

EndNote 21 Fundamentals

PC VERSION

Library Learning Services

January 24 update

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Introduction

Intended Learning Outcomes

At the end of the session, participants will be able to:

- Create a new desktop library
- Populate the library with references (both manually and by importing from databases)
- Attach PDFs to references (manually and via EndNote's Find Full Text feature)
- Create group, smart groups, group sets and tag your references.
- Save and back up an EndNote library
- Use EndNote's Cite-While-You-Write feature to create in-text citations, edit citations, generate a reference list and change output styles
- Format bibliography
- Merge thesis chapters into one document

What is EndNote 21?

EndNote is a reference management tool that enables you to:

- Store your references and related files in a searchable personal library.
- Insert in-text citations from your library into Word documents and automatically build a bibliography in over 7,000 referencing styles.
- Directly import references from online bibliographic databases.

Why EndNote?

- Store up to 50,000 records in a library.
- Share your library with up to 100 people (EndNote X8 and later).
- View changes made to your library by collaborators with a built-in activity log.
- One-click find full text feature searches for full text PDFs across available databases and attaches them to library references.

Points to keep in mind

- EndNote does not replace your referencing knowledge. It's important that you check each reference is correctly formatted.
- EndNote creates a reference list from the information provided in the library, so if a reference lacks a vital piece of information, it will not appear in the reference list.

Download and Install EndNote

For La Trobe staff and students, PC and Mac versions of EndNote 21 can be downloaded from the On the Hub website. You will need to sign in using your La Trobe account details.

- [Access link](#)

Earlier versions of EndNote should be uninstalled before downloading the new version.

After installation, you can check for program updates within EndNote via the Help menu option.

EndNote Web

You may want to use your EndNote library on your work PC and personal desktop or laptop at home. You can safely use your library on multiple devices if it is saved to a portable hard drive (not a flash drive). Alternatively, you can sync a desktop library to multiple devices by using [EndNote Web](#). In this way, all references, attachments, and annotations can be accessed on each device.

Note: Only one EndNote desktop library can be synchronised to make it available online. The same library can be used on multiple devices. If you attempt to synchronise more than one desktop library, EndNote will merge them all.

To setup an EndNote Web account you will need an internet connection on your device.

For further information about EndNote Web and step by step instructions please see: LTU Expert Help Guide: <https://latrobe.libguides.com/EndNote21PC/EndNoteWeb>

Additional Resources and Help

Further learning resources are available:

- LTU EndNote 21 expert help guide: <https://latrobe.libguides.com/EndNote21PC>
 - Clarivate LibGuide: https://clarivate.libguides.com/endnote_training/home
 - Clarivate YouTube Endnote Training: <https://www.youtube.com/@EndNoteTraining>
 - Academic Referencing Tool: <https://latrobe.libguides.com/referencing-tool>
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1. Create a New EndNote library

The EndNote library consists of two files—your main library, which has an **.enl** extension, and a data folder which has a **.data** extension. The data folder is automatically created by EndNote and is stored in the same location as your library. The main function of the data folder is to store attachments. You must have the data file to open your library. **Do not delete it.**

We recommend using only one EndNote library for your research or studies and to use groups and group sets and tags to organise references for different topics and projects. This makes it easier to use EndNote as you insert citations from one library and create regular back-ups of one library.

Exercise 1. Create an EndNote library

Create a new EndNote library select **File > New** from the menu. Save the library in the Documents folder or equivalent (usually the default).

Within Word, create a new document in order to complete these practice exercises contained within this handout.

Please note: After downloaded and installing EndNote, you will have an EndNote 21 tab visible in Microsoft Word.

1.1 EndNote Desktop Layout

The fields displayed in the Library window can be customised in the EndNote preferences (**Edit > Preferences**). The size of each of the panels can be modified by clicking and dragging on a particular panel frame.

The screenshot shows the EndNote 21 desktop application window titled "EndNote 21 - My EndNote Library1.enl". The interface is divided into several panels:

- Left Panel (Navigation):** Contains a sidebar with "All References", "Recently Added", "Unfiled", "Trash", "MY GROUPS", "MY TAGS", and "FIND FULL TEXT". A red callout bubble points to the "MY TAGS" section with the text: "Use Tags to organise your references".
- Top Panel (Search):** Includes a search bar and "Advanced search" options. A red callout bubble points to the search area with the text: "Use groups to organise your assessments or chapters".
- Reference pane:** A table with columns for "Author", "Year", and "Title". A red box highlights this area with the label "Reference pane".
- Summary/edit pane:** A larger area on the right for editing references. A red box highlights this area with the text: "Summary/edit pane. Once references are populated the summary screen displays and provides the functionality to edit references. As well as display in your chosen referencing style".

2. Populating your EndNote library

Records can be added to your EndNote library by importing them from bibliographic databases or by inputting them manually.

2.1 Importing References from Bibliographic Databases

Direct import of references saves the time it would take to format and manually type the information. Be aware, however, that each database may be set up differently.

Direct import requires three basic steps:

1. Search a database for the desired references and **select the reference(s)** you want included in your library.
2. **Locate the Export, Download, or Save** option in the database. You may need to select an export method (choose RIS Format for EndNote). Some databases enable you to customise the record content.
3. **Select Send, Export, or Open** and the reference can then be added to your EndNote library. The reference will be included in the 'All References' count on the left in EndNote. It will also appear in a separate 'Imported References' group. Check that the reference is formatted correctly in EndNote.

Exercise 2. Directly importing records to EndNote library

1. From the La Trobe Library homepage under 'Databases' select 'E' and then **Emerald Insight**.
2. Authenticate, and enter "**dietary fiber role in type 2 diabetes prevention**" Locate and select (tick) the journal article checkbox.
3. Above this citation, select *download RIS*
4. The download will commence. If asked where to save, select the Downloads folder.
5. Double-click on the download from the downloads folder, and the reference should import into your library.

Note: You may be prompted with a dialogue box asking what program to use to open the reference. Set the default as EndNote.

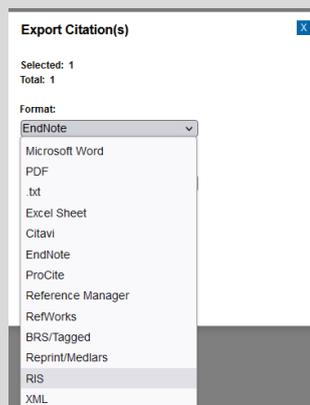
Note: If a program other than EndNote attempts to open the file, right-click on the .risfile and select the **Open With...** option. Select **Other App** (or Program) and select **EndNote** from the list.

Note: You may be prompted with a dialogue box asking **What Should Firefox do with this file?** Select *Open with ResearchSoft Direct Export Helper (default)*

6. Highlight the reference in your EndNote library (it will appear in Imported Refs and All Refs) and select Summary from the right-hand side to make sure the reference is correct and contains all required data for the selected style. If not select Edit and fix.
7. Go back to the database, select the PDF for the journal article. Save to your downloads file and attach to thereference in your EndNote file. (Refer to the **File Attachments** section for assistance.)
8. Save the reference by clicking **Save** in the Summary tab for the reference.

Exercise 3. Add multiple records from Medline

1. Ensure your EndNote Desktop library is open.
2. From the La Trobe Library homepage under Databases elect 'M' and then Medline. Authenticate, and then complete a search "diabetes mellitus"
3. Check (tick) five 5 of the articles to export into your EndNote Desktop library.
4. **Above the search results, click the Export button.**
5. Select Endnote or RIS from the dropdown



6. Click the **Export** button.
- 7.

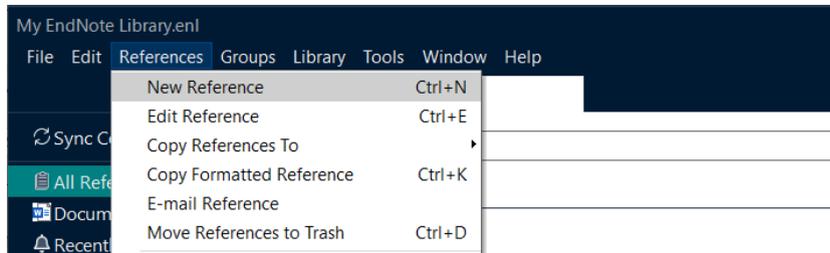
The file will appear in your Downloads folder – double click and it will import to your EndNote library.

2.2 Manual Data Entry

Records need to be input manually when they are not available in a bibliographic database (e.g. documents/information from websites or government reports).

To enter a new reference:

1. Click the **References > New Reference** from the menu.



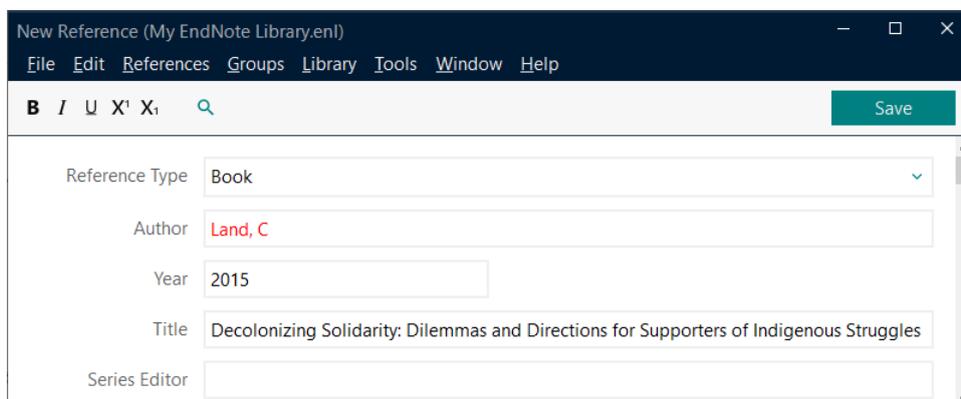
2. Select an appropriate reference type (e.g. **Journal article** or **Book**).

3. Complete the fields that are required for your preferred referencing style.

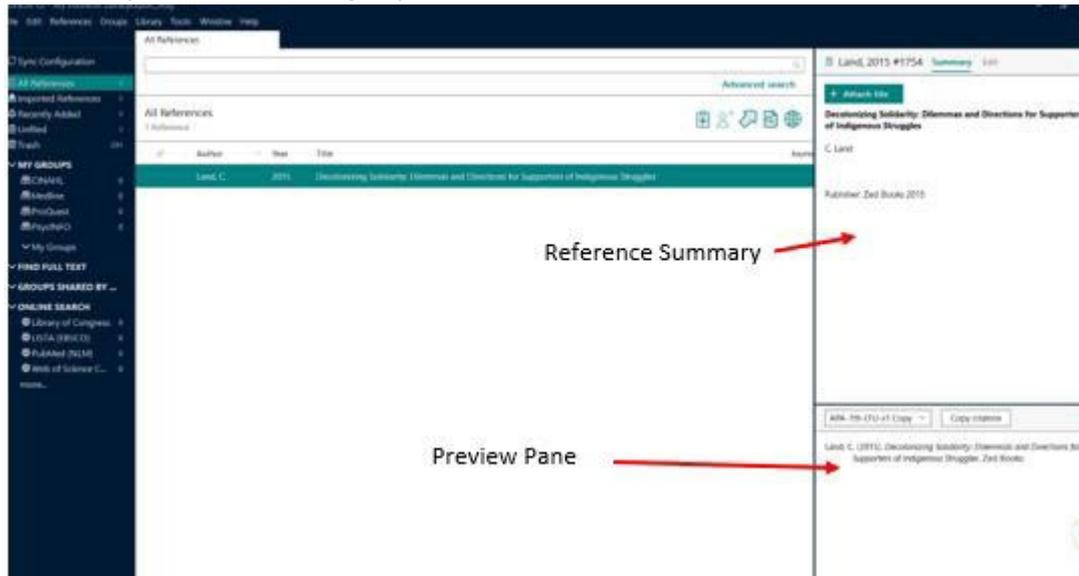
Points to Remember:

- Leave blank any fields that are not required for your referencing style. Refer to the Academic Referencing Tool: <https://latrobe.libguides.com/referencing-tool>
- Authors should be entered last name, comma, first-and-middle name (e.g., Smith, John Robert).
- Corporate authors (e.g., organisations) are entered with a comma at the end of the name (e.g., La Trobe University,). If the organisation's name has a comma in it, you must put a double comma at the end of the name (e.g., Department of Education, Employment and Workplace Relations,,)
- For multiple authors, each author must be on a separate line.
- For more tips on manual data entry please Refer to our expert guide: 21 <https://latrobe.libguides.com/EndNote21PC/add>

4. Save the reference by clicking the **Save** button.



5. Check the reference in the Preview pane on the bottom/left in your preferred referencing style to ensure you are not missing any information.



Exercise 4. Manual reference entry practice

In your EndNote library create the following sample references manually.

- Beezhold, B.L. & Johnston, C.S. 2012, 'Restriction of meat, fish, and poultry in omnivores improves mood: a pilot randomized controlled trial', Nutrition Journal, vol 11, no. 9, pp. 1-5.
- Campbell, T. Colin 2013, Whole: Rethinking the science of nutrition, Benbella Books, Dallas, Texas.
- Esselstyn, C B 2014, 'Ending the coronary heart disease epidemic', in Shushna Castle & AmyLee Goodman (eds), Rethink food: 100+ doctors can't be wrong, Two Skirts Productions, Houston, Texas, pp. 95-8.
- Physicians Committee for Responsible Medicine 2014, Animal Protein Linked to Early Death, PCRM, viewed 6 March 2014
<<http://www.pcrm.org/health/medNews/animal-proteinlinked-to-early-death>>

3. Attaching files and finding full text

Files can be attached to individual references (e.g. PDF, Word, Excel and image files). PDF files of journal articles can be attached to be read and annotated. You can also attach Word documents containing a summary of an article, or your own notes.

3.1 Attaching Files

To attach a PDF or document to a reference, click on the reference and click **Attach File** under the Summary tab for that reference. In the dialog box that appears, locate the file, and choose **Open**. The file is attached to your reference, including within EndNote Web once you sync.



3.2 Find Full Text

The Find Full Text option within EndNote desktop can be used to retrieve the PDF full-text files of journal articles and some other reference types. Select a journal article within your EndNote library, select **References > Find Full Text -> Find Full Text** from the main menu.

You may be required to authenticate. Use your La Trobe login details to log in, as you would through the library website. EndNote will then attempt to find the PDF file. The progress of Find Full Text is displayed on the left panel within EndNote desktop. If successful, a paperclip icon will appear next to the selected reference. If not successful, locate and download the relevant PDF file and attach to corresponding citation. *Refer to 3.1 Attaching Files.*

Note: EndNote uses several methods to search for full text publications, including a DOI and Web of Science Core Collection full text links. To optimise results, ensure your EndNote preferences are set to use La Trobe Library's online resources gateway. To set up your preferences in EndNote please see the instructions outlined in the LTU Endnote expert help guide:

<https://latrobe.libguides.com/c.php?g=937911&p=6787216>

For information about EndNote click, a browser extension that allows users to download PDFs of resources when available go to Clarivate's EndNote Click: [What is EndNote Click and how to use it?](#)

3.3 Opening File Attachments



Click on the reference to read, make notes, and annotate the attachment. EndNote 21 allows the file to be opened in the application associated with the file. Click on the reference and then go into the Summary tab. For example, clicking on a Word document will display an option to open the file attachment in Word.

4. Managing references

4.1 Groups

Groups are used to organise references into subsets for ease of later viewing. Groups can be created for a particular essay, article, or project, for example. Groups can also be shared with others to collaborate.

There are several types of groups in EndNote. Some are temporary groups generated by EndNote (e.g., Imported references). Others are permanent groups (e.g., All References).

4.2 Custom Groups

Custom groups are manually created by users to organise a library. Create a custom group by right-clicking on the **My Groups** text on the left of the EndNote desktop and selecting **Create Group**. Once the group has been created, drag-and-drop one or more references into the group from **All References** (permanent group).

References used in a custom group can be thought of as links back to that reference in the **All References** group. If a reference in a custom group is modified the change will be made to the actual reference in the **All References** group also. If a reference is deleted from a custom group, it will not be deleted from the **All References** group.

Note: the automatic **Unfiled** group includes all references that do not exist in any custom groups.

To delete a group, right-click on the group and select **delete group** from the menu.

4.3 Smart Groups

Smart Groups are created using specific search criteria. When a reference is created or edited to match that criteria, the smart group dynamically updates to include that reference.

For example, you may want to create a group based on common searches performed within **All References**. The exercise below describes this process.

Exercise 5. Add a Smart Group to EndNote desktop

1. To create a Smart Group, right-click on **My Groups** (on the left within EndNote desktop) and select **Create Smart Group**. For example, you may want to group references that contain the word 'diabetes' in the title.
2. In the dialog box that appears, enter a Smart Group Name (i.e. 'Diabetes').
3. Select 'Title' 'Contains' and enter text: 'diabetes'.
4. Click **Create**.
5. A new group will be created under My Groups.

4.4 Tags

As an alternative to Groups or in conjunction you may find that creating a customisable tag to your references will help you keep large volumes of references organized.

1. Select the Tag tab from the EndNote toolbar and select Create Tag
2. Give your tag a name and color
3. Add a tag to a reference

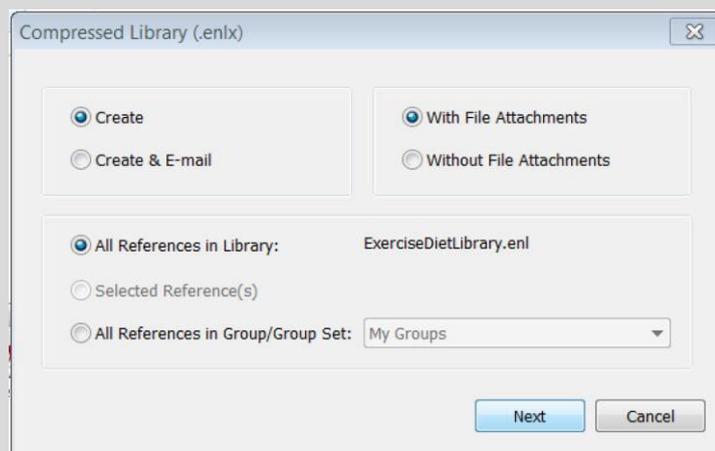
5 Store, Save and Backup a Library

You can create a compressed copy of your library. A compressed file is a copy of your library and its data folder. Making a compressed copy reduces its total size and makes it easier to email or copy onto a USB or hard drive. The following exercise describes backing up your library.

Note: Do not store your working library on a flash drive, network drive or an online synchronisation service such as OneDrive, Dropbox, Google Drive, CloudStor or any similar service as this may corrupt your library. Archived libraries can be saved on flash drives or online synchronisation services, but you should move the library to your computer or portable hard drive before opening/decompressing.

Exercise 6. Save & back-up your library

1. From the main menu within EndNote desktop, select **File > Compressed Library**. To create a full copy of your library select **Create and With File Attachments** (this includes the data folder). You can also click on 'Create & Email' if you want to email the saved copy.



2. There are also options you can choose to specify which references you want to copy. This is a back-up so '**All References in Library**' is selected.

It is good practice to include the date in the name of the copy. Save it on the desktop. Depending on the size of your library, it may take a bit longer

6. Using Endnote with Word

6.1 Citation Output Styles

EndNote supports over 6,000 referencing (or output) styles. You can change the output style of your in-text citations and bibliography as often as you require. Note, however, that it is not easily possible to change from Footnote to In-Text citation styles or vice versa within your document.

There are some styles specific to La Trobe University and these can be downloaded from the EndNote 21 Expert Help Guide: <https://latrobe.libguides.com/EndNote21PC/styles>.

Graduate researchers should check with their supervisors regarding their preferred citation style.

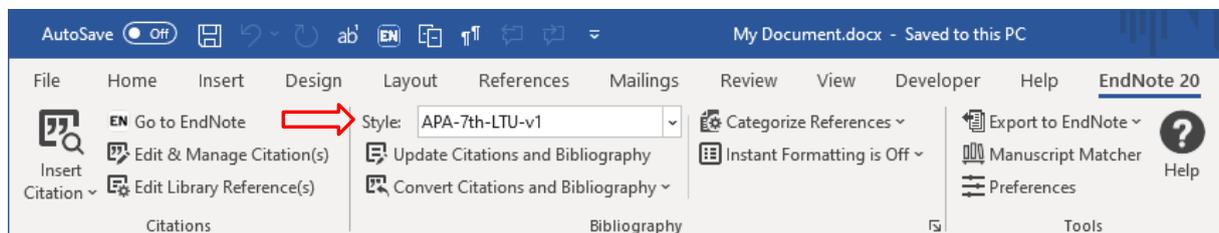
To change the output style in EndNote desktop:

Select a reference from your Library. In the **Summary** tab (on the right) select the desired style. Click the up arrow to view a preview of the select reference as it would appear in a bibliography in the selected style.

If the style you require doesn't show in the drop-down menu, you can access more styles by clicking on **Select Another Style**.

You can add additional styles to the Styles drop-down menu by selecting from the main menu **Tools > Output Styles > Open Style Manager**. Tick each of the styles that are to be included in the Styles drop-down list in the Preview pane. Styles can be edited if the style you are using contains formatting errors. If editing a style, regularly save and check the style using the Preview pane.

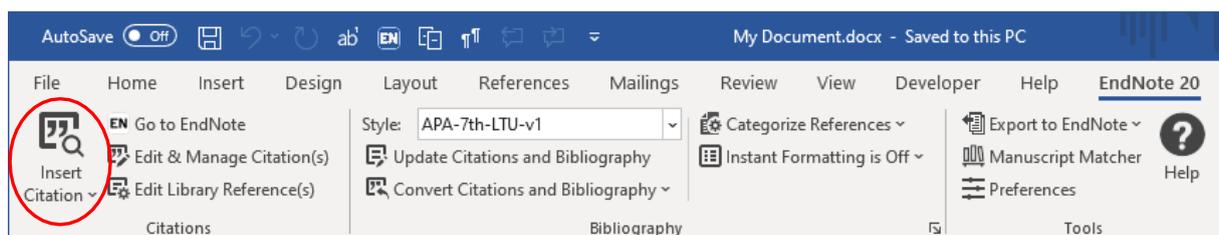
In Word, use the EndNote 21 tab to select to use a citation style.



6.2 Inserting and Editing Citations

EndNote's Cite-While-You-Write (CWYW) feature saves you time and effort as it enables you to insert in-text reference citations and automatically generate a bibliography.

When EndNote is installed on your computer it also adds an EndNote 21 toolbar to Microsoft Word's ribbon. With this menu you can insert and edit citations in your Word document and change the referencing style. You can also edit references in your EndNote library.



Each citation inserted in your document appears in a bibliography on the final page (by default). When instant formatting is turned on, you can drag and drop (not cut and paste) a bibliography to another location in your document.

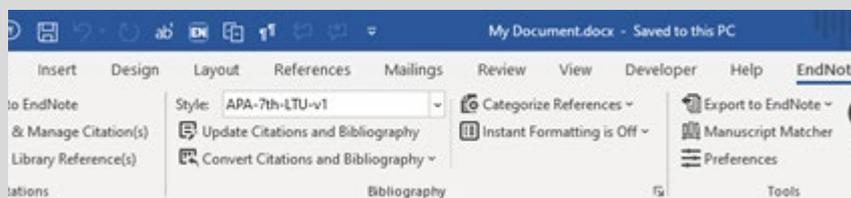
The exercises below provide step-by-step instructions on inserting and editing a citation within Word.

Exercise 7. Insert and edit an EndNote citation in Word

Word document created in Exercise 1.

entence such as 'Insert citation at the end of this sentence'. Leave the cursor at the end of the sentence as any citation will be inserted at where the cursor is.

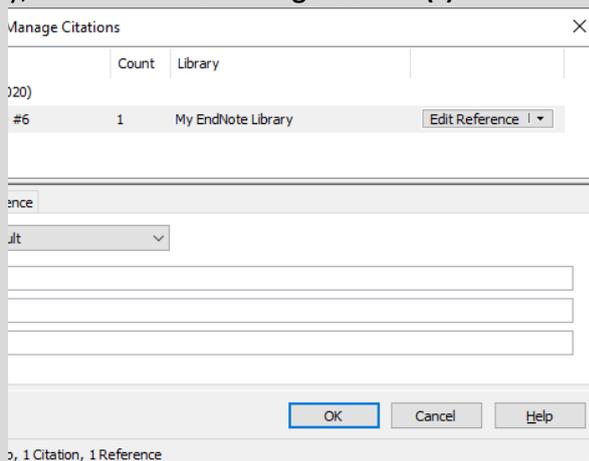
Click the **Insert Citation** button from the EndNote 21 tab. In the box that appears, type the author (or other details) for the specific citation you want to add and click



Search results for references will be displayed that match the keywords entered. Select the citation you wish to cite and click the **Insert** button. The citation will appear at the cursor position in the Word document.

To change the page number or edit the citation in other ways, select and right-click the citation. Then click **Insert Citation(s) > More** from the drop-down menu that appears.

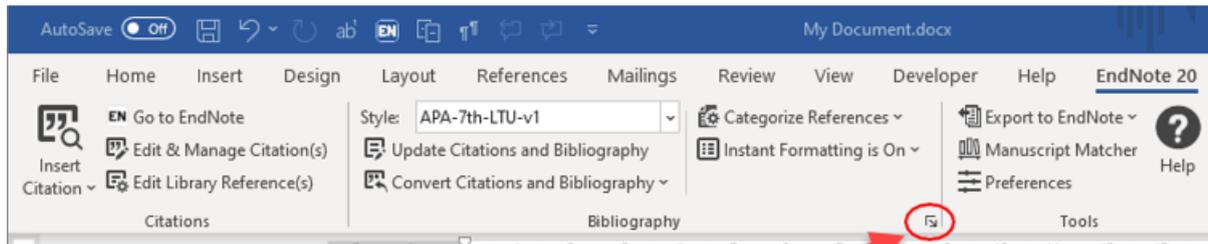
Alternatively, click the **Edit & Manage Citation(s)** button from the EndNote 21 toolbar.



To change the page number or edit the citation in other ways, select and right-click the citation. Then click **Insert Citation(s) > More** from the drop-down menu that appears. Alternatively, click the **Manage Citation(s)** button from the EndNote 20 toolbar.

6.3 Edit a Reference List (Bibliography)

You can change the font, paragraph spacing, alignment, etc. from the Word EndNote menu by expanding the Bibliography panel (click on the small arrow on the bottom right of the panel) and selecting **Layout** from the **Configure Bibliography** menu.



Select to configure bibliography

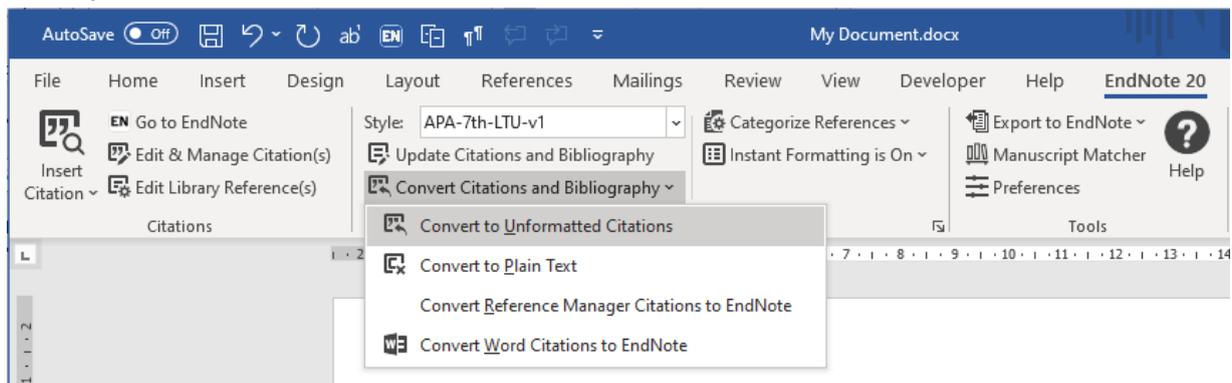
To change the content of a reference list you must first make the changes in your EndNote library and then update the Word document.

For example, if you want to change the date of a citation, edit the citation in your EndNote library and save it. Go back to the Word document and click **Update Citations and Bibliography** and the changes will be reflected.

6.4 Merging Thesis Chapters into a Master Document

Merging documents that contain EndNote cite-while-you-write entries is not as straightforward as copying and pasting from one document to another.

To merge separate documents into a single document chapter, use the **EndNote 21** tab. Within each document, select **Convert Citations and Bibliography > Convert to Unformatted Citations**. Each of the citations will be converted and be surround with curly brackets; for example {Schwartz, 1992 #113}.



Select the entire document contents (CNTRL-A to Select All) and copy (CNTRL-C).

Navigate to the correct position in the Master document. Click to place the cursor, and paste (CNTRL-V). Complete this procedure for each of the other documents.

Once all the documents have been compiled together into a master document, create a new page at the end of the document for the Bibliography. Select **Breaks > Page Break** from the **Layout** tab. Then from the **EndNote 21** tab, click the **Update Citations and Bibliography** button.

Word – Format Your Thesis training is also available through the library. This training includes topics such as style headings, multi-level lists, adding captions to figures and more. Please check the Library *What's On* for details and registration www.latrobe.edu.au/library