

# EndNote 21 Basic for Windows and Mac

Swinburne Library EndNote resources page:

<https://www.swinburne.edu.my/library/referencing/endnote-2.php>



These notes include screenshots from the EndNote and Web of Knowledge software and excerpts from help screens. Copied with permission from Thomson Reuters.

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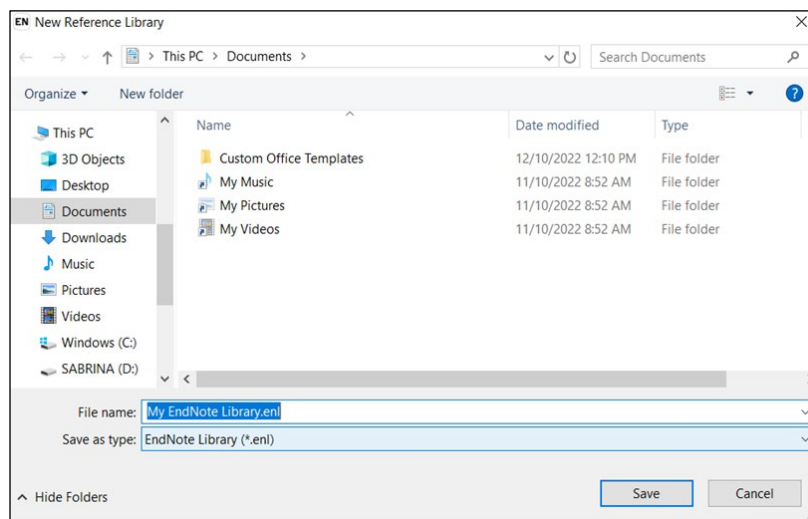
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## Checklist for keeping a stable EndNote library

1. Create a Research folder at the top of your hard drive – usually the C: drive on Windows, or in the Documents drive on Macs. Save your library there.

Do not store active EndNote files on syncing (OneDrive, Dropbox), networked drives (H: or G: drives) or Time Machine for Macs, as this will eventually corrupt and crash the library.

1. Create a folder at the top of your hard drive for your personal EndNote library and Word documents. Make sure that the folder is not part of your syncing system for backing up your files.
2. Create your new EndNote library and save it to this folder.



2. Save your Word documents to the Research folder.

- EndNote creates links to Word documents. If you move the file, the links may be broken between EndNote and Word and strange things may happen to your bibliography and in-text references.
- Having all of your Word documents in the same place also makes it very easy to back everything up.
- Write your chapters in separate Word files. Large files slow down Word performance. We can help you combine them later.

3. Regularly manually back up your library and Word documents

Regularly copy your research folder to another portable storage device such as a backup drive. This backs up your Word files as well.

4. Sync for automatic backups with EndNote online (EndNote Web)

EndNote Sync enables you to access your research on the Web and on other computers with EndNote 21. If you use more than one computer, or use a Mac and Windows at different locations, this is an ideal way to make sure each computer's library is kept current.

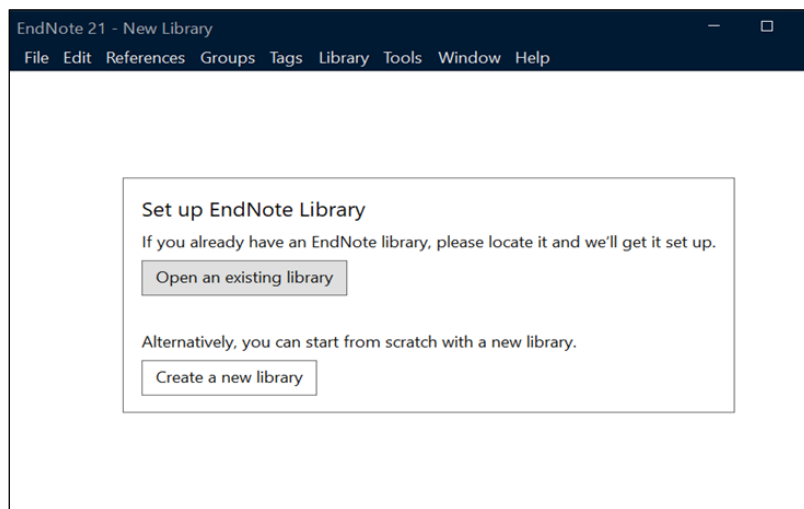
Sync can automatically backup your EndNote references and attachments, but not your Word documents.

5. Sync between Windows and Mac

If you use Windows computers on campus and a Mac at home, use EndNote Sync to share your library easily between the two computers and platforms.

## Getting Started

1. Type the word 'EndNote' into the search box of your Windows toolbar.
2. Click the EndNote apps.



3. If you have used EndNote 20 previously, click "Open an existing library" from the starter screen. Older libraries may need to be converted. Follow the prompts.
4. If you haven't used EndNote before, you will be presented with a box prompting you to set up a new EndNote Library. Click "Create a new library".
5. EndNote presents a window prompting you to name and save the new library. We need to create a folder on the hard drive for your research. Click the new folder to select it. (Do not save to OneDrive, Dropbox or other syncing drives or the library will get damaged.)
6. Change the save name if required. The extension ".enl" stands for "EndNote Library". EndNote will add ".enl" automatically.
7. Click Save.
8. The new empty library will open in EndNote 21.

## Adding references to your database

We recommend Firefox or Chrome browsers for searching our databases and transferring records to EndNote 21.

You can search Swinburne Sarawak library databases and then export the search results to EndNote. You will need to sign in using your OpenAthens account. Typically, Swinburne Sarawak Library databases will have an option to “mark” or “add” records of interest, and then you can look at the marked items and find an export option.

You may need to do some editing after the export.

### • Exporting references from Bibliographic Databases: an example

1. Make sure that you have your EndNote library open.
2. Go to the Library homepage <http://www.swinburne.edu.my/library>
3. A link for **Science Direct** appears under the Library search box. Click the **Science Direct** link.
4. Login with your OpenAthens account.
5. Type the words: **rainfall and "stormwater runoff"** in the search window.
6. Click **Search**.
7. You will get a list of all relevant articles. To mark articles of interest:
  - a. For one useful reference, you can click on the selection box. Then click the Export dropdown arrow and click the Export citation to RIS link.

The screenshot shows the ScienceDirect search results page. The search terms are "rainfall and 'stormwater runoff'". The results are sorted by relevance. The first article is "Compare individual and combined bioretention systems on the reduction of thermal pollution from stormwater runoff" by Mengqi Sun, Junqi Li, and Yangmo Zhu. The article is from the Journal of Environmental Management, September 2024. The 'Export' dropdown menu is open, showing options: Save to RefWorks, Export citation to RIS (highlighted with a red box), Export citation to BibTeX, and Export citation to text. A red box also highlights the 'Click to add a single record' button next to the article title.

8. Click the file at the bottom left corner.
9. This should then prompt the transfer windows, or save on the taskbar below the Windows, Click the file or open the file directly in EndNote.
10. EndNote 21 should transfer the records directly to your current library. If it doesn't, use the Look in the dropdown menu to find and click on your library file.

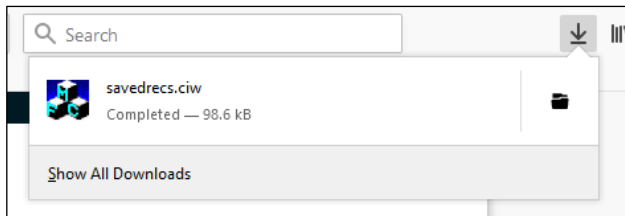
11. The references will be transferred to your library as an **Imported references** group. Note that exported references do not include full text.

**Mac transfer:** You may need to click **Choose...** and point to EndNote 21 in your Applications folder.

12. Click OK.

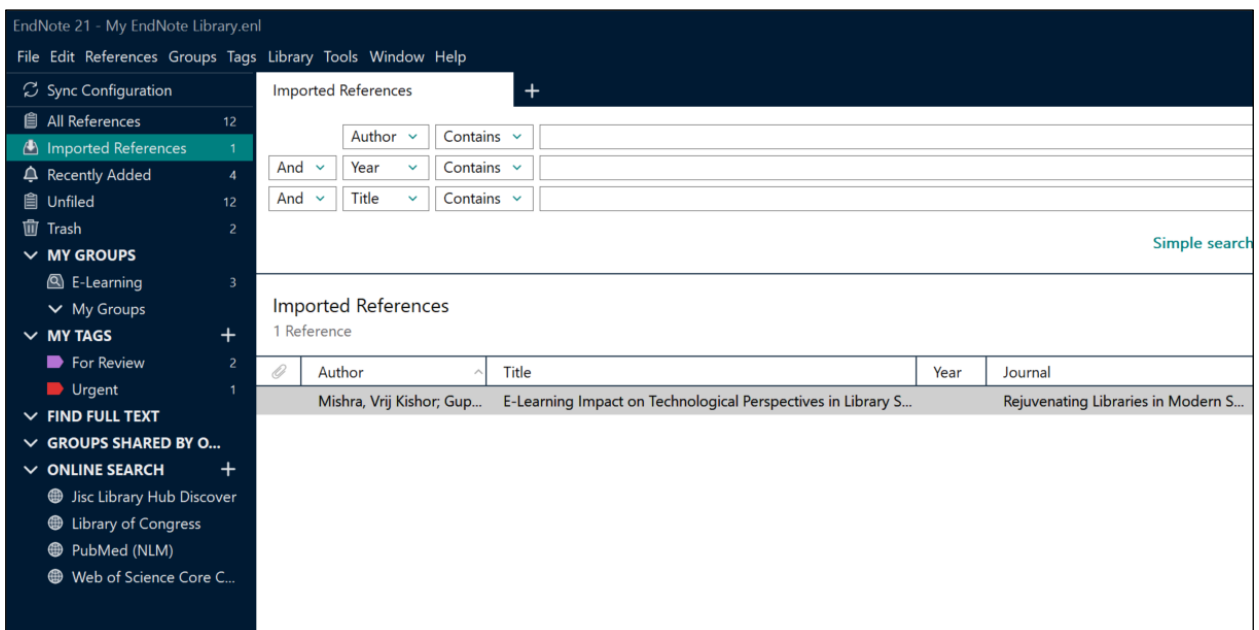
13. You may see a second "Choose destination" window if you also use EndNote Online. Click **EndNote** and **OK**.

14. If you don't see a transfer window at step 8, the file may automatically be saved to your Downloads folder (depending on your browser settings.)
- Chrome for Windows and Firefox for Mac has an arrow icon in the menu bar you can click to find the file.
  - Chrome for Mac saves the file to a menu bar at the bottom of the screen.
  - Otherwise use your File Explorer to locate the .ciw file and click it. This should then prompt the transfer window or open the file directly in EndNote.



15. EndNote 21 should transfer the records directly to your current library. Some Macs will request you point to the required library.

16. The references will be transferred to your library as an **Imported references** group. Note this does not retrieve the full text of the article.



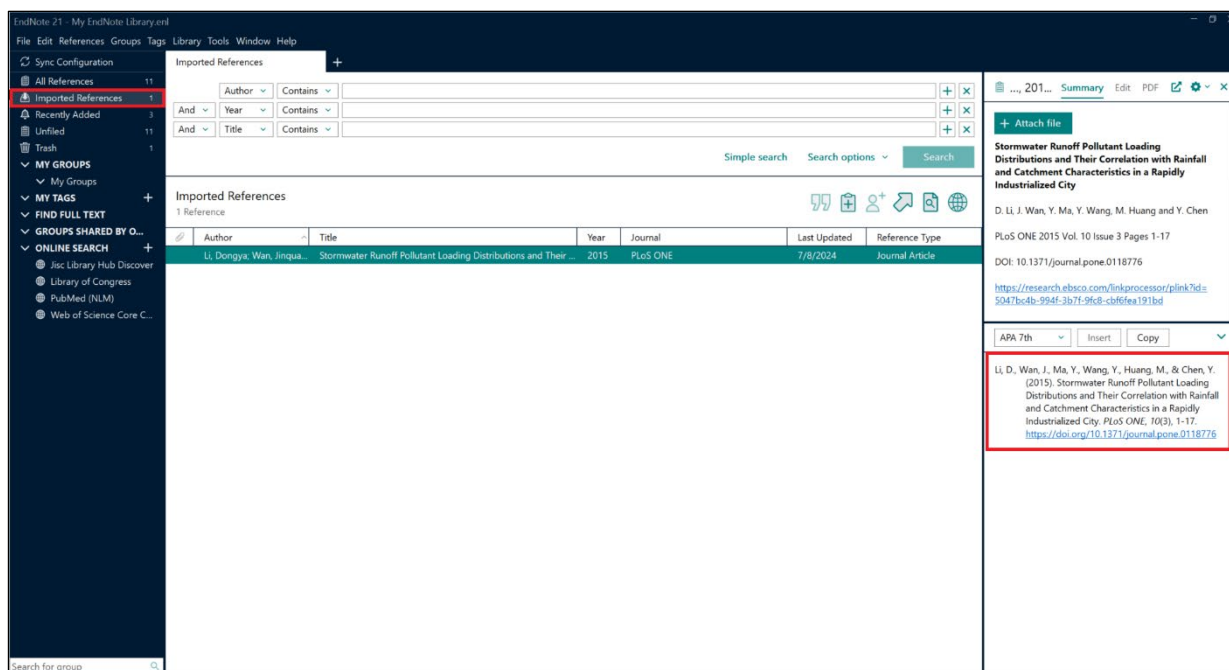
• Exporting references from the Swinburne search page: an exercise

1. Make sure that you have your EndNote library open.
2. Go to the Library homepage: <https://www.swinburne.edu.my/library>
3. Type your search terms in the search window.
4. Hit **Enter**.
5. Go to the title you are interested in and click on it.
6. Go to the Tools menu on your right and click **Cite**, then select **Export citation**.

The screenshot shows the Swinburne University of Technology library search results page. The search query is "Stormwater Runoff Pollutant Loading Distributions and Their Correlation with Rainfall and Catchment Characteristics in a Rapidly Industrialized City". The results page displays the article title, "Stormwater Runoff Pollutant Loading Distributions and Their Correlation with Rainfall and Catchment Characteristics in a Rapidly Industrialized City", published in PLOS ONE, March 2015. The authors listed are Li, Dongya; Wan, Jinquan; Ma, Yongwen; Wang, Yan; and +2 more. The page includes a "Cite" button and a "Download" button. The left sidebar contains navigation options like "My dashboard", "Research tools", and "Links".

This screenshot shows the same search results page as above, but with the "Cite" dialog box open. The dialog box displays the article title and authors: "Stormwater Runoff Pollutant Loading Distributions and Their Correlation with Rainfall and Catchment Characteristics in a Rapidly Industrialized City" by Li, Dongya; Wan, Jinquan; Ma, Yongwen; Wang, Yan; 2015. It offers two main options: "Copy citation" and "Export citation". Under "Export citation", there are several options: "Export to EasyBib", "Export to RefWorks", "Export to EndNote Web", "Export to NoodleTools", and "Export in RIS format (e.g. CITAVI, EasyBib, EndNote, Mendeley, NoodleTools, ProCite, RefWorks, Zotero, etc.)". A "Close" button is located at the bottom right of the dialog box.

7. Choose **Direct Export in RIS Format** (e.g. CITAVI, EasyBib, EndNote, Mendeley, ProCite, RefWorks Reference Manager, Zotero, etc).
8. Click **Save**.
9. Double-click on the file to open it in the Endnote application. (To do this, please open the EndNote Library application in advance)
10. The records will be transferred to EndNote.
11. EndNote 21 should transfer the records directly to your current library. If it doesn't, use the Look in dropdown menu to find and click on your library file.
12. The references will be transferred to your library as an **Imported references** group.





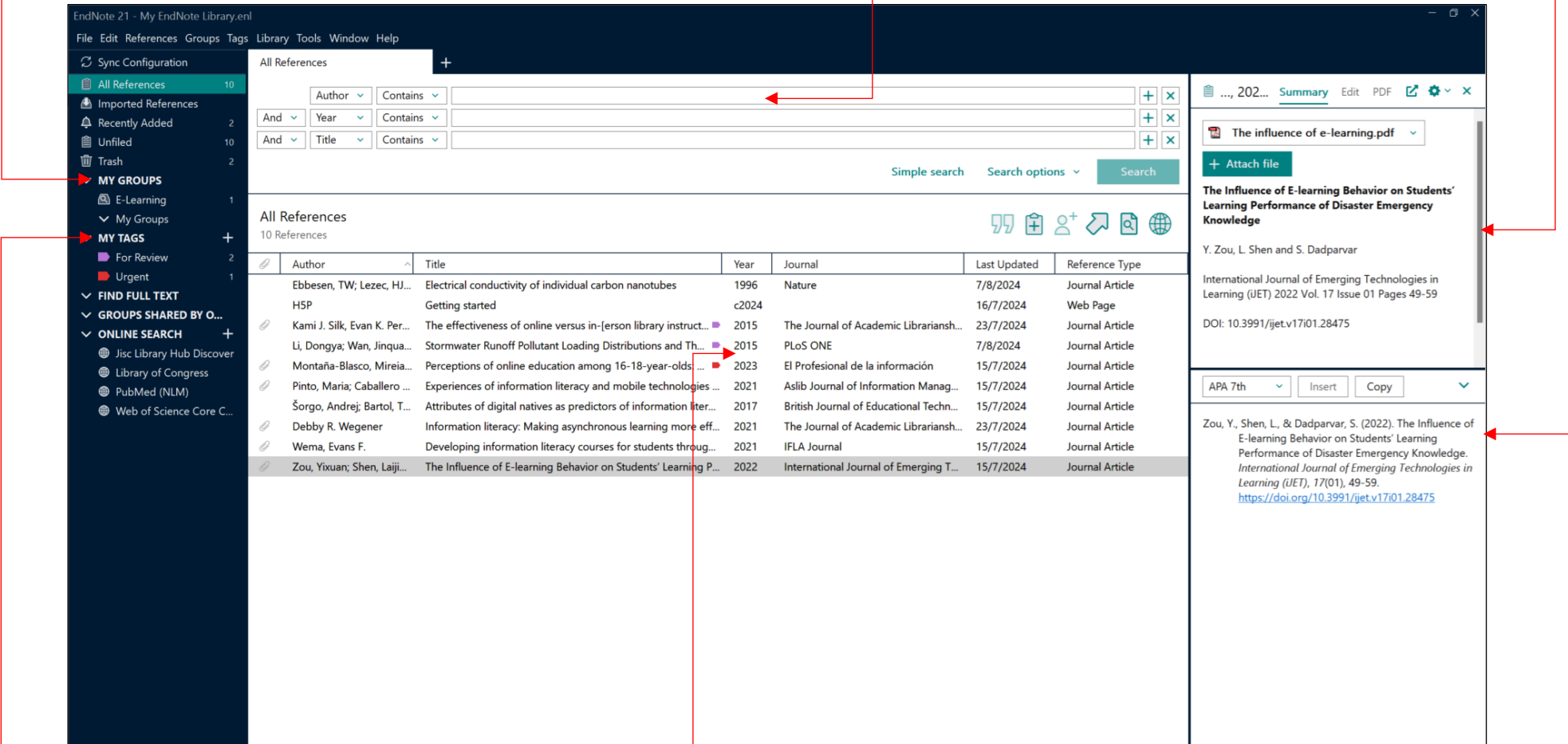
• Looking at your EndNote library

When you have transferred your records, you see the **EndNote 21 Library window**. The newly imported references are displayed on the summary screen.

The **Groups** panel shows **default** library **groups** and **group/group sets** you created for your research projects.

Use **Advanced Search** to query a **specific** field or craft a **multi-parameter** search. Switch to **Simple Search** to search all fields.

The **Summary** screen displays **vital** reference details. **Alter** data from the **Edit** screen or **read** an article from the **PDF** screen.



The **tags** system provides a new ability to **visualize** sub-topics in your library groups or provides an **alternate** organization system.

The **Reference List** panel shows the individual references **stored** in your EndNote library, also known as library **records**.

The **Preview** screen shows you how a reference would appear **formatted** with the selected EndNote **output style**.

EndNote's Preferences setup can be found in the EndNote 21 menu (**Mac**) or Edit Menu (**Windows**).

The **File** dropdown menu:

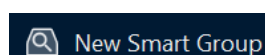
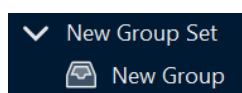
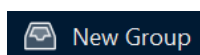
- Open, close, save and create EndNote libraries.
- Import individual PDFs or folders of PDFs - EndNote will attempt to find the bibliographic data for you.
- Make a compressed backup. (Limited to libraries of less than 4 GB in size and/or 65,535 files)

The **References** menu:

- Create, edit and delete references.
- Find Reference Updates – search for missing information.
- Find full text from a limited set of resources.
- Reference summary –see which groups it is assigned to.

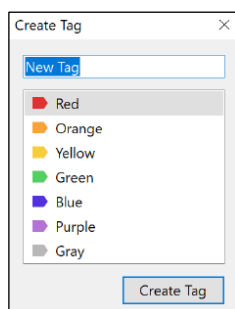
The **Groups** menu:

- Create, rename, edit and delete groups, which are a method of sorting your references.
- Group – organize your references by various topics.
- Group set – organize your numerous groups into sets. When we use the 'Find Full text' feature, EndNote will automatically create a Group set with 3 Groups titled 'Found PDF', 'Found URL', and 'Not Found'.
- Smart Groups – automatically add references to a group with specific criteria.



The **Tags** menu:

- A new feature for EndNote 21.
- Customizable labels with color coding as an alternate option to organize and classify references.
- Tag will appear next to the title of the article.



All References				
10 References				
Author	Title	Year	Journal	
Ebbesen, TW; Lezec, HJ...	Electrical conductivity of individual carbon nanotubes	1996	Nature	
H5P	Getting started	c2024		
Kami J. Silk, Evan K. Per...	The effectiveness of online versus in-[erson library instruct...	2015	The Journal of Academic Librariansh...	
Li, Dongya; Wan, Jinqua...	Stormwater Runoff Pollutant Loading Distributions and Th...	2015	PLoS ONE	
Montaña-Blasco, Mireia...	Perceptions of online education among 16-18-year-olds: ...	2023	El Profesional de la información	
Pinto, Maria; Caballero ...	Experiences of information literacy and mobile technologies ...	2021	Aslib Journal of Information Manag...	
Šorgo, Andrej; Bartol, T...	Attributes of digital natives as predictors of information liter...	2017	British Journal of Educational Techn...	
Debby R. Wegener	Information literacy: Making asynchronous learning more eff...	2021	The Journal of Academic Librariansh...	
Wema, Evans F.	Developing information literacy courses for students throug...	2021	IFLA Journal	

The **Library** menu:

- Manually sync your library.
- Find duplicates.
- Find/Replace and Change/Move/Copy fields.

The **Tools** menu:

- Edit the output styles that format the display of references.

You may need to make some changes to newly transferred references. Use the reference quick edit tab at the right of your screen and save the change.

### · Using the Edit panel

Sometimes references do not export smoothly from a database. You can make changes in the **Edit** window.

An example would be a newspaper article from EBSCOhost. Those articles are exported as a Generic Reference type instead of a Newspaper article. It won't look right in the preview panel or your bibliography until you correct it.

1. Click the Edit section on the **Reference** pane.
2. Click the **Reference type** dropdown menu, which may currently show "Generic".
3. Select **Newspaper Article**
4. You need to move the newspaper title and other details to the correct fields. Check the **Notes** field for missing information.
5. Click the Save button.

### · Adding some keywords

EndNote's basic search function lets you search in all fields, including PDFs. However, we recommend you add some descriptive words to the **Keywords** field to remind yourself of the important topics discussed in the article.

- Put them on separate lines so that EndNote will recognise each separate keyword.
- EndNote gathers a keyword term list and will autosuggest words from the list if you start to type in a similar word. Type over an autosuggestion if you need to use a new keyword.
- Using the same keywords in articles on the same topics will make it easy for you to use the Quick Search function to find similar articles.

### · Finding full text for a reference

EndNote can attempt to locate full text files from these sources on the Web:

- Web of Knowledge Full Text Links
- DOI (Digital Object Identifier)
- PubMed LinkOut – for medical and science resources

If found, EndNote downloads and attaches the files to the references. You can search for up to 250 records at a time.

To search for the full text:

1. Highlight the references you want to check. (click one record and Command-A for Mac, or Control-A for Windows)
2. Click the Find full text icon in the toolbar.

EndNote 21 - My EndNote Library.enl

File Edit References Groups Tags Library Tools Window Help

mbong@swinburne.edu.my

Sync Status

All References 24

Recently Added

Unfiled

Trash

MY GROUPS

- Sem 1 2024
  - Unit 1 3
  - Unit 2 3
- Winter Sem 2024
  - Unit 1 1
- Research
  - Chapter 1 3
  - AI 11

MY TAGS

- For review 4
- Urgent 1

FIND FULL TEXT

GROUPS SHARED BY O...

ONLINE SEARCH

- PubMed (NLM)
- Jisc Library Hub Discover
- Web of Science Core C...
- Library of Congress

All References

Advanced search

24 References

Author	Year	Title	Journal	Last Updated	Reference Type
Al-nuwaizer, Waleed M.	2022	Effect of visual imagery in COVID-19 social media.	PeerJ Computer Science	15/2/2023	Journal Article
Borgatti, Stephen P; Me...	2009	Network analysis in the social sciences	science	15/2/2023	Journal Article
Borgatti, Stephen P; Me...	2009	Network analysis in the social sciences	science	15/2/2023	Journal Article
Collomaz, Magali; Rigl...	2022	Social network analysis to study health behaviours L...	Social Science & Medicine	15/2/2023	Journal Article
Dorf, Richard C	2018	The engineering handbook		15/9/2023	Book
Evans, Nathaniel J; Bala...	2022	How the Impact of Social Media Influencer Disclosu...	Journal of Advertising Research	16/1/2023	Journal Article
He, Jianying; Baxter, Sal...	2019	The practical implementation of artificial intelligenc...	Nature medicine	1/2/2024	Journal Article
Li, Yiyang; Sathiakumar...	2019	Multiple lift DC-DC boost converter using CLC cell	Australian Journal of Electrical and E...	24/3/2024	Journal Article
Lim, Fei Victor; Chia, AL...	2022	"From the beginning, I think it was a stretch"-teach...	English Teaching: Practice & Critique	20/11/2023	Journal Article
Lim, Fei Victor; Cope, Bl...	2022	A metalanguage for learning: Rebalancing the cogni...	Frontiers in Communication	20/11/2023	Journal Article
Lim, Fei Victor; Toh, We...	2022	Multimodality in the English language classroom: A...	Linguistics and Education	20/11/2023	Journal Article
Martinez Gómez, Lilian...	2022	PLAN DE NEGOCIOS PARA LA EMPRESA CECYCEM ...	BUSINESS PLAN FOR THE COMPAN...	15/2/2023	Journal Article
Moroz, Nicholas; Moro...	2020	Mental health services in Canada: Barriers and cost...	Healthcare Management Forum	26/3/2024	Journal Article
Norz, Lisa-Maria; Doma...	2023	Measuring social presence in online-based learning...	The Internet and Higher Education	15/2/2023	Journal Article
Vedat Ozan Oner	2022	Developing IoT Projects with ESP32 Discover the...		6/6/2024	Edited Book
Rihanat Idowu Abdulk...	2015	DIVIDEND POLICY CHANGESIN THE PRE-, MID-, ...	ASIAN ACADEMY of MANAGEMEN...	17/11/2023	Journal Article
Schank, Roger C	1987	What is AI, anyway?	AI magazine	1/2/2024	Journal Article
Schweitzer, Louis; Bach...	2023	[Alternative methods to animal testing: the need for...	Biologie aujourd'hui	1/2/2024	Generic
Sheehan, Daniel; Hamilt...	2022	When is HILO Low? Price Image Formation Based...	Journal of Consumer Research	15/2/2023	Journal Article
Tacchino, Kevin	2023	How Planners Can Help Small-Business Owners wit...	Journal of Financial Service Professi...	15/2/2023	Journal Article
L. Willbanks	2008	This Old House: Using Enterprise Architecture to Up...	IT Professional	15/2/2023	Journal Article
Wiwankit, V.	2009	GLOBAL WARMING: A HOT TOPIC	Focus on Climate Change and Health	18/6/2024	Thesis
Yang, J.; Wang, Y.; Zhan...	2021	Alkaline deep eutectic solvents as novel and effect...	Int J Biol Macromol	1/4/2024	Journal Article

EndNote 21 - My Research Projects.enl

File Edit References Groups Tags Library Tools Window Help

Sync Configuration

All References 75

Imported References 75

Recently Added 75

Unfiled 75

Trash

MY GROUPS

- My Groups

MY TAGS

- FIND FULL TEXT
  - Searching... 1
  - Found PDF 6
  - Found URL 3
  - Not found 13

GROUPS SHARED BY O...

ONLINE SEARCH

- Jisc Library Hub Discov...
- Library of Congress
- PubMed (NLM)
- Web of Science Core C...

Imported References

75 References

Author	Year	Title
Akomeah, R.; Kquofi, S...	2023	An analysis on the cultural contexts of BLATI
Artpradid, V.	2023	Kinesthetic empathic witnessing in relation t
Banio-Krajnjik, A.	2023	Influence of Dance Classes on the Quality of
Barna, L.; Pucsok, J. M.; ...	2023	The Effect of Ten-week Ballroom Dance The
Barna, L.; Pucsok, J. M.; ...	2023	The Effect of Ten-week Ballroom Dance The
Beaudry, L.; Rochette, ...	2023	Adapting Dance to Complex Clinical Contex
Bress, S.	2023	Food for Dance
Bryl, K.; Fontanesi, C.; St...	2023	Abstracts from the 2022 Research and Thesi
Cai, X. Q.; Xi, M. Y.; Jia, ...	2023	An Automatic Music-Driven Folk Dance Mov
Caldwell, M. C.	2023	Dancing in silence in premodern Europe
Camacho, V. M.; Gardn...	2023	Dance Participation during the COVID-19 Pa
Cisneros, R. K.	2023	Parenting, Roma feminism, and dance: culti
Costa, S. A. D.	2023	Dancing upon the abyss: body and moveme
Cox, J.; Youmans, Jone...	2023	Dance Is a Healing Art

## • Manually adding full text articles and other attachments

If EndNote cannot automatically retrieve the full text, you can manually add the full text from files on your computer.

1. Click to select the record.
2. Click the "Attach file" button in the Summary panel.
3. Find the PDF or other format file on your computer.
4. Click **Open**. The file will be copied to your EndNote reference and library.

The screenshot shows the EndNote software interface. On the left, there is a list of references with columns for Title, Journal, Last Updated, and Reference Type. The reference 'Network analysis in the social sciences' is selected. On the right, the Summary panel for this reference is displayed, featuring a '+ Attach file' button highlighted with a red box. Below the button, the reference details are shown, including the authors (S. P. Borgatti, A. Mehra, D. J. Brass and G. Labianca) and the journal information (science 2009 Vol. 323 Issue 5916 Pages 892-895). A 'Manage tags' button is also visible at the bottom of the summary panel.

Title	Journal	Last Updated	Reference Type
Climate Change, Global Warming and Global Inequi...	IOP Conference Series. Earth and En...	18/6/2024	Journal Article
Effect of visual imagery in COVID-19 social media...	PeerJ Computer Science	15/2/2023	Journal Article
Network analysis in the social sciences	science	15/2/2023	Journal Article
Network analysis in the social sciences	science	15/2/2023	Journal Article
Social network analysis to study health behaviours i...	Social Science & Medicine	15/2/2023	Journal Article
The engineering handbook		15/9/2023	Book
How the Impact of Social Media Influencer Disclosu...	Journal of Advertising Research	16/1/2023	Journal Article
The practical implementation of artificial intelligenc...	Nature medicine	1/2/2024	Journal Article
Multiple lift DC-DC boost converter using CLC cell	Australian Journal of Electrical and E...	24/3/2024	Journal Article
"From the beginning, I think it was a stretch"-teach...	English Teaching: Practice & Critique	20/11/2023	Journal Article
A metalanguage for learning: Rebalancing the cogni...	Frontiers in Communication	20/11/2023	Journal Article

## • Importing PDFs from your files

EndNote 21 can also import folders of PDFs you already have and attempt to find the bibliographic (publication) information for the more recently published articles.

To import a folder of saved PDFs:

1. Open your EndNote library.
2. Click on **File > Import.> Folder > Choose**
3. Find the folder of PDFs and click on it.
4. Click **OK**.
5. Check the Duplicates option. Select your preference.
6. Click **Import**.
7. Any PDFs with embedded DOI data will be imported to new records with basic bibliographic data.
8. All others will be added to individual default journal article records and the file name of the PDF will be listed in the title field. You will need to manually add bibliographic data for those references.

Author	Year	Title	Rating	Journal	Last Upd...	Reference Type
Ross	2010	Parental Depression and Divorce and Adult Chil... <143.pdf>		Journal of Child and Family Studies	2/12/2020	Journal Article
Taylor	2009	Parental Depression in the Context of Divorce a...		Journal of Divorce & Remarriage	2/12/2020	Journal Article
Stallman	2014	A Randomized Controlled Trial of Family Transiti... <renaming mpd.pdf> <mohr 2002.pdf>		Journal of Divorce & Remarriage	2/12/2020	Journal Article
Brown	2014	Filicide and Parental Separation and Divorce <elbogen 2009.pdf>		Child Abuse Review	2/12/2020	Journal Article
Gray	2016	'I'm Working Towards Getting Back Together': C...		Child Abuse Review	2/12/2020	Journal Article
Romero-López	2016	Una revisión de los trastornos disociativos; de la...		Anales de Psicología	2/12/2020	Journal Article

If you choose to import duplicates to a duplicate library, EndNote will create one and report the number of standard and duplicate imports. Note that after the transfer, EndNote may display the duplicate library – it is important to check the library's file name at the top of the screen.

## • Opening attached PDFs

1. Click the reference to select it.
2. **Attachments** are listed at the top of the Summary panel. Click to see your options to open the attachment within EndNote, Adobe Acrobat or rename the file.

## • Searching your library

Click All References to make sure you are searching for the whole library.

There are two ways to search your library:

1. The quick search field at the top of the reference window – a simple search for a keyword or author name.
2. The Advanced search link to search for a combination of terms or search in other fields or the PDF or sticky notes.

If you want to search the contents and sticky note comments of your PDFs, you must do an advanced search. You can then set the search field to “Select the Any Field + PDF with Notes” option from the Field list. You may need to scroll up.

The references found in the last search operation are saved in a temporary Search Results group. When you close the library or run another search, this temporary group is discarded.

## • Managing your references: Creating groups

Groups make it easy to organise a large library into folders or subsets for later access. You might want to create a group to gather the research materials for a particular assignment or journal article. Some researchers use groups to collect resources for each chapter in their thesis.

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 by interlibrary loan.

1. Click the Groups dropdown menu.
2. Click on Create new group.
3. Call the new group Need fulltext and hit Enter.
4. Click the Not Found group that resulted from the Find Full Text search.
5. Ctrl-A to select all of the references if they aren't already highlighted.
6. You can add the highlighted references to the group in several ways:
  - i. Drag and drop them onto the group Find Full Text.
  - ii. Click the Groups dropdown menu, click Add References To, and select the group Need fulltext.
  - iii. Right-click on a selected item, click Add References To, and select the group Need fulltext.
7. Click on the group name to see its contents.
  - You can add a reference to a particular group only once. However, you can add that reference to any number of groups.
  - Deleting a reference from a custom group does not delete it from the library.
  - Deleting a reference from a library also deletes it from all groups in that library.
  - Want to see which groups you have put a reference in? Click the reference, then click References > Reference summary.



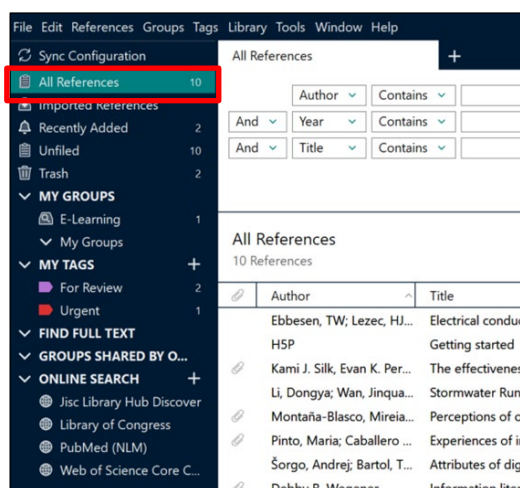
## Setting up EndNote sync for auto backup

### • Syncing to a new EndNote online account

EndNote 21 gives you the ability to automatically back up references via EndNote online <http://www.myendnoteweb.com/> and sync across two or more computers. You can also share the entire library via 21 or just a group (or selected groups) via EndNote online with fellow researchers. Information about sharing groups or libraries is available on our website.

- You can sync one library with up to 1,000,000 references, 5000 groups and unlimited attachments.
- Please only do this on your own computer.
- **Note: You can only link one library to an EndNote online account. This online account will then "lock" to that computer's copy of the EndNote software.** You will not be able to work with more than one synced account per personal computer or per login on Swinburne computers.

1. Click the **Sync configuration** in the groups panel.



2. Click **Sync Now**.

Starting from EndNote 21 will get you a full-service EndNote online account. Going directly to the website gets you only a basic account.

#### Have an EndNote online account already?

Type your existing EndNote online login and password into the EndNote Account Credentials fields and click **OK**.

#### Don't have an EndNote online account?

- a. Click Sign Up.
  - b. Type in your preferred email: it does not have to be your Swinburne email.
  - c. Complete the registration process.
3. The Sync system will authorise your new account and add the details to EndNote 21. The library will automatically sync every 15 minutes and when you close the library. Change the settings in the Preferences > Sync screen if required.
  4. If you have references in the library, you will be asked to make a compressed backup. Follow the instructions to do so.
  5. The first sync can take a long time, especially if you have many references with full text. Please be

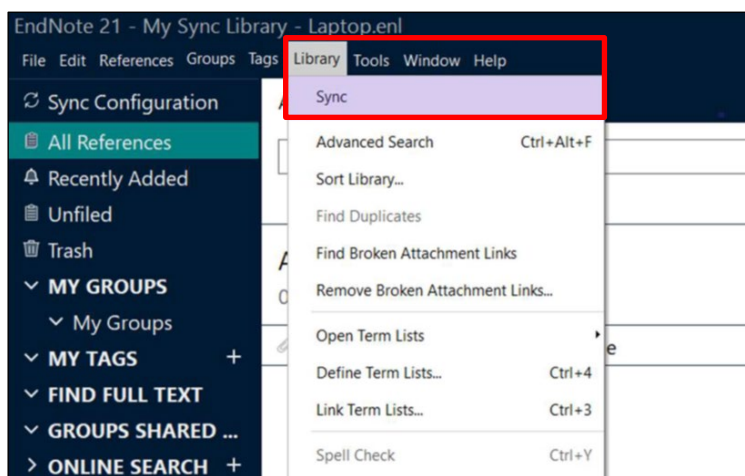


patient - future syncing will be much quicker.

6. EndNote 21 and EndNote online will now sync automatically. Please remember to regularly back up your Word documents.

#### • Syncing an existing account to a second computer (Mac or Windows)

1. These instructions assume you have already created and synced a library on the first machine.
2. Open EndNote 21 on the second computer (Mac or Windows).
3. Click **File**.
4. Click **New**.
5. Create a new library.
6. Library > Sync in the menu.



7. Type your existing EndNote online login and password into the EndNote Account Credentials fields.
8. Click OK.
9. The library will automatically sync every 15 minutes and when you close the library. Change the settings in the Preferences > Sync screen below if required.  
(Edit > Preferences > Sync for Windows *or* EndNote > Preferences > Sync for Mac)
10. Click OK to close the Preferences screen.

The synced library's references, attachments and groups will be added to the library on your second machine. Your computers will now sync to EndNote online and update automatically. Please remember to regularly back up your Word documents.

## Simple bibliographies

EndNote's Cite While You Write (CWYW) feature is a powerful tool that allows you to create "live" bibliographies that update when you insert references into your text. However, it can cause corruption in your Word documents if used incorrectly.

Sometimes you might want to produce a bibliography or reference list quickly without using CWYW. We call this a simple bibliography and it is quick to generate and add to an existing document.

1. Make sure the citation style you wish to use is active in EndNote (see pages 20-21)
2. Control-click (Win) or Command-click (Mac) to highlight the articles you want to use or
  - Add all of the relevant references to a group
  - Click one of the references within that group
  - Ctrl-A or Command-A to select all of the group
3. Click **Copy Citation** at the bottom of the summary panel.
4. Paste the list to your Word document. This will create a formatted bibliography without linking to EndNote. The new bibliography may need its font or spacing to be changed to match the rest of the document.
5. Any corrections you make to the bibliography are only for this document.

## When should I use Cite While You Write?

EndNote's Cite While You Write (CWYW) feature is a powerful tool that allows you to create "live" bibliographies that update when you insert references into your text. However, it can cause corruption in your Word documents if used incorrectly.

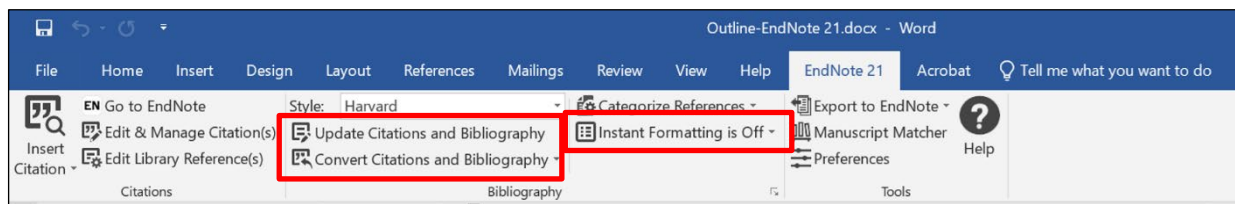
1. CWYW involves complex code that will be corrupted if you incorrectly move or delete those references. This can lead to bibliographies failing to format properly later, or the wrong references appearing in the paper.
2. It can also conflict with **Track Changes**, another feature of Word used frequently by supervisors and collaborating authors.
3. You need to either use the powerful features of Cite While You Write correctly from the beginning or insert them at the end of the writing process when you have finalised the content of your paper and have accepted or rejected all tracked changes.

We recommend two options while you are in the writing stage: place markers or unformatted citations.

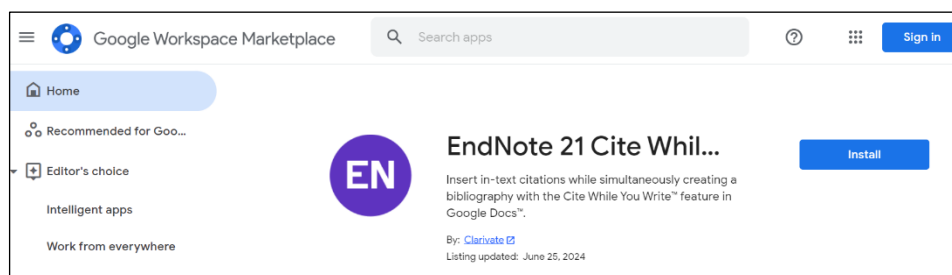
1. Use plain text to put in "**placemarkers**." A placemaker such as <<Jones and Wade, 2015 pg12>> can be safely moved or deleted. You can find the placemarkers easily by using Control-F and searching for << and replace them with formatted citations when the paper is at the final stages of completion.
2. Use **unformatted citations**. These use EndNote code to identify the reference in your EndNote library, but the code is not active and can be safely moved or deleted.

An unformatted citation looks like this:

- Click the EndNote 21 tab in Word.
- If Instant formatting is turned on, click to turn it off.
- If you have formatted CWYW citations, click **Convert Citations and Bibliography**.
- If you are using a Mac, find your Convert options in the Tools dropdown tab.
- If you need to see the formatted references, click **Update Citations and Bibliography**. Remember to unformat them afterward.



With EndNote 21, Cite While You Write is now compatible with Google Docs for EndNote 21, besides Microsoft Word or Apple Pages documents. You will need to install the EndNote 21 Cite While You Write in Google Workspace Marketplace, and then login with your EndNote Web account.



## I'm ready to use Cite While You Write. Now what?

### • What are output styles?

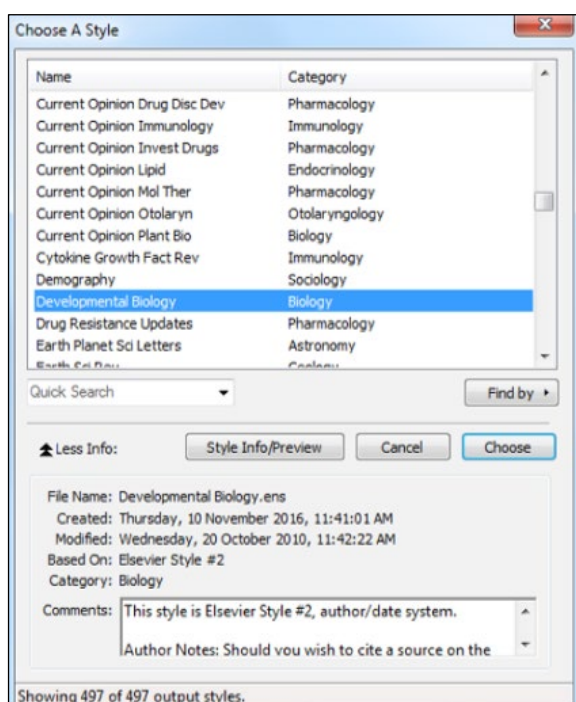
An output style determines how the selected reference will be formatted and displayed in Word. You will be able to concentrate on writing your essay or thesis, with the knowledge that EndNote will handle the correct punctuation and formatting of your references.

Please check with your department to see if there is a preferred style.

If you need a style such as APA 7<sup>th</sup>, Chicago A or B, Nature, IEEE, or many others, EndNote 21 has almost 500 included styles.

### • Activating a style within EndNote

1. Click the **Current Style** drop down menu. (at the bottom of the Reference summary screen)
2. If the style you want is not listed, click **Select another style**.
3. Scroll through and click the style you wish to activate.
4. Click the **Style Info/Preview** button if you want to see a sample bibliography.
5. Click **Choose**. The style is now available and active within EndNote.



### • What if the style is not included in EndNote?

Some departments require the Swinburne Harvard style, based on our online Swinburne Harvard Style Guide. The Harvard style included with EndNote does not match Swinburne's Harvard style.

We will download the Swinburne style to practice downloading and activating styles.

First, we need to set up a folder on your computer to which we can save the file. This is required for EndNote to locate new styles, as set in the Preferences.

1. Open Windows Explorer and click **Documents**.
2. Right-click and select **New > Folder**.
3. Name the new folder **EndNote**.
4. Double-click the **EndNote** folder.
5. Right-click and select **New > Folder**.
6. Name the new folder **Styles**.

Now we can find and save the Swinburne Harvard style.

7. Go to the library's EndNote page at <https://www.swinburne.edu.my/library/referencing/endnote-2.php>
8. Scroll to the **Swinburne Harvard Style output style** box.
9. Click on the installation link for the Swinburne Harvard style.
10. You should be offered a chance to open or save the file. Click **Save**.
11. Click **OK**.
12. Select the **C:/Documents/EndNote/Styles** folder.
13. Click **Save**.
14. You will need to activate the style in EndNote or Word in order to use it.

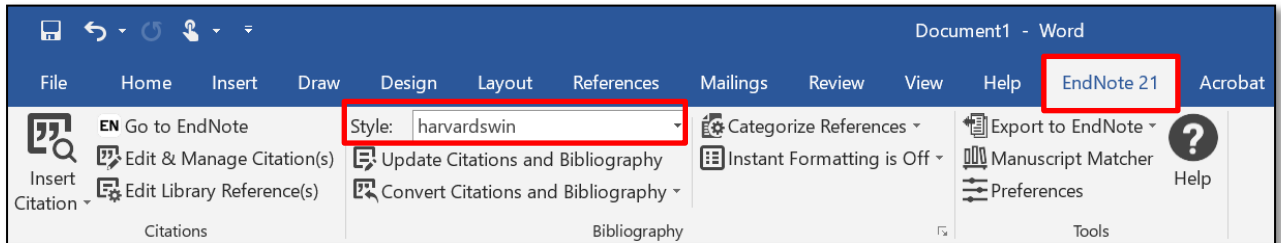
If you need a specialist journal style, for example, the CSIRO's biology style, the EndNote website hosts thousands of styles.

1. Go to <http://endnote.com/downloads/styles>
2. Type in the style or journal name.
3. Click **Apply**.
4. Click the download link for your style.
5. Then follow the steps above to save the style to the **C:/Documents/EndNote/Styles** folder.

## • Changing a style within Word

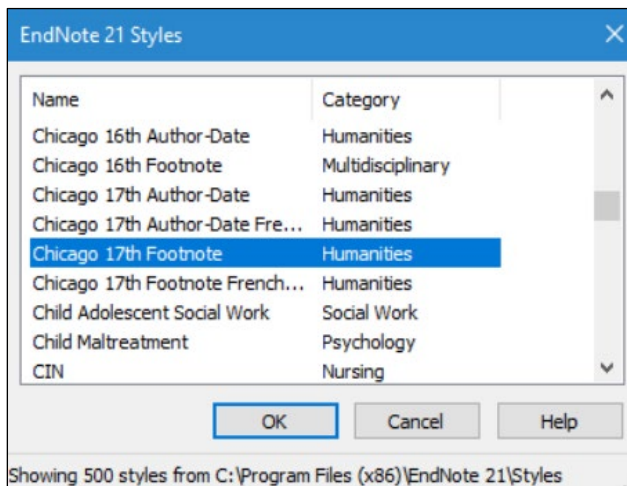
When you install EndNote 21 onto your computer, it automatically adds the necessary EndNote tab to the tools in your Word software. Click on the EndNote 21 tab.

The style shown is usually the style you activated in EndNote 21.



If you need to change to another style for this document.

- Click **Select another style**.
- Click the grey **Name** header to sort the styles alphabetically.
- Click the first style, then type the first couple of letters of the style name to jump down the list.
- Click the style you wish to activate.

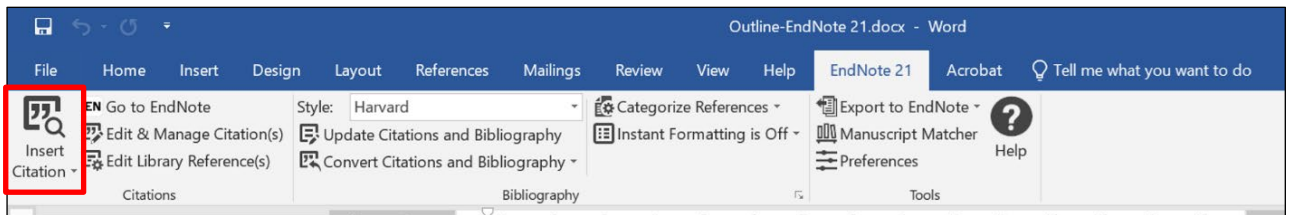


- Click **OK**.

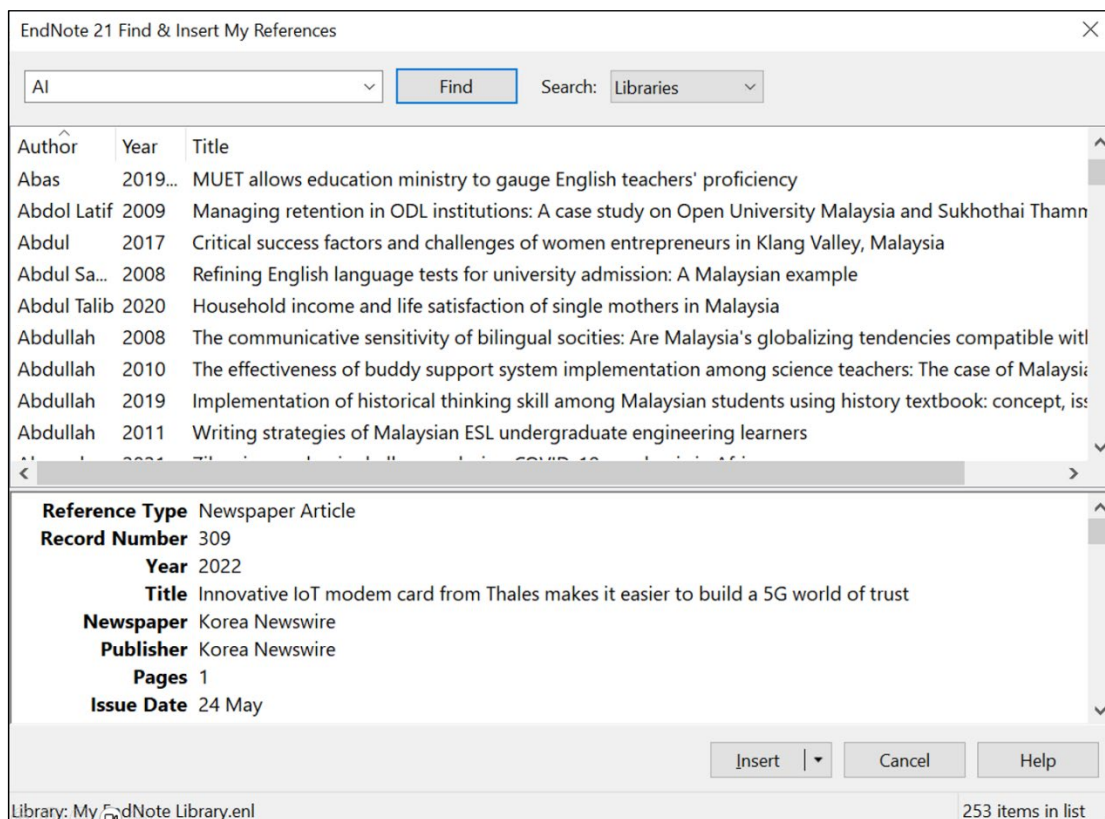
If you need to change the style of your bibliography later, use the Current Style drop down menu on the EndNote 21 tab to choose an active style or click **Select another style** to activate a new one. EndNote 21 and Word will automatically reformat your document.

## Using CMYW with Word: an exercise

1. Make sure your EndNote library is open.
2. Open a new Microsoft Word document.
3. Type in the following code to generate some random sentences we can work with:  
=rand(2,4)
4. Press **Enter**.
5. Click at the end.
6. Click **Insert Citation**.



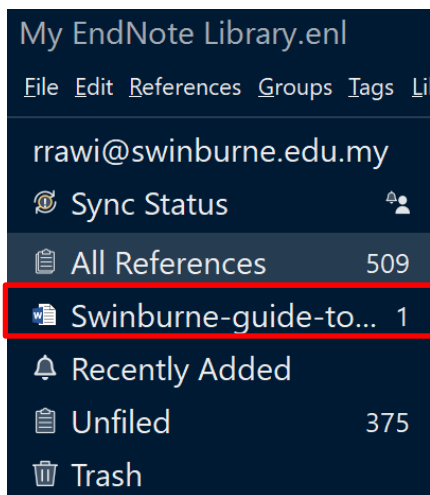
7. EndNote displays a Find Citation(s) dialog window.
8. Type an author's last name, keyword or year into the "Search for" box. For this example, type the phrase drainage.
9. Click **Search**.
10. EndNote compares the identifying text to your EndNote references and then lists the matching references. When multiple references match the search, you can identify, highlight, and insert the appropriate reference.



11. Click on a reference to select it. If several papers might be relevant for an in-text citation, hold down the **Ctrl** or **Command** key and click on the references you wish to cite.
12. Click **Insert**. A single reference will be inserted into the text within its own bracket; multiple

references will be inserted into a bracket and sorted according to your chosen output style.

13. Once the bibliography has been generated, the in-text citation will list the papers in an order specified by your output style.
14. Save the EndNote-connected Word document.
15. Once you have added a formatted citation to the document and updated your bibliography, a group with the document's title will appear in your EndNote library. This group shows all linked citations within the document and is only available when the document is open and citations are formatted (Ali, Hamid & Moni 2013).



16. Want to use unformatted citations during the writing stage? (recommended)
  - a. Click the EndNote 21 tab in Word.
  - b. Click Convert to Unformatted Citations.  
Note that you will not then have a clickable Word group in EndNote.

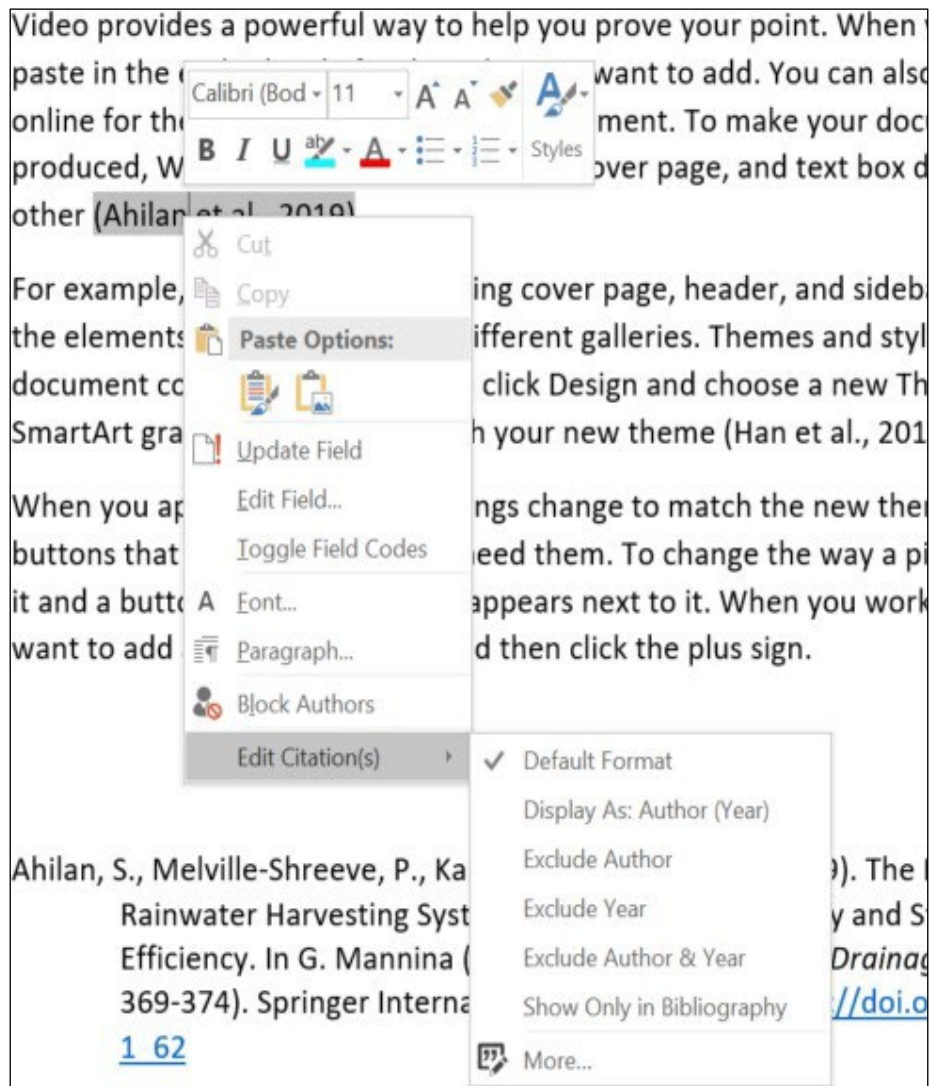


### • Changing a reference's appearance

You can quickly customize a formatted citation's appearance by

- moving the author's name out of the brackets
- hiding the author's name or date
- or hiding the in-text reference completely

1. Right-click on the citation to select it.
2. Scroll down the pop-up menu to **Edit Citation**.
3. Click on the option you need.



### • Adding text and pagination

You may wish to modify citations to add pagination details or "see also" references. The following modifications are available:

Prefix	Add preceding text, such as "Cited in " <b>Make sure you leave a space <u>after</u> the text</b> e.g. the discovery (as cited in Bender, 04)  This can also be used for psychological test abbreviations. e.g. Strengths and Difficulties Questionnaire (SDQ: Goodman, 1997)
Suffix	Adds the following text. Use this to add page numbers after the citation. <b>Make sure you put a space <u>before</u> the text</b> e.g. the discovery (Bender, 04 p.4)
Pages	<b>This field does not work with all output styles.</b> We recommend you use the Suffix modification instead.

To customise a formatted citation by adding a prefix, suffix or page numbers, or to modify several citations:

1. Click on the citation to select it.
2. Click on **Edit & Manage Citation(s)** in the Word EndNote toolbar.
3. The **Edit & Manage Citations** dialogue box will be displayed. All the citations within the document will be listed. Click the citation you want to customise.
4. Customise the citation as needed in the **Edit Citations** section of the window. If you wish to change one reference within a group, make sure you click on the reference in the "Citations in document" window first, to ensure you change the correct reference.
5. Click **OK**.

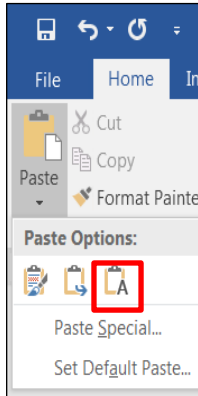
### • Safely copying text and references between documents

There is a lot of complex hidden code that you don't see when EndNote and Word work together. That code can be corrupted if you copy or delete references incorrectly. You can tell if a paragraph has EndNote code in it. Select the paragraph: EndNote links are highlighted in a dark grey.

On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document (Barrios et al. 2011). You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. (Carro et al. 2002) explains when you create pictures, charts, or diagrams, they also coordinate with your current document look. You can easily change the formatting of selected text in the document text by choosing a look for the selected text

There is a safe way to copy text with EndNote links to another document.

1. Highlight the desired text.
2. **Ctrl-C** to copy the text.
3. Switch to the other document.
4. On the Home Tab, click the drop down under Paste.
5. Click the icon for "Paste text" only.
6. Re-link the EndNote reference.

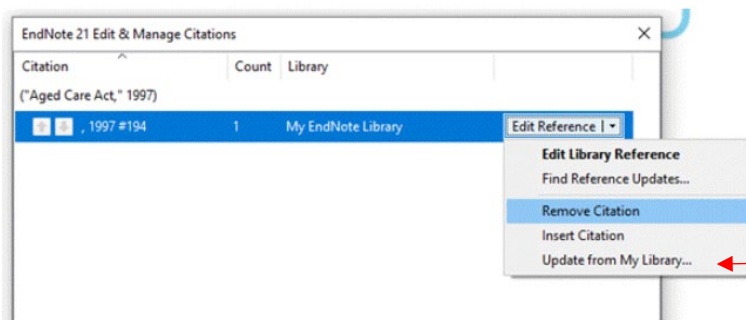


#### • Safely deleting documents

Please **DO NOT** delete unwanted citations by highlighting them and hitting the delete key. While doing so does remove the unwanted citation's text, it leaves all of the "behind the scenes" coding that allows EndNote 20 and Word to work together. This orphaned code can cause all sorts of problems later, including citations appearing out of order, and is hard to fix.

If you wish to remove a citation completely:

1. Click on the citation to select it.
2. Click on **Edit & Manage Citation(s)** in the Word EndNote toolbar.
3. The **Edit & Manage Citation(s)** dialogue box will be displayed. All the citations within the document will be listed. Click the **Edit Reference** dropdown arrow next to the citation you want to delete.
4. Click **Remove Citation**.



This is the only safe way to remove EndNote references. **DO NOT** hit the delete key!

5. Click **OK**.

## Where can I get help with EndNote?

- The Swinburne Library EndNote page: <https://www.swinburne.edu.my/library/referencing/endnote.php>  
Our training videos, training guides, and the Swinburne output style are listed here.
- Clarivate's customer service <https://support.clarivate.com/s/> - their online support is quick (during US business hours) and comprehensive.
- You can download thousands of output styles at <https://endnote.com/downloads>
- View online tutorials at <https://clarivate.com/webofsciencegroup/support/endnote/>

Still having trouble? Use our contact form to get expert help from the EndNote team.

<http://www.swinburne.edu.au/library/referencing/references-endnote/endnote/endnote-enquiry/>