

EndNote 20: Getting Started (Windows)

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WINDOWS VERSIONS X9.3.3 AND ABOVE

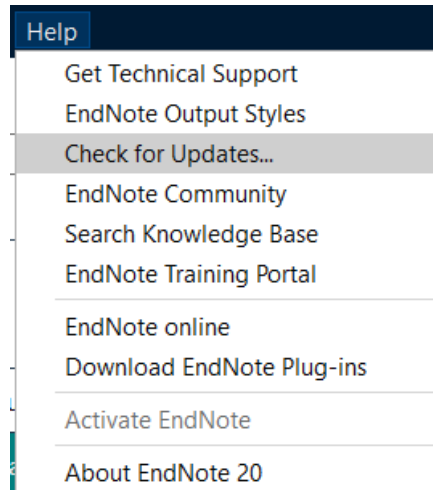
- From late 2019, Apple no longer supported 32 bit software. EndNote Mac changed to a 64 bit program.
- Libraries (EndNote files) created in Mac version X9.3.2 and above were not compatible with any Windows version earlier than X9.3.2 or with earlier Mac versions.
- Windows EndNote version X9.3.3 and 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**.
- 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 the on screen prompts.

BACKING UP YOUR LIBRARY:

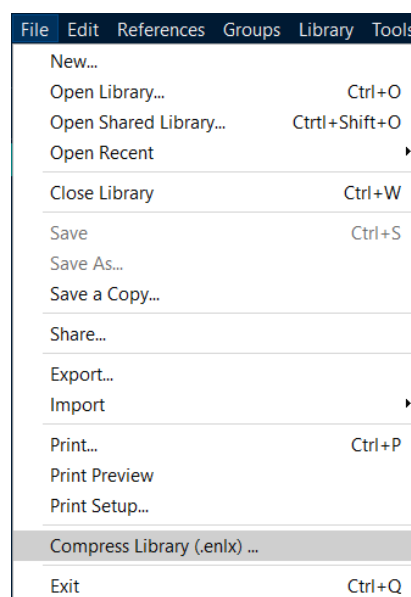
- Save 3 copies in 3 locations
- Do not use a backup as your working library unless it is needed.
- Using the **Compressed Library** option in EndNote is recommended for creating backups.

Creating A Compressed Library:

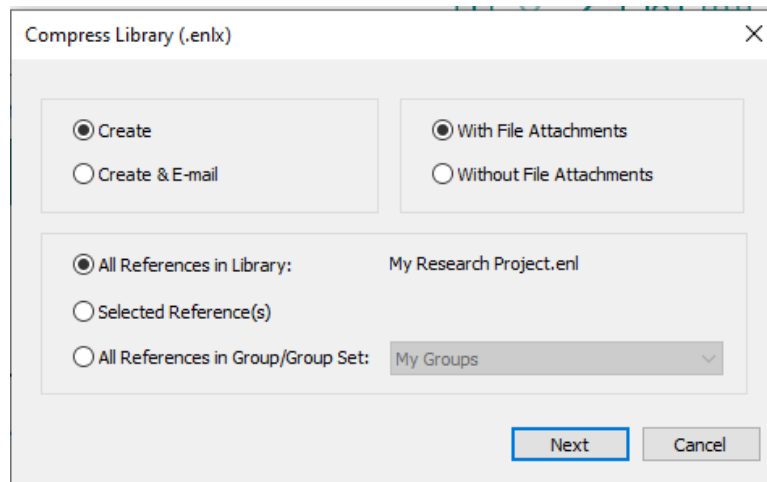
When an EndNote library is created, two files are produced. One has an .enl file extension eg. My Thesis Library.enl and the other is a folder with the same name but ending in .DATA eg. My Thesis Library.DATA. These files must remain together for your library to fully function.

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 3May2020. Click on **Save**.
5. Add to your backup locations.
6. To open the file, double click on it on any computer with EndNote installed.

Recommended:

- Don’t use a USB or external drive that is easier to misplace.
- University servers
- Web email account (not linked to social media, online shopping etc)
- Computer hard drive
- It is recommended to back up at least once a week.

File Naming:

- Make it descriptive but not too long or you may eventually get an error message
- Don’t include spaces in the file name. Use underscores or hyphen to separate words or capitalize the first word.
- Include the date and “Backup” in the filename.

Note:

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

CLOUD STORAGE:

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

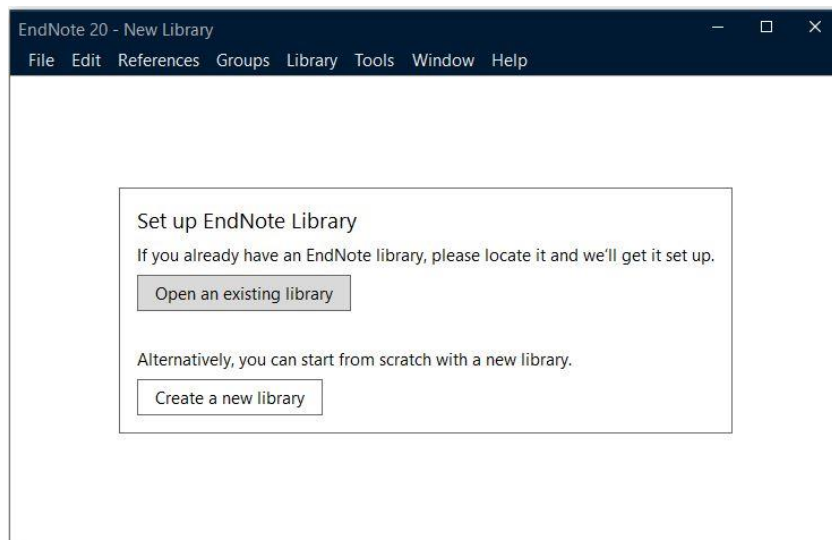
- **Do not work on your EndNote library from a cloud storage drive.** Issues such as corrupted libraries can occur.
- Cloud storage can be used as storage, eg. backing up, or as a way of accessing your EndNote library from different locations.

- To work on your 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:

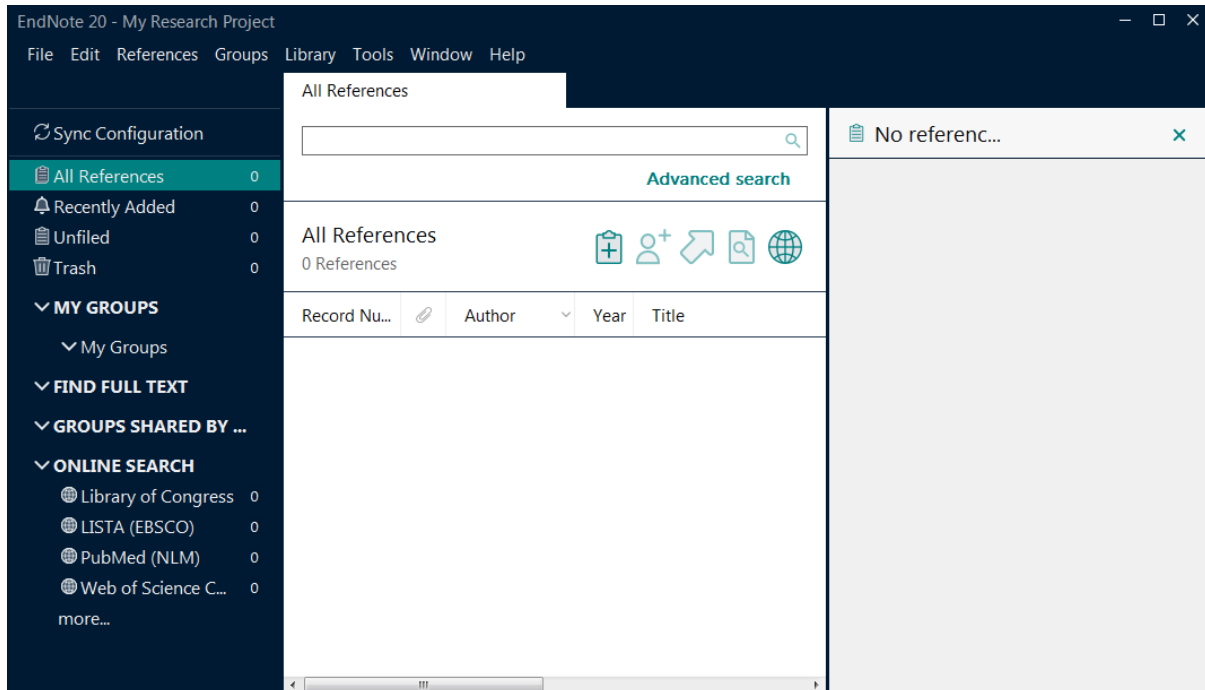
- A library is what EndNote calls the file in which you store your references.
- It is possible to create as multiple libraries. However, we recommend **one library** for all your research, especially for all chapters of a thesis. This helps with keeping your references and research in one place.

When EndNote first opens, you can create a new library or open an existing one.



In EndNote:

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.



ADDING REFERENCES TO YOUR LIBRARY:

Direct Export:

- Direct export is where you can add references to your library by exporting them from a search tool eg. database.
- Different search tools handle exporting in different ways. Two of the most common methods are:-
 - Clicking on an icon (often a folder) on the right 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.

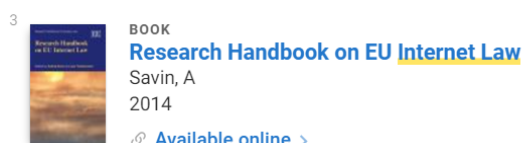
Exporting From Library Search:

Make sure you are logged into the Library Search.

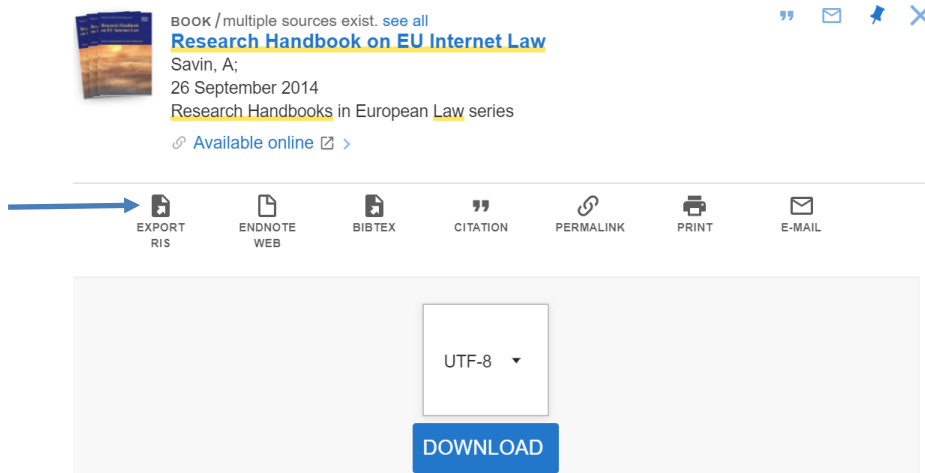
Log in to access full text, more search results and more services. Refresh this page if you are logged in but still see this message [Log in](#) | [DISMISS](#)

Single Reference:

1. Click on the **Save, email, cite, export record** button (three horizontal dots) that appear on the right of the record.



- Click on **Export RIS** then click on the **Download** button.




BOOK / multiple sources exist. [see all](#)
[Research Handbook on EU Internet Law](#)
 Savin, A;
 26 September 2014
 Research Handbooks in European Law series
[Available online](#) >

EXPORT RIS ENDNOTE WEB BIBTEX CITATION PERMALINK PRINT E-MAIL

UTF-8
 DOWNLOAD

Multiple References:

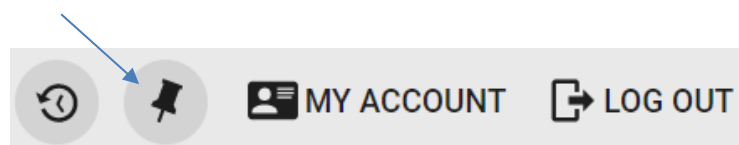
- Select the references you want to export into EndNote. Click on the pin icon that appears on the right of each record so it appears as crossed out.



ARTICLE
[Internet and law \(special reference to Sri Lanka\)](#)
 Dinithi Jayasekara, A.H.
 Social Sciences (Pakistan), 2015, Vol.10(6), pp.841-844[Peer Reviewed Journal]
[Available online](#) >

BOOK
[Research Handbook on EU Internet Law](#)
 Savin, A
 2014
[Available online](#) >

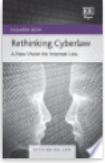
- The references will be added to **My Favourites**. Once all the references you want are selected, click on the **My Favourites** pin icon at the top right corner of the screen.



- You will then be taken to the **Saved Items** area of your account. Choose the ones you wish to export.

SAVED ITEMS SAVED SEARCHES SEARCH HISTORY

4 items

☒

BOOK
Rethinking cyberlaw a new vision for Internet law / Jacqueline Lipton.
 Lipton, Jacqueline D.
 2015
[Available online >](#)

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

My favourites ADD LABELS ...

SAVED ITEMS SAVED SEARCHES **"Export to" actions** SEARCH HISTORY

5. Click on the **Export RIS** icon then the **Download** button.

My favourites ADD LABELS ...

EXPORT RIS ENDNOTE WEB BIBTEX PRINT E-MAIL

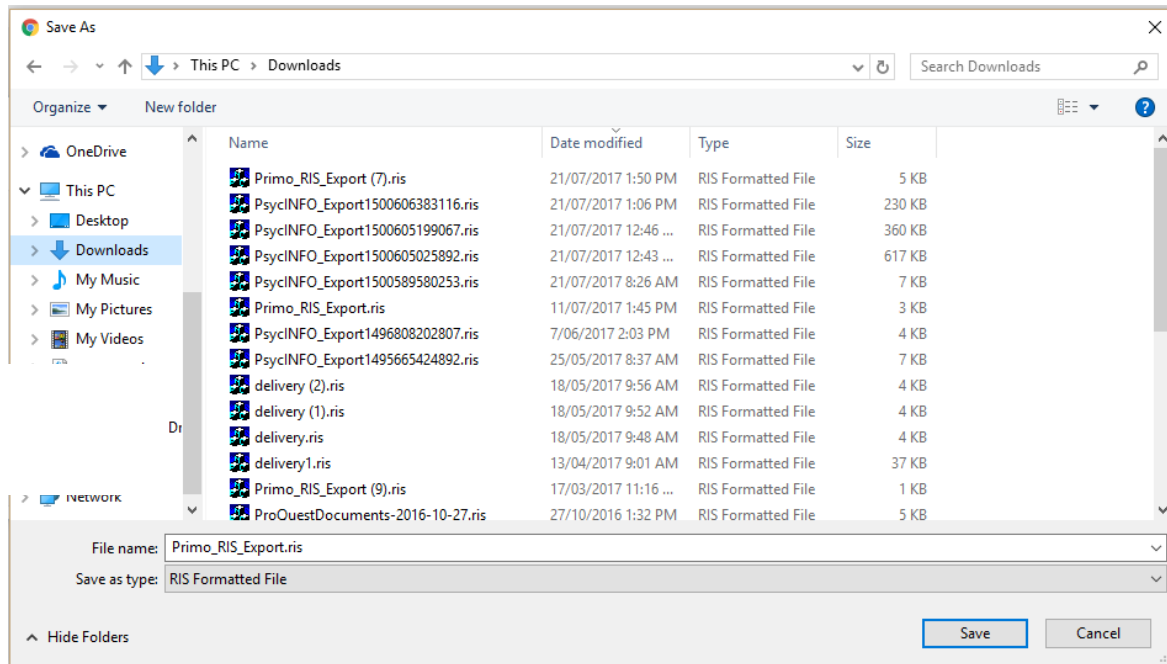
UTF-8 ▼

DOWNLOAD

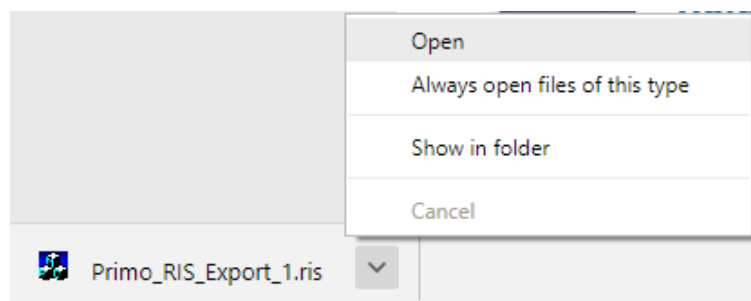
6. Chrome and Firefox handle the direct export differently.

Chrome:

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



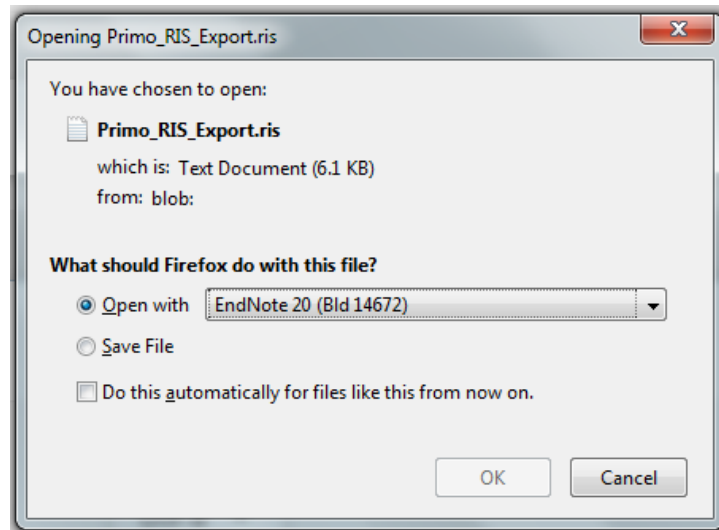
- The file will then be downloaded into this folder and display as a button at the bottom of your screen.
- Click on the arrow to the right on this button and choose **Open**. (You can also click on **Always open files of this type** then click on **Open** to have this file type download automatically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



- The records will now be sent to EndNote.

Mozilla Firefox:

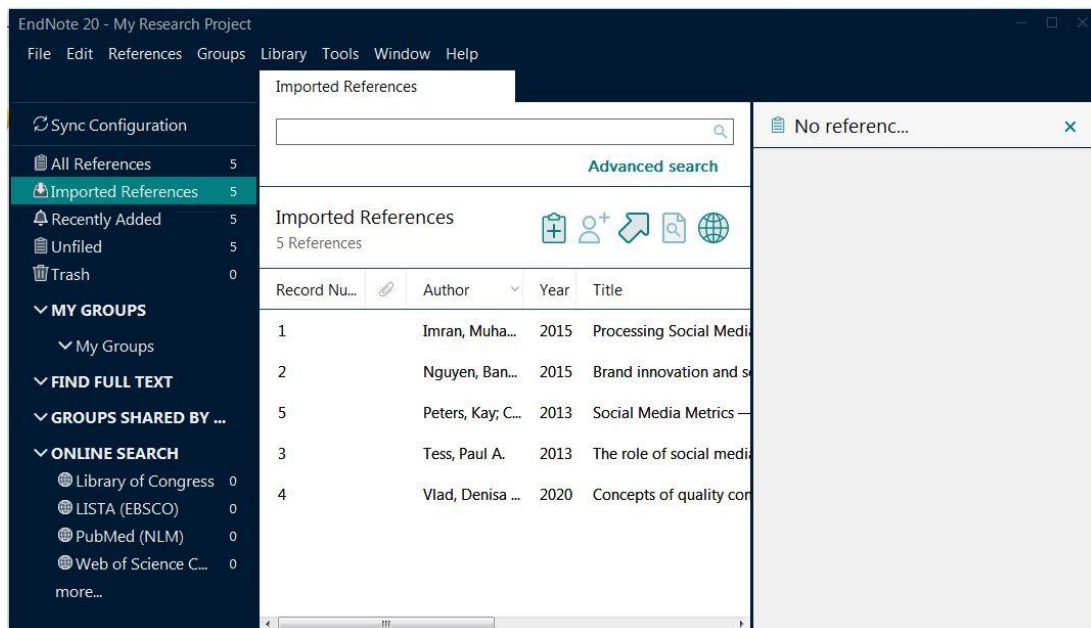
- In the window that appears, go with the default option and click on **OK**.



- The references will now be added to EndNote.

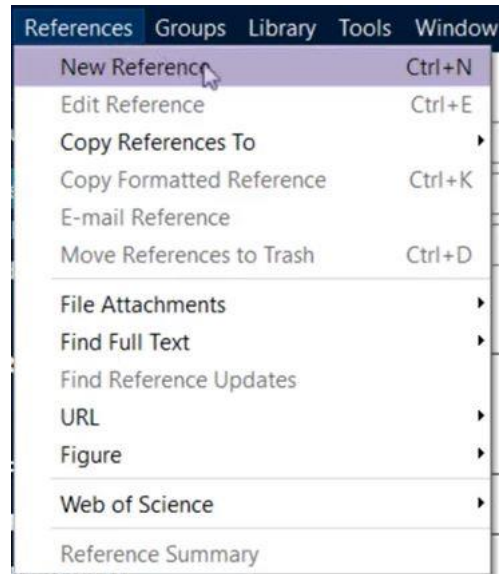
Imported References:

Each time references are imported, they are added to a temporary group called **Imported References** as well as the **All References** group.



Manual Entry:

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

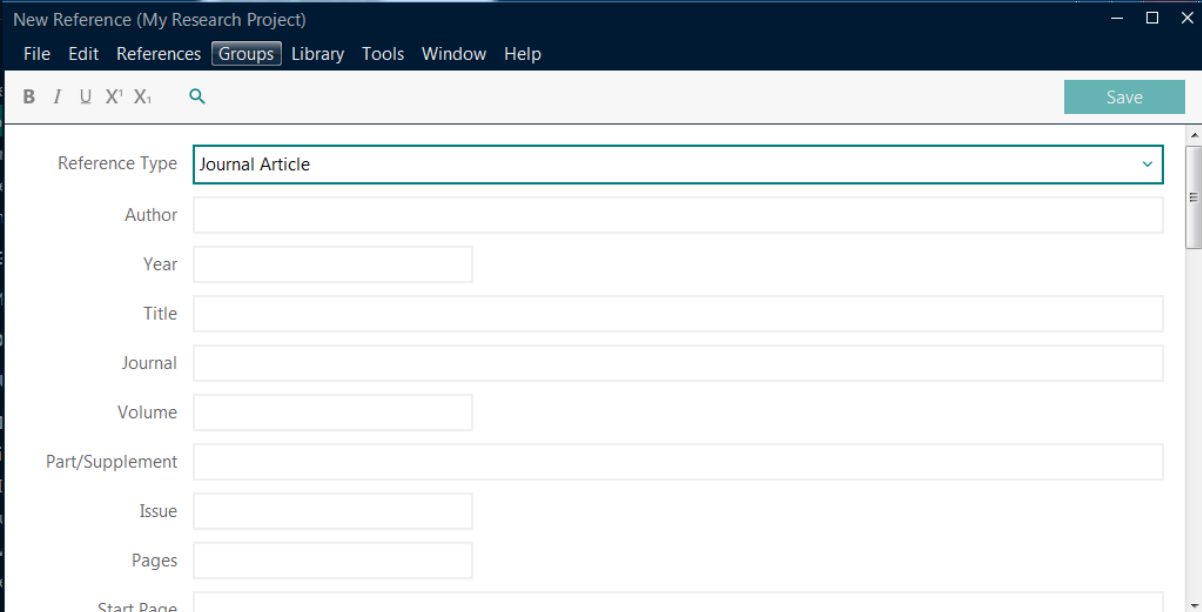


3. You can also click on the icon at the top of the middle pane.

All References
 8 References



4. Another window will open. Choose the reference type eg. book from the **Reference Type** drop down menu.



5. Enter the information in the relevant fields. (It is not necessary to fill in all the fields.)
6. 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 group author (institution, company government department), 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 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:

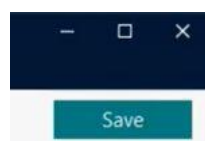
VOLUME NUMBER: just enter the number eg. 123

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

YEAR: just enter the year eg. 2010

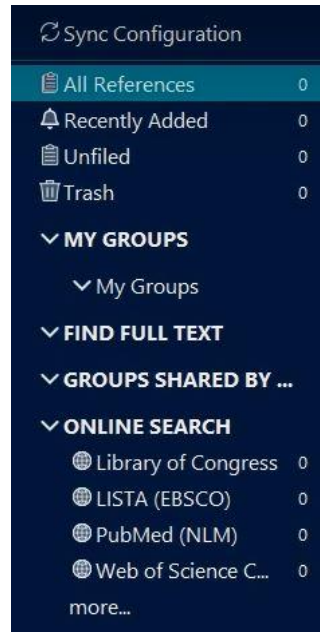
PLEASE NOTE: EndNote will add any necessary labels required by the style you choose.

7. Click on **Save** (top right) and close the window. You can also click **File > Save**.



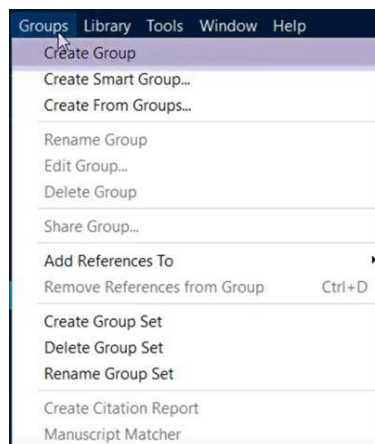
USING GROUPS:

- 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**.

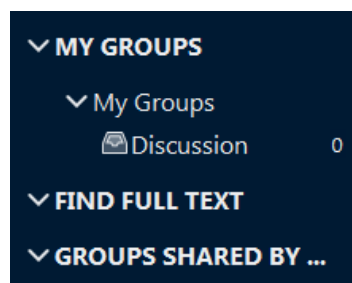


Creating A New Group:

1. Click on **Groups** in the menu bar and click on **Create Group**.



2. Add your group name and press Enter.



Adding References To A Group:


1. Click on the **All References** group. Highlight the reference(s) you want to add.
2. Drag and drop them into the relevant group.


3. You can also right click on the highlighted reference(s) and click on **Add References To**. Select the relevant group.

MANAGING YOUR REFERENCES:

Editing a Reference:

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


Nesi, 2018 #8
Summary
Edit
×


nihms-1014262.pdf
+ **Attach file**


Transformation of Adolescent Peer Relations in the Social Media Context: Part 1-A Theoretical Framework and Application to Dyadic Peer Relationships

J. Nesi, S. Choukas-Bradley and M. J. Prinstein

Clin Child Fam Psychol Rev 2018 Vol. 21 Issue 3 Pages 267-294

Accession Number: 29627907 PMCID: PMC6435354 DOI: 10.1007/s10567-018-0261-x

3. Make the changes to the record.


Nesi, 2018 #8
Summary
Edit
×

B *I* U **X¹** **X₁**
🔍
Save

Reference Type Journal Article ▼

Author Nesi, J.
Choukas-Bradley, S.
Prinstein, M. J.

Year 2018

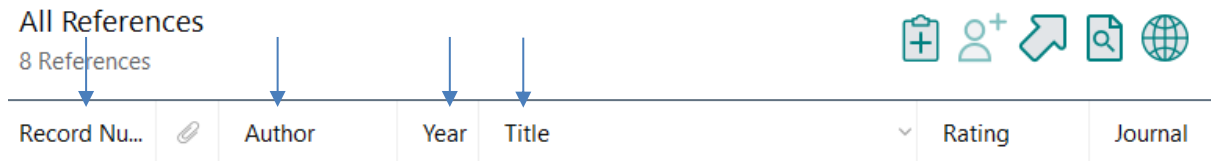
Title Transformation of Adolescent Peer Relations in the Social Media Context: Part 1-A Theoretical Framework and Application to Dyadic Peer Relationships

Journal Clin Child Fam Psychol Rev

4. Click on the **Save** button or click **File > Save**.

Sorting Your Library:

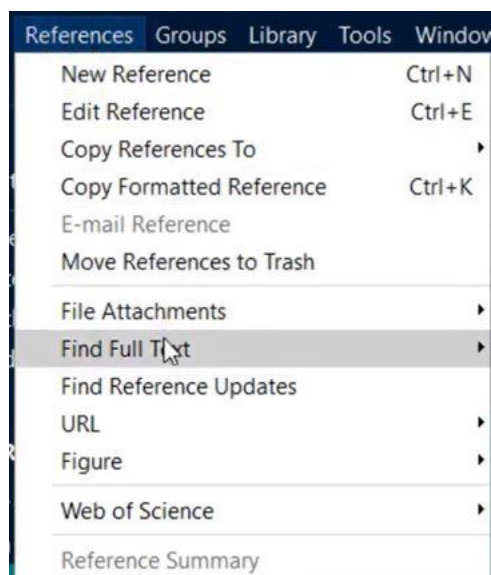
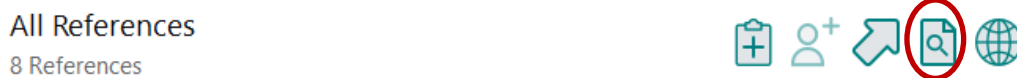
- The quickest way to sort a library is to click on the headings at the top of your EndNote library eg. **Author, Title, Year, Record number**.



USING FIND FULL TEXT:

This works best via a UQ computer or via VPN.




- Select the reference(s) you want to search.
- Click on the **Find Full Text** icon in the toolbar or **References > Find Full Text > Find Full Text**.



- It will start searching for full article.

Viewing Full Text Results:

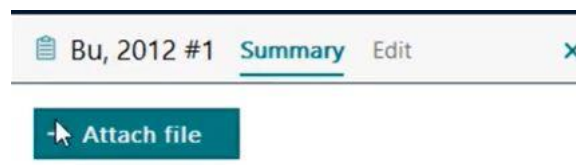
- Once EndNote has finished searching, the results will be displayed in the **Find Full Text** group.
- It will display what it did and didn't locate. You can then view the references in each of these groups.

▼ FIND FULL TEXT	
 Searching...	18
 Found PDF	3
 Found URL	3
 Not found	1

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

ADDING A FILE ATTACHMENT:

1. Highlight the reference. Click on the **Attach File** button in the **Summary** view at the top of the reference on the right.



2. Select the PDF or file to attach and click on **Open**.
3. The PDF will appear as a button at the top.

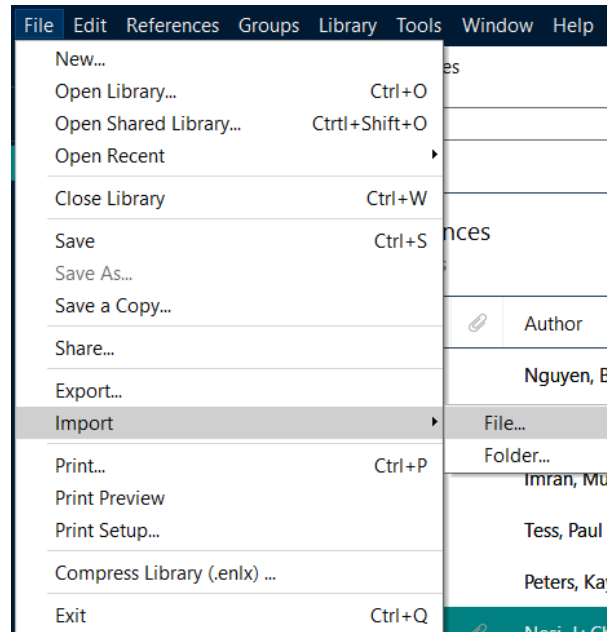


5. You can attach different format eg. images and also add multiple attachments.

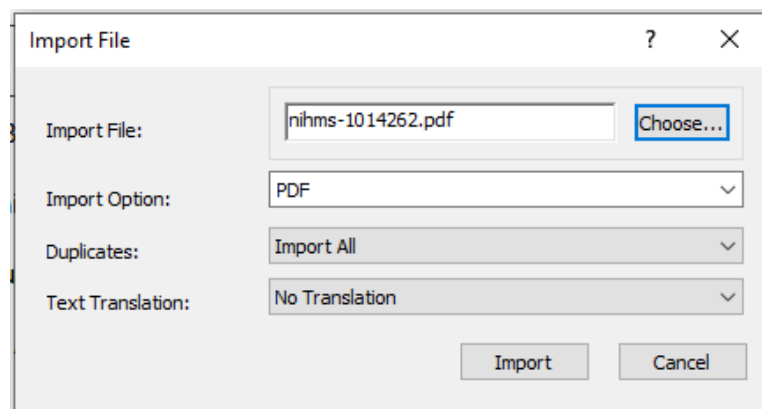
IMPORTING A PDF:

PLEASE NOTE THIS WILL NOT WORK WITH ALL PDFs.

1. You can import saved PDFs into your 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**. You can also import a folder of multiple PDFs.



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

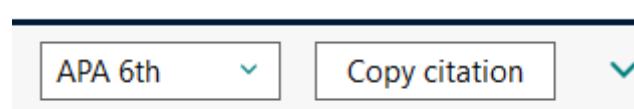


7. Save the reference.

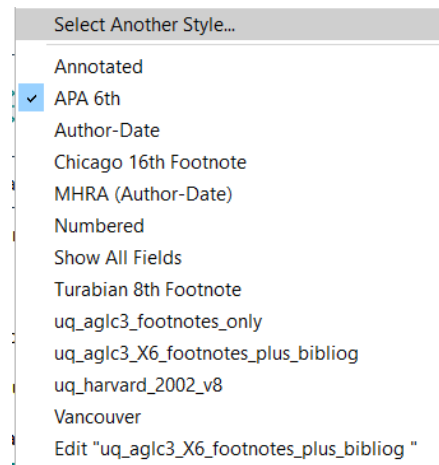
SELECTING THE OUTPUT (REFERENCING) STYLE:

In EndNote:

1. In the reference summary on the right, the current style is listed at the end of the first box. Make sure **Summary** is selected.

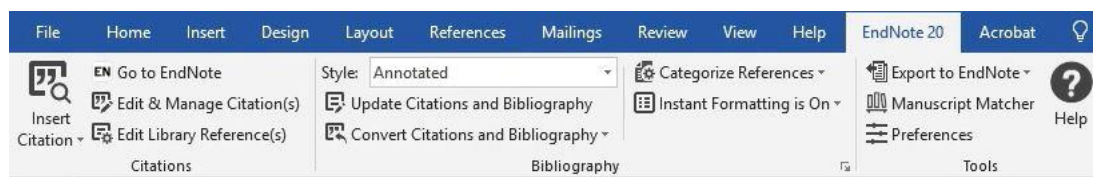


2. Select your style from the menu. Click on **Select Another Style** for additional options.



In Word:

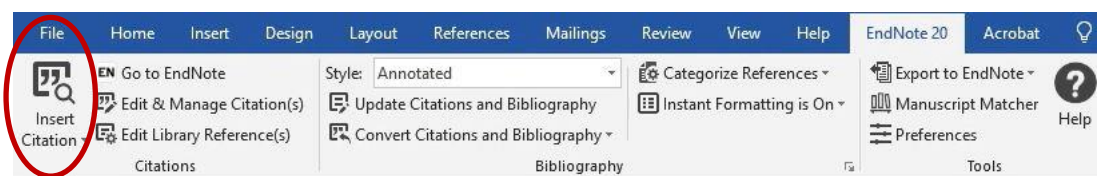
1. Always check the style in the Word EndNote 20 toolbar.
2. If the style listed is not the one you require, select your style from the menu. Click on **Select Another Style** for additional options.



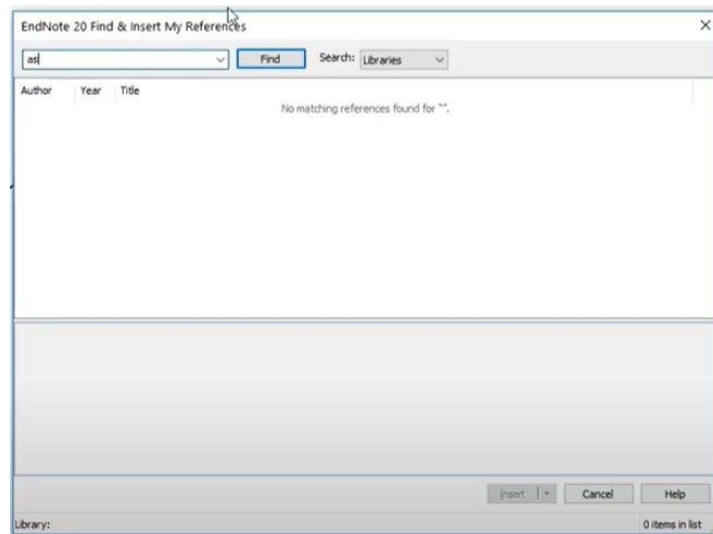
CREATING A REFERENCE LIST USING IN-TEXT CITATIONS:

Insert Citation Option:

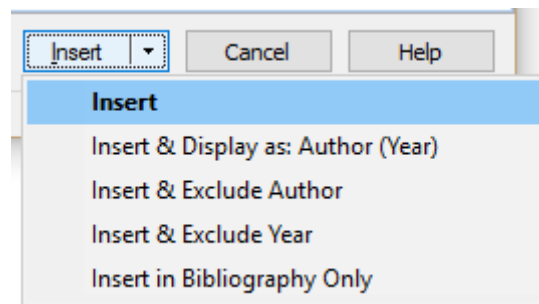
1. Make sure the referencing style you want is displayed in the **Style** box.
2. Place your cursor where you want the in-text citation to appear in your **Word** document.
3. Click on **Insert Citation** in the EndNote 20 tools.



4. Search for the reference you want to use. If more than one match is found, select the one you need.

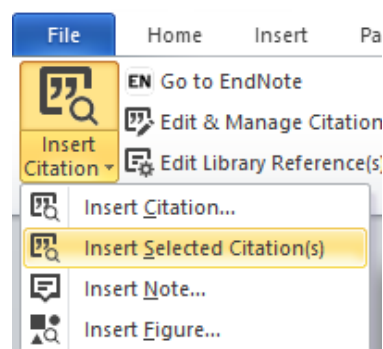


- Click on **Insert**. Additional options are also available from the drop down menu.



Insert Selected Citation:

- 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).
- Switch back into **Word**. Go to the EndNote 20 toolbar.
- Check that the correct referencing style is displayed in the **Style** box.
- Put your cursor where you want the in-text citation to appear in your **Word** document.
- In the **EndNote 20** 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.

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.

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

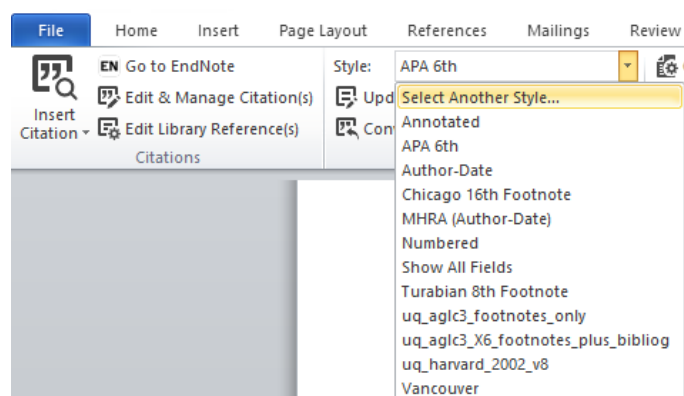
Dickey, F. 2001, *Last Minute Meetings*, Career Press, Franklin Lakes, NJ.

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

- Repeat these steps for each of the references you want to include.
- 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.)

CHANGING THE STYLE OF YOUR REFERENCE LIST:

- You need to be in the **Word** document you want to change.
- Click on the **EndNote 20** 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.



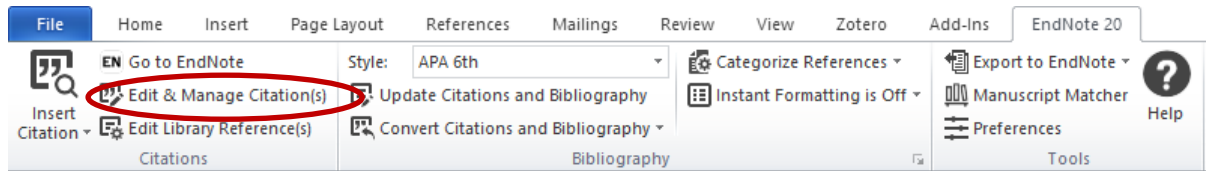
- This will not work as well with footnote styles. Please see your librarian for assistance.

ADDING PAGE NUMBERS:

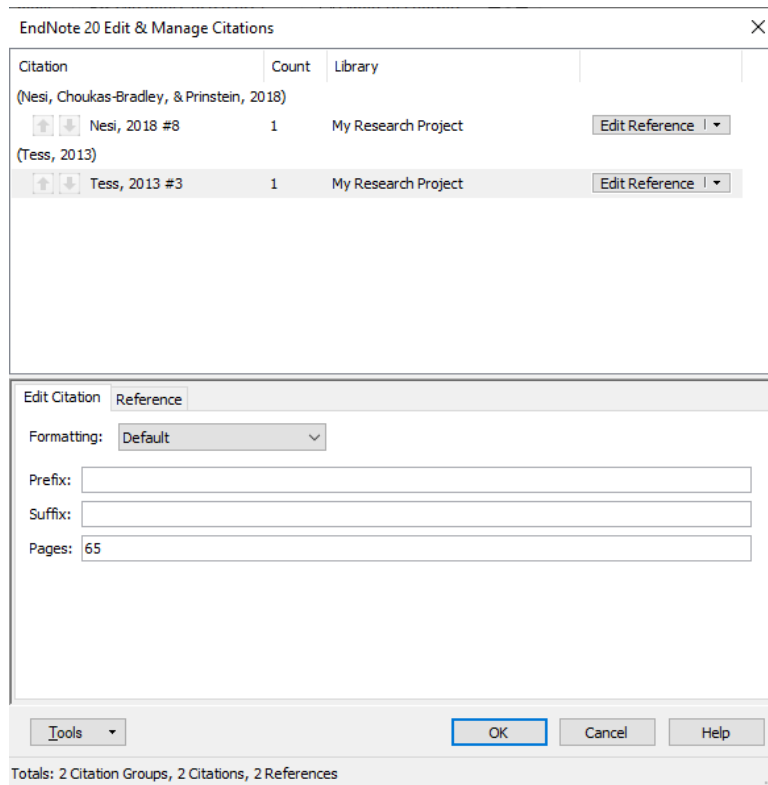
1. Click on the in-text citation once so a grey highlight appears.

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

2. Click on the **EndNote 20** 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.



Citation	Count	Library
(Nesi, Choukas-Bradley, & Prinstein, 2018)		
Nesi, 2018 #8	1	My Research Project
(Tess, 2013)		
Tess, 2013 #3	1	My Research Project

Edit Citation	Reference
Formatting: Default	
Prefix:	
Suffix:	
Pages: 65	

Tools: [OK] [Cancel] [Help]

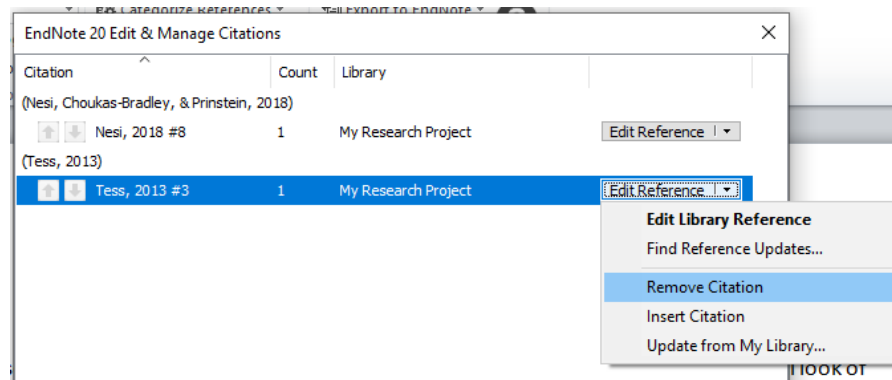
Totals: 2 Citation Groups, 2 Citations, 2 References

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.

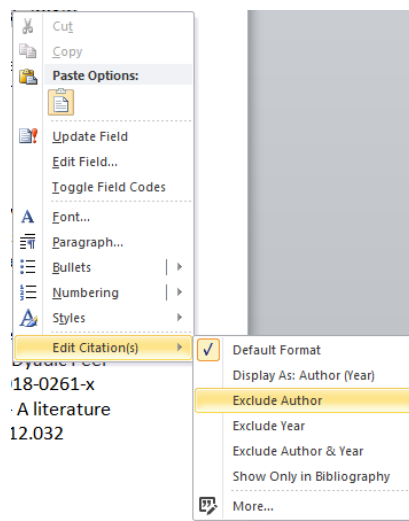
- Click on the **Edit & Manage Citation(s)** icon in the toolbar.
- Make sure the citation you want to remove is highlighted in the top window. Click on the down arrow beside **Edit Reference**. Click on **Remove Citation** and then **OK**.



- The in-text citation will now be removed.
- 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:

- Occasionally, you may only want the year information to appear in an in-text citation eg: Cunningham et al. (2017) states.....
- 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.

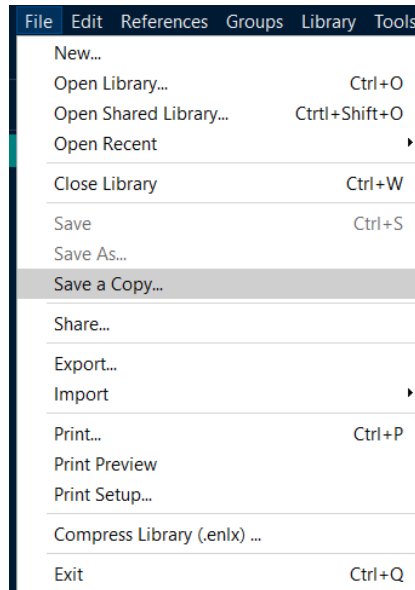


- Only the year will now appear in the in-text citation eg. Cunningham et. al. (2017) argue that.....

SAVING A COPY OF YOUR LIBRARY

- When you save a new library, two files are created – a .enl and a .DATA. These two files need to stay together so your library will full function. 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**.

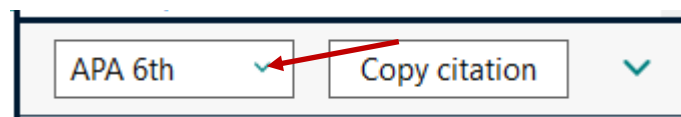


2. Give your copied library a name or accept the default. Choose where to save it.

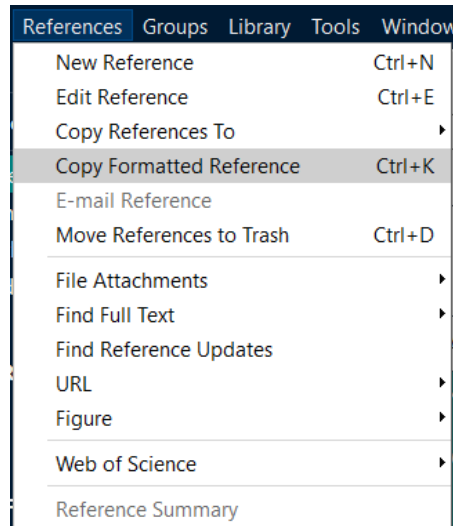
NOTE: The **Save a Copy** command creates a **copy** of your library and keeps your original one. You can either give it a new name or accept the default, which is the name of your original library file with Copy at the end eg. My EndNote Library Copy.

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 style box on the right.



2. Highlight all the references you want included in your bibliography. (**Ctrl +A** to highlight all).
3. Click **References** and select **Copy Formatted Reference**.

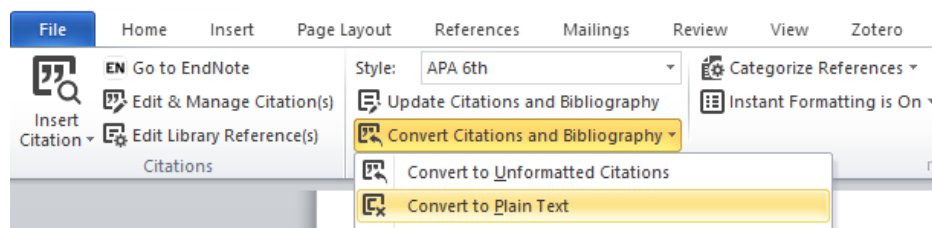


4. Open **Word** and paste the bibliography. The bibliography is created in the style you chose in **EndNote**.

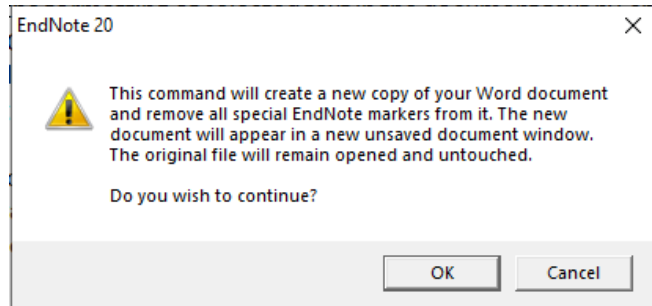
NOTE: Your style must be selected in the EndNote program. The style cannot be changed when you are in Word. If you want to change the bibliographic style, you have go back into EndNote and select a different style. Repeat the above steps.

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**.



3. Save the new document created with a different name eg. thesis_final_plain
4. 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, it is not connected to EndNote.
5. This is the document you submit. (If the reference list is highlighted in grey, it is still connected to EndNote.)