EndNote X9: Getting Started (Mac)

Contents

Libraries created in Mac version X9.3.2 and above will not open in older Mac versions or Windows versions X9.3.2 and earlier.

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.
- A common error you will see when opening older libraries is:-
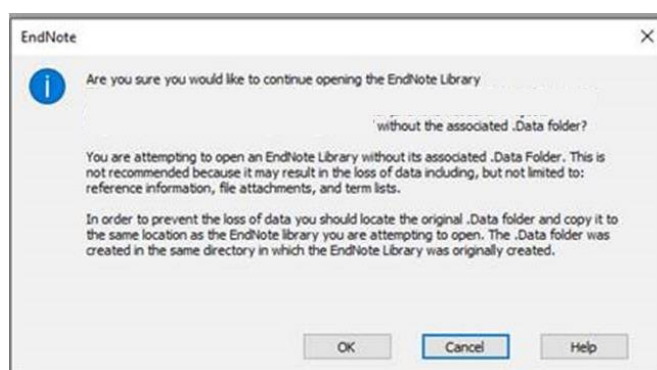
- You can open libraries created in older versions in the newest version. They will be converted to the newest format. Once converted however, the libraries will no longer open in earlier versions. This process **can not be reversed**. Always create **backups of your libraries before upgrading**.
- Libraries from different versions can be shared using EndNote Online. Information about this is available on our website https://web.library.uq.edu.au/research-tools-techniques/referencing-software/endnote/using-endnote/syncing-and-sharing-your-endnote-library

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 **EndNoteX9** option in the top, left corner of the screen.
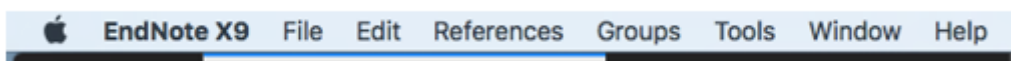
2. Click on the **Check for updates** option.
3. Follow on the on screen prompts.

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**.
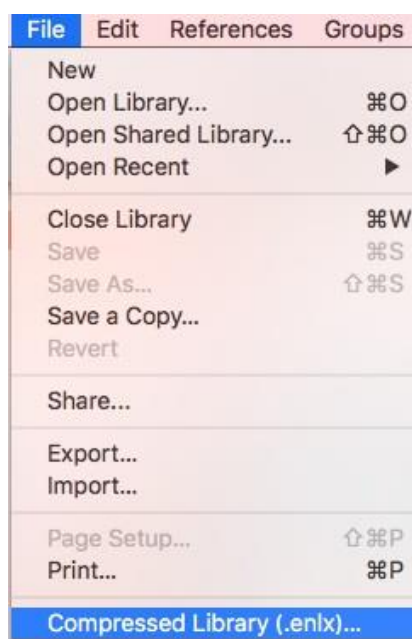
3. A **Compressed Library** window will open. Click on **OK**.
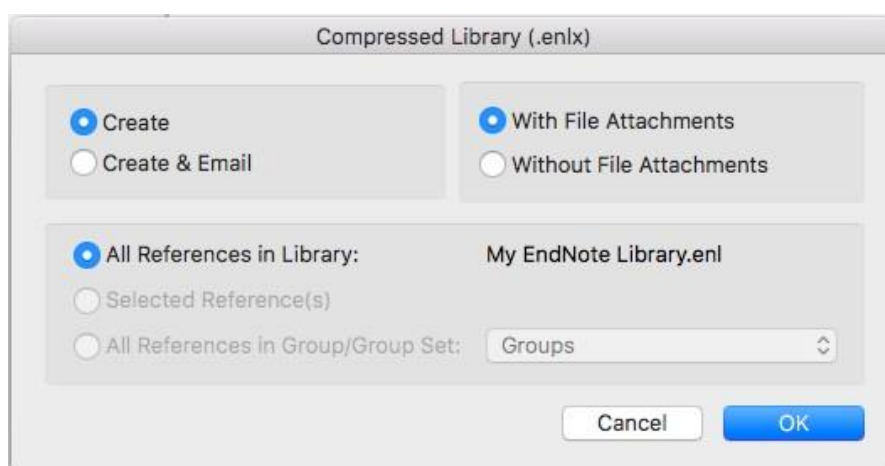
4. Give your compressed library a name. For a backup, we recommend adding "Backup" and the date to the name eg. BACKUP My Thesis Library 3May2018. Click on **Save**.
5. The file will now be saved. Add to your backup locations.
6. To open the file, double click on it on any computer with EndNote installed.

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.
    - Physio_4_pead_burns_16_09_26
    - Physio-4-pead-burns_16_09_26
    - Physio4PeadBurns_16_09_26

Passwords:

- Minimum of 12 characters, alphanumeric with characters, upper and lower case
    - As an example - Her$t0n_L!br@ry951

     o   The longer the password, the more variation on possibilities and the harder it is to "crack"

Note:
- Constantly assess the risks
- Evaluate the inconvenience and stress of losing your data/thesis/EndNote library
- Evaluate your security measures regularly
- Make sure you don't breach any ethics approval with your Research Data Management

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.
- Cloud storage can be used as storage, eg. backing up, or as a way of accessing your EndNote library from different locations.
- 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**
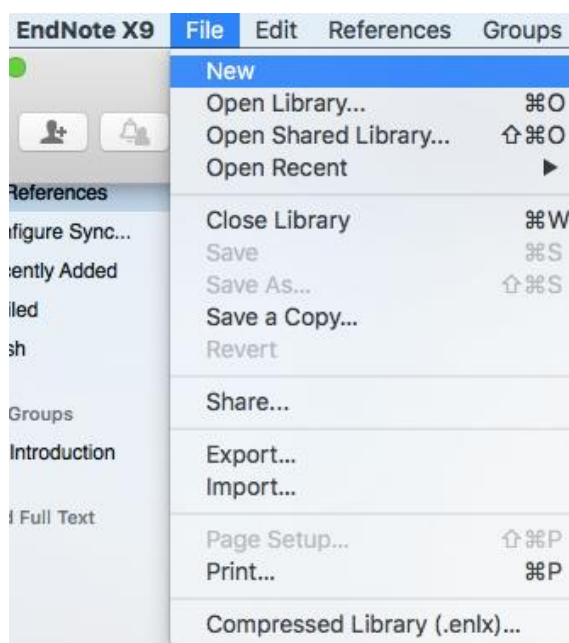
2. Choose where you want your library saved and give it a name. Click on **Save**.
3. You will now have a blank library.
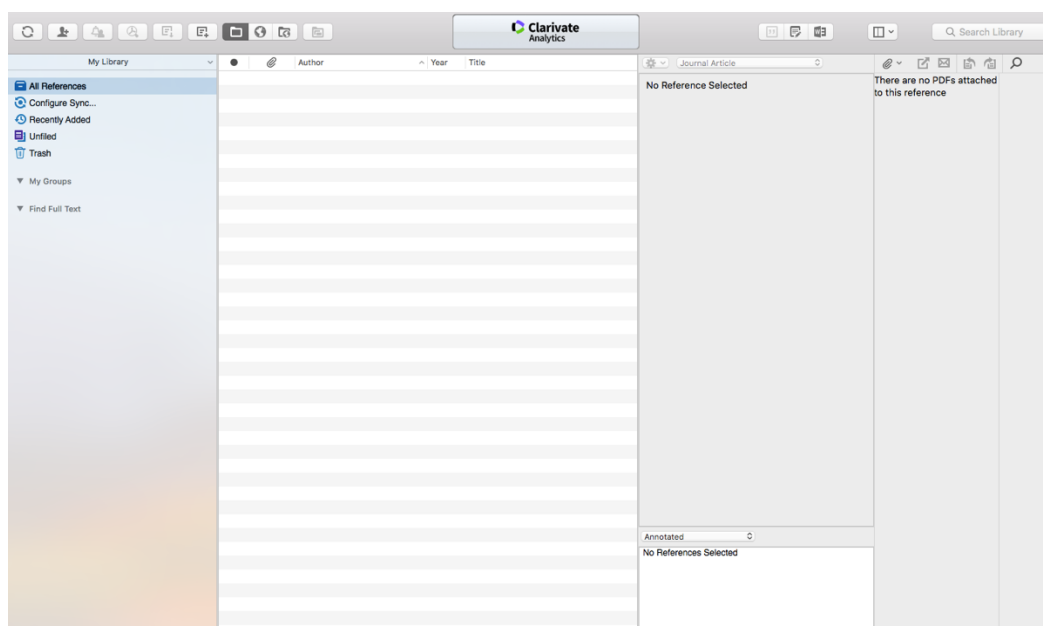
> **A library is where you store your references. You are able to create as many libraries as you wish.**

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.

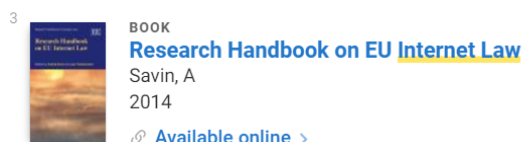- On a Mac, Mozilla Firefox or Chrome web browsers are recommended. **Do not use Safari**.

Exporting From UQ Library Search:

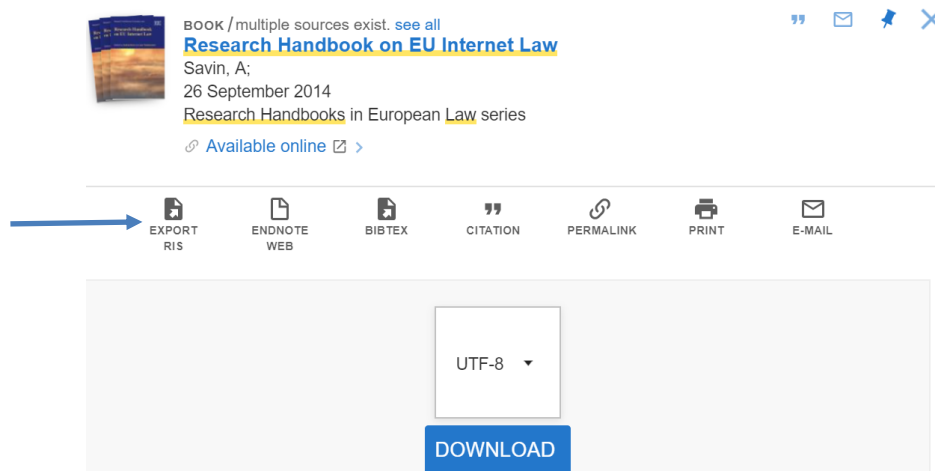Make sure you are logged into the UQ Library Search.

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.
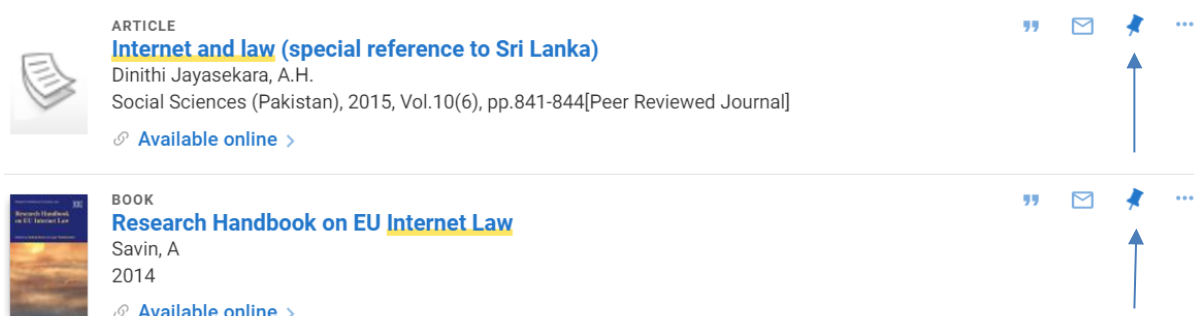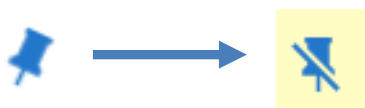
3   **BOOK**
Research Handbook on EU Internet Law
Savin, A
2014
   Available online >

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

BOOK / multiple sources exist. see all
Research Handbook on EU Internet Law
Savin, A;
26 September 2014
Research Handbooks in European Law series
   Available online >

| EXPORT RIS | ENDNOTE WEB | BIBTEX | CITATION | PERMALINK | PRINT | E-MAIL |

UTF-8 ▾

DOWNLOAD

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.

ARTICLE
Internet and law (special reference to Sri Lanka)
Dinithi Jayasekara, A.H.
Social Sciences (Pakistan), 2015, Vol.10(6), pp.841-844[Peer Reviewed Journal]
   Available online >

BOOK
Research Handbook on EU Internet Law
Savin, A
2014
   Available online >

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.
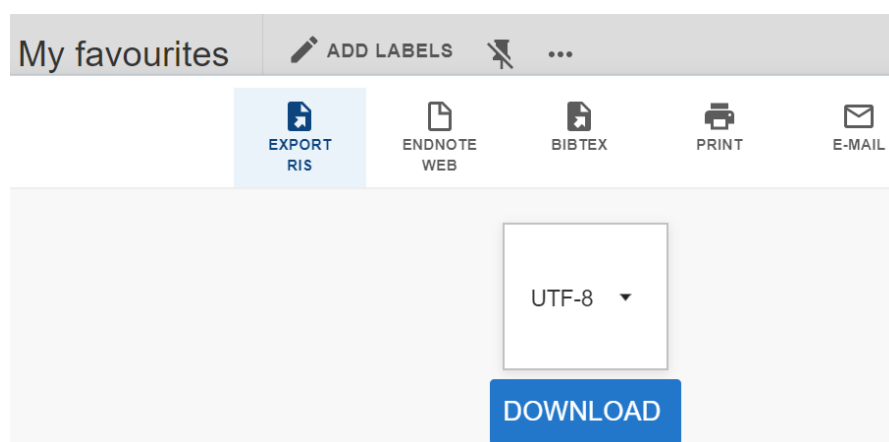
📌   📇 MY ACCOUNT   ↪ LOG OUT
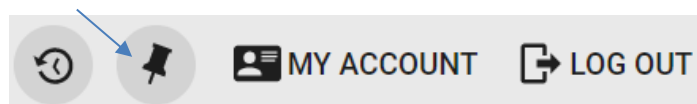
3. You will then be taken to the **Saved Items** area of your account which will list your selected items. Choose the ones you wish to export to EndNote by checking them.
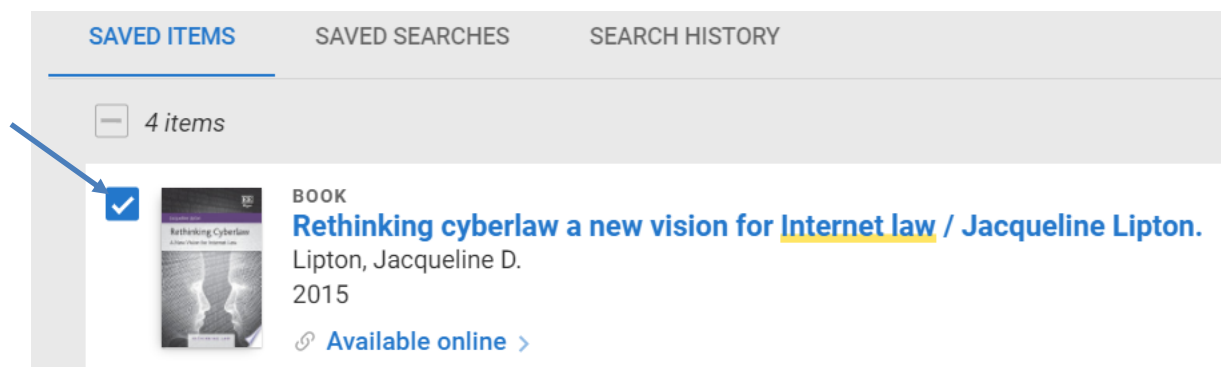
4. Click on the "**Export to**" **actions** icon (three horizontal dots) towards the top of the screen.
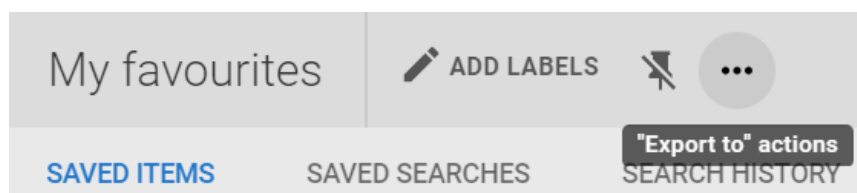
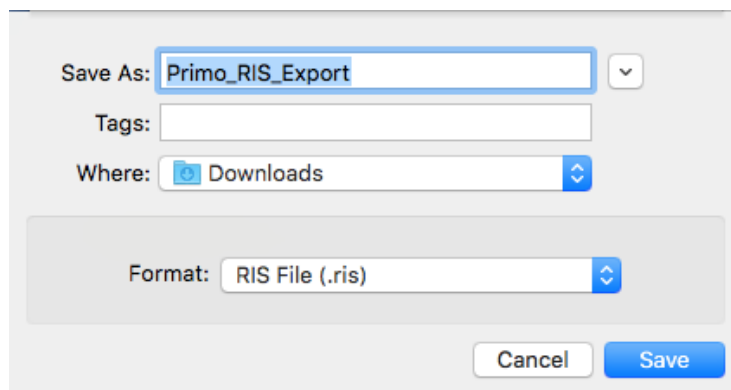5. Click on the **Export RIS** icon. Click on the **Download** button that appears.

6. Chrome and Firefox handle the direct export differently.

Chrome:

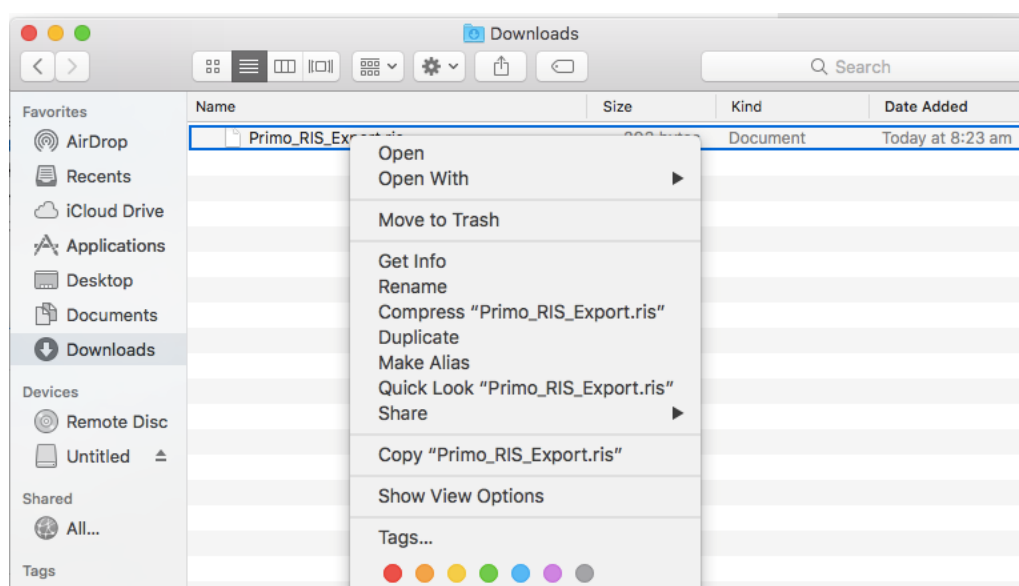It will ask you to save the file. Go with the default of the **Downloads** folder and click on **Save.**

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.

- Select **Get info.**
- Go to **Open with…**
- If EndNote does not appear in the list, select **Other** and search for EndNote.
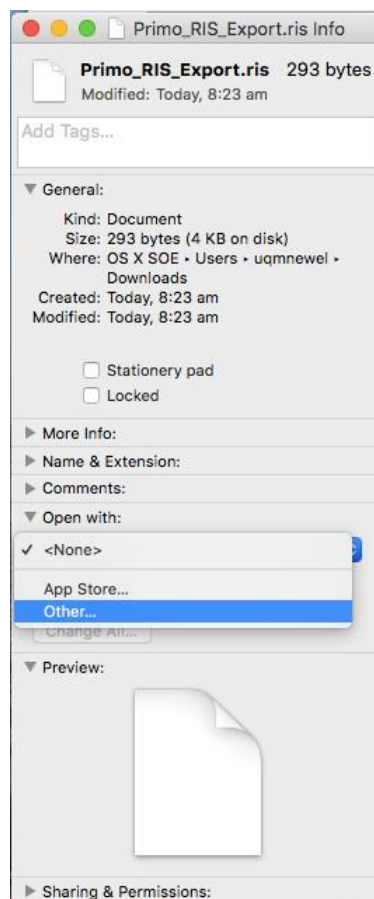
- Once EndNote has been selected, click on **Change all**.
- Double click on file and it will send the references to EndNote.

Subsequent Uses:

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

Mozilla 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.
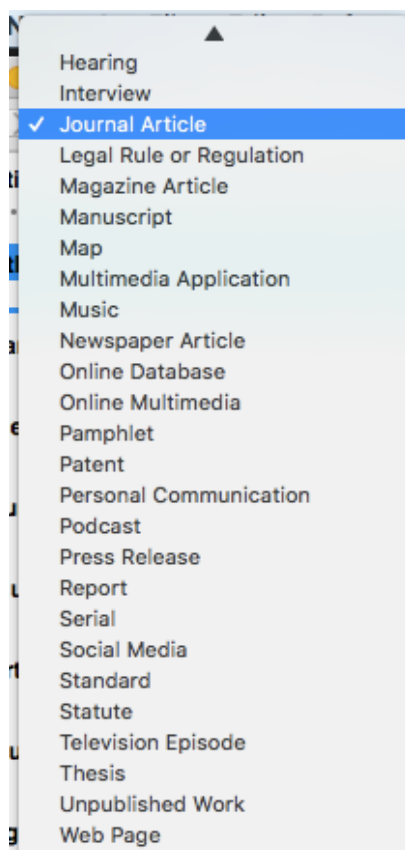- Click on **EndNote X9** then **EndNote X9** then **Open**.
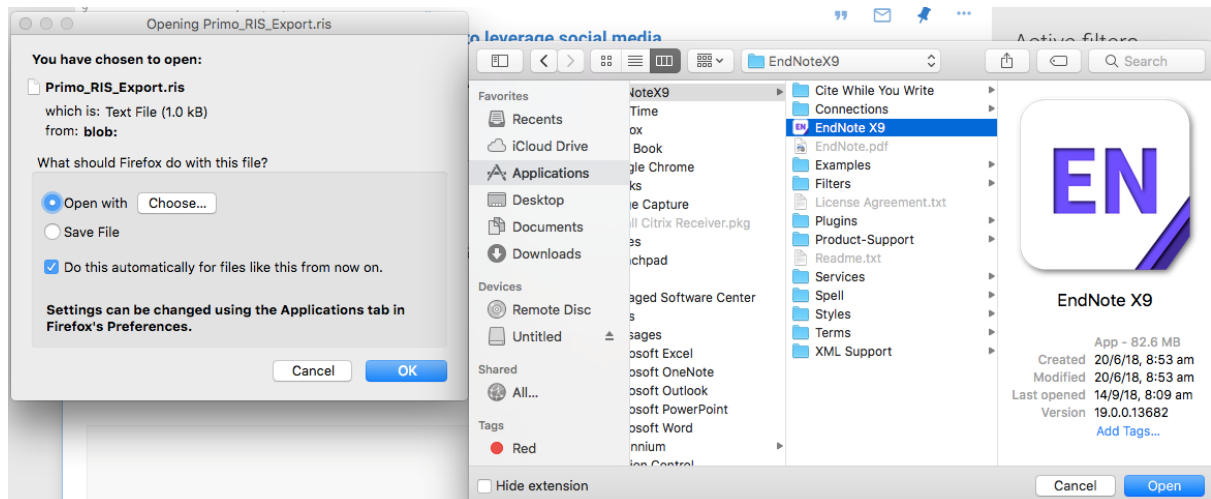
- Click on **OK**. The references will now be added to EndNote

Manual Entry:

1. You can add references, such as websites, to your library yourself.
2. Click on **References > New Reference**.
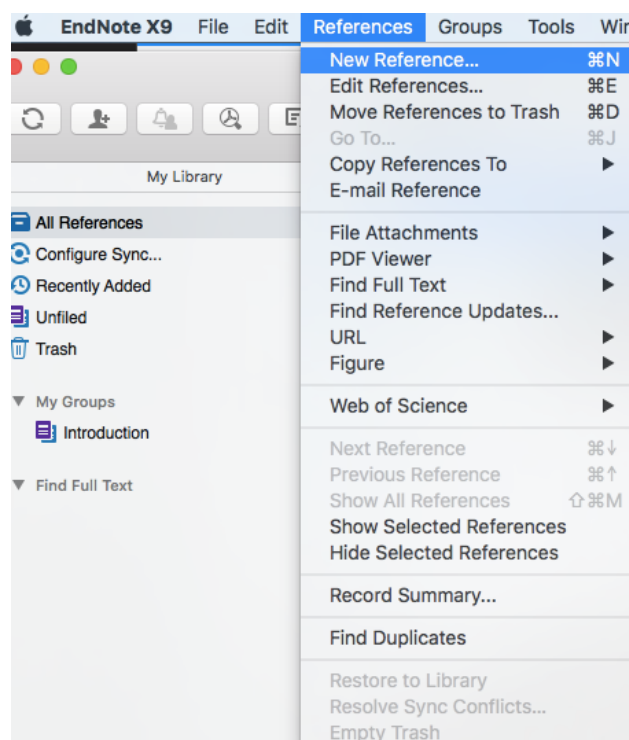
3. Another window will open. Choose the type of reference you are adding eg. book, journal article from the drop down menu.

A dropdown menu listing reference types: Hearing, Interview, **Journal Article** (selected, checkmarked), 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, 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 6th – 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. 2010

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.
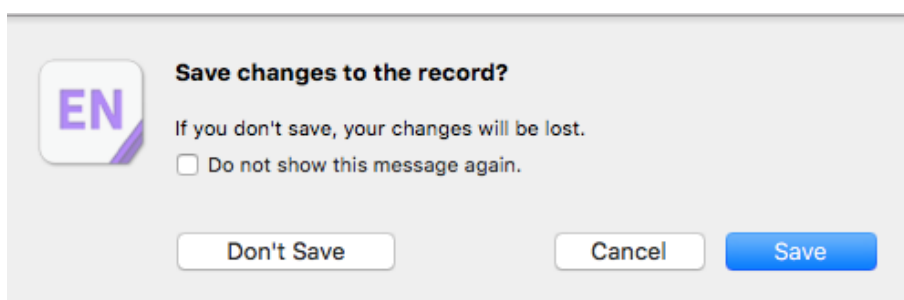

USING GROUPS:

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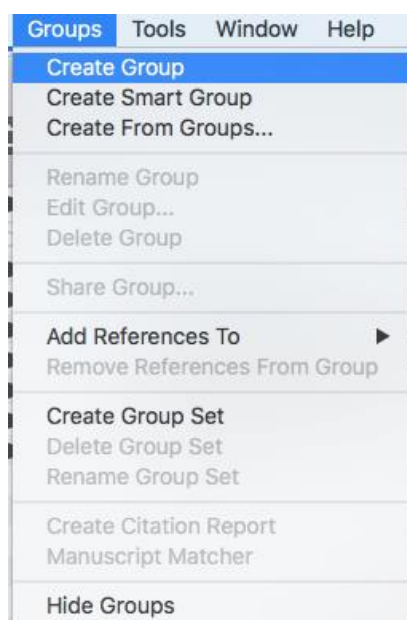- The Groups Pane is on the left of the screen. Any groups you create will be listed under **My Groups**.
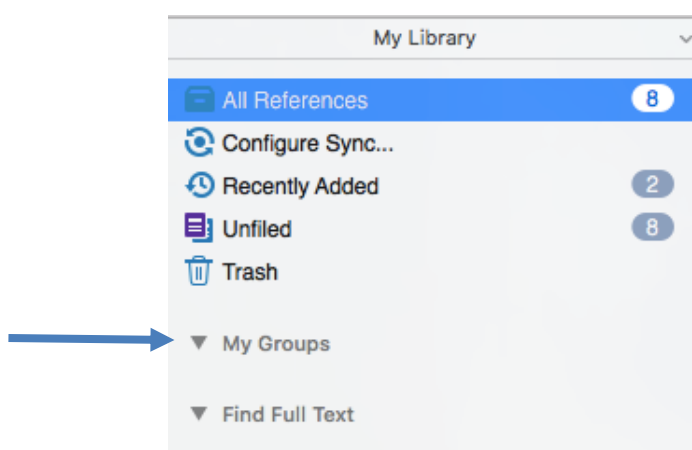
Creating A New Group:

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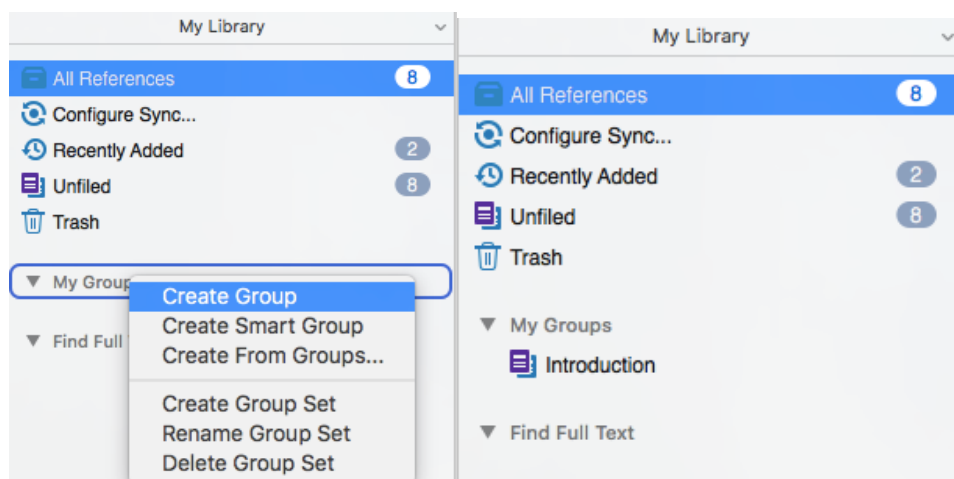
You can also create a group by clicking on the **Groups** menu and selecting **Create Group**.

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:

1. Make sure you are in the **All References** group. Highlight the reference(s) you want to add.
2. Right click on the highlighted reference(s) and a drop down menu will appear. (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.
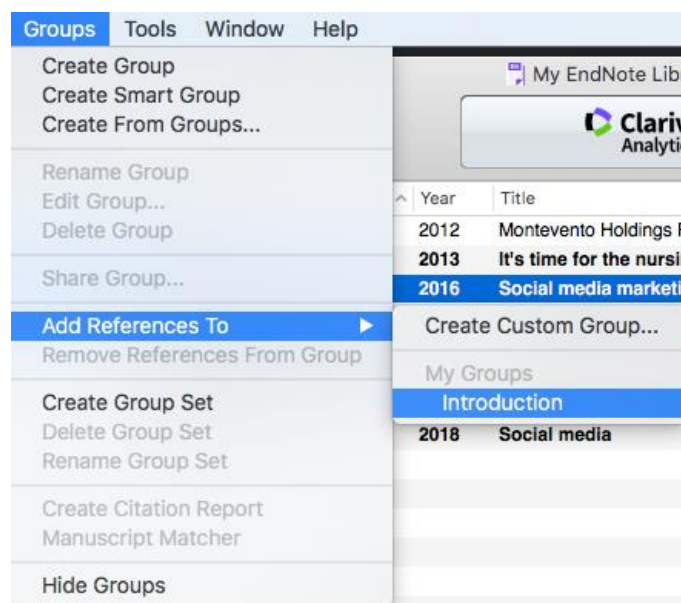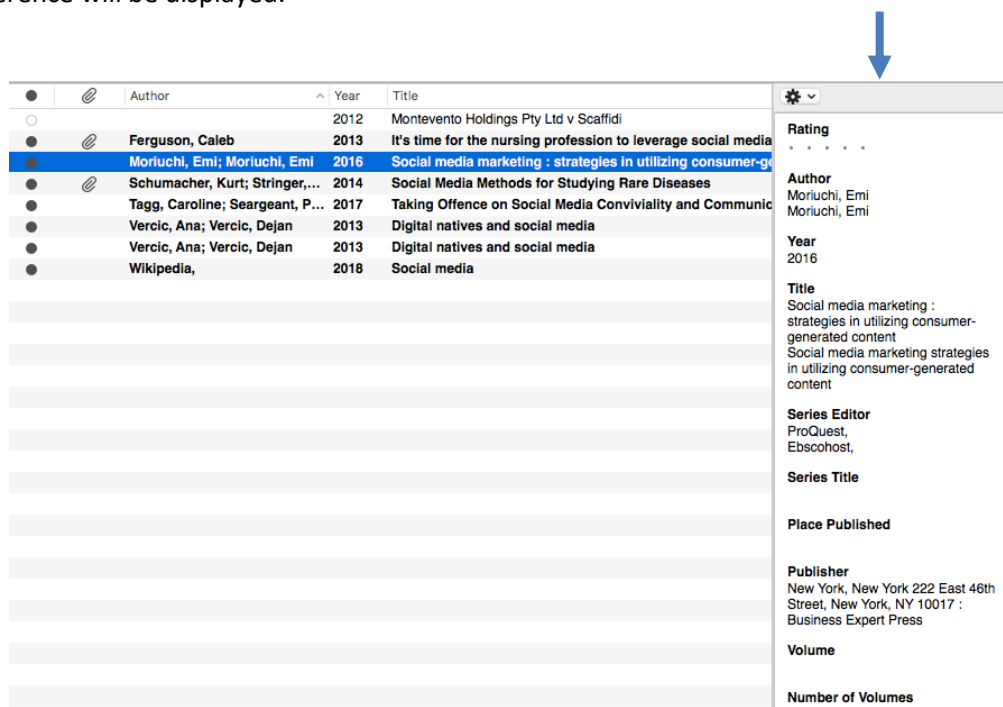
4. Alternatively, you can drag and drop the references into a group.

MANAGING YOUR REFERENCES

Editing a Reference:

1. Highlight the reference you want to edit. In the right hand pane, all the fields of the selected reference will be displayed.

2. Make the changes to the record in the right hand pane and then click **File > Save** OR click anywhere in the main list of references and you will be prompted to save your change(s).
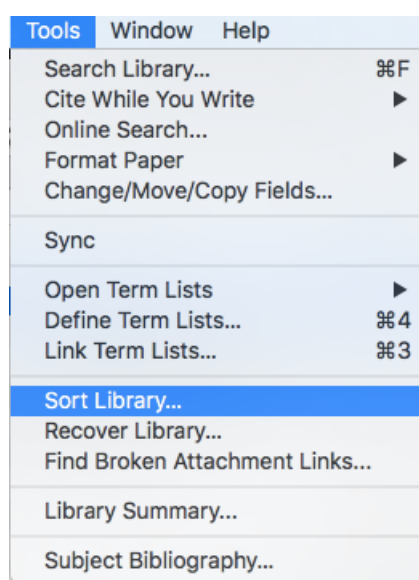
Sorting Your Library:

- 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, Record number.**
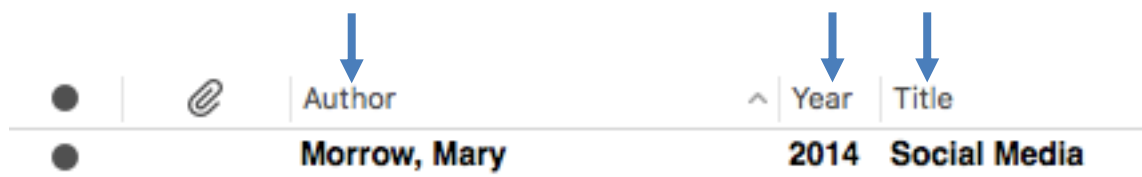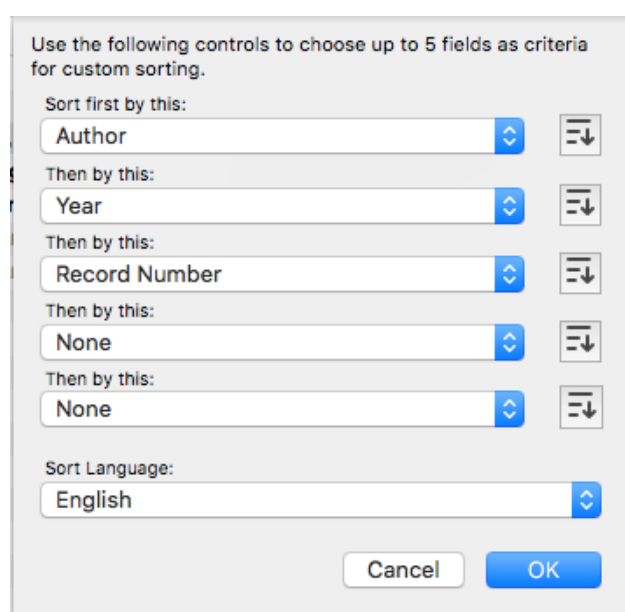

Sorting On Multiple Fields:
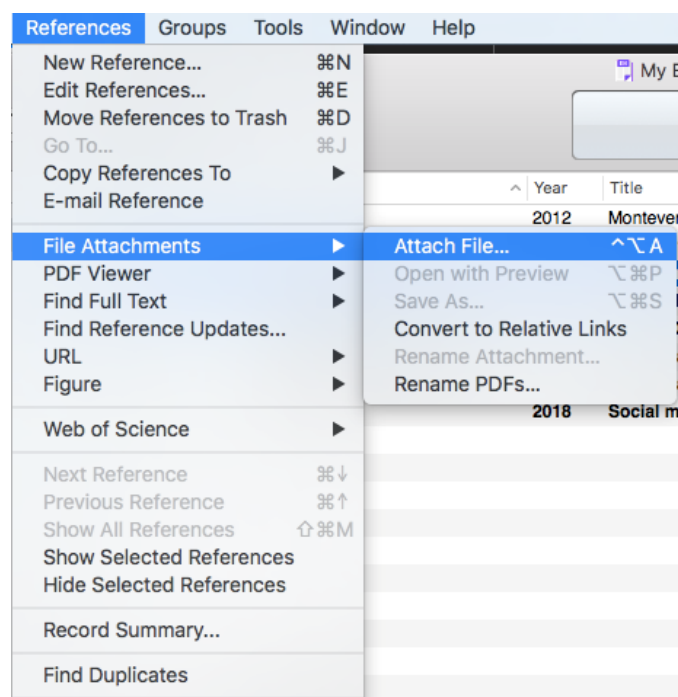
1. Click on **Tools > Sort Library**

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

ADDING A FILE ATTACHMENT – PDF

1. The **File Attachment** field allows you to store the PDF files of your references in your library.
2. Highlight a reference in your EndNote library. Click on **References > File Attachments > Attach File.**


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

IMPORTING A PDF

PLEASE NOTE THIS WILL NOT WORK WITH ALL PDFs.

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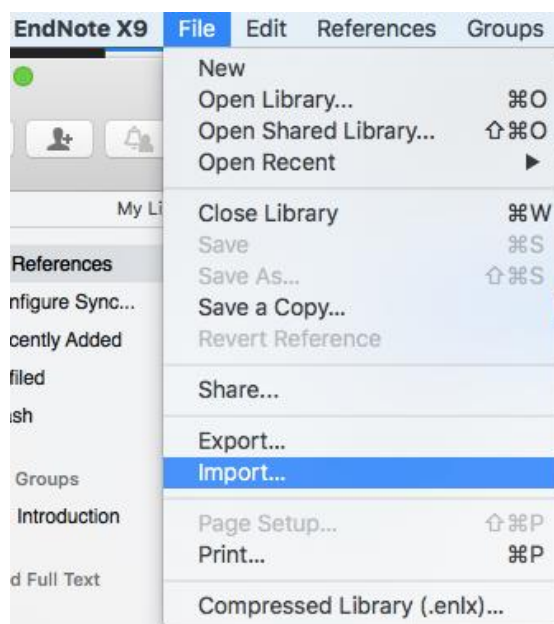
1. Select the PDF you wish to import. In the **Import Options** drop down menu, choose the **PDF** option. Leave the other options as is. Click on **Import**. If it is a readable PDF, it will be added, along with the citation details, to your library.
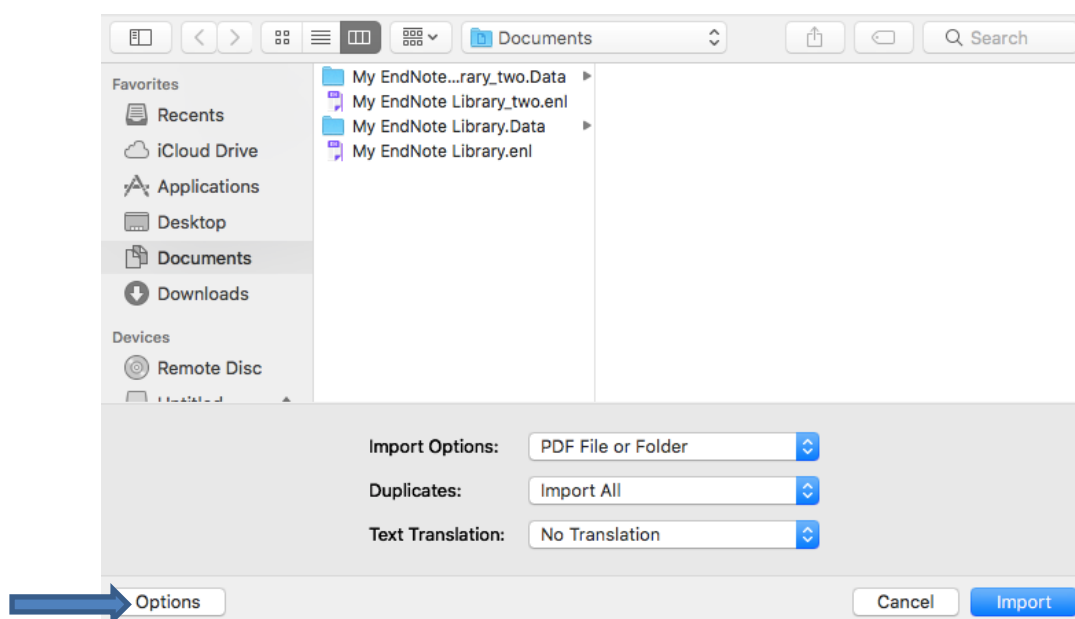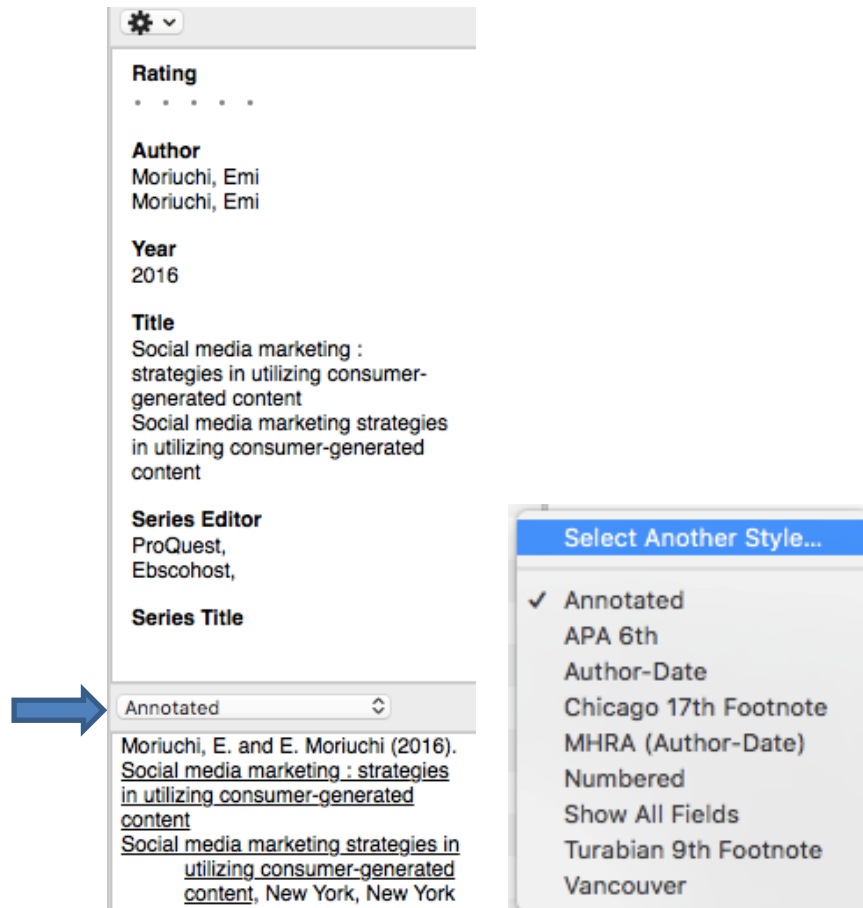

Note: If you don't see the options, click on the Options button in the bottom left corner.
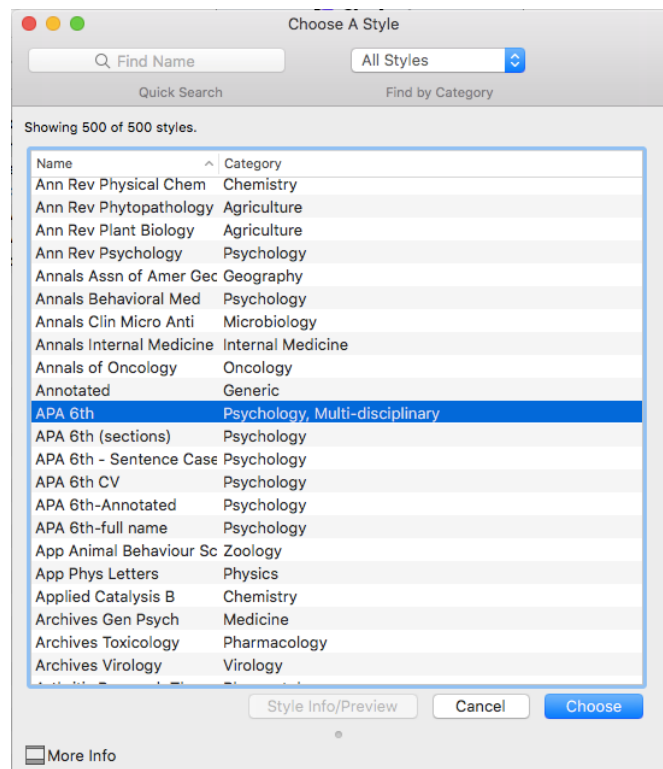
SELECTING THE OUTPUT (REFERENCING) STYLE:

In EndNote:

1. Click on the down arrow of the box located in the right pane, under the fields of the highlighted reference.
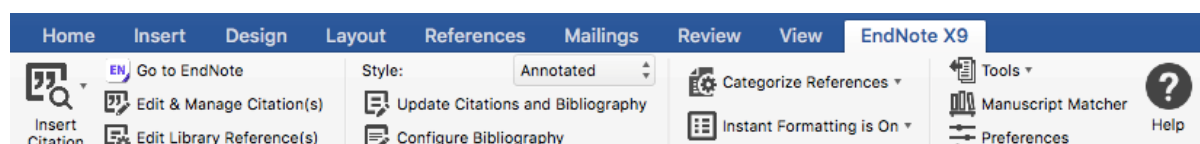2. Click on **Select Another Style**.

3. The complete list of EndNote styles will appear.

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 EndNote X9 toolbar if you have changed it in EndNote. Sometimes the style will not have changed in Word.
2. Click on the **EndNote X9** 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.

3. If your style isn't in the "favourites" list, click on **Select Another Style**.
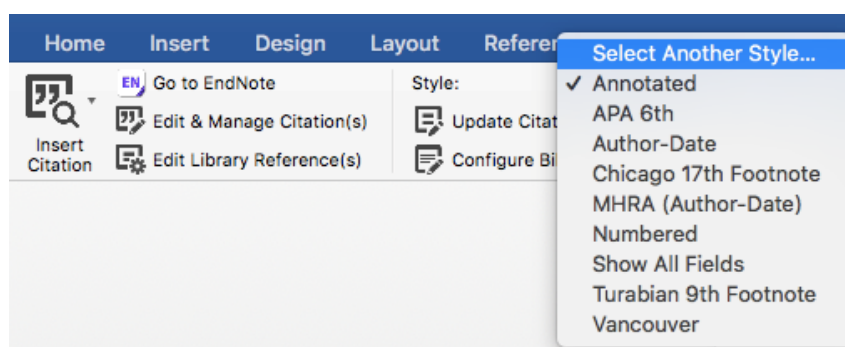
4. The **EndNote X9 Styles** window will appear. Select your style from the alphabetic list and it will now be the current style.
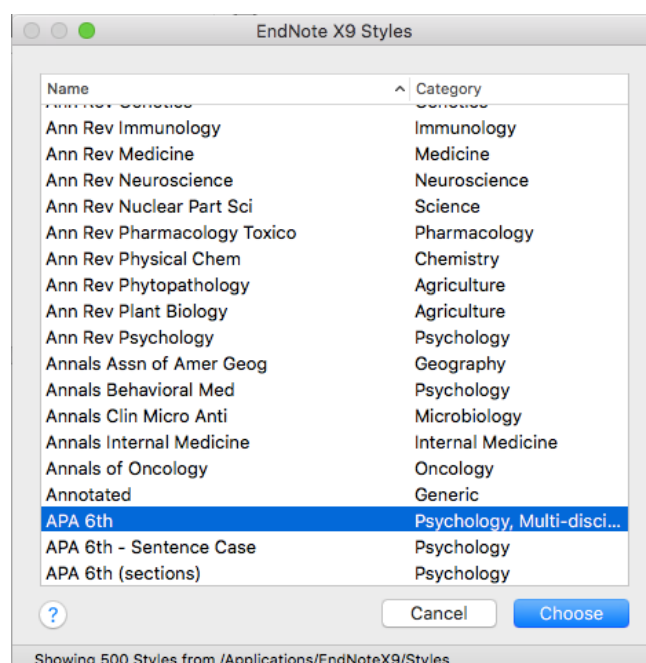
INSERTING IN-TEXT CITATIONS:

- 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).

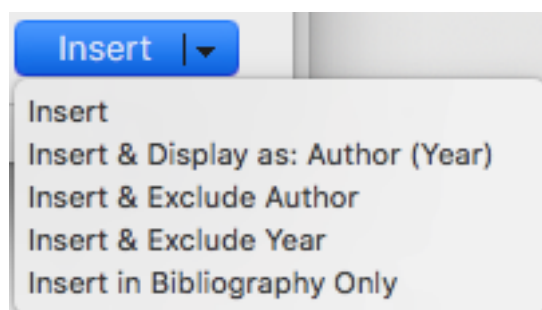**"Insert Citation" Option:**

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 X9** menu. Click on the down arrow next to **Insert Citation**. From the drop down box, select **Insert Citation**.
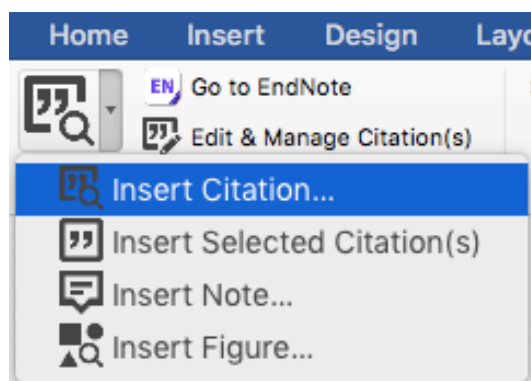
3. You will then get a search screen. Type in the last name of the author you want to insert. (If you have a number of authors with the same last name, they will be listed. The full details of each reference will appear at the bottom of the window when you click on them). Highlight the one you need.
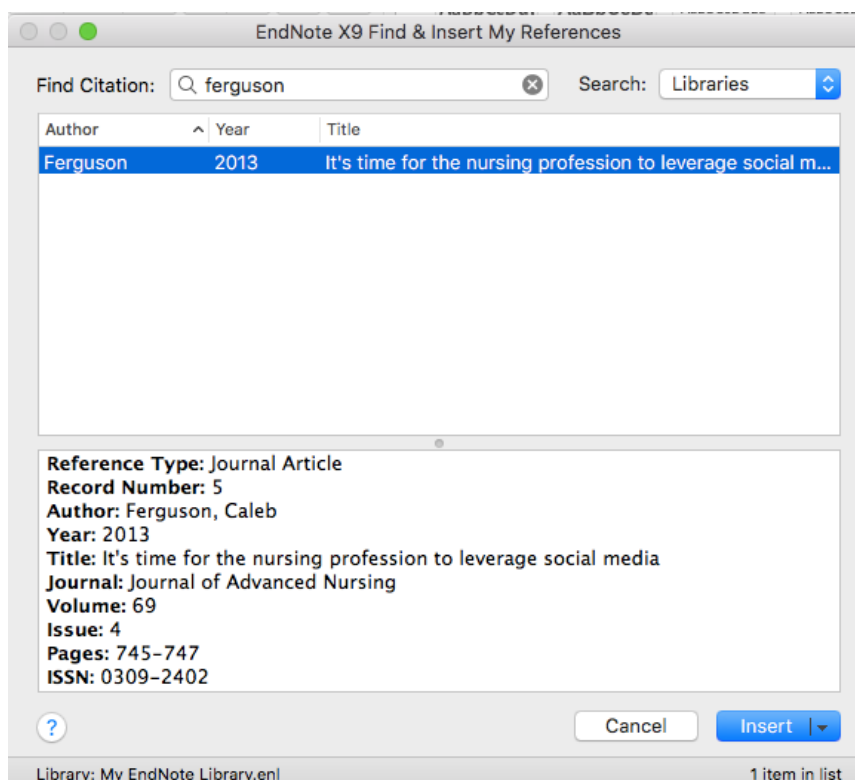
4. Click on **Insert** (located on the bottom of the search screen). If you want to insert the reference with options such as excluding the author name, click on the down arrow beside insert and click on the option you want.

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 X9** 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 X9** 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.
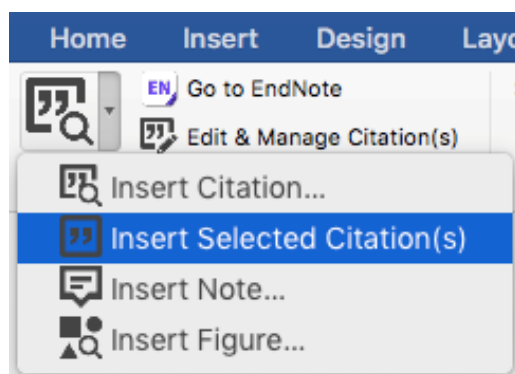
5. Repeat these steps for each of the references you want to include.

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

Inserting A Reference From EndNote:

1. In Word, place your cursor where you wish to add the reference.
2. Go to EndNote. Highlight the reference(s) you want to use.
3. Click on the **Insert Citation** button at the top right of the EndNote window.

4. It will switch to Word and insert your selected references.

5. Repeat as needed.

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 X9** 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.
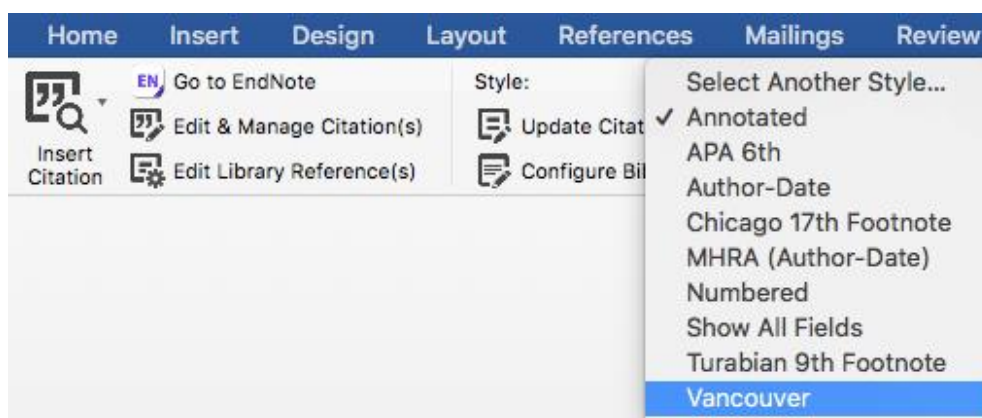

3. Go into **Select Another Style** if the style you need is not in the "favourites" list and choose the required style.
4. Your document will now update to the new style.

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.
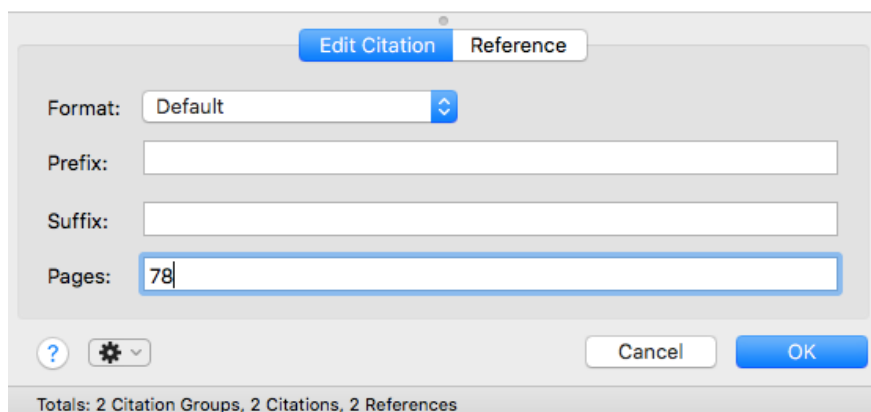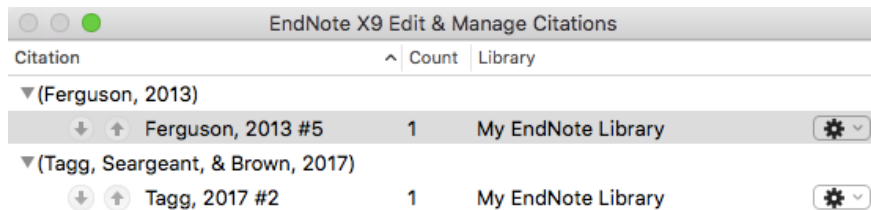

2. Click on the **EndNote X9** tab in **Word** and then click on the **Edit & Manage Citation(s)** icon.
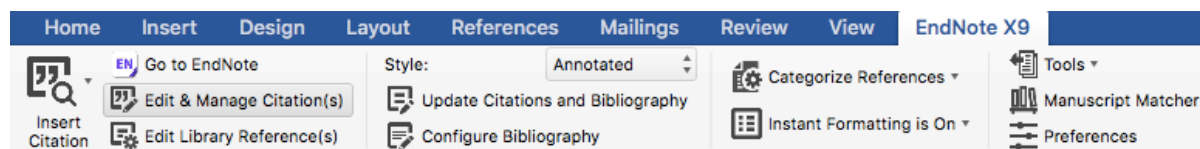
3. The **Edit & Manage Citations** box will appear. Make sure the citation to which you want add page numbers is highlighted. In the **Pages** box, type in the page numbers. The **Suffix** box can also be used.
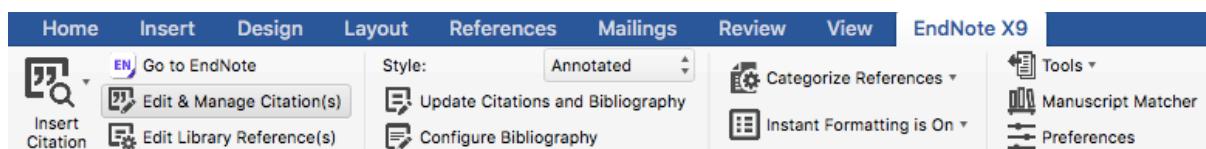
4. The page number will now appear in the in-text citation eg. (Parmet, Lynm, & Glass, 2008, p.23). Repeat these steps for adding other page numbers.

DELETING IN-TEXT CITATIONS:

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

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

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

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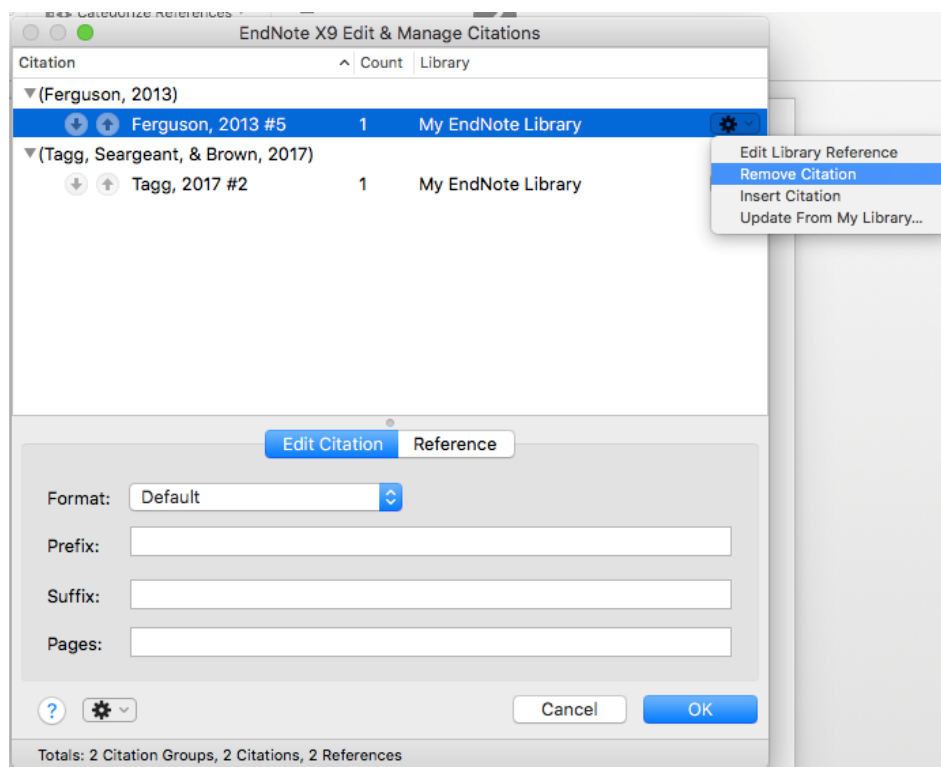
4. The in-text citation will now be removed.
5. If it is the only use of that reference as an in-text citation, it will be removed from the reference list at the end of the document. However, if it has been used elsewhere in the document, it will remain in the reference list.

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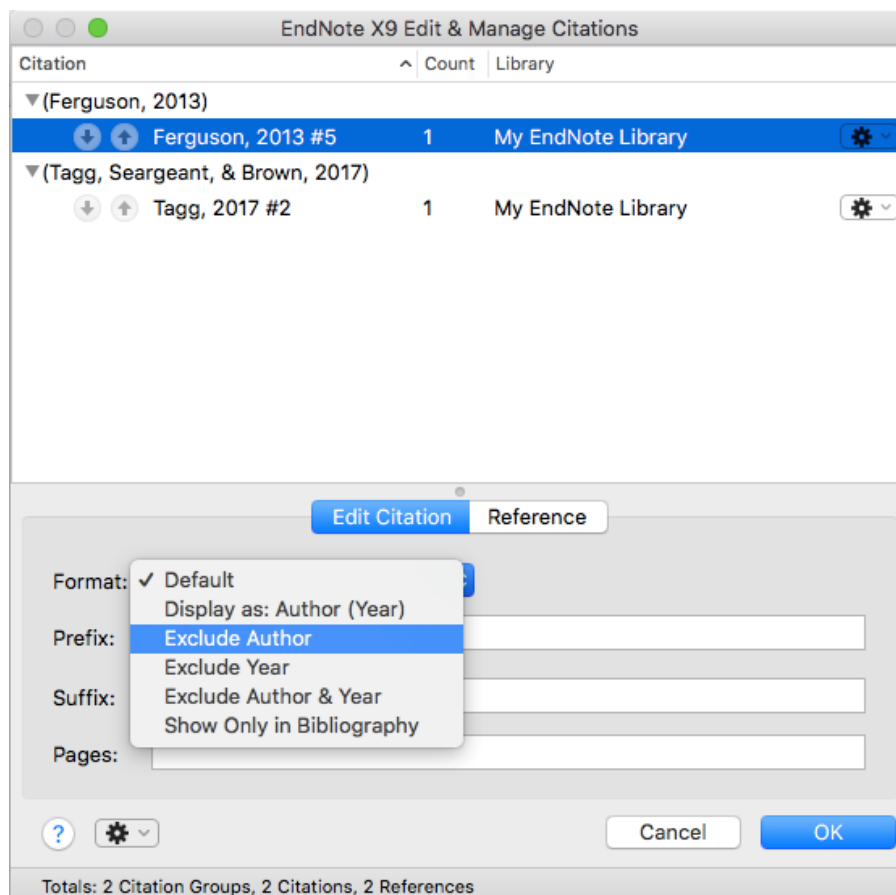
4. The author will be removed from the citation but the year will remain. Other instances of the citation won't be affected nor will the reference list.


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

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.
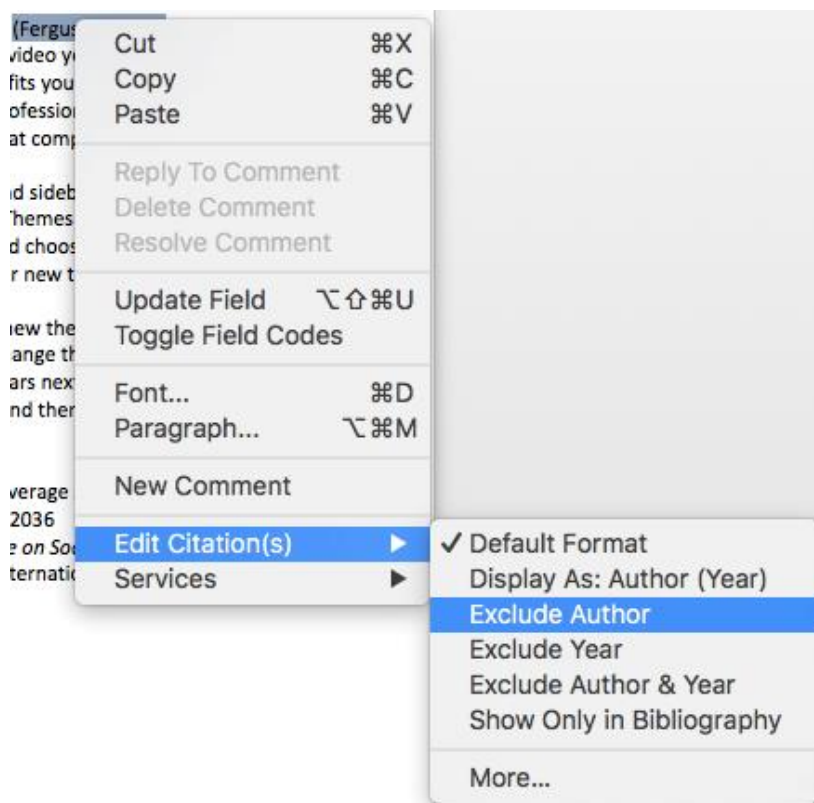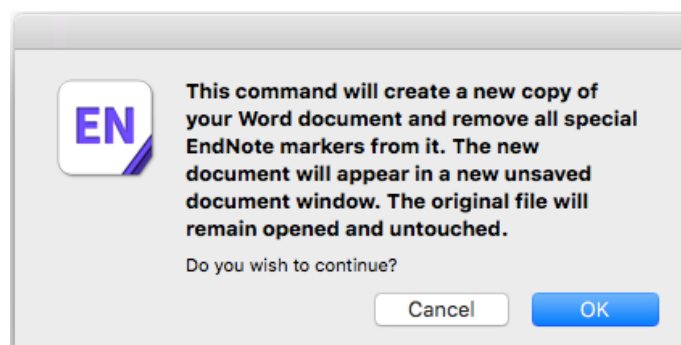
CONVERTING TO PLAIN TEXT:

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.
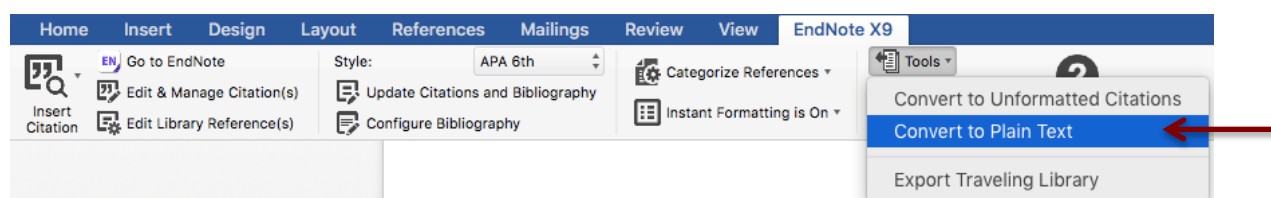

3.   A message box will appear explaining it will create a copy that is plain text while keeping the EndNote linked version.

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.**

1. Have your EndNote Library open. Click on **File > Save A Copy**.
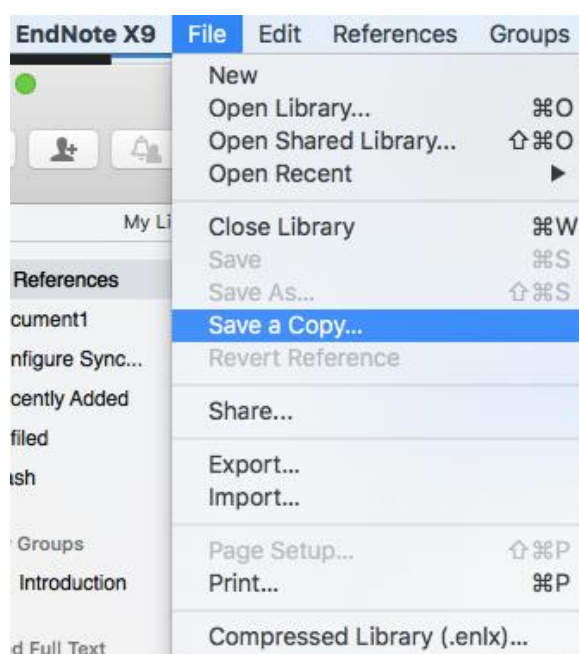
2. Give your copied library a name or accept the default (which is the name of your original library file with Copy at the end eg. My EndNote Library Copy). Choose where to save it.

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