Introduction to EndNote 20 for Mac

THE UNIVERSITY OF WAIKATO
Te Whare Wānanga o Waikato
LIBRARY
Te Whare Pukapuka

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Extra support and tutorials are available from:

EndNote website
http://www.endnote.com/   (click on 'Training' on top right of page)

EndNote's Youtube channel
https://www.youtube.com/user/EndNoteTraining

Liaison Librarians October 2021   1

1. Introduction: What is EndNote?

EndNote is bibliographic (or referencing) software used to format citations (references) downloaded from databases, Library Search, Google Scholar, or created manually. EndNote can create bibliographies (reference lists) in many different referencing styles. An EndNote library can contain up to 100,000 references.

The software allows you to:
- Attach PDFs of articles to citations (manually or using the 'find full-text' feature)
- Arrange citations in groups
- Insert in-text citations into Word and create a list of references automatically
- Sync your library between EndNote desktop and EndNote Web (you can only sync one library)
- Share an EndNote library with other EndNote users (you share only one EndNote library)
- Put your EndNote library on a portable hard drive and use it with multiple computers
- Use the File>Compressed Library command to make backups of your library

Important! Please note:
- Most records downloaded into EndNote need editing
- It is advisable to have only **one** library and use groups
- It is advisable to back up your EndNote library to EndNote online or your University of Waikato Home(H)s drive
- **Webpages:** To capture website information you must either create a manual entry, or use the 'Capture' function to extract reference information from certain webpages, into either EndNote Web or EndNote Desktop. With the 'Capture' function, before beginning, you need to create an EndNote account at www.myendnoteweb.com, click on 'Downloads' and install the Capture Reference tool

2. EndNote & Safari, Cloud Storage: OneDrive, DropBox, iCloud etc
- The **Safari** browser is NOT compatible with EndNote, instead, use Chrome or Firefox
- Do **NOT** store working EndNote libraries in cloud-syncing folders such as **OneDrive**, **Drop Box, iCloud**, etc., or keep read-write EndNote libraries on network drives or flash drives is as it **can corrupt EndNote libraries**
- Make sure your EndNote Library is NOT in a folder that is being synced by OneDrive. Help here
- If you want all your references available on all your computers, online, and on your iPad, use one EndNote library and sync it to EndNote online (ask your librarian how to do this)

Tutorials and Videos from EndNote http://clarivate.libguides.com/endnote_training
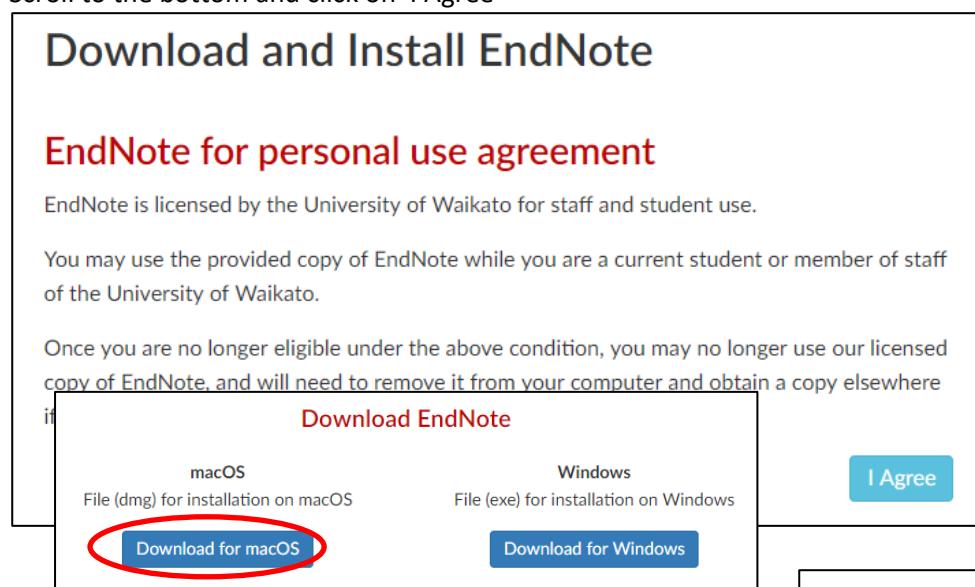
3. Download EndNote 20

EndNote is installed on most University computers and the University has a site license so that EndNote software is free for students and staff to use on their personal computers.

If EndNote is NOT on your University computer, or you need an upgrade or help to download it on your personal computer, contact the ITS Service Desk (07) 838 4008 or email help@waikato.ac.nz.
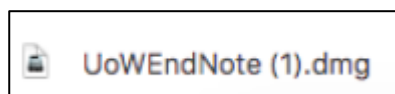
To download EndNote on your own computer go to
https://www.waikato.ac.nz/library/study/guides/endnote/endnote-download

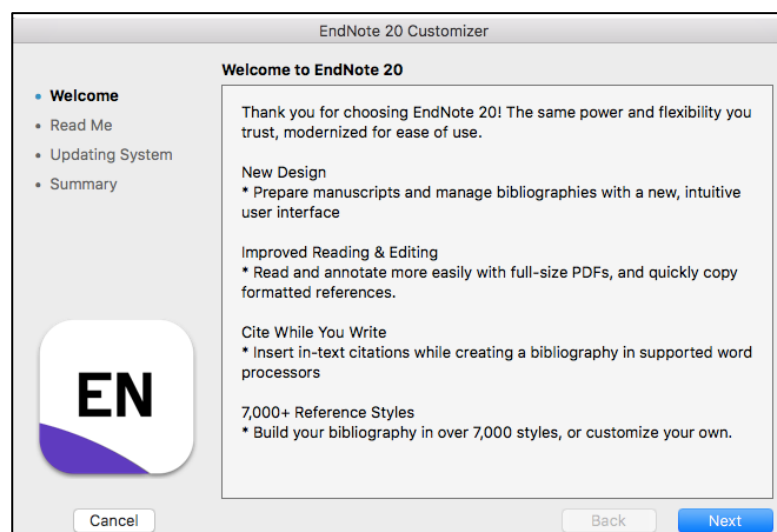Scroll to the bottom and click on 'I Agree'
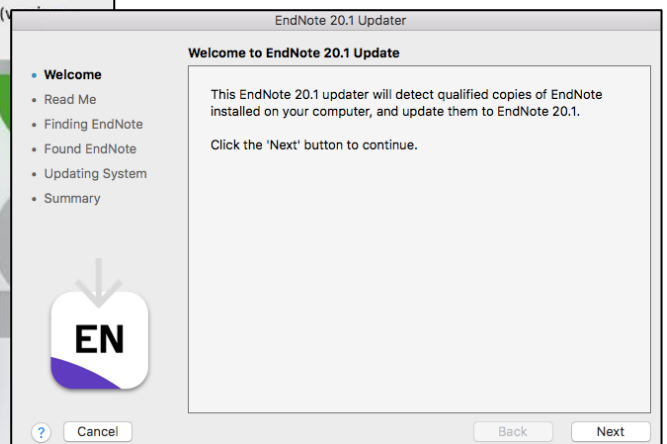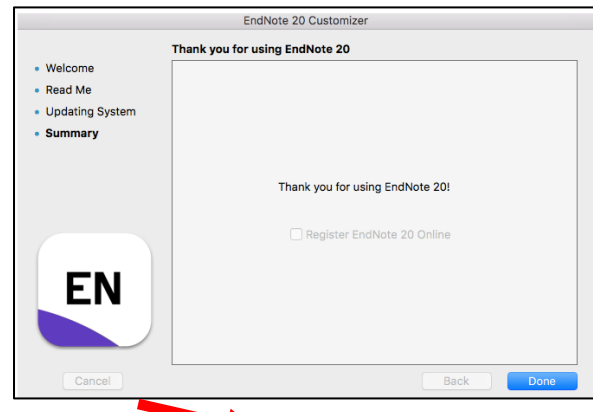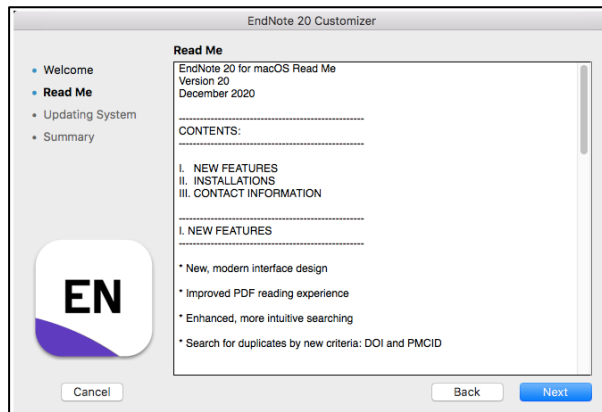

Click on 'Download for macOS'

The EndNote installer file will appear as a download, once it has downloaded, click on it to open it.

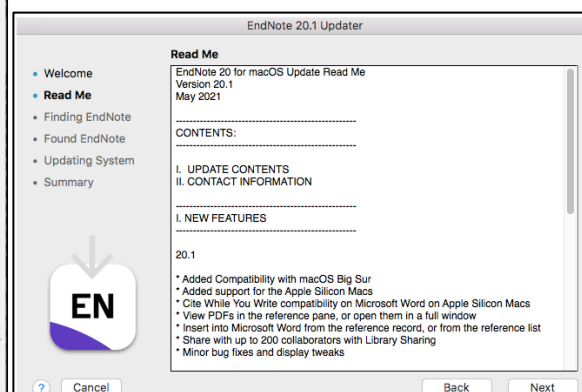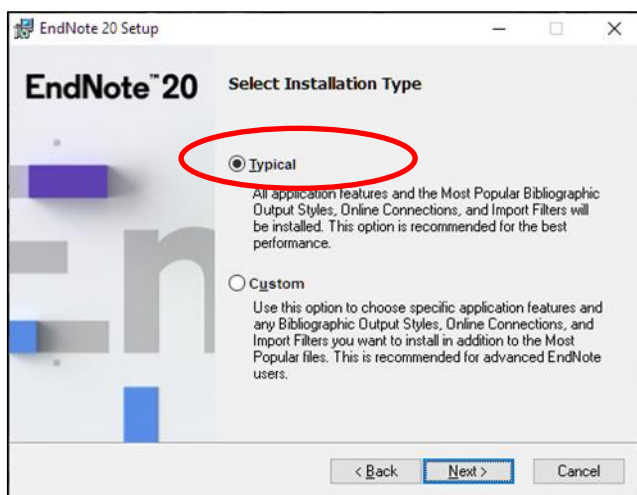Click 'Install' to continue with the set up process.

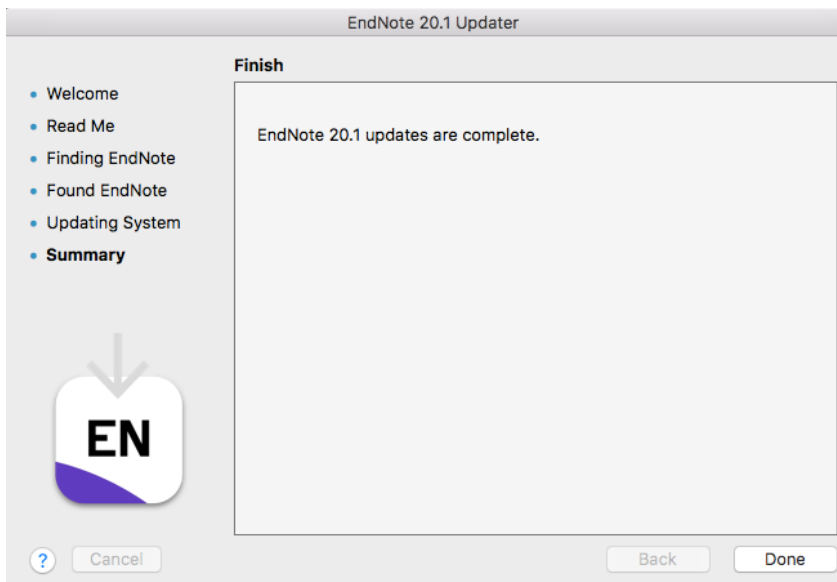Click 'Next' to confirm you have permission to install the software

The following images will guide you through setting up EndNote. Click 'next' until you get to 'finish'.
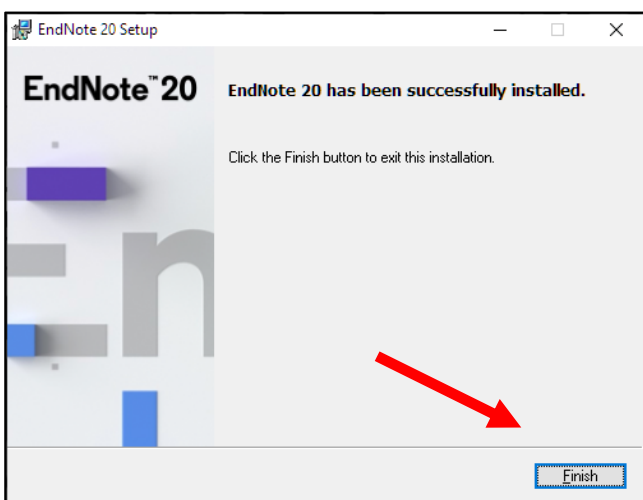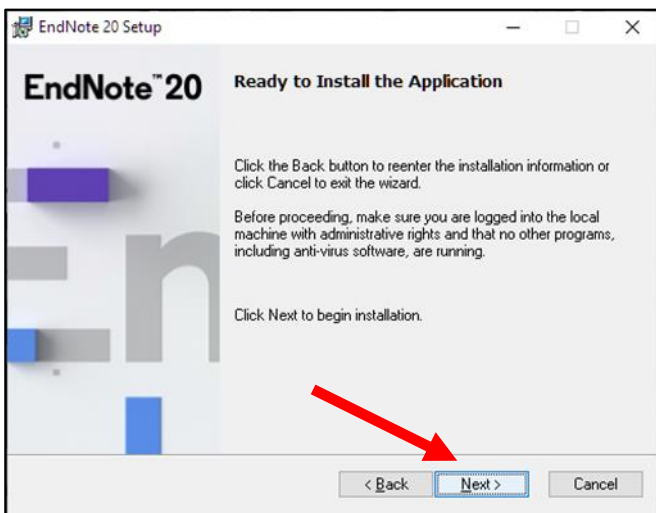

Choose the 'typical' installation type

If a window appears asking if you want to allow EndNote to make changes to your device select **'Yes'**

If prompted, complete the 'set up your account' process, which includes creating an online EndNote account at www.myendnoteweb.com as this enables you to sync your library to the cloud which provides a backup copy of your library. **If you already have an EndNote web account, you do not need to do this.**

You are now ready to use EndNote 20 on your computer.

4. Open a new EndNote Library

4.1 If you have just installed EndNote, the program will be open. If yes, go to 4.2
If not, click on 'Finder', search for EndNote 20, and click on the 'EndNote 20' application to open it.

Drag the application to the task bar so it is easy to access in future.

4.2 Once the EndNote program is open you need to open a library. If a library is already open go to 4.3. If not , click File > New to open a new EndNote Library.
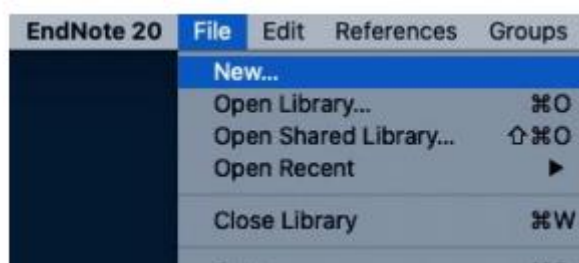

5. Saving your EndNote Library

DO NOT save your EndNote library to your desktop, or to downloads. This can result in you working on multiple copies of your EndNote library which is undesirable.

To save this EndNote Library to your computer, from EndNote click on File > Save and navigate to your documents, and then create a folder called 'EndNote'.

Your newly created EndNote library is empty.   See next page for an overview of the interface.
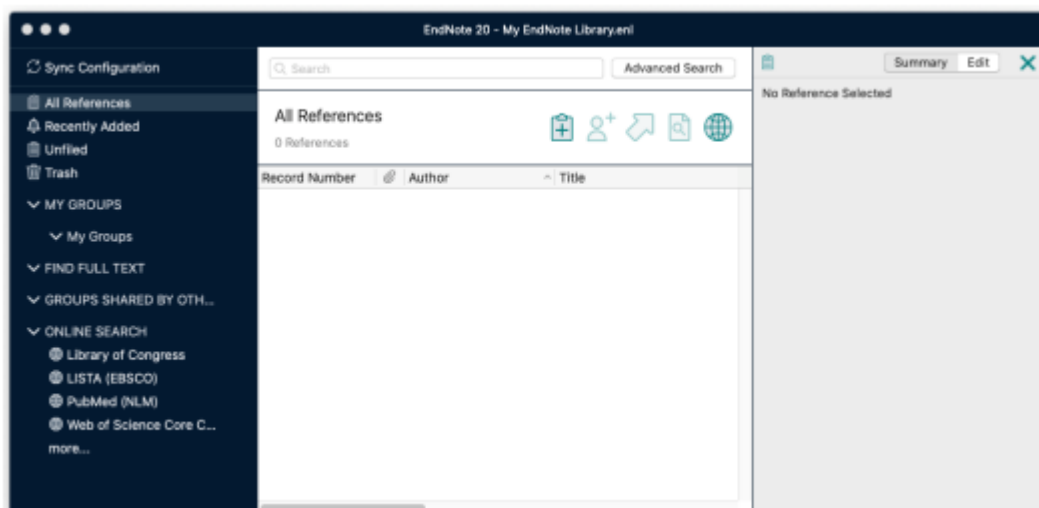
6. Endnote Interface

Toggle between 'summary' and 'edit' to view or edit citation information.

Create a new manual entry

Attach & view attached PDFs

Organise your library with groups

Set the referencing style

Items in your library

This previews the citation in the chosen reference style. Check for accuracy, and click on 'edit' to correct fields as required.

7. Add journal article citations to your library using Library Search

Web Browsers: It is advisable to use Chrome or Firefox as Safari and EndNote can have issues.

(Get more detailed records for journal articles by clicking through to the database from Library Search. Look for 'export' or 'download citation' then choose EndNote or RIS format).
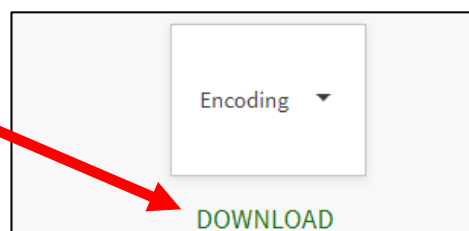
Navigate to the University of Waikato Library, find the article 'The state of accounting education scholarship in New Zealand', and click on the ellipsis (…) to the right of the title

Search for the article
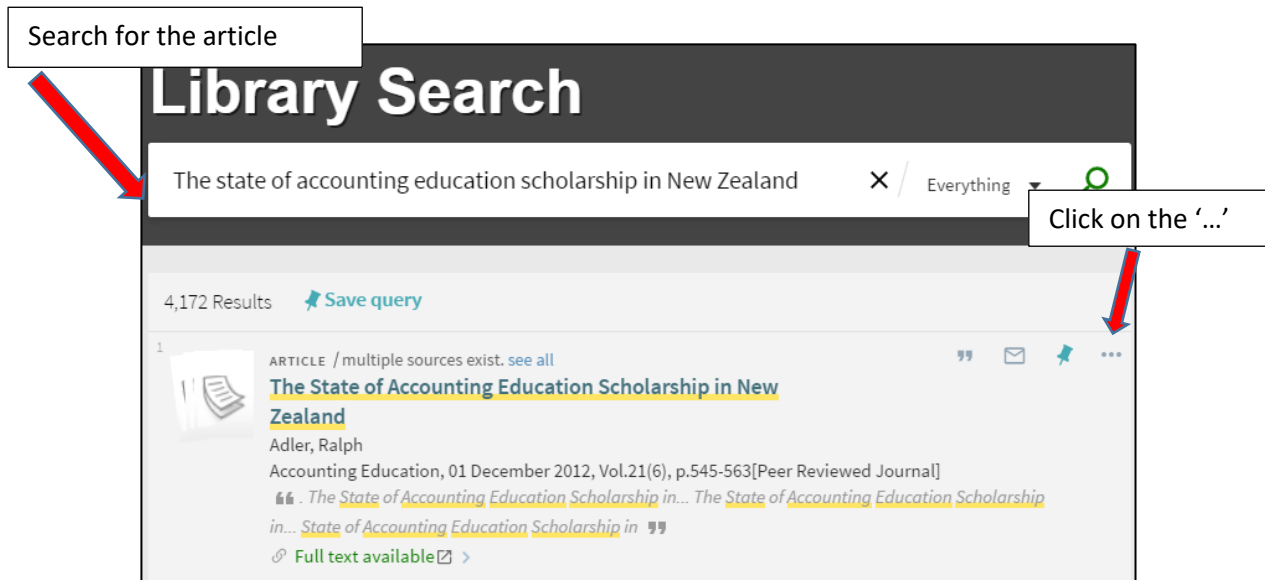
Click on the '…'

Click on 'export RIS'

Click on 'download'

Click on the downloaded RIS file on the bottom left of the screen 'Primo_RIS_Export.ris'

The citation will now show in the 'imported references' in your EndNote Library (see below).

Check the preview displays correctly in your reference style (APA in this instance). For this entry, the title, journal and publisher fields need editing.

Editing a record

Highlight the reference you want to edit. In the right hand pane, the summary will be displayed. If the right hand panel doesn't display double click the reference. Once the panel displays click on the Edit button

Make changes to the record and click the 'save' button.
Use the 'tab' key to move easily through each field.

For tips on editing records see section 9.1 Record Tidying Tips.

8. Adding references manually

If you can't download an RIS or enw file, the information must be entered manually.

- Click 'Ctrl + N' **or** References > New Reference to open up a blank record
- Select the relevant resource type (it defaults to 'journal article') and complete the required fields (you can tab between fields)
- Save the entry by closing the record window (X in top left of the record window)
- For a website, add (copy or type) the relevant information to Author. Year. Title and URL fields (the web address e.g. https://www.govt.nz

You may need to enter a reference manually. Websites are best done this way. Click the 'New Reference' button. This will open a window with spaces to enter the reference details
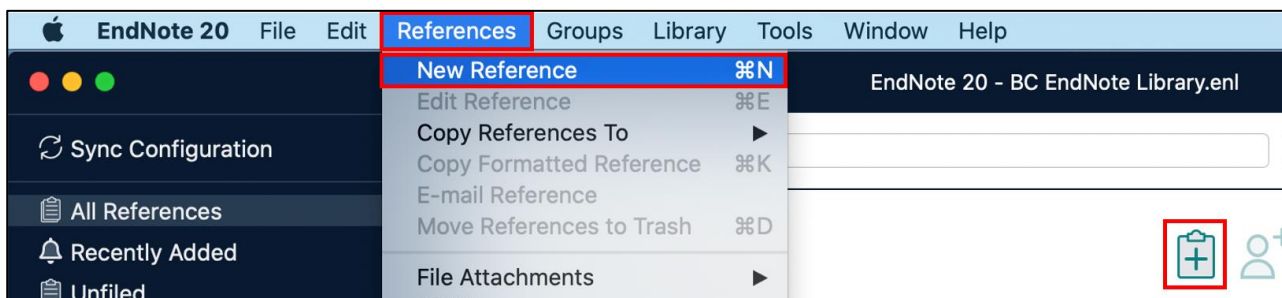
2. Choose the relevant **Reference Type** e.g. Journal article. Fill in enough fields to generate an accurate citation (i.e. author, date, title, publication details).
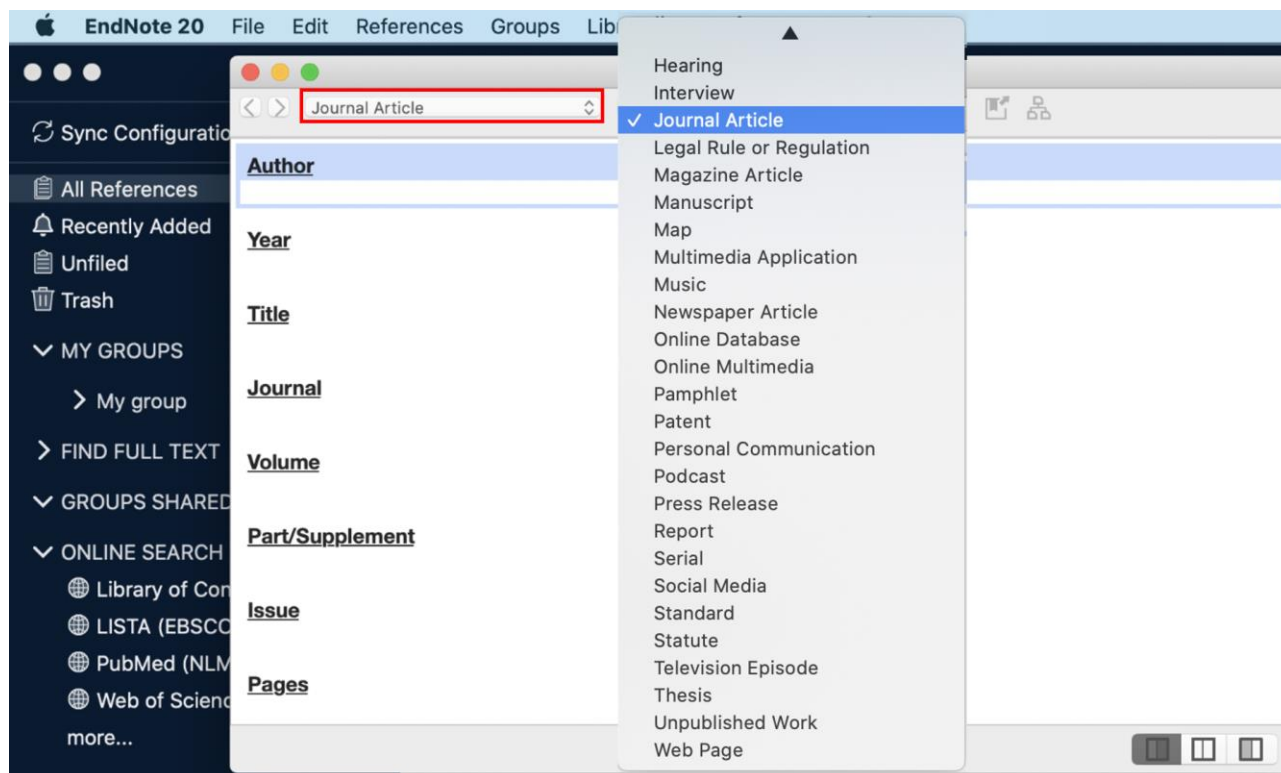
9. Add edited book citations to your library using Library Search

For edited books you must reference individual chapters within that book. The imported record will show the book editors as authors, which is **not** correct.
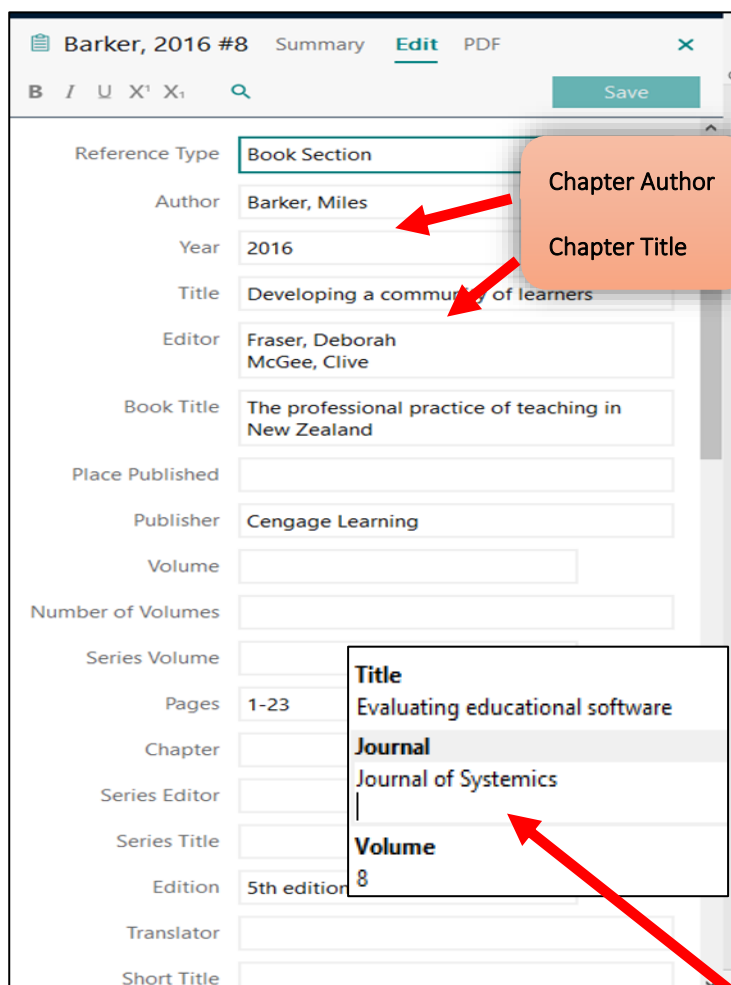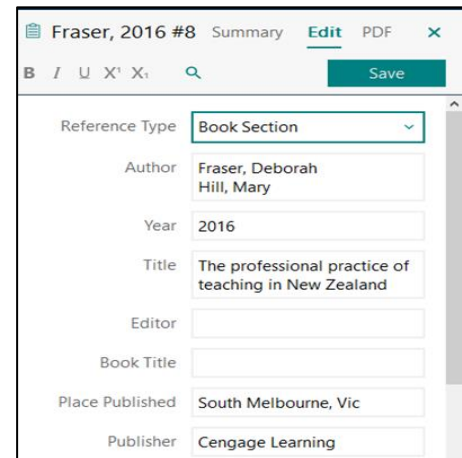
For the citation to display correctly use **'book section'** as the item type.

You will need to edit the fields accordingly:

- author (of chapter)
- year
- title (of chapter)
- editor/s of book
- book title
- add the page numbers (for the chapter)
- add edition

Repeat this for every chapter you use from the book.

9.1 Record tidying tips:

- Correct upper & lower case for titles
- Always use a capital letter after a colon (:)
- Omit punctuation from the end of all fields except for corporate author
- Omit 'vol.', 'p.', 'pp.' or ed. in the volume, pages, editor and edition fields.

Author Names:

- Family name, First Name
- One author name per line
- Write each author's name consistently e.g. so their publications appear together in your library and subsequently reduce duplication.

Wang, John R. OR Wang, J. R
Smith, Anne M. OR Smith, A. M

Corporate author
Ministry of Education,

Remove unwanted gaps in a citation preview by deleting spaces after the entry – e.g. there may be an invisible space or return after the entry.

10. Add citations from Google Scholar https://scholar.google.co.nz/

Firstly, change the settings in Scholar to export citations to EndNote

Google Scholar > Settings > Bibliography manager > Show link to import citations into EndNote
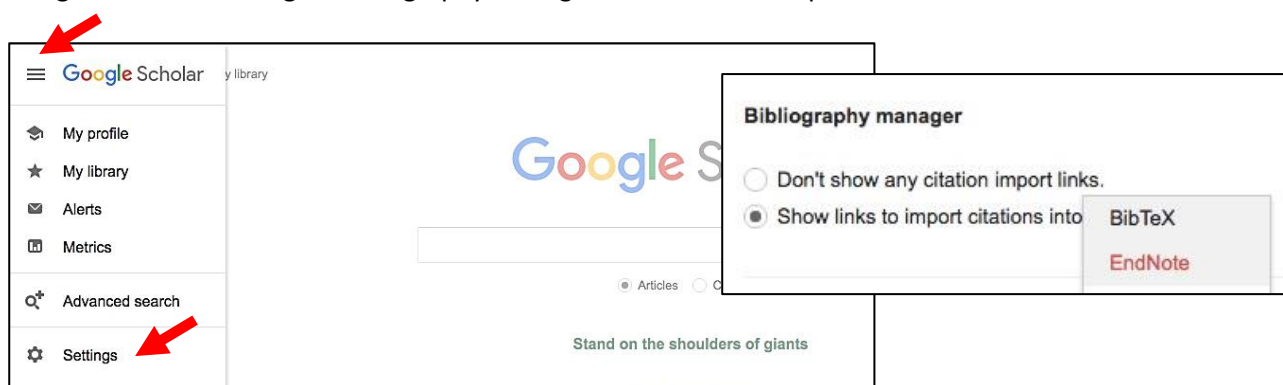
Search for an item in Google Scholar. From your search results, click on 'Import into EndNote'. If you are using Chrome the download will appear at the bottom left of your screen as a scholar.enw file. Click on it to send the citation to your EndNote library.
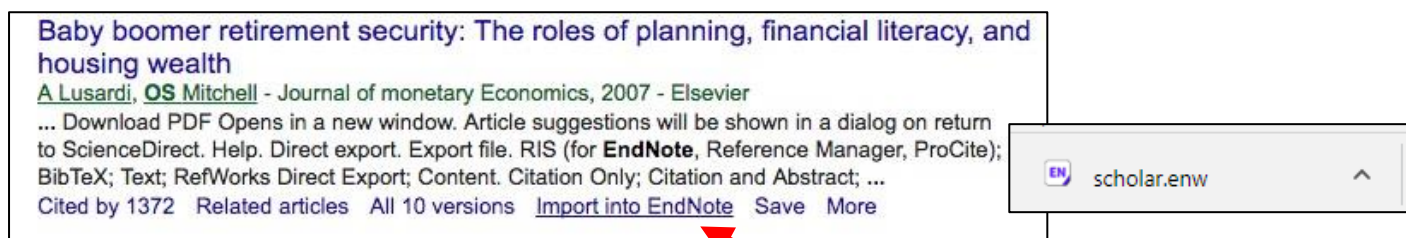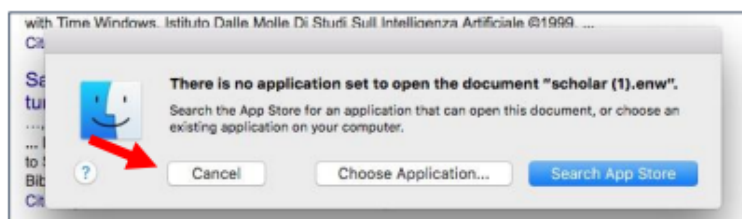

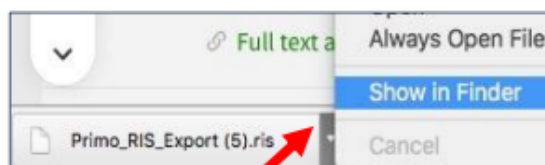# 11. Troubleshooting when downloads don't automatically go to EndNote

If you get a message saying there is no application set to open your RIS or enw file, **you need to tell your computer to always open it with EndNote**.
Option A:

Click on cancel to close this pop up

Click arrow to right of downloaded file, select 'show in finder'

Right click on the file and click 'get info'
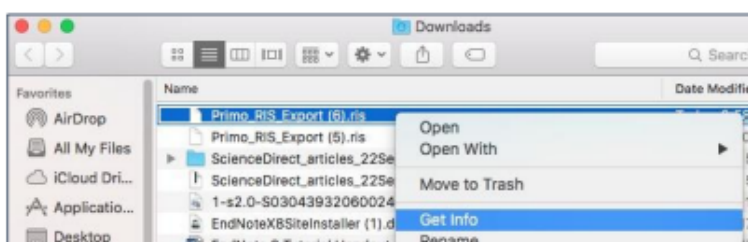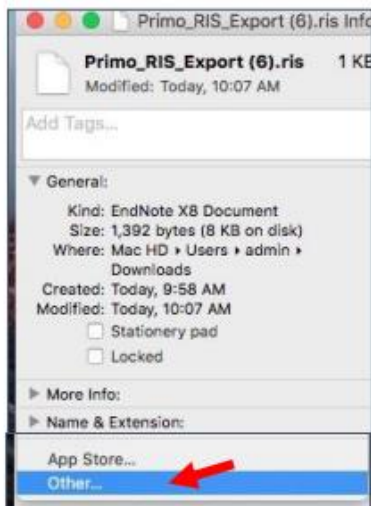
Under 'open with' click on the arrows, choose 'other' and navigate to the EndNote application in your Applications folder.

Select EndNote, click always open with, and click add.
The window will close.
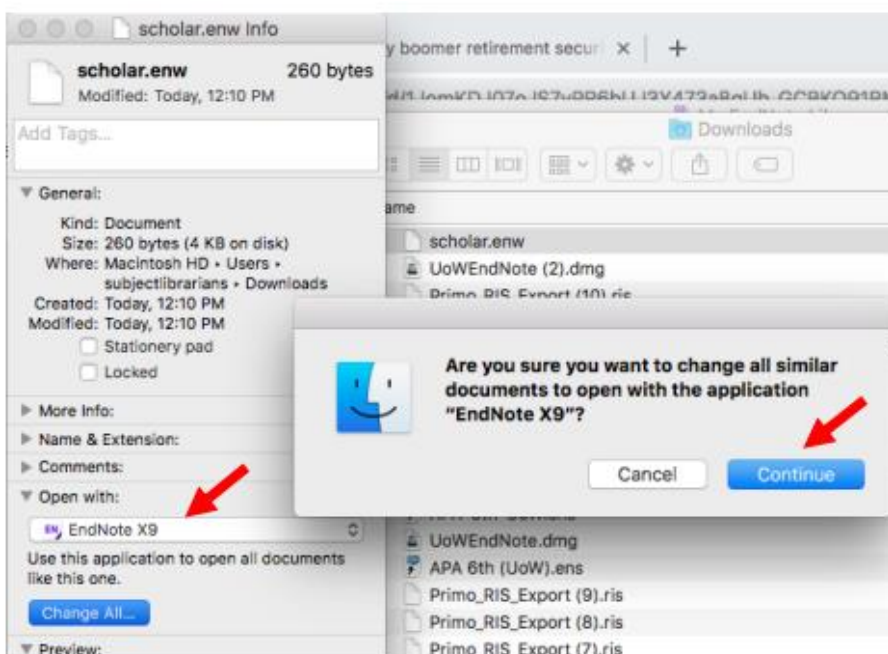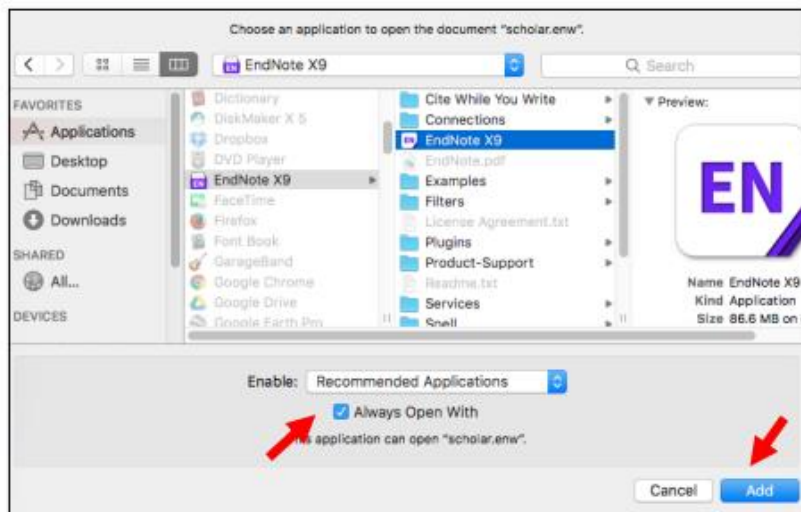
Lastly, click 'change all' and click 'continue'. This will ensure that downloaded files will always open with EndNote.

Option B

Select EndNote if it is showing.

OR

If the EndNote app does not appear, select '**more apps**' and navigate to the EndNote programme in your computer.

IN EITHER CASE

Tick 'Always use this app to open .enw files'

12. Capture citations from webpages

If you don't use website information often, it may be best to create manual entries (see Section 8).

You can use the *Capture* function to extract reference information from certain webpages, into either EndNote Web or EndNote Desktop. Before beginning, you need to create an EndNote Web account at www.myendnoteweb.com, click on 'Downloads' and install the 'Capture Reference' tool to your web browser.
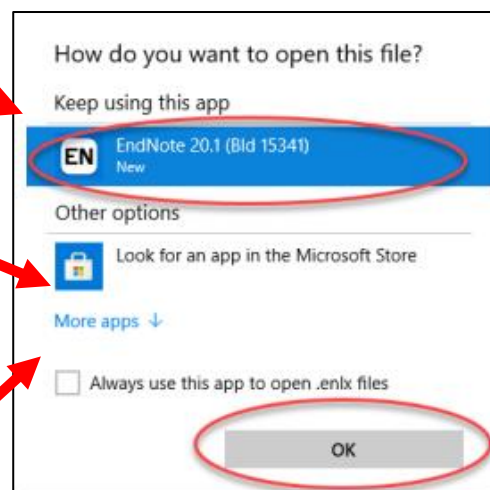
13. Export citations from a Waikato Reading List to EndNote

You can export entire lists of citations or individual items from a Waikato Reading List.

To export all, go to the relevant Reading List, click on view & export > export > RIS. An RIS file should automatically download. Click on it to send all the reading list citations to your EndNote Library.
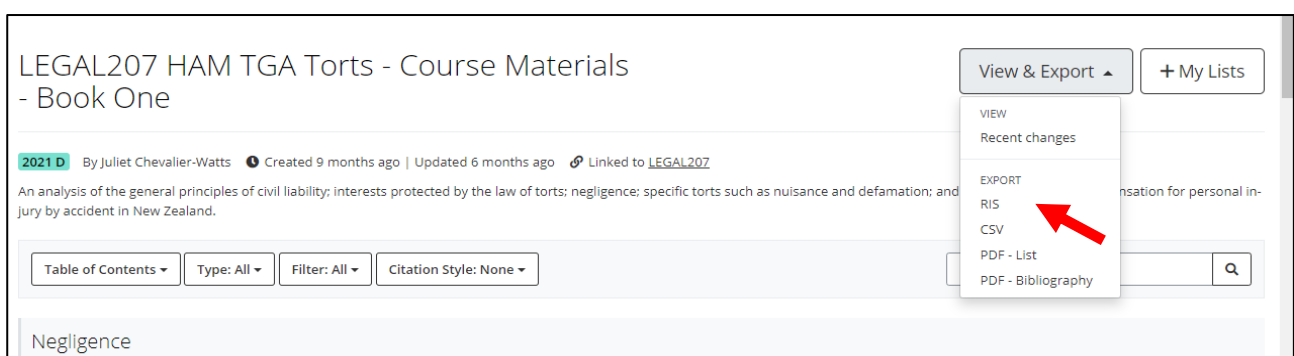
To export individual items, click on the desired title in the reading list > View actions menu> Download RIS.
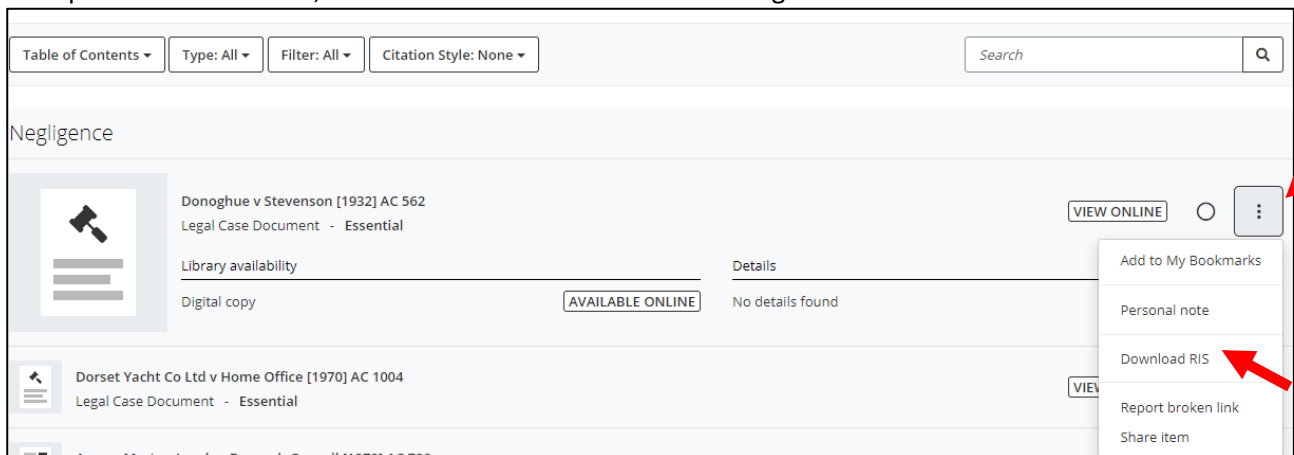
14. Attach PDFs to your EndNote Library

- Add PDFs to individual citations in your EndNote library
- Add PDFS individually or in groups **without** an associated citation in EndNote
- Use the **Find Full Text** feature

14.1 Attach a PDF to an individual citation

1. Ensure you have the PDF downloaded to your computer, and you know the location, then highlight the relevant citation, click on the **Attach File button** at the top of the Summary view of the reference, navigate to the PDF. Save the record.
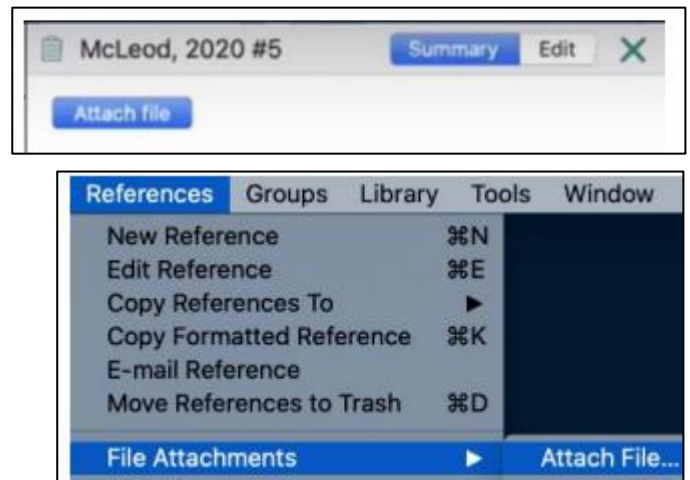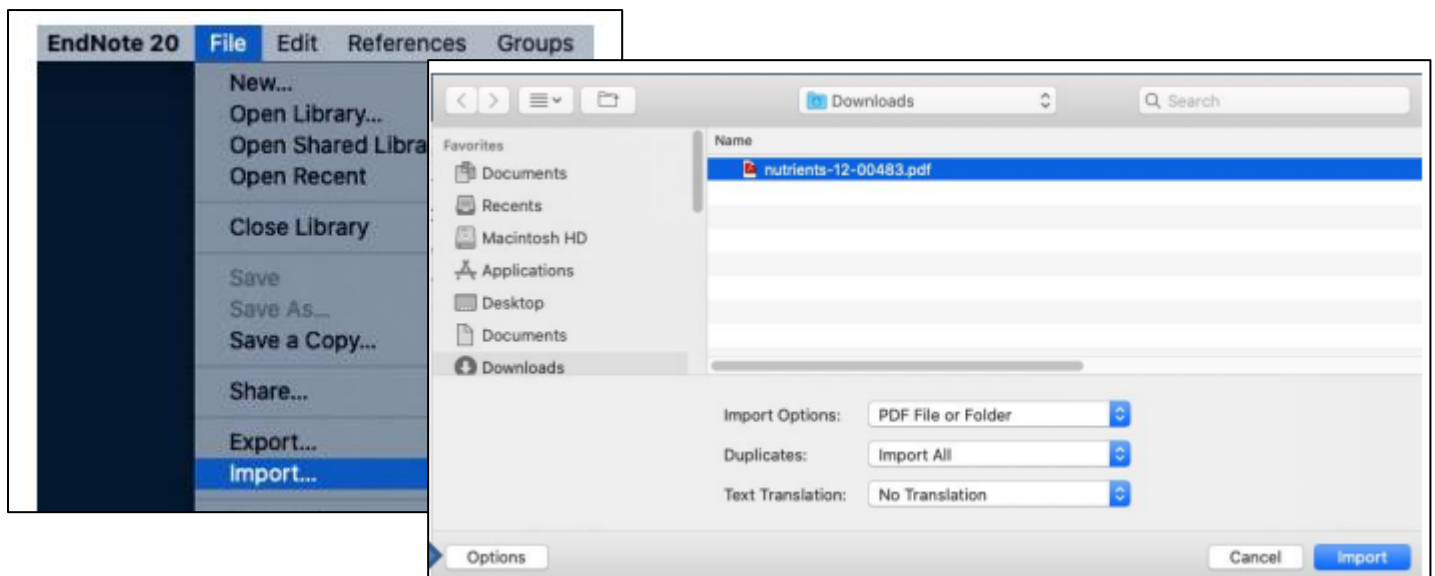
2. Select relevant citation in EndNote, click on **References** > **File attachments** > **Attach file.** Navigate to the relevant PDF.

A paperclip icon appears to the left of the reference to show a PDF is attached.

14.2 Upload individual or groups of PDFs when no record exists

Click on **File** > **Import** and navigate to your PDF. In the **Import Options** drop down menu, choose PDF.

If the PDF has a DOI, EndNote will *sometimes* import the PDF **and** the citation details as shown below.

If EndNote can't find the associated information, the entry will appear in <Angle Brackets> and you will need to manually add the details.

14.3 Find Full Text Feature

Right click on one or more citations and click 'Find Full Text'.

Success rates vary depending on the age of the citation, whether the record contains a DOI, and whether the PDF is behind a subscription paywall.

You can improve Find Full Text results – add URLS (below) and 'Find Reference Updates' (Section 14.4)

Add these URLs in EndNote:

Go to Edit>>Preferences>>Find full text

1. Under the **Open URL** Path add this URL: http://resolve.library.waikato.ac.nz/
2. Under the **Authenticate with** add this URL: http://ezproxy.waikato.ac.nz/login?url=
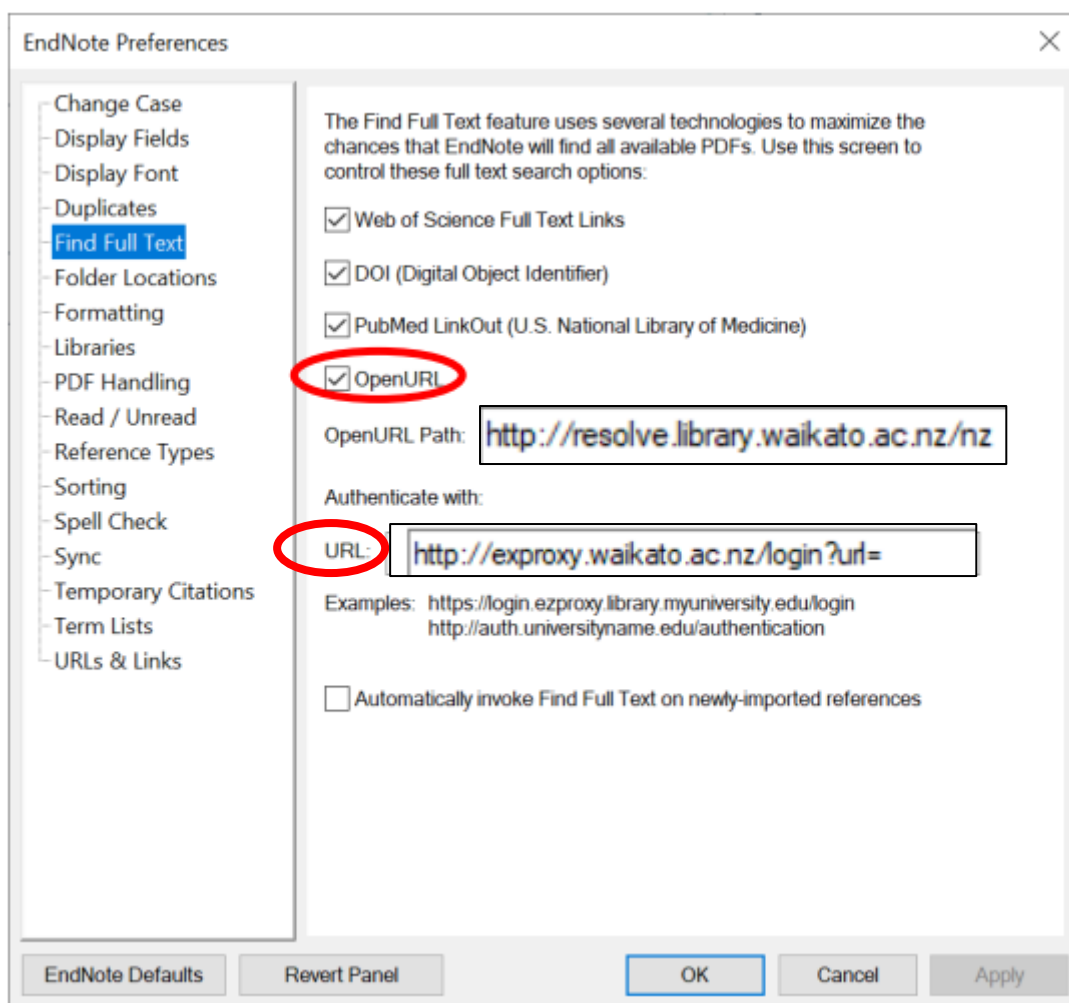

14.4 Find Reference Updates

Right click on a citation and click 'Find Reference Updates' EndNote searches for updates to selected references. This can help make the 'Find Full Text' feature more successful. If updates are found, for each reference you can choose to update all fields OR update just the empty fields.

15. Working with EndNote and Word

Open a Word document. Ensure the EndNote toolbar is showing and that the correct referencing style is selected (click arrow next to style and '**Select Another Style**' if necessary). Make sure 'instant formatting' is **on.**
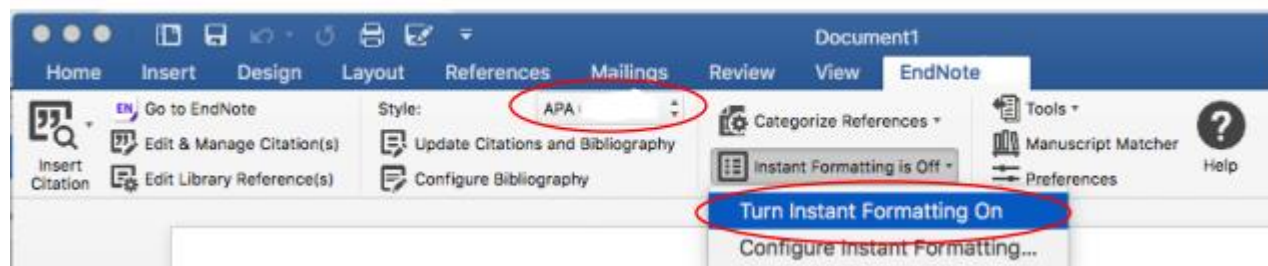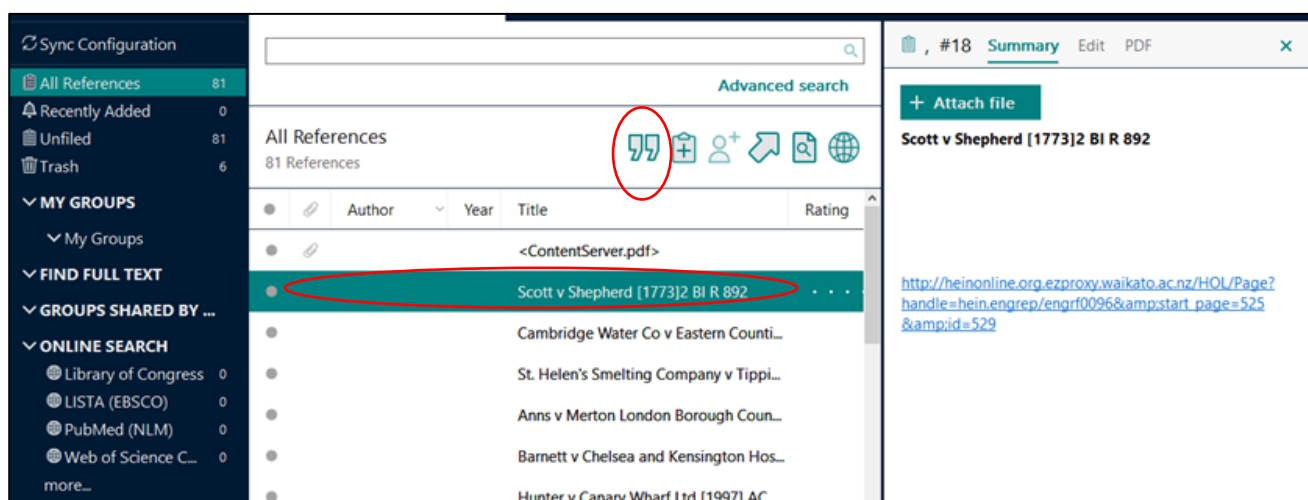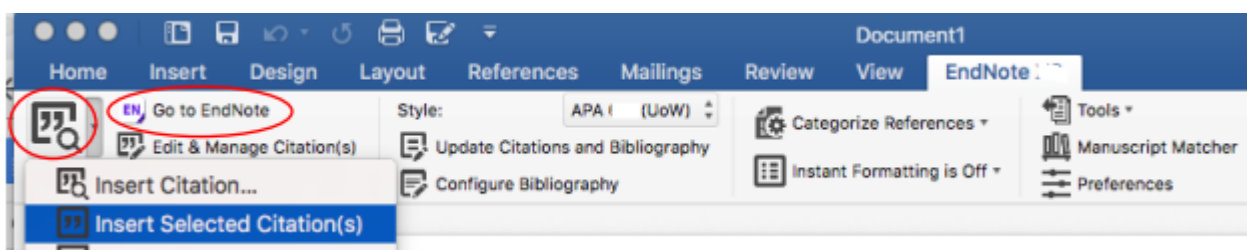

15.1 Insert Citation

There are several ways to insert citations – choose the way that best suits you.

Option a: Go to EndNote:
1. From your word document, click on the 'go to EndNote' icon in the EndNote toolbar
2. Select the relevant citation(s) from your EndNote library
3. Click on the quotation mark icon in EndNote, which will return you to you word document and insert the citation.

Option b: Insert Selected:
1. From your EndNote Library select the relevant citation/s
2. In Word click the drop down arrow next to the magnifying glass on the EndNote toolbar and from the drop down menu select **Insert Selected Citation(s)**
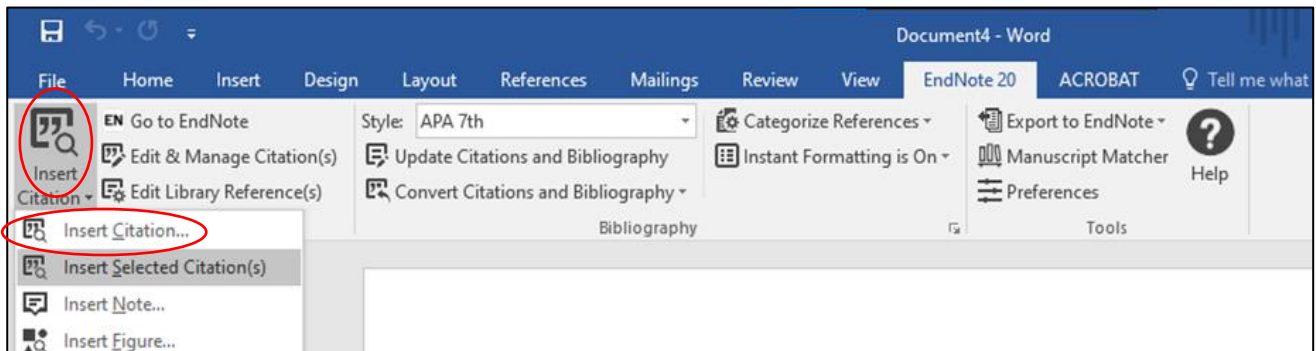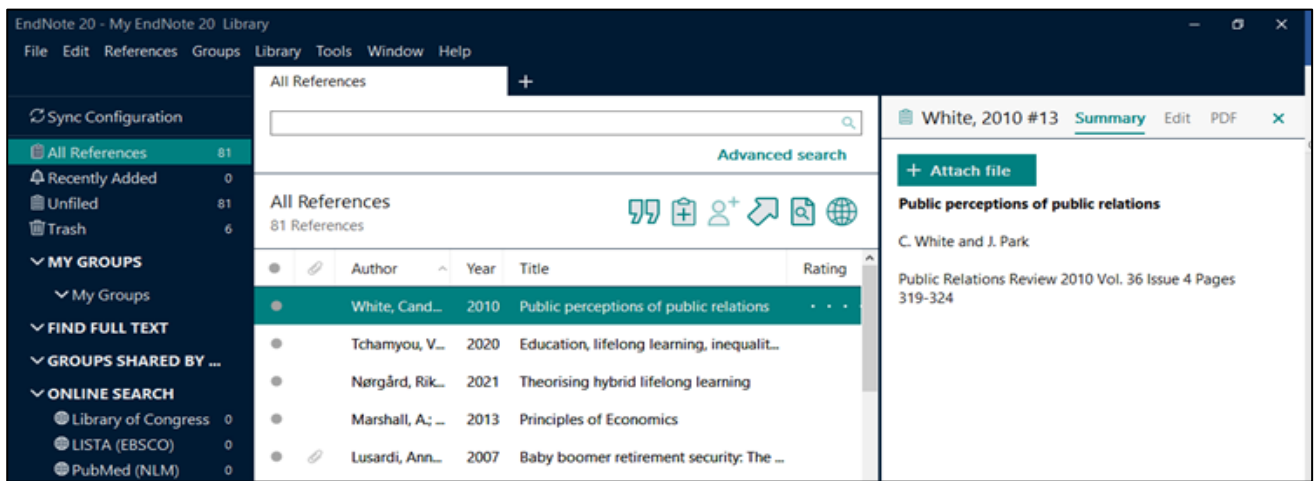
Option c: By Searching:

1. From the EndNote toolbar in Word, click on the magnifying glass icon
2. Search for your citation, either by title or author
3. Click the citation you want and click **insert**
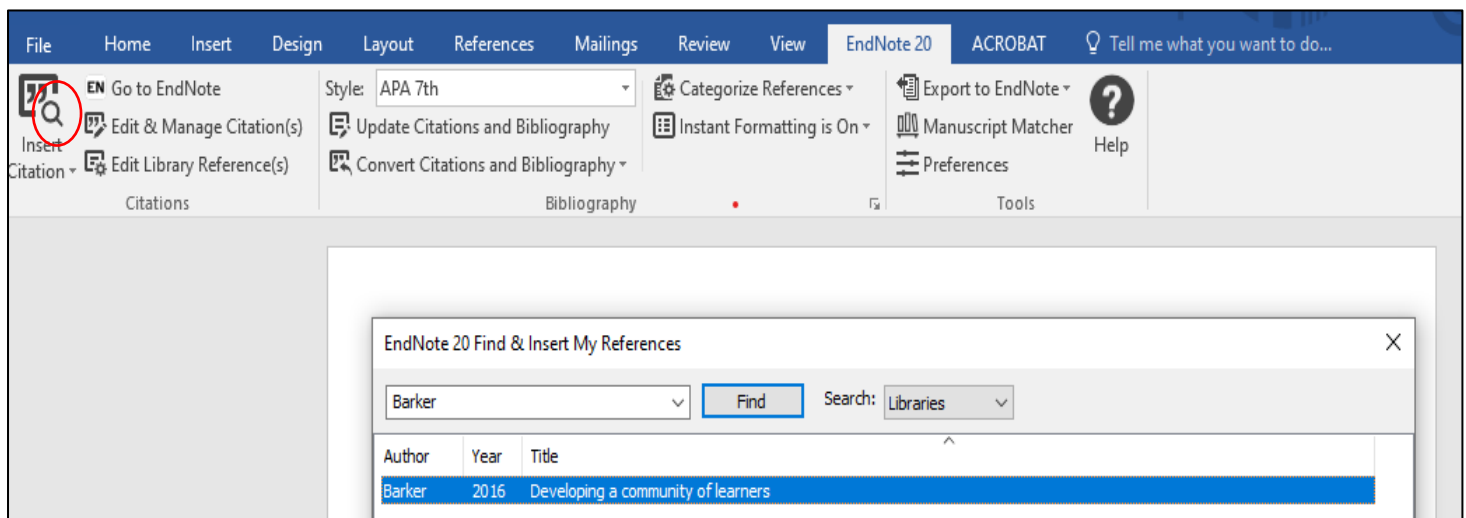
15.2 Edit and Manage Citations
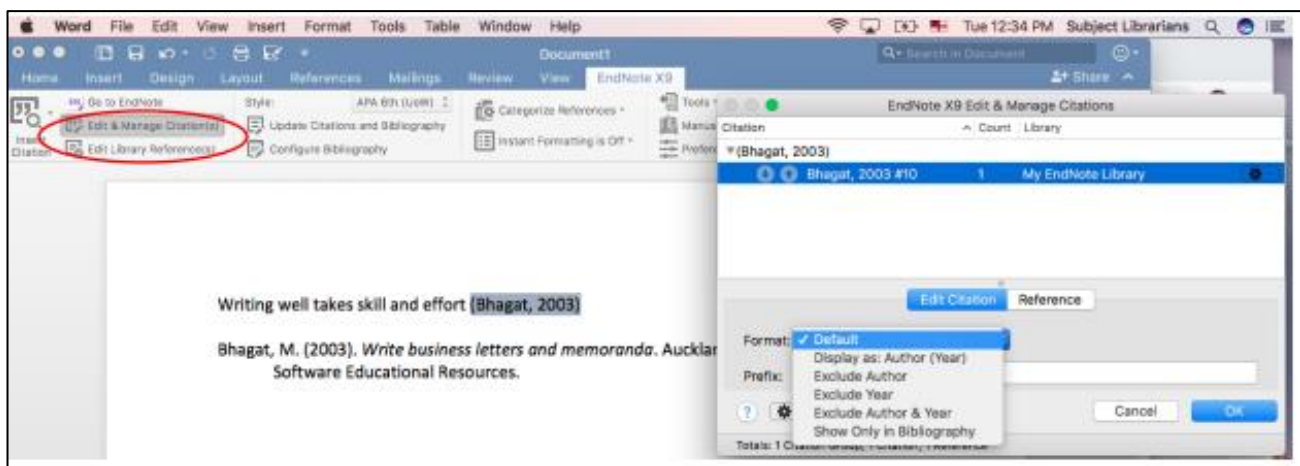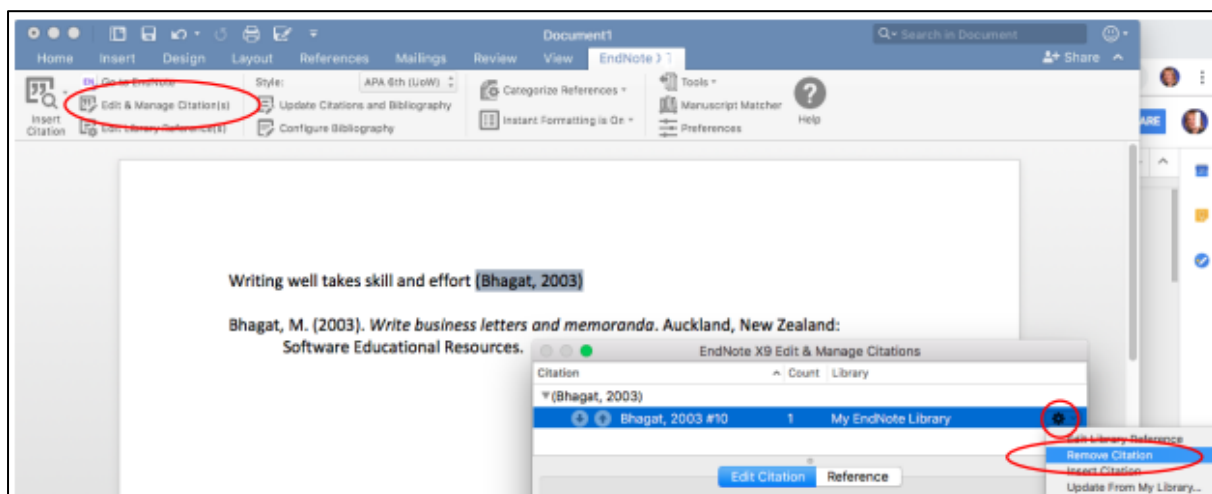
1. Click **Edit and Manage Citation(s)**.
2. You can add page numbers, or prefix information like 'as cited in' to your in text citations

15.3 Remove citation

Items added with EndNote must be removed with EndNote. To remove: Click on the in-text citation to be removed, click **Edit & Manage Citation**, click **Edit reference** dropdown, click **Remove Citation**

15.4 Edit your bibliography / reference list

If EndNote created your reference list, you **must** use it to change title, font, line spacing, and indentation
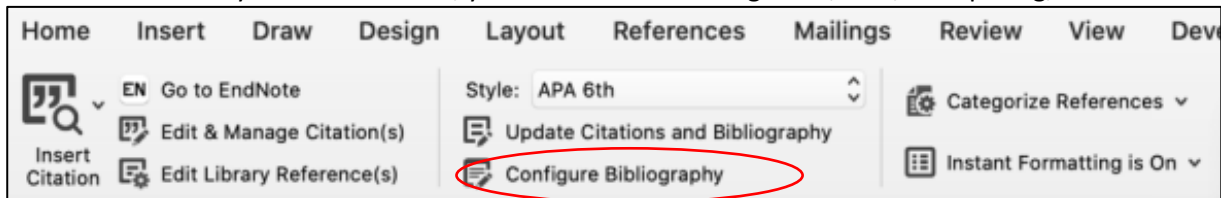
From your word document:

1. Click on the EndNote toolbar
2. Click on the arrow on the lower right corner of the **Bibliography** group
3. Select **Layout**
4. Select formatting as required (font size, font type, line spacing)

16. Referencing Styles

16.1 How to choose a different referencing (output) style.

1. **In EndNote,** in the right pane, click on **summary**
2. In the **style pane** at the bottom left of the summary, click on the arrows to the right of the style
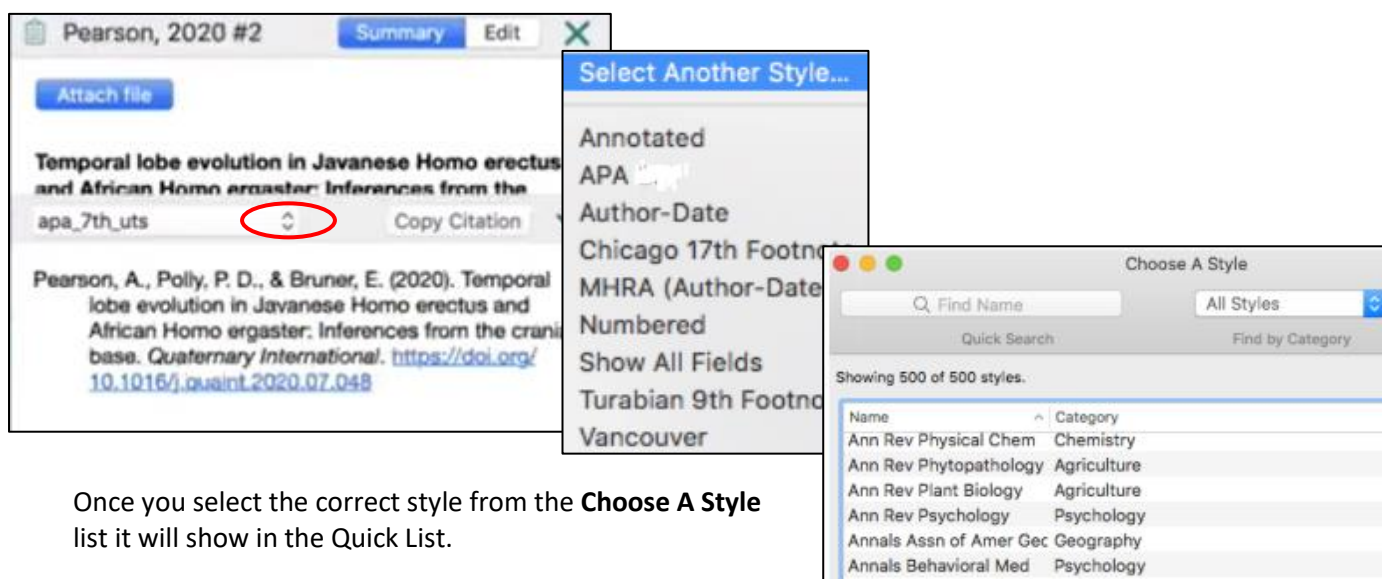3. Choose from the Quick List, OR click on **Select Another Style** and navigate to the correct one.

Once you select the correct style from the **Choose A Style** list it will show in the Quick List.

16.2 How to download a University of Waikato EndNote style

Library staff have created or adapted styles for APA7, MHRA, Harvard Science, Harvard Geography, Law, Anthropology and Politics. These adapted styles are NOT automatically loaded into the EndNote program.

1. Make sure the EndNote program is open.
2. Visit the 'Styles' section of the below address
   https://www.waikato.ac.nz/library/study/guides/endnote/styles
3. Click on the relevant style. Once it is downloaded, click on the file to open it.
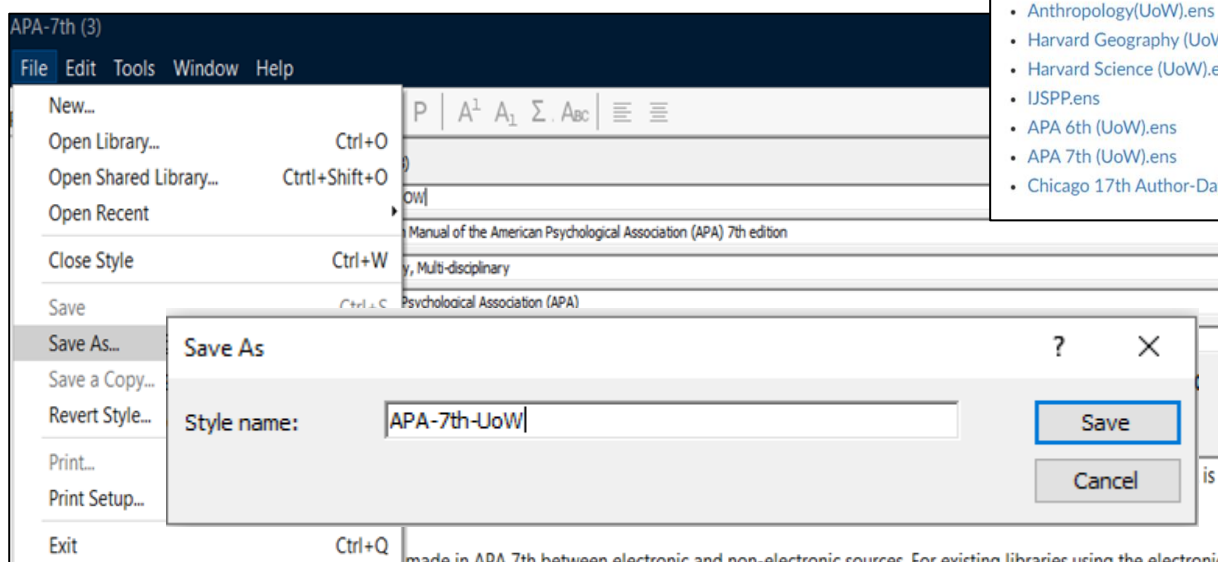
4. Once the style is open (as shown above) click **File** and **Save As** from the EndNote menu, remove 'copy' from the Style name if it appears, and click **Save**.

5. To close the style click the small X in the upper right of the screen.

6. Repeat step **16.1** to select this style. This style is now available on your computer, and will be available as a style to select when you start using EndNote with Word.

17. Backing up and disconnecting

17.1 Saving your library as a backup

It is essential to save your EndNote library as insurance in case your working library becomes corrupt, or the device containing your library is stolen or becomes corrupt.

• Save a copies in 3 locations (HEAR on your computer, NEAR on a USB, FAR in EndNote Cloud or email)
• Backing up weekly is recommended
• Do not use your backups as your working library

When an EndNote library is created, two files are produced. One has an .enl file extension eg. My Thesis Library.enl and the other is a folder with the same name but ending in .DATA eg. My Thesis Library.DATA. These files must remain together for your library to fully function.

To back up the Library you have to compress them into one file with a .enlx extension.

1. From your EndNote library, click **File** and choose **Compressed Library (.enlx)**…

2. Choose **Create** > **with file attachments**
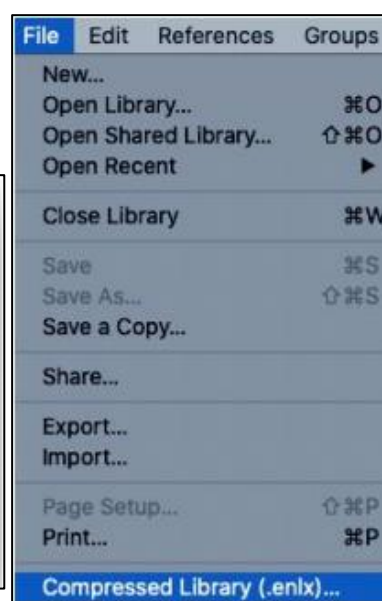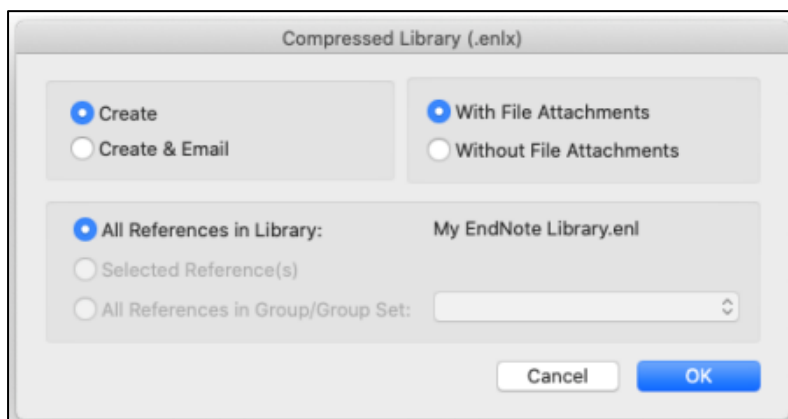
3. Choose a location to save your library (create an EndNote backups folder).
4. Add the word 'back up' and the date to your compressed library
5. If you should ever need to open the file, double click on it on any computer with EndNote installed.

DO NOT BACK UP YOUR ENDNOTE LIBRARY TO USB OR DESKTOP
• **USB** is ok for file transfer but not permanent back up
• **Desktop**. If your computer fails, there is little chance to retrieve what was on your desktop

CLOUD STORAGE: Examples: iCloud, Dropbox, OneDrive, Google Drive,
• Do not work on your EndNote library from a cloud storage drive. Issues such as corrupted libraries can occur.
• Use cloud storage to save a **back up** copy of your library (not your active EndNote library)
 • To work on your EndNote library from cloud storage, first download it or copy it to your local device. You can then work on it. When finished, add the saved version back to your cloud storage.

17.2 Disconnecting your document from EndNote

If you want to share your document with others who may want to edit it or use track changes, it is best to create a **plain text** copy which breaks the link between your Word document and the EndNote software.

1. From the EndNote toolbar in your Word document, click on **Tools**
2. Click **Convert to Plain Text.**
3. A pop up box will advise that this command will create a new copy of your Word document and removal all EndNote markers, and your original file will remain open and untouched. Click **'OK'.**
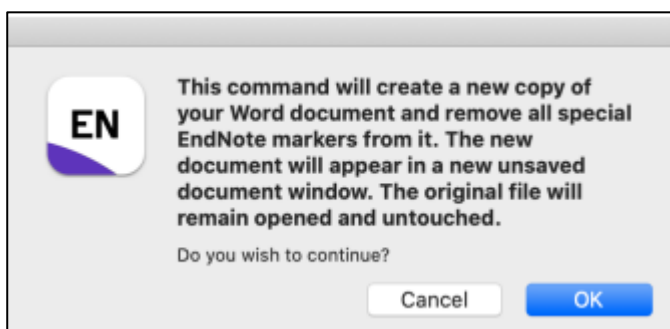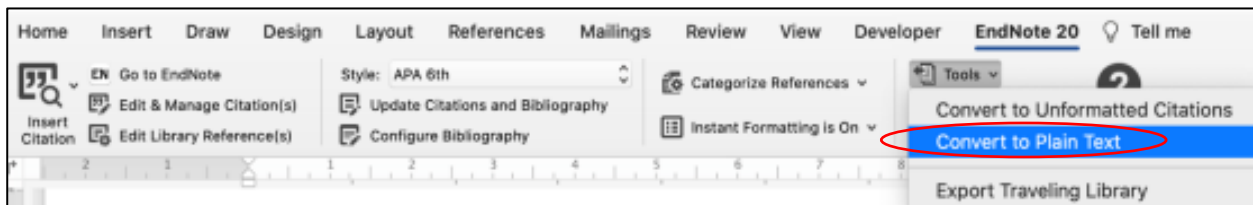
4. Save the new un-named document and add 'Plain Text' to the title. This document is not connected to EndNote, and cannot be reconnected. Your original EndNote connected document remains unchanged.