



EndNote X7 Mac User Manual

# EndNote X7

# for

## Mac

# **User Manual**

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## Where Can I Get Help With EndNote?

#### The Help menu within Endnote:

A useful and recommended resource.

The CSU Library's Endnote Library Guide:

http://libguides.csu.edu.au/endnote

Any training videos, patches, or changes to the training notes are listed here, as well as frequently asked questions.

#### Endnote FAQs and Blog:

Someone else has probably had the same problem, so why not check the FAQs & Help tab in the Library's EndNote Guide <u>http://libguides.csu.edu.au/aecontent.php?pid=539394&sid=4436797</u>

Or keep up to date with the blog? http://Endnoteblogcsu.blogspot.com/

Ask your friendly Faculty Liaison Librarian:

http://www.csu.edu.au/division/library/research/faculty/

Faculty liaison librarians are based at the Albury-Wodonga, Bathurst, Orange and Wagga Campuses to support academic staff, researchers and postgraduate students.

#### Book-A-Librarian for some training (academic staff, researchers and postgraduate

students only):

If you would like more training, then book a session with one of your Faculty Liaison Librarians. Complete the form found at: http://csu.altarama.com/reft100.aspx?key=ask\_copy4&ref=120

#### The Thompson & Reuter's Online User Guide:

Thompson & Reuter's EndNote Online User Guide is available from the EndNote website <a href="http://endnote.com/if/online-user-manual/x7">http://endnote.com/if/online-user-manual/x7</a>

The Endnote website:

http://www.Endnote.com/

You can download new or updated output styles from this website and view online tutorials.

## Part 1 – Creating and Managing your EndNote Library

## **Getting Started**

These training notes assume that you have installed EndNote into your Applications folder.

- 1. Open the Applications folder
- 2. Click on the EndNote X7 folder
- 3. Click on the EndNote X7 application icon
- 4. The first time you start the software, you will see the EndNote customizer screens. Click on **Next** several times, and then **Done**
- 5. EndNote displays a welcome screen showcasing the features of X7



If you are upgrading EndNote from a previous version, and you already have an EndNote library, your EndNote library will automatically open.

If you have never used EndNote before, a new EndNote library called "My EndNote library" will be created for you and saved in the **Documents** folder.

The new library appears as an empty EndNote library, showing "0 of 0 references"

000		📴 My EndNote Li	brary.enl			
		тномзом	REUTERS		Q- Search Librar	у
My Library	▼ ● 👍 🖉	Author	▲ Year	<u> 豪</u>	0 0 - 🗋 🖂	D 0
🔁 All References				No Reference Selected	There are no PDFs attached to this	
🗑 Trash					reference	
MY GROUPS						
▼ FIND FULL TEXT						
				APA 6th		
				No Reference Selected		

#### **Build your Library**

#### Downloading References from Electronic Resources.

#### **General Tips**

Information from electronic resources, such as the Library discovery tool; Primo, and other information databases and Google scholar can all be exported into your EndNote Library.

#### **Primo Search**

Items found using Primo can be exported to EndNote, both individually and as a group. As with all exports it is important to check your references in your EndNote library as some editing may be required.

Safari users note: Safari does not recognise the direct export command from Primo as files it can import. See the note after step 5 for further instructions on exporting Primo search results into EndNote using Safari or Firefox.

#### **Individual References**

- 1. Login to PRIMO and do your search as normal
- 2. Open the **Details** tab

	grape 2012 ● Online access
Reference entry	View online Details Reviews & Tags More options
enuy	
	Title: grape
	Date: 2012

3. Click on the Send To tab

4. Choose EndNote (RIS)



5. Import to Citation Manger box will appear, it will default to UTF-8, click Ok

#### For Safari users:

At this point Safari will download a file named Primo\_RIS\_Export.ris

- 1. Drag and drop the downloaded file to the EndNote application icon on the Dock
- 2. EndNote will open (if it is not already) and the file will automatically import.

EndNote should import the file into your current library. If you are asked to choose a Reference Library, use the **Open Reference Library** window to find and click on your EndNote library

#### For Firefox users:

The first time you do this, Firefox will present you with an "opening delivery" window:

000	Opening Primo_RIS_Export.ris
You have chose	n to open:
Primo_RIS_Ex	port.ris
which is: ris F	ile (276 bytes)
from: http://p	primo.unilinc.edu.au
What should Fir	efox do with this file?
Open with     Save File	Choose
Do this auto	omatically for files like this from now on.
	Cancel OK

- 1. Click on Open with
- 2. Click on Choose
- 3. Find the EndNote application icon in your Applications folder
- 4. Click on the EndNote icon
- 5. Click on Open
- 6. Click the box next to **Do this automatically** and click on **OK**. You should not need to do this process again

EndNote should offer to open your current library. If it doesn't, use the **Open Reference Library** to find and click on your EndNote library file

The reference will be added to your most recently opened EndNote Library.

#### **Multiple References**

- 1. Login to PRIMO and do your search as normal
- 2. Choose your references, select Send To tab and Add To My Folder



- 3. Do this for all the references you would like to add to EndNote.
- 4. In the top right click My Folder

CSI	U HOME	CSU NEWS	LIBRARY	CUR	RENT STUDEN	TS	STAFF	CONTACT CSU
							V Ch Un	arles Sturt iversity
			Merrell Tabit	tha	🚞 My Folder	r My	Library Red	ord LOG OUT
New Search	Journa	l Databases	eJournals CR	o   1	L Request	Othe	r Library Ca	talogues Help

5. Select the references you would like to add to EndNote

My Folder	Search History	My Library Record						
T.								
🚞 My	Folder (2)*	My Folder			🗶 E	Email Print 🗸	Select how to save Push to Blackboard	Co]
	ary items, ly be saved	Туре	Author	Title		Added	Push to EndNote Web Push to RefWorks	
	ently if you	Book     Book	Ian F Spellerberg Andrew S, Pullin		ervation biology / edited by Ian F. Spellerberg ervation biology / Andrew S. Pullin.	12/02/20 12/02/20	Push to delicious Push to EndNote (RIS)	
-		the <b>Send To</b> EndNote (RI						
Email	Print 🗸	Select how to save Push to Blackboard	Co]					
Ad	ded	Push to EndNote We	b					
		Push to RefWorks						
g. 12/	02/20	Push to delicious						
12	02/20							
	_	Push to EndNote (R	s)					

8. Import to Citation Manager, it will default to UTF-8 and click Ok

Safari users note: Safari does not recognise the direct export command from Primo as files it can import. See the instructions on page 13 on exporting individual references for further information.

**WARNING!** There are a few things to note when using PRIMO to export to EndNote:

- For books all authors and editors come across into the Author field, so some editing may be required for edited books.
- Corporate Authors records that include corporate authors can be made to export with the appropriate comma, the normal filter will not include this. If this is something that you regularly export, you can edit the filter, see below for more instructions. Otherwise you can edit the record.

#### **Editing EndNote Filters**

To change the import of Corporate Authors to include a comma, you will need to go into the EndNote program.

Click Edit, Import Filters



If you have been using the RefMan RIS filter it will be listed and you can click "Edit RefMan RIS" if not, choose New Filter and then choose RefMan RIS from the list of options, then click Edit.

ndo edo ut opy aste lear elect All opy Formatted nd and Replace poelling	#2 ☆#2 #X #C #V #K #K #R	Elam 2010	The Health.enl Thomson Reuters* Title Stuffed and starved : markets, powers at Effect on bone health of estrogen prepa Visionary leaders for information
ut opy aste aste With Text Styles lear elect All opy Formatted ind and Replace belling	₩X ₩C ₩V ₩A ₩K ₩R	2007 Elam 2010	Title Stuffed and starved : markets, powers a Effect on bone health of estrogen prepa
opy aste lear elect All opy Formatted ind and Replace belling	₩C ₩V ₩A ₩K ₩R	2007 Elam 2010	Title Stuffed and starved : markets, powers a Effect on bone health of estrogen prepa
aste aste With Text Styles lear elect All opy Formatted ind and Replace poelling	₩V ₩A ₩K ₩R	2007 Elam 2010	Stuffed and starved : markets, powers a Effect on bone health of estrogen prepa
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lear elect All opy Formatted nd and Replace pelling	жа жк жR	Elam 2010	Effect on bone health of estrogen prepa
elect All opy Formatted ind and Replace pelling	жа жк жR		
opy Formatted nd and Replace pelling	жK ЖR		
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utput Styles	•		
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art Dictation	fn fn	Open Filt	er Manager
pecial Characters	^₩Space		
	utput Styles nport Filters onnection Files tart Dictation	utput Styles  poort Filters  connection Files  tart Dictation fn fn	utput Styles  nport Filters  New Filte onnection Files  Edit "Refi Open Filt tart Dictation fn fn

Once you are in the filter, choose the **Author Parsing** option and under the Last & First Names: click on the drop down menu and change from Smart to **Import As Is.** 

00	😽 RefMan RIS.enf
About This Filter Templates Author Parsing Continuation Lines Reference Type Editor Parsing Field Editing MARC Records Record Layout Source Parsing	Author Parsing          Name Order:       Last Always Precedes First ‡         Interpret First Names As:       Smart ‡         Author Name Separators       Between Authors:         Between Authors:       Smart ‡         Last & First Names ✓ Smart       Space         Parenthetical Data in A       Import As Is         Discard       Other         Import Into       Notes ‡

If you have any difficulties, contact a Faculty Liaison Librarian for assistance.

#### Library databases

You can search the databases from the CSU library webpage, and then export the search results to EndNote.

Safari users note: Safari does not recognise the direct export command from database searches as files it can import. See the note after step 7 for further instructions on exporting search results from Safari and Firefox into EndNote.

Within the Ebsco databases, you can export citations from the results screen as shown below:

Basic Search Advanced Search Search History >         Refine Results         Current Search         Current Search         Boolean/Phrase:         Ti diabetes management         Limiters         Published Date:         20050101-20131231         Imit To         Full Text         Full Text         References Available         Abstract Available	EBSCO	diabetes ma	inagement	TI Title   Search Clean	• •	
Basic Search Advanced Search   Search Results: 1 - 20 of 525   Refine Results Search Results: 1 - 20 of 525   Relevance - Page Options - Share -   Current Search   Indiabetes management   Limiters   Published Date:   20050101-20131231   Imit To Full Text References Available Abstract Available Subjects: Thereacy, additional provided adults with type 1 diabetes. Subjects: Check SFX for more information Click here to add records to folder Totage for Sare - Folder ha i Items Click here to add records to folder Totage for Sare - Folder ha i Items Imit To Imit To Subjects: That Aged: 45-64 years; Aged: 65+ years; Female; Male Subjects: Check SFX for more information Subjects: Check SFX for more information Subjects: Check SFX for more information References Available Abstract Available Check SFX for more information Click here to add records to folder Click here to		AND -		Select a Field (optional) -		
Refine Results       Search Results: 1 - 20 of 525       Relevance - Page Options - Share -       Folder he i Items         Current Search       •       1. Empowered Diabetes Management: Life Coaching and Pharmacist Counseling for Employed Adults With Diabetes.       •		AND +		Select a Field (optional) -		Click here to view folder
Current Search Boolear/Phrase: Ti diabetes management Limitrs Published Date: 20050101-20131231 Imit To Full Text References Available Academic Full Text References Available Academic Full Text References Available Academic Full Text References Available Academic Current Search Current Search Academic Current Search Academic Academic Academic Current Search Academic		Basic Search	Advanced Search Search Histo	ory ⊧		
Content General       1. Empowered Diabetes Management: Life Coaching and Pharmacist Counseling for Diabetes.       Idiabeted         Boolear/Phrase:       Ti diabetes management.       Imit Christy: Controlled trial, research, tables/charts) ISSN: 1090-1981 PMID: 23174629       Idiabetes.       Idiabetes         Nishita, Christy: Controlled trial, creation: Subjects: Pharmacists: Counseling: Self Care: Diabetes Mellius; Health Promotion: Support, Psychosocial; Adult: 19-44 years; Manage       Idiabetes       Idiabetes         Published Date:	Refine Res	sults	Search Result	s: 1 - 20 of 525	Relevance - Page Options - Share	Folder hall items
Published Date:       20050101-20131231         Journal       Journal         Imit To       2. Impulse control, diabetes-specific self-efficacy, and diabetes management among emerging adults with type 1 diabetes.         Full Text       Suplansky, Nathan W; Hanna, Kathleen M; Slaven, James E; Weaver, Michael T; Fortenberry, J Dennis; Journal of Pediatric (English), 19 days ago         References Available       Abstract Available         Abstract Available       StrF.X Check SFX for more information	Boolean/Phr TI diabetes ma	ase:	Employed Adul	Its With Diabetes. Ia, Christy; Cardazone, Gina; Uehara, Denise Lea; Tom, T al article - randomized controlled trial, research, tables/ch bacts: Pharmacists; Counseling; Self Care; Diabetes Mellitt	ammy; Health Education & Behavior, 2013 Oct; 40 (5): 581-91. arts) ISSN: 1090-1981 PMID: 23174629	diabetes S Empowared Diabetes Manage
Imit To       emerging adults with type 1 diabetes.       Research and Markets:       Research and Markets:       Calibrian       Calibrian       Calibrian       Stupiansky, Nathan W; Hanna, Kathleen M; Slaven, James E; Weaver, Michael T; Fortenberry, J Dennis; Journal of Pediatric       Research and Markets:       Calibrian	20050101-201	31231				Telcare, Inc. and Health (Business Wire (English),
Abstract Available     Academic     Os-Fr.X     Check SFX for more Information     Click here to add     Dario Smartphone-Based       Abstract Available     Academic     records to folder     Click here to add			emerging adult	s with type 1 diabetes. ansky, Nathan W; Hanna, Kathleen M; Slaven, James E; V	Weaver, Michael T; Fortenberry, J Dennis; Journal of Pediatric	Can (Business Wire
			Øs.		Click here to add	Dario Smartphone-Based Di (Business Wire

- 1. Click on the **Add to folder** icon to save your reference to a folder. You can also select a range of references with one click look for the link to add all of the displayed records at once.
- 2. Go through the pages of results selecting all of the relevant articles.
- 3. Click on Folder view link.
- 4. The saved items will be listed. You will need to select All again
- 5. Click on the **Export** option.

	Folder Contents		СН	ARLES STURT UNIVERSITY
«	Back	Articles 1-2 of 2 Page: 1 Select / deselect 1. Empowe Adults With Academic Journal C 2. Impulse of adults with	aion, Sign In to My EBSCOhost.  Export option  Anne   Page Options  all  Delete Items  red Diabetes Management: Life Coaching and Pharmacist Counseling for Employed  Diabetes.  Nishita, Christy: Cardazone, Gina; Uehara, Denise Lee; Tom, Tammy; Health Education & Behavior, 2013 Oct; 40 (5): 581-91.  (journal airtich = randomized controlled rial, research, tables/charis) ISSN: 1090-1981 PMID: 23174629, Database: CINAHL Plus with Full Text  Subjects: Pharmacists: Counseling: Self Care; Diabetes Mellius; Health Promotion; Support, Psychosocial; Adult: 19-44 years; Middle Aged: 45-64 years; Aged: 65+ years; Female; Male  Linked Full Text  Option  Control, diabetes-specific self-efficacy, and diabetes management among emerging type 1 diabetes.  Supansky, Nathan W; Hanna, Kathieen M; Slaven, James E; Weaver, Michael T; Fortenberry, J Dennis; Journal of Pediatric	
		Academic Journal	Stupiansky, Nathan W, Hanna, Kathleen M, Slaven, James E; Weaver, Michael T; Fortenberry, J Dennis, Journal of Pediatric Psychology, 2013 Apr. 38 (3): 247-54, (journal article) PMID: 23115219, Database: CINAHL Plus with Full Text OsrFX Check SPX for more information	

- 6. Ebscohost is preset to do a **Direct Export to EndNote, Procite or Reference Manager**
- 7. Click on Save

#### For Safari users:

1. At this point Safari will download a file name 'Delivery', (or "Save records" from the Informit databases, or "ovidweb.cgi" from the OVID databases)



- 2. Drag and drop the downloaded 'delivery' file (or other named file) to the **EndNote application icon on the Dock**
- EndNote will open and prompt you to select a Library in which to import the files
- 4. Choose the Library and references will automatically import.

#### For Firefox users:

**Note:** The first time you do this, Firefox will present you with an "opening delivery" window:

	000	Opening delivery
	You have chose	an to open
	delivery	
	which is a: ap	oplication/x-research-info-systems
	from: http://	web.ebscohost.com
	What should F	irefox do with this file?
	- Open with	Choose
Click here to select both	O Save to Dis	
options	Do this au	tomatically for files like this from now on.
		Cancel OK

- 1. Click on Open with
- 2. Click on Choose
- 3. Find the EndNote application icon in your Applications folder
- 4. Click on the EndNote icon
- 5. Click on Open

6. Click the box next to **Do this automatically** and click on **OK**. You should not need to do this process again

EndNote should offer to open your current library. If it doesn't, use the Open: window to find and click on your EndNote library file

The references will be transferred to your library in an "Imported references" temporary group. This is to enable you to evaluate and modify the new records before looking at your entire library

#### **Google Scholar**

Safari users note: Safari does not recognise the direct export command from Google Scholar searches as files it can import. See the note after step 4 for further instructions on exporting search results from Safari and Firefox into EndNote.

To set Google Scholar Settings,

1. Click on the Settings option in the top right of the page.

	/ My Citations	Metrics	M Alerts	Sign in
Google				
Articles ( include patents)      Legal documents	<b>τ</b>			
Stand on the shoulders of giants				

2. Click on **Bibliography Manager = Show links to import citations into EndNote**, and Save these settings.

Search results	0-11-01-02
anguages	Collections
brary links	Search articles ( / include patents).
iorary miks	Search legal documents.
	Results per page
	10    Google's default (10 results) provides the fastest results.
	Where results open
	✓ Open each selected result in a new browser window.
Г	Bibliography manager
	O Don't show any citation import links.
	Show links to import citations into     EndNote      A

- 3. Locate required reference in Google Scholar
- 4. Click Import into EndNote link displayed below each record in *Google Scholar* search results

#### For Safari users:

At this point Safari will download a file named 'scholar.enw'

- 1. Drag and drop the downloaded file to the **EndNote application icon on the Dock**
- 2. If asked, choose a Reference Library to import the reference into
- 3. Click OK

#### For Firefox users:

**Note:** The first time you do this, Firefox will present you with an "opening scholar.enw" window:

	Opening scholar.enw
'ou have ch	osen to open:
scholar.e	nw
which is:	enw File (258 bytes)
from: htt	p://scholar.google.com.au
What shoul	d Firefox do with this file?
Open v	vith Choose
O Save Fi	le
🗹 Do this	automatically for files like this from now on.
	an be changed using the Applications tab in Preferences.
	Cancel OK

- 1. Click on **Open with**
- 2. Click on Choose
- 3. Find the EndNote application icon in your Applications folder
- 4. Click on the EndNote icon
- 5. Click on Open
- 6. Click the box next to **Do this automatically...** and click on **OK**. You should not need to do this process again

EndNote should open your current library and import the reference. If it doesn't, use the **Choose a Reference Library** option to navigate to your EndNote Library. The references will be transferred to your library in an "Imported references" temporary group. This is to enable you to evaluate and modify the new records before looking at your entire library

#### Manually Entering Information into Your Library

Sometimes you will have references that need to be added manually or you may need to modify an imported reference.

Make a new reference in your library by

- Clicking on the References menu and clicking on New Reference
- Using the Cmd (%) + N short cut or

Clicking on the New Reference icon
 in the top header

			Reference		
Journal Article	: 泰 *	4 20 [	ie 🖉 🐇	W4 📑	
Rating					
Author					
Year					
Title					
Journal					
Volume					
Issue					
Pages					
Start Page					
Epub Date					
Date					
Type of Article					

The default new record is a **Journal article** reference type. If you need to create a record for a different type of item, choose a reference type from the dropdown list at the top of the window. If you change the record type, the fields will alter to match the information needed to reference the new type.

Enter bibliographic information into the appropriate fields in the Reference window. You may not need to enter information in all the available fields.

When you are finished, close the reference to save it and add it to the library.

#### Moving through the document window

- Use the scroll bar to look at the fields, which may change according to the needs of the reference type.
- The active field is surrounded by a border. Press the **Tab** key to select the next field in the reference. Press **Shift** + **Tab** to select the previous field.
- 'Next Reference' and 'Previous Reference' buttons at the top of the reference window allow you to browse references in a library.
- Closing a reference: Click on the close box or press Command + W to close a reference and save any changes.
- Special bibliographic formatting and punctuation <u>should not</u> be included when you enter reference data into EndNote. For example, you do not need to put quotes around titles, italicise journal names, or include the abbreviation 'Vol.' along with volume numbers. Enter only the raw data and leave the formatting to EndNote.

#### **Term Lists and Auto Suggest**

As you enter new references into your library, EndNote notes any new terms that are typed into the Author, Journal, and Keywords fields. New terms are indicated in red text. EndNote saves these and will auto-suggest them when you enter anything similar, to save you some typing.

<b>Tips for</b>	choosing the	right reference	e type
-----------------	--------------	-----------------	--------

Use <b>Book</b>	For books written by one or more authors
Use Edited Book	for books edited by one or more editors (whether they are books in a series or not).
Use <b>Book Section</b>	For references to parts of edited or non- edited books (a chapter, for example, or one article in published conference proceedings).
Use Conference Proceedings	For unpublished proceedings
Use Conference Paper	For articles that are published as part of the comprehensive conference proceedings
Use Journal Article	For journal articles that appear either online or in print.
Use the <b>Web Page</b>	For citing material from a Web page or ftp site.
Use Personal Communications	For email discussions
Use <b>Chart/Table</b>	if you want to include an image and later insert that image as a table in Microsoft Word (Images in all other reference types will insert into Word as figures, which are
	listed and numbered separately from tables)

#### **Entering author names**

In general, entries with more than one author or editor must be entered *one name per line*. It is best to enter authors in the following order:

#### <Family name><comma><space><First name><space><middle name or initial> e.g. Suzer, Max E.

EndNote abbreviates first and middle names if required, so for maximum flexibility enter whole names whenever possible. If you are entering initials, type a period or a space between initials, (for example 'Merrell, T.A.' or 'T A Merrell'), otherwise EndNote interprets the initials as a single name: 'Ta.' If a reference <u>has no author</u>, you should leave the Author field blank. Do not enter 'Anonymous.' EndNote will manage this according to the referencing style you choose.

		ł	lilliard	l, 20	13 #	16		
Journal Article	:	▼ A	¢ 🙃	R	0	њ	W,	E
Author								
Hilliard, Marisa E. Wu, Yelena P.								
Rausch, Joseph								
Dolan, Lawrence M. Hood, Korey K.								
Year 2013								
Title Predictors of Deteriorations in Diabetes M	Manager	ent and	Contro	ol in A	dole	scents	s With	1 Type 1 Diabetes
Journal								
Journal Journal of Adolescent Health								
ISSN								
1054-139X								
DOI								
10.1016/j.jadohealth.2012.05.009								
Keywords								
Type 1 diabetes								
Depression Distress								
Family conflict								
Blood glucose monitoring								
Glycemic control								
Abstract								
Added to Library: 19/11/20	12 Last	Update	d: 18/	2/20	13			

The table below demonstrates how EndNote will interpret the author data that you enter. The names in **bold** indicate what EndNote will identify as the family name.

Data Entered	EndNote interpretation	Data entered	EndNote Interpretation
Jones, Davey	Davey <b>Jones</b>	Zhang, Haiyuan	Haiyuan <b>Zhang</b>
Davey Jones	Davey <b>Jones</b>	Haiyuan Zhang	Haiyuan <b>Zhang</b>
van der Laar, Lianne	Lianne <b>van der Laar</b>	Department of Agriculture,	Department of Agriculture
Lianne van der Laar	Lianne van der <b>Laar</b>	Department of Agriculture	Department of <b>Agriculture</b>

#### **Entering Dates**

The APA 6<sup>th</sup> manual states:

"Do not include retrieval dates unless the source material may change over time (e.g., Wikis)" (American Psychological Association, 2010, p. 192).

If you **DO** still need to enter a date, you can put the date in as: 28th July 2005 28 Jul 05 or 7/28/05 **Note:** If you want to use numbers only, you MUST put them in using the American style of Month/Date/Year.

Choose one style and use it consistently, or the citations will look odd in a bibliography.

#### Adding File Attachments to your EndNote Library

Each EndNote record has a File attachments field. EndNote makes a copy of the original file and places it in the DATA folder that is created with your EndNote database.



You can attach a PDF to a record by

- 1. Selecting the record in your EndNote Library
- 2. Clicking on References in the top menu
- 3. Select File Attachments
- 4. Select Attach File and then locate the pdf or any file to attach to the record

Alternatively you can drag and drop PDF and other file types into selected records in your EndNote Library. EndNote will always be able to access the file, even when you share your database with a colleague.

#### Opening a PDF with EndNote's PDF viewer

There are a couple of different ways to open a PDF within EndNote

1. Double click on the reference that contains the PDF that you want to view:

000 Houweling, 2011 #30	
JCN Journal of Clinical Nursing	Experiment of the second secon
Journal of DIABETES Clinical N	Layout
Can diabetes management be safely transferred to practice nurse primary care setting? A randomised controlled trial	
Sebastiaan T Houweling, Nanne Kleefstra, Kornelis JJ van Hateren, Klaas H Groenier, Betty M de Jong and Henk JG Bilo	Meyboom- 2 PDF view selected
Aims and objectives. To determine whether the management of type 2 diabetes mellitus in a primary care setting o transferred to practice nurses. Background. Because of the increasing prevalence of type 2 diabetes mellitus and the burden of caring for individ the demand type 2 diabetes mellitus patients place on primary health care resources has become overwhelming.	Contraction of the second seco
Added to Library: 8/01/2014 Last Updated: 8/01/2014	

The layout tab in the bottom right corner needs to be set to show PDF

2. With the main EndNote Library layout set to show any of the following views: "Right - PDF", "Right - Split" "Bottom- Split" or "Bottom - PDF", click on the open PDF icon:

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			U					Abstract From 2001 to 2004 Education Queensland understook significant literacy reform in schools through the Literate Patares Project. Research into the impact of this reform has revealed that significant demands were placed on women at all	
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<u> Diabetes ma</u>	1							were driven by a commitment to a collaborative approach to professional learning that addressed equity and improving educational outcomes for all students. But what was the cost of this commitment to the project? Failure to acknowledge the emotion	,
								work demanded by educational reform effectively silences women and the signif- icant contribution they make. This paper examining a 21st century literacy reform	'open
FIND FULL TEXT								draws on the work of Fraser and Boler to argue for gender justice and acknowl- edgement of emotion work.	PDF'
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**Note:** if you attach Word or Excel files, please be aware that EndNote makes a copy of the original file and adds it to the .Data folder. Any changes made to the original file will not be saved to the copy in the .Data folder. **Do not** attach files that you haven't finished modifying.

**Note:** To open a PDF outside EndNote's PDF viewer, choose Option+Command+P and the PDF will open in whichever viewer is set as the default on the computer.

#### To manually import a PDF file:

- 1. Open the library into which you want to import the references.
- 2. From the File menu, choose Import

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- 3. Locate the file you want to import.
- 4. Select the *PDF file or Folder* import option from the Import Option list.
- 6. Select an option from the *Duplicates* list:
  - Import All: Imports all references, including duplicates.

- Discard Duplicates: Imports all references except duplicates.
- Import into Duplicates Library: Duplicate references are imported into a library called File-Dupl.enl, where "File" is the name of the library into which you are importing.

7. Choose a *Text Translation* option. The default value is *No Translation*. There is no need to change this.

8. Click Import to import the file.

**Note:** When the import is complete, the new record is stored in the Imported References group, and will include bibliographic information given for the Digital Object Identifier (DOI) mined from the PDF file such as title, author, volume, issue, page, year, and DOI.

This is a perfect time to add a keyword to the imported reference or to peruse the imported data to make sure it imported as expected. Make sure to check references that contain extended characters (extended characters are any special characters, including characters with diacritics, and Greek, mathematical, or typographical symbols).

#### To manually import a folder of PDF files:

- 1. Open the library into which you want to import the references.
- 2. 2. From the File menu, choose Import
- 3. Locate the folder you want to import.
- 4. Select the *PDF file or Folder* import option from the Import Option list.
- 5. Select an option from the *Duplicates* list:
  - Import All: Imports all references, including duplicates.
  - Discard Duplicates: Imports all references except duplicates.
  - *Import into Duplicates Library:* Duplicate references are imported into a library called File-Dupl.enl, where "File" is the name of the library into which you are importing.
- 6. Choose a *Text Translation* option. The default value is *No Translation*. There is no need to change this.
- 7. Click **Import** to import the files in the selected folders.

Hake sure to check references that contain extended characters (extended characters are any special characters, including characters with diacritics, and Greek, mathematical, or typographical symbols.)

#### Importing PDF Files and/or Folders to Create New References

This feature allows you to convert existing collections of PDF files into EndNote references with minimal typing.

You can import PDFs one file at a time, or you can import an entire folder of PDFs at once.

Note:

1. This function will only work for some PDFs with the DOI number in the document or the document's metadata. It cannot import data from scanned PDFs or PDFs without the DOI.

- 2. When EndNote is unable to locate the reference data, it will create a blank record with the PDF attached and the file name in the Title field.
- 3. When importing data using this method the PDF is automatically attached to the record.
- 4. When performing the import function, if there are two DOIs found in the first two pages of a PDF document, EndNote will put both DOIs in the DOI field. The PDF is then attached and the file name is put in the Title field.

#### Auto-import of PDFs and EndNote groups

EndNote allows a range of methods to import PDFs, automatically importing, naming and sorting the records.

- Go to EndNote X7 > Preferences and click on PDF handling from the left hand frame
- 2. Choose the auto renaming convention that you would like to apply and then click Save
- 3. This screen also gives the option of choosing to enable an auto import from a specific folder. This means that any new pdf that is added to that folder will automatically be imported into your chosen EndNote Library.

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Term Lists URLs & Links	PDF Auto Import Folder

#### **Using Find Full text function to import PDFs**

Many online sources now supply both bibliographic information and full text of the document you are referencing. EndNote can locate full text files on the Internet using the data in your EndNote records. You can do this for a single record or up to 250 records at a time.

You must first set up EndNote to authenticate your CSU access

- 1. Select EndNote X7 > Preferences > Find Full Text
- 2. Select the check box to enable OpenURL
- 3. Replace the existing text in the OpenURL Path with: <u>http://sfx.unilinc.edu.au:/csu</u>
- 4. Replace the text in the Authenticate with: URL: <u>http://ezproxy.csu.edu.au/login?url=</u>
- 5. Click OK

Change Case Display Fields Display Fonts Duplicates Find Full Text Folder Locations Formatting Libraries PDF Handling Read / Unread Reference Types Sorting Sync Temporary Citations Termporary Citations URLs & Links	The Find Full Text feature uses several technologies to maximize the chances that EndNote will find all available PDFs. Use this screen to control these full text search options. Web of Knowledge Full Text Links DOI (Digital Object Identifier) PubMed LinkOut (U.S. National Library of Medicine) OpenURL OpenURL Path: http://demo.exlibrisgroup.com:9003/demo/ Authenticate with: URL: http://ezproxy.csu.edu.au/login?url= Examples: https://login.ezproxy.library.myuniversity.edu/login http://auth.universityname.edu/authentication dutomatically invoke Find Full Text on newly-imported references
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From here there are two methods you can use to locate full text.

#### Using the DOI in the record to Find Full text

This will automatically attach the full text, if found, to your EndNote record

1. Select the required record(s)

#### 2. Select References > Find Full Text > Find Full Text

EndNote provides a progress indicator at the bottom of the Library column:



#### Linking to the record in the Library's databases to download the PDF

Locating full text copies of journal articles listed in your EndNote library:

1. Select the required record(s)

#### 2. Select References > URL > OpenURL Link

Off-campus users will be prompted for a current CSU username and password; be presented with a list of SFX services and prompted to click Continue.

#### Updating References with missing content

Sometimes, imported references will come into your library with vital sections of the reference missing. For example, a journal article may be imported without the Volume, Issue and page numbers entered. EndNote can often populate the reference with a click of a button

- 1. Find the reference in your Library that has missing details
- 2. Double click on the reference to open the Reference in a new window



- Click on the Find References Update button at the top right of the reference:
   You'll be shown a possible record (on the left) that matches your existing record (on
- You'll be shown a possible record (on the left) that matches your existing record (on the right)

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Volume 31		Volume 31
Issue 12		lissue 12
Pages 1791-802		Pages 1791-1802
Start Page		Start Page
Epub Date 2008/09/03		Epub Date
?) Skip		Cancel Save Updates

5. You can choose to Update all fields, or Update empty fields You can also manually copy & paste text from the potential record into your existing record in this window. When you're happy, click on Save Updates

#### **Regular Backups**

We recommend that you back up your EndNote library and directories of research materials **regularly**, to a source other than your computer's hard drive.

## Looking At Your Library

When you have transferred your records, you see the **Library window**. The newly imported references are displayed.

The menu bar:

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- > The **File** dropdown menu allows you to open, close, save and create EndNote libraries.
- > The **Edit** menu:
  - Cut, copy and select references.
  - Define the output styles that format the display of references.
  - The Preferences option allows you to configure the software to your needs.

> The References menu:

- create, edit and delete references
- custom sort references
- You can also work with URLs (online files) and file attachments
- The Groups menu:
  - create groups, smart groups or group sets

- add references to groups
- hide groups

#### **Display Modes and Layout Options**

#### **Display Modes**

Depending on the mode chosen, the panel either hides or shows particular Groups. Users choose the active mode by selecting one of the three toolbar controls:

- Local
- Online (Temporary Library)
- Integrated



These toolbar icons remain depressed when clicked, indicating the current mode. The leftmost button is for local mode, the middle is for online mode, and the rightmost is for integrated mode.

The default mode when EndNote is installed is Local. However if the user then selects one of the other modes, EndNote will remember that choice when it is shut down, and it will reopen in Local mode. Library windows never open up directly in Online mode.

**Local Library** mode hides the online groups and displays only those groups containing references found in the user's library.

**Online Search** mode presents only the Online Search groups, in addition to the Online References and Online Trash auto-groups. All the references found in these groups are located in a temporary database, separate from the user's library, but displayed in the normal library window. In Online mode, users can search and download references from remote databases without affecting their own library. To copy any required references to their permanent library they must select those references and use the **References** > **Copy References To** command.

In the **Integrated** mode, all groups appear in the Groups Pane, including the Online Search groups. When performing an online search, results are downloaded directly into the user's library and added to the All References group (i.e. the complete EndNote library).

#### Layout options

The Layout options appear at the top right hand side of the screen

	]▼ Q▼ Search Library
	Show Search
-	Hide Groups
	Bottom - PDF
	Bottom – Split
	Bottom – Preview
	Right - PDF
	Right - Split
1	Right - Preview
	References Only

There are seven different layout options:

- 1. Three of the options are combinations of the reference library above and various combinations below the library – known as the "bottom view" 2. Three of the viewing options are combinations of the reference library on the
- left and various options on the right known as the "right view"
- 3. The other viewing option shows only the reference library

#### **Examples of layout views**

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							however, clinical evidence suggests that individual trajectories can vary. The aim of this study was to examine patterns and predictors
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#### Selecting and Opening a Reference

If you want to work with a reference, you must first select it. You can then view its contents, copy, cut, delete, or edit it.

To select a record, you can:

- Click on the reference using the mouse
- Use the arrow keys
- Type the first few letters of the field by which the library has been sorted.

You can then double click on the selected record to open it or drag the selected item to a group, or add a pdf.

You may need to edit some of the fields. Typical transfer issues include:

- Title field: all titles in all capital letters, or coding instead of punctuation.
  Reference type: may show 'Generic' instead of a Newspaper or Journal
- article. It won't look right in your bibliography.
- Keywords: you may need to press the *Enter* key after each keyword to put them on separate lines, so that EndNote will recognise each separate keyword.

At this stage you can also:

- Check the notes field and delete any information you do not require.
- Manually add useful information such as the viewing date, database name and vendor
- Drag any new records to relevant groups.
- Download your pdfs and drag them to the relevant records

**Close a record** by using the **Cmd**  $(\mathbb{H}) + W$  shortcut, or by clicking on the Close button in the left corner of the grey toolbar.

To go back to showing all the references, click on 'All references' in the Groups window.

# *Creating Groups, Groups from Groups and Group Sets*

#### Creating a new group

Groups make it easy to break a large library into subsets for later viewing. A group simply points to a subset of references that already exist in the library. Custom groups are created by you to help organise the library

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Industrial relations (1)	
Travel (1)	

- 1. Click on the **Groups** drop down menu
- 2. Click on Create group
- 3. Give the new group a name.
- 4. Click on "All references" to see the contents of the library.
- 5. You can now click on any reference in the main screen and drag it to a group name to add it the group. You can also hold down the ℜ key to select and drag several references at once.
- 6. Click on the group name to see which references have been added.

EndNote automatically generates a permanent group for *All References*, and temporary groups for *Search Results*, and *Trash*.

You can add a reference to a particular group only once. However, you can add that reference to any number of groups.

**Note:** There is no obvious change when you have added the reference to the group, except for the number that appears next to the group.

Deleting a reference from a custom group does not delete it from the library. It removes the reference from the group subset, but the reference still exists in the library.

Deleting a reference from a library also deletes it from all groups in that library.

**Tip:** Create a group to collect any imported items that you do not currently have in print or electronic full text in your research collection. This will make it easier to identify items that need to be obtained.

#### **Creating group sets**

Another method of creating groups with subgroups is to use the 'Group Sets' option. To use this option, you:

- 1. Create your groups first as per normal
- 2. Create and name your Group Set (the group set option is also under the groups menu in the top menu bar)
- 3. Drag the groups you want to include into your Group Set, which appears in alphabetical order under the 'My Groups' area.
- 4. The groups you include will disappear from the 'My Groups' area and will now be listed under the Group Set

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#### **Creating groups from Groups**

In EndNote X7 you can create a new group from any combination of two or more existing groups. This is one method of creating more complex groupings with subgroups. This can also be used to create a new group from the overlap of two or more groups. Finally, you can use this option to create a new group based on one group, minus the references that are held in common with another group.

To do this, EndNote uses the Boolean operators, AND, OR and NOT.

- 1. The AND operator will create a new group based on the records that are common to each existing group selected (only those records that are common to both).
- 2. Groups created using the OR modifier will include all of the references in each group selected.
- 3. Groups created using the NOT modifier will include references from one group minus any references that are held in common with another group.

To create a group that includes all of the references in two or more groups

- 1. Right-click in the Groups area (or look under the Groups option in the top menu bar) and select 'Create from Groups...'
- 2. Give the new group a name
- 3. Select the first group you want to include
- 4. Select OR as the operator to combine the groups
- 5. Select the other groups you would like to include
- 6. Click on the 'Create' button

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#### **Smart groups**

Smart groups are built with search strategies that you wish to run in the background, gathering any added references that meet with your search strategy.

- 1. Click on the **Groups** dropdown menu
- 2. Click on Create smart group to set up your custom search strategy
- 3. You can search for authors, keywords, appearance in any field, date ranges or other requirements.

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- 4. Click on **Create**. This will create the new group and find any relevant references already in your library. When you add more references to the library, the smart group will collect any that match your search strategy.
- 5. The new group is listed in the Smart Groups pane as **New Smart Group**. Click to select it.
- 6. Use the Groups menu to rename it.

#### Working with your PDFs in EndNote

#### **Viewing PDFs in EndNote**

This feature in EndNote X7 allows you to view, annotate and highlight PDF files that are linked to your EndNote library. You can also perform those functions via the toolbar in the PDF preview window:



To launch EndNote's PDF viewer click on the 'Open PDF' button:

#### Highlighting and Annotating PDFs with EndNote's PDF Viewer

To make annotations with a PDF, click on the annotations icon:

This displays an annotations toolbar:



To highlight part of the PDF, select the sections of text that you wish to highlight (\*please note – only text based PDFs can be highlighted, not scanned documents).

Then click on the 'Highlight Text' button:

You can also add annotations by using sticky notes:

#### Searching within attached PDFs

This feature allows you to search through the text in attached PDF files. To use this feature, the attached files must be text-based PDFs, not scanned documents.

You can choose to search through all the fields in your citations along with the attached PDFs, or you can choose to restrict your search to only the attached PDF files.

#### Searching Any Field + PDF

To search all fields and attached PDF files in your selected reference list

- 1. Go to the Search library option
- 2. Select Any Field + PDF from the drop down Field list.

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- 3. Choose an item from the Comparison list to indicate how the search term(s) should relate to the search.
- 4. Enter the search term(s) that you want to locate. For example, you can enter a single term or a string of terms
- 5. Click the Search button. By default, EndNote ignores capitalization when searching for text. For example, a search for the text hospital also finds Hospital. If you enter a phrase, EndNote will retrieve references that contain the words you entered in any field or in a PDF document. The words will appear together if they are in any EndNote field, and may or may not appear together in the PDF file. For example the query, hospital care retrieves references containing hospital care in the EndNote fields or hospital and/or care anywhere in a PDF file. Quotation marks (" ") in a search using Any Field + PDF will be searched as characters.

**Note:** Match Case and Match Word rules apply when these options are selected.

#### To search within a specific PDF

To search PDF files attached to your references:

- 1. Select *PDF* from the Field list to restrict your search to just PDF files.
- 2. Choose an item from the Comparison list to indicate how the search term(s) should relate to the PDF search.
- 3. Enter the search term(s) that you want to locate. For example, you can enter a single term or a phrase.
- 4. Click the Search button. By default, EndNote ignores capitalisation when searching for text. For example, a search for the text *hospital* also finds *Hospital*. If you enter a phrase, EndNote will retrieve references that contain either term. For example, the query *hospital care* retrieves references in which the term *hospital* and/or *care* appears anywhere in the PDF file. To search for an exact phrase, enclose the phrase in quotation marks. For example, the query "hospital care" will retrieve records that contain this exact phrase.

#### Using EndNote's record numbers to file printed documents

By default, EndNote displays 10 columns of information about each record:

- Whether a citation has been opened and read
- a paperclip symbol indicating a PDF attached to the record
- the first author's name
- publication year
- title
- rating
- journal
- reference type
- URL
- Last updated

If you have extensive collections of printed documents, you may want to file them by EndNote record number for easy access. You will therefore need the record number to be displayed in the summary screen.

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	Column 10:	Last Updated	\$	Last Updated
	library window.	e 'Figure' and 'File Attachments' uthors in the Author field.	fields	will display an icon in the

- 1. Click on the Edit dropdown menu
- 2. Click on **Preferences**
- 3. Click on **Display Fields**, from the list on the left side of the preferences window
- 4. We recommend you change column 6 or 8, whichever you are least likely to need.
- 5. Click on the dropdown menu for that column
- 6. Scroll up and select **Record Number** from the list of fields
- 7. You can rename the heading on any column by typing your preferred words into the Heading text box. Change the header to 'Record number'
- 8. If you wish to display fewer columns, you can change the unwanted columns to **unused**
- 9. Click on **OK** to save your changes, or the **EndNote Defaults** button to reset the display to the original settings
- 10. Click on your preferred column to sort the order
- 11. Once you have set the desired display fields, you can adjust the column widths by dragging the bar between column headings.

## Part 2 – Using EndNote When You Write

### Using EndNote with Word (Cite While You Write)

Now that you have some records in your library, Word and EndNote can work together so that you can create a Word document with correctly formatted citations and a bibliography.

When the programs are working together, you will be able to create a correctly formatted document with in-text citations and a bibliography, such as in the following example.

The high rate of marriage breakdowns in Australia results in personal, family and community consequences and costs. Bender and Fuller's research (1994) confirmed stable and satisfying marriages contribute to men's and women's improved physical and psychological health, their financial condition and children's wellbeing. However, these protective benefits of marriage occur only in families where there aren't major conflicts or mental health problems in a spouse (Australian Bureau of Statistics 2005; Relationships Australia 2003). Among the most frequently asked questions are: Why do marriages break down? What are the reasons for divorce? How can extended family relationships be maintained in the event of divorce?

Australian Bureau of Statistics 2005, *Divorces, Australia (data cube),,* cat. no. 3307.0.55.001, ABS. Viewed 26th January 2008, http://www.abs.gov.au/AUSSTATS/
 Bender, W N & Fuller, L 1994 'Victimization of non-custodial parents, grandparents, and children', *Journal of Divorce & Remarriage*, vol. 21, no. 3, pp. 81-114.
 Relationships Australia 2003, *The Rest: Mental Health*, viewed 21st January 2008, <a href="http://www.relationships.com.au/what-we-do/policy-research/the-rest-relationships-statistics/">http://www.abs.gov.au/AUSSTATS/</a>

When you install EndNote onto your computer, it automatically adds the necessary EndNote tab to the tools in your Word 2008 or Word 2011 software. You will also have a floating toolbar incorporated into your word templates:

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#### Inserting Citations into the Text

- 1. Open the EndNote library that contains the references you wish to cite.
- 2. Open the document into which you would like to insert citations
- 3. Select the **Citations** option from the floating toolbar
- 4. Click on Insert Citation and select Find Citation

Author	▲ Year	Title
Akhrass	2010	Evolving trends in insulin delivery: in
Hilliard		Predictors of Deteriorations in Diabet
Jones	2009	Vital Diabetes Management
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5. Type an author's last name, keyword or year into the 'Search for' box.

#### 6. Click on Search

EndNote compares the identifying text to your EndNote references and lists the matching references. When multiple references match the search, they are listed so you can identify, highlight, and insert the appropriate reference.

- 7. Click on the required reference to select it.
- 8. If several papers might be relevant for an in-text citation, hold down the key and select on the references you wish to cite.
- 9. Click on **Insert**. A single reference will be inserted into the text within its own bracket; multiple references will be inserted into a bracket, sorted according to your chosen output style, which will be discussed later.

**Note**: The first time that you insert a citation in a document the program may appear to 'hang'. This problem does not occur for all users, and there is no progress indicator to suggest that the computer is busy. Subsequent citations will be inserted almost instantly.
10. Once the list of references has been generated, the in-text citation will list the papers in an order specified by your output style.



## **Removing Citations – Very Important!**

**DO NOT delete unwanted citations by highlighting them and pressing the delete key**. While doing so does remove the unwanted citation's text, it may leave the entry in your list of references and more importantly, some of the 'hidden' coding that allows EndNote and Word to work together. This orphaned code can cause all sorts of problems later, including citations appearing out of order, and can be hard to correct.

If you wish to remove a citation completely:

- 1. Select Citations option from the floating toolbar
- 2. Choose the Edit and manage citation(s)
- 3. The **Edit citation** dialogue box will be displayed. All the citations within the document will be listed on the left portion of the screen. Make sure the citation you want to delete is highlighted.
- 4. Click on the '**Remove citation**' option under the *(\*)* option:

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Totals: 1 Citation Group, 1 (	Citation, 1 Reference			

5. Click on OK

## Adding text and pagination

You may wish to modify citations to add pagination details, "see also" references, or remove the author from the citation bracket.

The following modifications are available:

Sample citation	Bender's discovery (Bender, 1994)
Exclude author	hide the author name, and only show the date e.g. Bender's discovery (1994)
Exclude year	hide the publication date, and only show the author name e.g. the 1994 discovery (Bender)
Prefix	add preceding text, such as "Cited in " <b>Make sure you</b> <b>leave a space</b> <u>after</u> the text e.g. the discovery (as cited in Bender, 1994) e.g. the discovery (see Bender, 1994)
Suffix	adds following text. <b>Make sure you include a space</b> <u><b>before</b></u> <b>the text</b> eg. the discovery (Bender, 1994 is a prime example)
Pages	adds page number(s) eg. (Bender, 1994, p.4)

To hide the author or publication year of a single citation:

- 1. Right click on the in-text citation. A dropdown menu will appear
- 2. Click on Edit citation
- 3. Make the required changes

To customise a formatted citation:

- 1. Select **Citations** option from the floating toolbar
- 2. Choose the Edit and manage citation(s)
- 3. The **Edit citation** dialogue box will be displayed. All the citations within the document will be listed on the left portion of the screen. Make sure the citation you want to customise is highlighted

000	E	ndNote X7 Edit &	Manage Citati	ions	
Citation			Library		
		olan, & Hood, 201 16 1		1 th annual	(*-)
<u>ः ः ः म</u>	lliard, 2013 #:	16 1	My EndNote	Library	* •
		Edit Citation	Reference	]	
Format:	Default	4	]		
Prefix:			-		
Prenx:					
Suffix:					
Pages:					
? 🔅				Cancel	ОК
Totals: 1 Cita	ation Group, 1 C	tation, 1 Reference			

- 4. Customise the citation as required by using the prefix, suffix and/or pages boxes.
- 5. Click on **OK** to make the changes

## Formatting a Bibliography (created with EndNote) in Word

To change the output style in your bibliography:

- 1. Click on **Bibliography** in the floating toolbar
- 2. Click on Configure Bibliography
- 3. Click on the drop-down menu next to 'With output style:'
- 4. Select a different output style
- 5. Click on **OK**

Format docum	ent: Thesis.docx 🗘
With output st	yle: APA 6th 🛟 Browse
Temporary citat	tion delimiters
Left: {	Right: }
Link in-text	t citations to references in the bibliography
	e linked in-text citations

Theses often require the references to be double spaced. There is no need to change the output style. You can make this change while formatting your bibliography.

1. Open your Word document

- 2. Click on Bibliography in the floating toolbar
- 3. Click on Configure Bibliography
- 4. Click on the Layout tab
- 5. In the box labelled 'Line spacing' select the 'Double' option
- 6. Click on the **OK** button

## Creating Subheadings for your Reference List

The EndNote plug-in within Word allows you to organise your Reference list with subheadings. You can display references in groups by reference type or with your own headings

	References
Books	
Burton,	S. L., Alvarez, J., Cardany, A. B., Cecconi-Roberts, L., Cooper, S., Dansereau, D., et al. (2011 Learning from young children : Research in early childhood music. Lanham: R&L Education
Confere	ence papers
	R. (2012). What the library did next: strengthening our visibility in research support. VALA2012, Sydney, retrieved from <u>http://hdl.handle.net/1959.3/214486</u>
Journal	5
Asche, I	<ul> <li>i, F., Ahmetaj, B., &amp; Leiper, J. (2010). The Biology and Therapeutic Potential of the DDAH/ADMA Pathway. <i>Current Pharmaceutical Design</i>, <i>16</i>(37), 4089-4102.</li> <li>F., Bennear, L. S., Oglend, A., &amp; Smith, M. D. (2012). U.S. Shrimp Market Integration. <i>Marir Resource Economics</i>, <i>27</i>(2), 181-192.</li> <li>C., &amp; Smith, K. L. (1998). Exploring the Potential of Problem-Based Learning in Nurse Education. <i>Nurse Education Today</i>, <i>18</i>(5), 353-361.</li> </ul>

Bruce, T. (2011). Early childhood education. Milton park, Abingdon, Oxon.: Hodder Education. Burns, M. S., Assaf, M. M., & Johnson, R. T. (2012). Preschool education in today's world: teaching children with diverse backgrounds and abilities. Baltimore: Paul H. Brookes. Desailly, J. (2012). Creativity in the primary classroom. London: SAGE.

References

#### Higher Education

Early Childhood

Bicen, H., Ozdamli, F., & Uzunboylu, H. (2012). Online and blended learning approach on instructional multimedia development courses in teacher education. *Interactive Learning Environments*, 1-20. doi:10.1080/10494820.2012.682586

Keengwe, J., & Kidd, T. T. (2010). Towards Best Practices in Online Learning and Teaching in Higher Education. *Journal of Online Learning and Teaching, 6*(2).

#### Library

Booth, M., Schofield, S., & Tiffen, B. (2012). Change and our future at UTS Library: It's not just about technology. [Article]. *Australian Academic & Research Libraries, 43*(1), 32-45.

Cox, B. C., & Jantti, M. (2012). Discovering the Impact of Library Use and Student Performance, *Educause Review Online*. Retrieved from <u>http://www.educause.edu/ero/article/discovering-impact-library-use-and-student-performance</u>

Parker, R. (2012). What the library did next: strengthening our visibility in research support. VALA2012, Sydney, retrieved from <u>http://hdl.handle.net/1959.3/214486</u>

## **Configure your Reference list to display headings**

Under Categorize References in your floating toolbar: 1. Select Group References by Custom Categories



## 2. Click on Configure Categories to input

the headings you

2006Evaluating train Journal ArticlePrimary So2011Diagnosing cer Journal ArticleSecondary2006Publisher and a Journal ArticlePublishing
2006 Publisher and a Journal Article Publishing
Fype: Journal Article Iazzi, John J. cole A. her and author partnerships: a changing landscape Irned Publishing •192 www.ingentaconnect.com/content/alpsp/lp/ 2019/00000003/art00005
Cancel OK
ia co h in -1

- 3. Add category headings by clicking on
- 4. Drop and drag the references into the appropriate headings
- 5. You can arrange the order of the headings by dragging them to the appropriate position in the list
- 6. References not placed in a category will appear in the Uncategorized section of the reference list

## **Output Styles**

An output style determines how the selected reference will be formatted and displayed when you print, export, preview and create in-text citations or footnote citations and bibliographies for all types of references.

EndNote<sup>™</sup> includes APA 6th, Harvard, Chicago B, and individual publication-specific styles such as Nature. More styles can be downloaded from the EndNote<sup>™</sup> website at <u>http://www.EndNote<sup>™</sup> .com/support/enstyles.asp</u>

## To Activate a Different Style

The three default styles (Annotated, Numbered, and Show All Fields) are not appropriate for Charles Sturt University requirements and you will need to select another style. Most Schools at CSU have adopted the APA 6th edition. Please check the required style for your School or Faculty with your lecturer. For more information on referencing see: <u>http://student.csu.edu.au/study/referencing-at-csu</u>

- 1. Click on the **Current Style** drop down menu. **Note:** You must be in the bottom view (as shown) or in the Right view for the current style to be visible)
- 2. Click on Select another style
- 3. Scroll down the list alphabetically by name, or by category.
- 4. If you wish to search by category, click on the grey category title bar or click on the **Find** button underneath the list
- 5. Click on the name of the required output styles to select them.
- 6. Click on Choose



If you wish to add another style, repeat steps 2-6.

## To Remove a Selected Style:

- 1. Select the style in the Current Style drop down menu.
- 2. Click on the **Edit** drop down menu.
- 3. Click on Open style manager
- 4. The alphabetic list should open at the selected style. Click on the ticked box next to your style to remove it from your list.
- 5. Click on the close box for the style manager window. The style should no longer appear in the Current Style drop down menu.

## Activate a style within Word

To choose a different referencing style within Word, click on the dropdown button on your floating toolbar.



If your referencing style is not in the default list, click on Select another style and you can choose the appropriate style from the list.

## Downloading, Saving and Opening Additional Styles

You can download additional output styles for EndNote X7 from the Thomson Reuters support site for EndNote by clicking on the 'Help' menu at the top of the EndNote screen and selecting 'Web Styles Finder...'. You can then search for the style you need on the Thomson website at <u>http://www.EndNote™</u>..com/support/enstyles.asp.

To install and use a style:

- 1. Locate the style you want using the EndNote 'Web Styles Finder' by either browsing through the list or searching for the style by publication name.
- 2. Click on the 'Download' link to the right of the style.

Style or Journal Name	Citation Styl	e	Pu	blisher	
Contains \$	Is one of	\$		Contains	\$
	- Any -		\$		
				AP	PLY RESET
Style or Journal Name		Citation Style	Disciplin	ne Date∨	
Pharmacogenetics & Genomics		Non-superscripted Number	Pharmac	cology 2014- 01-16	DOWNLOAD
Open Education Journal		Author-Year	Educatio	n 2014- 01-16	DOWNLOAD
Open Economics Journal		Author-Year	Economi	cs 2014- 01-16	DOWNLOAD
Clinical Trials		Superscripted Number	Medicine	2014- 01-16	DOWNLOAD
Open Diabetes Journal		Author-Year	Endocrin	ology 2014- 01-16	DOWNLOAD
Current Genomics		Author-Year	Biotechn	ology 2014-	DOWNLOAD

USE THE STYLE FINDER BELOW TO SEARCH FOR A STYLE NAME AND/OR CITATION STYLE AND/OR PUBLISHER.

- 3. Save this file somewhere on your computer (the desktop is a good location as files are easy to find there).
- 4. Double-click on the file (this should open the file in EndNote).
- 5. Click on 'File', 'Save As' in EndNote.

- 6. Remove the word 'Copy' from the end of the style name and click on the 'Save' button. EndNote will save the file in the appropriate folder.
- 7. To use the referencing style, click on the drop-down arrow next to the style window in EndNote and click on 'Select Another Style'.
- 8. Once the style manager opens, navigate to the new style and double click it to select it as the active style in your library.

## **Editing Output Styles**

Sometimes, an existing output style does not meet your publishing needs, so you may need to edit an existing style or create a new output style.

## To edit an existing style

1. Select the output style in the menu



2. Click on Edit > Output Styles > Edit 'Your selected style'



3. The window that opens contains the display settings for Citations, References and Footnotes for this style

## **Editing In-text Citation display**

There are many different settings you can change, including how to display

- changing the punctuation of the in-text citations Templates
- different items by the same author, publishing in the same year Ambiguous Citations
- listing authors when there are more than one for a reference Author Lists
- sorting the citations when listed together in brackets Sort Order

## **Editing Author display**

You can also choose to change the way the author is displayed, you may wish to display the author's surname and initials rather than just the surname.

1. Select Author Name in the Citations menu



2. In the drop down menu next to Initials, select the option you wish to display



- 3. Save the changes by clicking on File > Save
- 4. To update the citations in your Word document to show the changes you have made to the output style, you will need to click on "Update Citations and Bibliography" on the EndNote toolbar in Word

## **Editing Bibliography display**

There are many different settings you can change, including how to display

- different items by the same author, publishing in the same year Ambiguous Citations
- sorting the order of the references in the bibliography Sort Order
- listing authors when there are more than one for a reference Author Lists
- how an author is displayed Author Name
- listing editors when there are more than one for a reference Editor Lists
- how an editor is displayed Editor Name
- how the titles should be capitalised Title Capitalization

## **Editing templates**

You can also choose how the references are punctuated and displayed for each reference type, including what headings are included from the record.

1. Select Templates in the Bibliography menu



- 2. To add a reference type select it from the Reference Type button at the top of the screen
- 3. **To alter the format** Highlight the text & use Formatting buttons above the In-Text Citations window
- 4. To alter punctuation type or delete punctuation as required

EndNote uses special characters or 'fields' to control how a record appears in the bibliography. Place your cursor where you want the character in the template. Go to '**Insert Field**' on the top right and select the appropriate character:

- **Singular/plural (^ caret symbol)** used if there is different text for singular/plural forms e.g. (Ed.),^(Eds.)
- Link adjacent text a non-breaking space (shown as a small grey diamond in the template) used to link adjacent text to a field so text doesn't appear if the field is empty
- Forced separation (| pipe symbol) used to separate punctuation from adjacent fields. e.g. you might want a full stop at the end no matter what fields are empty
- Field names as literal text (`back apostrophe symbol) used if you want text in your records that has already been used as a field name e.g. if you want the word 'year' as well as the field year
- To remove a field Highlight > click Delete on your keyboard

Remember to save the output style as you go.

**TIP!** You can also rename your output style to identify it from an existing one by clicking on File > Save As.

**TIP!** It is a good idea to test your output style on a test word document.

## Abbreviated Journal Titles and EndNote Term Lists

EndNote provides a number of terms list to ensure that the journal names in your bibliography are either the full name or abbreviation according to your required output style. To set up your terms list, first make a backup of your library. Then, follow the steps below.

- 1. In EndNote, go to "Tools > Open Term Lists > Journal Terms List".
- 2. Highlight the first journal term, and select [Ctrl]+A to select all, ([Command]+A on a Macintosh
- 3. Note: If the Journal Terms List is empty, skip to step 4.
- 4. Next, select "Delete Term" to delete all old terms.
- 5. Go to the "Lists" tab at the top, and select the "Import List" button.
- 6. Browse to the Term Lists folder within the EndNote folder, and choose to open the file according to your required journals.
  - For a Windows machine, this folder should default to: C:\Program Files\EndNote (EndNote Version Number)\Term List
  - or on a 64-bit Windows machine, this folder should default to:
     C:\Program Files (X86)\EndNote (EndNote Version Number)\Term Lists
  - On a Mac, this folder should default to: Hard Drive: Applications: EndNote (EndNote Version Number): Terms
- 7. This will import the correct abbreviations into your library's term list.
- Next, to select the correct substitution, go to "Edit > Output Styles > Open Style Manager".
- 9. Highlight the style you are using and select "Edit".
- 10. Select "Journal Names" on the left.
- 11. Using a new document, test that the style is using the Full Name or one of the Abbreviations as needed.

# Adding a Simple Bibliography to an Existing Word Document.

At the EndNote Reference List screen:

- Select the output style you wish to use from the Current Style box e.g. APA 6th
- 2. Select the references
- 3. For multiple references, use Cmd (**#)** and click with your mouse
- 4. For a block of references, use Shift and click with your mouse
- 5. For all references, click on the Edit menu and click on Select All
- 6. Click on the Edit dropdown menu
- 7. Select Copy formatted or press Cmd (#)+ K
- 8. Open the Word document
- 9. Use the Cmd(**#)**+ V command to paste the references or
- 10. Click on the Edit menu
- 11. Click on Paste

The new document is now independent of EndNote. You can modify the information in any way, and it will not affect the EndNote library.

## Part 3 – Using EndNote on More Than One Computer

CSU's licence allows you to use EndNote on more than one computer, you can do this a couple of different ways.

## Using an External Drive to Hold you EndNote Library

- 1. Create a Research directory on a USB Flash Drive
- 2. Keep your working Word files and EndNote library in that directory.
- 3. Always use the files in the Research directory on your flash drive.

You can then copy that entire directory to another source to back it up.

Only using the files on the USB prevents accidents like over-writing the most recent library with an older one, and stops you from 'breaking' links between EndNote and Word files if you move them to different directories.

## Syncing your EndNote Library

EndNote allows you to have your Library available to you on multiple computers. You can sync your Library with EndNote's online facility, EndNote Online, and subsequently sync the library with another computer, ensuring you have the same content available in your library, including attachments, on different computers you may use to do your research and writing. This service is provided as part of the CSU EndNote subscription.

#### WARNING!

You can only sync one EndNote Library with EndNote Online. If you already have an EndNote Online account, your existing EndNote Online Library will be copied to your desktop library and your desktop EndNote library will be copied to your EndNote Online account.

## Syncing with EndNote Online

To sync with EndNote Online, you need to create an EndNote Online account. You can do this by going to the Sync Preferences in the EndNote Software

- 1. Click on Edit
- 2. Click on Preferences
- 3. Select 'Sync ' in the list on the left
- 4. If you already have an EndNote Online account, enter your details, if not, click on "Enable Sync"

Change Case Display Fields	Synchronize your data with your EndNote account. <u>Learn more</u> Upgrade or create your two-year EndNote account to
Display Fonts Duplicates	get the latest features and enable Sync.
Find Full Text Folder Locations	Enable Sync
Formatting Libraries	EndNote Account Credentials
PDF Handling	E-mail Address: sstudent@csu.edu.au
Read / Unread Reference Types Sorting	Password:
Sync	Sync this EndNote Library
Temporary Citations Term Lists	
Term Lists URLs & Links	Sync Automatically
	EndNote Defaults Revert Panel Save

- 5. You will then be asked to complete an online form, after doing so, you will have and EndNote Online account
- 6. Check that your Email address and Password are entered correctly in the Sync Preferences window

## To sync your EndNote Library:

- 1. Ensure you have your Library open and created a copy of your library that is saved separately (just in case!)
- 2. Click on Tools
- 3. Click on Sync (EndNote will prompt you at this point to create a backup of your library if you haven't already)
- 4. Your Library will now be copied across to your EndNote Online account, with any references in your EndNote Online account brought into your desktop library. This may result in duplicates in both Libraries.

00					Search Listary	ЖF	s.enl
O R B	1		0	Author	Cite While You Write Online Search Format Paper Change/Move/Copy Field	۲ ۶	N REUTERS*
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BOE	0						

7. If you have a large library, this may take a while, but you can continue working with your EndNote Library as the syncing process will occur in the background

## How to delete duplicate records after syncing with EndNote Online

If you already had an EndNote Online account, the EndNote Libraries have been copied both ways, so you may now have duplicate records in your desktop library.

To identify duplicate records in your Library (this can be done at anytime)

- 1. Select All References in the My Library pane
- 2. Click on References
- 3. Click on Find Duplicates



4. If any duplicates are found, a window will appear asking you which record to keep. At this point, click on Cancel at the top right of the window

omparing 1 and 2 of 2 duplicates.	Skip
lect the record to keep. The record not selected will be moved to the	
Keep this Record	Keep this Record
Stupiansky, 2013 #410	Stupiansky, 2013 #416
Ref Type: Journal Article	Ref Type: Journal Article
Pages 247-254	Pages 247-254
Start Page	Start Page
Epub Date	Epub Date
Date	Date
Type of Article	Type of Article
Short Title	Short Title
Alternate Journal	Alternate Journal
ISSN	ISSN
DOI 10.1093/jpepsy/jss110	DOI 10.1093/jpepsy/jss110
Original Publication Journal of Pediatric Psychology	Original Publication
Added to Library: 5/06/2013 Last Updated: 5/06/2013	Added to Library: 6/12/2013 Last Updated: 6/12/2013

5. You will now be presented with a the contents of the Duplicate Records folder with 2<sup>nd</sup> copies of the records highlighted in blue

000					References.enl			
C R R					THOMSON REUTERS	r v		Q- Search Library
My Library	Ŧ	• 0		Year		Rating	l∰ ₹	Journal Article
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EndNote x7 Ma		• 0	Stupiansky, Nathan W.; Han	2013	Impulse control, diabetes-specific self-efficacy, and diabetes manage		Autho Wolpe	ert, Howard A.
_	-	• Ø	Wolpert, Howard A.; Atakov	2013	Dietary Fat Acutely Increases Glucose Concentrations and Insulin Req		Atako	v-Castillo, Astrid
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🗑 Trash	9							
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iii evaluation	3						mana	gement
<u> i</u> issn x							Journ	
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iii rss	1						Issue	
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▼ FIND FULL TEXT							APA 6t	h \$
							Wolper	t, H. A., Atakov-Castillo, A., Smith, S. A.
								& Steil, G. M. (2013). Dietary Fat Acutel Increases Glucose Concentrations and
								Insulin Requirements in Patients With
								Type 1 Diabetes: Implications for carbohydrate-based bolus dose
								calculation and intensive diabetes
								management. Diabetes Care, 36(4),

- 6. Hit the delete key on your keyboard
- 7. Empty your Trash
- 8. To delete the duplicate records from your EndNote Online library, click on the

Sync button This will removed the deleted records from your EndNote Online library.

## Syncing your EndNote Library on a 2<sup>nd</sup> computer

These instructions assume you have already created and synced a library on another machine. Make a note of the name of the library.

- 1. Open EndNote on the second computer (Mac or Windows).
- 2. Click **File**
- 3. Click New
- 4. Create a new library with the same name as the original synced library.
- 5. Click the **Sync** button.
- 6. Type your existing EndNote Online login and password into the **EndNote Online Account Credentials** fields
- 7. Click OK

## **Sharing Records with Colleagues**

## Copy and Email Records from your EndNote Library

You can save an EndNote library or group within your Library that will to a single compressed file that will include the records and any attachments. You can then email this file a copy to a colleague who can then expand the file and import it into their own EndNote library

## **Creating a compressed Library File**

1. Open the library in EndNote.

- 2. From the *File menu*, select *Compressed Library (.enlx)* to display a Compressed Library dialog.
- 3. Use the radio buttons to determine these options:
  - Specify whether you want to *Create a compressed library* or to *Create & Email the library*. (You will need to have a built in email program to use Create & Email. If you're using Gmail or Hotmail, you will need to use Create and then attach the file manually to your outgoing email.)
  - Specify whether you want to save file attachments with the library or not.
  - Specify whether you want to save
  - all references to the compressed library,
  - only the selected (highlighted) references, or
  - only the references in a specific group or group set.
- 4. Click OK to display a file dialog.
- 5. Save the compressed library (default name is Sample\_Library\_X6.enlx) to a folder on your hard drive.

You can rename the file name but you cannot use the following characters.\, /, : , \*, ? , ", <, >, |. If you selected the Create & Email option, EndNote will launch your default email system, create a new email, and attach the compressed library file to the email. Enter additional information to the email, such as a recipient, subject, and message. Click the Send button.

## **Restoring a compressed Library File**

- 1. Save the compressed Library onto your computer your Desktop is fine.
- 2. Double click on the compressed Library icon
- 3. You will be asked where you wish to save your new EndNote files.
- 4. When the file has been restored Open EndNote.

You can now either Open the file using *File > Open > Open Library* and selecting the .enl file that was created when the compressed Library was restored.

Alternatively you can import the restored Library directly into your own EndNote Library by using *File > Import > File*. Select the .enl file that was created when the Library was restored. Make sure that you select to Import Library and decide whether you want to import duplicates. Click on Import.

<ul> <li>3m-aud304022m</li> <li>b-ilstaff-dt</li> <li>b-studcent-dt</li> <li>b-studserv-dt2</li> <li>b-stusrvcnt-dt</li> <li>All</li> </ul>	EndNote xan     EndNote Xsta     My EndNote Lib     My EndNote Lib     OWeek Lib20	aller.dmg prary.Data ⊨ brary.enl		My EndNote Library.en
EVICES Student Data Untitled AEDIA Music		п.	Kind Size Created Modified	DocumentType Zero bytes Today 11:54 AM Today 11:54 AM Today 11:54 AM
	Import Options: Duplicates: Text Translation:	EndNote Library Import All No Translation	¢) ¢	

## **Document Groups**

In addition to Groups, Groups Sets and Smart Groups, EndNote X7 also automatically creates a new group for each open document that has EndNote references in it. Document groups will show up in the group window under the 'All References' group. They are identified by a Word document icon next to the name of the document. Next to the document name the number of references used in the document is listed (see below).

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<b>∆⊕</b> ⊅		😵 🕀	Ð	?	Q- Search Library		$\supset$ (
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Dufiled	(24)						
📋 Trash	(43)						

This group is useful for sharing references in a document with colleagues as the references in the group can be copied to a new library and thus shared. To share these references with a colleague:

- 1. Select the appropriate document group
- 2. Click on a reference in the group
- 3. Click on 'Edit', 'Select All' to select all of the references in the group
- 4. Click on 'References', 'Copy References To' and select 'New Library'
- 5. Save the Library with a distinctive name (giving it the same name as the document would help identify the library)
- 6. With the new library opened, click on 'File', 'Compressed Library (.enlx)'. This will merge the data folder with the library file for easy distribution to colleagues
   EndNote X7 File Edit References Groups Tools Window Help

000	New			🚾 My EndNote Library.enl								
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7. To email the library, within the Compressed Library settings, select 'Create & Email'. You can choose to include any attached PDFs or to send only the reference data. Please note that including PDFs in your shared library may constitute a breach of Copyright law.

## Sharing Groups Using EndNote Online

EndNote Online allows users to collaborate with the Share Groups feature. You may wish to share an existing group or create a new group to share.

To access EndNote Online, go to <u>www.myEndNoteweb.com</u> and use the email address and password you used to sync your Library.

## To Create a New Group to Share:

- 1. Logon to your EndNote Online library
- 2. Click on Organize then Manage My Groups
- 3. Select New Group and name it
- 4. Select the citations you would like to add into the New Group
- 5. Click on the arrow from the drop-down Add To Group menu
- 6. Add your references to the selected group

## *How to Share a Group:*

- 1. In EndNote Online, click on Organize and then on Manage My Groups
- 2. The Manage My Groups window opens and shows the groups you have created and their status
- 3. Select the **Share** column; check the square box to the left of the group you wish to share and choose the **Manage Sharing** button
- 4. Click on start **Sharing this Group**
- 5. The add email addresses window opens; add email addresses for those you wish to share your group with
- 6. Select the button to allow the person to Read Only or Read & Write
- 7. Click Apply

When your group has been shared, it will appear in the list in EndNote Online and your desktop Library like this

Quick Search		My Library	
Search for	-	All References	36
in All My References \$	B	Search Results	8
Search			0
My References	_	Sync Status	
All My References (36) [Unfiled] (28)		Unfiled	28
Quick List (0)		Trash	
Trash (0) ▼ My Groups			
Diabetes (8) 🦨 <	▼	UNFILED GROUPS	6
		11 Diabetes	8

## Importing Records From a Colleague's Shared Group

A shared group from a colleague will appear at the bottom of your Library in EndNote Online, but will not be synced with your desktop library.

#### Groups Shared by Others

Collaboration and the Cloud (0) Z Shared (2)

To move these references into your Library

- 1. Click on the shared Group
- 2. Select the references you wish to add to your Library, you can choose All references or select specific ones
- 3. At the top of the page, select the group you wish to add the references to, it can be an existing group or a New Group

The next time your desktop EndNote Library is synced with EndNote Online, these records will be added. You will not see other's shared groups in your desktop library.

## Adding Records to a Colleague's Shared Group

To add records to a shared group from your Library

- 1. In EndNote Online, select the records you wish to share
- 2. At the top of the page, select the shared group you wish to add them to

**TIP!** Although you can share a record with a colleague, you will not be able to share attachments using this method. Alternatives - email the PDF to a colleague, or send them a compressed file of your EndNote Group with attachments included.