ENDNOTE Essentials for MAC
**(Only suitable for OSX 10.6.8 & higher)**

Install EndNote

- EndNote installs into **Finder > Applications > EndNote X7**
- Default is: *Create a new free EndNote Web account*; you may wish to change to *Do not integrate with EndNote Web at this time*
- To make sure your version is up-to-date select **Help** on the menu bar then click on **EndNote Program Updates**

Exercise 1   Start EndNote

- OPTION A: Open **Finder > Applications > EndNote X7 > EndNote Program**
- OPTION B: From within Word (2011): Using the EndNote toolbar (View > Toolbars > EndNote X7)
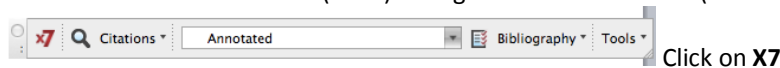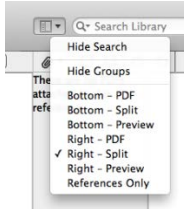
 Click on **X7**

Exercise 2   Open an EndNote Library and view some references

- In EndNote go to **File > Open Library**

- Find **Sample_Library_X7.enlx** (a practice Library that comes with EndNote)
  Hint It is in the *Examples* folder: *Finder\Applications\EndNote X7\Examples*

- Note the layout of the Library Window can be changed to include search, groups, pdf, reference, preview etc. Click on the Layout button on the upper right to alter the layout.

  Hint: You can click on the Layout button upper right side.

- Note the columns displayed in the Library reference list. Default is *Read/Unread Status, File attachments, Author, Year, Title…*
  HINT: Reorder column headings using drag-and-drop
       Right-click the headings to customize which columns display
- Double-click on a reference to display the full details in a new window.

- Within a reference record use the setting wheel drop down menu at the top to Show and Hide Empty fields

- The pdf preview pane can be added using the slide bar on the bottom right
- **Pdfs can be**

- Close the full reference by clicking on the red 'x' at the top left of the window.

Exercise 3   Sort the references in a Library

- Quick and easy: Click on column headings; click again to reverse. Try it with *Author.*
- Use **Tools > Sort Library** for a more complex sorting of references. The default is to sort by author (first) and within author by year (second).
  Click on the A-Z icon to select ascending/descending order.

Exercise 4 Searches within a Library

- Quick and easy: Click on a column heading. Then start typing the name that you want for that field. Try it with author.
- There is also a Quick Search box on the main toolbar. Searches all references and all fields including PDFs & PDF notes (results highlighted)
- For more advanced searching use *Tools > Search Library*
  OR Select *Show Search* from menu on top right, adjacent to search box.
- Select the field that you wish to search within then type in search terms.
  Use the AND operator (default) to combine terms.
  To search for any references containing the word bats & published after 1990:

- Return to the full list of references: Click on *All References* in the My Library pane (Left hand side of the screen).
- **NOTE:** The most recent search results are in the *Search Results* Group.

Exercise 5   Select a bibliographic style

- Display the Preview pane
- Select the style of your choice from the drop-down menu at the base of the preview.
  Use *Select Another Style* if your style is not listed

- Select (highlight) a reference in your Library. This will now be displayed in the style that you chose.
  NOTE: EndNote X7 installs only the most popular 100 Styles. Supplementary styles are available:
  o   QUT - https://www.library.qut.edu.au/research/toolkit/referencing/downloads.jsp#styles
      (QUT APA, QUT Harvard)
      e.g. APA6th_Feb2012_FIN.ens
  o   EndNote website - http://endnote.com/downloads/styles
- Download the selected file (Safari or Firefox) and save it to your Styles folder, which is typically located at **Finder\Applications\EndNote X7\Styles**. (**NOTE:** you will need Mac administrator rights.)

Exercise 6   Create a new EndNote Library

- *File > New*
- Name your library. An **.enl** extension will automatically apply.
  Make a note of where you save it. You might like to use the Examples folder
  Finder\Applications\EndNote X7\Examples
- You are now ready to begin adding references.

ADD REFERENCES TO YOUR LIBRARY

Exercise 7   Add references manually

- With your Library open, select *References > New Reference* or click on [icon] (top left)

- Select the appropriate Reference Type from the drop-down menu (journal article is the default.)

- Follow the Endnote Guidelines for *Entering References* handout (also available from https://www.library.qut.edu.au/research/toolkit/referencing/documents/LTR_EnteringReferences_ENX7_Sep2015.pdf) for the following examples:

Journal article:
Harrison, T. & Parker, R. A. (2010). Issues in cross-cultural comparative research. *Research & Theory for Nursing Practice 24*(4), 233-240. doi: 10.1891/1541-6577.24.4.233

HINT: EndNote APA 6th Style
DOI available (DOI field) – Use Journal Article reference type.
If no DOI available, type Retrieved from http://www.springerpub.com/product/15416577 (homepage of the journal) in the URL field – Use Electronic Article reference type.

Book:
Rosenberg, M. S., Wilson, R., Maheady, L., & Sindelar, P. T. (2004). *Educating students with behaviour disorders.* Boston: Allyn & Bacon.

Book chapter:
HINT: Use the **Book Section** reference type
Freud, S., & Breuer, J. (1998). Studies in hysteria. In J.M. Jenkins, K. Oatley & L. Stein (Eds.), *Human emotions: a reader* (pp. 30-38). Oxford: Blackwell.

Web page:
Cooper, H. L. (2010). A brief history of tactile writing systems for readers with blindness and visual impairments. Retrieved from http://www.tsbvi.edu/seehear/spring06/history.htm

Exercise 8   Add references using DIRECT EXPORT

- On Macs, we recommend using Mozilla Firefox as your browser with direct export from databases
- Having exported the references from the database, select the default Open with option, and click OK.
- EndNote will open and prompt you to select the EndNote library you wish to import the results into.

Some examples

Database	Procedure
Cochrane Library	Click on **Export Selected** at the bottom of the page Change the Export type to **Mac** Change the file type to **Citation & abstract** Click on *Export Citation* <u>Firefox</u>: …[Opening citation-export.txt box] appears *Open with EndNote X7* … Click OK <u>Safari</u>: Open *Downloads* folder Right click on citation-export.txt. Right click and choose *Open with …*. Select **EndNote X7** … [Choose an **Import Filter** box] Select *Cochrane Library (Wiley)* Select *Choose*
EBSCOhost	Go to *Folder View* of saved records. Select records. Click on the *Export* icon Select *Direct Export in RIS format (e.g. …EndNote…)* (default) Click on *Save* <u>Firefox</u>: EndNote automatically opens and imports records <u>Safari</u>: Open *Downloads* folder. Right-click on .ris file. Choose *Open with …* Select **EndNote X7**
Factiva	It is not currently possible to Direct Export from Factiva to EndNote X7 on Mac. Please follow the instructions for manually adding references.

Google Scholar	Configure to send reference to EndNote
	    o Select *Settings* (top right hand corner)
	    o Under *Bibliography Manager* select *Show links to import citations into* choose *EndNote*
	    o Click on *Save*
	 Import search results into EndNote
	    o Search Google Scholar
	    o Click on *Import into EndNote* for the reference you want
	
	 <u>Firefox & Safari</u>: Open *Downloads* folder. Open .ews file (will open directly into EndNote)

Informit *A+ Education* *APA-FT* *Health Collection*	Click on *Save* Change the Output Format to *EndNote Direct* Click on *Save Records* Note: Not all Informit databases work well with Direct Export <u>Firefox</u>: [Opening Informit_Results.txt box] appears. *Open with EndNote X7 …* Click OK

	Safari: Open *Downloads* folder. Right-click on file. Choose *Open with …* Select **EndNote X7**
ProQuest	Hover mouse over *Export/Save* Select ***EndNote, Reference Manager or ProCite*** from drop-down list Click on ***Continue*** Firefox: …[Opening ProQuest Documents.... box] appears ***Open with*** *EndNote X7 …* Click OK. Safari: Open *Downloads* folder Right-click on file and choose ***Open with …*** *EndNote X7*
PubMed	From the *Send To* drop down menu on the right: …[Choose Destination box] Select ***Citation Manager*** Click on ***Create File*** Firefox: [Opening citations. Bib box] appears ***Open with*** *EndNote X7…* Click OK Safari: Open *Downloads* folder Right-click on file and choose ***Open with …*** *EndNote X7*
Quick Find (QUT)	Click on the little folder on the top right of the record to save Click on the folder of ***Saved Items*** (top most right) Use the ***Export As*** drop down menu to select Endnote Save the file to the ***Downloads*** folder. Open ***Downloads*** folder Open file and select to ***Open with Endnote X7*** and select Endnote Library
ScienceDirect	Click on ***Export Citations*** …[Export Citations screen]: select *Citations and Abstracts* *RIS format (for Reference Manager, ProCite, EndNote)* Click on ***Export*** Firefox: EndNote automatically opens and imports records Safari: Open ***Downloads*** folder Right-click on file and choose ***Open with …*** *EndNote X7*
Scopus	Click on ***Export*** …[Output options screen]: Change the Export format to *RIS format (Reference Manager, ProCite, EndNote)* Change the Output to *Complete format* Click on ***Export*** Firefox: …[Opening scopus.ris box] appears ***Open with*** *EndNote X7…* Click **OK** Safari: Open ***Downloads*** folder Open file (will open directly into EndNote)
Web of Science	At the bottom of the page there is an Output Records box Default = Authors, title, source plus abstract Select *Full Record plus Cited References* if desired Save to: select ***EndNote*** Firefox: …[Opening savedrecs.clw box] appears ***Open with*** *EndNote X7 …* Click **OK**

|	Safari: Open *Downloads* folder
	Right-click on file and choose *Open with ... EndNote X7*

- Only the exported records display
  The most recent export is in the *Imported References* Group
- Open records and check content - change as necessary; add any comments.

CHECKLIST
Refer to the *Entering References* handout for specific details.

Essential to open each record and check content	
Reference Type	Is this correct?
Author(s)	Is capitalization and spacing correct? Are family names and first names in the correct order?
Year	Is the year of publication in this field?
Article Title	Check words that are capitalized – are they appropriate? Make sure there is no full stop at the end.
Journal Title	Make sure there is no full stop at the end. Check capitalization. Use full journal names. Change if they are imported as abbreviated.
Pages	Is the page range given? Some only show the initial page number.
DOI and URL	Delete or move URL to Notes if previewed reference displays both.

- With the reference open in a full window, there is the option to change the case of words highlighted, by clicking on the drop down *Edit* menu e.g. sentence case
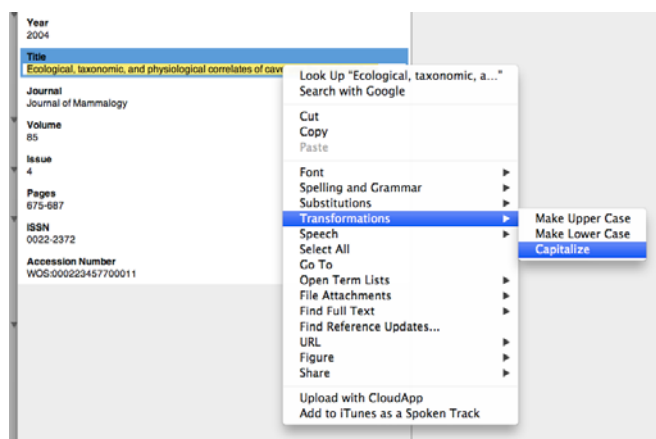
- Select the style of your choice and use *Preview* to check if any errors persist in the Reference or if there are any limitations with the EndNote version of the style selected. **Know your style well and what it *should* look like**.

Add additional information to your reference:

- *Name of Database* field – enter the database name where you found the fulltext of your article.

- *Access Date* field – enter today's date.

    HINT: Try a global change for all your new references, by selecting the option:

    Tools > Change/Move/Copy Fields

    Select the *Access Date* field from the drop-down menu.

    Insert before field's text: Type in the date *e.g. April 30, 2014* then Click OK.

- The *Label* field is one commonly used to categorise references, for example:

  o Assignment title/ Paper for Journal… / Thesis

  o Topic area or subject heading

  o Case Law etc. for Law bibliographies as outlined AGLC3 User Guide on https://www.library.qut.edu.au/research/toolkit/referencing/downloads.jsp#styles

Exercise 9   Add a PDF File to a reference

- You can store files with references in your Library – pdf, Word documents, image files… The files will be underlined copied from their existing location on your computer and stored in a PDF folder, which is part of the *.Data folder* attached to the Library. Up to 45 files can be attached to each reference.

  o Enable automatic renaming of .pdf documents as you import them: Enable automatic renaming of pdf documents as you import them
  Endnote X7 > Preferences > PDF Handling
  PDF Auto Renaming Options **e.g. Author + Year + Title.** Click **OK**

  o Locate a PDF file relating to one of your references and save it to your desktop.
  Drag and drop it onto a reference or into the *File attachments* field in that reference
  OR right click on the reference > *File attachments > Attach file.*
  A pdf icon appears in the File Attachments field. Up to 45 files can be stored here.
  NOTE: double-click on the reference to open the PDF attachment.

- Try the Find Fulltext function in EndNote. There is a comprehensive FAQ on the Library website https://www.library.qut.edu.au/research/toolkit/referencing/findftxtfaq.jsp

  o Configure EndNote
  EndNote X7 > Preferences > Find Full Text
  Tick all boxes and enter the following URLs
  Open URL path: http://sf5mc5tj5v/search/serialssolutions.com/
  Authenticate with: http://gateway.library.qut.edu.au/login?url=

  o Run Find Full Text
  Highlight references

  References > Find Full Text > Find Full Text or use:
  [Copyright and usage notice] Click **Continue**
  Monitor progress in the Find Full Text group set at the bottom of the Groups panel

  A PDF icon appears in the File Attachments field and a paperclip icon 🖇 appears next to the Author name in the Reference list.

Exercise 10 Open and annotate a PDF attachment

Click on the PDF viewer tab on the bottom right to display the document

Click 🔗 to open the PDF viewer then open

annotations tools:
to highlight text, underline strikethrough & add sticky notes
HINT: Right click highlighted text or the sticky note and select *Delete annotation* if you change your mind

Save changes made

Click 🔗 again to close

- To display your whole Library including the new references select **All References** in the Groups panel.

- It is possible to search within these attached PDFs.
  In the Advanced Search field:
    - Select *Any Field + PDF with Notes* to search within references and PDFs and Notes added
    - Select *PDF* to search within the PDF attachments
    - Select *PDF Notes* to just search within the attachments

Exercise 11 Add a reference and PDF using the PDF IMPORT filter

If you have a pdf document with a correctly formatted DOI on the first page, EndNote X7 can retrieve the bibliographic details from the crossref database and bring them into your EndNote library.

- Save a pdf of a recent journal article to your desktop.
- In EndNote, click on **File > Import**

Import File:	Click on *Choose File* to locate and select file; e.g. *JournalArticle.pdf*
Import Option:	PDF or PDF Folder

- Click on Import. <u>Only</u> the imported records will display.
  The more recent import is in the ***Imported References*** Group
- Open the records and check the content – make corrections if needed (use the Checklist on p. 6)
  Add any additional information
- To display your whole library, click on ***All References*** in the Group pane.
- If you have more than one pdf document in a folder, you can import all at once
    - ***Select File > Import > Folder***

NOTE: If bibliographic details are unable to be retrieved, only a title and the attached pdf will appear in the reference.
- <u>Only</u> the imported records will display.
  The most recent import is in the ***Imported References*** Group.
- Open the records and check the content – make corrections if needed (use the Checklist on p.5).
  Add any additional information.
To display your whole Library, click on ***All References*** in the Groups pane

Exercise 12 Organize references using Groups

Using groups to organize your references is better than setting up separate libraries for each topic.
<u>To set up any one of the following:</u>
Right-click in the Groups panel OR select **Groups** on the toolbar to open an options menu.

- Create ***Group Sets*** to bring groups together for the same broad subject area.
  For example: Group Sets for ***Sample_Library_X7.enlx*** include Psychology 101, Biology, Bats
  Select ***Create Group Set***. Name the new Group Set.
  The contents of each group are listed alphabetically. Click the *My Library* header to toggle between ascending and descending order.

- ***Custom Groups***
  Select ***Create Group***. Name your group.
  Add References to your Custom Group
  Select the references you wish to add to this group.
  Right click & select ***Add References To*** OR Drag and drop references into the group

o ⚙ *Smart Groups* – set search criteria to dynamically update these groups.
Display All References
Select *Create Smart Group*. A search box appears. Name your group. Enter a search and click on Create. The group of search results is saved into this Smart Group.
NOTE: When an existing reference is edited or new references are added to your library, they are checked against the search query. If there is a match, they are automatically added to the Smart Group.

o ⊛ Create **Combined Groups** to find references which are common to more than one group.
Select *Create From Groups*
Use the dialogue box to Name the combined group and select the groups you need to include. Click on *Create*. Only those references that are in both groups will appear.

NOTE: References can be added to more than one Group.
References deleted from a Group still remain in your library.
You can drag and drop groups to relocate them within the Groups panel.

ENDNOTE AND WORD WORKING TOGETHER

The EndNote toolbar should automatically appear in Word when you install the EndNote

software. [🔲 x7 🔍 Citations ▾ | Annotated | ▾ 📑 Bibliography ▾ | Tools ▾]

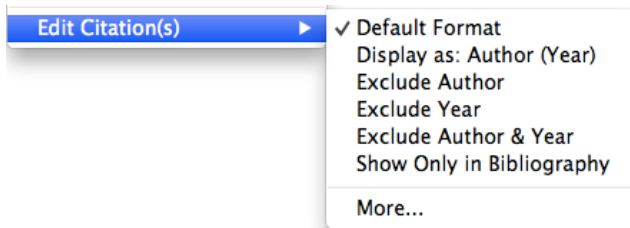**HINT:** If it is not showing go to *View > Toolbars* and select EndNote X7.

Exercise 13   Insert a citation into text

- In Word (2008 & 2011):
  o Place the cursor where you wish to insert the citation(s)
  o Click on Search Endnote 🔍 to search for the reference(s) you wish to insert e.g. enter first author and year, and click on Insert
     OR
  o In your EndNote Library highlight the reference(s) that you wish to insert.
     Select multiple references by holding down the Command key ⌘
  o On EndNote toolbar: Click on *Insert Selected Citation(s)* 🔴
     If the reference appears unformatted turn on *Instant formatting* ☰

     The in-text citation appears and a Bibliography is automatically generated at the end of your document.

Exercise 14   Edit in-text citations (Add page numbers…)

- Place the cursor where you wish to insert the citation(s) and select the relevant EndNote command from the *Citations* menu on the Endnote toolbar

- In Word (2008 & 2011), highlight the in-text citation you wish to edit. Right click > *Edit Citation(s)*

- Some quick options are available (also found in the Formatting drop down menu)
  To omit authors' names from citations, select *Exclude Author*
  To omit the year from citations, select *Exclude Year*
- Click on **More …** OR choose Edit Citation(s)   from the EndNote toolbar to display the Edit & Manage Citations box

Edit Citation(s) ▶ | ✓ Default Format
| Display as: Author (Year)
| Exclude Author
| Exclude Year
| Exclude Author & Year
| Show Only in Bibliography
|
| More...

- Use the Pages box to enter page numbers e.g. 67 - 71
- Use the Prefix box to add comments lik*e as cited in* (Include a space at the end of your text (Include a space at the end of your text)
- Use the Suffix box for additional information e.g. , Table 2
  (Include appropriate spaces)
- Click on the Edit Reference button and select:
  - *Edit Library Reference* to open the Reference within EndNote
  - *Remove citation* to delete from your Word document
  - *Insert citation* opens the *Find and Insert my References* window to find additional references for multiple citations

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NOTE: ALWAYS use the *Edit Citation(s)* command to make changes to in-text citations or to delete a citation. Just typing changes into the document risks corrupting the EndNote citations.

Exercise 15   Change the style of your citations and bibliography in Word

- In Word, select the appropriate style from the EndNote X7 toolbar dropdown menu. All references will update automatically
  OR
- Click on CWYW Tools, choose Bibliography Settings, and select output style.

Exercise 16   Create an independent bibliography

Produce a list of references to share with colleagues, or use for an annotated bibliography.
- Select the desired references in EndNote
- Select the desired style
- *Edit > Copy Formatted* to copy the references to the clipboard OR *Right-click > Copy Formatted*
  In your Word document, **Paste**

Exercise 17 Back up your EndNote Library

Don't lose all your hard work! Save it in more than one place, on more than one computer – at home, at work, to flash (USB) drive, burn it to a CD.

- Select *File > Compressed Library* to compress the Library (.enl file) and its attached folders into a single file to save. *The file extension will be .enlx.*
  NOTE: The Data folder contains a PDF folder (copies of articles attached to your references) and information on any Groups that you have set up.

- o Default = ***All References in Library***
  Options = *Selected Reference(s); All References in Group/Group Set*
- o Default = ***With File Attachments***
  Option = *Without File Attachments* (You may not want to attach files if sending to another institution for copyright reasons)

- The compressed file unzips automatically when you open it in EndNote.

More information about EndNote

- Help button on the EndNote Library toolbar [?]

- User manual (pdf) - loads onto your MAC with the EndNote software
  Finder/Applications/EndNote X6/EndNote.pdf

- QUT Library EndNote Help
  https://www.library.qut.edu.au/research/toolkit/referencing/
    - o ***Styles*** – download QUT APA style and QUT Harvard style
    - o ***Connect files*** – download the connect file for the QUT Library catalogue
    - o ***Online tutorials*** – access the 'Endnote essentials' PowerPoint & links to other online tutorials
    - o ***Endnote Help & FAQs***

- EndNote website online Help
  http://www.endnote.com/support/ensupport.asp
  www.endnote.com/training has online video tutorials

- EndNote & Mac online Help
  http://www.endnote.com/ENMac.asp

- Adept Scientific – Endnote List Archive
  http://lists.adeptscience.co.uk/endnote/

- Try using Google and YouTube to search for solutions

Congratulations! You have mastered EndNote Essentials.