

EndNote 20 Guide - PC

Contents

What is EndNote?	2
How can I access it?	2
Creating a new EndNote Library	3
The EndNote 20 Home Screen	3
Sync your EndNote Library.....	4
Adding References to your EndNote Library	6
a) Manually input your references.....	6
b) Direct Export	6
Deleting a Reference in your EndNote Library	14
Edit or View a Reference in your EndNote Library	15
Select a Citation Style	15
Abbreviated Journal Titles and Term Lists.....	17
Finding Full Text	19
Viewing and Annotating PDFs.....	21
Sorting your References.....	21
Changing the Display Font of your References	22
Searching your EndNote Library	22
Removing duplicate EndNote References	23
Organising your References.....	23
Using your References in Documents (Cite While You Write).....	25
Inserting References	26
Option 1: Insert a Reference(s) from your EndNote Library.....	26
Option 2: Insert a Reference(s) into your Word Document	26
Formatting your Bibliography in Word	27
Unformatting Citations	28
Editing References and Citations within your Word document	28
Separating your Word Document from EndNote	29
Creating an Independent Bibliography in EndNote	30
Emailing your EndNote 20 Library (plus your PDFs)	30
Sharing or Merging Group EndNote Libraries.....	31
a) Sharing your EndNote Library	31
b) Merging EndNote Group Libraries	33
Merging small Word documents	33
Additional EndNote support	34

What is EndNote?

EndNote is a software program that allows you to create a personal “Library” of the references you are using for one or more papers/projects. You can select references from your library, insert them into the text of your Word document, and automatically create and format your bibliography list in the style of your choosing (this is called “Cite While You Write”).

How can I access it?

Use EndNote on the Student Desktop, or it’s free for students on your own computer:

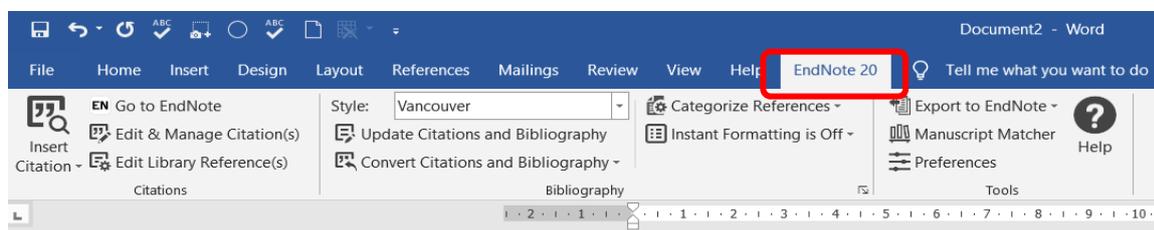
[Student EndNote Application form](#). Choose **EndNote 20.1** from Otago’s supplied link.

1. All current students, once fully enrolled, have access to the Student Desktop. As well as accessing the Student Desktop from the computer labs, you can also run it from your own personal laptop by visiting <https://www.otago.ac.nz/studentdesktop>
2. When you first go to this link you will be asked to install a piece of software called **Citrix Receiver**, which should only take a few seconds.
(**Note:** For more information on installing the Citrix Receiver go to the Student Desktop help page <https://blogs.otago.ac.nz/studentit/student-desktop/>)
3. Once installed, you will be asked to authenticate with your username and password (make sure it’s your student username) and you should see a PC screen similar to this:



Note: if you use EndNote on the Student Desktop, you will also need to complete any documents that link to EndNote, on the Student Desktop as well. (You won’t be able to use a word processor on your own computer’s hard drive and link it to EndNote on the Desktop – the two won’t ‘find’ each other as they exist in two different places.)

Word on the Student Desktop will have the EndNote 20 ribbon from Semester 2, 2021:



Creating a new EndNote Library

1. Open EndNote by going to **Start > EndNote** 
2. When you first start EndNote you are invited to Sync your new EndNote desktop library with your EndNote Online library. Ignore and close this invitation if you just want to use EndNote on **one** computer. You can Sync your Library later if you change your mind (see page 4).
3. EndNote advises to NEVER keep your EndNote Library files in cloud server spaces, e.g. **OneDrive**, DropBox, Syncplicity, as they may become corrupted.
4. Select **File > New** then **Name** your new Library:
 - a. Create a home folder on your local hard drive, i.e. C:\Users\username (where username is, e.g. Samantha), to save your EndNote Library to
 - b. Name the new folder **Endnote**
 - c. Click **Save**, and it saves both the Endnote Library **.enl** file and Endnote Library **.Data** folder to that home folder.

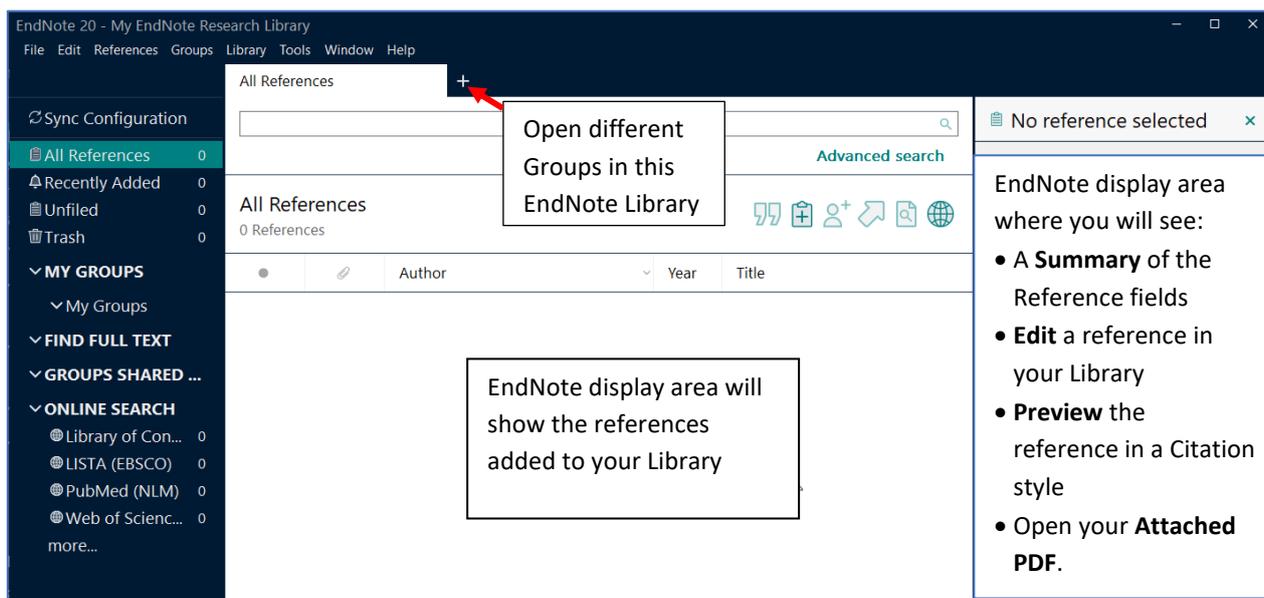
Note:

It is recommended to have only **ONE** EndNote Library. You can create groups to organise your references by topic/project, within your Library.

To open an existing EndNote Library:

1. Open the EndNote program and select **File > Open Recent**. EndNote will automatically open the last library you had open, depending on your settings. OR, find and select the **.enl file** on your computer.

The EndNote 20 Home Screen



Sync your EndNote Library

If you use multiple computers, Sync benefits include:

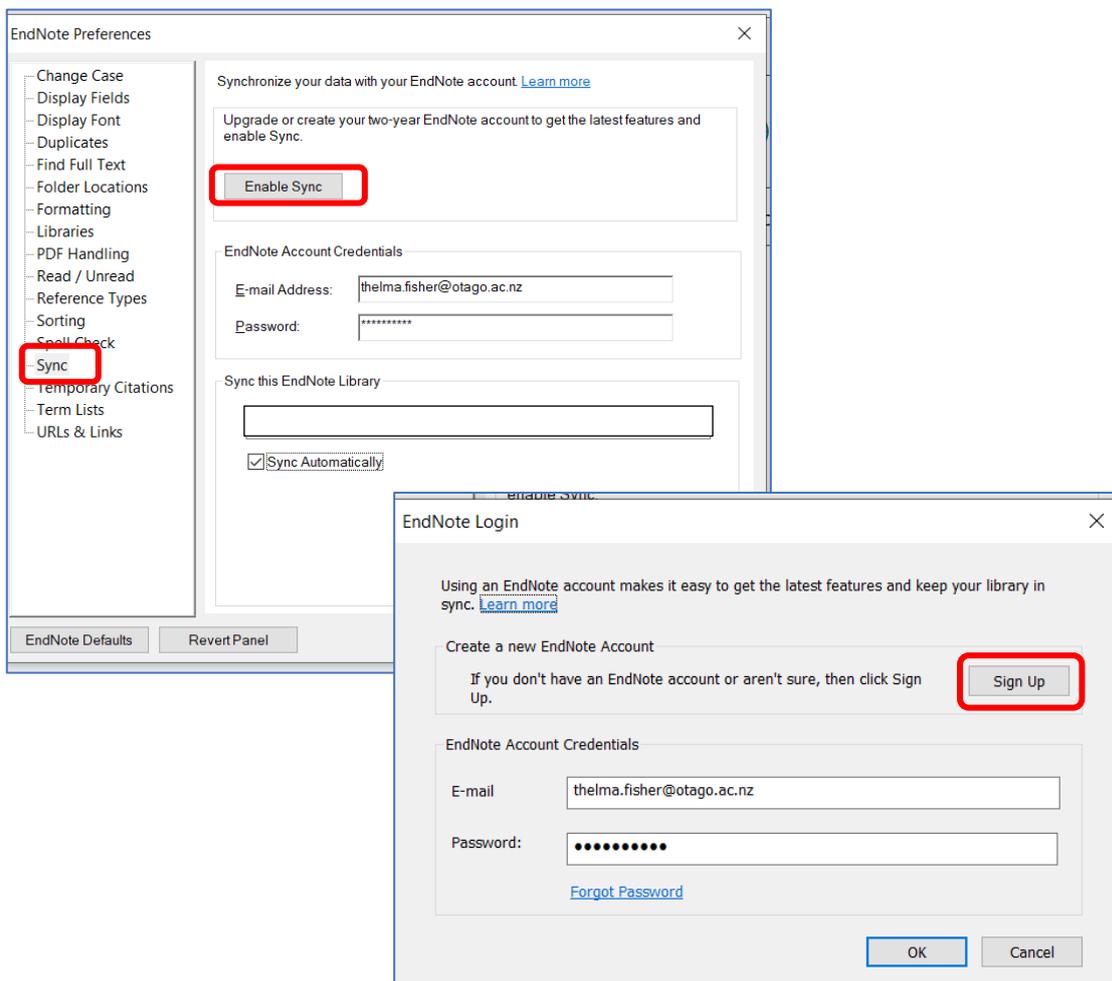
- Your EndNote Online Library serves as a back-up copy
- Access your EndNote Online library anywhere you have internet access
- Access your one EndNote Library across up to 3 computers

To enable Sync

Only **one** EndNote Library can be used, so use Groups to organise your references.

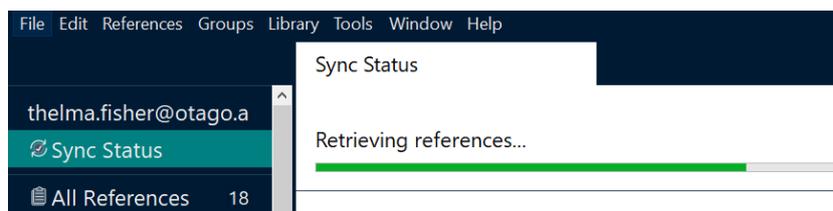
View: <https://www.youtube.com/watch?v=5k7oCB6tpyg> or follow these steps:

1. Make a back-up copy of your EndNote Library (File>Compress Library .enlx file). NB Cloud storage such as Dropbox, iCloud or Google Drive should **not** be used for the location of your main library. Use the cloud only to store compressed libraries as back-ups.
2. If you are unsure you already have an EndNote Online account, check at <https://myendnoteweb.com> and enter your email and password. If you already have an EndNote Online library it is recommended you start with an empty Online Library - delete the online references and group names, unless they are unique to your desktop Library, as they will merge contents on Syncing.
3. To get an EndNote Online account:
 - a. Open EndNote > **Edit > Preferences > Sync**;
 - b. Click **Enable Sync** and **Sign Up** for an EndNote Online Library.



- c. Follow the next 3 EndNote registration windows.... Submit email address ... I agree... Done
 - d. Click OK at the EndNote Login window.
 - e. Decide whether to **Sync automatically** – this will occur every 15 minutes, and when you open or close your EndNote Library; or you can Sync manually after making any changes.
 - f. Click OK to close the EndNote Preferences window.
4. Click **Library > Sync**. The first Sync may take some time if you have attachments, as it takes time to upload all your references. Large Libraries (1000's) may take overnight to complete the Sync process!

Watch the green status bar for progress, and Groups populating.



5. Optional: Refresh the screen in your Online Library and you will see your growing list of references!

Any future changes you make will be made in your laptop and online EndNote Libraries.

Note:

1. Group Set headings and Smart Groups do not Sync with your EndNote Online Library, but your Groups do!
Tip: Rename your Groups with a prefix related to the Group Set heading, so they sort easily.
2. **If you delete references in EndNote Online or EndNote on the laptop, those references will be deleted in both!! If you delete a reference in an EndNote Online Group it deletes across laptop and online libraries!! However, in EndNote on your laptop library, deleting a reference from a Group does not delete it from the desktop All References list.**

To sync to another computer you need to:

1. Open a new **empty** library on the 2nd computer, then give it the same name as for your (main) computer's EndNote Library.
2. Go to **Library > Sync** and enter your EndNote Online account details. Watch the Sync status bar for progress.
3. Even though **Group Sets** don't show in your Online Library, they will sync from the Library on your 1st computer to the 2nd computer.

Note: Do not use an existing library on your 2nd computer – you want an empty library that will be filled by the references from your Online Library. You can Sync your Library on up to 3 devices.

View: <https://www.youtube.com/watch?v=4NxAuQpdTNg>

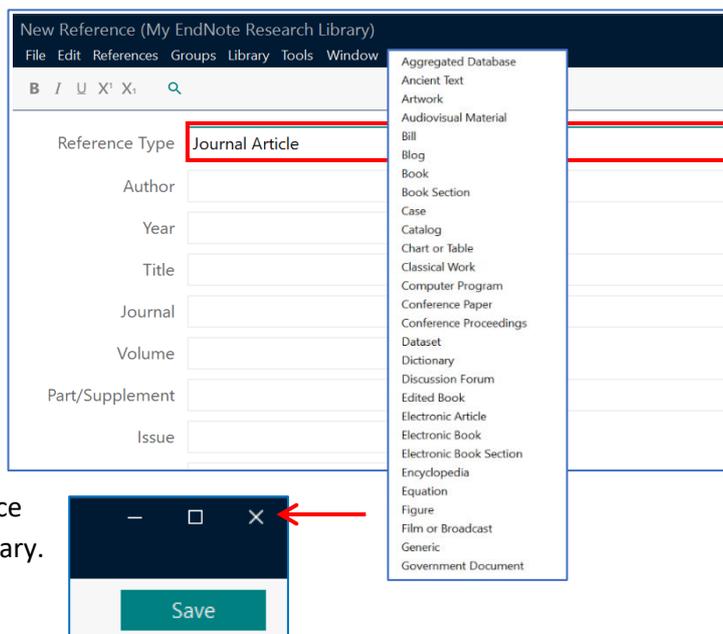
Adding References to your EndNote Library

There are several ways to add references to your EndNote Library. Manual input and Direct Export are the two most common (and easiest).

a) Manually input your references

Not every item that you will want to cite will be available in a database (e.g., personal interviews, memos, websites, etc.). For these types of sources you will need to manually enter a record into your EndNote Library:

1. Click on the **New Reference** icon on the toolbar.  Alternatively, you can select New Reference from the References menu.
2. Now select the **Reference Type** you want to use from the pull-down menu.
3. Fill in the fields for which you have information.
55 different Reference Types to choose from!!!
4. Click **Save**. The newly added Reference will now display in your EndNote Library. Then click **X** to close this window.
5. Double-click the reference to view the full record again, now in a panel to the right. **Edit** any field simply by modifying the contents.



TIPS: The most common mistakes when manually creating a reference occur in the Author field. Always preview your reference after saving, and if it is incorrect check the following:

- a. Have you added each extra author on a new line?
- b. Have you added a comma after a government or organisational author, or after a surname that consists of more than one word? e.g. Ministry of Education, or John Van de Meer. Commas instruct EndNote to keep the words together as one surname.
- c. EndNote by default recognises a First name followed by a Surname so you do not need to use a comma. However, if you put a Surname first followed by a First name you must use a comma between, e.g. Smith, Jane

b) Direct Export

Whenever possible Direct Export references into your Library from a database. This is the easiest way to simultaneously add multiple references to your Library.

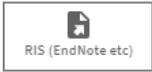
Note: For best results use the Firefox or Chrome browsers when exporting to EndNote.

If you need to bulk export records from a database, [check these steps first](#).

Library Search | Ketu using Direct Export



1. Perform your search in Library Search .
2. Click the  'Send to' button to the right of the item you want to export to EndNote.

3. Select  then **Download**. Choose **Open with EndNote 20**.

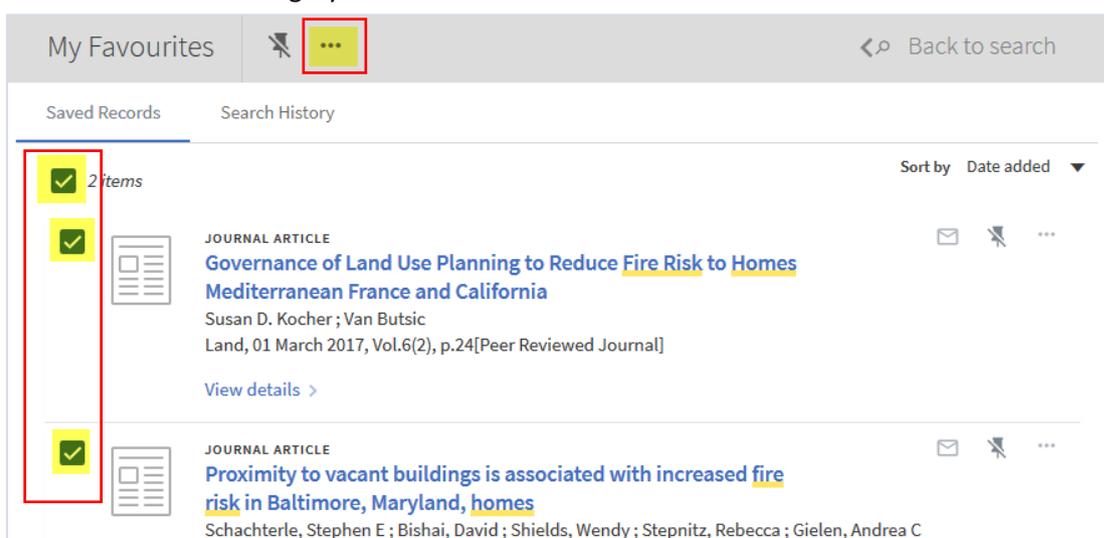
Click **Save**. The record will now open in your EndNote Library.

4. If you want to save many items click the pin beside each item. This keeps the item, temporarily saved to your Favourites, for the duration of your search session.



If you are already Signed in your Favourites will be kept permanently for you.

5. Click on the pin (top right) = **My Favourites**, to open the list of your Saved items. Tick at the top to select all, or tick in the box beside each item you want to bulk export to EndNote. Click the  'Send to' button on the grey bar.

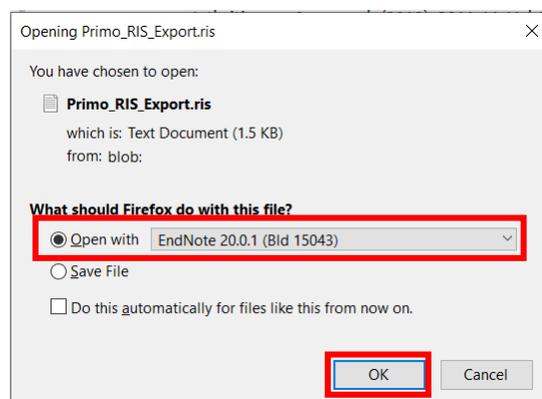


6. Select  then **Download**.

If using Firefox:

Choose **Open with EndNote 20**. Ensure the **Open with** is set for your version of EndNote. Click **OK**

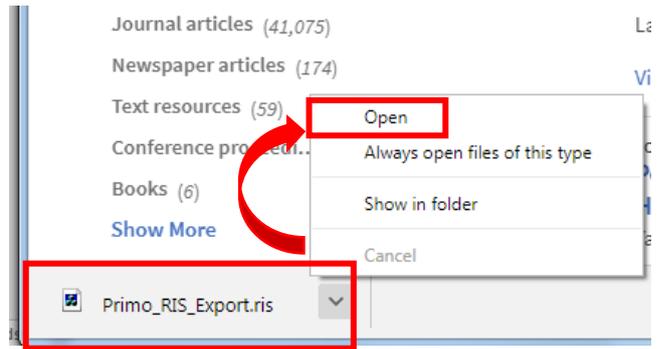
Tip: If your EndNote version is not present choose **Open with Other**, choose EndNote then it will be the default from now on for you.



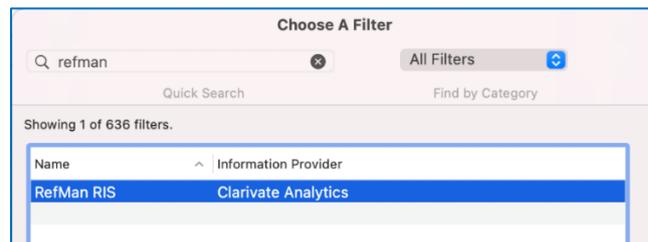
If using Google Chrome:

When you click **Download** a temporary file named **Primo_RIS_Export.ris** appears in the bottom left corner of the Chrome window. Double click this **.ris file**, **OR** click the **^** then choose **Open**.

You should then see the selected references listed in your EndNote Library.



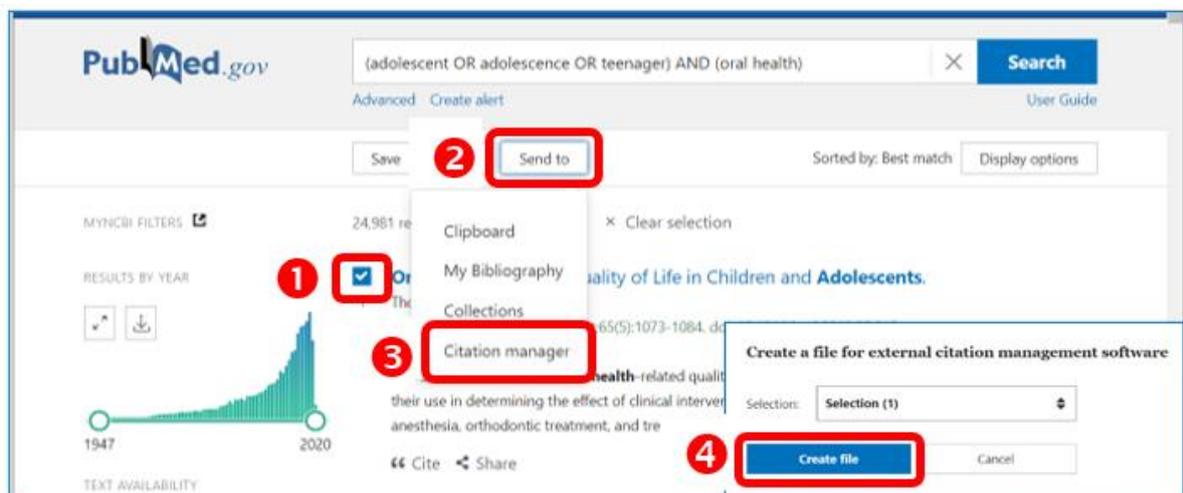
Note: If you are prompted to Choose An Import Filter to enable the Library Search records to be loaded to your EndNote Library, search/scroll to **RefMan RIS** then click **Choose**. This happens infrequently, with some records from publishers that lack the metadata for EndNote to complete the Direct Export function.



PubMed using Direct Export

Perform your search in PubMed:

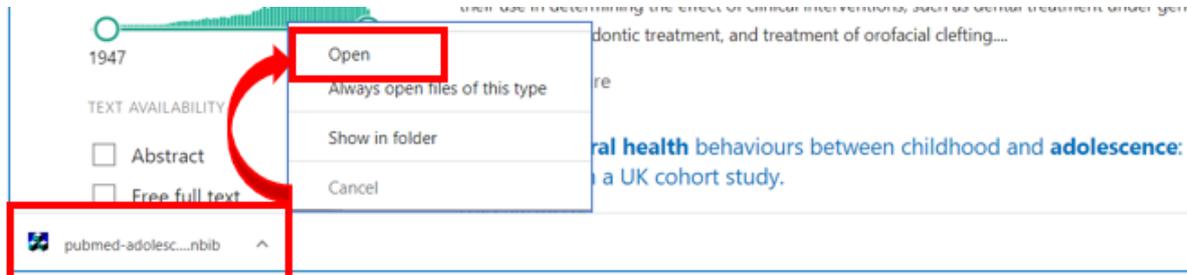
1. From your list of results, **tick the box next to each citation** you wish to save to your EndNote Library
2. Click the **Send to** button
3. From the drop-down list choose **Citation manager**
4. Click **Create file**



The next screen will vary depending on your browser and your settings.

In **Firefox** you are prompted to **Open with** the preset setting. Click **OK**. You should then see the selected references listed in your EndNote Library.

In **Google Chrome**, at the bottom left of your PubMed browser window, double click the temporary file name **pubmed-xxxx.nbib**, **OR** click the **^** then choose **Open**.

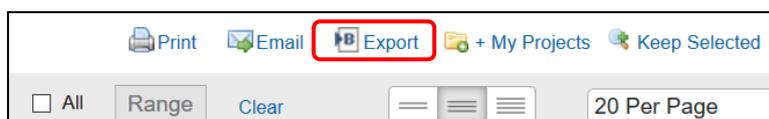


You should then see the selected references listed in your EndNote Library.

Medline using Direct Export

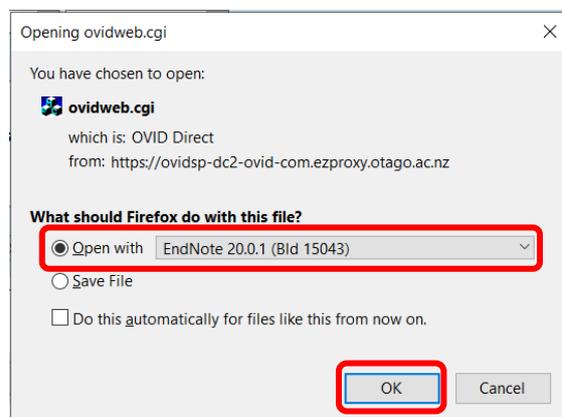
1. Go to the Library Homepage and click **Databases**
2. Select **Ovid** under Popular Databases (right-hand column), then choose Ovid MEDLINE®
3. Carry out a **Medline** Search
4. Select your references – tick beside each article you want in your EndNote Library

5. Go to the Results toolbar and click **Export**



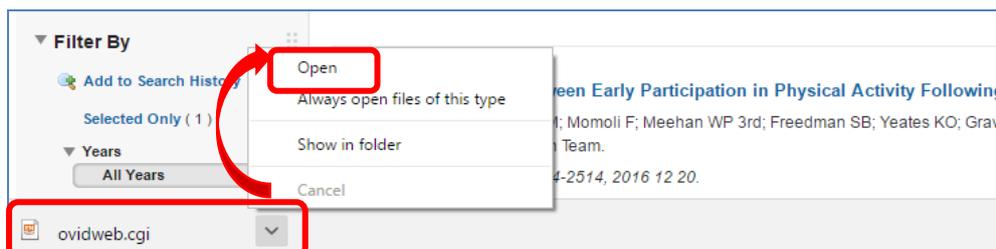
6. Set the Format to **EndNote**, and fields to **Complete Reference**, Include **URL**, then click **Export**

In **Firefox** your references will either be sent directly to your EndNote Library, or you may see this box. If so click **OK**.



Your records should now be visible in your EndNote Library.

In **Google Chrome** at the bottom left of your OVID Medline browser window, double click the temporary file name **ovidweb.cgi**, OR click the ^ then choose **Open**.



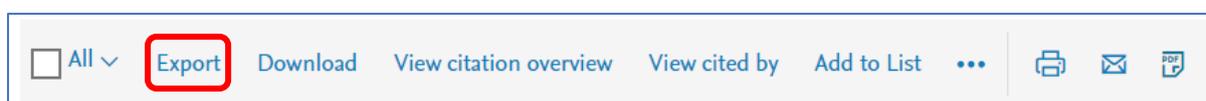
You should then see the selected references listed in your EndNote Library.

Scopus using Direct Export

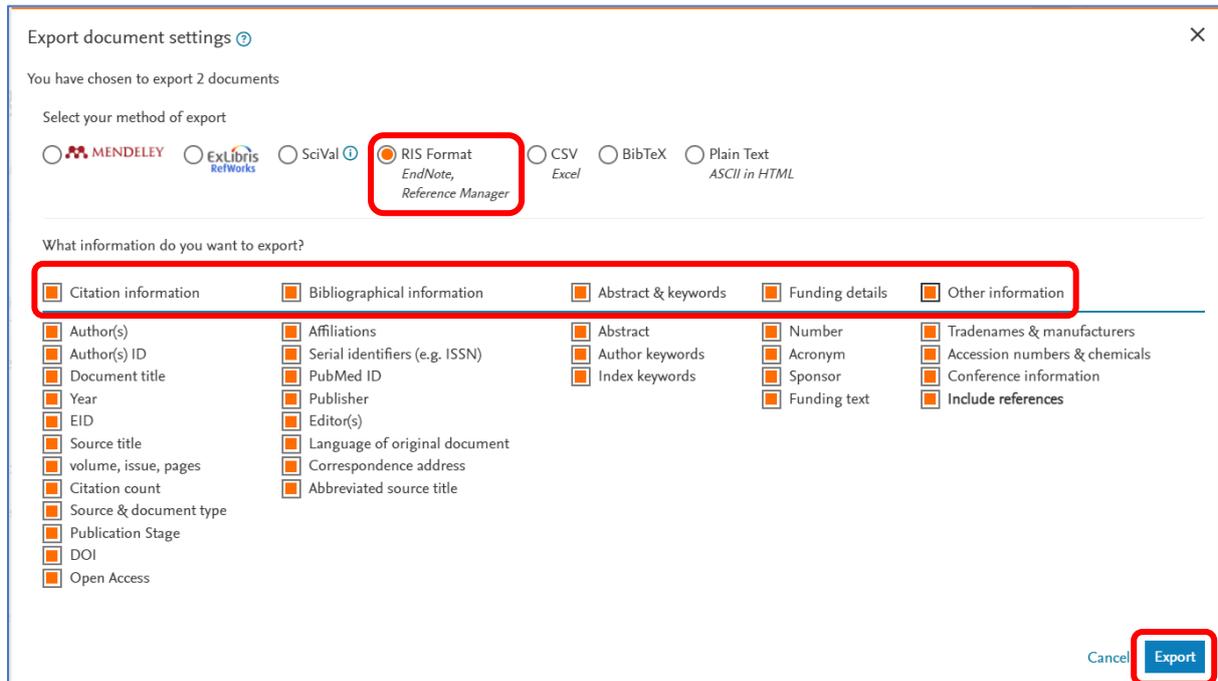
1. Go to the Library Homepage and click **Databases**.
2. Select **Scopus** under Popular Databases (right-hand column)
3. Carry out a **Scopus** Search
4. Select your references – tick beside each article you want in your EndNote Library

Document title	Authors	Year	Source	Cited by
The emerging role of flavonoid-rich cocoa and chocolate in cardiovascular health and disease	Engler, M.B., Engler, M.M.	2006	Nutrition Reviews 64(3), pp. 109-118	126
Cocoa and health: A decade of research	Cooper, K.A., Donovan, J.L., Waterhouse, A.I., Williamson, G.	2008	British Journal of Nutrition 99(1), pp. 1-11	211

5. Go to the Results toolbar and click **Export**

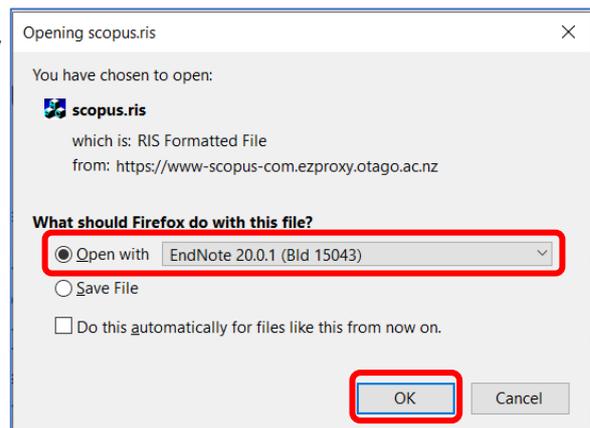


6. Choose **RIS Format** and which fields of information you need, then click **Export**

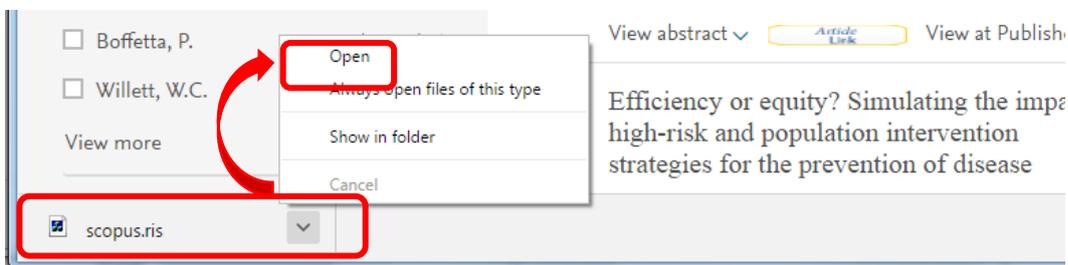


In **Firefox** your references will either be sent directly to your EndNote Library, or you may see this box. If so click **OK**.

Your records should now be visible in your EndNote Library.



In **Google Chrome** in the bottom left of your Scopus browser window, double click the temporary file name **scopus.ris**, **OR** click the ^ then choose **Open**.



You should then see the selected references listed in your EndNote Library.

Google Scholar using Direct Export

Note: Google Scholar only allows you to export one reference at a time; unless you have Signed In to your Google Account, Save each record to My Library, then bulk Export your records.

1. Click **Save** to send records to **My Library** in Google Scholar. Bulk export your selected My Library records using  to Export them to your EndNote Library.

The **Cite** function allows you to Export one record at a time to your EndNote Library.

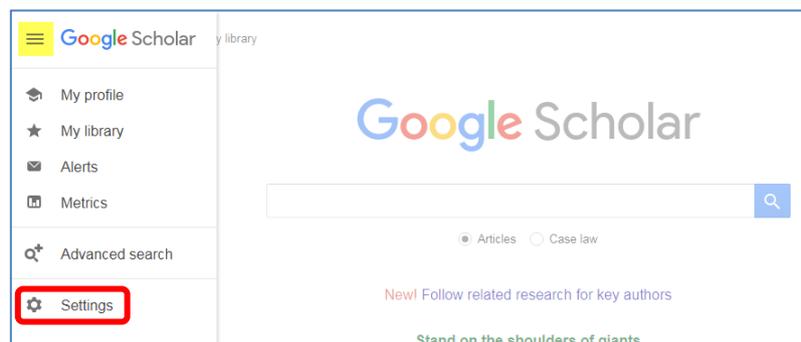


Save Cite (including export to EndNote)

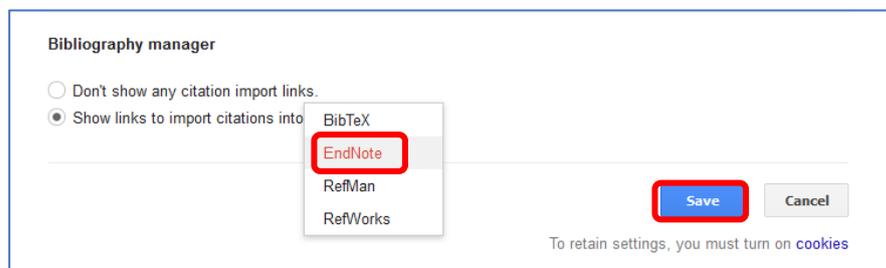
OR

1. Go to the Library Homepage and click **Google Scholar** (under the Library Search | Ketu box).
2. If you have not already done so, you can set a preference in Google Scholar (under Settings) to allow you to export citations to EndNote

3. Go to the top left of the page and click on the triple line, then **Settings**



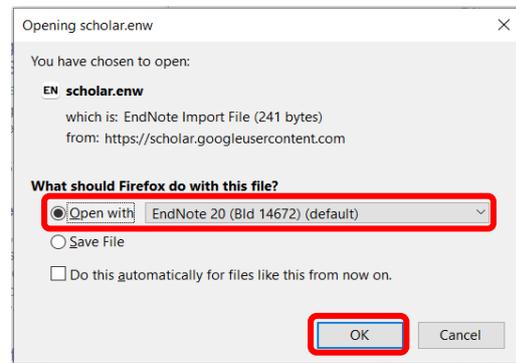
4. Scroll down to the bottom of the page. Next to **Bibliography Manager**, click on arrow beside **Show links to import citations into** and choose **EndNote** from the drop-down list. Click **Save**



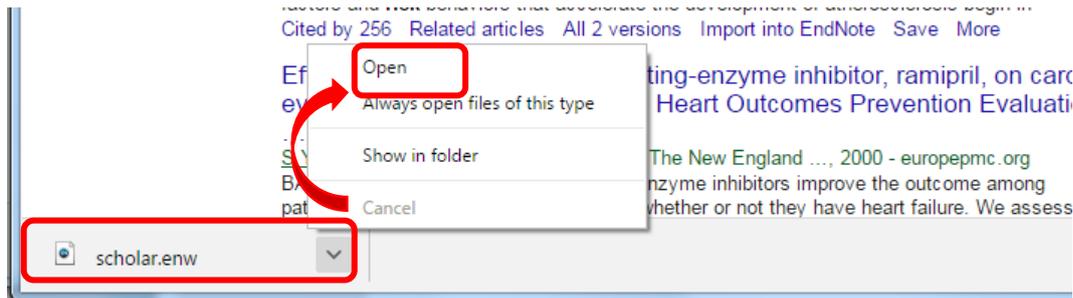
5. Perform your Google Scholar search. On your list of results click **Import into EndNote** underneath a citation you wish to add to your EndNote Library.

If using **Firefox** your references will either be sent directly to your EndNote Library, or you may see this box. If so, click **OK**.

Your records should now be visible in your EndNote Library.



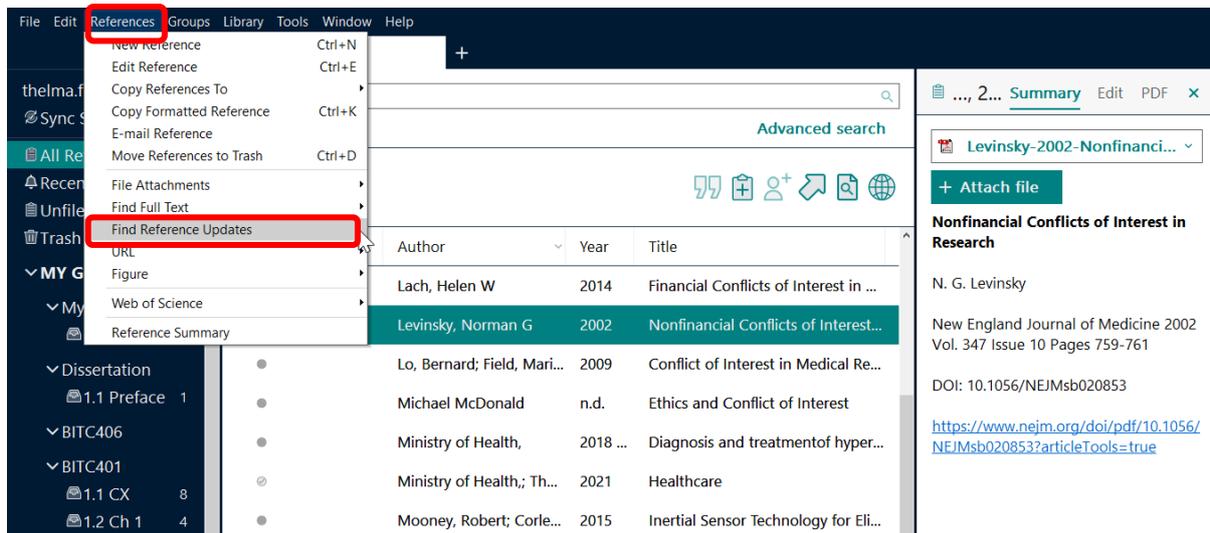
If using **Google Chrome**, in the bottom left of your Google Scholar browser window, double click the temporary file name **scholar.enw**, **OR** click the **^** then choose **Open**.



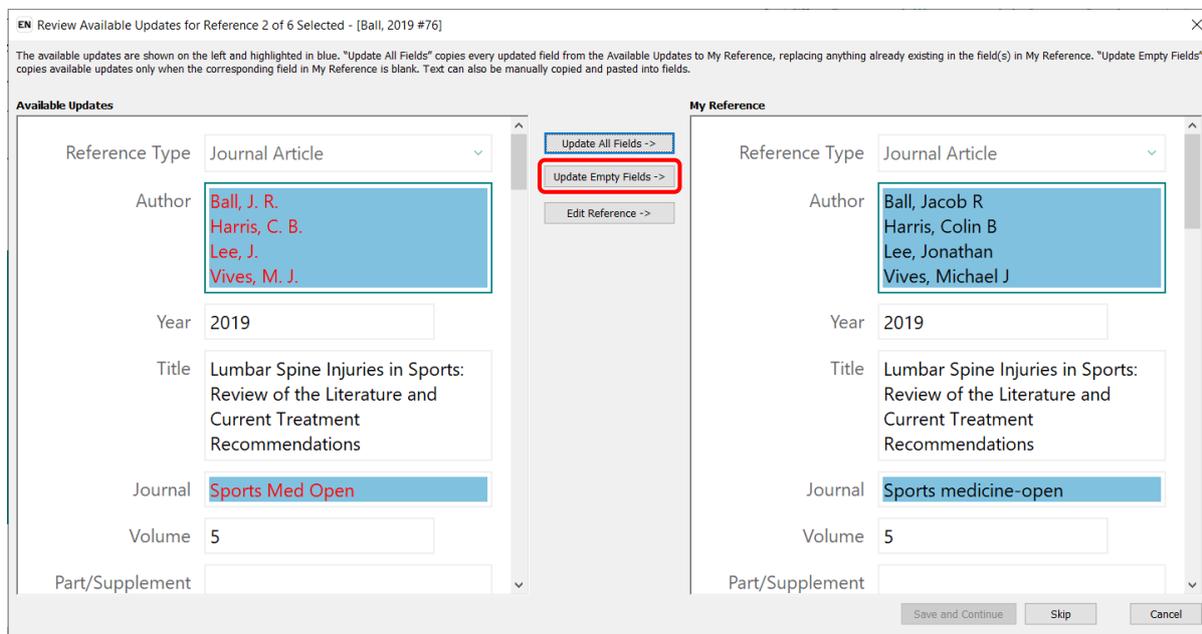
You should then see the selected references listed in your EndNote Library.

TIP:

Sometimes Google Scholar references lack key pieces of information, like volume, issue number, page numbers, DOI.... If you notice this problem highlight the reference and go to **References > Find Reference Updates**. EndNote will now search for additional information about the reference and let you know if any additional details are found.



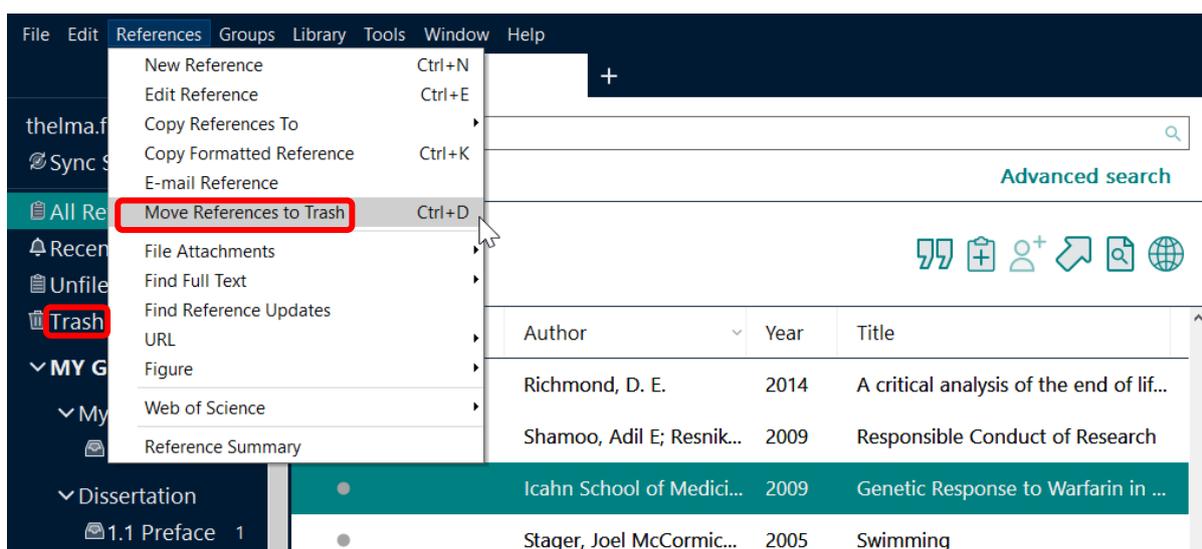
If EndNote finds additional details, you will see a screen like this. We recommend you click **Update Empty Fields** instead of Update All Fields (which could exclude existing data and your Notes!).



Deleting a Reference in your EndNote Library

To delete a reference from your EndNote Library either:

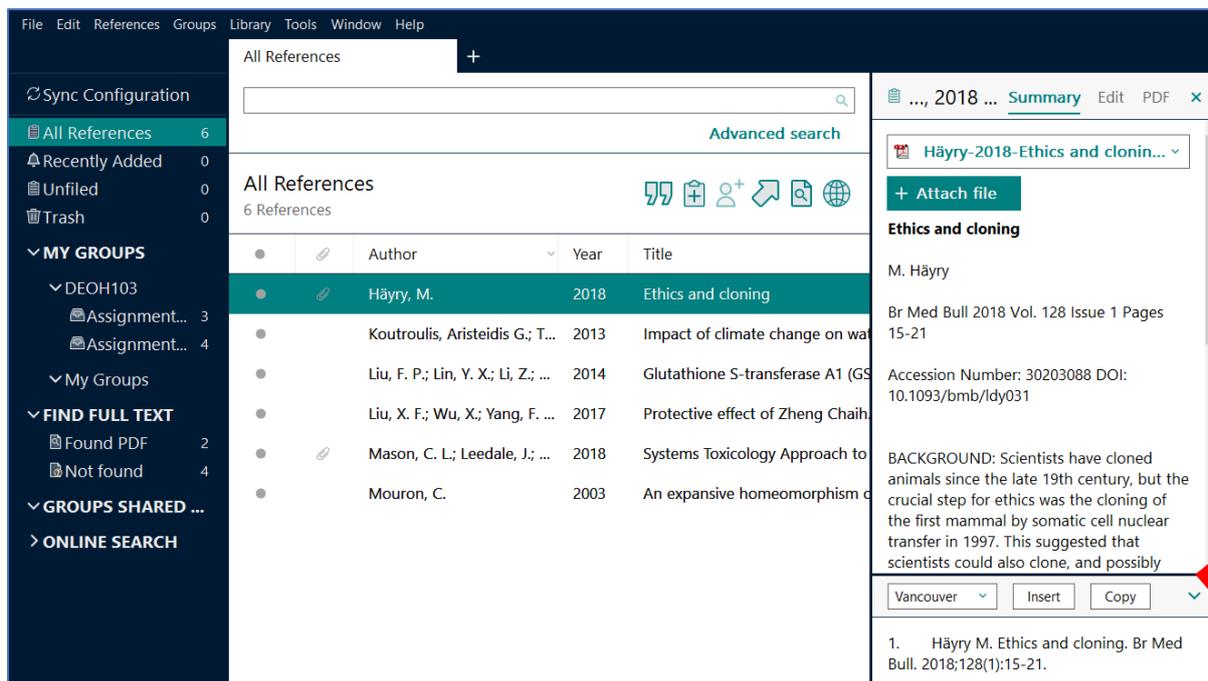
- Highlight the reference(s) to be removed and press **Delete**
- **OR** drag the highlit reference to EndNote's **Trash**
- **OR** highlight the reference(s) you want to delete, right click on the reference and select **Move References to Trash**, or select **Cut** or **Ctrl+D**



If you make a mistake go to the **Trash**, select the article, and drag it back to **All References** OR right click over it in the Trash then **Restore to Library**. 😊

Edit or View a Reference in your EndNote Library

To view or edit bibliographic information for a reference, **double-click the reference** to open the **Summary** panel to the right, which displays the full reference.

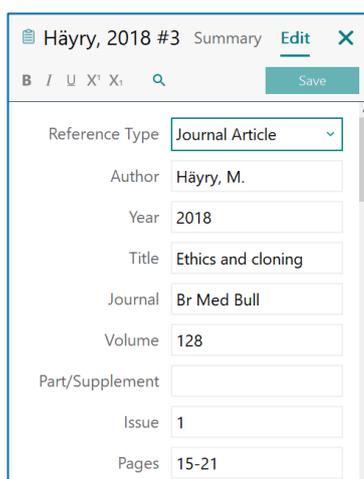


Click **Edit** to change a specific field,

e.g. Author

e.g. Sentence case in the Article Title

Click **Save** to keep the changes.



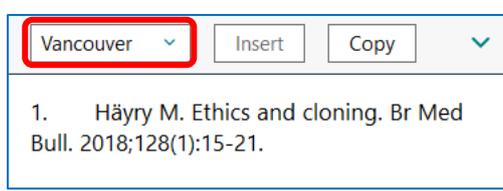
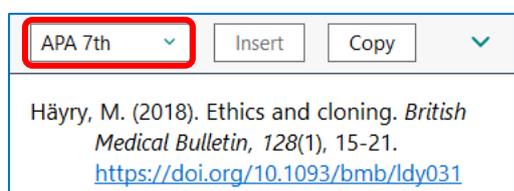
Raise this bar enough to **preview** all of the selected reference in your Citation style

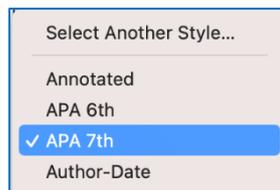
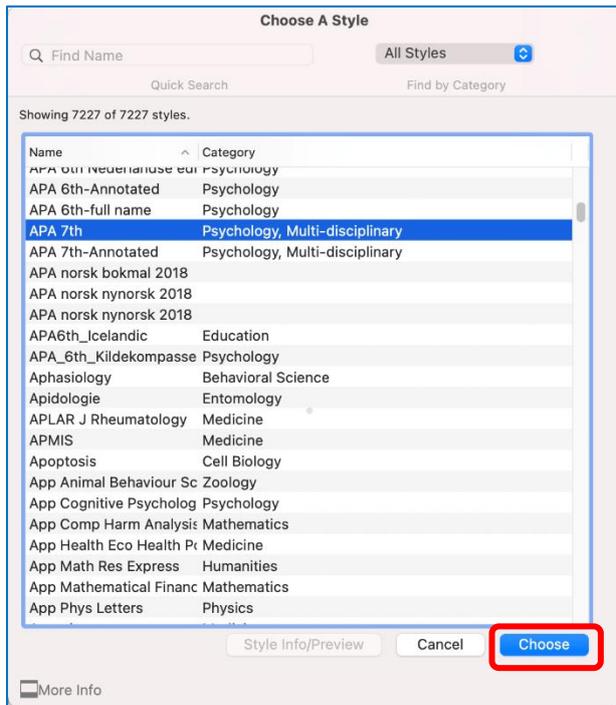
Select a Citation Style

Select a citation style from the pull-down menu located in the row of icons at the bottom of the Summary panel of your Library. For Health Sciences your citation style is usually **APA 7th** or **Vancouver**. For other papers please check with your lecturer/supervisor.

Preview your reference in your chosen Citation Style.

Is it correct? If not edit it in the right hand panel now – this will save you time later.





If the citation style you need is not available, choose **Select another style** from the top of the Styles drop down list. Scroll down or search until you find the new citation style. Select it then click **Choose**.

It will now appear as the chosen Citation style.

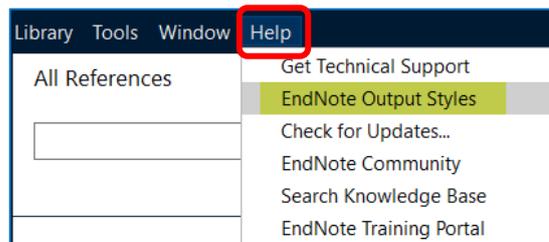
Change to a different style when required for another assignment or publication.

TIP: If the style you need is not listed in your **Choose a Style** window, go to

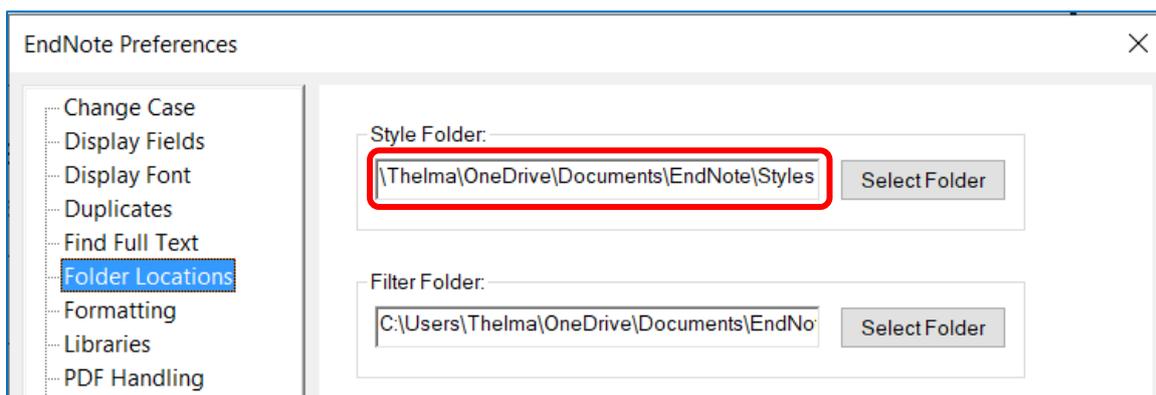
<https://endnote.com/downloads/styles/> and add the individual style, or update to the full list of over 7000 Styles.

OR, go to **EndNote 20 > Help > EndNote Output Styles**.

Search for the required Style then click Download.



If you have added or amended a citation style it will be stored in a specific folder location. To verify the (e.g. Style) folder location, click on the **Edit** menu and select **Preferences**. Click **Folder Locations** and note the path to this folder.

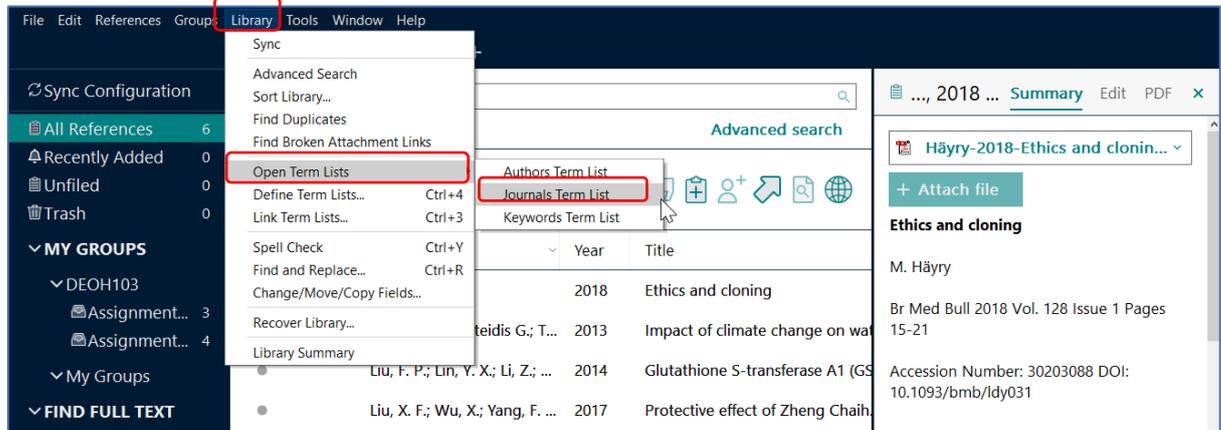


Abbreviated Journal Titles and Term Lists

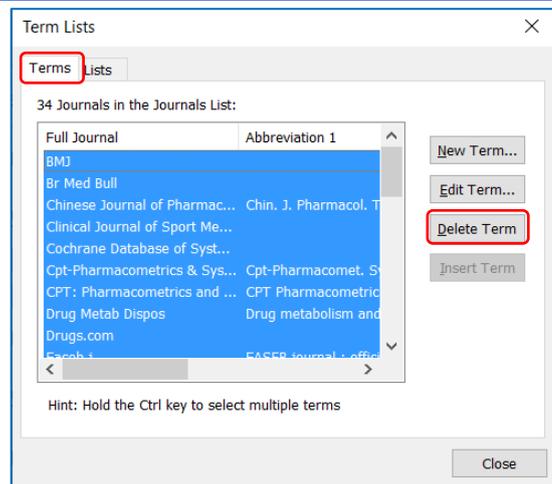
To show abbreviated journal titles in the bibliography (e.g. in Vancouver Style), you will need to set up a Journals Term List. EndNote will draw from this list to replace the full title with the abbreviated journal title. You will also need to select the correct Journal name format.

1. Terms Lists

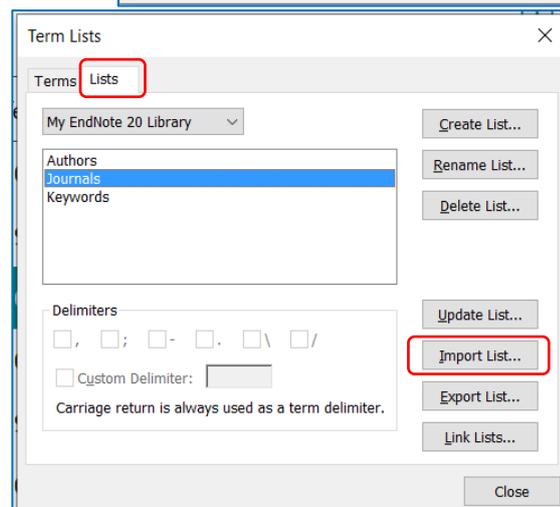
a) Go to **Library > Open Term Lists > Journals Term List**



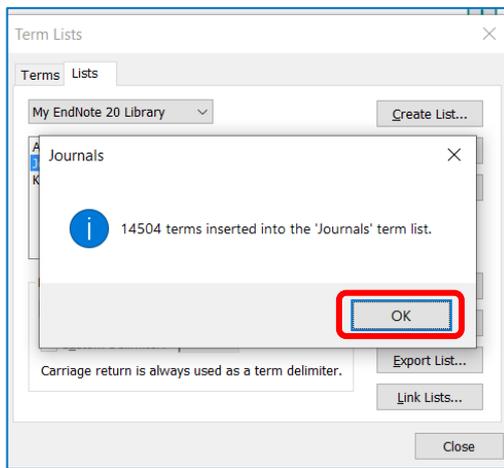
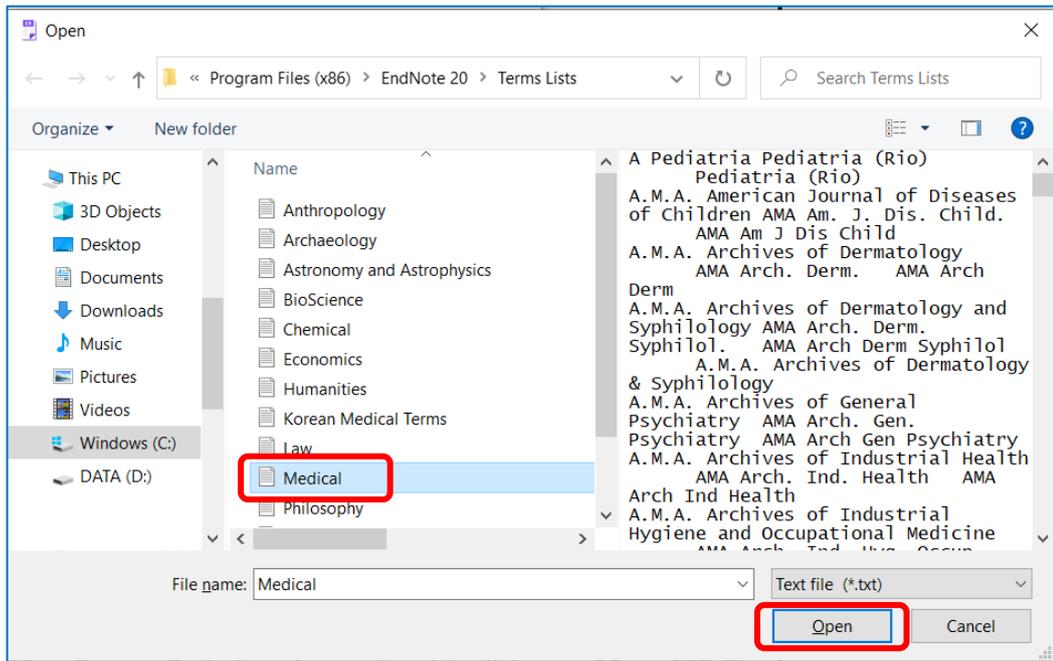
b) The Journals Term List may be empty.
(If so, go to step c). If not, highlight **ALL** of the current terms and click **Delete Term**.



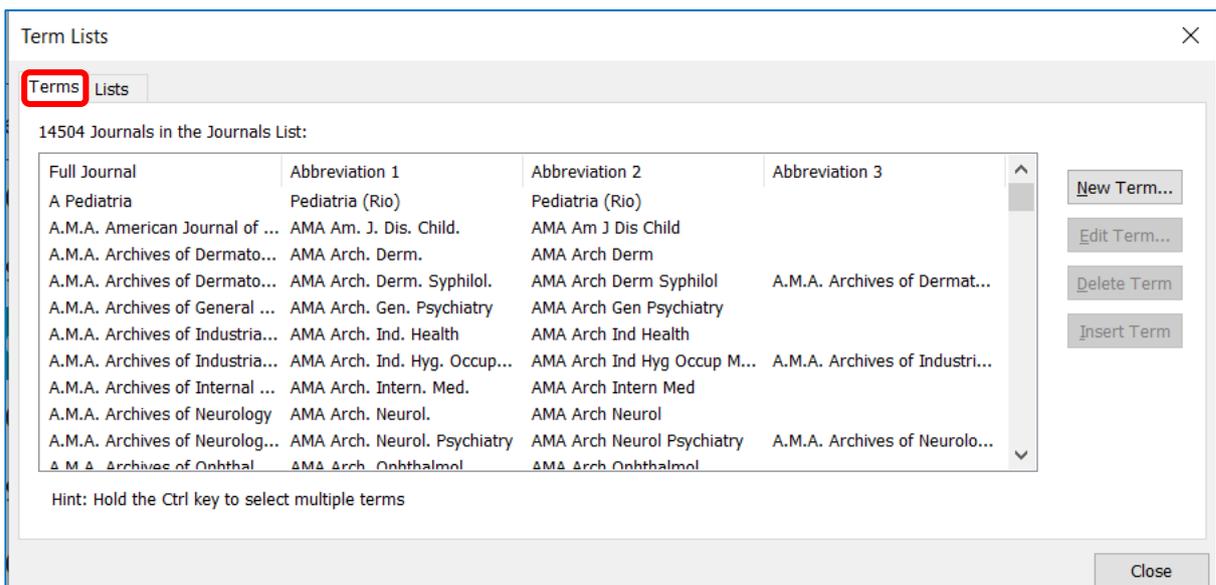
c) Now click on **Lists** then **Import List**



d) Choose a Terms list subject file, e.g. **Medical.txt** file, then **Open**. This will import the correct abbreviations for over 14,000 journals. Click **OK**. You now have the correct abbreviations set up in your Journals Term List.

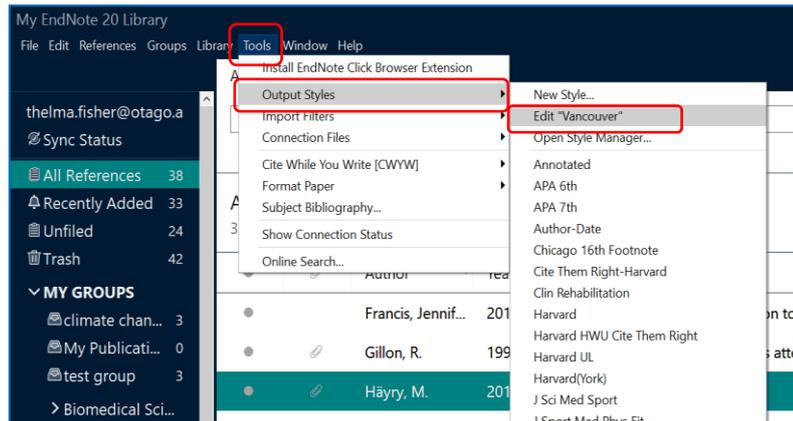


e) After the terms have downloaded, you can review the complete list by clicking on the **Terms** tab.

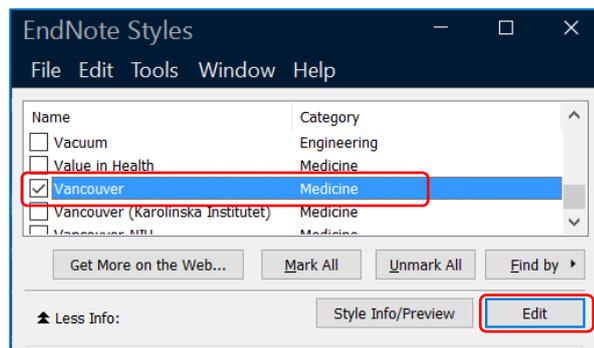


2. If using a style with abbreviated journal titles you will also need to select the correct Journal name format.

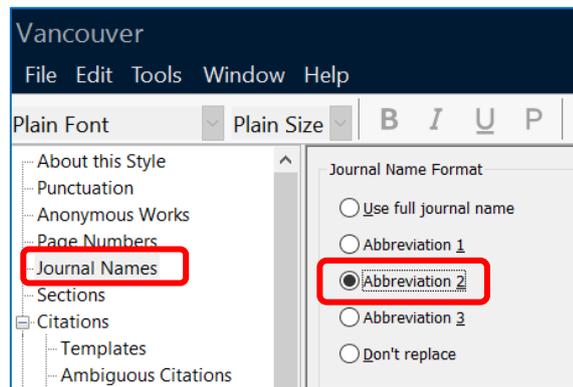
- a) Go to **Tools > Output Styles >**
Choose the Style you have open, e.g. **Edit “Vancouver”**



OR, Open Style Manager - select the style you are using then click Edit



- b) Click **Journal Names** then **Abbreviation 2**.
Close and Save the style change.
- c) You will be prompted to **Save** and rename the Style on closing this window. Decide if you want to overwrite it (i.e. retain the original Style name) or to rename it.



Finding Full Text

The following are two ways you can add a PDF to your EndNote Library.

1. Use EndNote to help 'Find Fulltext'

Note –This may not always work and you may need to use the **Drag and drop OR Attach** option

- a) Highlight the reference then click on this icon to help

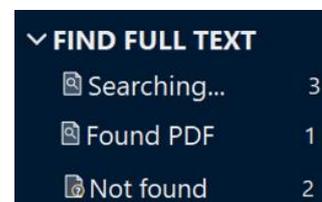


Find Fulltext OR, go to **References > Find Full Text > Find Full Text**

OR, to find the fulltext of several references, simply highlight several references or hold down **Ctrl+A** to select a whole group of references. Click on the **Find Fulltext** icon

- b) On the left sidebar under Find Full Text, it will say “Searching...”

When the searching is complete, you will see how many PDFs or URLs were ‘Found’ and/or how many PDFs were ‘Not found’.



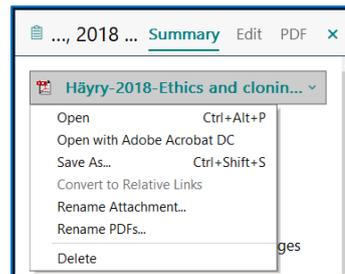
- c) Check for article titles of 'Not found' references in Library Search, Google or Google Scholar.
- d) If not found, [Request an Interloan copy](#) (free)

2. OR, Drag and Drop OR Attach

- a) Open the PDF and save it to your Desktop or Downloads
Tip – Save the PDF using the author name to avoid confusion when you attach it to a reference within your Library
- b) Now move the EndNote Library screen so that you can see the desktop.
- c) Either drag the PDF onto the selected record, OR use **+ Attach file** in the Summary or Edit panel of your EndNote reference - locate and open/add your PDF.



- d) Click the arrow beside the PDF and **Delete** it if you have attached the wrong article.



- e) A paperclip appears next to the Reference details to indicate it contains a file attachment. This is stored within the reference under the **File Attachment** field. You can now delete the PDF from the desktop.



- f) If you can't see the PDF icon yet use **Ctrl-S**, OR click away to another article and be prompted to **Save** your change.

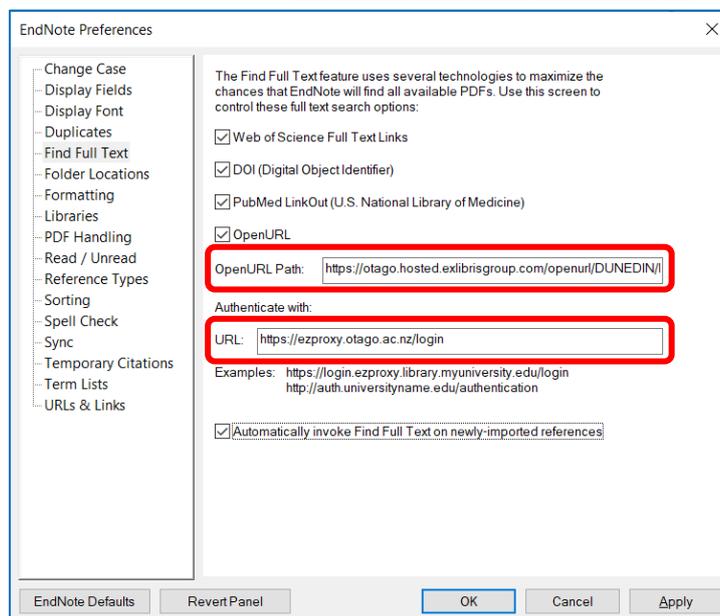
3. Setting up EndNote to help Find more Full Text (especially for Distance students)

If you are off campus this process may help you access resources that Otago subscribes to, not just open access titles free to the world.

- a) Open your EndNote Library > **Edit > Preferences > Find Full Text**
- b) Tick all 5 boxes and add these URLs:
 OpenURL Path:

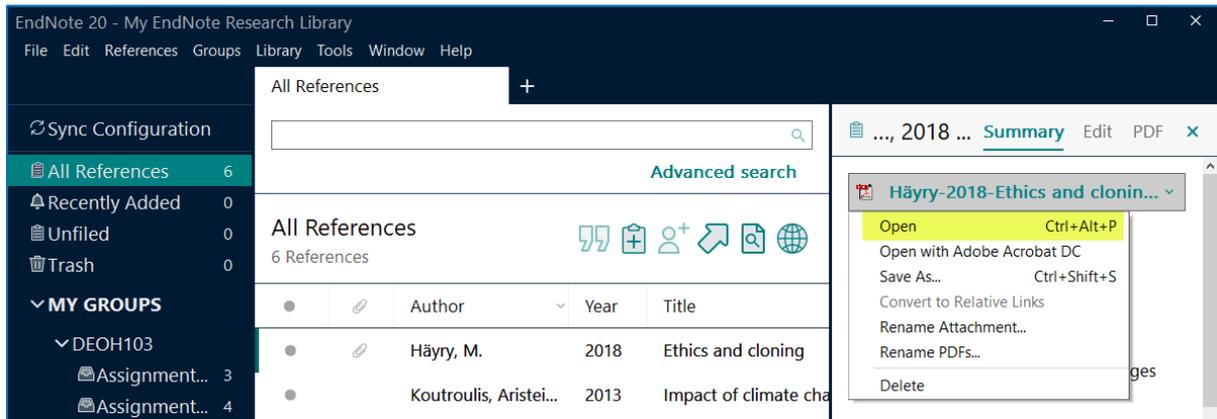
https://otago.hosted.exlibrisgroup.com/openurl/DUNEDIN/DUNEDIN_SERVICES_PAGE

Authenticate with URL: <https://ezproxy.otago.ac.nz/login> then click **OK**

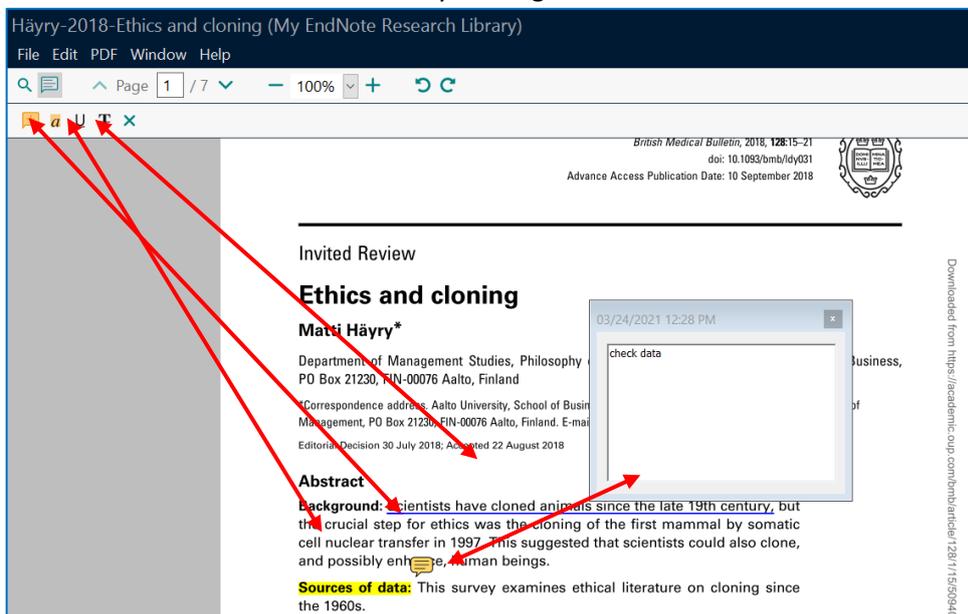


Viewing and Annotating PDFs

You can preview a PDF from the **Summary** panel by clicking the PDF title then selecting **Open**.



Lower the PDF Annotation toolbar by clicking 



2. To add a **sticky note**, click  then click within the pdf to position the  icon - double-click to open it, then write your note. When you close the sticky note window the note will be saved (or you will be prompted to save it).

3. Other features include page rotation  and Strikethrough text .

Note: You can also open a PDF by double clicking on the reference, scroll down in the Edit panel to the **File Attachments** field where the PDF is stored, and open it from there.

Sorting your References

You can easily sort your list of references by:

1. Clicking the column headers (e.g.: Author, Year, Title, etc.) in your EndNote library, or
2. Go to **Library > Sort Library**, or

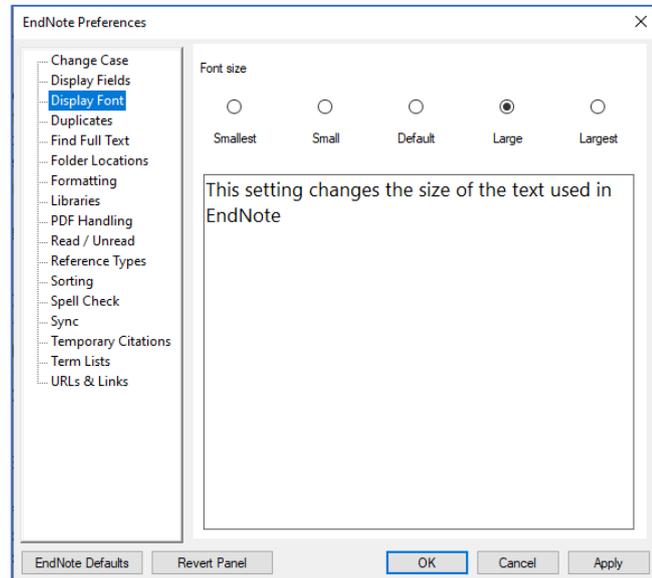
3. Drag a column header across to reorder it.

Tip: Add other useful columns to sort on – right click on the Column header bar and select or change those to display, e.g. Record Number, Date Added ...

Changing the Display Font of your References

If you are finding the records in your EndNote Library rather small to read, change the font size.

1. Go to **Edit > Preferences > Display Fonts**
2. Change from **Default** to **Large**
3. Preview the change.
4. Click **Apply**.



Searching your EndNote Library

To search the References in your Endnote Library:

1. Use the single box **Simple Search** to look for a few keywords.

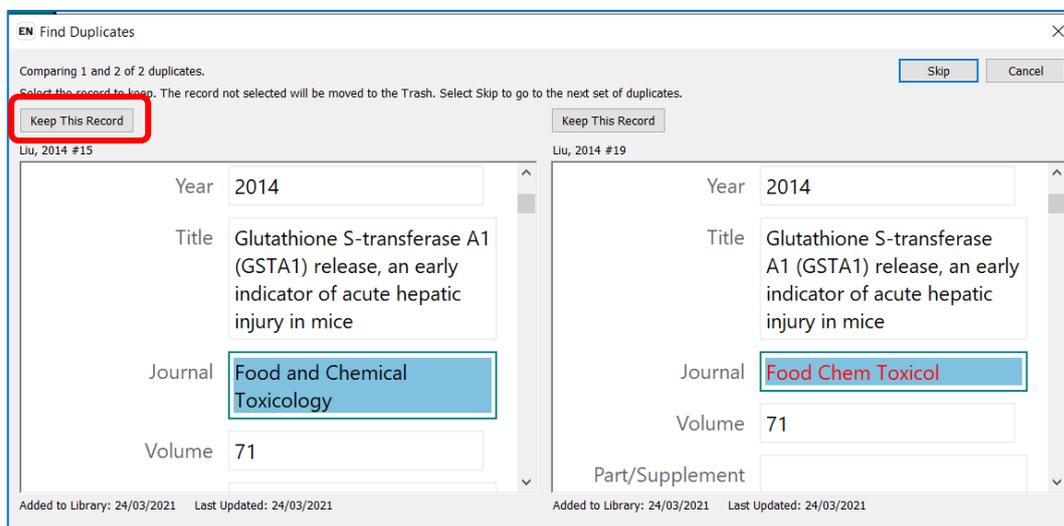
Use **Advanced search** to enter more details in additional search boxes. Select a mix of field options, including Author, Year, All fields, PDF Notes (which means your Sticky Notes!)...

2. Enter the details of your search, then click **Search**
3. View the matching records in your Endnote Library.

Removing duplicate EndNote References

1. Click on **Library > Find Duplicates**
2. If there are no duplicates a window will appear telling you this.

If there are duplicates, a window will appear displaying them. Choose the one you wish to keep; perhaps one has more information than the other – check down all fields to compare. Click **Keep This Record**. The discarded reference will be transferred to the **Trash**.



Organising your References

You can organise your references by creating groups within your EndNote library.

Advantages:

- This is a handy way to group your references by topic or by project.
- A copy of any Reference you assign to your group will always remain in your master list of **All References**. This means you can delete a group without removing the References from your Library.
- Groups function essentially like folders.
- You can assign a reference to more than one Group, which is handy when a reference may have several valuable but different points or themes.
- EndNote arranges your folders in alphabetical order.

N.B. If you are using EndNote Online to access your Library, beware as deleting any reference from there also deletes it from your laptop library as they are synchronised!

To create a group:

1. Right click on **My Groups** on the left hand side of the screen and choose **Create Group**
2. Enter the name of your group (e.g. Social Media) and press **Enter**
3. Add selected references to a Group - click and drag them into the Group folder.

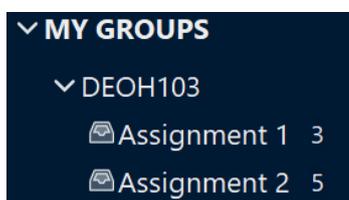


Alternatively, go to **Groups** in the toolbar, and from the drop down list choose **Add references to**, then choose the Group you want to add your references to.

To create a group set:

Creating a group set allows you to create a number of groups under a main group heading.

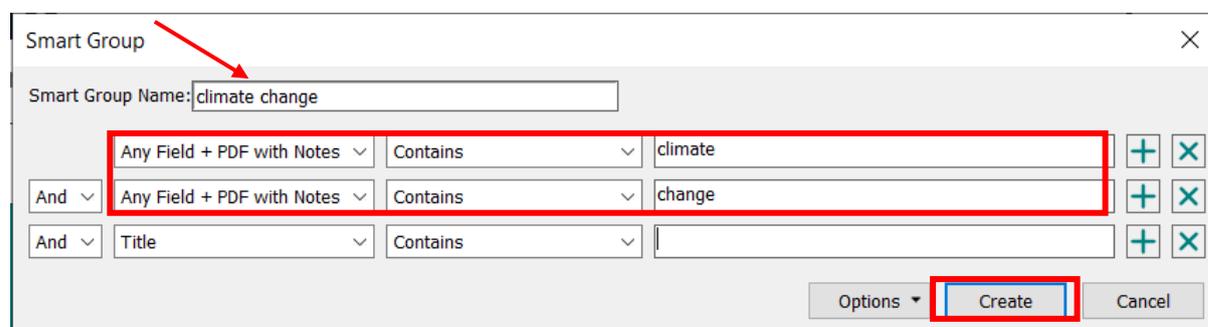
1. Right click on **My Groups** on the left side of the screen and choose **Create Group Set**
2. Enter the name of your 'Group Set' and press **Enter** (e.g. a paper code: DEOH 103)
3. Add a group(s) by right clicking on the **Group Set** heading and choosing **Create Group**
4. Enter the name of your new Group and press **Enter** (e.g. Assignment 1)
5. Create as many groups under a Group Set heading as you want.
Tip: add numbering if you want the Groups arranged in a particular order.
6. Add references to your groups (as above)



To create a Smart Group:

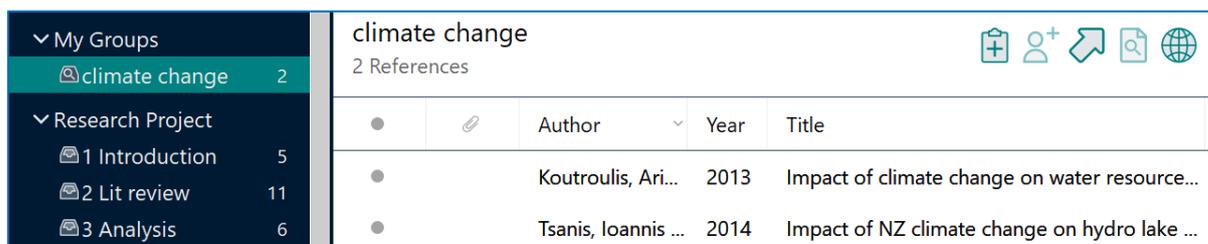
A **Smart Group** organises references based on search criteria. If a reference matches the search criteria it will be automatically added to the Smart Group. This will apply not only to references currently in the library but also any new references added to the library from that point forward.

1. Select references that you would like to search, such as a **Group** or **All References**.
2. Go to the **Groups** menu and select **Create Smart Group**
3. Give the **Smart Group** a name.
4. Enter the search parameters and specify from the drop-down menus the field in which the term(s) should appear (e.g. Author, Title, Any field + PDF with Notes).
5. Click **Create**.



In the example above, all references with the keyword *climate* AND *change* anywhere in the *Any Field + PDF with Notes* field will appear in the Smart Group.

6. Find the Smart Group on the left under **My Groups** identified by a magnifying glass symbol. 



Author	Year	Title
Koutroulis, Ari...	2013	Impact of climate change on water resource...
Tsanis, Ioannis ...	2014	Impact of NZ climate change on hydro lake ...

7. To edit a Smart Group in the future, select the Smart Group, then go to the **Groups** menu and select **Edit Group**.

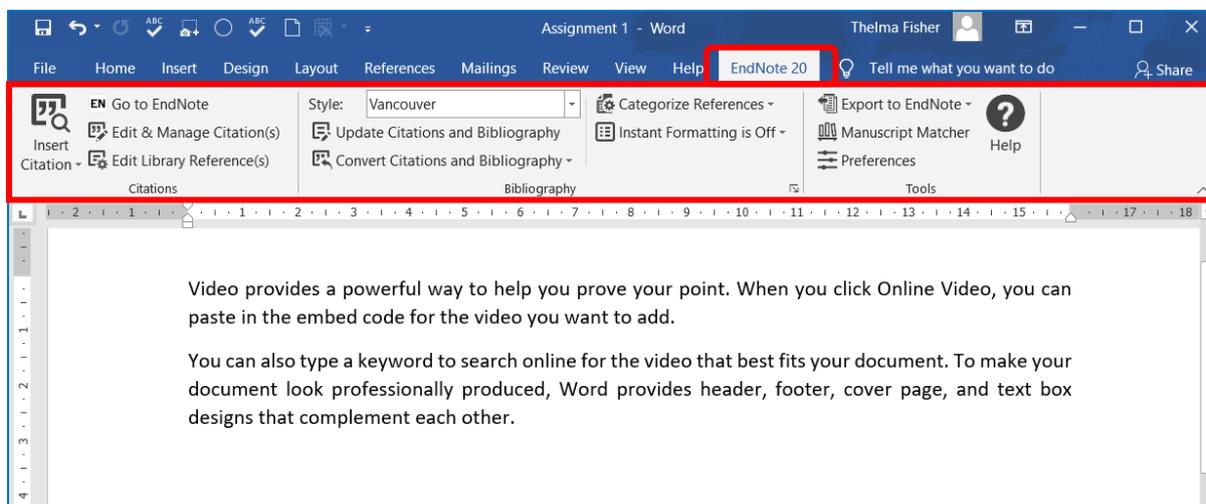
Using your References in Documents (Cite While You Write)

About 'Cite-While-You-Write' (CWYW)

The EndNote 'Cite-While-You-Write' (CWYW) functions allow you to easily and quickly insert References into a Word document as in-text citations. As they are inserted, CWYW will automatically compile the bibliography/reference list, at the end of your document. The document and bibliography/reference list can be automatically formatted in a citation style of your choice.

EndNote Toolbar

To bring up the CWYW toolbar in your Word document, click on the **EndNote 20** tab



EndNote Citation Styles

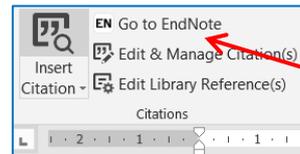
Before creating your document in Microsoft Word select a reference style. Styles determine the format for your citations and references. For Health Sciences your citation style is usually **APA 7th** or **Vancouver**. For other papers please check with your lecturer/supervisor.

Inserting References

There are several ways you can insert References as in-text citations. Here are two options:

Option 1: Insert a Reference(s) from your EndNote Library

1. Click the EndNote 20 tab in your Word document at the top of the screen.
2. Place your cursor in the text where you wish to insert a Reference.
3. On the EndNote 20 toolbar click **Go to EndNote**. You will be taken to your EndNote Library - select the Reference(s) you want to insert then click this button: 



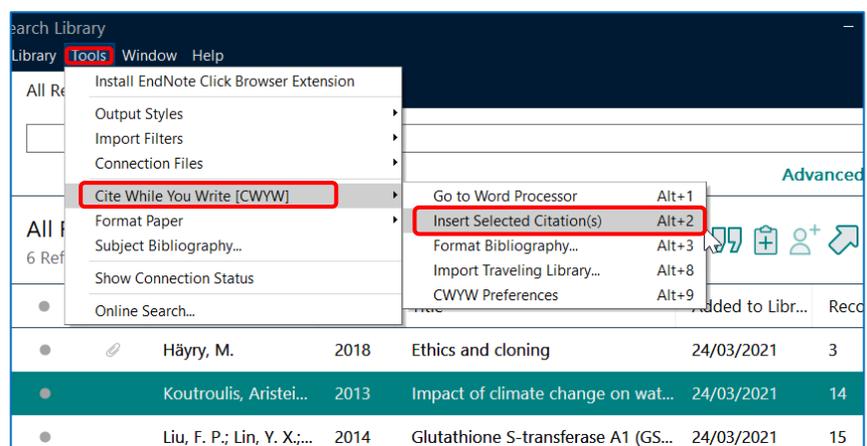
OR

Go up to **Tools >**

Cite While You Write (CWYW)

> Insert Selected Citation(s)

OR use **Alt 2**



4. In your Word document the in-text citation appears, and your bibliography starts.

Video provides a powerful way to help you prove your point. When you click Online Video, you can paste in the embed code for the video you want to add.

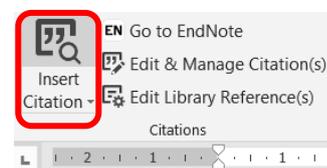
You can also type a keyword to search online for the video that best fits your document. To make your document look professionally produced, Word provides header, footer, cover page, and text box designs that complement each other.

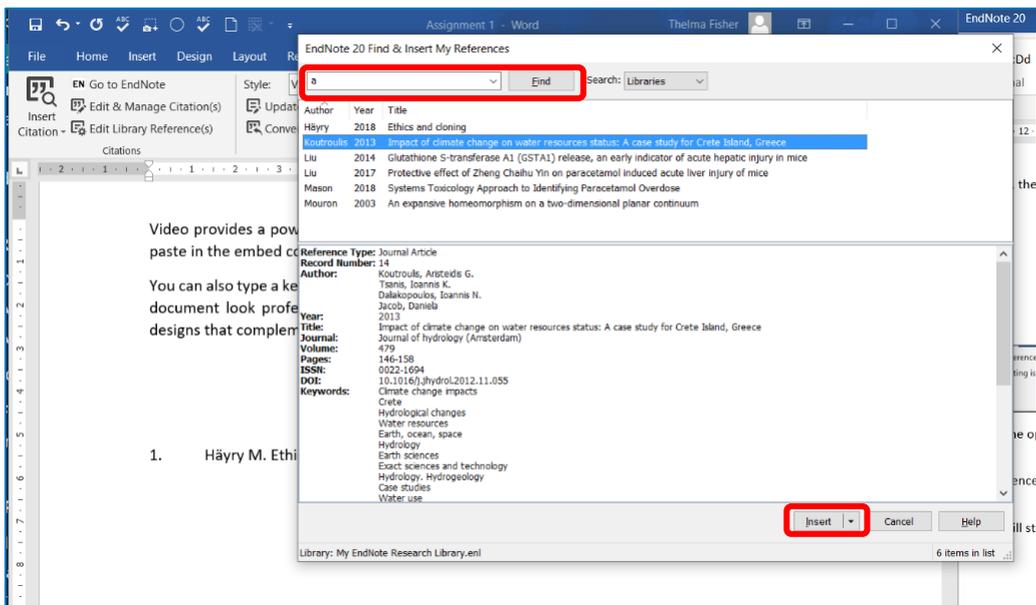
References

1. Häyry M. Ethics and cloning. Br Med Bull. 2018;128(1):15-21.

Option 2: Insert a Reference(s) into your Word Document

1. From your Word document click the EndNote 20 tab
2. Place your cursor in the text where you wish to insert a Reference, then click the mouse to mark that spot
3. Click **Insert Citation** - a window appears, offering you the option to 'Find & Insert My References'



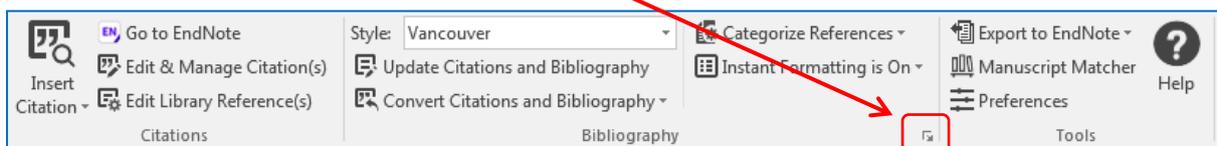


4. Search by author keyword. **Tip** – if you want to view all your References enter the letter ‘a’ and click **Find**
5. Select the Reference you want, then click **Insert**. EndNote 20 will start assembling your bibliography/reference list as you add your References.

Formatting your Bibliography in Word

Once your references have been transferred into your Word document you may wish to format your bibliography/reference list, e.g. add a title and change the spacing between references. All formatting can easily be done in Word.

Go to the EndNote 20 toolbar and beside ‘Bibliography’ click on the arrow icon.

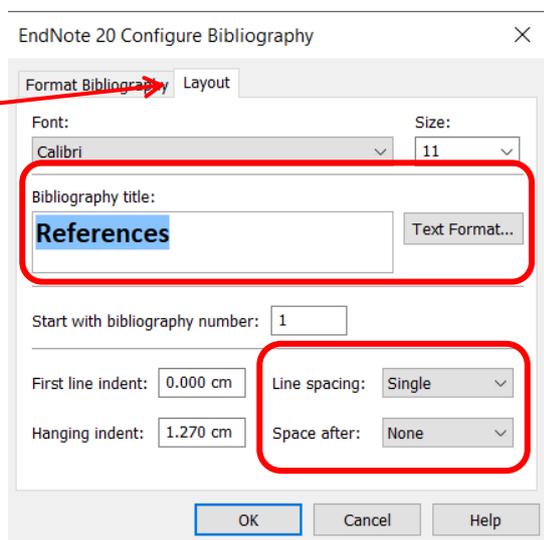


Click on **Layout**.

Type in your Bibliography title.

Highlight it, then choose **Text Format** to change font and/or size.

Change line spacing, if required.



Further tips:

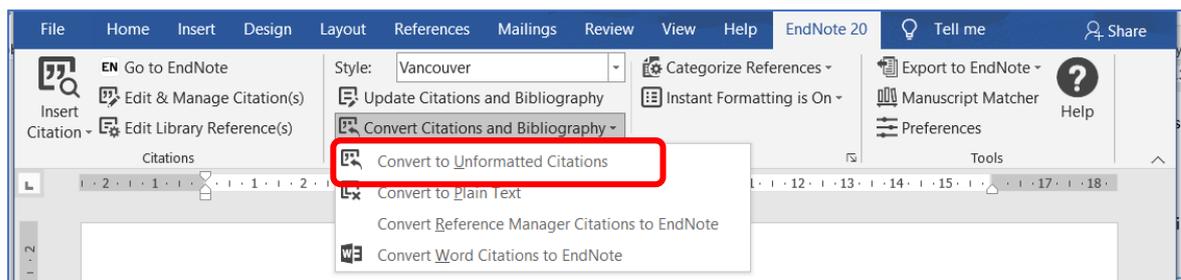
- Check all imported references, to eliminate any errors. Know your Citation style well!!
- Layout looks better with no additional line spaces within each reference, but at least 1.5 line spacing between references
- Font and size can also be managed from within Word

Unformatting Citations

EndNote 20 will start assembling your bibliography as you add your references. This feature can be turned off/hidden from within your Word document, until you have finished writing your assignment/thesis, if you prefer.

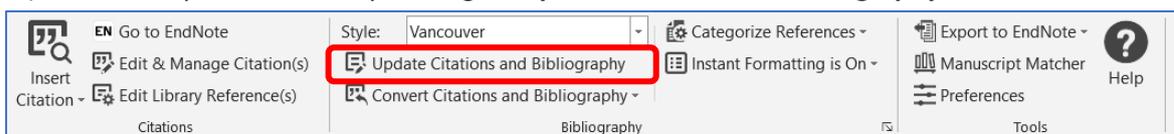
Unformatting your citations changes formatted citations to temporary citations surrounded by delimiters { }, and hides the bibliography.

- 1) Unformat your existing references from within your Word document by clicking **Convert Citations and Bibliography > Convert to Unformatted Citations**



Your in-text citations will now look like this: {Smith, 1999 #25}. When you are ready you can reformat them.

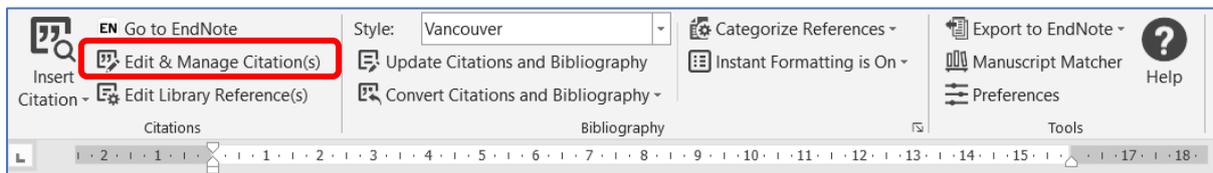
- 2) Reformat your citations by clicking on **Update Citations and Bibliography**



Editing References and Citations within your Word document

If you need to edit spelling, spacing, capitalisation, in a reference do this in your EndNote Library per reference using the **Edit** panel. **Save** the changes. Then use **Update Citations and Bibliography** in your Word document to review the changes.

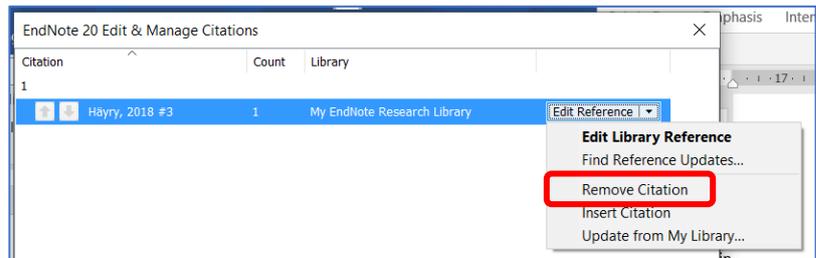
You must use the **Edit and Manage Citations** function to remove or edit a reference from your Word document. If you simply delete an in-text citation within your Word document, you will leave behind some of EndNote's hidden formatting code. This will later cause formatting problems in your document.



You also use this option to add page numbers to your document, or to exclude an author name in the in-text citation if it is already used in the sentence.

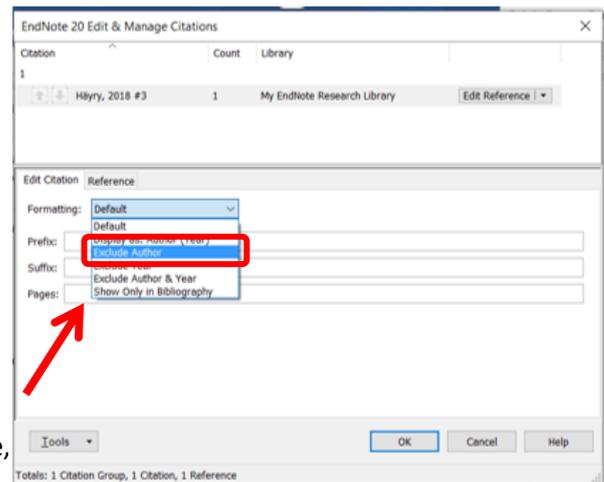
To remove a citation:

1. Click over an inserted Reference that is displaying as an in-text citation – it will go grey
2. On the toolbar click **Edit & Manage Citation(s)**
3. Go to the **Edit Reference** dropdown list; choose **Remove Citation** then **OK**



To make changes to the in-text citation by excluding author:

1. Click an inserted Reference that is displaying as an in-text citation – it will be selected in grey
2. On the toolbar click **Edit & Manage Citation(s)**
3. Click on the **Edit Citation** tab, and from the dropdown list beside **Formatting** choose **Exclude Author** then **OK**



Add page numbers here, or extra text:

1. Enter page number/s in the **Pages** box, e.g. 96-104. Do not use p. or pp. as the Citation Style will do this for you.
2. Use **Prefix** for preceding text, or a **Suffix** quote, following your in-text citation, then click **OK**.

Separating your Word Document from EndNote

Finally the paper is completed. You may want to convert the document to Plain Text in order to remove the EndNote encoding. This step creates a new copy of the document that is no longer linked to EndNote – give this document a new name. You will still retain the original document that can be reformatted later.

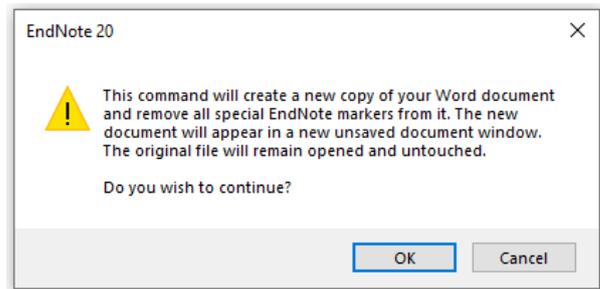
There are two main instances when you might want to do this:

- (1) If you are submitting your paper to a publisher for possible publication. Publishers do not want the version of your paper with EndNote field codes.
- (2) If EndNote is not properly formatting a citation and you wish to correct the error yourself by typing it as it should appear.

Note: You should not de-link your Word document from EndNote until you are at the very end of your writing process.

1. To remove EndNote field codes from your paper, click **EndNote 20 > Convert Citations and Bibliography > Convert to Plain Text**

2. This dialog box will appear that explains that you are about to create a new copy of your Word document which removes all EndNote field codes. Save the new, de-linked version of your document with a different name that indicates it is the version *without* EndNote field codes (e.g. [filename] noEndNote.docx).



3. You can then manually edit any text in this newly-created version of your document. If you are submitting your paper to a publisher, this is the version you would submit. You should keep the original version of your paper (that is linked to EndNote) and use it to make any amendments.

Creating an Independent Bibliography in EndNote

To create an independent bibliography:

1. Select all of the references in your EndNote 20 Library, or a Group, or make a selection of multiple references.
2. Ensure the correct output style is displaying (e.g. APA 7th or Vancouver)
3. Use **Edit > Copy Formatted** to copy references. Go to your Word document, put the cursor where you would like the references to appear, and paste (**CTRL+V**).

Emailing your EndNote 20 Library (plus your PDFs)

You can **save** your whole library, or part of it, as a compressed file so that you can:

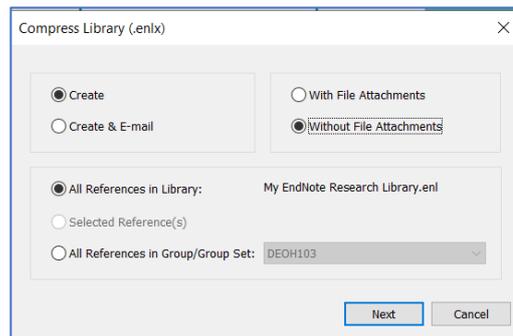
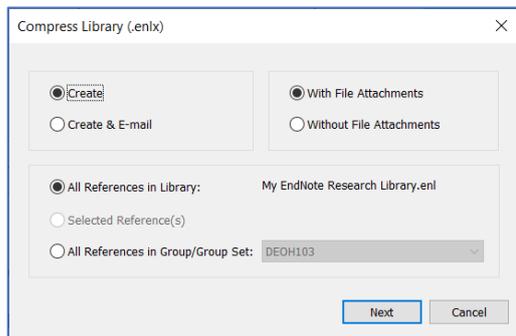
- make a back-up copy
- email it to a colleague
- work between different computers

This is useful when backing up your Library, or notifying your group/supervisor of resources in your EndNote Library. The **.enlx** file can be opened on any computer with EndNote X9.3 (or later version like EndNote 20) installed.

To email your EndNote Library to yourself:

1. Go to **File > Compress Library...** choose to **Create With/out File Attachments** for **Selected/All References**
2. With File Attachments may be too large to email....

OR Without File Attachments can be emailed.



Choose All References in your Library OR Selected References OR those in a Group/Group Set.



3. Click **Next** to Save the new file to your desktop
4. Attach this **.enlx** file to an email and send to yourself/others.
5. On your own computer, double-click the emailed Library attachment to open; or right click the email attachment then Save to your desktop. Open the library from within EndNote 20.
6. All references, plus any associated PDFs will now appear, still in their Groups.

Note: Despite compression, the file may be large, depending on how many PDFs it contains. Syncing your Library to EndNote Online may be another option for a large EndNote Library.

Sharing or Merging Group EndNote Libraries

1. EndNote 20 has a special function that allows your project group to have **ONE** EndNote Library right from the start, and to share it with up to 100 people, as your project develops. See steps below.
OR, you can each have your own EndNote Library, then later merge them into ONE main PROJECT Library for your group, preferably before starting the write-up.
2. Your Group leader will take your Word document sections, in unformatted mode, merge them into a group document, and update the in-text citations and bibliography.
3. Sharing your EndNote Library - view <https://www.youtube.com/watch?v=hAb4VNxslGs>

a) Sharing your EndNote Library

Share simultaneous access to your complete EndNote library with full read-write permissions and attachments. EndNote 20 users can share a library with up to 100 people, including you.

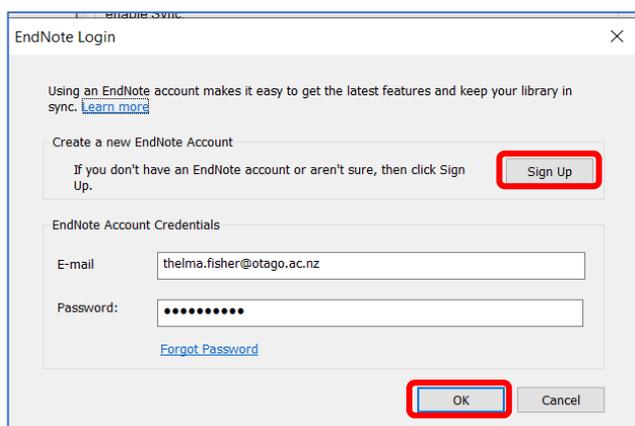
All users must Sync their own EndNote laptop and EndNote Online library. The sharing process works through EndNote Sync. A library owner can sync only one EndNote library, so only that one library can be shared with others or synced to the owner's other computers or iPad; BUT, an unlimited number of libraries can be shared with you. You will have full access to the library, which means you can add, change, or delete references and attachments.

The library can only be accessed through the **File > Open Shared Library** command in EndNote.

1. Set up **one** EndNote 20 Library for your group. EndNote 20 allows you to share selected Groups of references.
2. Sync this EndNote laptop Library with your EndNote Online Library, using **Library > Sync**.

If this is the first Sync of this Library follow the prompt and complete a compressed library back-up. The owner/group leader should make frequent/regular backups of their library using the **File > Compress Library** command.

If you already have an EndNote Online account it will have your details entered, so click **OK**. If not, click **Sign Up** and create your account, then return to this Sync window and click **OK**.

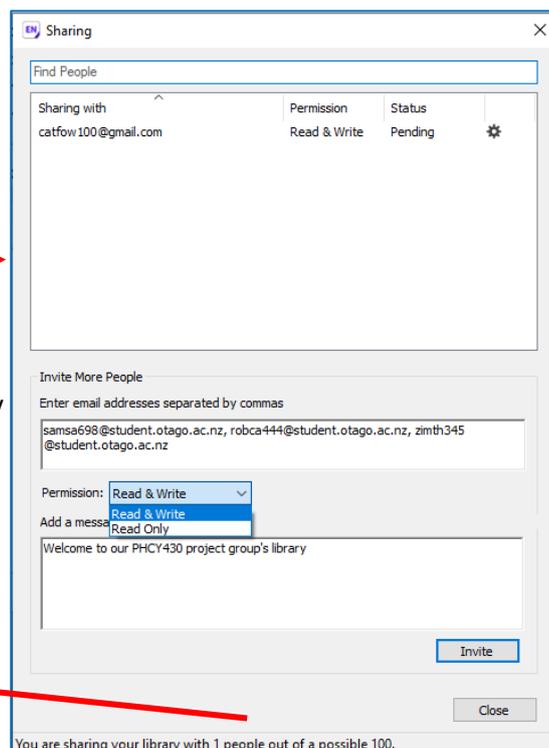


After the first **Enable Sync**, any change made in any synchronised library will be reflected in all synchronized copies of the library. Your Groups will appear in the laptop Library but your Group Sets do not appear in the EndNote Online Library view.

Note: This means if you delete references in EndNote Online or EndNote on your laptop, those references will be deleted in both!!

3. Go to **File > Share**
4. **Enter the email address/es** of who you want to invite to share your library, separated by commas.

Choose the **Permission level**: Read & Write OR Read Only
Click **Invite**



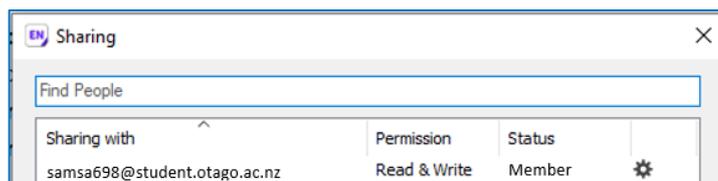
The invited names appear in the top Sharing with section. **Pending** means that Person is still to reply to your email invitation to your Shared library. They must click **Accept** in the email.

5. The invited person/s will be directed to **logon to their EndNote Online account** they Sync through. If they do not have an EndNote Online account they will be prompted, and must create one by following the screen prompts.

6. The invited person can now open the Shared Library using **File > Open Shared Library**. Select the Library by the owner's email address then click **Open**



- The Library will look the same, except in the top left corner the owner's EndNote Online account name appears, e.g. samsa698@student.otago.ac.nz.
- The next time the Owner looks at the list of names shared with, the status will show **Member**, not **Pending**, and the level of Permission granted.



REMEMBER: The owner/group leader should make frequent backups of their library using the **File > Compress Library** command.

- Do not store** your EndNote Library or backups on cloud services like Mac iCloud, Dropbox, OneDrive, GoogleDrive, Sharepoint... as syncing of files can cause corruption of your EndNote Library records and data... unless it's in EndNote Online!

b) Merging EndNote Group Libraries

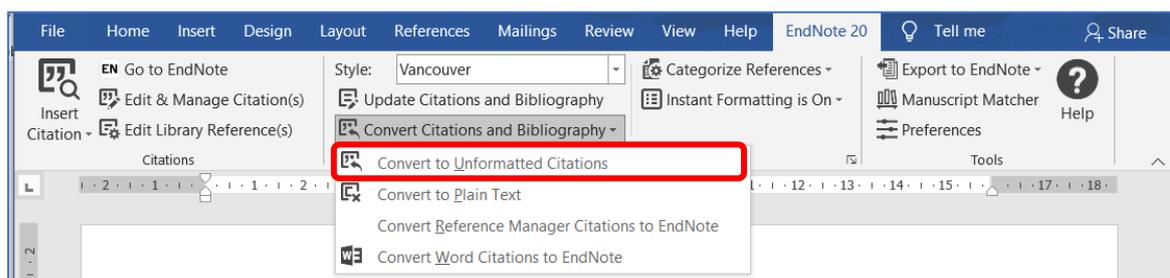
Open the EndNote Library that you want to put all your references into. If there are only a small number of references **Copy** and **Paste** them into your main EndNote library.

Note: The imported references will get a new Record Number so this may affect any text you have already inserted such references into. Using **Update Citations & Bibliography** you can reassign the correct renumbered reference.

Merging small Word documents

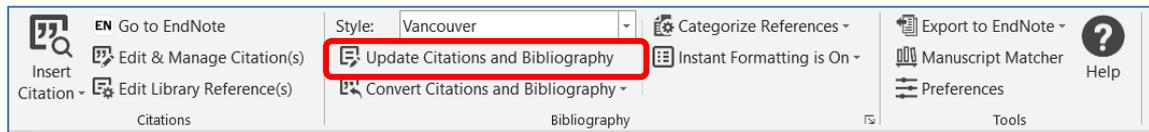
If a small number of simple documents are to be merged, a simple copy/paste operation may be the fastest way to do this. The citations in each document should be **unformatted** before attempting to copy/paste.

- Open your EndNote Library and leave it open.
- Open the first document that you wish to combine with others.
- On the EndNote tab, click on the small triangle symbol next to the **Convert Citations and Bibliography** button. A drop-down menu will appear.
- Select the option **Convert to Unformatted Citations**. The EndNote citations in your text will now appear in curly brackets. Example: {Audard, 2007 #32} and {Brown, 2009 #71 @6-7}



Repeat these steps with all documents that need to be combined, adding a page break as needed.

5. You can now copy and paste the text from the unformatted documents into a single Word document.
6. Once combined, click **Update Citations and Bibliography** to reapply the Citation style of your choice.



Additional EndNote support

EndNote has its own [training site](#) for users.

If you need any further help using EndNote, please email the Reference Librarians at the Wellington Medical & Health Sciences Library: medlibref.uow@otago.ac.nz