

# EndNote 20: Getting Started (Mac)

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# Mac Versions X9.3.2 and above

- From late 2019, Apple no longer supported 32 bit software and EndNote Mac changed to a 64 bit program. This means libraries created in Mac version X9.3.2 and above are no longer compatible with earlier Mac versions or Word versions X9.3.2 or earlier.
- If you upgrade to Mac version X9.3.2 or above, you can **only open libraries created in this version or above or on Windows version X9.3.3 and above**.
- If you are using the Catalina OS or above, you **must** upgrade to this version.
- You can open libraries created in older versions in the newest version. They will be converted to the newest format. Once converted however, the libraries will no longer open in earlier versions. This process can not be reversed. Always create backups of your libraries before upgrading.
- Libraries from different versions can be shared using EndNote Online. Information about this
  is available on our website <a href="https://web.library.uq.edu.au/research-tools-techniques/referencing-software/endnote/using-endnote/syncing-and-sharing-your-endnote-library">https://web.library.uq.edu.au/research-toolstechniques/referencing-software/endnote/using-endnote/syncing-and-sharing-yourendnote-library</a>

#### Upgrading to New Versions:

- It is not always necessary to upgrade to latest version. In most cases, the previous version will be fine to use.
- If upgrading, always create a **backup** of your libraries first.
- When to upgrade to a new version:-
  - > You are two or three versions behind the most recent one.
  - > There have been significant improvements with the new version.
  - > You have been having issues with an older version.
  - > You have upgraded your device.
  - Your current version is no longer compatible with updated versions of Microsoft Word or your operating system.

#### **Checking For Updates:**

1. In EndNote, click on the EndNote 20 option in the top, left corner of the screen.

É EndNote 20 File Edit References Groups Library Tools Window Help

- 2. Click on the Check for updates option.
- 3. Follow on the on screen prompts.

#### **BACKING UP YOUR LIBRARY:**

- Save 3 copies in 3 locations
- Backing up weekly is recommended.
- Do not use your backups as your working library.
- Using the **Compressed Library** option in EndNote is recommended for creating backups.



# **Creating A Compressed 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.

#### Note: This option will not work for libraries that are 4GB or larger.

- 1. In EndNote, have your library open.
- 2. Click on **File > Compressed Library**.

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Co	mpress	ed Library (.e	nlx)

3. A Compressed Library window will open. Click on OK.

Compressed Li	brary (.enlx)
<ul> <li>Create</li> <li>Create &amp; Email</li> </ul>	• With File Attachments • Without File Attachments
• All References in Library: • Selected Reference(s)	My EndNote Library.enl
O All References in Group/Group Set:	\$
	Cancel OK

- 4. Give your compressed library a name. For a backup, we recommend adding "Backup" and the date to the name eg. BACKUP My Thesis Library 3May2021. Click on **Save**.
- 5. The file will now be saved. Add to your backup locations.
- 6. To open the file, double click on it on any computer with EndNote installed.



# Recommended:

- Post graduates have access to the UQ server which is backed up every day with a 30 day archive
- Internet based email account
  - Quarantine it from your online shopping, Facebook, banking etc.
  - Computer hard drive
    - DO NOT BACK UP YOUR ENDNOTE TO THE FOLLOWING
      - USB (USB is ok for file transfer)
      - The computer desktop
        - If something goes wrong with your computer, there is very little chance to retrieve what was on your desktop
- Frequency of back up if at the discretion of the user, but it is recommended at least once a week

#### File Naming for your EndNote library:

- Make it descriptive but not too long or you may get an error message eventually
- No spaces in the file name. Use under scores or hyphen if you want to separate words or even capitalize the first word.
- Include the date in the filename when backing up, using the YY\_MM\_DD format. This lets you know the last time you backed up your library and also helps when sorting files.

# **CLOUD STORAGE:**

#### Examples: iCloud, Dropbox, OneDrive, Google Drive, UQRDM

- **Do not work on your EndNote library from a cloud storage drive**. Issues such as corrupted libraries can occur.
- Only use cloud storage to save a back up copy of your library. Never you 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.

#### **CREATING A NEW ENDNOTE LIBRARY:**

1. Click on File > New



EndNote 20	File	Edit	References	Groups
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	Co	mpress	ed Library (.e	nlx)

- 2. Choose where you want your library saved and give it a name. Click on **Save**.
- 3. You will now have a blank library.

•••	EndNote 20 - M	ly EndNote Library.enl	
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<ul> <li>▲ References</li> <li>▲ Recently Added</li> <li>圖 Unfiled</li> <li>⑩ Trash</li> </ul>	All References 0 References Record Number	Ĥ 2 <sup>+</sup> √ Q ⊕	No Reference Selected
✓ MY GROUPS ✓ My Groups ✓ FIND FULL TEXT	Record Number (© Addroi	~) Hue	
<ul> <li>✓ GROUPS SHARED BY OTH</li> <li>✓ ONLINE SEARCH</li> </ul>			
<ul> <li>B Library of Congress</li> <li>LISTA (EBSCO)</li> <li>PubMed (NLM)</li> <li>Web of Science Core C</li> </ul>			
more			

# A library is where you store your references. You are able to create as many libraries as you wish.

# ADDING REFERENCES TO YOUR LIBRARY:

Direct Export:

- Direct export is where you can add references to your EndNote library by exporting them from a search tool eg. database, UQ Library Search, Google Scholar
- Different search tools handle exporting to EndNote in slightly different ways. Two of the most commons methods are:-
  - Clicking on an icon (often a folder) to add required references to a folder. You then go to the folder to export the references.



- Clicking a check box then clicking on an **Export** (or similar) link to send the references to EndNote.
- On a Mac, Firefox, Google Chrome or Microsoft Edge web browsers are recommended. **Do** not use Safari.

#### **Exporting From UQ Library Search:**

Make sure you are logged into the UQ Library Search.

Log in to access full text, more search results and more services. Refresh this page if you are logged in but still see this message 🗄 Log in 🛛 🗙 DISMISS

# Single Reference:

1. With the reference you wish to export, click on the **Save, email, cite, export record** button (three horizontal dots) that appear on the right of the record.



2. A number of options will then appear. Click on **Export RIS** then click on the **Download** button.

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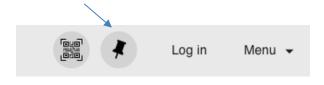
#### **Multiple References:**

1. From the results of your search in the UQ Library Search, select the references you want to export into EndNote. To select a reference, click on the pin icon that appears on the right of each record so it appears as crossed out.



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					CREATE CHANGE
BOOK Watching YouTube : Extraordinary Videos by Ordinary People / Michael Strangelove. Strangelove, Michael, author. 2020 & Available online ☑ >	1	77		*	
BOOK Influencer marketing for brands : what YouTube and Instagram can teach you about the future of digital advertising / Aron Levin. Levin. Aron (Marketing specialist), author. 2020	Ť	77		*	
	Watching YouTube : Extraordinary Videos by Ordinary People /         Michael Strangelove.         Strangelove, Michael, author.         2020 <ul> <li>Available online □ &gt;</li> </ul> BOOK         Influencer marketing for brands : what YouTube and Instagram can teach you about the future of digital advertising / Aron Levin.         Levin, Aron (Marketing specialist), author.         2020	Watching YouTube : Extraordinary Videos by Ordinary People /         Michael Strangelove.         Strangelove, Michael, author.         2020	Watching YouTube : Extraordinary Videos by Ordinary People /         Michael Strangelove.         Strangelove, Michael, author.         2020         Influencer marketing for brands : what YouTube and Instagram can teach you about the future of digital advertising / Aron Levin.         Levin, Aron (Marketing specialist), author.         2020	Watching YouTube : Extraordinary Videos by Ordinary People /         Michael Strangelove.         Strangelove, Michael, author.         2020	Watching YouTube : Extraordinary Videos by Ordinary People / Michael Strangelove. Strangelove, Michael, author. 2020 Available online Sook Influencer marketing for brands : what YouTube and Instagram can teach you about the future of digital advertising / Aron Levin, Levin, Aron (Marketing specialist), author. 2020

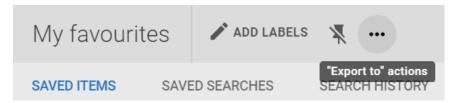
2. The references will be added to **My Favourites**. Once all the references you want are selected, click on the **My Favourites** pin icon at the top right corner of the screen.



3. You will then be taken to the **Saved Items** area of your account which will list your selected items. Choose the ones you wish to export to EndNote by checking them.

SAVED ITEMS	SAVED SEARCHES	SEARCH HISTORY
— 13 items		
A second		for brands : what YouTube and Instagram can uture of digital advertising / Aron Levin. cialist), author.

4. Click on the "Export to" actions icon (three horizontal dots) towards the top of the screen.



5. Click on the **Export RIS** icon. Click on the **Download** button that appears.

THE UNIVERSITY



My favourites	s ADD	LABELS		
	EXPORT RIS	ENDNOTE WEB	BIBTEX	E-MAIL
			UTF-8 🔻	
			DOWNLOAD	

6. Chrome, Firefox and Microsoft Edge each handle the direct export differently.

# Chrome:

It will ask you to save the file. Go with the default of the **Downloads** folder and click on **Save.** 

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Tags:		
Where:	ownloads	<b>\$</b>
For	rmat: RIS File (.ris)	<b>\$</b>
		Cancel Save

The downloaded file will display at the bottom of the window with a drop down arrow. Go to your **Downloads** folder.

#### First Use:

• In **Downloads**, control-click or **right click on the file**.



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Favorites	Name		Size	Kind	Date Added
AirDrop	Primo_RIS_Ex	Open	000	Document	Today at 8:23 am
Recents		Open With	►	-	
iCloud Drive		Move to Trash			
Applications	-	Get Info		-	
🛄 Desktop		Rename		-	
🕒 Documents			o_RIS_Export.ris"		
Downloads	_	Duplicate Make Alias			
Devices			no_RIS_Export.ris"	-	
Remote Disc		Share	►		
Untitled ≜		Copy "Primo_RIS	6_Export.ris"		
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- Select Get info.
- Go to **Open with...**
- If EndNote does not appear in the list, select **Other** and search for EndNote.

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Downloads Created: Today, 8:23 am Modified: Today, 8:23 am Stationery pad Locked More Info: Name & Extension: Comments: Open with: 
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Stationery pad Locked More Info: Name & Extension: Comments: Open with:
Locked  More Info: Name & Extension: Comments: Open with:   App Store Other
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Open with:        < None>       App Store       Other       Change Allz.
App Store Other Change Altz.
App Store Other Change Alt
Other
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Preview:

- Once EndNote has been selected, click on **Change all**.
- Double click on file and it will send the references to EndNote.



#### Subsequent Uses:

• Repeat the steps on pages 4-6 and the references should now go directly into EndNote.

#### Firefox:

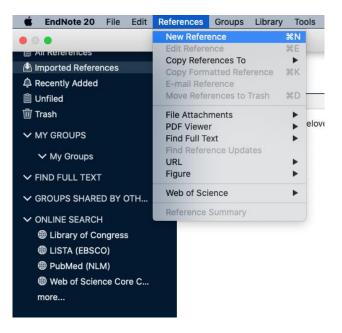
- A window will appear asking what you'd like to do with the file. Select the **Open with** option. Also check the box of the **Do this automatically with files like this from now on**.
- Click on the **Choose** button and **Finder** will open.
- Click on EndNote 20 then EndNote 20 then Open.

You have chosen to open:		Name	Size	Kind	Date Added
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Primo_RIS_Export.ris	Documents	C Microsoft Edge	413.9 MB	Application	Today at 2:23 pm
which is: Text File (405 bytes)	Recents	▼ EN EndNote 20		Folder	Today at 1:46 pm
from: blob:	=	License Agreement.txt	13 KB	Plain Text Document	Today at 1:46 pm
	Macintosh HD	Services		Folder	Today at 1:46 pm
What should Firefox do with this file?	Applications	XML Support			Today at 1:46 pm
	Desktop	Readme.txt	3 KB	Plain Text Document	Today at 1:46 pm
Open with Other		Examples		Folder	Today at 1:46 pm
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Cancel OK		EndNote.pdf	5.6 MB	PDF Document	Today at 1:45 pm
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		Filters		Folder	Today at 1:45 pm
	Tags	Self Service	33.6 MB	Application	22 Feb 2021 at 9:24
	A Ded				

• Click on **OK**. The references will now be added to EndNote

#### Manual Entry:

- 1. You can add references, such as websites, to your library yourself.
- 2. Click on **References > New Reference**.



3. Another window will open. Choose the type of reference you are adding eg. book, journal article from the drop down menu.



	-
	Journal Article
	Legal Rule or Regulation
	Magazine Article
	Manuscript
	Map
	Multimedia Application
	Music
	Newspaper Article
	Online Database
	Online Multimedia
	Pamphlet
	Patent
	Personal Communication
	Podcast
	Press Release
	Report
	Serial
	Social Media
	Standard
	Statute
	Television Episode
	Thesis
	Unpublished Work
1	Web Page

- 4. Enter information in the relevant fields. To move between fields, click on them or use the **Tab** button. **It is not necessary to fill in all the fields.**
- 5. Some fields require information to be entered in a certain way to ensure it appears correctly in the reference list.

# AUTHOR FIELD:

- Be consistent in how you enter author names.
- Always enter the family name first followed by a comma then first name(s) and initials eg. Granger, Louise.
- If there is more than one author, enter each author on a new line.
- If you are using the initials of an author, put a full stop after it eg. Granger, L. M.
- If it is a corporate author, put a comma at the end eg. Tourism Queensland,
- Other examples of authors: Granger, Louise M.
  - de la Salle, George
  - Smith, G.

# TITLE FIELD: (BOOK, JOURNAL)

- Do not enter a full stop at the end of a title. Other punctuation that is part of the title eg. exclamation mark, question mark can be used.
- Enter the title using the capitalisation format of the referencing style you are most likely to use eg. APA 6<sup>th</sup> sentence case



• Journal names can use abbreviated or full titles, depending on the style.

#### **OTHER FIELDS:**

VOLUME NUMBER: just enter the number eg. 123 PAGES: just enter the page numbers eg. 23-34 YEAR: just enter the year eg. 2021

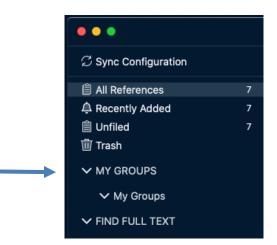
#### PLEASE NOTE: EndNote will add any necessary labels required by the style you choose.

6. To save the information, close the **New Reference** window. You will then be prompted to save your reference. Once you have clicked on **Yes**, you will be returned to your list of references in your EndNote library.

	Save changes to the reco	ord?	
EN	If you don't save, your change	s will be lost.	
	Do not show this message	again.	
	-		
	Don't Save	Cancel	Sa

# USING GROUPS:

- Groups may be used to create subsets of references in a library. (They will not be removed from the **All References** group, just copied).
- The Groups Pane is on the left of the screen. Any groups you create will be listed under **My Groups**.



# **Creating A New Group:**

1. Right click on the name **My Groups** in the left pane. Click on the **Create Group** option from the menu that appears and you will be prompted to create a new group name.



•••			•••	
${\mathcal C}$ Syn	c Configuration		${\mathbb Z}$ Sync Configuration	
	References	7	📋 All References	7
부 Rece	ently Added	7 7	🗘 Recently Added	7
Tras		1	📋 Unfiled	7
✓ MY			🔟 Trash	
✓ MY-	Create Group		V MY GROUPS	
~	Create Smart Group Create From Groups			
Y FIN	Create Group Set		V My Groups	
✓ GR	Rename Group Set Delete Group Set		✓ FIND FULL TEXT	
	INE SEARCH		• HIND FOLL TEXT	

You can also create a group by clicking on the **Groups** menu and selecting **Create Group**.

Groups	Library	Tools	Window
Create	Group		
Create	Smart Gr	oup	
Create	From Gro	ups	
Renam	e Group		
Edit Gr	oup		
Delete	Group		
Share	Group		
Add Re	ferences	То	•
Remov	e Referen	ces Fron	n Group
Create	Group Se	t	
Delete	Group Se	t	
Renam	e Group S	iet	
Create	Citation F	Report	
Manus	cript Mate	her	

2. A text box will appear. Type in the name you want to give your group and hit Enter to save it.

# Adding References To A Group:

- Make sure you are in the All References group. Highlight the reference(s) you want to add. (Note: To select multiple references hold down the Command key while click on references you want to add to the group)
- 2. Right click on the highlighted reference(s) and a drop down menu will appear. (Note: You only have to right click on one reference if you have several references highlighted).
- 3. Click on **Add References To.** Another drop down menu will appear with the names of the groups you have. Click on the group name to which you want to add the reference(s). The reference(s) will now appear in that group as well as in the full list of your library.



Groups Lil	brary	Tools	Window	Help	
Create Gro Create Sm		up		idNote Library.enl	
Create Fro	m Grou	ps		Advanc	ed Search
Rename G	roup				
Edit Group Delete Gro				Ê 2⁺ Z	बे 🌐
Share Gro	up				
Add Refere	ences T	0	•	Create Custom Group	
Remove R	eferenc	es Fron	n Group	My Groups	of drinki
Create Gro	oup Set			Introduction	
Delete Gro Rename G	and the second second	t		Watching YouTube : Ex	traordinary '
Create Cit	ation Re	eport		Microplastic in bottled	natural mine

4. Alternatively, you can drag and drop the references into a group.

# MANAGING YOUR REFERENCES

#### Editing a Reference:

 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

		Ļ
Advanced Search	🗎 Strangelove, 2020	0 #3 Summary Edit 🗙
	<b>B</b> I <u>U</u> X <sup>1</sup> X	Save
🗄 🗠 🏷 🗎 🌐	Reference Type	Book
^ Year Title	Author	Strangelove, Michael
2015 Types and characteris	Year	2020
2020 Watching YouTube : Ex	Title	Watching YouTube : Extraordinary Videos by Ordinary People
2018 Microplastic in bottled	Series Editor	
	Series Title	
	Place Published	Toronto
	Publisher	Liniversity of Terente Brees

2. Make the changes to the record and then click the **Save** button.



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ıthor	Strangelove, N	Michael			
Year	2021				

# Sorting Your Library:

• The quickest way to sort a library is to click on the field headings at the top of your EndNote library eg. **Author, Title, Year** 

	Ļ	Ļ	Ţ
• (	author 🖉	Year $ \scriptstyle \lor $	Title
٠	Strangelove, Michael	2021	Watching YouTube : Extraordinary Videos by Ordinary People

# Sorting On Multiple Fields:

1. Click on Library > Sort Library

Library	Tools	Window	Help					
Sync								
Advanced Search #								
Sort Li	brary							
Find D	uplicates	S						
Find B	roken At	tachment L	.inks					
Open <sup>-</sup>	Term Lis	ts	•					
Define	Term Li	sts	ж4					
Link Te	erm Lists	i	ЖЗ					
Spell C	heck Lik	orary	жү					
Find a	nd Repla	ce	ЖR					
Chang	e/Move/	Copy Field	s					
Recove	er Librar	y						
Library	/ Summa	nry						

2. Choose the fields on which you wish to sort your library. Click on **OK**.



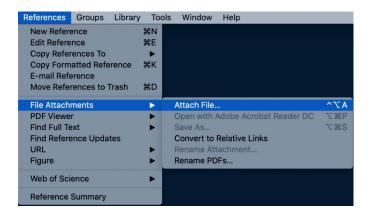
Use the following controls to of for custom sorting.	choose up to 5 fiel	ds as cr	iteria
Sort first by this:			
Author		٢	<u>-</u> +
Then by this:			
Year		٢	<u>-</u> +
Then by this:			
Record Number		٢	<u>-</u> +
Then by this:			
None		٢	<u>-</u> +
Then by this:			
None		۵	<u>-</u> +
Sort Language:			
English			\$
	Cancel	0	ОК

#### ADDING A FILE ATTACHMENT – PDF

- 1. The **File Attachment** field allows you to store the PDF files of your references in your library.
- 2. You can click on the Attach file button at the top of the Summary view of the reference.

McLeod, 2020 #5	Summary	Edit	×
Attach file			

3. You can also highlight a reference and click on **References > File Attachments > Attach File.** 



- 4. You will then be prompted to select a **PDF** file to attach to your reference.
- 5. Once you have selected it, click on **Open**. The **PDF** will now appear in the right hand pane of your screen.
- 6. If you click on the **Reference** tab in the right hand pane, you will see the **PDF icon** (looks like a paper clip) in the **File Attachments** field.



# **IMPORTING A PDF**

#### PLEASE NOTE THIS WILL NOT WORK WITH ALL PDFs.

- If you have a PDF saved on your computer, you can try to import it into your EndNote library. It will place the relevant information in the correct fields and attach the PDF to the File Attachments field. This works best for journal articles and book chapters which show a DOI on the first page.
- 2. Click on File > Import > File...

EndNote 20	File	Edit	References	Groups
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	Clo	se Libi	rary	жw
	Sav	/e		₩S
	Sav	ve As		企業S
	Sa	ve a Co	ру	
	Sha	are		
	Exp	oort		
	Imp	oort		
	Pag	ge Seti	ıp	¢₩P
	Pri	nt		ЖΡ
	Co	mpress	sed Library (.e	nlx)

1. Select the PDF you wish to import. In the **Import Options** drop down menu, choose the **PDF** option. Leave the other options as is. Click on **Import**. If it is a readable PDF, it will be added, along with the citation details, to your library.

Favorites	Name			
Documents Compared Recents Compared Rec	nutrients-12-t	00483.pdf		
Documents Downloads			-	
	Import Options:	PDF File or Folder	0	
	Duplicates:	Import All		
	Text Translation:	No Translation	٥	

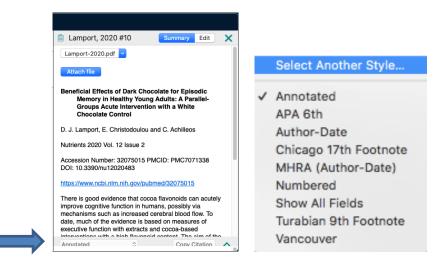
Note: If you don't see the options, click on the Options button in the bottom left corner.



# SELECTING THE OUTPUT (REFERENCING) STYLE:

#### In EndNote:

- 1. In the right pane, locate the reference summary box then click on the down arrow of the box located at the bottom left of this box.
- 2. Click on Select Another Style.



3. The complete list of EndNote styles will appear.

Г

Q Find Name		All Styles	۵
Quick Search		Find by Catego	ory
Showing 500 of 500 styles.			
Name ^	Category		
Ann Rev Physical Chem	Chemistry		
Ann Rev Phytopathology	Agriculture		
Ann Rev Plant Biology	Agriculture		
Ann Rev Psychology	Psychology		
Annals Assn of Amer Gec	Geography		
Annals Behavioral Med	Psychology		
Annals Clin Micro Anti	Microbiology		
Annals Internal Medicine	Internal Medicine		
Annals of Oncology	Oncology		
Annotated	Generic		
APA 6th	Psychology, Multi-	-disciplinary	
APA 6th (sections)	Psychology		
APA 6th - Sentence Case	Psychology		
APA 6th CV	Psychology		
APA 6th-Annotated	Psychology		
APA 6th-full name	Psychology		
App Animal Behaviour Sc	Zoology		
App Phys Letters	Physics		
Applied Catalysis B	Chemistry		
Archives Gen Psych	Medicine		
Archives Toxicology	Pharmacology		
Archives Virology	Virology		
	Style Info/Pi		ncel

4. Find the style you wish to use from the alphabetic list. Click on it and then click on **Choose.** This will now be the current style.

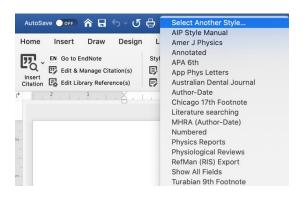


In Word:

- 1. Always check the style in the Word.
- 2. Click on the **EndNote 20** option in the Word menu bar. If the style listed in the **Style** box is not the one you require, click on the drop down menu. A list of "favourites" will be listed. If your style is there, click on it.

Home	Insert	Draw	Design	Layout	References	Mailings	Review	View	Develop	er EndNote 20	<b>Picture Format</b>	🖓 Tell me
	EN Go to E	Manage Cita			otated Citations and Biblio re Bibliography		Categorize			Tools 🗸 Manuscript Matcher Preferences	<b>?</b> Help	

3. If your style isn't in the "favourites" list, click on Select Another Style.



4. The **EndNote 20 Styles** window will appear. Select your style from the alphabetic list and it will now be the current style.

Name	<ul> <li>Category</li> </ul>
Ann Rev Immunology	Immunology
Ann Rev Medicine	Medicine
Ann Rev Neuroscience	Neuroscience
Ann Rev Nuclear Part Sci	Science
Ann Rev Pharmacology Toxico	Pharmacology
Ann Rev Physical Chem	Chemistry
Ann Rev Phytopathology	Agriculture
Ann Rev Plant Biology	Agriculture
Ann Rev Psychology	Psychology
Annals Assn of Amer Geog	Geography
Annals Behavioral Med	Psychology
Annals Clin Micro Anti	Microbiology
Annals Internal Medicine	Internal Medicine
Annals of Oncology	Oncology
Annotated	Generic
APA 6th	Psychology, Multi-disci
APA 6th - Sentence Case	Psychology
APA 6th (sections)	Psychology
?	Cancel Choose

#### **INSERTING IN-TEXT CITATIONS:**

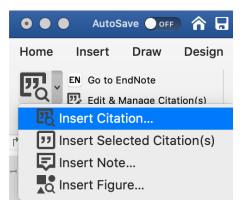
- EndNote works with Word to create in-text citations and reference lists.
- You can add in-text citations as you are writing or if you have a completed document.



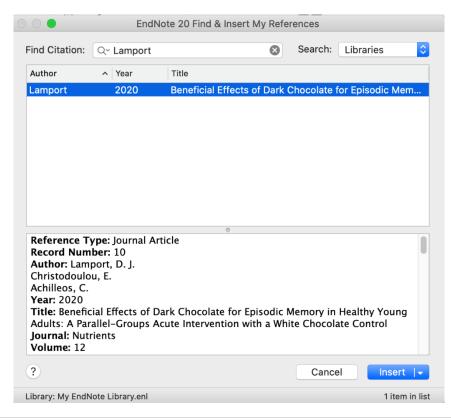
• EndNote provides a number of different methods of inserting in-text citations into your document. Each time you insert a new reference, it will be added to a reference list that is created at the end of your document. (If you are using a reference multiple times in your document, it will only appear once in the reference list).

#### "Insert Citation" Option:

- 1. In Word, place your cursor where you want the in-text citation to appear. Make sure the referencing style you want is displayed in the **Style** box.
- 2. Go to the **EndNote 20** menu. Click on the down arrow next to **Insert Citation**. From the drop down box, select **Insert Citation**.



3. You will then get a search screen. Type in details of your reference eg. the last name of the author, then press **Return** on your keyboard. (If you have a number of authors with the same last name, they will be listed. The full details of each reference will appear at the bottom of the window when you click on them). Highlight the one you need.





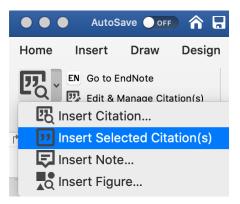
4. Click on **Insert** (located on the bottom of the search screen). If you want to insert the reference with options such as excluding the author name, click on the down arrow beside insert and click on the option you want.



5. Repeat for each reference you need to include.

# "Insert Selected Citation" Option:

- 1. In **EndNote**, highlight the reference you are using by clicking on it once. (You can use more than one reference in the same citation just highlight all those you need by holding the **Command** key down as you select them).
- 2. Switch back into Word. Go to the EndNote 20 toolbar.
- 3. Check that the correct referencing style is displayed.
- 4. Put your cursor where you want the in-text citation to appear in your Word document. In the EndNote 20 menu, click on the Insert Citation down arrow icon and then click on Insert Selected Citation(s). The in-text citation will appear in your Word document and the reference will appear at the end of your Word document.



5. Repeat these steps for each of the references you want to include.



# Recent Developments in Personal Bibliographic Software: a Critical Review By E.N. Fyve

Since the 1980s, there have been a variety of software products on the market which can be classified under the general heading of Personal Bibliographic Software (Brown & Hackett 1990). All of these products perform the same two basic functions (Dickey 2001). They allow the user to maintain a database of bibliographic references and they permit the generation of a bibliography containing some or all of those references.

Substantial developments have taken place in the functionality of personal bibliographic software (Gardner & Terpening 1997). Today it is not difficult to find a product that can automatically import references from a CD-ROM or web database and format both in-text citations and a list of references in a wide variety of styles.

in text citation

Brown, P. & Hackett, F. 1990, Managing Meetings, Harper Collins.

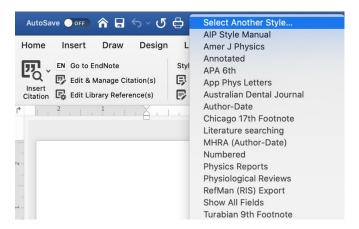
Dickey, F. 2001, Last Minute Meetings, Career Press, Franklin Lakes, NJ.

Gardner, L. & Terpening, S. 1997, *The Art of Event Design*, Mirimar Communications, California

Reference list

# CHANGING THE STYLE OF YOUR IN-TEXT CITATIONS & REFERENCE LIST:

- 1. You need to be in the **Word** document you want to change.
- 2. Click on the **EndNote 20** tab. Click on the down arrow in the **Style** box. Click on the style you want to change your bibliography to and it will automatically change in your Word document.



- 3. Go into **Select Another Style** if the style you need is not in the "favourites" list and choose the required style.
- 4. Your document will now update to the new style.



5. This works well for author, date and numbered style. It is more complicated to switch to or from a footnote style. Please see you librarians for assistance.

# ADDING PAGE NUMBERS:

1. To add page numbers to an in-text citation, first click on the in-text citation once so a grey highlight appears.

and create automatic bibliographies in your essay or paper (Morrow, 2014).

2. Click on the EndNote 20 tab in Word and then click on the Edit & Manage Citation(s) icon.



3. The **Edit & Manage Citations** box will appear. Make sure the citation to which you want add page numbers is highlighted. In the **Pages** box, type in the page numbers. The **Suffix** box can also be used.

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Citation		^ Coun	t Library	
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	Lamport, 2020 #10	2	My EndNote Library	* ~
•	Strangelove, 2021 #3	1	My EndNote Library	<b>*</b> ~
• •	Lamport, 2020 #10	2	My EndNote Library	* ~
• •	Welle, 2018 #1	1	My EndNote Library	<b>*</b> ~
$\bullet$	Casado, 2015 #2	1	My EndNote Library	*~

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Totals: 1 Cita	tion Group 5	Citations, 4 Refere	ences		

4. The page number will now appear in the in-text citation eg. (Lamport, Christodoulou, & Achilleos, 2020, p. 78). Repeat these steps for adding other page numbers.



# **DELETING IN-TEXT CITATIONS:**

1. Highlight the in-text citation you want to delete.

Chocolate has many health benefits (Lamport et al., 2020).

2. Click on the Edit & Manage Citation(s) icon in the toolbar.

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Insert Citation 🛱 Edit & Manage Citation(s) Edit Library Reference(s)	Style: UQ R&I Publication Grants Update Citations and Bibliogra Configure Bibliography	iphy	ize References ∨ Formatting is Off ∨	Tools ∨ ∭ Manuscript Matcher	<b>?</b> Help

3. Make sure the citation you want to remove is highlighted in the top window. Click on the down arrow beside **Edit Reference**. Click on **Remove Citation** and then click on **OK**.

000	EndNote 20 Edi	t & Manag	e Citations	
Citation		∧ Count	Library	
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•	Strangelove, 2021 #3	1	My EndNote Library	* ~
+	Welle, 2018 #1	1	My EndNote Library	* ~
▼ (Lamport e	et al., 2020)			
	Lamport, 2020 #10	1	My EndNote Library	<b>*</b> ~
				Edit Library Reference
				Remove Citation
				Update From My Library.
?			Cancel	ок

- 4. The in-text citation will now be removed.
- 5. If it is the only use of that reference as an in-text citation, it will be removed from the reference list at the end of the document. However, if it has been used elsewhere in the document, it will remain in the reference list.

Note: This is the best way to delete any in-text citations. It will cleanly remove any computer coding as well as update the reference list correctly.



#### **REMOVING AUTHOR INFORMATION:**

- 1. Occasionally, you may only want the year information to appear in an in-text citation eg: Cunningham et al. (2017) states.....
- 2. Highlight the citation from which you wish to exclude the author. Click on the **Edit & Manage Citation(s)** option.
- 3. In the **Format** drop down menu, choose the **Exclude Author** option.

000	EndNote 20 Edit &	Manage	e Citations	
Citation	^	Count	Library	
▼(Casado, F	Ramos, Rodríguez, Moreno,	& Gil, 2	015; Lamport, Christod	doulou, &
	Strangelove, 2021 #3	1	My EndNote Library	*~
• •	Welle, 2018 #1	1	My EndNote Library	*~
+	Casado, 2015 #2	1	My EndNote Library	*~
▼ (Lamport o	et al., 2020)			
• •	Lamport, 2020 #10	1	My EndNote Library	* ~
	✓ Default	Refer	ence	
Prefix:	Display as: Author (Year)	_		
	Exclude Author Exclude Year			
Suffix:	Exclude Author			
Suffix: Pages:	Exclude Author Exclude Year Exclude Author & Year			
	Exclude Author Exclude Year Exclude Author & Year		Cancel	ОК

4. The author will be removed from the citation but the year will remain. Other instances of the citation won't be affected nor will the reference list.

Chocolate has many health benefits (2020).

- 5. You can change this by going back into the **Format** drop down menu and changing it back to **Default** in the **Edit & Manage Citation(s)** window.
- 6. You can also right click on your citation (it will be highlighted in grey). Choose the **Edit Citation** in the drop down menu and click on **Exclude Author** on the next menu.



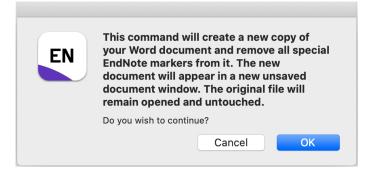
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	Reply To Comment Delete Comment Resolve Comment		
	Update Field Toggle Field Codes		
	Font Paragraph	D₩ M₩J	
	New Comment		
	Edit Citation(s)	•	Default Format
	Import Image		Display As: Author (Year) ✓ Exclude Author
			Exclude Year Exclude Author & Year Show Only in Bibliography
			More

# CONVERTING TO PLAIN TEXT:

- 1. Make sure your document is saved.
- 2. Go to the EndNote tools in Word. Click on **Tools** and choose the **Convert to Plain Text** option.

Home Insert Draw Design	Layout References Mailings	Review View Dev	veloper EndNote 20 🖓 Tell me
- EN Go to EndNote	Style: APA 6th	🙀 Categorize References 🗸	1 Tools V
		III Instant Formatting is On V	Convert to Unformatted Citations
Citation 🕞 Edit Library Reference(s)	Insert Citation 🙀 Edit Library Reference(s) 🕞 Configure Bibliography		Convert to Plain Text
r	1 2 3 4	5 6 7	Export Traveling Library

3. A message box will appear explaining it will create a copy that is plain text while keeping the EndNote linked version.



4. Save the untitled plain text copy, giving it a name that identifies it as the plain text version eg. assignment\_plain\_text.docx



# SAVING A COPY OF YOUR LIBRARY

#### ALWAYS BACK UP YOUR LIBRARY REGULARLY

- When you save a new library, two files are created a .enl and a .DATA. These two files need to stay together so all your library's information is available. The .DATA folder contains any file attachments eg. PDFs and group information.
- When moving your library, ensure that both files stay together in the same folder.
  - EndNote 20 File Edit References Groups New... Open Library... **#**0 Open Shared Library... **企業O Open Recent** • **Close Library** #W Save #S 0#S Save As. Save a Copy... Share... Export... Import... 企業P Page Setup... Print... ЖP Compressed Library (.enlx)...
- 1. Have your EndNote Library open. Click on **File > Save A Copy**.

2. Give your copied library a name or accept the default (which is the name of your original library file with Copy at the end eg. My EndNote Library Copy). Choose where to save it.

**NOTE:** The **Save a Copy** command creates a **copy** of your library and keeps your original one.