

Swinburne University of Technology

EndNote X8 Basics For Mac

Swinburne Library EndNote resources page:

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

These notes include excerpts from the EndNote Manual and Help Screens. Copied with permission from Thomson Reuters.

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Getting Started

1. Find EndNote X8 in your Applications folder
2. Click the **EndNote Program**.
3. The first time you start EndNote X8, you will be presented with the Welcome to EndNote X8 slide show. Close it. Click the File menu.
4. Click New to create a new EndNote library, which is the data file for all of your bibliographic information.
5. EndNote presents a window prompting you to name and save the new library.
6. The new file appears as an empty EndNote library.

Adding references to your database

Most Swinburne databases require you sign in using your SIMS account – they cannot be searched via the Online Search mode. You can however search them from the Swinburne library webpage, and then export the search results to EndNote.

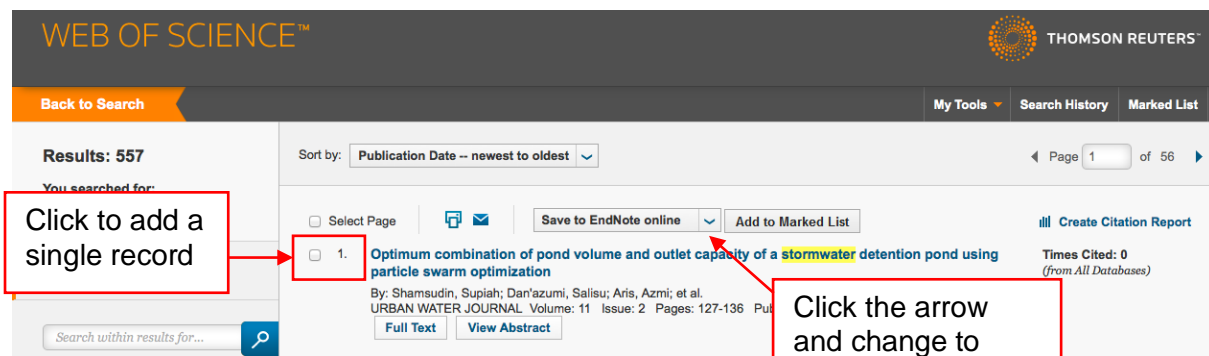
We recommend the Firefox Internet browser for browsing our databases and transferring records to EndNote X8. Firefox for Mac is available from <http://www.mozilla.org>

Exporting references from Bibliographic Databases: an exercise

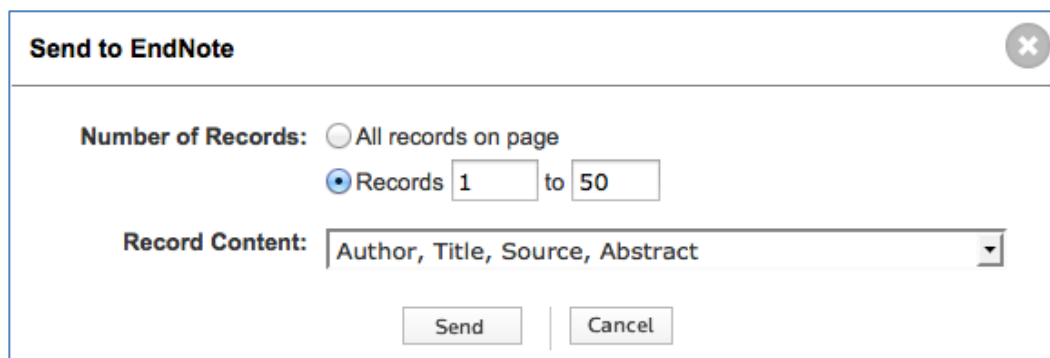
While this exercise uses Web of Knowledge, many of the databases available at Swinburne will transfer directly to EndNote. Typically they will have an option to “mark” or “add” records of interest, and then you can look at the marked items and find an export option. Ask your liaison librarian for advice regarding specific databases, and check the EndNote webpage on the Library site.

Web of Science is set up for direct imports, but you may need to do some editing after the import.

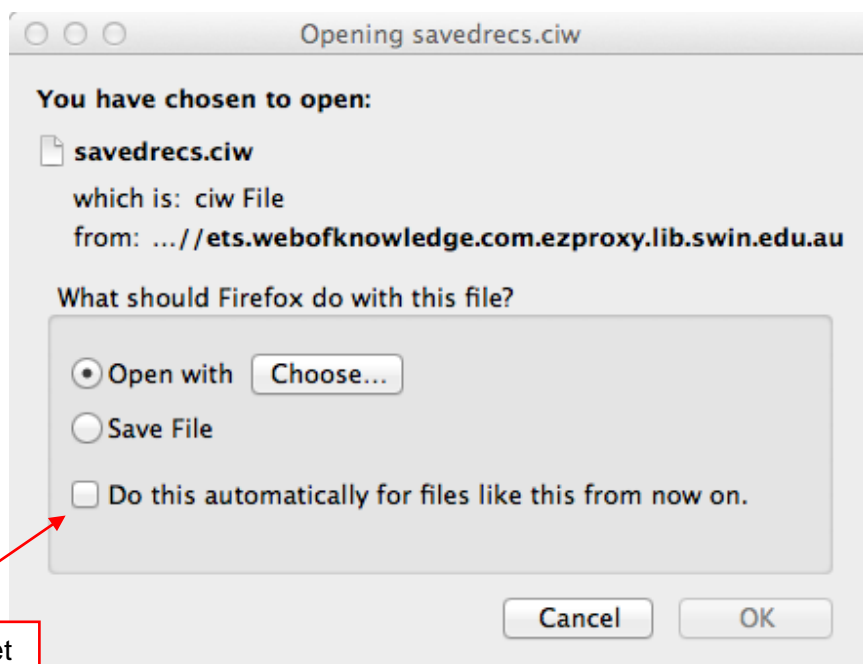
1. Make sure that you have EndNote X8 and your research library open.
2. Open the Firefox browser.
3. Go to the Library homepage: <http://www.swinburne.edu.au/library/>
4. Click the **Search** option under the **Library dropdown menu** at the top of the Screen.
5. A link for **Web of Science** appears under the Library search box. (You may need to scroll down.) Click the **Web of Science** link
6. Type the words: **rainfall and stormwater runoff** in the search window.
7. Click **Search**.
8. You will get a list of all relevant articles.
 - a. For one useful reference, you can click on the selection box. Then jump to step 9.
 - b. If you want to select a range of references, do not tick any of the selection boxes.



9. Click the arrow next to **Save to EndNote online**.
10. Click **Save To EndNote Desktop**.
11. If you have not ticked a selection box, you can now type in a range of references. Let's type in **1-50**
12. Change the record content option to include the abstract



13. Click **Send**.
14. You will see an ISI processing screen and the records may auto-transfer to your EndNote library.
15. If you are prompted to transfer the records using the Web Export Helper, you need to set the transfer behaviour for Firefox.



Tick this to set the transfer behaviour.

16. Click **Open with**
17. Click **Choose**.
18. Find and click the **EndNote X8 folder** in the **Applications** folder.
19. Click **EndNote X8**.
20. Click **Open**.
21. Tick "Do this automatically for files like this from now on."
22. Click **OK**.
23. If you don't see a transfer window at step 15, the file may automatically be saved to your Downloads folder (depending on your browser settings.) Use Finder to locate the .ciw file and click it. This should then prompt the transfer window, or open the file directly in EndNote.
24. EndNote X8 should transfer the records directly to your current library. If it doesn't, use the Look in: dropdown menu to find and click on your library file.
25. The references will be transferred to your library as an imported references group. Note that the transfer does not include full text.

Exporting references from the Swinburne search page: an exercise

1. Make sure that you have your EndNote library open.
2. Go to the Library homepage: <http://www.swinburne.edu.au/library/>
3. Type the words: **rainfall** and **"stormwater runoff"** in the search window.
4. Hit **Enter**.
5. Click the title for an item you are interested in.
6. Click the **Details** link.
7. Click the **Actions** dropdown.
8. Click **Export RIS**

The screenshot shows the Swinburne University of Technology Library search interface. The search bar contains the query "rainfall and \"stormwater runoff\"". The results page shows 452 results. The first result is "Perfluoroalkyl acids in urban stormwater runoff: Influence of land use" by Xiao, F; Simcik, Mf; Gulliver, Js. The "Details" link is highlighted with a red box. The "Actions" dropdown menu is also highlighted with a red box, showing options like "Add to My Account", "Email", "Print", "EasyBib", "EndNote Web", "RefWorks", and "Export RIS" (which is also highlighted with a red box).

9. You will get a transfer window. Click **OK**.
10. The reference is transferred. You will need to go back to the original library search results to get the publication date.

Want to collect a group of references and transfer them all at once?

1. Click **Log in** above the search box
2. Type in your SIMS account details and click **Sign In**.
3. Click the **Details** tab for an item you are interested in.
4. Click the **Actions** dropdown.
5. Click **Add to My Account**.
6. When you have added all the references you wish to transfer, click **My Account**
7. Click **Saved Items**
8. Click the top tick box next to Type if you want them all, or tick individual items to select a few.

The screenshot shows the Swinburne University of Technology library website. The top navigation bar includes links for STUDY AT SWINBURNE, RESEARCH, BUSINESS & PARTNERSHIPS, INTERNATIONAL, ABOUT, CONTACTS, LIBRARY, STAFF, and CURRENT STUDENTS. The LIBRARY link is highlighted. Below the navigation bar, there is a search bar and a 'Search' button. The 'Search' button is highlighted with a red box. Below the search bar, there is a 'Search' button and a 'Push to RIS/PushTo' button. The 'Push to RIS/PushTo' button is highlighted with a red box. Below the search bar, there is a 'Search' button and a 'Push to RIS/PushTo' button. The 'Push to RIS/PushTo' button is highlighted with a red box.

Type	Author	Title	Added
<input checked="" type="checkbox"/> Article	Pednekar, Abhishek ; Grant, Stanley ; Jeong, Youn...	Influence of Climate Change, Tidal Mixing, and ...	19/12/14
<input checked="" type="checkbox"/> Book	Thomas A. Seybert	Stormwater management for land developmen...	19/12/14
<input checked="" type="checkbox"/> Article	Baxter, Janeen ; Wright, Erik Olin	The Glass Ceiling Hypothesis: A Comparative St...	15/07/15
<input checked="" type="checkbox"/> Article	Dotto, C.B.S. ; Deletic, A. ; McCarthy, D.T. ; Fletche...	Calibration and sensitivity analysis of urban dra...	19/12/14
<input checked="" type="checkbox"/> Article	Li, Dongya ; Wan, Jinquan ; Ma, Yongwen ; Wang, ...	Stormwater Runoff Pollutant Loading Distributi...	22/07/15
<input checked="" type="checkbox"/> Article	Murphy, Louise U. ; Cochrane, Thomas A. ; O'Sulli...	Build-up and wash-off dynamics of atmospheri...	22/07/15

Influence of Climate Change, Tidal Mixing, and Watershed Urbanization on Historical Water Quality in Newport Bay, a Saltwater Wetland and Tidal Embayment in Southern California
 Pednekar, Abhishek ; Grant, Stanley ; Jeong, Youngsul ; Poon, Ying ; Oancea, Carmen
 Environmental Science & Technology, Dec 1, 2005, Vol.39(23), pp.9071-9082

9. Select **"Push to RIS"**
10. Click **Go**.
11. You will see a transfer window. Click **OK**.
12. The records will be transferred to EndNote.
13. EndNote X8 should transfer the records directly to your current library. If it doesn't, use the Look in: dropdown menu to find and click on your library file.
14. The references will be transferred to your library as an **Imported references** group.

Looking at your library

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

The screenshot shows the Thomson Reuters Library window. The interface includes a top toolbar with icons for sync, user, notifications, and layout. The main area is divided into three panes: a left sidebar for navigation, a central list of records, and a right pane for details.

Annotations:

- Sync for automatic backup:** Points to the sync icon in the top toolbar.
- Find full text:** Points to the magnifying glass icon in the top toolbar.
- Change your screen layout:** Points to the layout icon in the top toolbar.
- Share research with others using EndNote online:** Points to the share icon in the top toolbar.
- Library summary screen - each line represents a record in your Library:** Points to a record in the central list.
- Reference quick edit pane:** Points to the right pane showing details for a selected record.
- Current Styles drop down menu:** Points to the style dropdown at the bottom of the right pane.
- Groups pane:** Points to the 'My Groups' section in the left sidebar.

Central List of Records:

Author	Year	Title	Rating
Shah, S. K.; Hashempour...	2013	Effect of hypnosis on induction of local anaesthesia, pain percep...	
Alfi, B.; Gava, N.	2013	Controlled outcome studies of child clinical hypnosis	
Alfi, S.; Arslan, U.; Karak...	2008	An unusual presentation of mad honey poisoning: Acute myocar...	
Al-Enaizan, N.; Davey, K. J.;...	2015	Effect of hypnosis on masseter EMG recorded during the 'resting...	
Al-Rubaei, Ahmed Mohamm...	2013	Long-Term Hydraulic Performance of Porous Asphalt Pavements in No...	
Alice, Farrington	2002	DISSOCIATION IN ADOLESCENT GIRLS WITH ANOREXIA: RELATIONS...	
Almond, Louise; Duggan, Lo...	2005	Test of the arson action system model in an incarcerated population	
Anderson, J. M.; Chhabra, N...		Maneuvering and stability performance of a robotic tuna	
Anderson, Jamie M.; Chhabr...	2002	Maneuvering and stability performance of a robotic tuna	
Anderson, K.	1998	Painless dentistry. Fact or fiction?	
Andersson, S. A.; Ericson...		Assured with electrical...	
Andersson, S. A.; Ericson...		Assured with electrical...	
Andrews, Jonathan		Concepts of insane arso...	
Angelo, Rui Pedro; Chambe...		Resources model: A c...	
Anonymous,	2003	Cyclone with force 186 mph winds devastates three South Pacific Isla...	
Anonymous,	2010	Underground offers emergency shelters	
Antin, Tamar M. J.; Hunt, Ge...	2013	Embodying both stigma and satisfaction: an interview study of African...	
Armstrong, Deanne; Shakes...	2014	Predicting post-traumatic growth and post-traumatic stress in firefight...	
Arora, Amarpreet S.; Reddy...	2013	Multivariate analysis for assessing the quality of stormwater from diffe...	
Ascioglu, M.; Ozesmi, C.	1996	Effects of Grayanotoxin-1 on threshold intensity and compound action...	
Auld, J. M.	1989	Uses of hypnosis in general practice	
Bach, Peter M.; Deletic, Ana...	2013	Modelling Interactions Between Lot-Scale Decentralised Water Infrastr...	
Badra, A.	1981	[Why are you afraid to go to the dental surgeon? Known causes and m...	
Bai, Sen; Li, Jing	2013	Sediment Wash-Off from an Impervious Urban Land Surface	
Balachandra, K.; Swaminath...	2002	Fire fetishism in a female arsonist?	
Balachandra, Krishna; Swa...	2002	Fire fetishism in a female arsonist?	
Balko, Radley	2010	The Case for Bifurcated Trials	
Barber, J.; Mayer, D.	1977	Evaluation of the efficacy and neural mechanism of a hypnotic analge...	
Barnett, Jon	2005	TITANIC STATES? IMPACTS AND RESPONSES TO CLIMATE CHANGE I...	
Barr, M.	1979	Temporomandibular joint dysfunction and oro-facial pain	
Barron, Michael; Bradford, S...	2007	Corporeal controls: Violence, bodies, and young gay men's identities	
Barros Fuchs, Renata Herna...	2013	Enhancement of the nutritional status of Nile tilapia (Oreochromis nilo...	
Batty, Alex; Burchielli, Rosaria	2011	Out of the frying pan, into the fire? Persistent gender barriers in Austr...	
Beale, John; Jones, Warwick	2011	Preventing and Reducing Bushfire Arson in Australia: A Review of Wh...	
Beauchamp, Peter	2010	The 'servant' extraordinary Some account of the life of Thomas Beauc...	
Beck, H. J.; Birch, G. F.	2013	The magnitude of variability produced by methods used to estimate an...	
Bender, M. A.; Douthitt Seib...	1993	Sickle Cell Disease	

Right Pane Details (for 'Concepts of insane arso...'):

- Legal Note**
- PMCID**
- NIHMSID**
- Article Number**
- Accession Number**: 53483771
- Call**
- Label**
- Keywords**: PYROMANIA, ARSON, IMPULSE control disorders, KLEPTOMANIA, PATHOLOGICAL psychology, MONOMANIA, MENTAL illness, PUBERTY, MENTAL health, UNITED States, GREAT Britain, EUROPE
- Abstract**: This article surveys evolving and competing medico-legal concepts of pyromania and insane arson.
- Current Styles drop down menu**: APA 6th

- The **Preferences** option allows you to configure the software to your needs.
- The **File** dropdown menu allows you to open, close, save and create EndNote libraries. You can also import individual pdfs or folders of pdfs and EndNote will attempt to find the bibliographic data for you.
- The **Edit** menu:
 - Cut, copy and select references.
 - Define the output styles that format the display of references.
- The **References** menu:
 - Create, edit and delete references
 - Find duplicates
 - Find full text from a limited set of resources.
 - You can also work with URLs (online files) and file attachments (PDFs)
- The **Groups** menu:
 - Create, rename, edit and delete groups, which are a method of sorting your references.
 - Add references to a group

Searching your library

The search panel allows you to search the references and attached PDFs. Use the Layout button to turn on the **Search** panel.

Making changes to references

You may need to make some changes to newly-transferred references. You can edit references in two ways:

1. Use the reference quick edit tab at the bottom (or right of your screen, depending on your layout)
2. Double click to open the reference in a new screen. If you open a reference to view it in a new screen, you can close it again by using the **Command-W** shortcut, or by clicking on the close button. If you have made any changes, you will be prompted to save them.

Keywords

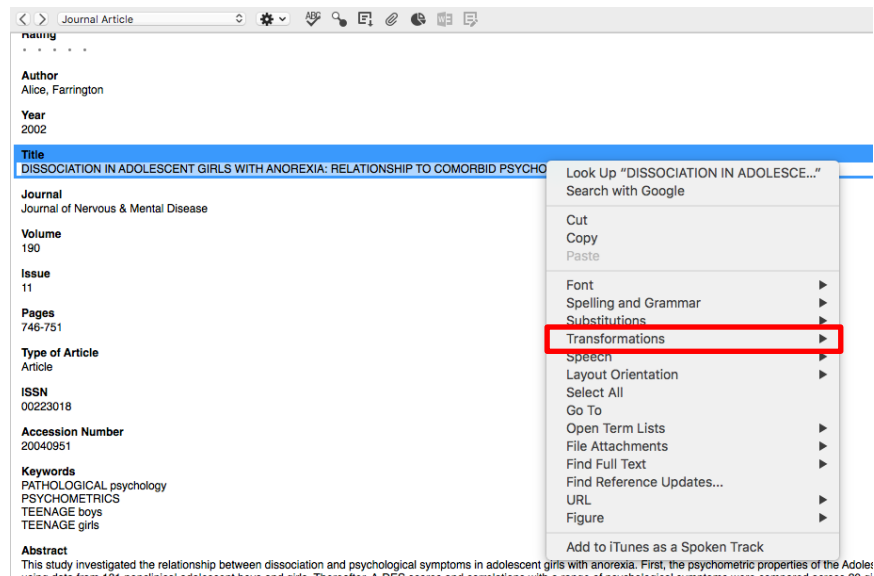
Add some descriptive words to the **Keywords** field to remind yourself of the important topics discussed in the article.

Put them on separate lines so that EndNote will recognise each separate keyword. EndNote gathers a keyword term list and will autosuggest words from the list if you start to type in a similar word. Type over an auto-suggestion if you need to use a new keyword.

Using the same keywords in articles on the same topics will make it easy for you to use the Search function to find similar articles.

Change capitalization

1. Open the reference in a new screen
2. Select the field (e.g. Title)
3. Highlight the text.
4. Control-click the highlighted text.
5. Select **Transformations**



6. Select your preferred option.
7. Close the window by using Command-W and click **Save**.

Newspaper articles showing as Generic

Newspaper articles from EBSCOhost often transfer as a Generic or Report reference type instead of a Newspaper article. It won't look right in your bibliography until you change it.

1. Change the layout to Right – Preview.
2. You should now be able to see the reference type at the top of the record. Click it to see the choices.
3. Select **Newspaper Article**
4. You may need to move the newspaper title and other details to the correct fields.
5. Control-W to close the window.
6. You will be prompted to save the change. Click **Yes**.

Finding Full Text for a Reference

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

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

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

1. Select the references you want to find the full text for, and click the find full text icon.
(**Command-A** selects all in a group.)



2. Or you can click the References menu > Find Full Text > Find Full Text.
3. Click **Continue** to accept the copyright warning if it appears.

The **Find Full text** area in the Groups pane reports the progress of the search. If EndNote cannot find the full text file, it will sometimes be able to attach the URL of the provider's Web page for the article for easier future access. EndNote will attach any found full text.

Manually adding full text articles and other attachments

If EndNote cannot automatically retrieve the full text you can manually save the full text from databases to the desktop of your computer, and then add the PDFs and other file types into the record. Drag and drop the pdf onto the record in the summary screen or:

1. Select the record by clicking on it
2. Click the References menu > File Attachments > Attach File menu.
3. Find the PDF or other format file on your computer
4. Click **Open**.
5. The file will be attached to your EndNote reference and library. Click another record.
6. You will be prompted to save the change, Click **Save**.

Note: if you attach Word or Excel files, please be aware that EndNote makes a copy of the original file and adds it to the DATA folder. Any changes made to the original file will not be saved to the copy in the DATA folder. Do not attach files that you haven't finished modifying.

Importing PDFs from your files

EndNote X8 can also import folders of PDFs you already have and attempt to find the bibliographic (publication) information for the more recently published articles. This will only work with PDFs created with current forms of software and where the publishers have embedded bibliographic data.

To import a folder of saved PDFs:

1. Open your EndNote library.
 2. Click on **File**.
 3. Click on **Import**.
 4. Click the folder in your Finder window.
 5. Check the Duplicates option. Select your preference.
 6. Click **Import**
 7. Any PDFs with embedded DOI data will be imported to new records with basic bibliographic data.
 8. All others will be added to individual default journal article records and the file name of the PDF will be listed in the title field. You will need to manually add bibliographic data for those references.
- ❖ If you choose to import duplicates to a duplicate library, EndNote will create one and report the number of standard and duplicate imports. Note that after transfer, EndNote may display the duplicate library – it is important to check the library's file name at the top of the screen.

Opening attached PDFs

1. Click the reference to select it.
2. Click References > File Attachments > Open with Preview to view the first attachment in a new window.
3. If there is more than one attachment, scroll down to the **Attachments** field in the preview window and click the attachment you wish to view.

Managing your references: Creating groups

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

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

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

Setting up EndNote sync for auto backup

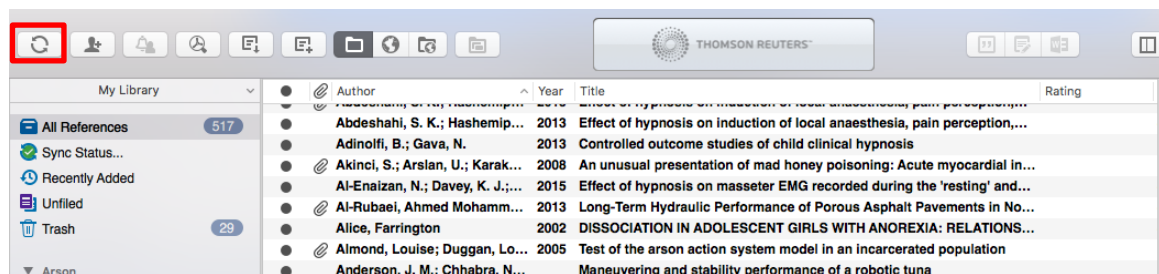
Syncing to a new EndNote online account

EndNote X8 gives you the ability to automatically back up references via EndNote online <http://www.myendnoteweb.com/> and sync across two or more computers.

You can then share the entire library via X8 or just a group (or selected groups) via EndNote online with fellow researchers. Information about sharing groups or libraries is available on our website.

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

1. Click the **Sync** icon on the toolbar



2. Click **Sign Up**.
3. Enter your email address twice - you do not have to use your Swinburne email account. This email address will become your login.
4. Click **Submit**.
5. Fill in all of the required fields that have a red *
6. Click **I agree**.
7. Your registration is complete. Click **Done**.
8. The Sync system will authorise your new account and add the details to EndNote X8. The library will automatically sync every 15 minutes and when you close the library. Change the settings in the Sync screen if required.
9. Click **OK** again to close the Preferences screen.
10. A new **Sync Status group** is listed in the groups pane.
11. Click the **Sync** symbol to carry out the first sync exchange.
12. If you have references in the library, you will be asked to make a compressed backup. Follow the instructions to do so.
13. The first sync can take a long time, especially if you have many references with full text. Please be patient - future syncing will be much quicker.
14. EndNote X8 and EndNote online will now sync automatically. Please remember to regularly back up your Word documents.
15. Want to check how much space you have left on EndNote Online? Click **Sync Status** in EndNote X8.

Syncing to an existing EndNote online account

1. Open your library in EndNote X8.
2. Click the Sync button in the toolbar
3. Type your existing EndNote online login and password into the EndNote Account Credentials fields.
4. Click **OK**.
5. You may be asked to register the computer for your EndNote online account. Fill in all of the required fields that have a red *
6. Click I agree.
7. Your registration is complete. Click Done.
8. The library will automatically sync every 15 minutes and when you close the library. Change the settings in the Preferences > Sync screen if required.
(Edit > Preferences > Sync for Windows or EndNote > Preferences > Sync for Mac)
9. Click OK to save the settings.
10. Want to check how much space you have left on EndNote Web? Click Sync Status.

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

1. These instructions assume you have already created and synced a library on the first machine. Make a note of the name of the library.
2. Open EndNote X8 on the second computer (Mac or Windows).
3. Click **File**
4. Click **New**
5. Create a new library with the **same** name as the original synced library.
6. Click the Sync button in the toolbar
7. Type your existing EndNote online login and password into the EndNote Account Credentials fields.
8. Click OK.
9. The library will automatically sync every 15 minutes and when you close the library. Change the settings in the Preferences > Sync screen below if required.
Edit > Preferences > Sync *for Windows or*
EndNote > Preferences > Sync *for Mac*
10. Click OK to close the Preferences screen.
11. Click the Sync symbol to carry out the first sync exchange.
12. The first sync can take a long time, especially if you have many references with full text. Please be patient - future syncing will be much quicker.
13. The synced library's references, attachments and groups will be added to the library on your second machine. Your computers will now sync to EndNote online and update automatically. Please remember to regularly back up your Word documents.

Using EndNote with Word 2016

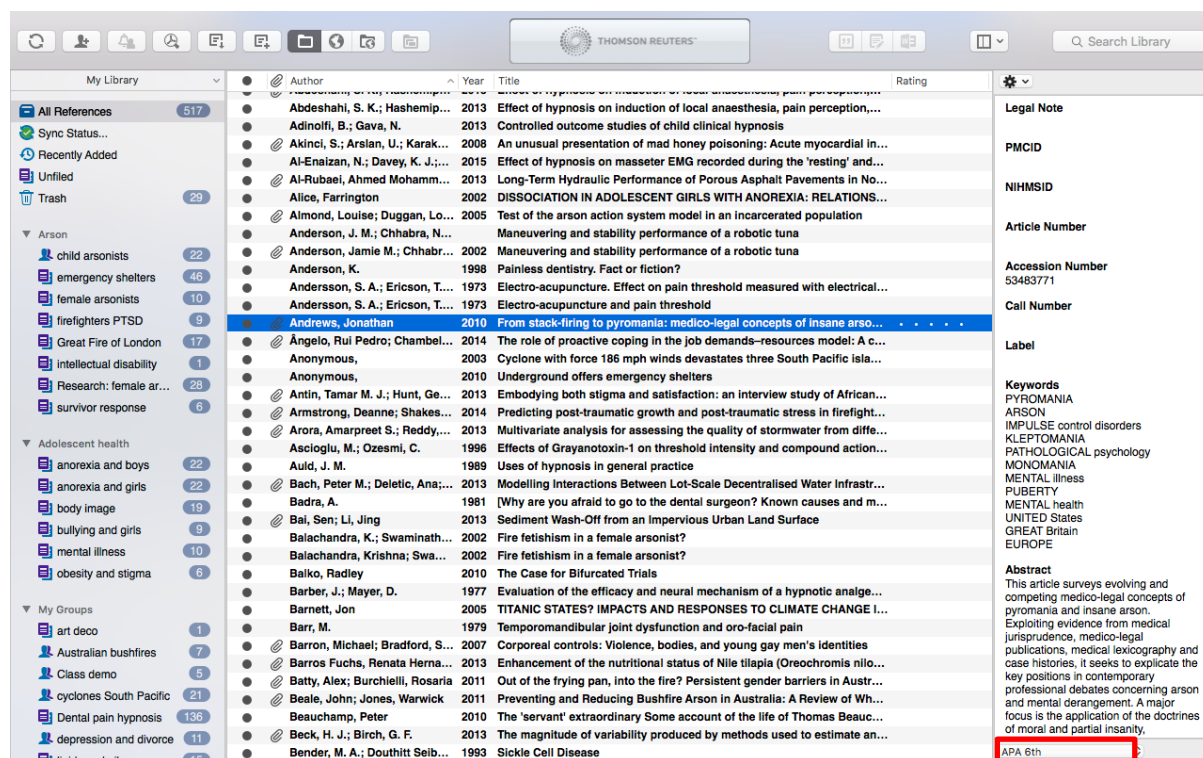
What are output styles?

An output style determines how the selected reference will be formatted and displayed in Word. Please check with your department to see if there is a preferred style.

If you need a style such as Chicago A or B, Nature, IEEE or many others, EndNote X8 has 400+ included styles.

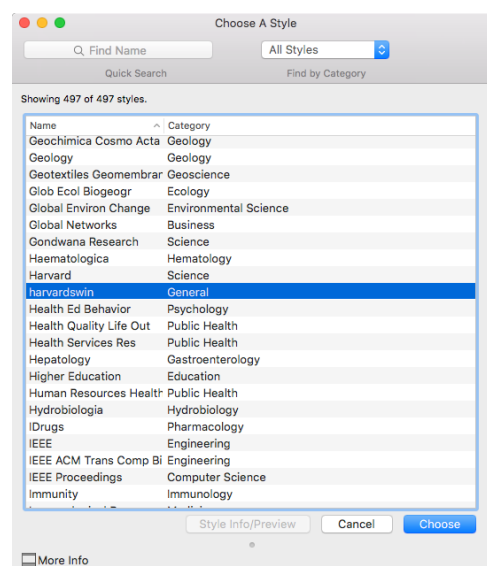
Where can I see which output style is active?

The output style is shown at the bottom of X8's preview window.



Activating a style within EndNote:

1. Click the **Current Style**.
2. Click **Select another style**.
3. Scroll through and click the style you wish to activate.
4. Click **Choose**. The style is now active within EndNote.



Downloading a style not included in EndNote:

Many departments require the Swinburne Harvard style, based on the “Harvard system: in-text references, reference lists and bibliographies” guide. The Harvard style included with EndNote does not match Swinburne's Harvard style.

There is a Swinburne Harvard output style file available on the Swinburne EndNote webpage at <http://www.swinburne.edu.au/library/referencing/references-endnote/endnote/>

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

1. Go the library's EndNote page at <http://www.swinburne.edu.au/library/referencing/references-endnote/endnote/>
2. Click the **Swinburne Harvard output style** header.
3. Click on the downloadable link for the Swinburne Harvard style.
4. You should be offered a chance to open or save the file. Click **Save File**.
5. Click **OK**.
6. The file is saved to your Downloads directory (depending on your browser preferences)
7. Move the style file to the Styles folder in your **Applications > EndNote X8 > Styles** folder.
8. You will need to activate the style in EndNote or Word in order to use it.

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

1. Go to <http://endnote.com/downloads/styles>
2. Type in the style or journal name
3. Click **Apply**.
4. Click the download link for your style.
5. Then follow the steps above to save the style to your **Applications > EndNote X8 > Styles** folder.

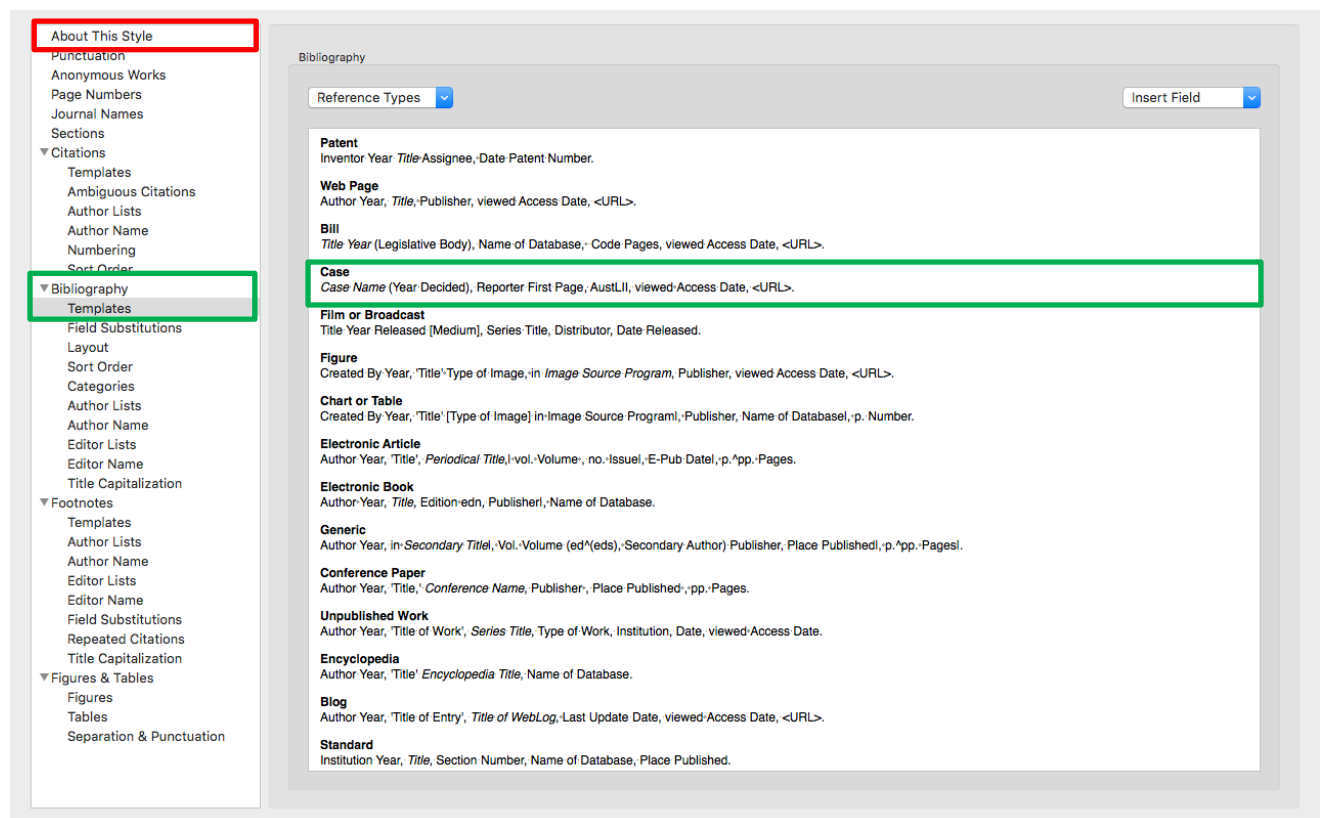
How do I know which data fields a style uses?

Different types of research have different types of publication information. For example, a journal article may have volume, issue or date details that a webpage would not.

A style can format your publication information, but only if the information is in the right fields. Many styles, including the Swinburne Harvard style, have guidelines.

1. Make sure the style is active.
2. Click Edit
3. Click Output Styles
4. Click "Edit <output style name> e.g. Edit harvardswin
5. The "About this style" tab may contain detailed instructions for entering publication information.
6. You can also check the Bibliography -> Templates section. This will list each of the fields that are checked for a particular reference type. In the example below you are prompted to fill in the following fields:

Case Name -> Year Decided ->Reporter ->First Page ->Access Date ->URL.



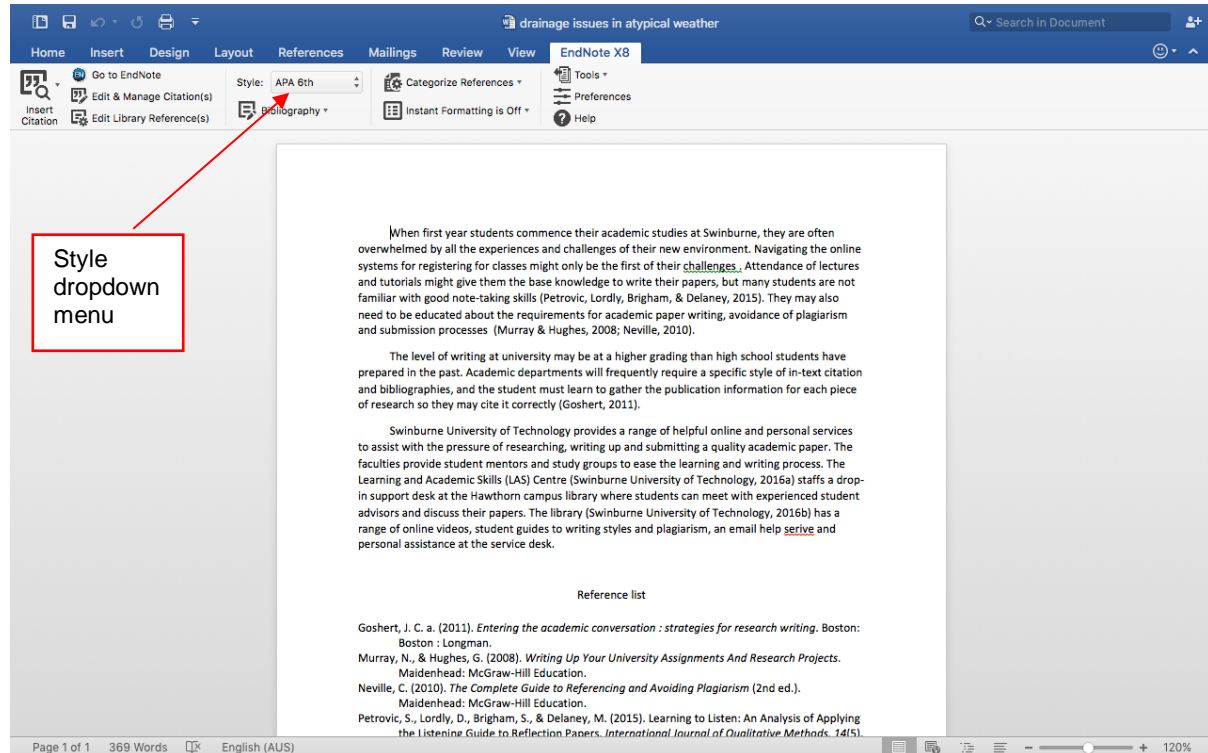
Doing so will generate a reference that looks like this:

R v Ramage (2004), VSC 508, AustLII, viewed 4 April 2014, <[<http://www.austlii.edu.au/cgi-bin/sinodisp/au/cases/vic/VSC/2004/508.html?stem=0&synonyms=0&query=title\(r%20and%20ramage%20\)>](http://www.austlii.edu.au/cgi-bin/sinodisp/au/cases/vic/VSC/2004/508.html?stem=0&synonyms=0&query=title(r%20and%20ramage%20))>.

7. Click **Command-W** to close the Style window.

Activating a style within Word 2016:

1. Start Microsoft Word 2016.
2. Open a new document.
3. When you install EndNote X8 onto your computer, it automatically adds an EndNote tab.
4. Click the **Style drop down menu**.



5. Click **Select another style**.
6. Click the grey **Name** header to sort the styles alphabetically if necessary.
7. Click the first style, then type the first couple of letters of the style name to jump down the list.
8. Type **amer**
9. Click the style you wish to activate. For this example, find and click on **Amer Economic Review**.
10. Click **OK**.

If you need to change the style of your bibliography at a later date, use the Current Style drop down menu on the EndNote X8 toolbar to choose an active style or activate a new one. EndNote X8 and Word 2016 will automatically reformat your document.

Inserting citations into the text: an exercise

Now that you have some records in your library, Word and EndNote can work together so that you can create a Word document with correctly formatted citations and a bibliography. This feature is called **Cite While You Write**. You will be able to concentrate on writing your essay or thesis, with the knowledge that EndNote will handle the correct punctuation and formatting of your references.

1. Make sure the EndNote library that contains the references you wish to cite is open. For the example and exercise below, we will use our new library.
2. Open a new Microsoft Word document.
3. Type in a few short sentences or generate and copy some Latin text from <http://www.lipsum.com>
4. Click at the end of the first sentence.

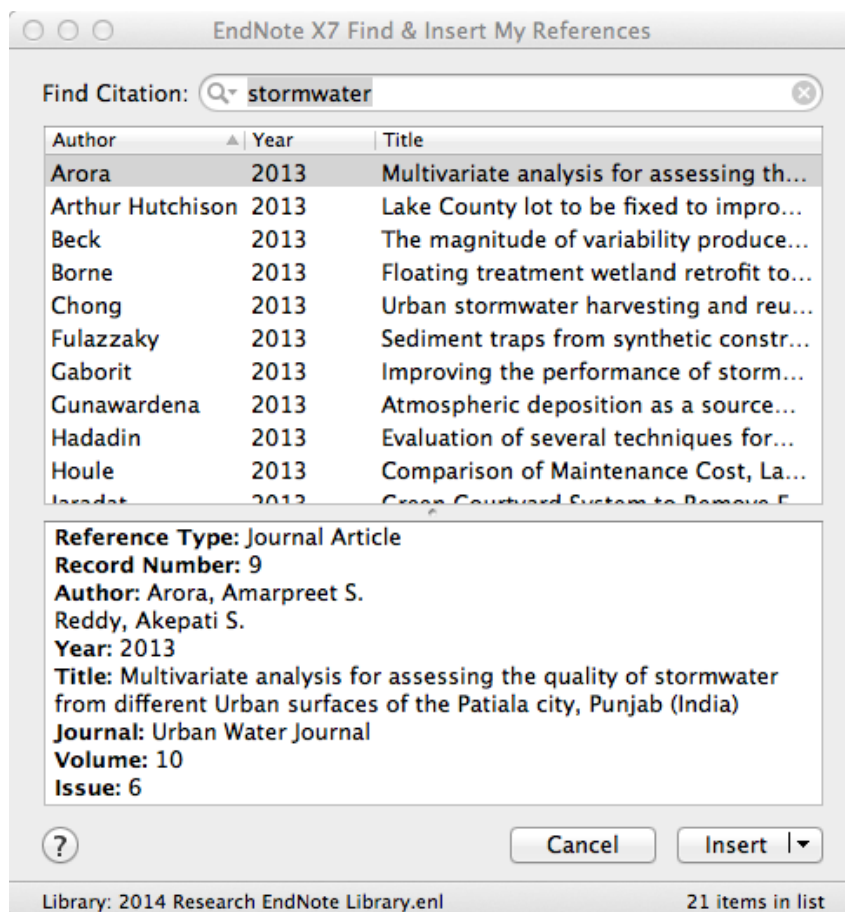
EndNote allows you to insert references in a number of ways.

- a) You can select an item from EndNote's summary screen and use the **Insert Citation icon** to drop the reference into the Word document.
- b) You can click the **Find Citation icon** (magnifying glass) in the Word toolbar
- c) You can also use the **Tools > EndNote X8 > Find Citation(s)** menu option.



If you choose option b) or c) EndNote displays a Find Citation(s) dialog window.

5. Type an author's last name, keyword or year into the "Find and insert citations" box. For this example, type the phrase **stormwater**.
6. Hit **Enter**.



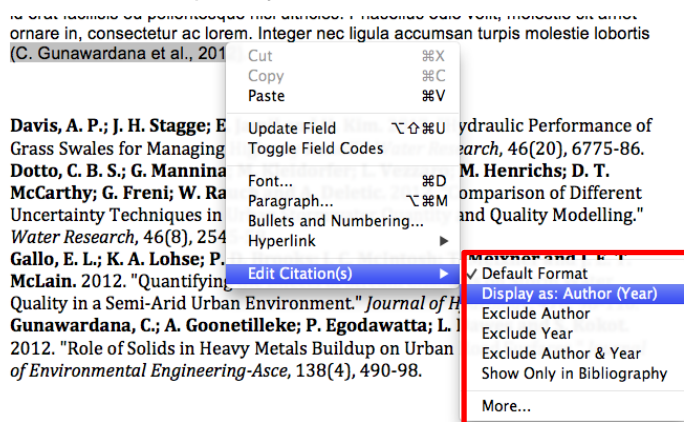
7. EndNote compares the identifying text to your EndNote references and then lists the matching references. When multiple references match the search, they are listed so you can identify, highlight, and insert the appropriate reference.
8. Click on a reference to select it. If several papers might be relevant for an in-text citation, hold down the **Command** key and click on the references you wish to cite.
9. Click **Insert**. A single reference will be inserted into the text within its own bracket; multiple references will be inserted into a bracket in a sort order according to your chosen output style.
10. Now save the EndNote-connected Word document.
Do not move this file out of that directory later. You may break the links between EndNote and Word and strange things may happen to your bibliography and in-text references.

Changing a reference's appearance:

You can quickly customise a formatted citation's appearance by

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

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



Adding text and pagination

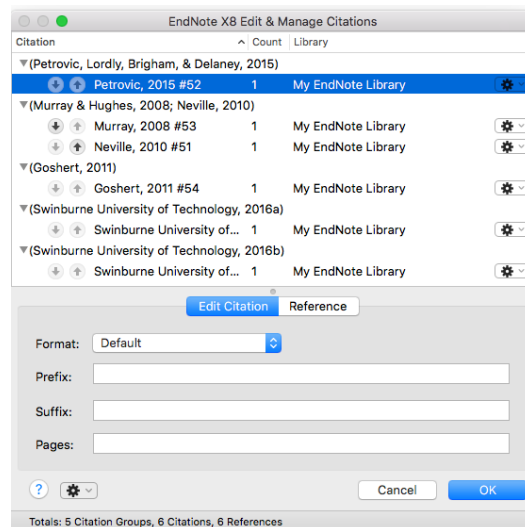
You may wish to modify citations to add pagination details or "see also" references.

The following modifications are available:

Sample citation	Bender's discovery (Bender, 2004)
Prefix	Add preceding text, such as "Cited in " Make sure you leave a space after the text e.g. the discovery (as cited in Bender, 2004) e.g. the discovery (see Bender, 2004)
Suffix	Adds following text. Use this to add page numbers after the citation. Make sure you put a space before the text e.g. the discovery (Bender, 2004 p.4)
Pages	This field does not work with all output styles. We recommend you use the Suffix modification instead.

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

1. Click the **Citations** dropdown in the EndNote toolbar.
2. Click **Edit and Manage Citations**
3. The **Edit & Manage Citations** dialogue box will be displayed. All the citations within the document will be listed. Click the citation you want to customise.



4. Customise the citation as needed in the **Edit Citations** section of the window.
 - a. Use the format dropdown menu to change the appearance of the in-text citation
 - b. Use the Prefix for "see also" or "as cited in"
 - c. Use the Suffix for page details.
5. If you wish to change one reference within a group, make sure you click on the reference in the "Citations in document" window first, to ensure you change the correct reference.
6. Click **OK**.

Safely copying text and references between documents

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

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

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

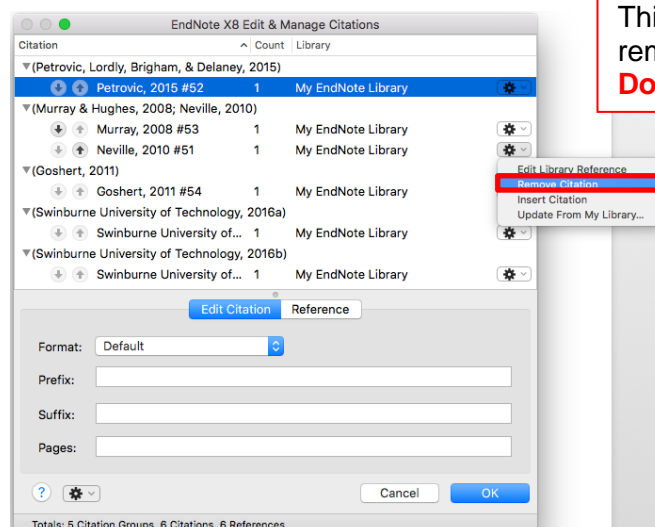
1. Highlight the desired text
2. **Command-C** to copy the text.
3. Switch to the other document and click where the pasted text should appear.
Click Edit > Paste Special or Control-Command-V
4. Click "Unformatted text."
5. Re-link the EndNote reference.

Safely deleting references

Please **do NOT** delete unwanted citations by highlighting them and hitting the delete key. While doing so does remove the unwanted citation's text, it leaves all of the "behind the scenes" coding that allows EndNote X8 and Word to work together. This orphaned code can cause all sorts of problems later, including citations appearing out of order.

If you wish to remove a citation completely:

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



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

5. Click **OK** to remove the citations and code.

Where can I get help with EndNote?

The Swinburne Library EndNote page:

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

Any training videos, patches, Swinburne output style and changes to the training notes will be listed here, as well as frequently asked questions.

Need to refresh your skills? The EndNote for Windows and Mac online training series is available via iTunesU, YouTube or from our website.

Search the help menu within EndNote

The EndNote website:

<http://www.EndNote.com>

You can download thousands of output styles from this website and view online tutorials.

EndNote discussion forum:

<http://forums.thomsonscientific.com/ts/?category.id=EndNote>

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

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

Checklist for using EndNote on your own computer

Create a Research folder on your desktop for your personal EndNote library and Word documents. This makes saving and backing up easy.

Save your Word documents to the Research folder.

EndNote creates links to Word documents. If you move the file, the links may be broken between EndNote and Word and strange things may happen to your bibliography and in-text references. Having all of your Word documents in the same place also makes it very easy to back everything up.

Write your chapters in separate Word files. Large files slow down Word performance. We can help you combine them later.

Regularly back up your library and Word documents

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

Sync between Windows and Mac

If you use Windows computers at one place and a Mac at another, use EndNoteSync to share your library easily between the two computers and platforms. They will be always be up-to-date.

Sync for automatic backups with EndNote online

EndNote Sync enables you to access your research on the Web and on other computers with EndNote X8. If you use more than one computer, or use a Mac and Windows at different locations, this is an ideal way to make sure each computer's library is kept current.

Sync can automatically backup your EndNote references and attachments, but **not** your Word documents. Once you have synced your EndNote X8 and Web libraries, click **Sync Status** in the **Groups panel** to see what you have already uploaded.

Step-by-step instructions for setting up Syncing can be found on our website:
<http://www.swinburne.edu.au/library/referencing/references-endnote/endnote/>

Share research information with colleagues via EndNote online and shared groups.

You can share selected groups via Endnote online. More information can be found about shared groups on our EndNote online resources.
<http://www.swinburne.edu.au/library/referencing/references-endnote/endnote-online/>