

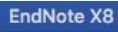


## ENDNOTE ESSENTIALS for MAC





### Install EndNote

- EndNote installs into  **Finder > Applications > EndNote X8**
- Select *Do not integrate with EndNote Web at this time*
- To make sure your version is up-to-date select **EndNote X8** on the EndNote menu bar then click on **Check for Updates** and follow prompts

### Exercise 1 Start EndNote

-  **Finder > Applications > EndNote X8 > EndNote X8**
- From within Word: Select the EndNote X8 tab. Click on 

### Exercise 2 Open an EndNote Library note the layout and view some references


- **File > Open Library**
- Find **Sample\_Library\_X8.enlx** (a practice Library that comes with EndNote)  
It is in the Examples folder: **Finder > Applications > EndNote X8 > Examples**
- Note the layout of the Library Window: Groups panel, Library, Search panel, Reference panel  
**HINT:** Click on the Layout button  in the upper right-hand corner to hide the Groups panel or change the Reference panel display. Right-Preview displays the Reference with Preview below
- Note the columns displayed in the Library reference list  
Default is *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
  - Use  (bottom right) to display *Reference only; Reference + PDF; PDF only*
  - Click on the drop-down menu of the Options icon (top toolbar)  to select or deselect *Show Empty fields; Show Rating Field*
  - Use the arrows (top left) to go to the next reference or the previous reference 

Close the full reference by clicking on the red close icon  at the top left of the window

### Exercise 3 Sort 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 Year (first) and within year by Author (second) then by Record Number  
Click on the A-Z icon to select ascending/descending order

### Exercise 4 Search within a Library

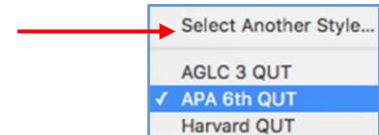
- Quick and easy: click on a column heading. Then start typing the name that you want for that field. Try it with author. Find the author *Smith* quickly.
- There is a Quick Search box on the main toolbar  
Searches all references and all fields including PDFs & PDF notes (results highlighted)
- For more advanced searching use the Search panel at the top  
If this panel is not visible, click on  and select **Show Search** OR use **Tools > Search Library**
- Select the field that you wish to search, then type in search terms  
Use the And operator (default) to combine terms

Search for any references containing the word parrot & published after 2010:

- Return to the full list of references: Click on **All References** in the Groups pane  
Note: The most recent search results are in the **Search Results** Group
- Search for references by the author Moss then return to the full list of references

### Exercise 5 Select a bibliographic style in EndNote

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



- Select (highlight) a reference in your Library. This will now be displayed in the Preview pane formatted in the style that you chose

**NOTE:** EndNote X8 installs only the most popular styles. Supplementary styles are available:


- QUT - <https://www.library.qut.edu.au/research/toolkit/referencing/endnote/downloads.jsp>  
(APA 6<sup>th</sup> QUT, Harvard QUT, AGLC3 QUT) e.g. *Harvard-QUT.ens*
- EndNote web site - <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 X8 > Styles  
**NOTE:** You will need Mac administrator rights

### Exercise 6 Create a new EndNote Library

- **File > New**
- Name your library. An **.enl** file extension will automatically apply.
- Make a note of where you save it. You might like to use the Examples folder:  
Finder > Applications > EndNote X8 > 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 
- Select the appropriate Reference Type from the drop down menu. (Journal Article is the default)
- Follow the guidelines on the *Entering References* handout for the following examples
- Close by clicking on the 'x' (top right) to save the reference

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:** If no DOI, type the homepage of the journal (homepage of the journal) in the **URL** field  
e.g. <http://www.springerpub.com/research-and-theory-for-nursing-practice.html>

EndNote APA 6th Style: Use Electronic article reference type

APA-6<sup>th</sup>-QUT Style: Use Journal article reference type

eBook:

Hughes, K. (2016). *Encouraging diversity in higher education* [ProQuest Ebook Central version]. Retrieved from <http://ebookcentral.proquest.com.ezp01.library.qut.edu.au/lib/qut/home.action>

**HINT:** Type the ebook platform in the **Type of Medium** field i.e. ProQuest Ebook Central version

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:



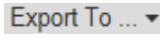
Cooper, H .L. (2010). A brief history of tactile writing systems for readers with blindness and visual impairments. Retrieved from <http://www.tsbvi.edu/seehear/spring06/history.htm>

**Exercise 8 Add references using DIRECT EXPORT**

- Search on your topic in the database of your choice
- **Mark the Reference(s) that you wish to export**
- Follow the Direct Export procedure for that database  
There are slight variations with the internet browser that you use  
Firefox is recommended as being easiest to use for Macs

*Some examples*

Database	Procedure
<b>Cochrane Library</b>	<p>Click on <b>Export selected</b> at the bottom of the page Change the Export type to <i>Mac</i> Change the File type to <i>Citation And Abstract</i> Click on <b>Export Citation</b></p> <p><u>Firefox:</u> ...[Opening citation-export.txt box] appears <b>Open with EndNote X8 ...</b> Click <b>OK</b></p> <p><u>Safari:</u> ...[citation-export...txt box] appears. Close this box Open Downloads folder. Right-click on citation-export..txt file <b>Open with EndNote X8</b></p> <p>...[Choose A Filter box] Select <b>Cochrane Library (Wiley)</b> Click on <b>Choose</b></p>
<b>EBSCOhost</b>	<p>Go to <b>Folder View</b> of saved records. Select records. Click on the <b>Export</b> icon Select <b>Direct Export in RIS Format (e.g...EndNote...)</b> (default) Click on <b>Save</b></p> <p><u>Firefox:</u> ...[Opening delivery.ris box] appears <b>Open with EndNote X8 ...</b> Click <b>OK</b></p> <p><u>Safari:</u> Open Downloads folder. Right-click on delivery...ris file <b>Open with EndNote X8</b></p>
<b>Factiva</b>	<p>Factiva does not currently work well with EndNote for Mac. You can follow the instructions for manually adding references</p>
<b>Google Scholar</b>	<p>Configure to send reference to EndNote Select <b>Settings</b> (top right of page) Under <b>Bibliography Manager</b> select <b>Show links to import citations into</b> Choose <b>EndNote</b> Click on <b>Save</b></p>

<p><i>NB: can only import 1 reference at a time unless you create a Google Scholar account</i></p>	<p>Import search results into EndNote          Search Google Scholar          Click on <b>Import into EndNote</b> for the reference you want</p> <p><b>Note:</b> Create an account to use <b>My Library</b> to export multiple records          Click <b>Save</b> below a search result          Open My Library to see all the articles saved          Select those you wish to export          Click on the Export button  at the top of the page          Select EndNote from the drop-down menu</p> <p><u>Firefox:</u> ...[Opening scholar..enw box] - import one reference          or ...[Opening citations..enw box] - import multiple references from My Library  <b>Open with EndNote X8 ... Click OK</b></p> <p><u>Safari:</u> Open Downloads folder. Right-click on scholar..enw file or citations..enw file  <b>Open with EndNote X8</b></p>
<p><b>Informit</b>  <i>A+ Education          AGIS Plus Text          APAFT          Health Collection</i></p>	<p>Click on <b>Save</b>          Change the Output Format to <i>EndNote Direct</i>          Click on <b>Save</b></p> <p><u>Firefox:</u> ...[Opening saveRecords box] appears  <b>Open with EndNote X8 ... Click OK</b></p> <p><u>Safari:</u> Open Downloads folder. Right-click on saveRecords... file  <b>Open with EndNote X8</b></p> <p>Note: Not all Informit databases work well with Direct Export</p>
<p><b>ProQuest</b></p>	<p>Click on <b>Save</b> [My Research and Export/Save options]          Select <b>RIS (works with EndNote..)</b> from drop down list          Click on <b>Continue</b></p> <p><u>Firefox:</u> ...[Opening ProQuestDocuments.. box] appears  <b>Open with EndNote 8 ... Click OK</b></p> <p><u>Safari:</u> Open Downloads folder. Right-click on ProQuestDocuments..ris file  <b>Open with EndNote X8</b></p>
<p><b>PubMed</b></p>	<p>From the <i>Send to</i> drop down menu on the right:          ...[Choose Destination box] Select <b>Citation Manager</b>          Click on <b>Create File</b></p> <p><u>Firefox:</u> ...[Opening citations.nbib box] appears  <b>Open with EndNote X8 ... Click OK</b></p> <p><u>Safari:</u> Open Downloads folder. Right-click on citations..nbib file  <b>Open with EndNote X8</b></p>
<p><b>QUT Quick Find</b></p>	<p>Click on  to save each record, then select the folder of saved items          Click on  Select EndNote from the drop-down menu</p> <p><u>Firefox:</u> ...[Opening export-endnote..ris box] appears. Click on <b>Save File</b>          Open Downloads folder. Right-click on export-endnote..ris file  <b>Open with EndNote X8</b></p> <p><u>Safari:</u> Open Downloads folder. Right-click on export-endnote..ris file  <b>Open with EndNote X8</b></p>

<p><b>ScienceDirect</b></p>	<p>Click on <b>Export</b> ...[Output options screen]                  Export file: RIS (for EndNote..) (default)                  Content: Citations and Abstracts (default)                  Click on <b>Export</b></p> <p><u>Firefox</u>: ...[Opening science..ris screen] appears  <b>Open with EndNote X8</b> ... Click <b>OK</b>  <u>Safari</u>: Open Downloads folder. Right-click on science..ris file  <b>Open with EndNote X8</b></p>
<p><b>Scopus</b></p>	<p>Click on <b>Export</b> ...[Output options screen]:                  Select <i>RIS Format (EndNote, Reference Manager)</i>                  Change the Output to <i>All available information</i>                  Click on <b>Export</b></p> <p><u>Firefox</u>: ...[Opening scopus..ris box] appears  <b>Open with EndNote X8</b> ... Click <b>OK</b>  <u>Safari</u>: Open Downloads folder. Right-click on scopus..ris file  <b>Open with EndNote X8</b></p>
<p><b>Web of Science</b></p>	<p>From the <b>Save to EndNote online</b> drop down menu                  Select <i>Save to EndNote desktop</i>                  ...[Send to EndNote box]                  Change the Record Content to <i>Full Record and Cited References</i> if desired                  Click on <b>Send</b></p> <p><u>Firefox</u>: ...[Opening savedrecs.ciw box] appears  <b>Open with EndNote X8</b>... Click <b>OK</b>  <u>Safari</u>: Open Downloads folder. Right-click on file  <b>Open with EndNote X8</b></p>

- EndNote automatically opens with your most recent Library available
- Only the exported records display  
 The most recent export is in the **Imported References** Group
- It is important to open records and check content - change as necessary; add any comments.

**CHECKLIST**

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

<b>Essential</b> to open each record and check content	
<b>Reference Type</b>	Is this correct?
<b>Author(s)</b>	Is capitalization and spacing correct? Are family names and first names in the correct order?
<b>Year</b>	Is the year of publication in this field?
<b>Article Title</b>	Check words that are capitalized – are they appropriate? Make sure there is no full stop at the end
<b>Journal Title</b>	Make sure there is no full stop at the end. Check capitalization Use full journal names. Change if they are imported as abbreviated
<b>Pages</b>	Is the page range given? Some only show the initial page number
<b>DOI and URL</b>	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 using **Edit > Change Case > 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 identify references, for example:
  - Assignment title/ Paper for Journal... / Thesis
  - Case Law etc. for Law bibliographies as outlined in the AGLC3 user guide on <https://www.library.qut.edu.au/research/toolkit/referencing/endnote/downloads.jsp>

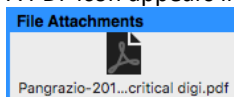
### Exercise 9 Add a PDF File to a reference

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

- Enable automatic renaming of pdf documents as you import them  
**EndNote X8 > Preferences > PDF Handling**  
PDF Auto Renaming Options e.g. **Author + Year + Title**. Click **Save**

Pangrazio-2016-Reconceptualising critical digi.pdf

- Locate a pdf file relating to one of your new references and save 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**
- Try the Find Full Text function in EndNote
  - Highlight references
  - **References > Find Full Text > Find Full Text** or click on  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



 Pangrazio, Luciana      2016      Reconceptualising critical digital literacy


There is a comprehensive FAQ on the Library website


<https://www.library.qut.edu.au/research/toolkit/referencing/endnote/support.jsp#findfulltext>

## Exercise 10 Open and annotate a PDF attachment

Open and annotate your PDF document:

Click on the PDF Viewer tab in the Reference panel to display the document


Click  to open the PDF Viewer

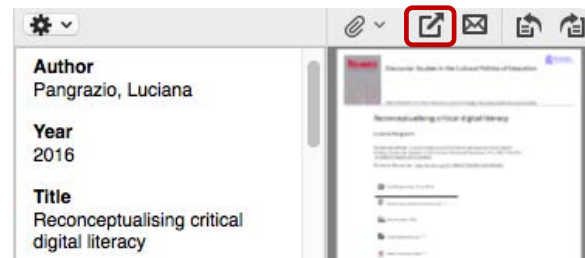
Click  to display annotation options:

- 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  to close



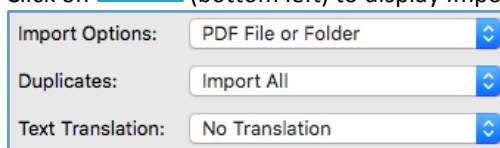
- It is possible to search within these attached PDFs
  - Select *Any Field + PDF with Notes* to search within references and PDFs and Notes added
  - Select *PDF* to search within the PDF attachments
  - Select *PDF Notes* to search within Notes added to the PDFs

## Exercise 11 Add a reference and PDF using the PDF IMPORT Filter

If you have pdf documents with a correctly formatted DOI on the first page, EndNote X8 can retrieve the bibliographic details from the crossref database and bring them into your EndNote Library thus creating references with the PDF attached.

**NOTE:** If bibliographic details are unable to be retrieved, only a title and the attached pdf will appear in the reference.

- Save pdfs to your computer e.g. save a pdf of a recent journal article to your desktop  
They can be organised into a folder of pdfs with subject specific sub folders
- Select **File > Import**
- Click on **Options** (bottom left) to display Import options



Select a PDF file or Folder(s) of files from the Documents window above

Click on **Import** (bottom right)

- To create a new Group Set with subject specific Groups of references below, named according to the folders accessed, select **Import Options:** **PDF Folder as a Group Set**



- Only 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 Organise references using Groups


Using Groups to organize your references is better than setting up separate libraries for each topic


To set up any one of the following:

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\_X8.enlx** include *Avian Intelligence*, *Bats*  
Select **Create Group Set**. Name the new Group Set

The contents of each group set 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

-  **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

-  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

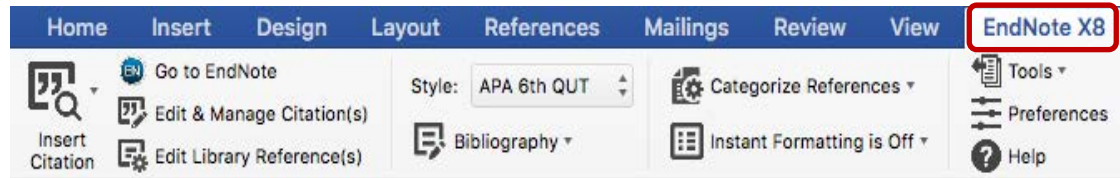
**NOTE:** References can be added to more than one Group  
References deleted from a Group still remain in your Library  
You can drag and drop groups to relocate them within the Groups panel



## ENDNOTE AND WORD WORKING TOGETHER

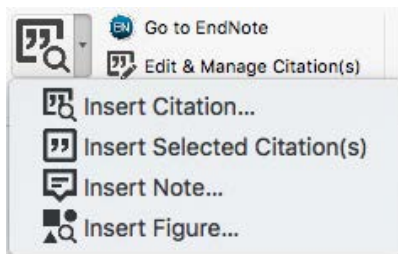
**HINT:** When EndNote X8 is installed:

Word Commands relating to Word's own Bibliography function disappear from the References tab of the ribbon. A new EndNote tab appears. The commands are organised into three groups: *Citations*, *Bibliography* and *Tools*



### Exercise 13 Insert a citation into text

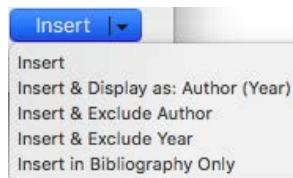
- Place the cursor where you wish to insert the citation(s)  
Select the relevant EndNote command




**NOTE:** If you are using AGLC3 style, use Word's Insert Footnote command to insert a footnote number before you insert the EndNote citation

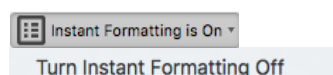
- Find and Insert citation(s)  
Click on ***Insert Citation*** > ***Insert Citation*** to search for the reference(s) you wish to insert  
e.g. enter first author and year, no 'and' needed

Click on ***Insert***  
Display options available



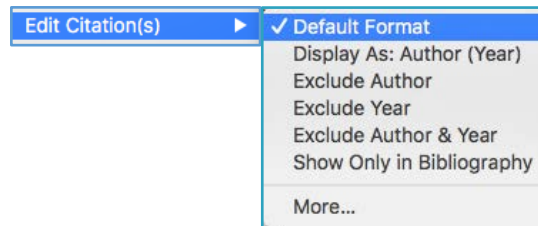
- Insert selected citation(s)  
In your EndNote Library, highlight the reference(s) that you wish to insert  
Select multiple references by holding down the Ctrl key
  - In EndNote: Click on 
  - OR In Word: Click on ***Insert Citation*** > ***Insert Selected Citation(s)***
- The in-text citation appears and a Bibliography is automatically generated at the end of your document

**HINT:** In the Bibliography commands is the option to turn instant formatting on or off



## Exercise 14 Edit and Manage Citations

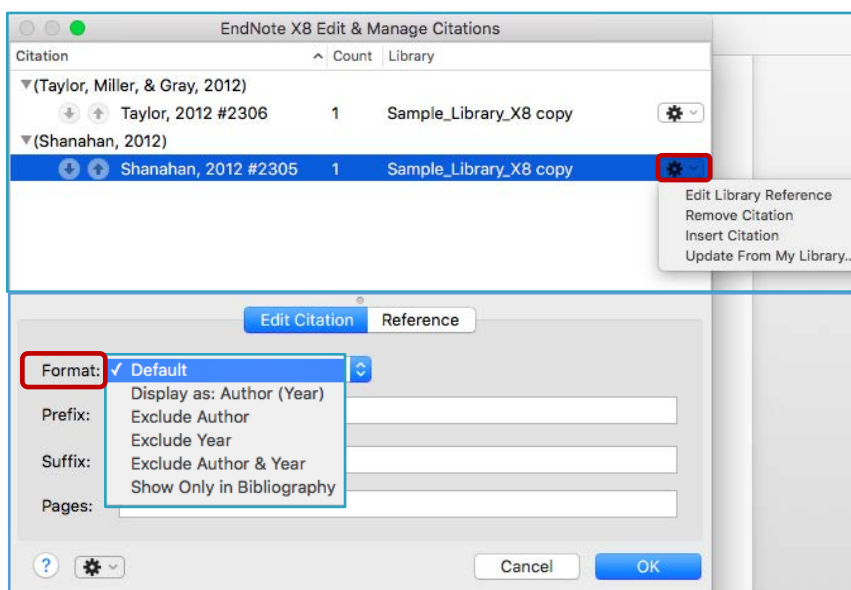
- In Word, highlight the in-text citation you wish to edit. Right click > **Edit Citation(s)**




Some quick options are available:

Select **Exclude Author** to omit authors' names from citations  
 Select **Exclude Year** to omit the year from citations

- Click on **More...** OR choose **Edit and Manage Citation(s)** from the EndNote tab to display the Edit & Manage Citations box



Click on the  drop-down menu and select:

**Edit Library Reference** to open the Reference within EndNote

**Remove Citation** to delete from your Word document

**Insert citation** opens the **Find & Insert My References** window to find additional references for multiple citations

- Use the **Format** drop-down menu to change the display of your in-text citation
- Use the **Pages** box to enter page numbers e.g. 67 - 71
- Use the **Prefix** box to add comments like *as cited in* (Include a space at the end of your text)
- If you are using AGLC3 style use the **Suffix** box to enter page numbers and other pinpoints

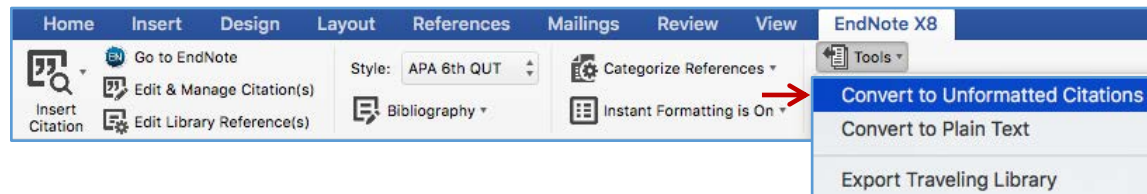
**HINT: ALWAYS** use the **Edit Citation(s)** command to make changes to in-text citations or to delete a citation. Just typing changes into the document risks corrupting the EndNote citations.

## Exercise 15 Un-formatting and re-formatting

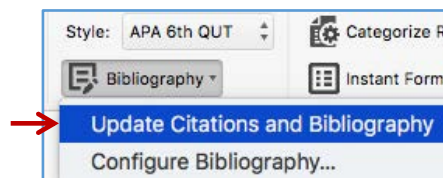
Cutting and pasting text containing formatted EndNote citations in large documents cannot be done safely without risk of document corruption

To move citations or text with citations safely:

- Select **Tools > Convert to Unformatted Citations**



- Make required moves
- Select **Bibliography > Update Citations and Bibliography** to re-format





## Exercise 16 Change the style of your citations and bibliography in Word

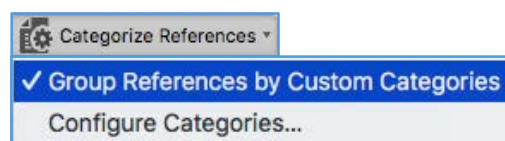
- Select a new style from the Style drop-down menu

**HINT:** If citations are unformatted e.g. {Blake, 2010 #11}, select a style then click on **Update Citations and Bibliography**.

## Exercise 17 Create subheadings in your bibliography in Word

It is possible to create subheadings in the bibliography according to predefined categories.

- Set up the required categories
  - Select **Categorize References > Configure Categories**
  - Assign category headings. The default is Primary Sources, Secondary Sources  
Use the  button to type new headings  
Click on  next to a heading to delete
  - Assign each citation to a category  
Select *All References in Bibliography* to display all  
Drag and drop each reference into the desired category
- Re-format the bibliography to display subheadings
  - Select **Categorize References > Group References by Custom categories**  
Click again to turn off and revert back to a standard bibliography



Any references not assigned to a category will be listed at the end as Uncategorized References

## Exercise 18 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. In your word document, **Paste**


## Exercise 19 Backup 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 (network drive), to USB

**HINT:** Don't backup to a cloud service e.g. Dropbox as this will eventually lead to library corruption because of the way the cloud services synchronize files over the internet

- Select **File > Compressed Library** to compress the Library (.enl file) and its attached files 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
    - Default = **All References in Library**  
Options = *Selected Reference(s); All References in Group/Group Set*
    - 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   
A User manual loads onto your Mac: Finder > Applications > EndNote X8 > EndNote.pdf
  - QUT Library EndNote Help  
<https://www.library.qut.edu.au/research/toolkit/referencing/endnote/>
    - **Installation options**
    - **Training and support**  
EndNote Essentials workshops: Access the QUT EndNote exercises and powerpoint  
Online training, videos, guides, FAQs
    - **Customise your EndNote** Output styles, journal term lists
  - EndNote website online Help  
<http://endnote.com/support>
  - Online Endnote demonstrations via YouTube  
<https://www.youtube.com/user/EndNoteTraining>
  - University of Queensland EndNote Help  
<https://web.library.uq.edu.au/research-tools-techniques/referencing/referencing-software/endnote/using-endnote>
  - EndNote news and tips on Twitter  
<https://twitter.com/EndNoteNews>
  - Google! Many problems and solutions can be found by searching on Google
- Congratulations! You have mastered EndNote Essentials**