Instructions on using Endnote for Ron’s literature template:

It is possible to use Endnote as a way of storing Ron Adam’s 5-item literature review template. Using this template is an effective way of organising what you have read. It makes it easy to group related references together and insert them into a Word document. You can also perform an analysis on the literature that you have read.

Here are the headings contained in the template:

a) Research question/issue being investigated  
b) Scope of investigation/research (e.g. group(s) being investigated, size of sample, country or locality in which research was undertaken, etc.)  
c) Methodology  
d) Theoretical framework  
e) Major findings  
(Any gaps you notice that require further research or investigation)

Follow these steps to modify Endnote to display this information for you:

PART 1

Copy one of the predefined styles (I have used the VU Harvard style), and change the name to reflect the modifications being made to it.

To modify your renamed Endnote style you need to click on Edit => Output Style => and select your style (use open style manager to find it if it’s not displayed)

Under the heading ‘Bibliography’ there is a Layout option => add the 5 items from the template here (see example below). You will notice each heading has the word custom underneath – i.e. Custom 1. This is linking to specific fields in the reference types. Now save these changes.
This customisation will direct Endnote to display these headings along with any text that you added to these fields under the reference you have inserted into Word. I’ve created a custom style called ‘Harvard_Aust_Demystify_Thesis 2017’ which already has these modifications. This is available from 

PART 2

Now you have modified the style the next step is to modify the ‘custom fields’ for the reference types. You can do all of them or the ones you know you will use.

Note: this customisation will be specific to the computer you set it up on – i.e. on your laptop but not on the University computers.

To modify the Custom Fields, go to Edit => Preferences => Reference Types => Modify Reference Types (see below)

Label 5 Custom Fields in EndNote with each of these: ISSUE, SCOPE, METHOD, THEORY, and FINDINGS (remember the custom fields we chose when we set up the style)

![Diagram showing EndNote options for customising reference types]

Click ok and add the same headings for each reference type you will use in your thesis. To do this select the reference type (see below) and click ok. Then click on Modify Reference Types
PART 3

It is also possible to modify the display settings in Endnote. You can get Endnote to display these fields you have created. This enables you to see at a glance some of the main themes coming up in the literature. You can apply some analysis to this.

To display these modified custom fields in the DISPLAY Panel, go to Edit => Preference => Display Fields. Please note there’s a limit of display fields you can use.

Now add the custom fields with corresponding heading to ensure they will appear in your Endnote Library display.

This is what it will look like:
And now you can insert references complete with ISSUE; SCOPE; METHOD; THEORY and FINDINGS.

Select relevant references and then click on Edit => Copy Formatted => and paste in Word – it will look like this:


**ISSUE:**
Librarian DM skills - gaps

**SCOPE:**
Graduate students
North Western University, United States

**METHOD:**
Survey Questionnaire

**THEORY:**
Action Learning

**FINDINGS:**
Gap in Librarian skills in specific areas