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ENDNOTE X7

System requirements and Configuration

System requirements
EndNote X7 runs under the following operating systems:
- Windows XP 2002 with at least Service Pack 3 installed
- Windows Vista (32 or 64 bit versions)
- Windows 7 & 8 (32 or 64 bit versions)
- Macintosh operating system version 10.6 (Snow Leopard) or later

Hardware Requirements:
- A personal computer with a Pentium (or compatible) or Intel-based Macintosh, 450-MHz or faster processor
- A minimum of 256 MB of available RAM
- A hard drive with at least 180 MB of free space for Windows or 400MB for Mac.
- An Internet connection and web browser is required to use: the Direct Export feature from online databases, the Find Full Text feature, or to access and transfer data from EndNote Web.
- Unicode compliant

Word processor compatibility
EndNote X7 is compatible with the following word processing software:
- Open Document Format (ODT) documents created with OpenOffice.org Writer 3
- RTF files created with most word processors, including: Microsoft Word, WordPerfect, OpenOffice.org Writer, and StarOffice.
- EndNote for Macintosh is compatible with:
  - Apple iWork Pages ’09

Check the EndNote X7 guide for complete information on system compatibilities.

Download EndNote X7: A download link is available from:

Library Home Page | Research | LibGuides-help to research your subject | Bibliographic Referencing Software | EndNote.

Note: EndNote X7 requires additional configuring for law. See the tab EndNote & Law.

Cite While You Write: If Microsoft Word 2007, 2010 or 2013 is installed on your computer, the Cite While You Write Add-In is installed automatically. A tab and sub menu will appear in Word (in a Mac this is a floating toolbar). After loading EndNote X7, open Word and check there is a tab for EndNote X7.

Database filters and Connection files: EndNote X7 does not contain a full list of databases. See further information in these notes at Importing/Exporting Database Search Results to EndNote.

EndNote X7 Guide
When you install EndNote the full EndNote X7 guide is also loaded onto your computer. This provides all the information you need to get started or find out specific answers to questions.

To open the guide from My Computer, go to Program files | EndNote X7 | EndNoteX7WinHelp.pdf.
Learning Objectives

1. Create, open and save a library.
2. Add new references to your library manually.
3. Add new references from online databases using both the Direct Export and the import file/folder function.
4. Edit, search, sort and organise your references.
5. Use EndNote with Word to create in-text citations or footnote citations and to format a bibliography in a required style (e.g. APA6th).
6. Identify EndNote Help options.

These notes have been written using EndNote X7 with Windows 7 and Word 2010.

INTRODUCTION

With EndNote X7 you can:

- Create a library to organise, store and manage your references (citations).
- Add references to your EndNote library by:
  1. Manually entering references
  2. Direct Export from online databases and library catalogues
  3. Using EndNote filters to import a saved reference file from a database search
- Insert citations into your Word document whilst automatically creating a bibliography in your required style (if the style permits).

The EndNote Library

An EndNote library is a collection of references, each containing the information required to create a bibliography. Additional information such as keywords, abstracts and notes, can also be stored with these references, this can help you to manage your references.

There is no limit to the number of references you can create in an EndNote library. It is recommended that the number not exceed 100,000 to maintain efficient performance of the database.

There is no limit to the number of libraries you can create, assuming that you have the memory space to store them. However, we recommend that you keep all the references you cite in a paper or thesis in one main library, as merging the bibliographies can be tricky.

Each library is a separate file that can be moved, copied, renamed or deleted.

Creating, Opening and Saving Libraries

It is possible to create more than one library and to have more than one library open at the same time.

To open EndNote and create a new library

1. Select Start then the menu All Programs | EndNote | EndNote Program. If it is the first time you have used EndNote, select Create a new library.
2. Select the location where you want to store this library (e.g. to your C: or other drive) from the **Save in** drop down list. Enter a name for the file in the **File name** field. Click **Save**.

3. Click the **Close** button.

4. When you open EndNote after you have created a Library click the **File cabinet icon**, to ‘Open an existing library’. If a blank EndNote window opens, select the menu **File | New** or **File | Open**.

Your new library will look like this:

To create a new library from within EndNote

1. Select the menu **File | New**.

2. Select the location where you want to save this library (e.g. C: or other drive) from the **Save in** drop down list. Enter a name for the file in the **File name** field.
3. Click the **Save** button.

**To open a library from within EndNote**

1. Select the menu **File | Open**.

2. A list of file names for recently opened libraries is listed underneath **Open Library**. Select the required library name from the **Open** menu to open the library, or select **Open Library** to browse for the library.

**To close a library**

- Select the menu **File | Close Library**.

OR
- Click the grey or red X in the top right corner of the EndNote library window (if the window is maximised it will be grey, and red if not). You will be prompted to save the library. Click in the box next to ‘Don’t show this message again’ and click **Save**. Once you do this EndNote will automatically save your library when you close the library window.

![EndNote Library Window](image)

**Sample Library**

EndNote provides a sample library (Sample_Library_X7) for you to practice on.

**To open the Sample Library:**

1. From EndNote, select the menu **File | Open | Open Library**.

2. Navigate to the EndNote X7 folder, usually in the Program Files folder on the C:\ drive, then open the **Examples folder**.

3. Select the file **Sample_Library_X7.enl** and click the Open button.

**Backing up your Library**

As with any important file it is vital to keep a back-up copy of your library. Regularly save your Library to a USB. If you are moving or copying your library, you need to move or copy the library file (with the extension .enl) and the associated Data folder (with the extension .data). Both the library and the data will have been saved in the same location.

![Backup Files](image)

**To create an exact copy of your library:**

1. With a library open in EndNote, select the menu **File | Save a Copy**.
2. Name the new library and navigate to the location where you want to save it. Storing on a USB is recommended.

3. Click the Save button.

4. Ensure both the Library .enl and the Data folder are saved. This should happen automatically.

**Note:** EndNote libraries are created with the format filename.enl where ‘filename’ is the name you assign and .enl is the file extension for an EndNote Library.

If something does happen to your computer that causes the loss of EndNote and/or your EndNote library data, you can reload EndNote and then import your backup copy to a new library.
ADDENDUM REFERENCES

Many of the functions you will use when working with references in your library can be found under the References menu. This menu allows you to Add, Edit and Delete references. It also offers functions for Attaching files, URLs and Figures.

Setting the default Reference Type

You can set the Default Reference Type to specify which template will open when you manually add references.

1. Select the menu Edit | Preferences | References Types.
2. Select a Default Reference Type from the drop down list.
3. Click OK.

NOTE: You need to select the correct reference type every time you manually enter or import a reference. Journal article is the default, other commonly used ones are: Book, Book section, Thesis, and there is now also Blog. The Unused types at the bottom of the list allow you to add custom types as well. For information about modifying and customising Reference Types see Appendix 2: EndNote Preferences.
Selecting the Output Style (citation style)

When EndNote X7 is first loaded, only a limited number of citation styles are displayed in the Output Style box on the toolbar. If the citation style you require is not there it can be added.

1. Select the menu Edit | Output Styles | Open Style Manager scroll to the name of the style and place a tick beside it e.g. APA 6th
2. Close the dialog box. This will now appear in the Bibliographic Output Style box on the EndNote toolbar.

Note: Additional styles are available from the EndNote website.

1. Go to http://EndNote.com/downloads/styles
2. Select or search for the required style.
3. Click on Download.
4. Save the style in the EndNote styles folder on your computer, similar to: C:\Program Files\EndNote X7\Styles.

Adding a New Reference Manually

To add references manually the EndNote library must be open.

1. Select the menu References | New Reference or press the shortcut keys CTRL+N. This opens a new reference template.
2. Select the **Reference Type** from the drop down list.

![Reference Type list](image)

3. To add the information into the template, click in the appropriate field (Author, Title, etc.) and start typing. Use the Tab key to move between fields.

4. To save the information:
   a. Select the menu **File | Save** or click the grey X in the top right corner of the **New Reference** template.
   
   OR
   b. Click the grey or red X in the top right corner of the **New Reference** template window (if the window is maximised it will be grey, and red if not). You will be prompted to save the record. Click in the box next to ‘Don’t show this message again’ and click **Save**. Once you do this EndNote will automatically save a new Reference when you close the template window.

![EndNote X7: [New Reference](image)

**Note:** For information about entering information into the Reference template see Appendix 3: The Reference Template.
Spell Check

The spell check feature will check spelling in all of the reference template fields except Author, URL, Figure, and File Attachments. This is not an automatic feature, but one which you need to perform manually. To set Spell check preferences for EndNote:

1. Select the menu Edit | Preferences | Spell Check | Options.
2. Tick the boxes for spelling options and select language type.
3. Click OK.
4. Open the EndNote record(s) you wish to check. If you want to check only a portion of the text, highlight only that text.
5. Select the menu Tools | Spell Check.
6. If EndNote finds a word that is not found in the selected dictionaries, it displays a Check Spelling dialog box.
Importing/Exporting Database Search Results to EndNote

Apart from adding references to a Library manually, it is also possible to ‘export’ selected references from research databases and catalogues.

There are two ways of transferring citation information from an electronic research database/catalogue into an EndNote Library:

- **Direct Export**
  Direct Export allows for the direct transfer of citation information from the database to your EndNote library. Direct export enables the downloading of references directly into an EndNote library, without the need for saving these as a text file.

- **Importing Saved Files**
  References can be saved as text files and then imported into EndNote using an appropriate Filter. This method is good for databases that do not offer Direct Export, or for when you are using a computer that EndNote is not installed on.

Instructions for using direct export with MultiSearch and the following vendors and databases are included in this section:
  - EBSCOhost
  - Informit
  - JSTOR
  - Ovid
  - ProQuest
  - ScienceDirect
  - Scopus
  - Web of Science
  - Sage journals
  - Google Scholar

This section also includes instructions for saving references as text files from Factiva and PubMed Central; and instructions for importing these text files into EndNote.

**Note:** The way that a file behaves when downloaded (exported) from a database depends on the internet browser you are using. EndNote files may open automatically but if they don't you can open them from your browser’s download list, or by navigating to the Downloads folder on your computer.
**Direct Export from MultiSearch**

1. Conduct a search using MultiSearch which is available from the Macquarie University Library homepage at: [http://www.mq.edu.au/library](http://www.mq.edu.au/library)

2. Select records by clicking on the Star beside the titles on the search results page.

3. Click on e-shelf to retrieve a list of the selected records.

4. Select records by clicking in the checkboxes beside each record in your e-shelf.

5. Select **Push to Export RIS** from the ‘Select how to save’ drop down box and click Go (Push to EndNote will export the records to EndNote Web).

6. The ‘Push to RIS’ window will open. Leave encoding as **UTF-8** and click **OK**.

7. If the file does not open automatically you can open it from your downloads list.

8. The records may transfer directly to EndNote or you may have to select a Library in which to place the records.

9. In EndNote, the results will be displayed as Imported References. Click All References to view the full Library again.
Direct Export from EBSCOhost

Databases in EBSCOhost include: Academic Search Premier, Business Source Premier, CINAHL, Communication Mass Media Complete, Econlit, Film and Television Literature Index, Historical Abstracts, Middle Eastern & Central Asian Studies, MLA International Bibliography, Philosopher’s Index, Psychology and Behavioral Sciences Collection.

1. Select the records from the results list by clicking the Add to folder icon to the right of each record.

2. Click the Folder at the top of the page to view a list of the selected records.

3. Click in the check boxes on the left to Select references.

4. Click the Export icon (with the green arrow).

5. Select ‘Direct Export in RIS format’ and click Save.
6. If the file does not open automatically you can open it from your Downloads list.
7. The records may transfer directly to EndNote or you may have to select a Library in which to place the records.
8. In EndNote, results will be displayed as **Imported References**. Click **All References** to view the full Library again.

**Note:** Direct Export from EBSCOhost is not perfect and data may be filtered into the wrong field. When records have been exported into a 'Generic' Reference Type you can improve the results by changing the Reference Type to the correct one for the record, e.g. journal article. You should always check that the data has been imported into the correct fields, and you may still need to move data around within the reference. Alternatively save the references as a .txt file and use the **Import** process to import it into your EndNote library. See the next section on Importing to EndNote.

**Direct export from Informit databases**

Databases include A+ Education, Australian Public Affairs Full Text, AGIS Plus Text, Family Health & Society.

1. Select records by clicking in the checkboxes beside each record in the database search results list.
2. Click on the **Save** button at the top of the results list. The Save Records page will open.
3. Select **Complete Record** for the **Fields to save** box and **EndNote direct** for the **Output format** box.
4. Click **Save Records**.
5. If the file does not open automatically you can open it from your Downloads list.
6. The records may transfer directly to EndNote or you may have to select a Library in which to place the records.
7. In EndNote, results will be displayed as **Imported References**. Click **All References** to view the full Library again.

**Direct Export from JSTOR**

1. Select records by clicking in the checkboxes beside each record in the database search results list.
2. Click **Export Citation** at the top of the results list.
3. Click **RIS file** (EndNote, ProCite, Reference Manager).
4. Click **Open**.
5. If the file does not open automatically you can open it from your downloads list.
6. The records may transfer directly to EndNote or you may have to select a Library in which to place the records.
7. In EndNote, results will be displayed as **Imported References**. Click **All References** to view the full Library again.
Direct Export from Ovid Databases

OvidSP databases include Books@OVID, Journals@OVID, Mantis, MEDLINE, PsycEXTRA and PsycINFO.

1. Select records by clicking in the checkboxes beside each record in the database search results list.
2. Click the Export link at the top or bottom of the results list, the Export citation list window will open.

3. Select EndNote from the ‘Export to’ drop down list.
4. Click Export citations.

5. If the file does not open automatically you can open it from your downloads list.
6. The records may transfer directly to EndNote or you may have to select a Library in which to place the records.
7. In EndNote, results will be displayed as Imported References. Click All References to view the full Library again.
Direct Export from ProQuest

Databases include Biological Science, ERIC, GeoRef, IBSS International Bibliography of the Social Sciences, Linguistics & Language Behavior Abstracts, Sociological Abstracts, Worldwide Political Science Abstracts, ProQuest Dissertations and Theses and ProQuest ANZ Newsstand.

1. Select records by clicking in the checkboxes beside each record in the database search results list.
2. Select Export/Save.

3. Select EndNote, Citavi, or Reference Manager, the Export/Save window will open.

Note: The web browser Pop-up Blocker must be turned off
4. Click Continue.
5. If the file does not open automatically you can open it from your downloads list.
6. The records may transfer directly to EndNote or you may be asked to select a Library in which to place the records, then Click Open.
7. In EndNote, results will be displayed as Imported References. Click All References to view the full Library again.
Direct Export from ScienceDirect

1. Select records by clicking in the checkboxes beside each record in the results list.
2. Click the Export button at the top of the list of search results.
3. For Export File select RIS format (for Reference Manager, ProCite, EndNote).
4. Click the Export button.

5. If the file does not open automatically you can open it from your downloads list.
6. The records may transfer directly to EndNote or you may have to select a Library in which to place the records.
7. In EndNote, results will be displayed as Imported References, temporarily overlapping the existing EndNote Library. Click All References to view the full Library again.
Direct Export from Scopus

1. Select the records you want to export by clicking in the checkboxes on the left of each citation in the results list.
2. Click Export at the top of the results lists.
3. Select RIS format (Reference Manager, Procite, EndNote) for file format.
4. Choose the information you want to export eg. Citation information only.
5. Click Export.

6. If the file does not open automatically you can open it from your downloads list.
7. The records may transfer directly to EndNote or you may be asked to select a Library in which to place the records.
8. In EndNote, results will be displayed as Imported References, temporarily overlapping the existing EndNote Library. Click All References (top of the blue bar on the left) to view the full Library again.
Direct export from Web of Science (Web of Knowledge databases)
1. Select the records you want to export by clicking in the checkboxes to the left of each citation in the results list.
2. Click **Save to EndNote Desktop** (at the top of the results list).
3. Select which content you want to export and click **Send**.
4. If the file does not open automatically you can open it from your downloads list.
5. The records may transfer directly to EndNote or you may be asked to select a Library in which to place the records.
6. In EndNote, results will be displayed as **Imported References**, temporarily overlapping the existing EndNote Library. Click **All References** (top of the blue bar on the left) to view the full Library again.

Direct Export from Sage journals online
1. Select the records you want to export by ticking the boxes next to **Check item**.
2. Click **Add citations** button (on the right) the number of selected items will appear in brackets.
3. Click **Save/Print/Email/Download**.
4. Click on **Download to Citation Manager**.
5. Select EndNote from the **Citation Manager Formats** list.
6. If the file does not open automatically you can open it from your downloads list.
7. The records may transfer directly to EndNote or you may be asked to select a Library in which to place the records.
Direct Export from Google Scholar
If you access Google Scholar from MultiSearch the preferences for Google Scholar will already have been set. If you access Google Scholar directly you can then set up the preferences as follows:

1. From the Google Scholar page http://scholar.google.com click on Settings

2. Scroll to Bibliography Manager and click Show links to import citations into.
3. From the drop down menu select EndNote.
4. Click Save.

Now when you do a search each record will have a link to Import into EndNote.

5. To save a record to EndNote, click Import into EndNote at the bottom of each record. You need to do this for each record.
6. Open the file from your Downloads list, if it does not open automatically.
7. The record may transfer directly into EndNote, or you may be asked to select a Reference Library in which to place them. In this case, select the required Library.
8. Click Open.
Importing References into EndNote

Some databases do not allow direct export of results into EndNote. Importing records into EndNote from databases that don’t have direct export is a two-step process. You must first save your search results as text files (with the file extension .txt) and then import these files into EndNote. You can use this method with the following databases:

- Factiva
- PubMed Central
- AIO Anthropological Index Online
- Bibliography of Asian Studies

When importing your citations into your Library, EndNote Import Filters converts your list of saved references and filters them into the field structure of the EndNote reference templates.

Importing of search results is also useful when EndNote is not installed on the computer you are using. You can save the results and then import the references into your EndNote library. This method can also be used when a database filter is not available in EndNote but the results are less reliable.

Selecting the right Import Filter

Import Filters are unique to individual databases and library catalogues. A filter is selected to match two critical elements:

1. The “Name” matches the name of the database originally searched (e.g. Factiva)
2. The “Information provider” (vendor/supplier) is the one through which Macquarie University Library purchases the product (e.g. Dow Jones).

Some databases may be listed several times in the EndNote Filter list. To display the list of database filters in EndNote select the menu Edit | Import Filters | Open Filter Manager. You can pre-select the filters you will regularly use from the Filter Manager. It is important to choose the correct filter.

In this example Macquarie University Library subscribes to Factiva from Dow Jones (Thomson Reuters), the vendor of the product. The vendor of the database is usually displayed at the top of the database search page. Check with Library staff if you are unsure about the details of the database you are using.
Saving citations as text files

The method of saving files may differ depending on the database and the browser you are using but the process involves some basic steps. We recommend that you use Internet Explorer or Firefox to save files in this way.

For example to save files from Factiva using Internet Explorer:

1. Perform your search in Factiva
2. Select records by clicking the checkboxes to the left of the records.
3. Change Display options (on the right) to Full Article/Report plus Indexing.
4. Click the Save option (disk icon).
5. Select Article Format from the drop down box. A plain text version of the selected articles will open.

6. Click File | Save As.
7. Select Text File (*.txt) from the Save as type list and save the file to the desktop.

8. If this process does not work and you are using Internet Explorer 9 check the following settings:
   a. Click tools and then Compatibility View Settings
   b. Type factiva.com and click Close
For example, to save files from PubMed Central using Internet Explorer:

1. Perform your search in the database.
2. Select records by clicking the checkboxes to the left of the records.
3. Click Send to.
4. Select File under Choose Destination.

5. Select MEDLINE for Format.
6. Click Create File.
7. Save the file to the Desktop as a text file (.txt).

There is more information about saving results on the Macquarie University EndNote filters page:

Vendor filters: http://libguides.mq.edu.au/EndNotevendorfilters

Other database filters: http://libguides.mq.edu.au/EndNotedatabasefilters

You can also use the database Help screens if you are unsure about the process required to save your references to a file.
Importing References
Once you have selected and saved your references as text (.txt) files:

1. Open your Library in EndNote.
2. Select the menu File | Import | File.
3. Click the Choose File button.
4. Locate the drive (e.g. Desktop) where you saved the reference (.txt) file. Select the reference file name and click the Open button (your file name will now show in the Import File field).
5. In the Import Option drop down list select the Import Filter you require. If the required filter is not listed, select Other Filters from the list. This will open the Filter Manager dialog box from where you can select the Import Filter to match the database you were searching.
6. Select an option from the Duplicates drop down list:
   - Import All: Imports all references, including duplicates.
   - Discard Duplicates: Imports all references except duplicates.
   - Import into Duplicates Library: Duplicate references are imported into a library called File-Dupl.enl, where “File” is the name of the library into which you are importing. You can double check these are true duplicates before discarding.
7. Click the Import button. The citations will now appear in your EndNote library.

Note: You can delete the .txt file from the Desktop (or wherever they were saved) once you have imported the references into your library. Doing this will save space on your computer!

It is important to check the quality of the data that is transferred, as not all filters offer perfect results. There will be times when you may need to move the imported data around into the correct fields.

Remember, if you are unsure about which filter to use for the database you are using, check with Library staff.

If No Filter is Available in EndNote

If no filter is available in EndNote there are a number of support sites that may provide you with access to an Import Filter that you can download into your EndNote program.

- Check the Macquarie University EndNote filters page
  - Vendor databases http://libguides.mq.edu.au/EndNotevendorfilters
There is a list of filters available for download on the EndNote web site [http://EndNote.com/downloads/filters](http://EndNote.com/downloads/filters).

A number of universities also make specific filters available. Search for the database name and EndNote filter on Google or other search engines.

Where no filter is available, or the database does not support EndNote, manual entry or cut and paste are the only options!

**Search a database or catalogue from within EndNote**

It is possible to search some databases directly from within EndNote.

1. You must be connected to the internet and have an EndNote Library open.
2. Available databases appear in the Groups panel of EndNote under **Online Search**.
3. Click the required database and when the connection is made, a search box appears below the EndNote Library.
4. Enter keywords and click **Search**.

5. EndNote sends the search request off to the remote database and the summary of the search results is displayed in the **Confirm Online Search** dialog box.

6. Click **OK** to import these results into EndNote.
7. This method gives you limited access to the functionality of the database. For example you cannot limit documents to full text, or peer reviewed items.
Refining your search

If you have received a large number of results you can refine your search in the following way:

1. Click the Cancel button in the Confirm Online Search box.
2. Return to the Search box and add extra keywords or parameters as required.

When these records are displayed you can also refine the search by:

4. Click the drop down menu beside Contains to select other options. For example:
   a. (Year) is less than
   b. (Year) is greater than or equal to
   c. (Year) is greater than
5. Click a + box with to add further search boxes.
6. Click Search and the refined results will overlay the EndNote Library. These records will automatically be added to the EndNote Library that is opened.

Saving Citations to other Libraries

1. Select the citations you want to download to your EndNote library. To select non-consecutive citations, hold down the CTRL key and click, to select consecutive citations, hold down the SHIFT key and click.
2. To create a new library for the references, right click on the highlighted references, select Copy References To | New Library. Type in a File name for the library in the File name field and click the Save.
3. To save the references to an existing library, select the menu Copy References To | Choose Library, navigate to the libraries location, select the File name then click the Open button.
4. Once the library is opened, the references will import into that location. Right click on the highlighted references in the original library and select Move References to the Trash.

Convert Search to Smart group

Smart groups can be created by selecting search terms and criteria. They are dynamically updated as you add references to, and edit references in, the library. To convert search results into a Smart group click the Options button and select Convert to Smart Group. The search results will appear as a Converted Search group on the left bar. There is more information about Smart groups and other groups in the Editing, Searching and Organising Your References section of this guide.
Attaching PDFs to your references

There are three different ways that you can attach PDFs to references in your EndNote library:

1. Using the Import function.
2. Conducting a Find Full Text search.
3. Using the File Attachment function.

This section includes instructions for importing PDF documents and conducting a find full text search. For more information about attaching files including PDF documents see Appendix 3: The Reference Template.

Importing PDF documents into EndNote

It is possible to save PDF documents from a database as a temporary file (Desktop) and then import them into EndNote. A reference record will be created for the document, the record fields will be populated at the same time that the PDF is imported into EndNote.

This approach can only be used when the database displays the article “DOI” (Digital Object Identifier), in the text of the PDF document. It will not work when using databases like Academic Search Premier because the DOI is displayed in the article record but not in the PDF.

To simultaneously save the PDF and citation record to EndNote:

1. Create a new Folder on your computers Desktop.
2. Conduct your database search and save the PDFs you require into the Folder on your desktop. A number of PDF's can be added to the folder.
3. In EndNote select the menu File | Import | Folder.
4. Click Choose and locate the Folder on the Desktop.
5. Click OK.
6. Click Import.
7. If the records have transferred successfully, both the PDF and the record fields will filled.
8. Check each record carefully, to ensure the data has filled the correct fields and that the PDF is in the Attachment field.

Note: It is possible to save PDF files in a folder within the DATA folder attached to your EndNote library. See Appendix 2 EndNote Preferences for information about setting your preferences for how PDF files are stored with your EndNote Library.
Find Full Text

The Find Full Text command can search for full text documents for up to 250 records at a time. Before you use this function you must input the OpenURL path and Authentication URL in the Find full text preferences.

1. Select the menu **Edit | Preferences | Find Full Text.**
2. Make sure the boxes next to the search options are ticked.
5. Click **Apply** or **OK**.

The Find Full Text command is only available in the Integrated Library & Online Search Mode or the Local Library Mode. It is not available in the Online Search Mode. It is recommended that you only search for fifty references at a time.

1. Highlight up to 50 references.
2. Select the menu **References | Find Full Text | Find Full Text.** A copyright and usage window will open.
3. Click **OK** to confirm that you are aware of Macquarie University’s copyright and usage guidelines. See Appendix 7: Ethical & Legal Issues for more information.

4. Wait patiently while the magic happens, the time this process takes varies depending on your internet connection and the number of items you have selected.

5. Once EndNote has finished searching a paper clip icon will appear beside those items for which a PDF was found.
EDITING, SEARCHING & ORGANISING YOUR REFERENCES
The EndNote Library Window

Once you have some references in your library you can edit, search and sort your references. You can click on references in the Reference List panel and preview, edit and add attachments to references using the functions available in the Tabs Panel.

Editing a Reference

You can edit references by using the Reference Template window or the Reference Tab in the Tabs Panel.

1. Double click the reference to be edited or highlight the reference and select the menu References | Edit References. This will reopen the Reference template.
2. Edit the reference by placing the insertion point in the appropriate field and deleting or adding the information required.
3. To save the information select the menu File | Save or click the brown X in the top right corner of the Reference template.

OR

1. Highlight the reference and select the Reference Tab. The Reference template will be displayed in the Tabs Panel.
2. Edit the reference by placing the insertion point in the appropriate field and deleting or adding the information required.
3. To save the information select the menu File | Save.
Preview Tab

The **Preview Tab** in the Tabs Panel displays the citation according to the output style selected.

1. Click on a reference in the **Reference List Panel** to highlight it.

2. Click on the **Preview Tab** and the citation will be displayed in the Tabs Panel according to the style selected in the **Output Citation** box on the toolbar.

![Preview Tab Image](image)

**Note:** For instructions about how to customise the appearance of Output Styles, or to modify the way references will appear in in-text citations, footnotes and bibliographies see *Appendix 2: EndNote Preferences.*
Searching for a Reference within a Library

1. To display the search panel in EndNote select the menu **Tools | Search Library**, press the shortcut key **CTRL+F**, or click **Show Search Panel** on the toolbar.

2. Type your search term/s in the search box/es, e.g. 2013 and sustainability

3. Other search options can be selected from the drop down lists on the search boxes. These include specific fields like Author, or limiting by date range. For example ‘Year’ ‘Is greater than or equal to 2010’, would produce all references after 2010.

4. Click the **Search** button. All of the references in your library that match the search criteria will be listed.

5. To switch back to the complete list of references click on **All References** on the Groups panel and click on **Hide Search Panel**.

**Important Note**: When you perform certain functions in EndNote, such as searching, the references that do not match the search query are hidden.

To redisplay your entire EndNote library click **All References** in the Groups panel or use the shortcut key **CTRL+M**. If ‘**Hide Search Panel**’ does not show in the top right of the Search panel click on the Toolbar options >> symbol.
Sorting references

EndNote libraries are set up to sort by the first author’s last name, year, and record number by default. When you add a new reference, or modify an existing reference, EndNote automatically files it in the default sort order. You can change the sort order at any time, and EndNote will remember the current sort order until you change it.

To change the sort order of your references:

1. Select the menu Tools | Sort Library.
2. Select one or more field names from the drop down lists in the Sort Options dialog box in the order you want them sorted. You do not have to use all five Field lists.
3. Click the button to the right of each field to indicate ascending or descending order.
4. With the field names in the order desired, click OK.

Creating Groups of References

EndNote X7 allows you to organise references into Groups which can then be organised into Group Sets. Groups are displayed in the blue panel on the left. How they display will depend on the search mode selected (this can be changed using the book and world icons under the File menu). The Integrated Library & Online Search Mode will display all groups and a record count for each.

If you don’t wish to display the Groups panel, select Groups (on the toolbar), click Hide Groups or Show groups. The different group types are:

- **Permanent groups** are automatically created by EndNote and can’t be removed. This includes All References, Unfiled, Trash.
- **Temporary groups** include Copied References, Duplicate References, Imported References, Search Results and several Full Text groups.
- **Custom groups** are manually created by the user to organise the library. For example create Chapter groups, or subject area groups e.g. Nano group. These groups have a folder icon.
- **Smart groups** use search keywords to dynamically update groups as existing references are edited or new references are added to the library.
- **Combination groups** Use AND, OR, and NOT to combine groups into smart groups.
Note:
- Each Library can contain 5,000 custom and smart groups combined.
- A reference can be added to more than one Group.
- If a reference is deleted from a custom group it is not deleted from the library.
- If a reference is deleted from the library, it will be deleted from all groups.

Creating a Custom Group
To create a new custom Group:
1. Select the menu Groups | Create Group
2. The new group appears in the left pane.
3. Click in the New Group box and type the name of the new group e.g. Parrots.
4. To delete a group, click right on a group name and select Delete Group

Adding a reference to a Custom Group
EndNote X7 provides two ways of adding references to Custom Groups.
- You can drag-and-drop to copy individual references into a custom group

OR
- Highlight required references (Shift & highlight allows selection of multiple references). Click Groups (top toolbar) and Add References To.

Creating a Smart Group
To create a new Smart Group:
1. Select the menu Groups | Create Smart Group, the Smart Group Window will open.
2. Click in the Smart Group Name box and type the name of the new group.
3. Choose the fields you want to search across from the dropdown lists.
4. Select the search terms and criteria for the references you want included in the group.
5. Click Create.
Creating a Combination Group

To create a new custom Group:

1. Select the menu **Groups | Create From Groups**, the Create From Groups window will open.
2. Click in the Group Name box and type the name of the new group.
3. Use the drop down lists to select the groups you want combined.
4. Choose how you would like to combine the groups by selecting And, Or, or Not.
5. Click Create.
USING ENDO NOTE WITH WORD

The Cite While You Write (CWYW) function allows you to cite references and create bibliographies in your word-processed document in the bibliographic style you require (in EndNote bibliographic style is referred to as Output Style). It is a good idea to pre-set your Output Style before commencing work in Word.

Setting up CWYW in Word

When EndNote is installed on your computer it is added as a tab to the Word toolbar.

You must use the functions provided by EndNote to insert the required references from your EndNote library into the text of your document.

Note: If EndNote is not added to the toolbar in Word when the EndNote program is installed you need to check if the Add-In has been enabled:

1. Select the menu File | Options | Add-Ins.
2. Select Manage : Disabled Items click Go.
3. Select the check box next to CWYW to enable it. Shut down Word and Reopen Word and EndNote.
4. If there are still problems follow the instructions at http://EndNote.com/support/faqs/EndNote.
Adding an EndNote citation to your Word document

To start adding citations to a document, open Word and your EndNote library. From in Word, click EndNote on the toolbar. You can use the shortcut keys Alt+1 to switch between the two programs or use the EndNote icon on the Word toolbar. Select the citation style you wish to use in Word, (the default is the style already selected in EndNote).

Footnote style

To use a style with footnotes

1. In Word click the EndNote X7 tab on the tool bar and select the required citation style.
2. Place the cursor in the text where you wish the footnote number to appear.
3. Select the menu References | Insert Footnote (not the EndNote tab).
4. A footnote number appears in the text and then the cursor and footnote number move to the bottom of the page.
5. Click on the EndNote X7 tab and click Insert Citation | Find Citation, type the letter a to select the whole library.
6. Highlight the required citation/reference.
7. Click Insert and the citation will be added to the footnote.
In-text Citation styles

1. In Word, click the EndNote X7 tab on the tool bar and select the required citation style.
2. Place the cursor in the text where you wish to insert the Author-Date citation.
3. Click on the EndNote tab in Word and select the menu Insert Citation | Find Citation, click the letter a to select the whole library.
4. Highlight the required citation/reference.
5. Click Insert.

The citation will be inserted in the text of your Word document and will also be added to the bibliography at the end of the document (depending on whether the selected style has a bibliography). The bibliography will move down the page as more text is inserted.
Editing Citations in Word

Manual editing of citations inserted in a Word document using EndNote will not work so it is essential that you use the Edit Citation(s) function available from the EndNote tab in Word. Edit options include:

- remove citations
- omit or add the author and year fields
- add prefixes, suffixes, page or pinpoint numbers. Spaces between the prefix or suffix and the citation, must be inserted at this time.

To edit a citation

1. In Word highlight the citation section in brackets and click Edit & Manage Citation(s) on the toolbar.

OR

Right-click on the citation you wish to edit and select the menu Edit Citation(s) | More.

2. If multiple citations are listed in the Edit & Manage Citations window, select the appropriate one from the list.

3. If you wish to add page numbers, enter these in the Suffix field. For example leave a space and then type p.3 (see over).

Note: Do not use the Pages field because it requires additional configuring.
4. You can also **Exclude author** or **Exclude year**. These are useful when in-text citation styles are used.

Examples where you might use this include:

   a. Smith’s theory (Smith, 2008) - Normal in text citation
   b. Smith’s theory (2008) - Exclude author
   c. The 2008 theory (Smith) – Exclude year

5. The theory (Smith, 2008 p.4) Enter p.4 in the suffix field. Leave a space before the p. or omit the p. (depending on the style required).

6. You can also use this menu to **Remove Citation**

---

**Repeat Citations when Referencing**

**Repeat Citation in a following reference**

a) When you cite a work that has been cited in the immediately preceding reference, EndNote may add **Ibid** (meaning the reference cited immediately above) depending on the citation style selected.

**Repeat Citation in a later (but not immediately following) reference**

a) When citing a source that has already been cited, EndNote may insert **op.cit** (meaning already cited) depending on the citation style selected.

b) You can cite a source that has been previously cited in a footnote using Word’s **cross-reference** function.

   1. Click where you want the reference located.
   2. Select the menu **Insert | Cross-Reference**.
3. In the Reference type box, select Footnote.
4. In the Insert reference to box, select Footnote number.
5. In the For which EndNote, click the note to which you want to refer.
6. Click Insert, and then click Close.

![Cross-reference dialog box showing Reference type and Insert reference to options]

**Formatting the Bibliography**

To format your paper in a bibliographic style different to the one currently selected (e.g. from APA 6th to Harvard) or to refresh the bibliography to the current style:

1. In Word, select the EndNote tab on the toolbar and click the arrow on the right in the Bibliography section, or press the shortcut keys Alt+3.

![EndNote X7 Bibliography configuration dialog box showing With output style dropdown]

2. Select another bibliographic style from the With output style drop down list.
3. Click the OK button.

![EndNote X7 Bibliography configuration dialog box showing the format for bibliography settings]

This function also allows you to change the layout of the bibliography including a title, font size, spacing and indents.
Removing Field Codes to Share Documents

EndNote uses field codes to link the Word document to EndNote references. You may need to remove the field codes in order to share a document with others (such as a publisher or colleague), since these field codes may be incompatible with the publishing software or software being used by your colleague.

The Remove Field Codes command first makes a copy of your document with field codes removed, whilst retaining your original version with field codes. Make sure you save a master copy of this file while you work on a copy that has the field codes removed.

To remove field codes

1. Open your document in Word.
2. Select the menu EndNote X7 | Convert Citations and Bibliography | Convert to Plain text. A new unsaved copy of your document, without any EndNote field codes, will be created.
3. Save the document under a new File name.
PRINTING FROM ENDNOTE

Create and print an independent bibliography

The references in an independent bibliography will be sorted in the order in which they appear in the main library window in EndNote. There are three ways that you can print a bibliography.

Option 1

1. In EndNote select the menu **Tools | Sort Library** to sort the library list to your requirements e.g. select **Author** and **A-Z**. Click **OK**.
2. Select the pull down menu from the **Output Styles** box and select the required Style.
3. Select the menu **File | Print Preview** and if satisfactory click **Print**.

Option 2

Follow the first 2 steps above then:

1. Select the menu **File | Export** and save the bibliography to your preferred location, in Rich Text Format (.rtf) file type.
2. It is now ready for printing or transfer via email etc.

Option 3

1. Select the required references.
2. In EndNote, select the menu **Edit | Output Styles**. Select the **Output Style** required from the list.
3. Select the menu **Edit | Copy Formatted** to copy the references.
4. Open a document in Word and **Paste** the references by right clicking the mouse and selecting one of the Paste Options or use the shortcut **Ctrl+V**.
5. Save the document. It is now ready for printing or transfer via email etc.

This file type will retain the style formatting and create a document that can be opened and edited in most word processors. Use this option if you would like to be able to customise headers, footers, heading titles, etc. in your bibliography before printing.

Printing individual references

To print references directly from EndNote:

1. In your EndNote library, highlight the reference/s required.
2. Select the required Output Style from the Current Style drop down list on the Main toolbar (e.g. **APA 6th**).
3. Select the menu **File | Print**.
4. Click the **Print** button
FURTHER HELP

There is a range of ways that you can get help using EndNote.

EndNote Guide

The EndNote guide is loaded along with the program. To access this:

- In My Computer open Program Files | EndNote X7 | EndNoteX7WinHelp.pdf

EndNote Web Site

http://www.EndNote.com/

The Support and Services section includes:

- Access to the latest EndNote styles, filters and connection files.
- Search the Technical support database or email for advice or help with a particular problem. Responses are usually within 24 hours.
- Tip sheets are a quick resource highlighting key functions of the program.
- Links to libraries, internationally, who use and support EndNote within their organisation. Some links may provide customised Filters, Styles, and Connection Files.

Email EndNote Technical Support

http://www.EndNote.com/support/entechform.asp

This page includes FAQs and email address.

The EndNote Community Forum List

http://community.thomsonreuters.com/ts/?category.id=EndNote

The discussion list allows interaction, with other users of EndNote. It is a great place to ask those tricky questions, make suggestions, and get advice on any EndNote related topic. You need to register to send posts but not to read them.
Macquarie University Library Bibliographic Referencing Software guide

http://libguides.mq.edu.au/referencing-software

Find information about:

- Obtaining the EndNote program and links to online training programs
- Conditions of use (Macquarie University Licence)
- Download instructions and filter information for key Macquarie University Library databases.

The EndNote filters page, http://libguides.mq.edu.au/EndNotevendorfilters, also includes information about saving, importing and exporting to EndNote.

Search the Web

Many universities and research organisations have EndNote websites offering training notes and customised filters and connection files. When you use a search engine make sure the database name is correct and use quotation marks e.g. “Middle Eastern & Central Asian Studies” and “EndNote filter”.

Need More Help?

Honours, postgraduate students and staff of Macquarie University can obtain assistance on identifying and using databases by contacting the Liaison Librarian for their Department. They can also assist with EndNote queries. Contact details are available at:


For further information or advice you can also contact:

- Phone: 1800 300 753
- Email: http://www.mq.edu.au/on_campus/library/forms/ask_a_librarian_email_enquiry/
# APPENDIX 1: CITATIONS

Understanding a Citation

**Book**

<table>
<thead>
<tr>
<th>Author's name</th>
<th>Title of book</th>
<th>Publication details</th>
<th>Date</th>
</tr>
</thead>
</table>

**Book Chapter**

<table>
<thead>
<tr>
<th>Chapter's author</th>
<th>Chapter title</th>
<th>Book title</th>
</tr>
</thead>
</table>

**Article**

<table>
<thead>
<tr>
<th>Article's author</th>
<th>Title of Article</th>
<th>Journal title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monaghan, A.</td>
<td>Antarctica and climate change.</td>
<td><em>World Watch</em> 22, (1) Jan/Feb 2009, p.6-12</td>
</tr>
</tbody>
</table>
APPENDIX 2: ENDNOTE PREFERENCES

There are a number of areas in which you can customise the look and setup of your EndNote libraries. Most of these are documented in the EndNote manual in the section, Preferences, Toolbars and Shortcuts. Some of the key settings include:

To access EndNote preferences

1. Select the menu Edit | Preferences.

2. There is a list of Preferences in the list on the left side of the Preferences dialog box. To look at the settings click on the name of the required Preference, e.g. Reference Types.

Setting Default Libraries

This sets which libraries will open by default each time the EndNote program is opened. To add a library (it is possible to have more than one default library open):

1. Open the libraries you want to set as default libraries.
2. Select the menu Edit | Preferences and select Libraries from the Preferences list.
3. Click the Add Open Libraries button to add all currently open libraries to the default list.
4. Click the OK button to close the Preferences dialog box.

Reference Types

The Reference Types preference settings allow you to customise settings such as:

- Default Reference Type (e.g. Journal Article, Book, Newspaper Article).
- Fields settings (e.g. Author, Year, Title).
- Unique Reference Types (e.g. Musical Score).
**Default Reference Type**

EndNote defaults to displaying the **Journal Article** Reference Type when adding citations on the **New Reference** template. To change this:

1. Select the menu **Edit | Preferences**.
2. Select **Reference Types** in the **Preferences** list.
3. Select your preferred option (e.g. **Book Section**) from the Default Reference Type drop down list. This will become the default when the New Reference template is opened.
4. Click the **OK** button to close the Preferences dialog box.

![EndNote Preferences dialog box](image)

**Modifying or Creating Reference Types**

EndNote comes with a number of **Reference Types** pre-set (Journal Article, Book Section etc.) however there may be a need to modify or create Reference Types to suit specific requirements. To modify or create a **Reference Type**:

1. Select the menu **Edit | Preferences**.
2. Select **Reference Types** from the **Preferences** list.
3. Click the **Modify Reference Types** button.
4. Each column displayed, represents a different type of reference. The first column is the **Generic Reference Type** listing all the available fields. Use this as a guide when creating/amending Reference Types.

5. All Reference Types, (except the Generic list in the left column), can be modified using this table. At the **Default Reference Type** pull down menu, select **Unused1**. to create a new reference type eg. Music score

**Renaming the Title Field**

To rename the title field, click on the author field, in the right column, and then use the up arrow to move to the generic field. Type a new name for this field to replace the current one (Unused1).

**Adding a New Field**

1. To add a new field to a **Reference Type**, look at the field names in the Generic column and find one that is most similar in meaning. In the Reference Type that you are modifying, make sure that this field is blank. If it is not, choose another blank field.
2. Click in the blank cell and type a new name for the field.
3. Remember to match them as closely as possible to the Generic template. Eg. For a reference type Musical score, use Composer instead of Author.

Deleting a Field

To customise your Reference Types you may find it useful to delete fields that you will never require. This helps to enhance your data input by providing you only with those fields in your templates that are relevant to your needs.

1. From the Reference Type columns, locate the field you no longer require.
2. Select the text within the field and click Delete on your keyboard.
3. Alternatively use the Backspace key to delete the text.

Note: You can always add this field in again if you find that you require it.

Saving Changes

After amendments and additions have been made to any of the Reference Type templates, it is important that you save this information:

1. Click the OK button after you have changed or added any new information. This will return you to the Preferences dialog box.
2. Click the OK button to save all changes.

Customise the Output Style to include the New Reference Type

In EndNote:

1. Click Edit | Output Style
2. Select Edit Harvard (or whatever style you are using)
3. Under Bibliography, select Templates
4. Click Reference Types (this inserts the name of the reference type)
5. Place the cursor below the reference type heading
6. Click Insert Field and select the field names from the list (they include the names you added to the Generic Reference Type box.
7. Copy the style of the document types above e.g. add a space between the field names, add brackets around the year, if required etc.
Storing files with the Library

You can save PDF files in a folder within the DATA folder attached to your EndNote library. Enable this option by clicking on Edit | Preferences | URLs & Links. The box labelled **Copy new file attachments to the default file attachment folder and create a relative link** needs to be ticked.

Using this option, EndNote will copy the file from its existing location on your computer and store it in a folder attached to the Library.
APPENDIX 3: THE REFERENCE TEMPLATE

Some fields have rules for how information should be entered.

Author and Editor Names

- Author and editor names must be entered with one name per line. If an author's name is too long to fit on a single line, just let it wrap to the next line as you type it.
- Author names should be entered with the last name followed by a comma and the first name. e.g.
  - Smith, Brian
  - Brian Smith
- EndNote can abbreviate first and middle names, so for maximum flexibility enter whole names whenever possible.
- If you are entering initials instead of full names, type a space between initials, e.g. J O Fisher, otherwise EndNote interprets the initials as a single name “Jo”.

Corporate Authors

- When entering corporate authors, put a comma after the name. e.g.
  - BHP Billiton,
  - Victorian Law Reform Commission,
- Do not use commas in the corporate name because all text before a comma is interpreted as a last name.

Using “et al.” or Similar Abbreviations

- Enter all author names for a particular reference. EndNote will truncate the list of authors with “et al.” or “and others” as required by the bibliographic style.

Anonymous Works

- If a reference has no author, you should leave the Author field blank. Do not enter “Anonymous.” The style that you use to format the bibliography determines how anonymous references are treated.

Complex Author Names

- For multiple-word last names, like Charles de Gaulle, enter the name with the last name first, such as:
  - e.g. de Gaulle, Charles
  - e.g. Van Gogh, Vincent
  Entering a name this way ensures that both words de Gaulle and Van Gogh will format as the last name.
- Enter authors with titles, such as “Jr” as Last, First, Title.
  - e.g. Alfred Smith Jr. is entered as Smith, Alfred, Jr

Diacritics
• Copy and paste symbols or Unicode characters from Word. In Word click **Insert | Symbol | More Symbols**. Click the required symbol to insert it into a Word document. e.g. Gmůr, Leonhard. Then copy and paste the character into the required position in the EndNote reference.

**Titles (includes Title, Secondary Title, Tertiary Title, Alternate Title)**

• Enter title without a period at the end.
• Capitalize the title in the same way that it needs to be capitalized in the bibliography.
• Do not enclose the title in quotation marks, the output style adds these.

**Pages**

• Page ranges can be entered as complete (1442-1449) or abbreviated (1442-9) ranges.
• Do not enter commas in the Pages field for page numbers in the thousands.

**Date**

• Enter dates as you would like them to appear in your references. EndNote does not reformat dates.

**Edition**

• The text of the Edition field is not modified by EndNote for your bibliographies, so enter 1\textsuperscript{st}, 2\textsuperscript{nd}, etc. for this field if required for your bibliography.
• To achieve the superscript, highlight the suffix, e.g. st, nd, then click the superscript button on the toolbar.

Check the EndNote Guide for more information on entering data.

**Additional Fields**

In addition to the core fields of Author, Title, Journal, Pages, etc. there are a number of fields in the template that can be utilised.

**Call Number:** Can be used to store library call numbers or your own classification system.

**Keywords:** Electronic databases and print indexes assign standardised keywords to each citation. However, you can also assign additional keywords to improve retrieval relevant to your research.

**Research Notes:** Use the Research Notes field to add your own information about the resource. For example a quote from the article, book etc. could be added, along with its page reference, to allow you to easily track it down again. You can also cut and paste text into this field. Capacity is about 16 pages.

**Notes:** The Notes field is commonly used by databases when exporting citations to EndNote. Data in exported citations that does not have a field location will go into the Notes field by default. **Do not use the Notes field for your personal annotations; always use the Research Notes field for these.**

**URL:** When a URL (web address) is entered in this field it becomes a dynamic link. Either copy and paste or type the web address into the field. Clicking on the address link will then open the web page in your web browser. If the link is to a journal article on a database, the link will only work on campus, due to remote access authentication.
**File Attachments**: The File Attachments field can store the path to files on your computer (such as word processing documents, and PDF files). Don’t use this field to attach a graphic or file that you want to insert into a Word document with the Cite While You Write add-in; always use the Figure field for these. Up to 46 separate files can be stored in this field. To create the link to a file location:

1. In EndNote double click the Reference to open it.
2. Place the cursor in the File Attachments field. Select the menu References | File Attachments | Attach File.
3. Locate the file you want to create a link to, from the dialog box.
4. Select the file name in the File name list and click the Open button. An icon representing the file will now appear in the File Attachments field.

To open the file from EndNote:

- Open the reference. Double click the icon in the File Attachments field in the reference template.

OR

- Select the reference then select the menu References | File Attachments | Open file.

To delete an attachment, double click on the Reference, scroll to File Attachments field and click to highlight the attachment icon. Click Edit | Clear.

**Figure**: This field can contain a graphic or file attachment that can be inserted into a Word document using the Cite While You Write function. Each reference can contain only one graphic or file attachment in the Figure field. A related Caption field appears directly under the Figure Field and can be used to add a short description of the image or file. See Appendix Four: Adding Images & Files for more information.
APPENDIX 4: ADDING IMAGES & FILES

EndNote allows you to embed graphics and object files (e.g.: Word document, PPT, Excel spreadsheet) in an EndNote library and link them to papers.

- You can insert graphics, figures or files into the **Figure** field of an EndNote reference.
- After inserting a graphic always add a **Caption** to the Caption field (usually the field below). This will label the graphic once the image has been inserted into the paper.
- EndNote recognises the following graphic file types:
  - .bmp; .gif; .jpeg; .png; .tiff
- EndNote recognises the following file formats:
  - Audio (.wav, .mp3); Multimedia (MOV, QuickTime)
  - PDF files; Technical drawing files
  - Text files (.txt, .rtf, .html)
  - Microsoft Word, PowerPoint, Excel, Project, Access, Visio

Note: When you insert an image EndNote creates a folder, specifically for images, in the same folder as your library. This folder has the same name as your library with a .DATA extension. When you add an image, EndNote copies the image file and places it in the DATA file. If you move or share your library you will need to copy the .DATA folder as well.

Inserting a Graphic

1. In EndNote, open a record and place the insertion point in the **Figure** field, then select the menu **References | File Attachments | Attach Figure**. Do not use **Copy | Paste** as system settings may affect the colours or lose certain attributes.

2. An **Attach figure** dialog box will open

![Select a file to link to the reference](image)

3. Locate the image file you want to attach, select the file, and click **Open**. The image will appear as a thumbnail picture in the **Figure** field. Each EndNote reference can
contain only one graphic or file attachment in the Figure field. If you insert a second graphic or file, it will replace the first one. The previous figure is deleted from the DATA folder.

4. Always type a title in the Caption field, which enables you to later insert the figure into a Word document. To add a caption, place the insertion point in the Caption field and type the details required. This allows you to search for the figure.
APPENDIX 5: IMPORTING BIBLIOGRAPHIC LISTS INTO ENDNOTE

It is possible to import reference files that have been saved as Word documents into EndNote. It is also possible to import Excel and database files. To do this, please refer to the EndNote manual.

Note: For smaller citation listings it might be quicker and easier to select the menu Edit | Copy in the source file and then select the menu Edit | Paste in EndNote, or to enter them manually (using the New reference function).

To import this type of file, the citation data needs to be ‘tagged’ in a format that EndNote is able to read. With the original document in plain text file (.txt) format, create the tagged document by preceding each field in a citation with an identifying EndNote tag:

<table>
<thead>
<tr>
<th>Tag</th>
<th>EndNote Generic Field Name</th>
<th>Tag</th>
<th>EndNote Generic Field Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>%A</td>
<td>Author</td>
<td>%M</td>
<td>Accession Number</td>
</tr>
<tr>
<td>%B</td>
<td>Secondary Title</td>
<td>%N</td>
<td>Number (Issue)</td>
</tr>
<tr>
<td></td>
<td>(of a Book or Conference Name)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>%C</td>
<td>Place Published</td>
<td>%P</td>
<td>Pages</td>
</tr>
<tr>
<td>%D</td>
<td>Year</td>
<td>%S</td>
<td>Tertiary Title</td>
</tr>
<tr>
<td>%E</td>
<td>Editor /Secondary Author</td>
<td>%T</td>
<td>Title</td>
</tr>
<tr>
<td>%F</td>
<td>Label</td>
<td>%U</td>
<td>URL</td>
</tr>
<tr>
<td>%I</td>
<td>Publisher</td>
<td>%V</td>
<td>Volume</td>
</tr>
<tr>
<td>%J</td>
<td>Journal Name</td>
<td>%X</td>
<td>Abstract</td>
</tr>
<tr>
<td>%K</td>
<td>Keywords</td>
<td>%Y</td>
<td>Tertiary Author / Translator</td>
</tr>
<tr>
<td>%L</td>
<td>Call Number</td>
<td>%Z</td>
<td>Notes</td>
</tr>
</tbody>
</table>

For example the following citations have citation type tags attached ready for importing:
A variation of this method involves tagging all citations with a single identifying Title tag: %T. This would then import the full citation into the Title field in an EndNote reference template, from which it is possible to select and move the data into the appropriate fields such as Author; publisher etc.

<table>
<thead>
<tr>
<th>%A</th>
<th>Geoffrey Chaucer</th>
<th>%A</th>
<th>Herbert H. Clark</th>
</tr>
</thead>
<tbody>
<tr>
<td>%D</td>
<td>1957</td>
<td>%D</td>
<td>1982</td>
</tr>
<tr>
<td>%T</td>
<td>The Works of Geoffrey Chaucer</td>
<td>%T</td>
<td>Hearers and Speech Acts</td>
</tr>
<tr>
<td>%E</td>
<td>F. N. Robinson</td>
<td>%B</td>
<td>Language</td>
</tr>
<tr>
<td>%I</td>
<td>Houghton</td>
<td>%V</td>
<td>58</td>
</tr>
<tr>
<td>%C</td>
<td>Boston</td>
<td>%P</td>
<td>332-373</td>
</tr>
<tr>
<td>%N</td>
<td>2nd</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Importing the file into EndNote**

The process for importing this file into EndNote is similar to importing files saved from database and catalogue searches.

1. In Word, create a text file from your references document by selecting the menu File | Save As and selecting Text File (.txt) from the Save as type drop down list. (Make sure that all citations are at least tagged with a %T symbol.)
2. Open your EndNote Library.
3. Select the menu File | Import.
4. Click the Choose File location button, locate and select the .txt file.
5. Select the Refer/BibIX format from the Import Option drop down list.
6. Click the Import button
7. Open a reference. If just the %T tag was used in the Text File (.txt) file, the information will be in the Title field and can now be moved to the correct fields.

8. Select the text then select the menu **Edit | Cut** or press the shortcut keys **CTRL+X**.

9. Place the insertion point in the correct field and select the menu **Edit | Paste** or press the shortcut keys **CTRL+V**.

10. Alternatively, select and move the information to the correct fields using the click and drag method.
APPENDIX 6: USING MANUSCRIPT TEMPLATES

EndNote comes with a number of predefined Microsoft Word manuscript templates based on the submission guidelines from some publishers. The templates provide formatted layouts including:

- Margins and line spacing
- Headings
- Pagination
- Title and abstract page
- Font type and size.

It is not essential to use these templates. They are provided as an optional support option for electronic submission.

- In EndNote, select the menu Tools | Manuscript Templates.

OR

- In Word, select the menu File | New and select New From Existing find the EndNote templates folder which is usually located at Program Files | EndNote x7 | Templates folder and select the required template.

1. Select the icon of the template named for the publisher to which you intend to submit your manuscript, e.g. ACS.dot. This opens a new document in Word that is based on the template file, and starts an EndNote X7 Manuscript Wizard.

2. Enter the information requested by the template Wizard, e.g. Title of paper, Author’s name, etc. In Step 4, Sections, you may de-select those sections you do not wish to include, however, the checked items are required by the publisher of the selected journal.

3. Click Finish to complete and display the new document. The Wizard places the information you have supplied in the appropriate places in the document. You can then add the content and references.

Note: The first time you launch the manuscript template Wizard, you may receive a notice about Macros. Accept macros to continue with the wizard.
For further information about using Templates, see the EndNote x7 Guide.
APPENDIX 7: ETHICAL & LEGAL ISSUES

Information Ethics

All students and staff should be aware of their ethical and legal responsibilities when using materials created by others. Further details about copyright can be found at:
http://www.mq.edu.au/on_campus/library/copyright_guidance/

Academic Honesty

Below is an extract from Macquarie University’s Policy on Plagiarism. Further details can be found at http://www.mq.edu.au/policy/docs/academic_honesty/policy.html

Examples of dishonest academic behaviours are:

Plagiarism: Using the work or ideas of another person and presenting this as your own without clear acknowledgement of the source of the work or ideas. This includes, but is not limited to, any of the following acts:
   a) copying out part(s) of any document or audio-visual material or computer code or website content without indicating their origins
   b) using or extracting another person’s concepts, experimental results, or conclusions
   c) summarising another person’s work
   d) submitting substantially the same final version of any material as another student in an assignment where there was collaborative preparatory work
   e) use of others (paid or otherwise) to conceive, research or write material submitted for assessment
   f) submitting the same or substantially the same piece of work for two different tasks (self-plagiarism).

Deception: includes, but is not limited to, false indication of group contribution, false indication of assignment submission, collusion, submission of a work previously submitted, creating a new article out of an existing article by rewriting/reusing it, using the same data to form the same arguments and conclusion, presenting collaborative work as one’s own without acknowledging others’ contributions, cheating in an examination or using others to write material for examination.

Fabrication: includes, but is not limited to, creating fictitious clinical data, citation(s), or referee reports.

Sabotage: includes, but is not limited to, theft of work, destruction of library materials.

IT Governance, Policies, Procedures and Forms

Information relating to the ethical and legal use of student/staff IT accounts and facilities is outlined in Macquarie University’s IT Policies and can be found at:
http://www.mq.edu.au/policy