



EndNote™ X9

QuickStart Guide for Mac

May 2019



What can I do with EndNote?

- ✓ Create a library of all your references, including importing from library databases.
- ✓ Attach PDFs, sound, video and other files to your references.
- ✓ Insert your references into Microsoft Word or Apple Pages documents and automatically format your citations and bibliography in your preferred style, as you type.
- ✓ Group references by project, course, or other categories.
- ✓ Synchronise your EndNote library across multiple computers, or access it online by creating an online account at my.endnote.com.
- ✓ Use EndNote with your iPad - The EndNote iPad App is available on the App Store.
- ✓ Share libraries with other EndNote users


Download EndNote X9 from the Massey Library website

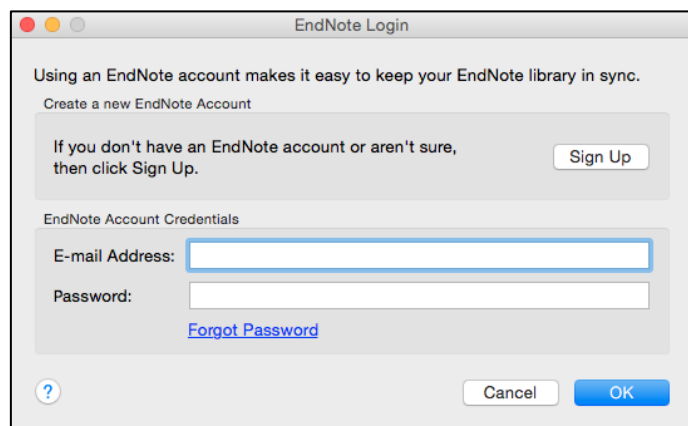
<http://www.massey.ac.nz/?ea2525342e>

Uninstall any earlier versions of EndNote manually before installing X9. Visit the link above for installation tips and to install the Massey Profile Installer – recommended after any EndNote software updates.

Your Library – access it anywhere

EndNote automatically creates your library for you. **Use one library only** for all your references. You can automatically sync your computer, iPad and online EndNote account so that all your references, attachments and notes are accessible everywhere. You can also synchronise your library across different computers.

Click Sync Library  to set up an online account and set up synchronisation, or log in with a Web of Science account or existing EndNote account if you have one.

The image shows a screenshot of the 'EndNote Login' dialog box. At the top, it says 'EndNote Login'. Below that, it states 'Using an EndNote account makes it easy to keep your EndNote library in sync.' and 'Create a new EndNote Account'. There is a section with the text 'If you don't have an EndNote account or aren't sure, then click Sign Up.' and a 'Sign Up' button. Below this is the 'EndNote Account Credentials' section, which has fields for 'E-mail Address:' and 'Password:'. There is a 'Forgot Password' link below the password field. At the bottom left is a help icon (a question mark in a circle), and at the bottom right are 'Cancel' and 'OK' buttons.

To access EndNote online go to myendnoteweb.com

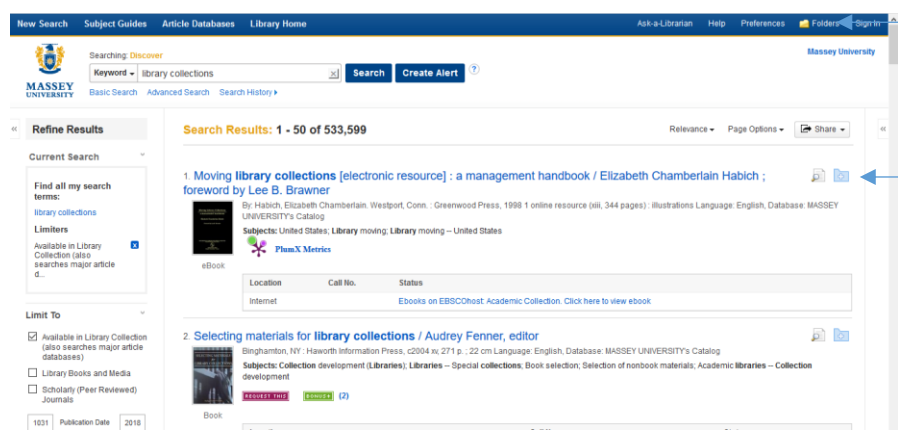
For iPad download the iPad app from the App Store. The online and iPad versions have limited functionality so we recommend working mostly with the desktop version.

Create your library

1. Import references from a database

Online databases allow you to export references to your EndNote Library, one by one or in a batch. Firefox and Chrome are the browsers that work best with EndNote on Mac.

Discover/EBSCOhost Databases



The screenshot shows the Massey University Discover database interface. The search results for 'Moving library collections' are displayed. The first result is 'Moving library collections [electronic resource] : a management handbook / Elizabeth Chamberlain Habich ; foreword by Lee B. Brawner'. The second result is 'Selecting materials for library collections / Audrey Fenner, editor'. The interface includes a search bar, navigation tabs, and a list of results with checkboxes for selection.

Find these saved results in **Folders**.

Click the folder icon next to the record you want to reference.
(or **Share** to add all the results from a page)

To export individual references **select** the checkbox. Do nothing to export all.

Export all or selected references.

Next, **Save** in RIS format. Always **Open** (never save) EndNote files. EndNote will open with your references.

Other Databases - Instructions for more databases are in the **Introductory EndNote PDF**.

Find it here: <http://www.massey.ac.nz/?ea2525342e>

HOT TIP! – Check references for errors

The quality of imported references varies between databases. Look at the references in EndNote, you may need to edit them.

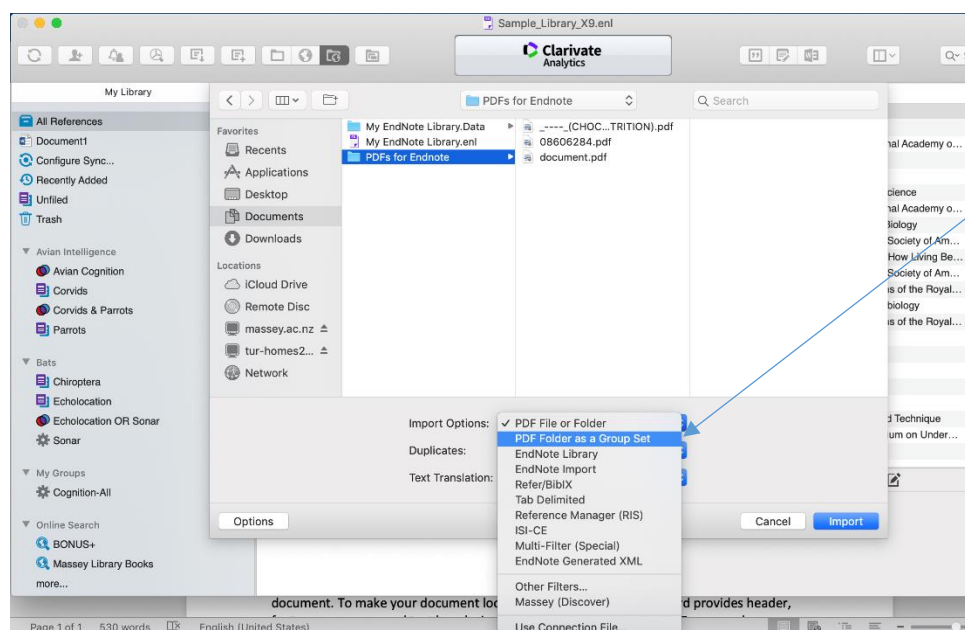
- Data appears in the correct fields?
- Correct formatting of the title (capitalisation)?
- Correct reference type selected?
- Spaces between author initials?

APA interactive creates customised examples of APA references and in-text citations for you to compare: <http://owll.massey.ac.nz/referencing/apa-interactive.php>

2. Import existing full text PDFs stored on your computer.

File>Import

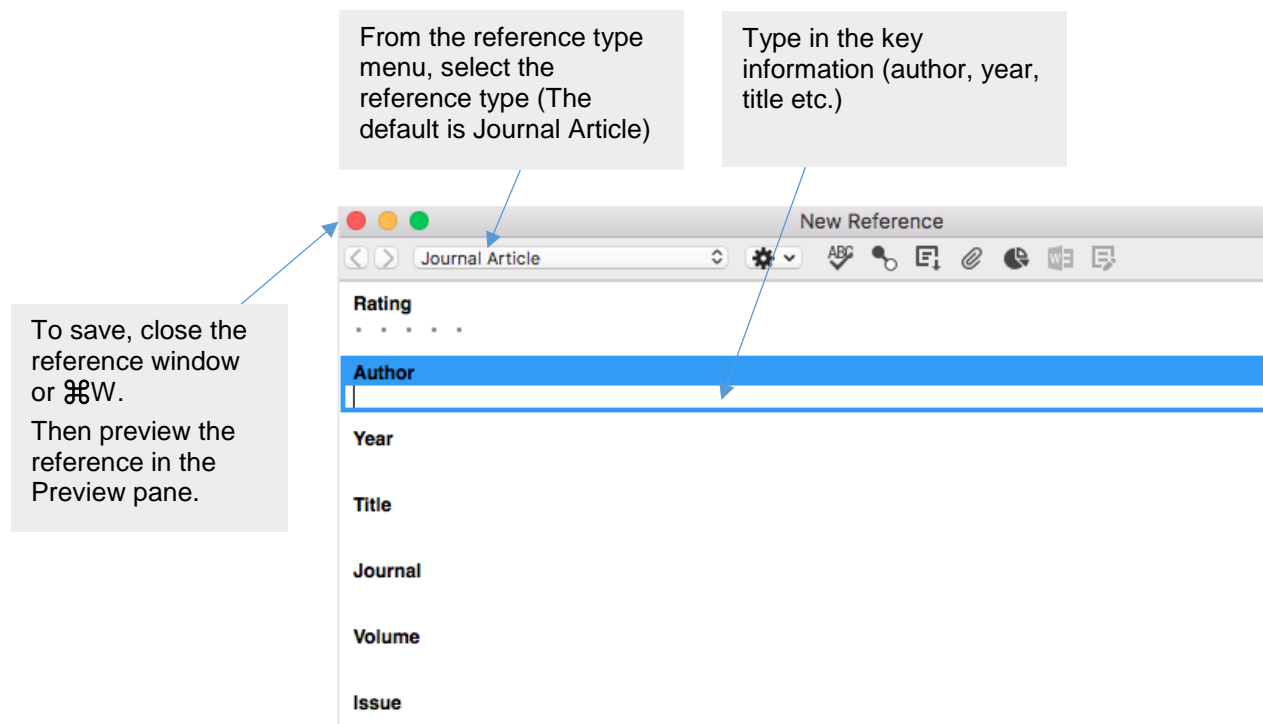
Choose a single PDF, or a folder of PDFs.



3. Manually add references to your library


If you can't import a reference you can add it manually.

References>New Reference



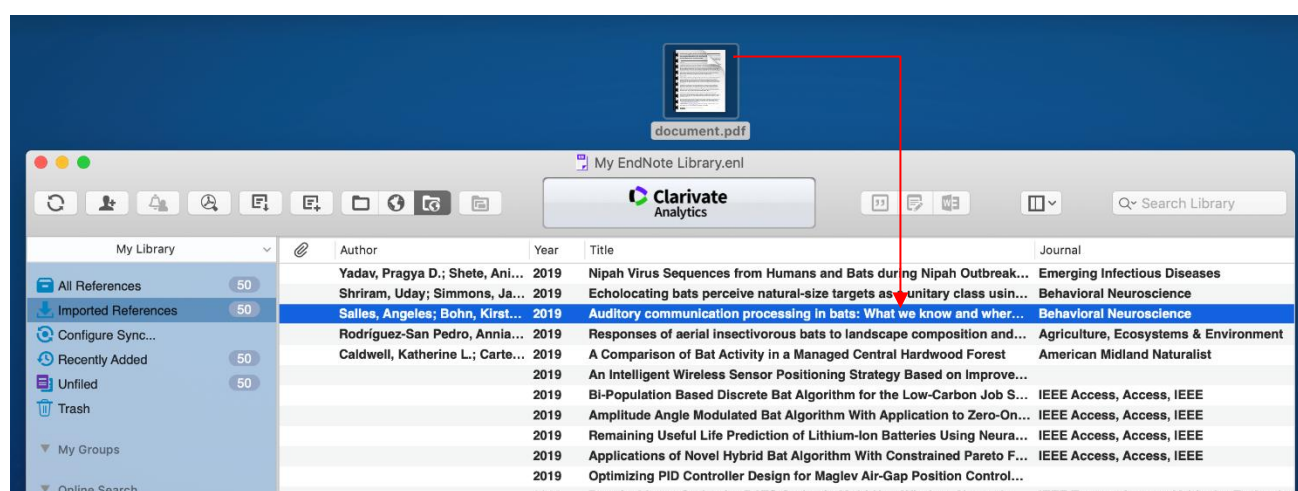
Linking PDFs to references

Find Full text PDFs for references

EndNote will search online for Full text PDFs to attach to references. Select the reference(s) and click the **Find Full Text** icon , or right-click > **Find Full Text**

Manually linking a PDF file to a reference

To add a PDF from your computer to an existing reference in your library, drag and drop the PDF file onto the reference in EndNote.

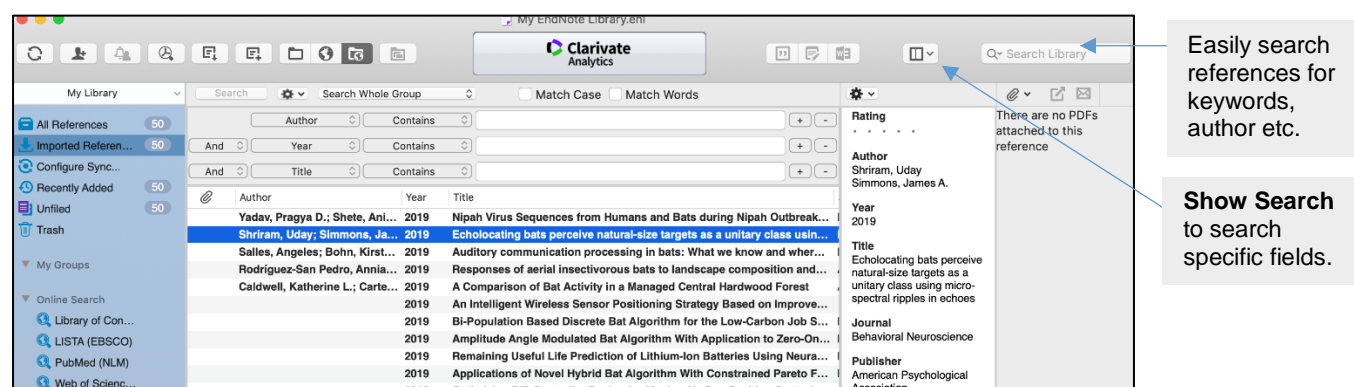


Working in your EndNote Library

Add useful notes to your references

Use the Notes, Keyword or Label fields in any full EndNote record to add your own annotations (these will not appear in the reference output style).

Searching your library



Cite While You Write (CWYW) with Microsoft Word

Word can import references from EndNote into documents. Insert citations while you are writing (CWYW), and a bibliography will be created automatically at the end of your document.

Set field shading in Word

Do this before you start working on your document. You will only need to do this once.

This function shades your EndNote citations to prevent accidental deletion. The shading will not print.

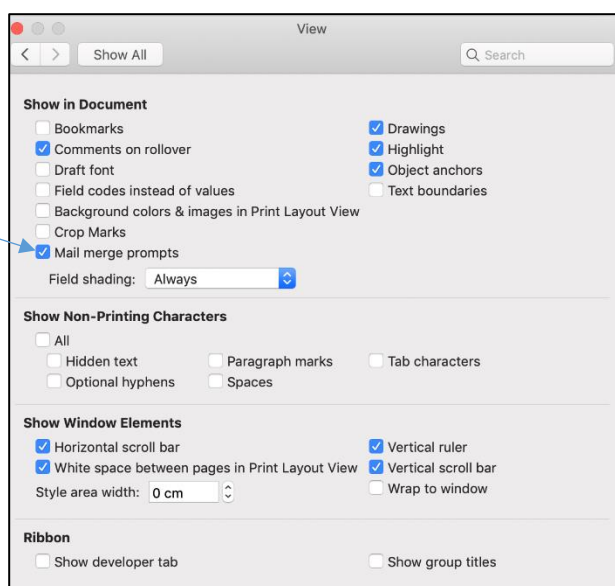
purity each). Each method was derived by evaluating combinations of three sporulation conditions, including freeze drying of inocula, heat shock treatment of cultures, and subsequent incubation at suboptimal temperatures that yielded the highest percentage of sporulation (Bricker & Tollison, 2011). Pure spore suspensions were characterized in terms of dipicolinic acid content, culturability, decimal reduction time (D) value for heat inactivation (100 degrees C) and hydrophobicity.

Bricker, J., & Tollison, S. (2011). Comparison of motivational interviewing with acceptance and commitment therapy: a conceptual and clinical review. *Behavioural and Cognitive Psychotherapy*, 39(5), 541-559. doi: 10.1017/S1352465810000901

In Word, open the **Preferences** menu

Select **View**

Set **Field Shading** to **Always**



Inserting Citations

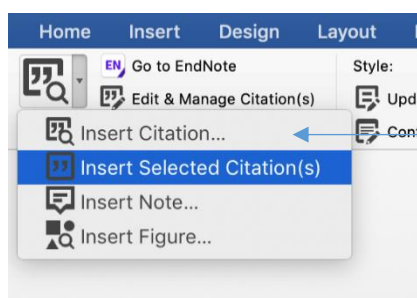
Place your cursor in the Word document where you want the citation to appear. In EndNote select the relevant reference (or select multiple by holding down **⌘**)

Option 1. In EndNote click **Insert Citation**  or...

Option 2.

...in Word, on the EndNote X9 tab click on

Insert Citation > Insert Selected Citation(s).



Option 3.

To insert a reference without going to EndNote first

Insert Citation > Insert Citation

Then search and insert from your EndNote Library

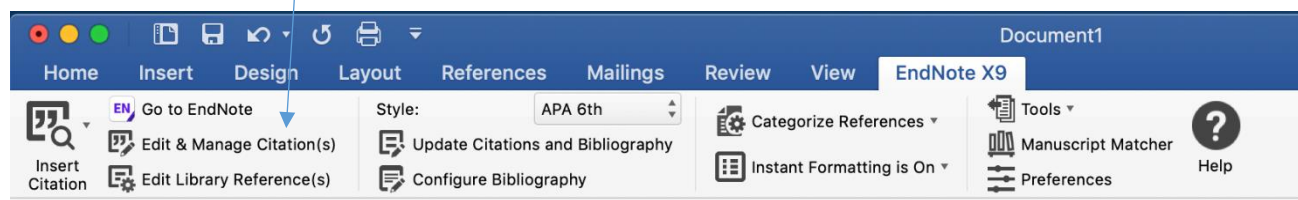
Editing and Deleting in-text citations

Never delete any information that came from Endnote using word commands ALWAYS use this method:

To edit an in-text citation use the EndNote 'Edit & Manage Citations' tool in Word.

In Word, place your cursor on the citation you want to edit.

Click **Edit & Manage Citation(s)**



To edit

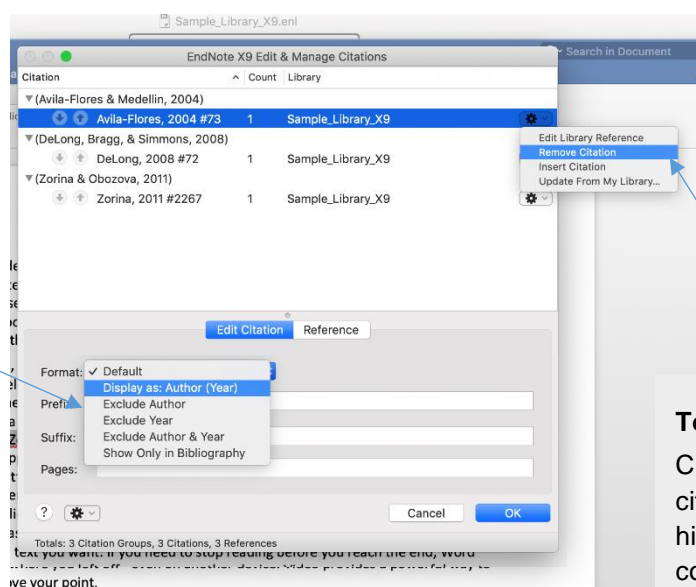
Check the correct citation is highlighted, add page number(s) or select other options as desired. Click **OK**

TIP:

Use 'exclude author' when you want the author's name outside brackets. Manually type the author name in your Word document.

e.g.

Hill (2012) found that people had difficulty...

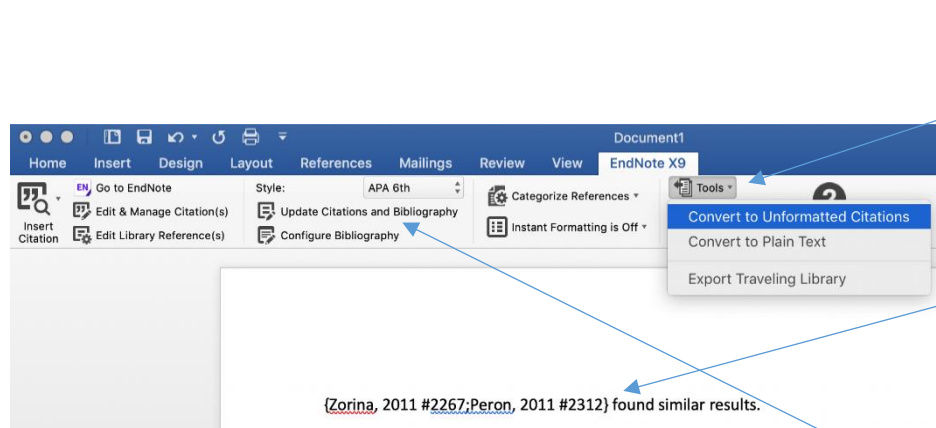


To delete

Check the correct citation is highlighted, Click the cog icon and **Remove Citation**

Deleting or Moving Multiple References

In Word, highlight the text you wish to delete or move (or select nothing to do the whole document).



Unformat the citations by selecting

Tools >

Convert to Unformatted Citations.

This reveals the EndNote code to ensure you move or delete everything. Delete or move the entire block of text (including the citations).

Click on **Update Citations and Bibliography** to reformat your bibliography.

Further help

Visit Massey Library's Endnote webpage <http://www.massey.ac.nz/?ea2525342e>

- QuickStart Video tutorial
- In-depth Introduction to EndNote PDF
- Register for an Endnote class (face-to-face or online)
- FAQs
- EndNote@Massey Blog

MASSEY UNIVERSITY
TE KUNENGA KI PŪREHURUA
UNIVERSITY OF NEW ZEALAND

Search Massey

Home > Research > Library > Help and Instruction > Referencing Software and EndNote > EndNote Referencing Software

EndNote

EndNote software stores and manages references.

Download EndNote

By downloading EndNote you agree that Endnote will be installed for the purpose of Massey-related work or study and will not be installed on more than 3 computers per download.

Windows PC Version (X9)

- Personally owned computers
- Massey owned computers

NOTE: Versions X8 or older must be manually uninstalled.

Mac Version (X8)

- Mac Installer
- Installation tips for Mac users

NOTE: Manually uninstall any previous EndNote versions.

Log in: with your student or staff Massey network login.

EndNote Classes

All Massey Libraries provide regular face-to-face and online EndNote workshops. Note: Distance students can also book for an on-campus session.

[SELECT YOUR ENDNOTE CLASS & REGISTER HERE](#)

Support and Help

Massey-specific Help:

- Quick Start Guide [\[know.mh.massey.ac.nz\]](#)
- QuickStart Guide (1,202 KB)
- QuickStart Guide for Mac (1,236 KB) (X8)
- Introductory EndNote (3,123 KB)

[EndNote@Massey Blog](#)
[EndNote@Massey FAQs](#)
[Referencing Information](#)
[Still need help? Contact Us](#)

Massey Profile Installer

Download and run the installer after any EndNote software updates to keep up-to-date and minimise errors.

- Windows PC Version
- Mac Version (requires computer restart)
- More help

Close EndNote before running the profiler to ensure settings install correctly. NOTE: If your EndNote version is X7 or older you must update to X8 in order to continue to receive Massey Profile support.

EndNote is Massey's preferred reference management software; with it you can:

- create, import, manage and search references
- download and manage full text
- insert citations into Microsoft Word documents
- create bibliographies in a variety of bibliographic styles

EndNote@Massey

[EndNote X9](#)

[Install Instructions for EndNote on Massey Machines \(Windows PC\)](#)

[Adjusting Author View in a List of References](#)

[EndNote and Office 365](#)

[Repairing Corrupt Libraries](#)

[Journal Titles That Can't Be Changed](#)

[Sharing Libraries With Other Users](#)

[How Do I Set Endnote To Permanently Open My Library?](#)

[Massey Profile Installer](#)

[What Do I Do With Conference Papers?](#)

[How Do I Edit Reports In APA 6th Style?](#)

[Slow Citation Insertion](#)

[How Do I Move A Library Between Computers?](#)

[How Do I Safely Remove, Move Or Modify Citations?](#)

[Why Do The Changes I Type Into My Citations/Bibliography Keep Disappearing?](#)

Syndicated feed [EndNote@Massey from http://masseyblogs.ac.nz/endnote](#)

Page authorised by University Librarian
Last updated on Friday 10 May 2019

Contact a librarian:

Phone 0800 MASSEY (0800 627 739) and ask for the Library

Email library@massey.ac.nz