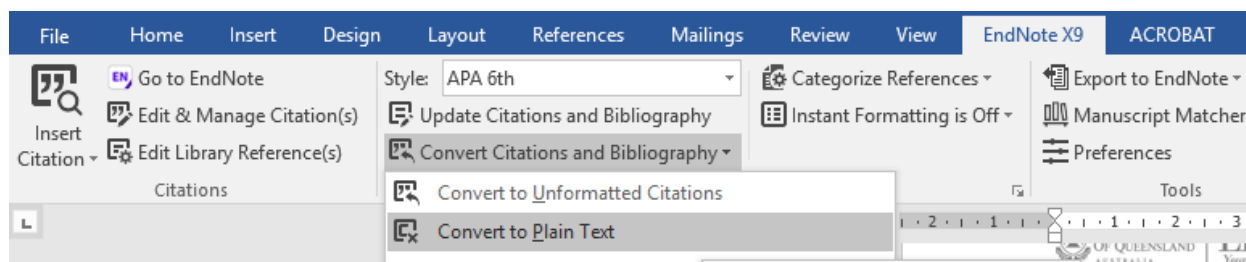
Using Track Changes and EndNote

Recommend not using Track Changes in an EndNote document.

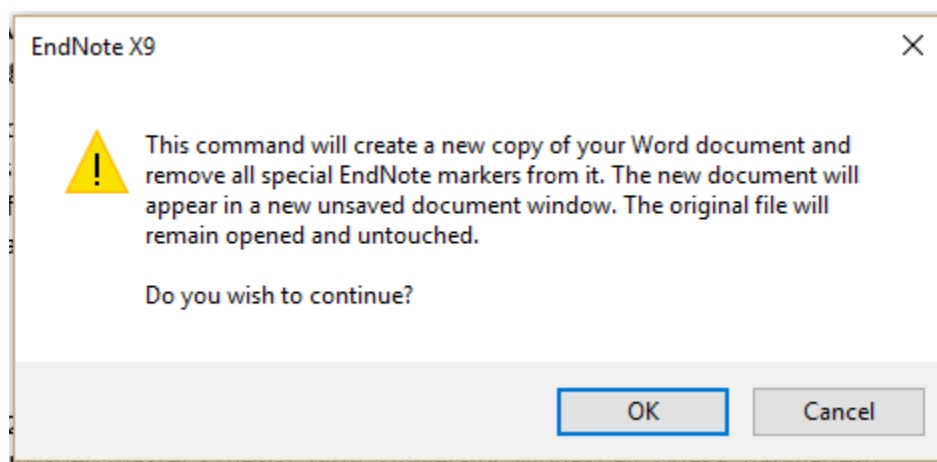
- Can cause issues such as Word tools disappearing, Word freezes when attempting to use Word tools or the wrong references may be linked in a document.
- Best option to avoid potential issues – convert document to plain text and send that version to your supervisor.

How to Convert to Plain Text:

1. Make sure your document is saved.
2. Go to the EndNote tools in Word. Click on **Convert Citations and Bibliography** and choose the **Convert to Plain Text** option.



3. A message box will appear explaining it will create a copy that is plain text while keeping the EndNote linked version.



4. Save the untitled plain text copy.
 - Send the plain text copy to your supervisor where they can use track changes.
 - Manually make required changes to your EndNote linked document.
 - Repeat with a new plain text version each time the document is sent to your supervisor.

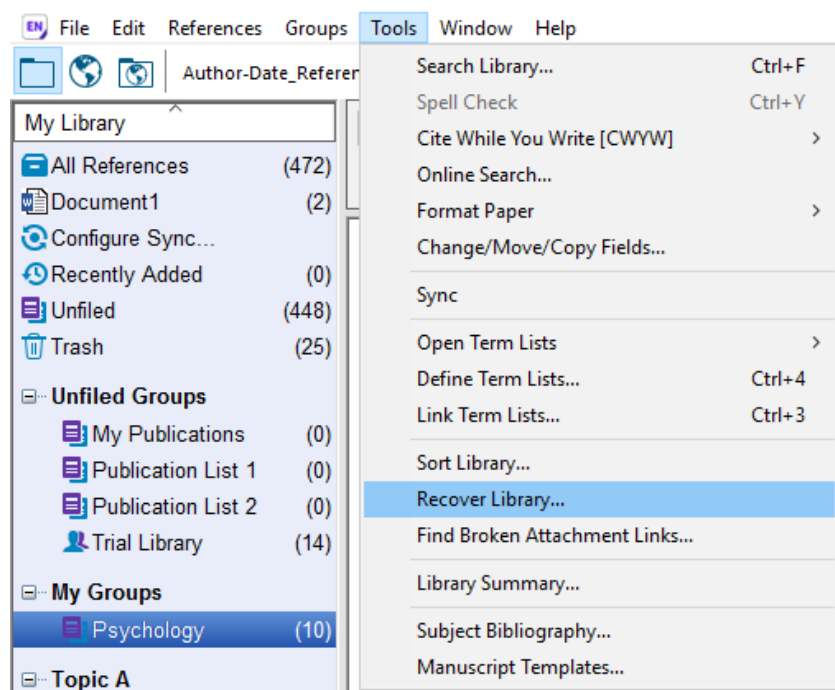
EndNote Disaster Recovery: My EndNote library is damaged or deleted

- The best way to avoid a disaster is to have backup copies of your document, EndNote library and data folder.
- If your backups are on cloud storage, copy the files to a local drive before opening them.

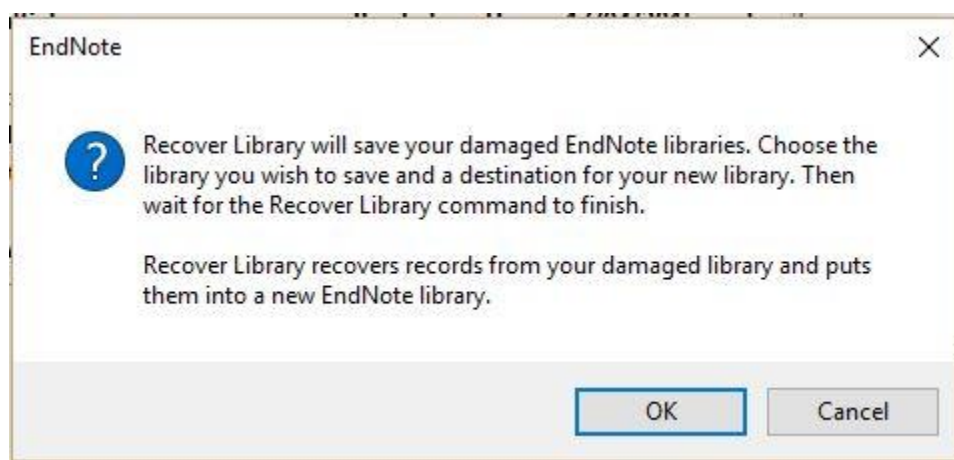
Using the Recover Library Function:

The **Recover Library** function can, in many cases, be used to repair a corrupted library.

1. Close the library if it is currently open.
2. In EndNote, go to **Tools** and click on **Recover Library**.



3. A window will appear explaining what EndNote is about to do. Read the information then click **OK**.



4. You will then be asked to select the library that needs to be repaired and click **Open**.
5. EndNote creates a copy of the library with the suffix "-Saved" added to the file name. Open this file and the library should be restored.

Rebuilding a Library from the .Data file:

Try this option if you have accidentally deleted the .enl file of your library. If you still have the .Data file, you should be able to rebuild your library.

1. Copy the .Data folder to a new location.
2. Open **Notepad** (in **Windows Accessories**).

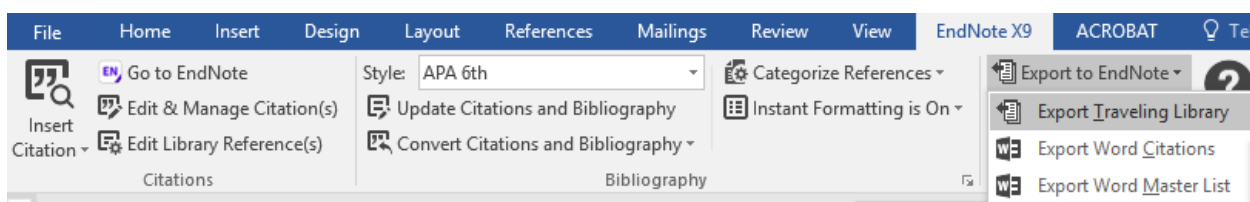
3. Use **Save As** to create an empty file with exactly the same name as the data folder. Change the file extension from .txt to .enl . Make sure the new file is saved in the same directory as the .Data folder.
4. Open the newly created .enl file by double clicking on it and the library should open in EndNote.

Rebuilding a Library With The Traveling Library:

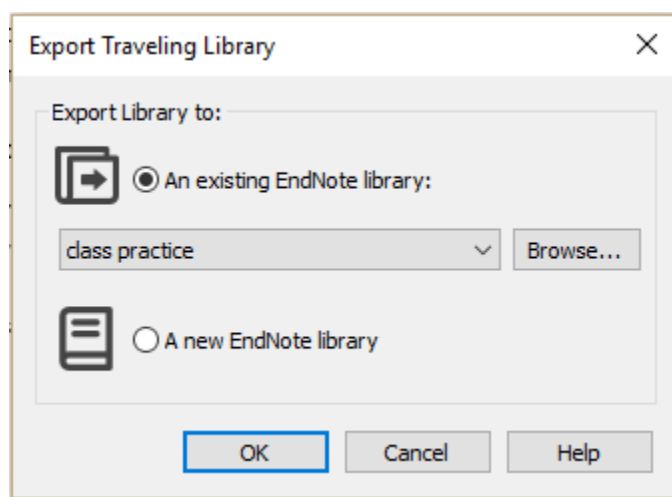
This can be used if you have lost both your .enl and .Data files

If you have a Word document that contains some or all of your lost references, you can use the **Traveling Library** tool to recover the references in the Word document and recreate an EndNote library.

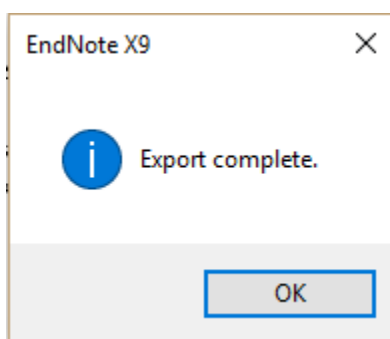
1. Go to the **EndNoteX9 tab** in the Word document.
2. Go to **Export to EndNote > Export Traveling Library**.



3. You can choose to export the library to an existing one or a new one. Choose the **A new EndNote library** option.



4. Name and save the new library. Once all the references have been exported, a message saying **Export complete** will appear.



5. You can now open the library you created in EndNote.

Note: The record numbers of the references will have changed and none of the PDFs or groups will be restored.

Help

- Contact your librarian. Their details can be found at
 - <https://web.library.uq.edu.au/library-services/liaison-librarians>
- AskUs:-
 - Available UQ Library opening hours (check website for current hours)
 - Email: askus@library.uq.edu.au
- UQ Library EndNote Help
 - <https://web.library.uq.edu.au/research-tools-techniques/referencing/referencing-software/EndNote/using-EndNote>
- Clarivate Analytics EndNote Help
 - http://clarivate.libguides.com/endnote_training/home