



# ***GRASP Advanced EndNote***

Additional functionality for long documents



This session will be recorded



*I acknowledge Whadjuk people as Traditional Owners and Custodians of the area  
Boorloo (Perth) which Curtin Perth Campuses are located.*

*I give my respects to their ancestors and Elders and Senior Knowledge Holders,  
past, present and those following in their footsteps.*



# ***Advanced EndNote***

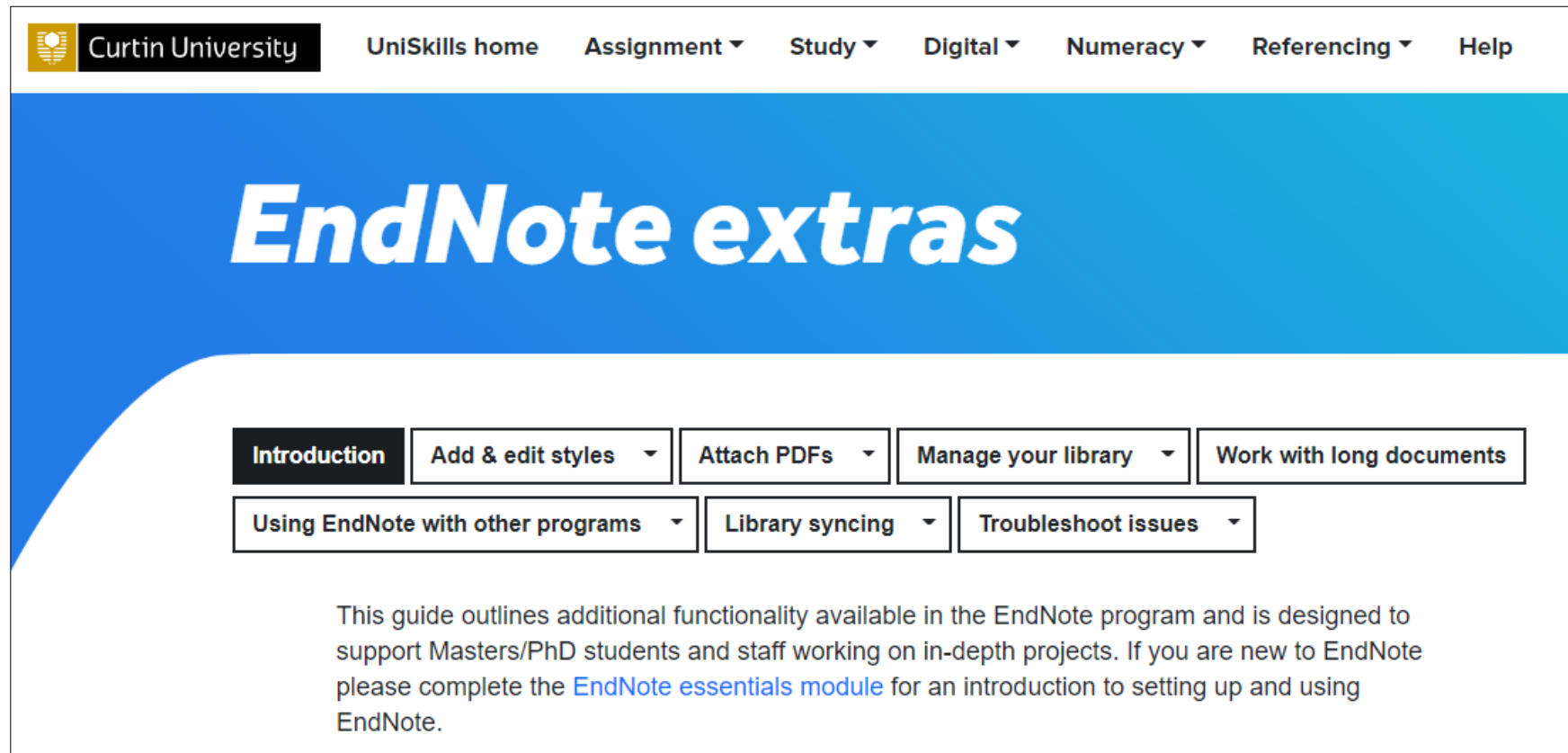
This session is designed to provide tips and advice to EndNote users who are working on in-depth projects (such as PhDs & Masters theses).

# ***In this session...***

1. Syncing/saving your library
2. Working with styles
3. PDFs and attachments
4. Managing your library
5. Working with long documents
6. Access beyond Curtin
7. Help with EndNote

# EndNote extras guide

<https://uniskills.library.curtin.edu.au/digital/endnote-extras/introduction/>



**Curtin University** UniSkills home Assignment ▾ Study ▾ Digital ▾ Numeracy ▾ Referencing ▾ Help

## EndNote extras

**Introduction** Add & edit styles ▾ Attach PDFs ▾ Manage your library ▾ Work with long documents

Using EndNote with other programs ▾ Library syncing ▾ Troubleshoot issues ▾

This guide outlines additional functionality available in the EndNote program and is designed to support Masters/PhD students and staff working on in-depth projects. If you are new to EndNote please complete the [EndNote essentials module](#) for an introduction to setting up and using EndNote.

# Syncing across multiple computers

The image shows a screenshot of the EndNote 20 software interface. The main window is titled "EndNote 20 - My EndNote Library-Converted.enl". The "Library" menu is open, showing options such as "Sync", "Advanced Search", "Sort Library...", "Find Duplicates", "Find Broken Attachment Links", "Open Term Lists", "Define Term Lists...", "Link Term Lists...", "Spell Check", "Find and Replace...", "Change/Move/Copy Fields...", "Recover Library...", and "Library Summary".

On the left side of the interface, there is a sidebar with the following sections:

- Sync Configuration
- All References (4)
- Recently Added (1)
- Unfiled (4)
- Trash (0)
- MY GROUPS
  - My Groups
- FIND FULL TEXT
- GROUPS SHARED BY ...
- ONLINE SEARCH
  - Library of Congress (0)
  - LISTA (EBSCO) (0)

In the foreground, an "EndNote Login" dialog box is open. It contains the following text and fields:

Using an EndNote account makes it easy to get the latest features and keep your library in sync. [Learn more](#)

Create a new EndNote Account

If you don't have an EndNote account or aren't sure, then click Sign Up.

EndNote Account Credentials

E-mail Address:

Password:

[Forgot Password](#)

# Find more referencing styles

Many more styles are available for download from the [EndNote website](#), including a number of journal styles.

Use the Style Finder below to search for a style name and/or citation style and/or publisher.

Citation Style

Publisher

2 results found

Style or Journal Name	Citation Style	Discipline	Date	
<a href="#">MDPI ACS Journals</a>	Non-superscripted Number	Multi-disciplinary	2021-02-17	<a href="#">Download</a>
<a href="#">MDPI Chicago</a>	Non-superscripted Number	Humanities	2019-12-18	<a href="#">Download</a>

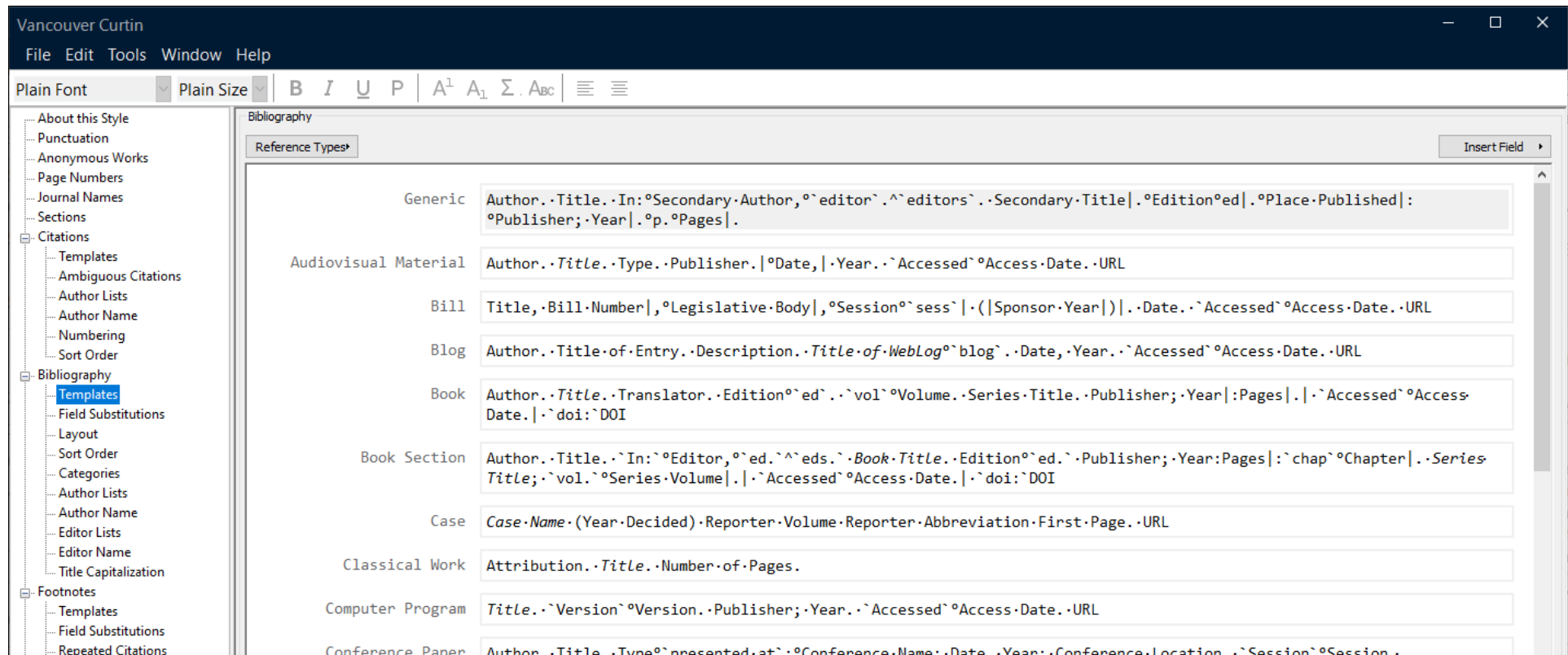
# ***EndNote tip #1***

If a journal name uses an ampersand (&) enter this when searching on the Output styles page



# Edit output styles

➤ You can [edit an existing style](#) to match your requirements

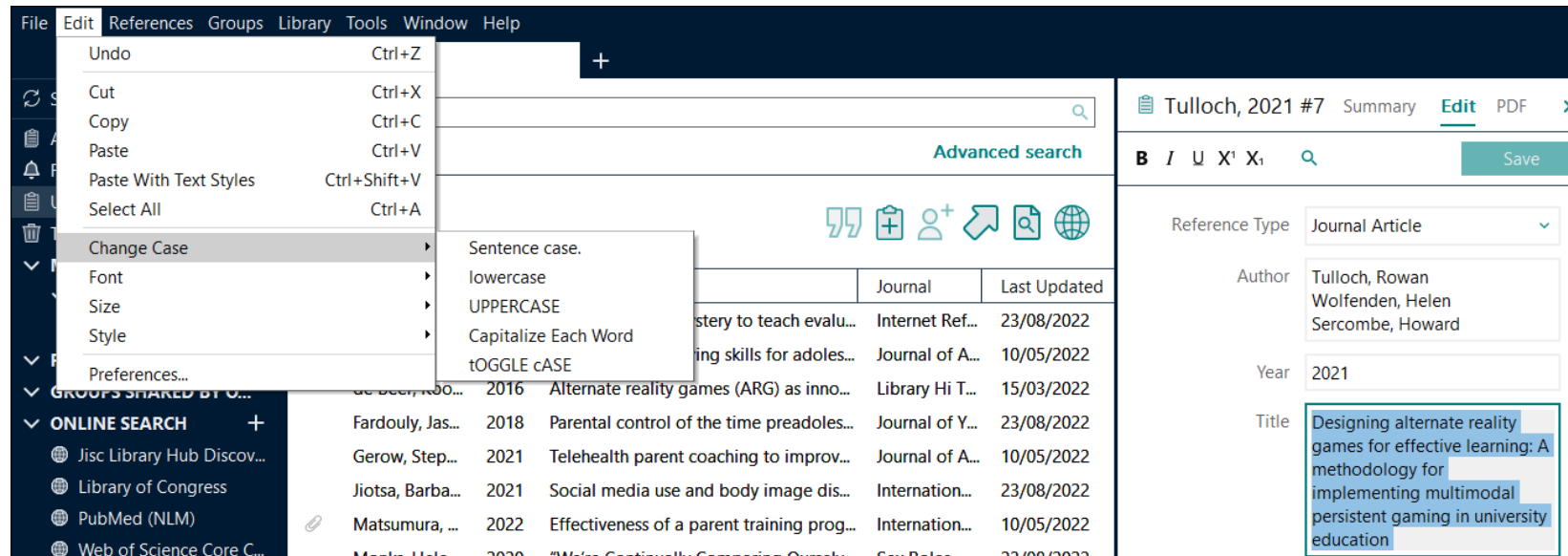


# ***EndNote tip #2***

If you can't locate an EndNote style, find another that is similar and edit to match your requirements

# Change Case

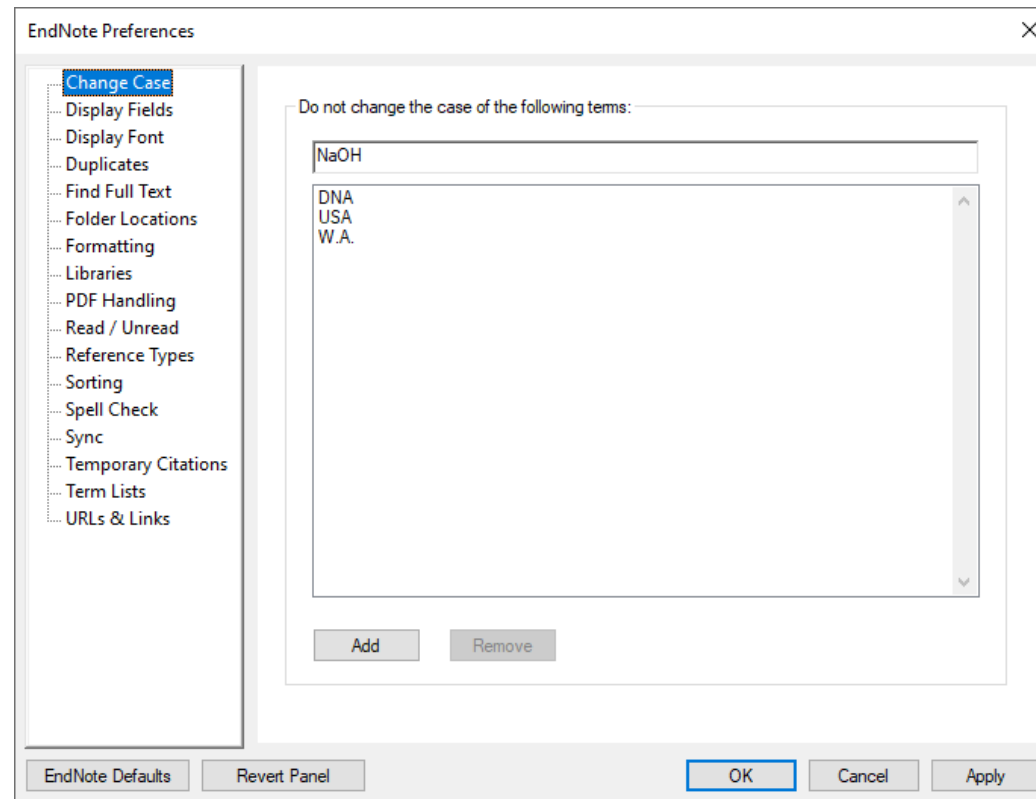
➤ To quickly change the capitalisation of titles etc. in the EndNote record.



Note that this will not take into account proper nouns so you may need to manually alter these to capitalise correctly.

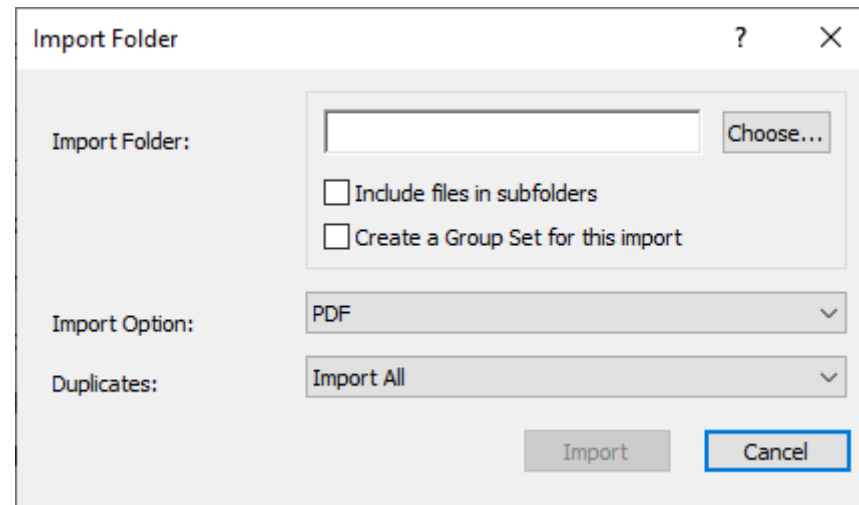
# Change capitalisation

- You can set your [preferences](#) so EndNote will display acronyms, abbreviations, chemical symbols etc. with your preferred capitalisation



# PDFs – Import PDFs

- EndNote allows you to [import a single PDF file or a folder](#) containing several PDFs and will then attempt to automatically create a reference for the PDF.



# Find reference updates

- The [Find Reference Updates](#) function searches for updated reference information such as author, title, journal info, DOIs etc.
- Useful if you have references created from PDFs that do not have a DOI or references from Google Scholar

EN Review Available Updates for Reference 1 of 4 Selected - [Dela Cruz, 2018 #80 (My EndNote Librarytest.en)]

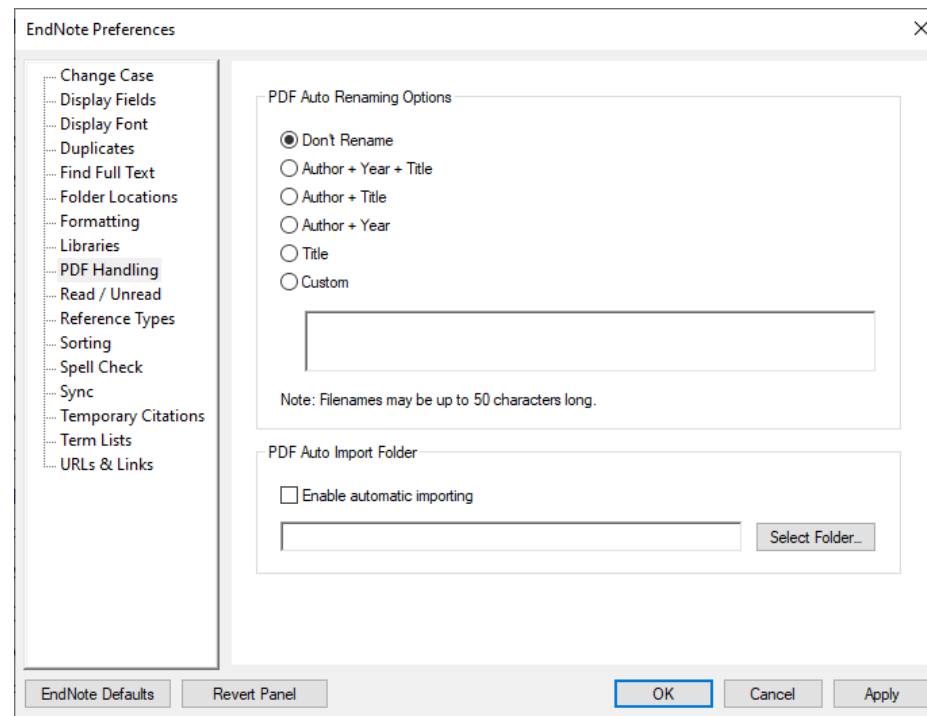
The available updates are shown on the left and highlighted in blue. "Update All Fields" copies every updated field from the Available Updates to My Reference, replacing anything already existing in the field(s) in My Reference. "Update Empty Fields" copies available updates only when the corresponding field in My Reference is blank. Text can also be manually copied and pasted into fields.

Available Updates		My Reference	
Reference Type	Journal Article	Reference Type	Journal Article
Author	Dela Cruz, R. Grant, J. Heck, J. E. Cash, H. L.	Author	Dela Cruz, R. Grant, J. Heck, J. E. Cash, H. L.
Year	2018	Year	2018
Title	Disparities in Adverse Perinatal Outcomes Among Pacific Islanders in the Commonwealth of the Northern Mariana Islands	Title	Disparities in Adverse Perinatal Outcomes Among Pacific Islanders in the Commonwealth of the Northern Mariana Islands

Buttons: Update All Fields ->, Update Empty Fields ->, Edit Reference ->, Save and Continue, Skip, Cancel

# PDFs – Automatic importing

- EndNote can [automatically import PDFs](#) from a folder on your computer and create references from the PDFs (if there is a DOI)



# ***EndNote Click***

- EndNote Click is a browser extension that allows you to collect full text PDFs and add to your EndNote Library. You will need to [sign up](#) for an EndNote Click account.
- Useful for collecting references from Google Scholar and PubMed

View PDF

EN



# ***Record numbers***

- EndNote automatically assigns a sequential record number to your references as they are added to your library (e.g. first reference added is #1, second is #2 etc.). Record numbers cannot be changed and if you delete a reference from your library, the number will not be reused.

 Lu, 2009 #101

# Change display fields

- EndNote allows you to change the [fields](#) (Author, Year, Title etc.) that are displayed and move the order they appear in the Reference panel in your library.

The screenshot shows the EndNote interface. On the left is a dark sidebar with navigation options like 'Sync Configuration', 'All References' (88), 'Recently Added', 'Unfiled' (88), 'Trash', 'MY GROUPS', 'FIND FULL TEXT', 'GROUPS SHARED BY O...', and 'ONLINE SEARCH'. The main area displays a table of references under the heading 'All References' (88 References). The table has columns for Record Number, Author, Year, and Title. An 'EndNote Preferences' dialog box is open in the foreground, with 'Display Fields' selected in the left-hand menu. The right-hand pane of the dialog shows 'Fields to display in the library window' with three columns: Column 1 (Record Number), Column 2 (File Attachments), and Column 3 (Author).

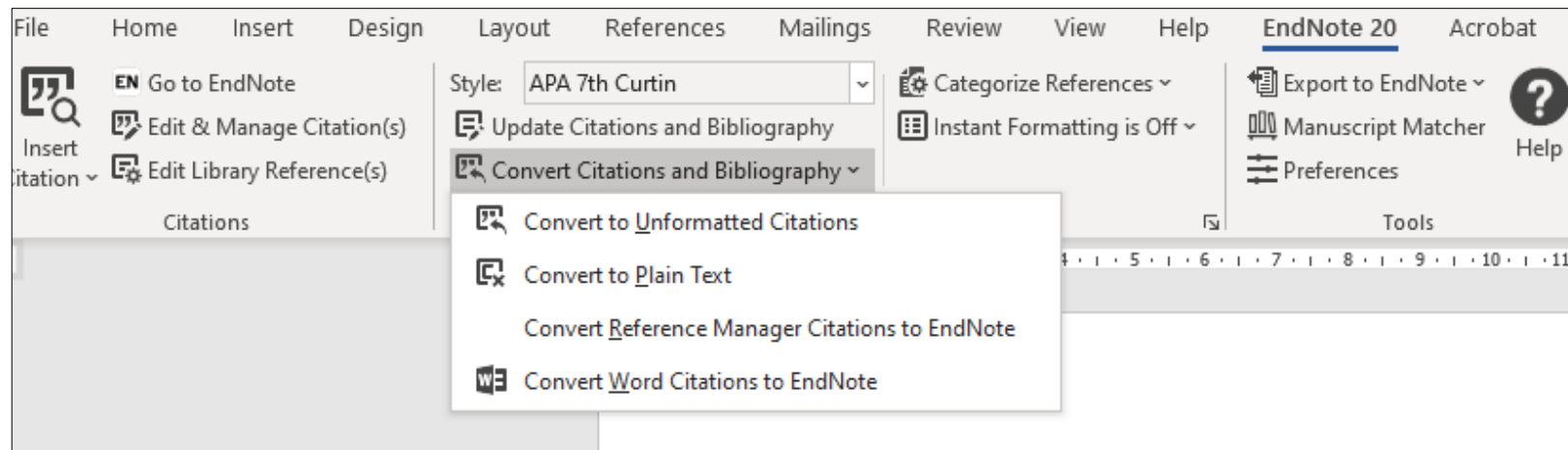
Record Number	Author	Year	Title
55	Abate, M. G.; ...	2020	Proximate determinants of infant mortality in Ethiopia, 2016 Ethiopian demog
66	Agorinya, I. ...	2018	Socio-demographic determinants of low birth weight: Evidence from the Kass
54	Aheto, J. M. K.	2019	Predictive model and determinants of under-five child mortality: evidence from
100			
58			
79			
13			
25			
39			

# ***EndNote tip #3***

Use the **Research Notes** field  
in the EndNote reference to  
record information (your own  
notes, quotes, gaps etc.)

# ***Unformatted citations***

- When working with [long documents](#), it is recommended that you use **unformatted citations** in Microsoft Word. Formatted citations take a longer time to process as EndNote will update all citations in the document each time a reference is added.



When unformatted, the citations will appear in the form {Author, year #Record number} and the reference list will disappear

# ***EndNote tip #4***

If you syncing to a different computer, the record numbers will be different. Click *Update Citations and Bibliography* in Word to associate with the references in the synced library

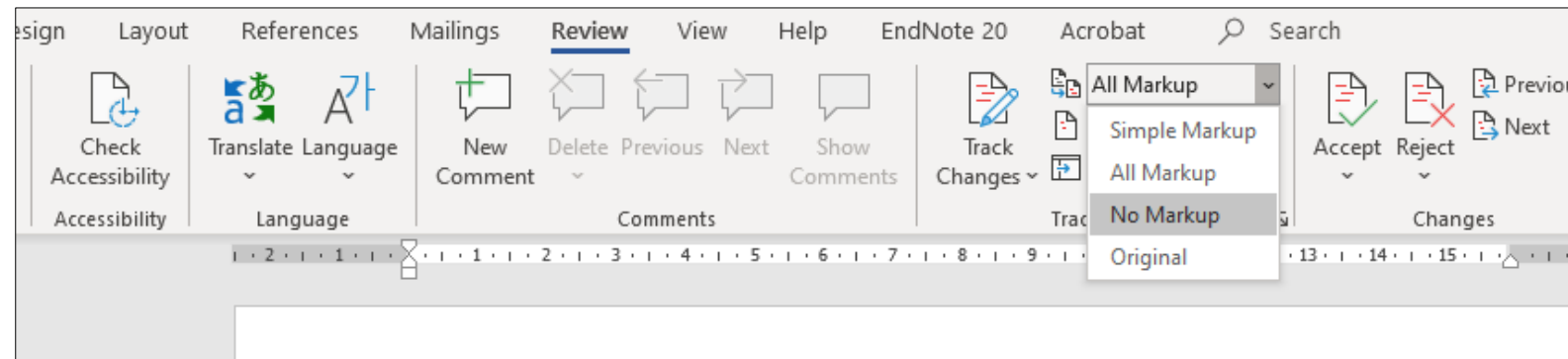


# ***Merge chapters***

- It can be easier to have separate documents for each of your chapters and then merge them into a single document at the end
- Convert each document to unformatted citations before copying and pasting into the new document

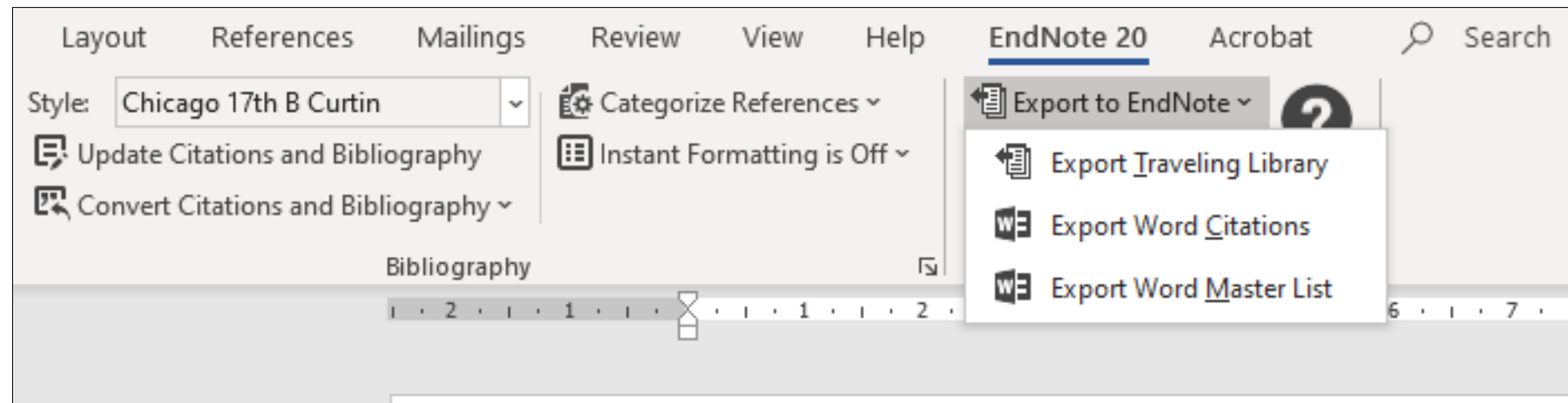
# Track Changes

- Using the [Track Changes](#) function in your Word document while EndNote formatting is active can cause errors or crash your document.
- Change the Markup option to *No Markup* or *Final* (depending on Word version)



# *Traveling library*

- As you insert formatted EndNote citations into a Word document, invisible field codes are included which contain the information necessary to form the in-text citations and reference list entry. It is possible to add the Traveling Library references to your EndNote library.

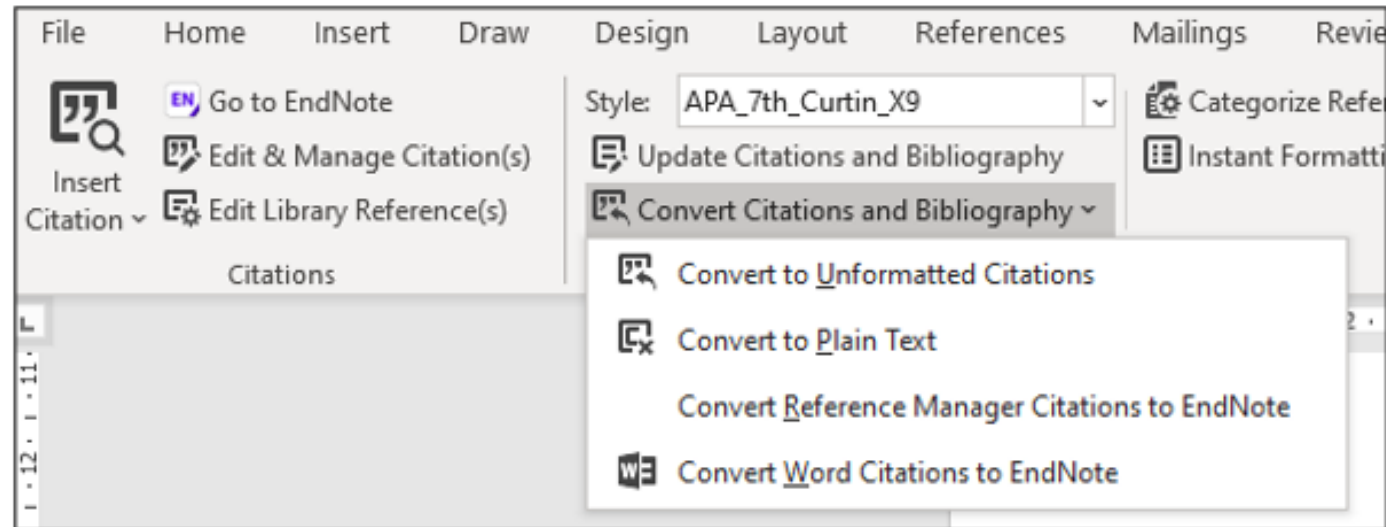


- Note: the Traveling Library cannot be exported if the document has been converted to plain text.



# *Convert to plain text*

It is recommended that you [convert your finalised document to plain text](#) before submitting for assessment or publication. Converting to plain text creates a second copy of the document which isn't linked to your EndNote library.



# ***EndNote tip #5***

It is important to keep the original document with the EndNote formatting in case you need to make changes to it later

# ***Access to EndNote after Curtin***

[Before you leave Curtin University](#), you can choose to either:

- Purchase your own copy of EndNote, or
- Sign up for an EndNote online account to retain access to your EndNote library.

**Note:** Change your Curtin email address which you use to login to EndNote online through Options > Email Address before you graduate as it will no longer be valid after graduation. When your 'premium' level access expires your EndNote online account will revert to an EndNote Basic account which will have reduced storage capacity and limited access to styles.

# ***Help with EndNote***

- EndNote Extras: [Troubleshoot issues](#)
- [EndNote](#) support website
- Try Googling error messages