



EndNote for PC

User Guide

UTS Library
University of Technology Sydney

EndNote for PC

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Part 1 – Installing EndNote

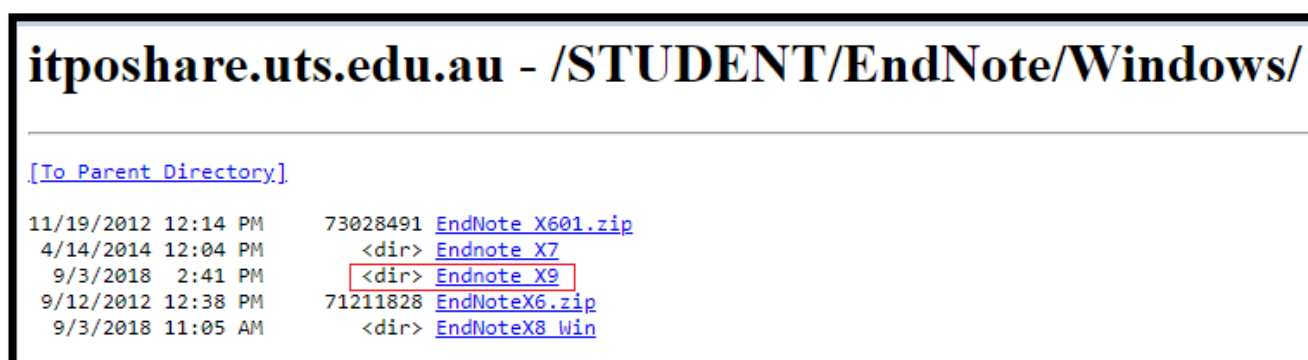
What is EndNote?

EndNote is a reference management software that will basically do two things:

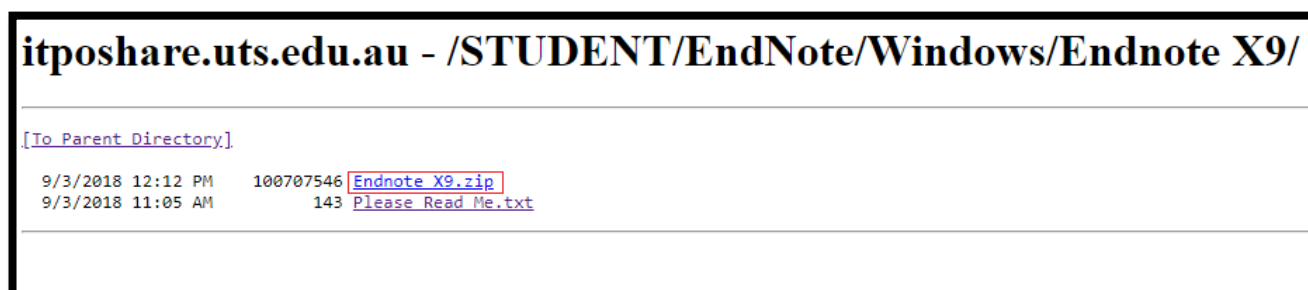
- Store and manage the citations they find while doing their research; and then
- Add these citations into the text of a Word document, which automatically creates a styled bibliography at the end.

Download EndNote Application Installation file

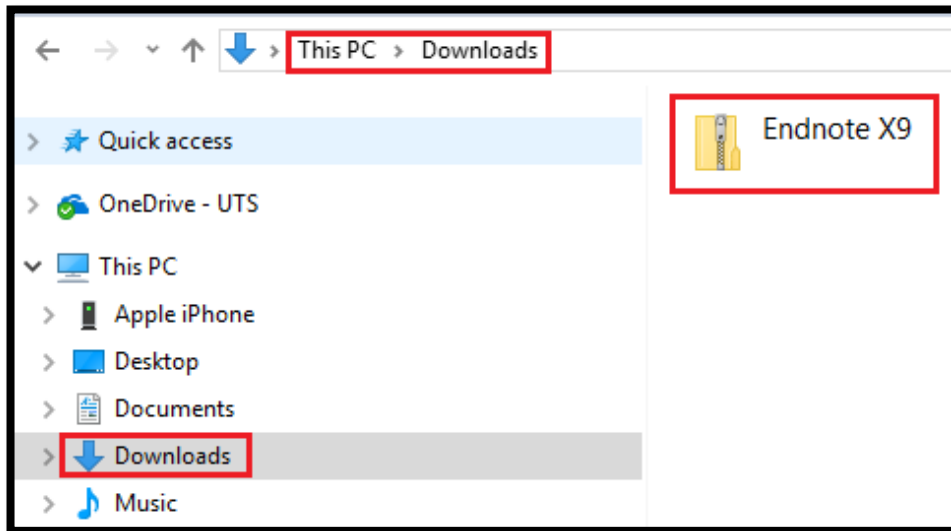
- Quit Microsoft Word, if you have it currently open.
- Go to <https://itposhare.uts.edu.au/STUDENT/EndNote/Windows/> (If you experience issues accessing this link, try a different browser and/or clear history and cache).
- If prompted, log in using your UTS ID and Email Password. You should then see a screen that looks like this:



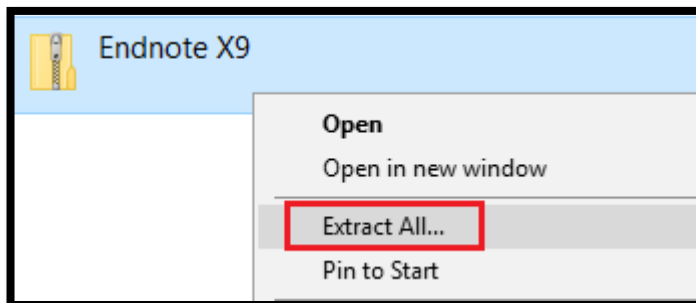
- Look for the latest version of EndNote, and click on it (in this case, it is EndNote x9). It will take you to a zip file. This is the installation file you need to download.



- Click on the **Endnote X9.zip** file. The file will download to your PC, - most likely in your PC's '**Downloads**' folder.



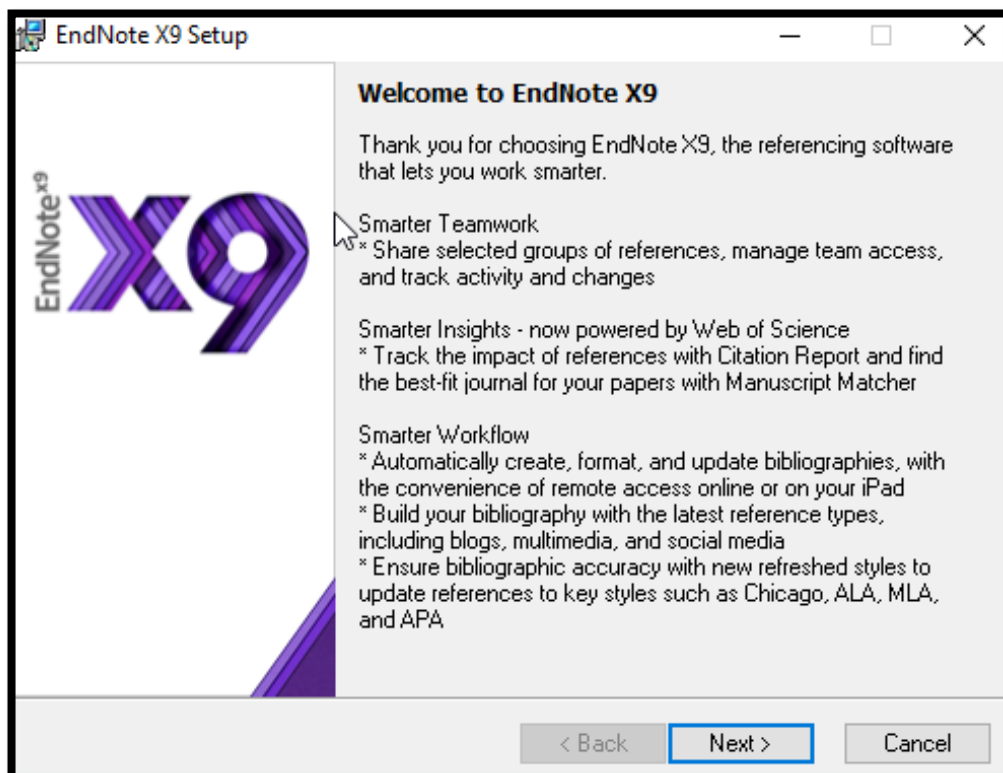
- Click on the Zip folder to select it. Then **right click** > choose **Extract All**



- You should now see a file called: **ENX9INST.msi**

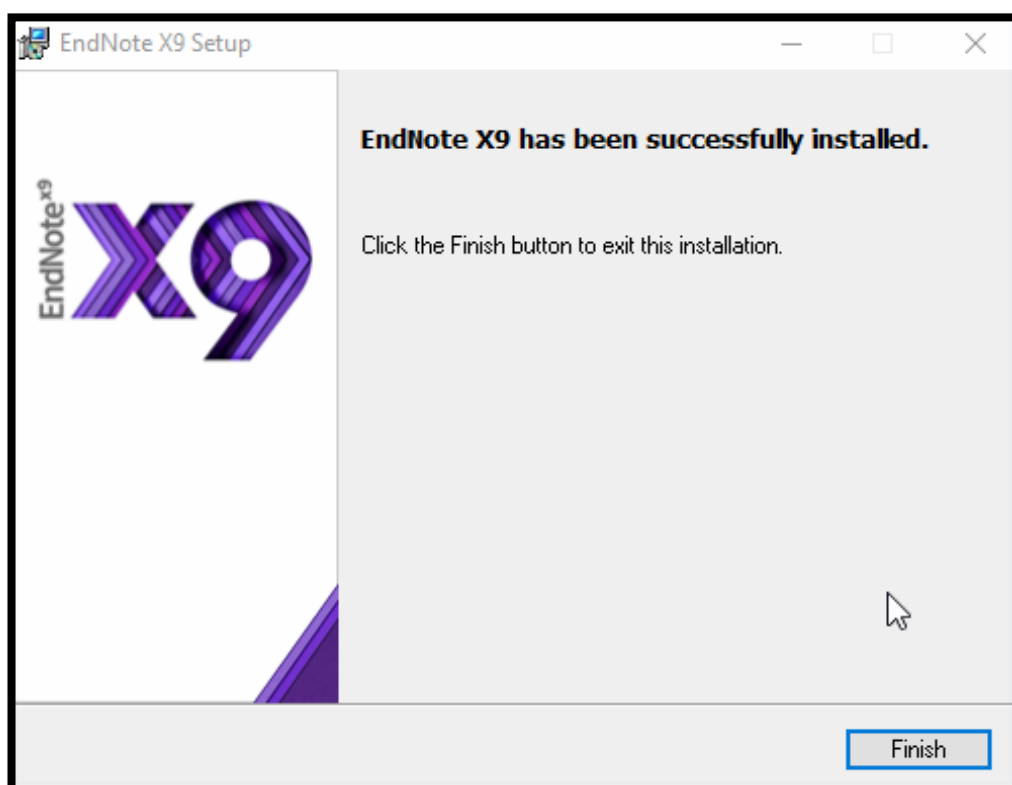


- Double-click on the **ENX9INST.msi** file. An installation wizard should launch:



The installation wizard will guide you through the rest of the process. If it asks for 'Select Installation Type', choose a **'typical'** installation.

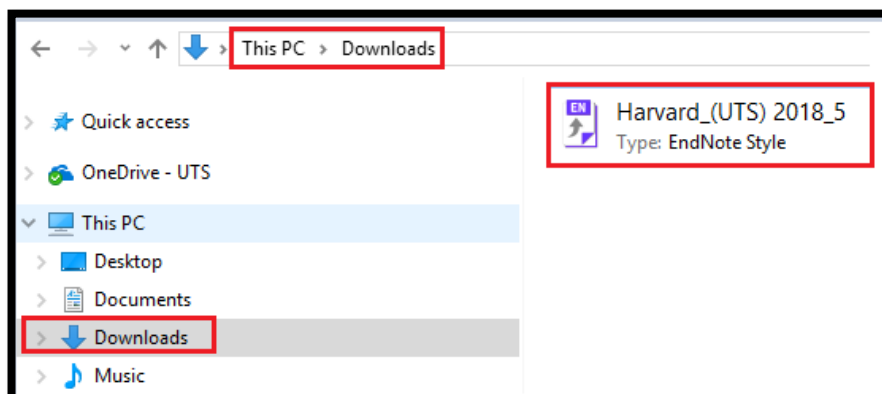
Once the installation process is complete, you will see a window that looks like this:



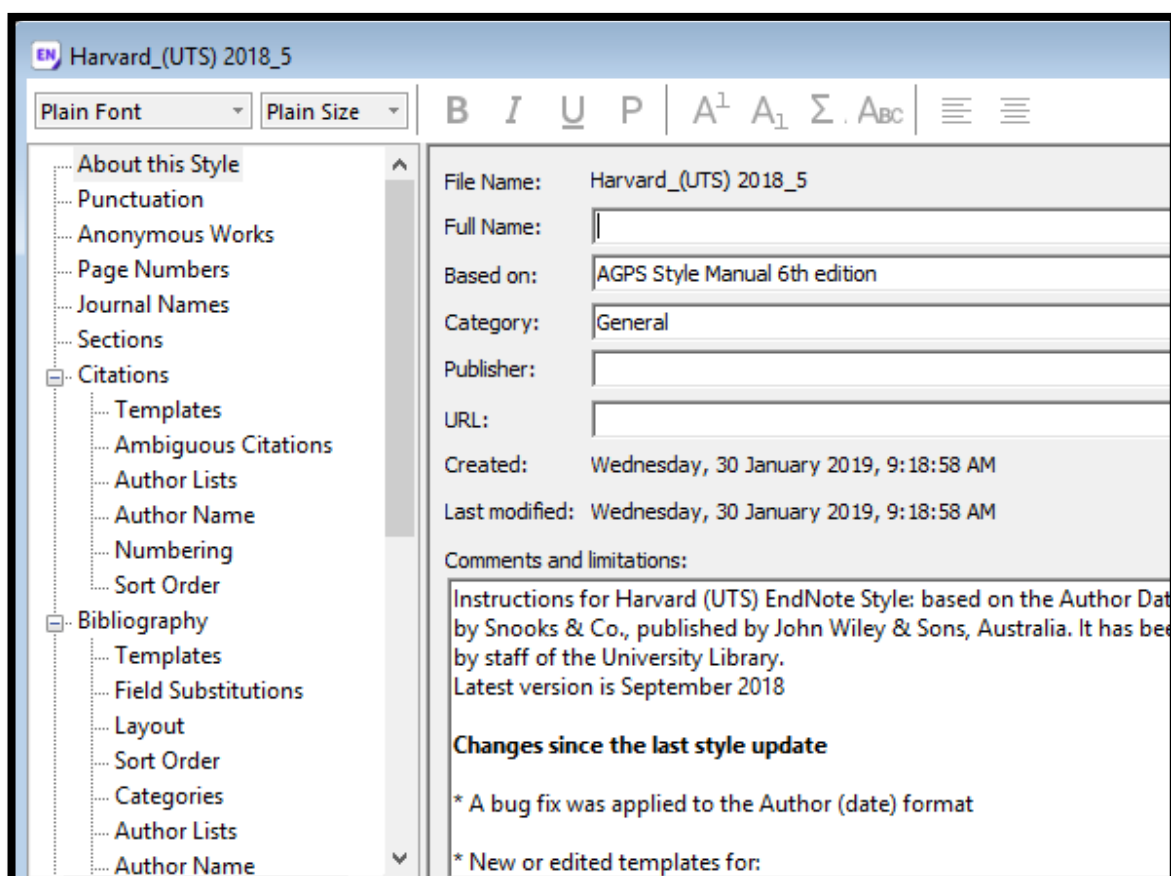
- Click **Finish**

For EndNote to display your references in your preferred style, it needs to know what that style is. Follow instructions below to download a copy of Harvard (UTS) or AGLC referencing style into EndNote.

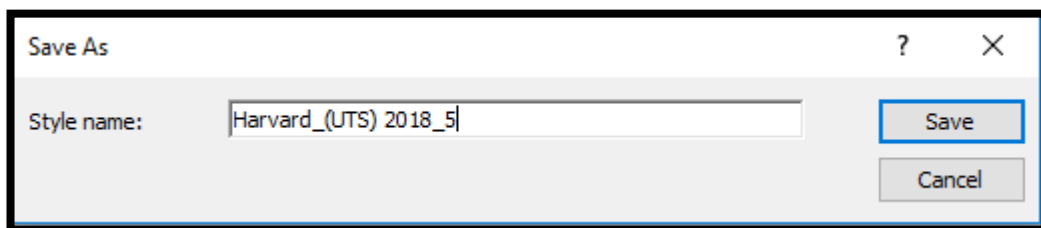
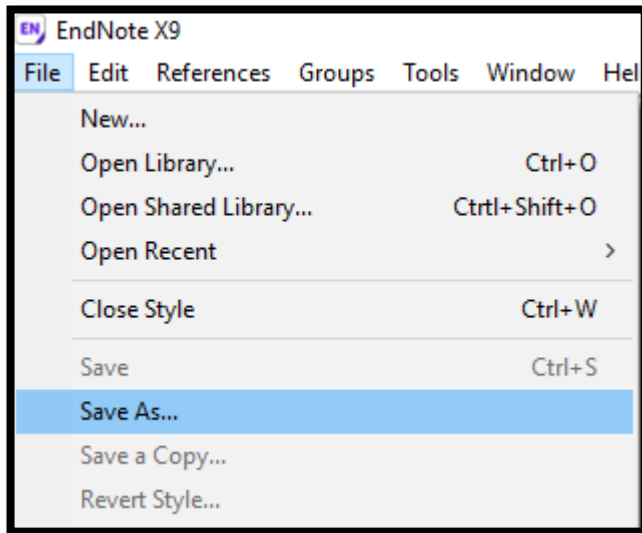
- Go to <http://www.lib.uts.edu.au/help/referencing/endnote/download-referencing-styles>
- Download the required Referencing Style file. In this example, we are using the Harvard (UTS), but the process is same for AGLC referencing style as well.
- Your downloaded style file will be stored in your PC, most likely in your PC's **"Downloads"** folder:



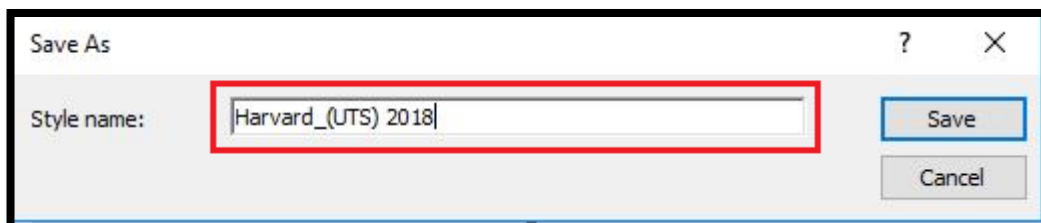
- Double-click to open the .ens file. You will see a window that looks like this:



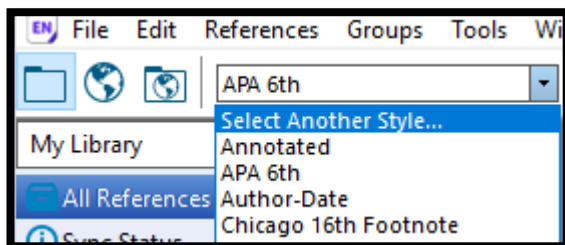
From the top menu bar in your PC, click **File > Save As ...**



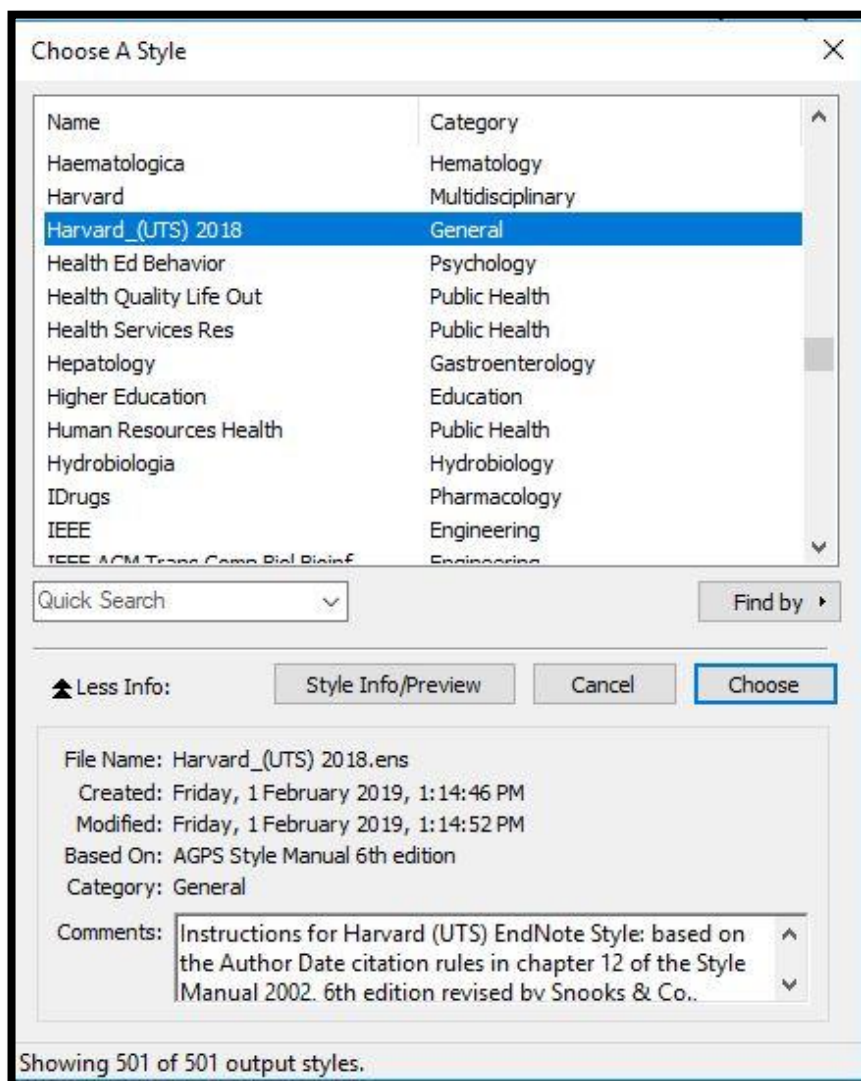
- Remove the _5 from the Style name so it reads **Harvard_(UTS) 2018**
- Click **Save**



- From the drop-down menu (top-left), **Select Another Style ...**



- Look for the **referencing style** you have just downloaded. **Select** your preferred referencing style, and click **Choose**



- Your EndNote Library should now show your preferred referencing style:

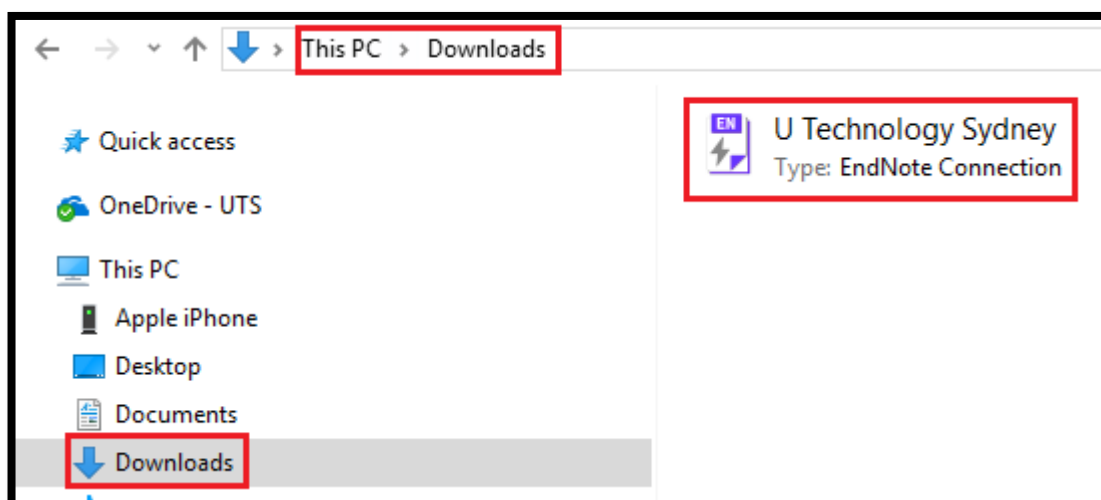


Downloading the EndNote UTS Library Connection file

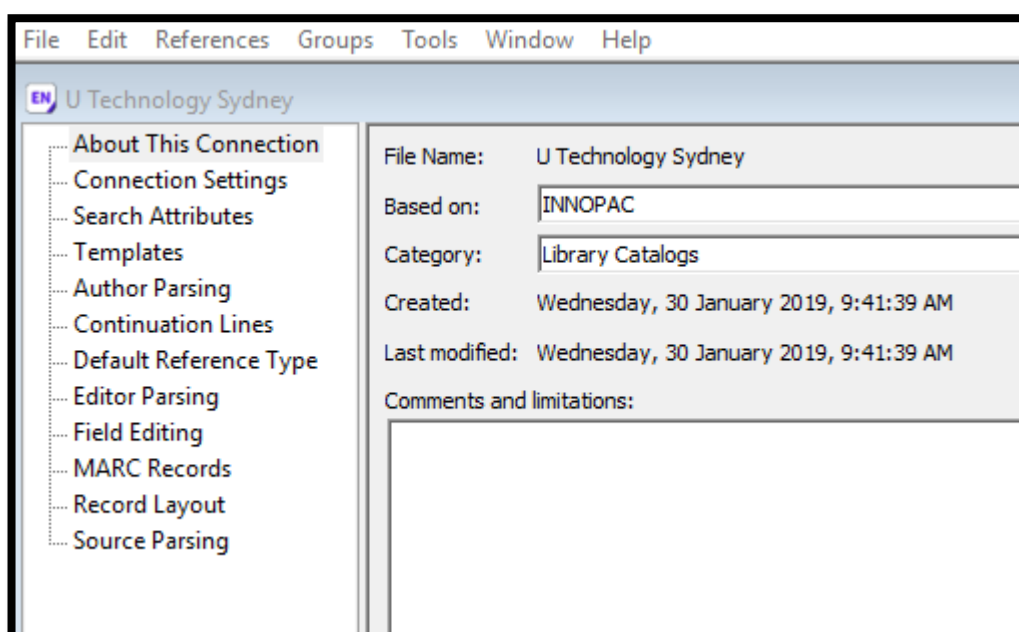
You can search the entire UTS Library catalogue directly from EndNote.

Follow instructions below to download the UTS Library connection file:

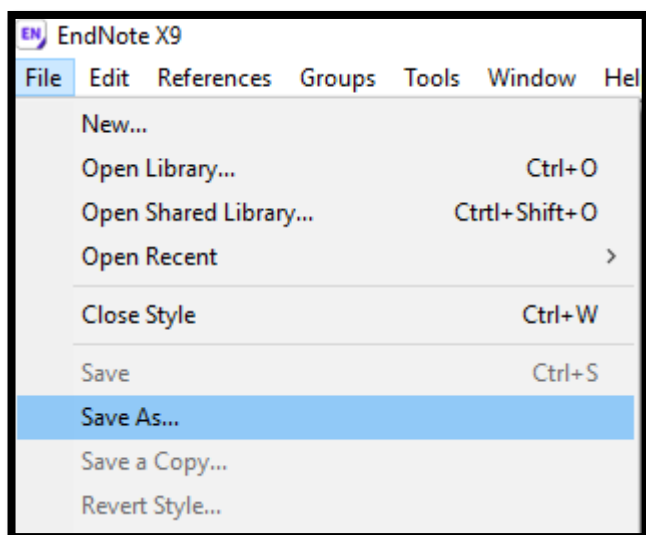
- Go to <https://www.lib.uts.edu.au/sites/default/files/attachments/page/U%20Technology%20Sydney.enz>
- Your downloaded style file will be stored in your PC, most likely in your PC's **"Downloads"** folder:



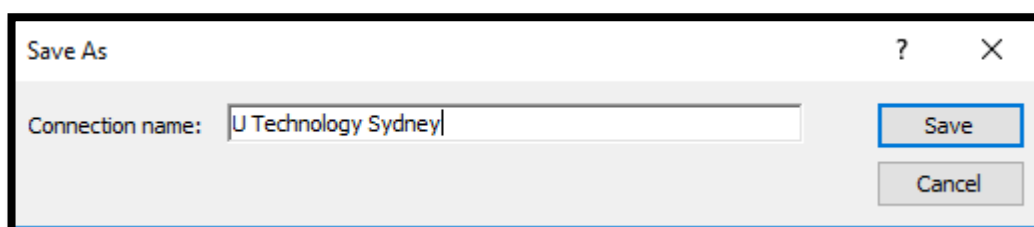
- Double-click the file to open. You should see a window that looks like this:



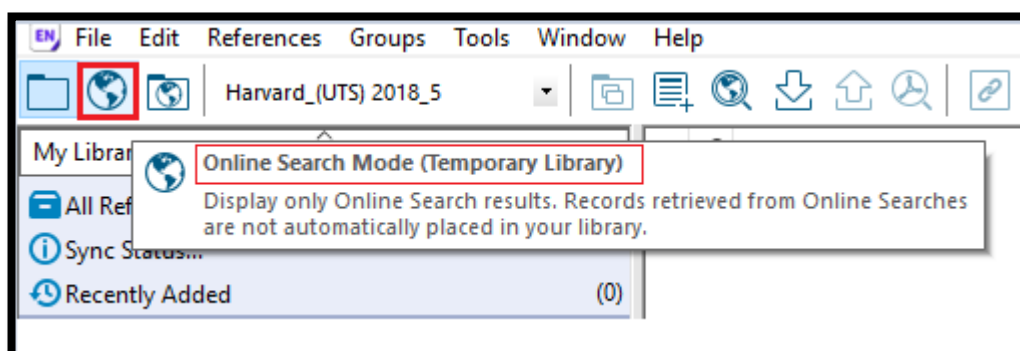
- From the top menu bar in your PC, click **File > Save As ...**



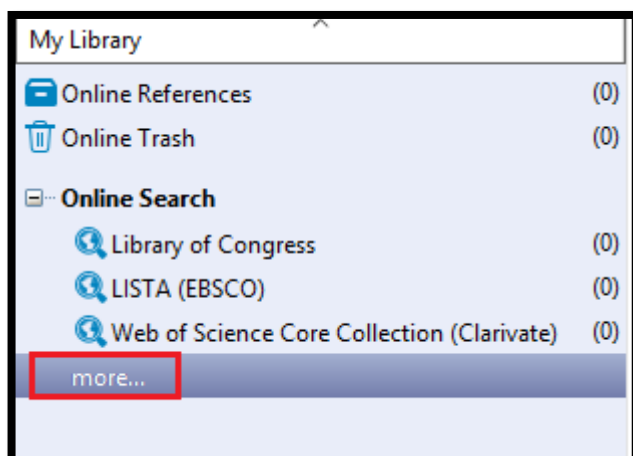
- Click **Save**



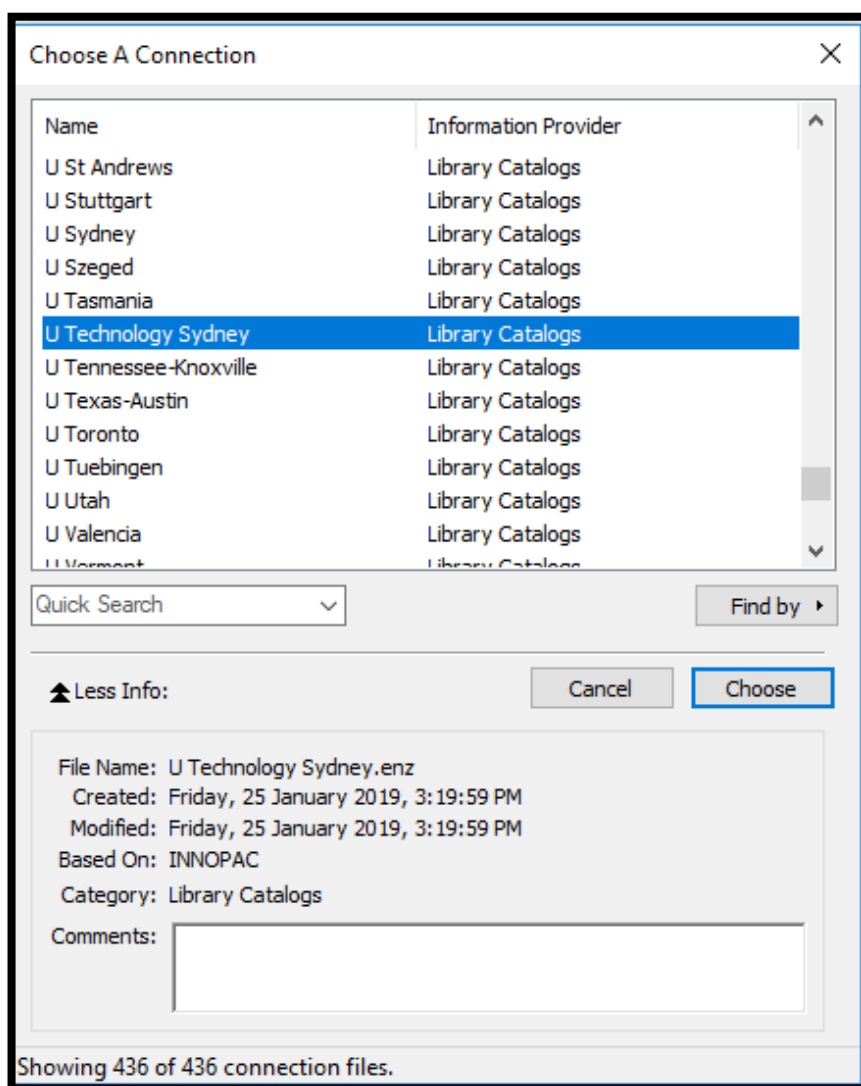
- From your EndNote Library's top menu bar, click on the **Online Search mode** icon



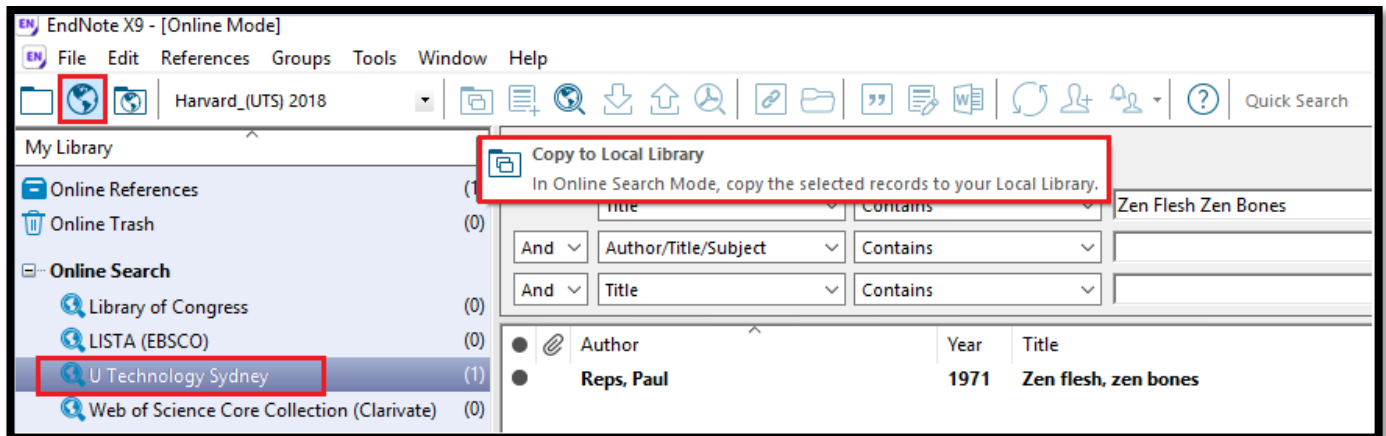
- From the left hand side navigation menu, click **more**



- Look for **U Technology Sydney Library Catalogue**
- Click **Choose**



You can now search the UTS Library catalogue directly from EndNote:



A few things to remember

- When you search for items in UTS Library catalogue in **Online Search Mode**, the results from these searches are not automatically added to *your* local EndNote Library.
 - To add items to *your* local library, select the results you want and click on the **Copy to Local Library** icon (this will be near the Online Search Mode icon).
 - Click on the **Local Library Mode** icon (next to the Online Search Mode icon) to return to your EndNote Library.
 - Click on the **Online Search Mode** icon to return to your catalogue search results.

Part 2 – Using EndNote

Creating an EndNote Library: The Library File (.enl) and the Data Folder (.data)

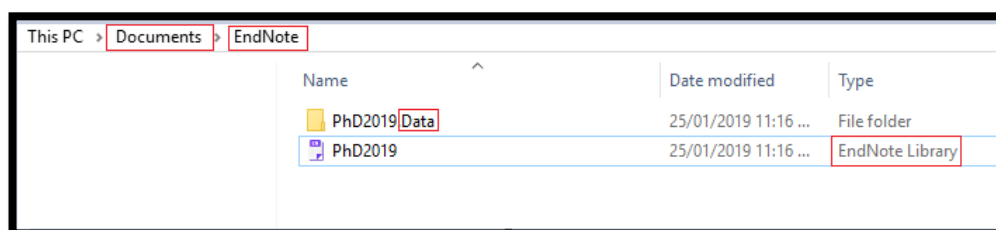


Ensure that the folder where you are storing your EndNote Library in is *not* synced over Dropbox or any similar cloud services.

EndNote doesn't work well with cloud services. The working Library and the Data folders should always be stored in your **local hard drive**.

Create an EndNote Library:

- Go to: **This PC > Documents >**
- Create a new folder and call it “**EndNote**”
- Now go back to the EndNote application. Create a new library (**File > New**) and save that library inside the newly created “EndNote” folder.
- Give the library a proper name rather than the default “My EndNote Library”. In my case I am calling it “**PhD2019**”.
- Notice that EndNote will automatically create a “**PhD2019.Data**” folder in the same location.
- Your PhD2019.**enl** and PhD2019.**Data** folders should be kept together. They should appear side-by-side in the same location like this:



EndNote Library (.enl) - is the filing cabinet where we will store all our references. You only need one of these, even if you are storing hundreds of references from several different projects (we'll see why later with Groups).

EndNote Data Folder (.data) - is where EndNote stores all your PDFs.

Adding a Referencing Output Style

Most faculties in UTS use **Harvard UTS** Referencing style. There are two exceptions:

- Arts and Social Science disciplines tend to use **APA** referencing style,
- The Law faculty uses **AGLC** (Australian Guide to Legal Citation).

Referencing Output Style File

- EndNote needs a **Referencing Output Style File** in order to display references in your preferred format.
- If you are using **Harvard UTS**, or **AGLC** – you will need to download a special referencing output style file from our website: <https://www.lib.uts.edu.au/help/referencing/endnote/download-referencing-styles>
- EndNote already comes with APA.
- For the purpose of this guide, we will be using Harvard UTS as an example.

It is possible to customise reference style or make a new reference type. If you need assistance with this, please contact your Faculty Librarian.

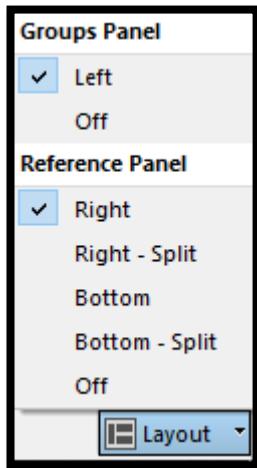
Display Options

The general rule for EndNote Display is –

- Left hand column is for filing
- middle column is where the references go
- Right/bottom has preview mode, reference quickview and pdf viewer.

Changing Display Layout

There is a Layout button located at the bottom right-hand-side of the EndNote window. Explore the options to see which panels are displayed, and whether on the right or bottom of your screen.

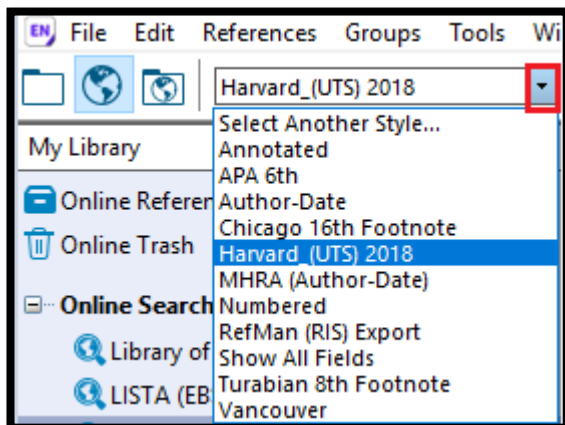


- Show the layout and the ways to display the layout – right preview is a nice way to display the layout, but you can choose your favourite.

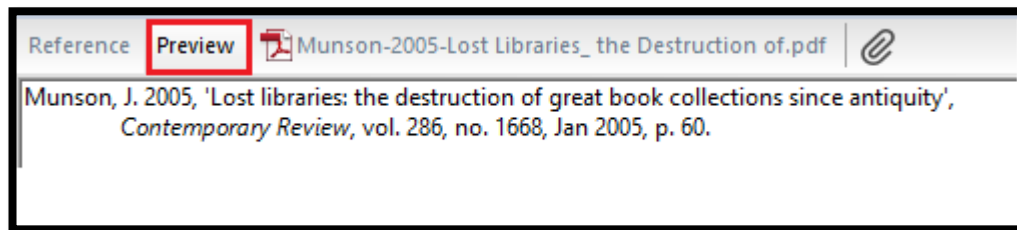
Viewing individual references

To select/change the referencing style:

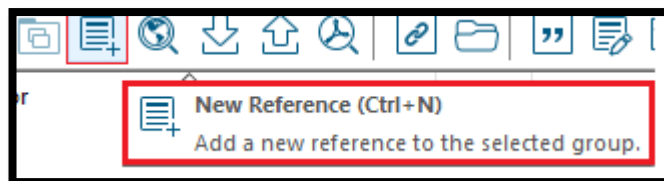
(Select Another Style ... > Harvard_(UTS))



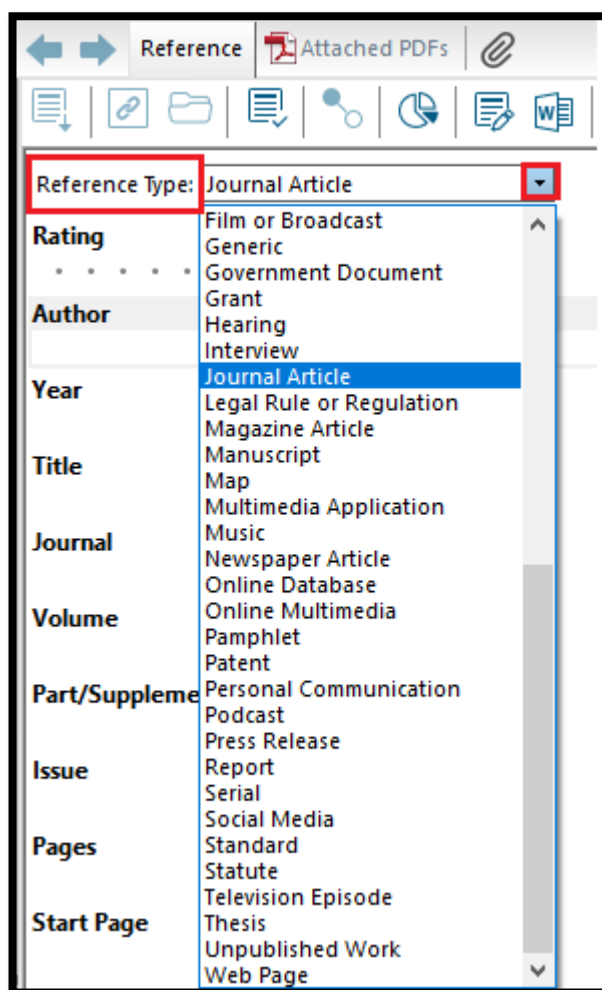
- You can preview the reference in your preferred style on the bottom right-hand-side of the screen:



Inserting references manually into the EndNote Library



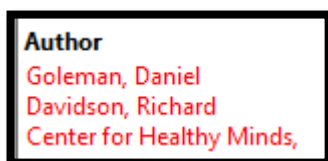
- Use  to insert a new reference manually.
- Note different reference types:



- Choose the Reference Type that most fits the reference you are typing in. This will determine which information you then have to type in (eg "Thesis" has University).
- EndNote uses what you type in to create the reference list, so it needs to know which bits are the authors, titles etc so it can combine this with the rules of the referencing styles.
- What you type in needs to be very accurate. Pay attention to spelling.
- You can leave as many fields blank as you wish, you only need to type in what will appear in the bibliography.
 - Authors each on separate lines
 - Surname, First Name or Initials
- Put in *all* authors – EndNote will work out when lists need to be abbreviated with "et al".



Put a Comma at the end of an institutional author. This tells EndNote not to treat it as a person.



- Put your own notes in the *Research Notes* field.
- If you can find the doi of the article, put it into the doi field, then run *Find Reference Updates* to locate article data on the web and automatically add it into your new reference.

UTS Library has created a [comprehensive guide](#) on manually entering referencing into EndNote. Follow this guide to ensure correct rules are used.

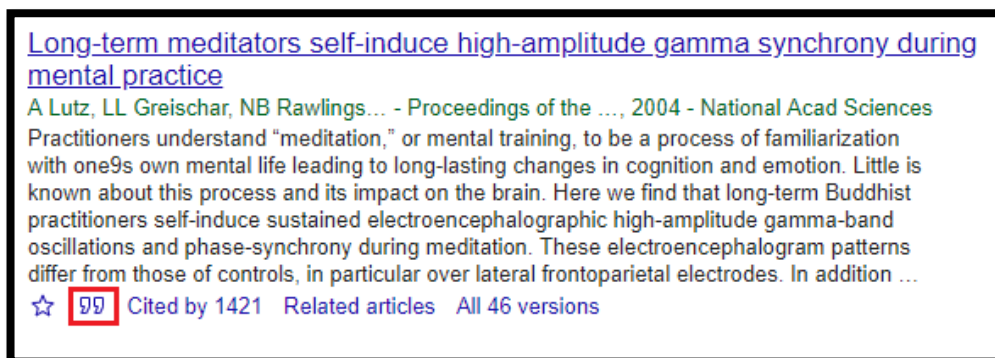
- Once you have entered all required data for that particular reference, close the window and check there citation under the *Preview* pane. Is it displaying correctly?

Import references directly from Google Scholar



If you are using Google Scholar off-campus, you will need to manually add UTS to your Library link settings. See instructions: <https://bit.ly/2RaAtTm>

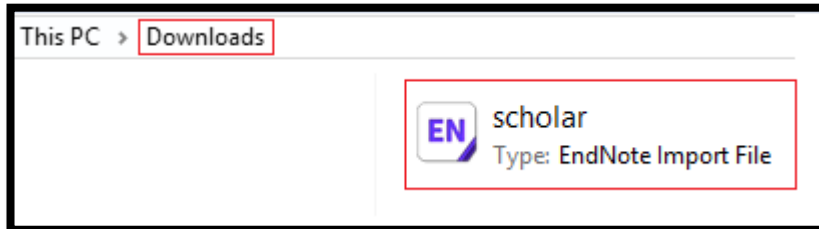
- Search for an article in Google Scholar
- Click on the '**Cite**' button which appears underneath each article:



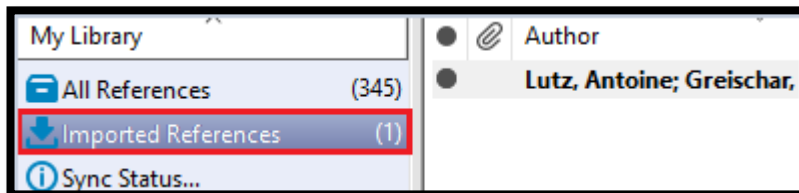
- Select **EndNote**



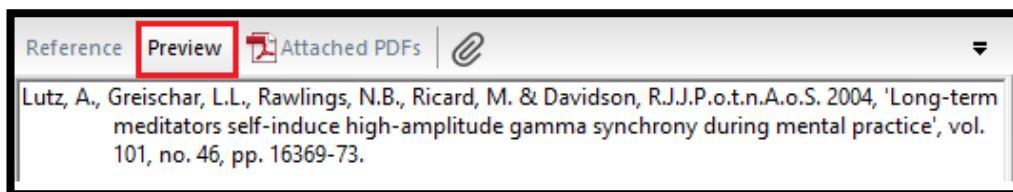
- An EndNote Import File (.enw) with the name "Scholar" will download to your Windows "Downloads" folder.



- Navigate to your PC's "Downloads" folder. Find the "Scholar" file and double-click to open. The file should open within EndNote.
- Go to your EndNote Library. You will notice that this article has now been added to the Imported Reference in EndNote:



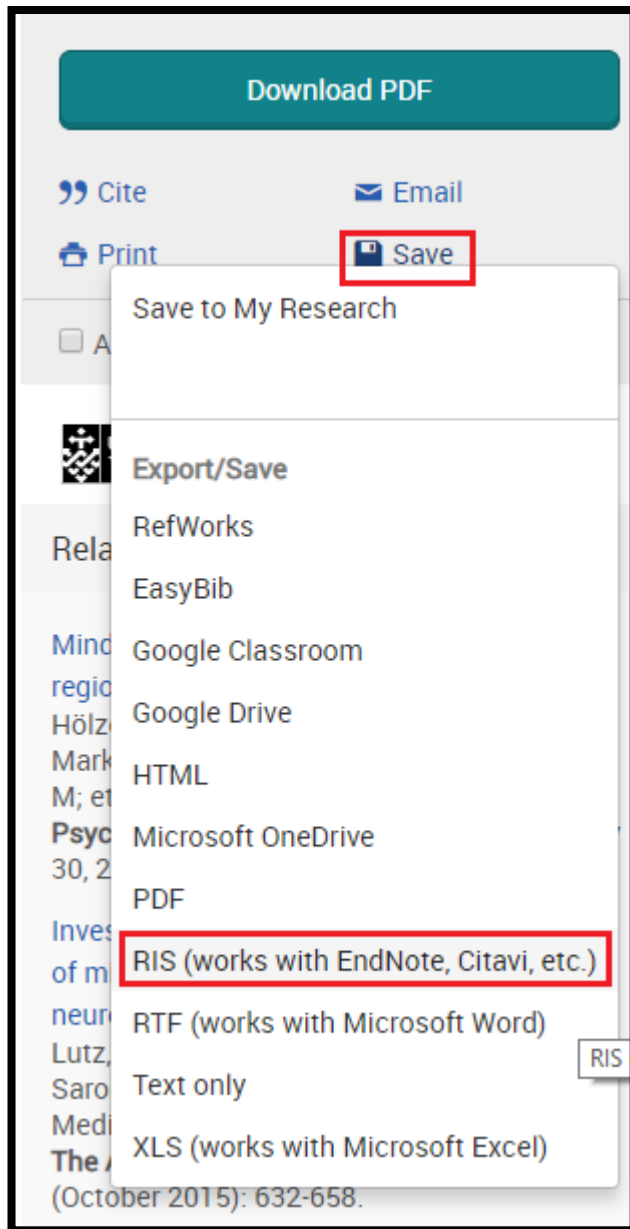
- Carefully check the **Preview** to ensure the reference is displaying correctly:



- Once the reference has been imported to EndNote, you can then delete that "Scholar" file from your PC's "Downloads" folder. It has served its purpose and is no longer needed.

Import references directly from Library Databases

- Go to UTS Library > [Find Databases](#) > Search for [ProQuest Central](#)
- Log in as normal.
- Search for an article. (Check for Duplicates. Is it already in your EndNote Library?)
- Once you found the article you are after, click on the article title.
- On the top right-hand-side, underneath “Download PDF”, you will notice that there is a “Save” button.
- Click on “**Save**” > then choose **RIS (works with EndNote ...)**



Export/Save

Output to: RIS (works with EndNote, Citavi, etc.)

Content: (where available) Citation, abstract, indexing

Sort Order: Oldest first

Bibliography: ☒ Include bibliographic citations at the end

Citation style: BibTeX

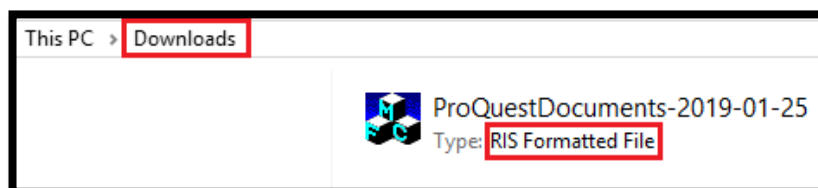
Include: ☐ Recent searches
☐ Cover page/header
☐ Table of contents
☐ Document numbering

Opens a file in your citation management tool. You may be asked which program to use to open the file.

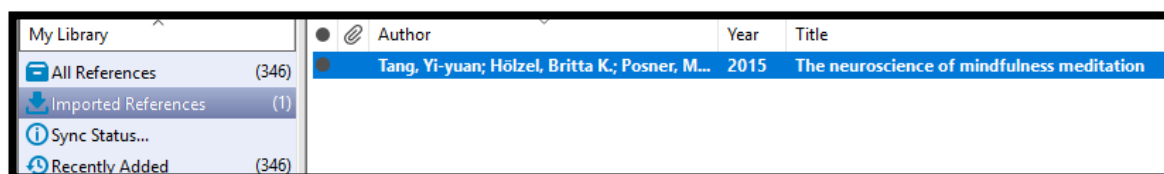
By entering all required information you consent to its use by ProQuest to enable features and functionality.

Cancel Continue

- Click **Continue**
- The **RIS** File will download to your PC's **Downloads** folder:

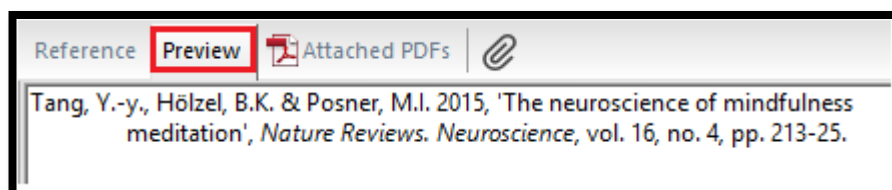


- Navigate to your **Downloads** folder, and double-click on the RIS file to open it in EndNote.
- You will notice that the reference has now been imported to the EndNote Library:



The basic principles are the same in all databases: select articles, click on the export/save button, select EndNote as your software, export/OK.

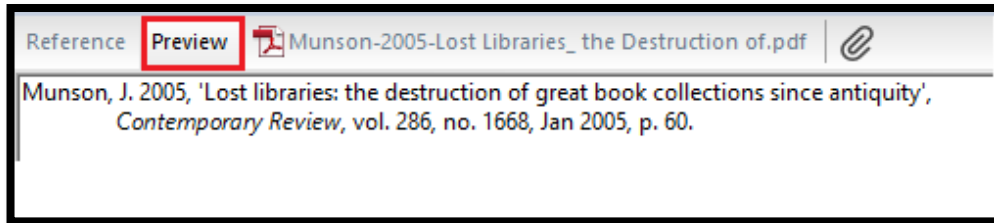
- Carefully check the *Preview* to ensure the reference is displaying correctly:



Editing an existing reference

Carefully check, and if necessary edit, each reference as soon as it is in your Library. Use the Reference and the Preview panels for this.

- To edit a reference (including to change reference type), double click on it.
- Change styles using the drop down styles menu in EndNote. See what references look like in the new style using the *Preview* tab.



Again, refer to UTS Library's [comprehensive guide](#) on manually entering referencing into EndNote.



- It is possible to add **custom fields** into a reference to suit your needs. For example, you may want to add a custom field for methodology or extra notes to keep you organised. If you need help with this, please contact your faculty librarian.
- Some reference styles require full journal names, while others require abbreviated journal names. You can teach EndNote how to handle journal names and abbreviation by updating the **Term List**. For instructions, see: <http://www.lib.uts.edu.au/help/referencing/endnote/using-endnote#termlists>

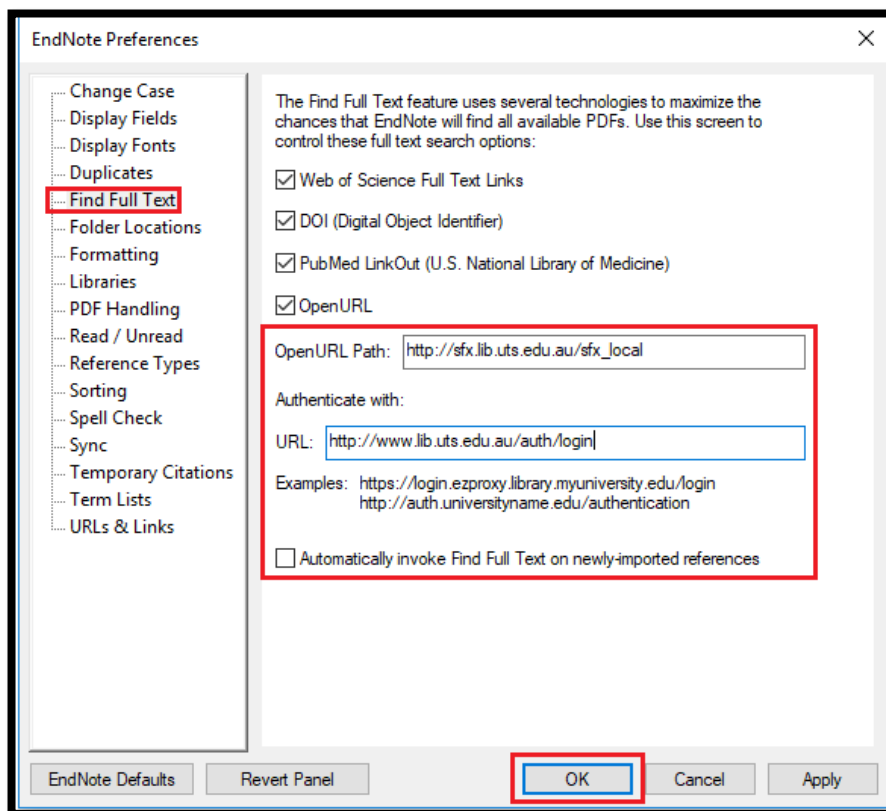
Finding Full Text

Find Full Text searches UTS Library databases (and the web more generally) for PDFs of the articles in your EndNote library. Detailed instructions are on our website:

<https://www.lib.uts.edu.au/help/referencing/endnote/using-endnote#finding-full-text>

How to set Find Full Text Preferences

- Select Edit > Preferences > Find Full Text
- Type http://sfx.lib.uts.edu.au/sfx_local into the OpenURL Path box, and
- Type <http://www.lib.uts.edu.au/auth/login> into the Authenticate with URL box
- Remove the tick from the Automatically invoke Find Full Text on newly-imported references box (this is because Find Full Text can take a bit of time sometimes and it's better to choose for yourself when to run it)
- Click **OK** to save



Running Find Full Text

- Select one or more references in your EndNote library, and click the **Find Full Text** button



- Login with your UTS ID and password, then click **continue**.

EndNote will start to search for full text. If the full text is available on open access or from one of our subscribed databases, the PDF will attach to the article. Note that this only works for articles, not generally for books or book chapters.

Sometimes a link to online text is added to the reference when the PDF version of the text is not available. These links may not always work!

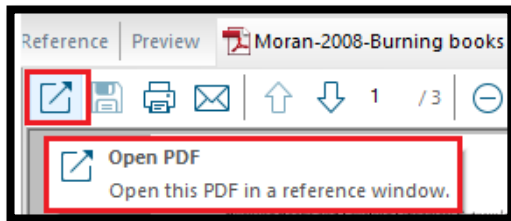
You'll notice that it takes about 15 seconds per reference to search for full text so be prepared to wait. The presence of an attachment is indicated by a paperclip symbol in the far left column of your EndNote library.

You can use the Attached pdfs panel to view your PDFs.



Mention:

Selecting the Open PDF icon here allows easy reading, and also allows you to highlight sections of PDFs and add comments into them. Do not go into demoing this. Just mention this can be done, and those comments can be searched.



Attaching PDFs manually to already existing references

- Go to the Database you are using.
- Download and save the PDF in your computer.
- Drag the saved pdf file and drop it onto that reference in the library. (This actually works for files of any format, not just pdf).
- A paperclip icon will appear next to the reference indicating that it now has a PDF attachment.



FYI - These PDFs are copied to your *.Data* folder, which sits alongside the EndNote Library (**.enl**) file. Which means you can delete the PDF from its original location now that it has been copied to your Data folder.

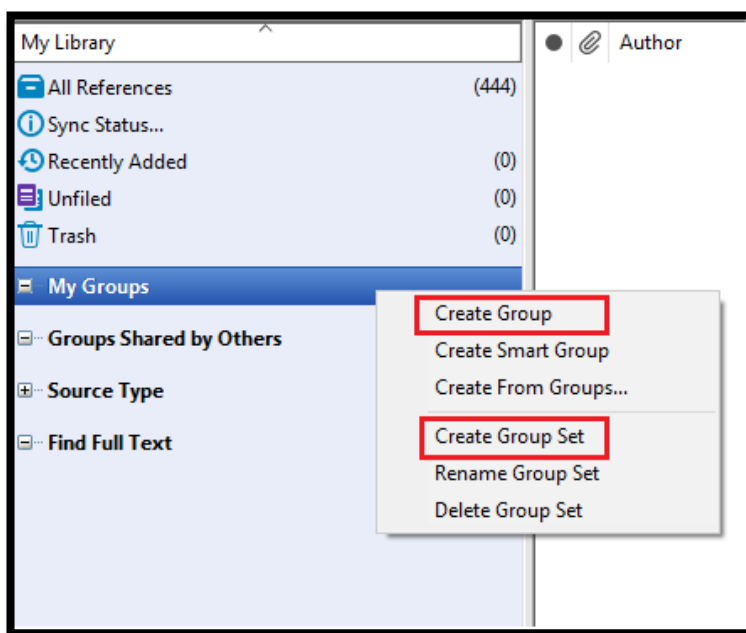


Do not delete anything from the EndNote Data Folder. It's best that you do not touch this folder at all!

Organising References in Groups and Group Sets

Groups are a very useful way of categorising and organising your references. Think of them as ways of dividing up your EndNote Library into *sub-libraries*. This can be useful for combining methodologies or area of study from different papers or projects.

- Right click in the *Groups* area to create and name some *Groups* or even *Group Sets*. Groups can be dragged under *Group Set* headings.



- Select *All References* and drag some articles into some groups. Use control to select more than one. An article can be in several groups.



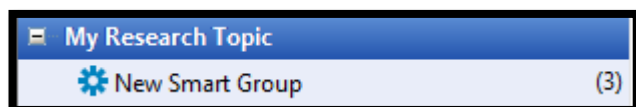
Articles can be deleted from groups but always remain in *All References*.

- Click on a Group's name to see what is in it. *Unfiled* shows you which references have not been allocated to any group.

Organising References in Smart Groups

A *Smart Group* is a group where you set up a rule in advance that automatically determines what goes into the smart group.

- Right click in the *Groups* area to create a new Smart Group.



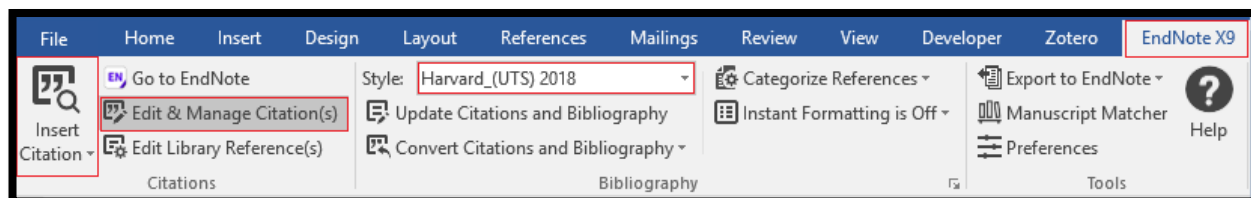
- Enter desired rules. For example, if the abstract contains the word “qualitative” then group these studies together in a single Smart Group called “Qualitative Studies”.



Be careful about deleting records from smart groups as this deletes them from *All References* too! You have to go to the *Trash* group to recover them.

Inserting selected references in a Microsoft Word document

- Open a blank Microsoft Word document.
- Point out the EndNote tab and the icons within it. This is the EndNote plugin that allows EndNote and Microsoft Word to talk to each other.



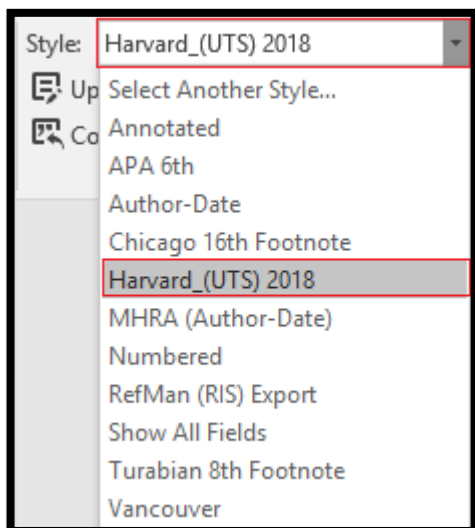
- Type some text, select a reference in EndNote, and insert it into Word. Point out the *in-text reference* and the *bibliography*.
- Type some more text, go back to EndNote and select several references this time. Insert these references.

Note that the inserted references, and the bibliography, are grey – they have hidden field codes behind the text that prevent you from editing them as normal Word text.

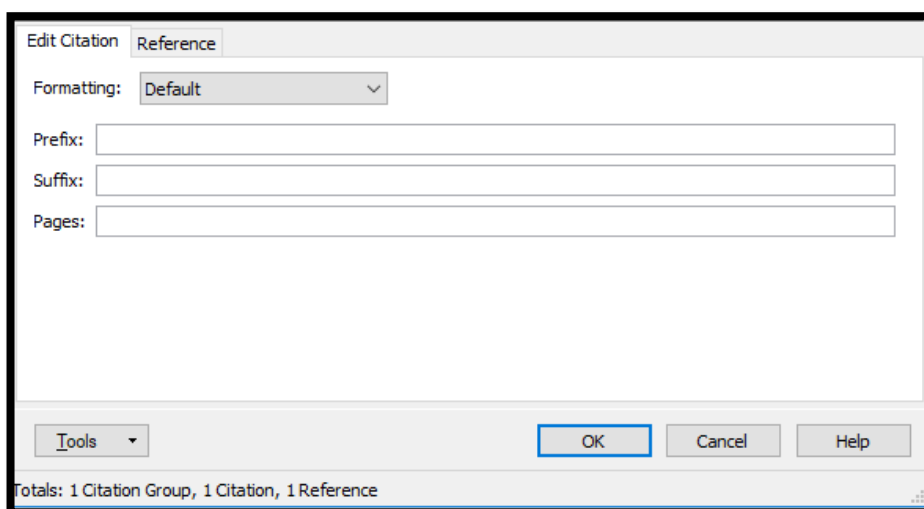
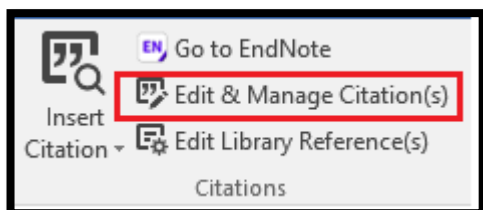
- There is also an *Insert Citation icon* in EndNote - so you can do this from there if you are sure your cursor is in the right place.



- Change styles using the drop-down menu in the *style* window in Word. This changes the style of the whole document – all the in-text citations, and the reference list.



- Click on one of the in-text references and select *Edit & Manage Citations*. This button be used to add page numbers for quotations, in either the *Pages* or the *Suffix* box.



Pages only works for Harvard (UTS), APA, and a few other styles.

- Using *Suffix* always works but then *you must also add commas, p or pp as well as the page numbers*. *Suffix* is also good if they want to add a reference to a particular paragraph, section or chapter rather than to page numbers.
- Can also add a prefix, eg *cited by*.
- Type in for one of your references “[the author of one of your references] says this is great”, and then insert the appropriate reference after the author’s name.
 - Point out the repeated name, select the in-text reference and click in *Edit & Manage Citations*. Use the drop down Format menu to select *Exclude Author*, then click on OK. This hides the unwanted extra author name. Note the other options in the drop down.



Tips

- To remove an in-text reference, use *Edit & Manage Citations*, find it in the list of citations and use the drop down menu next to it to remove it.
- Correct errors in citations or in the bibliography by correcting first in your EndNote library and then using Update Citations and Bibliography in Word.
- Add extra citations into an already inserted citation by simply inserting on top.
- Be very careful how you cut and paste – your document will be full of (invisible) field codes. EndNote recommends unformatting the whole document before cutting & pasting but as long as you ensure that there is regular Word text on either side of any EndNote citations when you cut and paste, you should be OK.
- You can extract any EndNote citations from a Word document into any EndNote library using Export Travelling Library.

Exporting references as a standalone bibliography

To create a list of references without in-text references:

- Select the references you want in EndNote (they should turn blue when you do this. You can use Command-A to select all of your references).
- Right click on the references and choose ‘copy formatted’.
- Now, go to Word, place cursor where you want the reference list to appear, and paste.

This is a quick way of compiling a standalone bibliography without having to worry about EndNote codes.

Thesis formatting and compiling multiple documents

During the course of your research project you may produce multiple word documents with individual chapters – each with separate bibliographies.

Towards the end of your research project you may need to compile these different chapters into a single word document. Which means, you will need to consolidate your bibliographies.

This consolidation can be done using EndNote. The instructions are on our [website](#).

If you need assistance with this, please contact your Faculty Librarian.



Back-up your EndNote Library and the Data Folder

This is how you create a back-up copy of your EndNote Library:

- Click File → Compressed Library (.enlx)
- Give the file name a date, before saving.
- Save it somewhere 'other' than where the original library is stored.

Accessing your EndNote Library from multiple computers

How do you access your thesis, or papers that you are working on between computers? Do the same with your EndNote library. Here are a couple of ideas:

- You can store these Compressed Libraries in your Dropbox, iCloud or Google Drive folders as back-up.
- You can also store these compressed libraries in portable USBs or hard-drives
- You can then access these stored libraries from any computers you choose to use.



Whichever strategy you choose, don't forget to back-up your EndNote Library regularly.

Sync your Library with EndNote Online

You can register for a free EndNote Online account through the Web of Science database, and then store references in an online EndNote Library.

References can be synched between this EndNote Online library and the "desktop" EndNote libraries on various machines, and also inserted into Word from either.

We strongly recommend you create an EndNote Online account. Don't do it in the class as it takes fair bit of time. For detailed instructions, please see UTS Library's EndNote Online page:

<https://www.lib.uts.edu.au/help/referencing/endnote>

Sharing your 'entire EndNote Library', or 'Selected Groups' with someone else

Once you have create an EndNote Online account, you can then share your entire EndNote library, including references, PDFs, and annotations with anyone using EndNote (up to 100 people). Everyone can add to, annotate and use the library at the same time and track who is making changes.

From EndNote 9 onwards, you can share just a portion of your library with new *group sharing* options.

To Share: In EndNote, select **File > Share**, log in to your EndNote online account if you have not already done so, and enter the email addresses of the people you want to collaborate with. These must be the email addresses they use for their own EndNote online accounts.

Ask a Librarian

If you have questions about EndNote or need assistance with anything please contact us by visiting:

<https://www.lib.uts.edu.au/help>

