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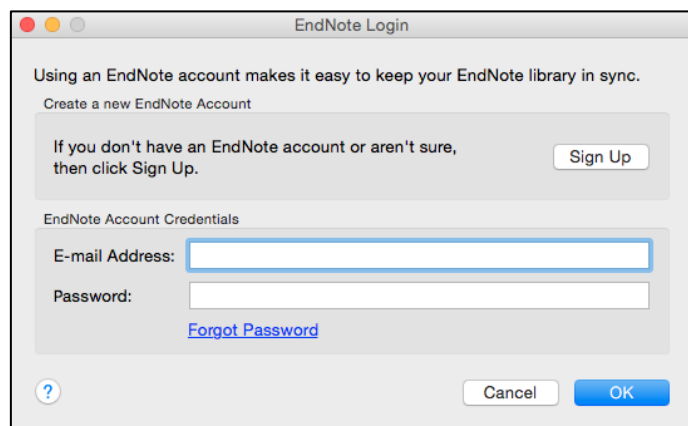
http://www.massey.ac.nz/?ea2525342e

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.

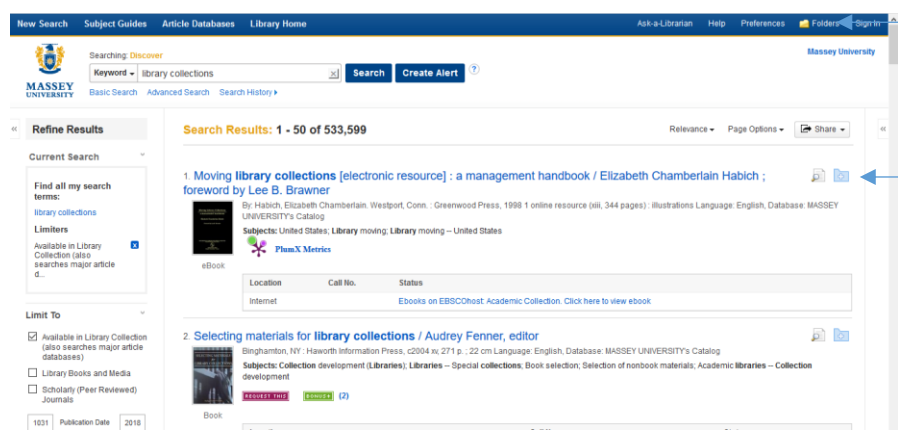To access EndNote online go to myendnoteweb.com

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

Click the folder icon next to the record you want to reference.

(or **Share** to add all the results from a page)

Find these saved results in **Folders.**

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
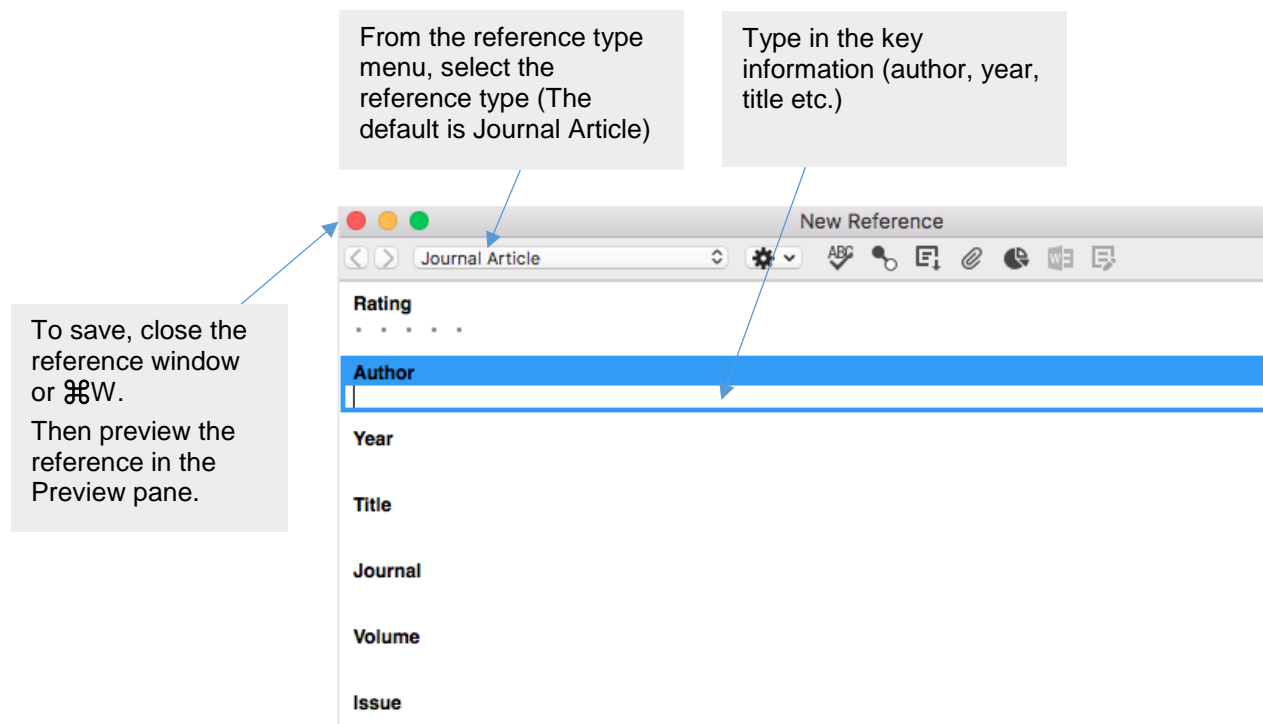Choose a single PDF, or a folder of PDFs.

Create groups automatically when you import a folder of PDFs.
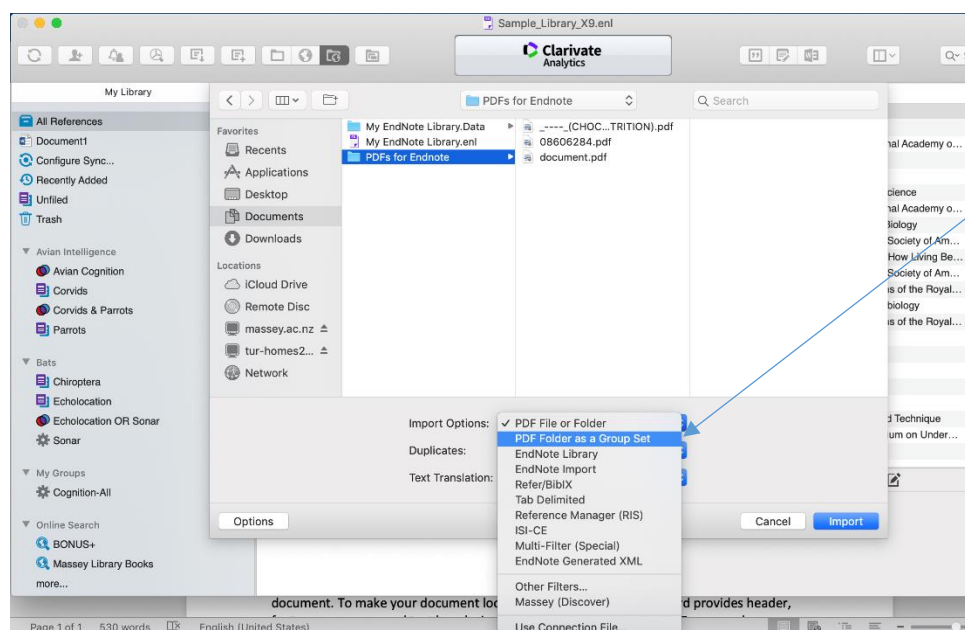
3. Manually add references to your library

If you can't import a reference you can add it manually.
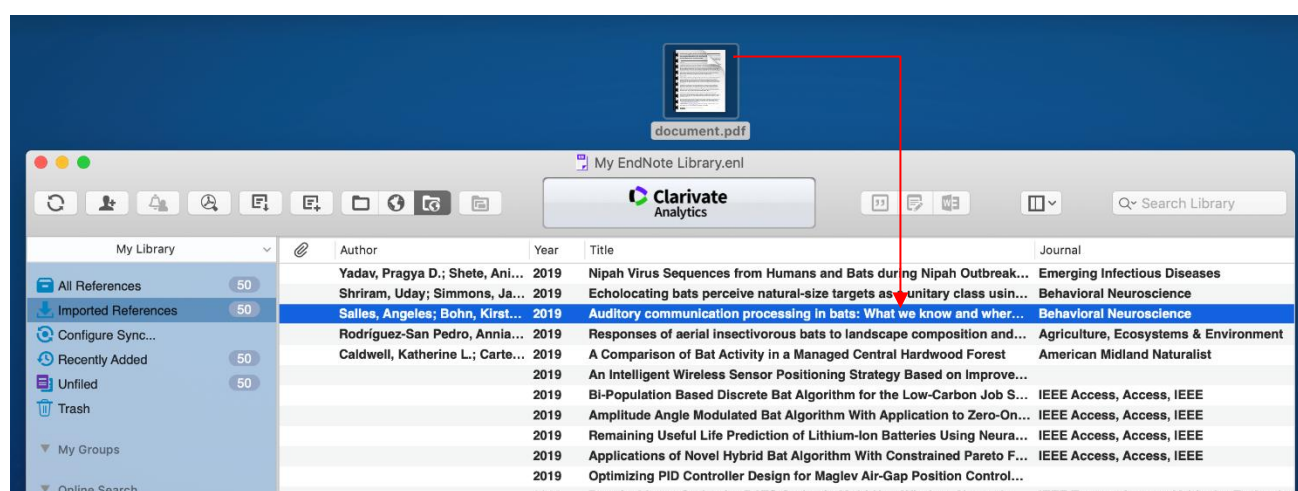**References**>**New Reference**

From the reference type menu, select the reference type (The default is Journal Article)

Type in the key information (author, year, title etc.)

To save, close the reference window or ⌘W.
Then preview the reference in the Preview pane.

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.
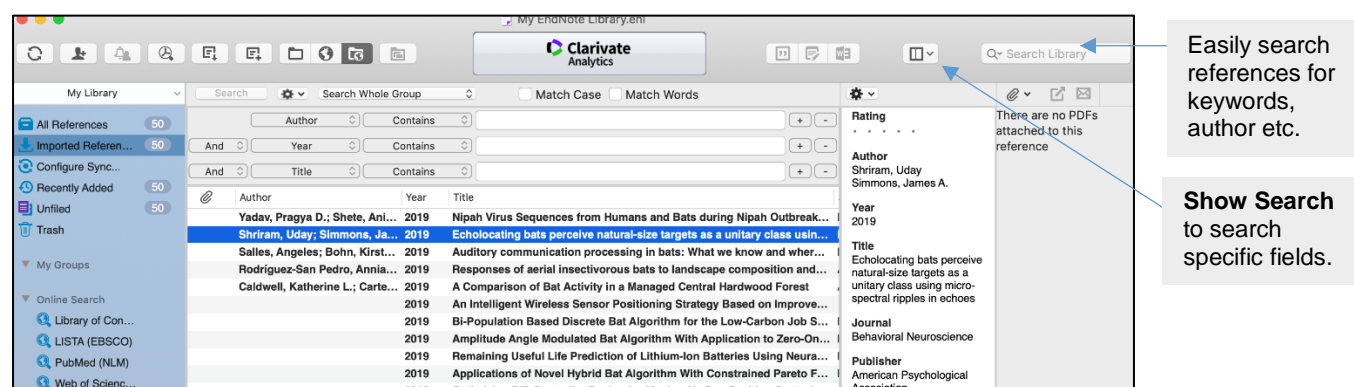

Working in your EndNote Library

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.

In Word, open the **Preferences** menu

Select **View**

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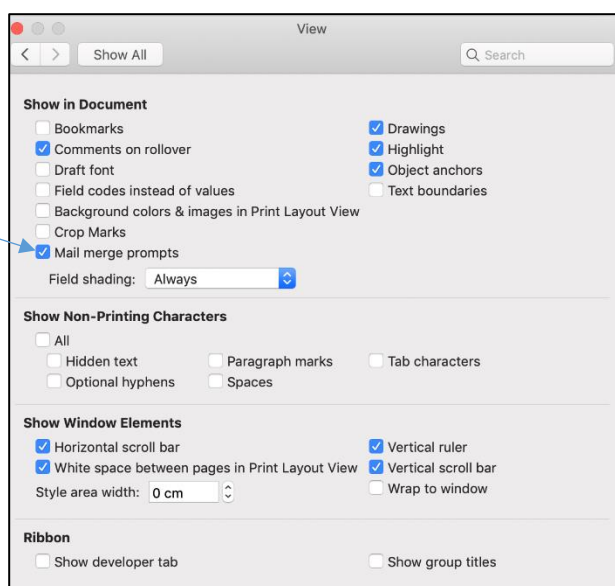
Inserting Citations
Place your cursor in the Word document where you want the citation to appear. In EndNote select the relevant reference (or select multiple by holding down ⌘)

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).
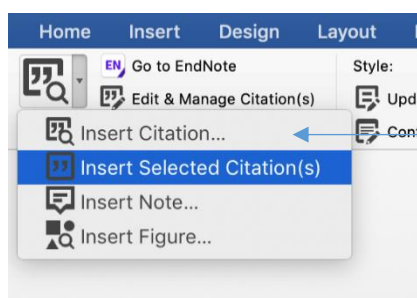
Option 3.

To insert a reference without going to EndNote first

Insert Citation > Insert Citation

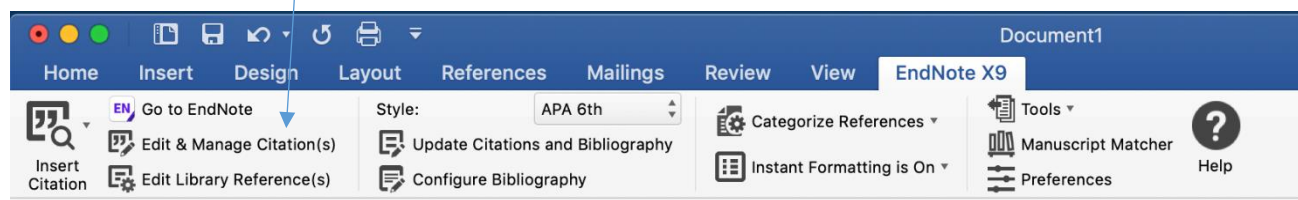Then search and insert from your EndNote Library

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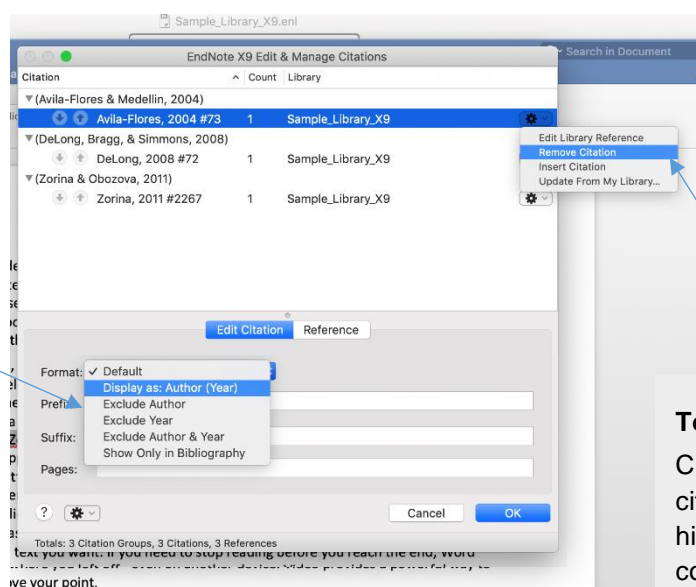
Click **Edit & Manage Citation(s)**

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).
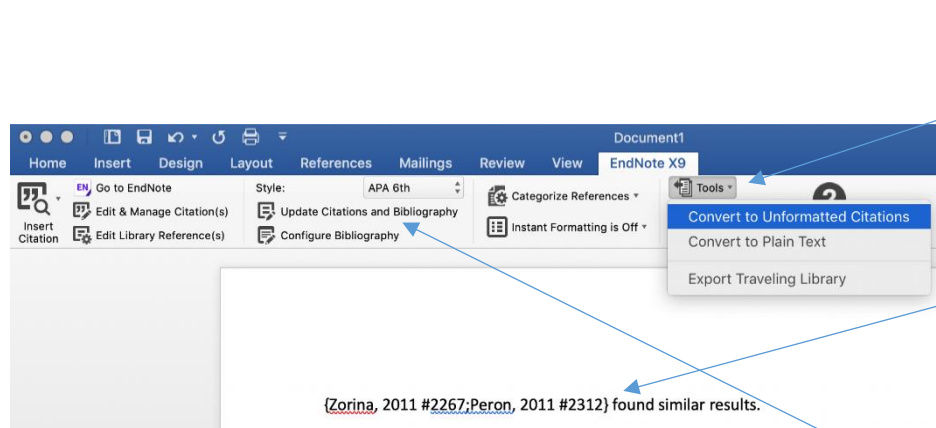
Unformat the citations by selecting

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

Contact a librarian:
Phone 0800 MASSEY (0800 627 739) and ask for the Library
Email library@massey.ac.nz