

Specialist Library Support

Introduction to EndNote 20 for Macintosh (MacOS)

Should you require this workbook in a digital format please contact us at uml.teachingandlearning@manchester.ac.uk

Sign up to Endnote online

Sign up for an Endnote online via the following link:

<https://manchester.idm.oclc.org/login?url=https://access.clarivate.com/login?app=endnote>

You will need to authenticate using the University of Manchester login service username and password. Register for an account using your University of Manchester email address. By using your University of Manchester email address, you gain more storage space for your references and access to more bibliographic styles. You will need to register to keep your EndNote online and desktop libraries synchronised. Sign up for an Endnote online account with your University of Manchester email address. By using your University of Manchester email address, you gain more storage space for your references and access to more bibliographic styles. You will need to register to keep your EndNote online and desktop libraries synchronised.

Open a new Library in a Macintosh (macOS)

- 1) Click on the Finder icon in the bottom left-hand corner – go to applications and find the Endnote folder.
- 2) Open the folder and double click on the Endnote icon.
- 3) Click on 'File' and select 'New' in EndNote menu.
- 4) Give the library a name and save it to Documents or your preferred place.
- 5) Open the Safari/Chrome browser for the rest of the session.




Adding references to your Library

Direct export from Web of Science



- 1) Go to the Library homepage - www.manchester.ac.uk/library
- 2) Choose the 'Search Resources' Tab in the page ribbon
- 3) Select 'Search Databases', then select 'W'
- 4) Click on the Web of science link Under 'Find online' select [Web of Science](http://www.webofscience.com)
- 5) For off campus access login to the service using your University credentials
- 6) Leave database default 'Web of Science™ Core Collection'
- 7) Run a keyword search on a topic of your choice example given oil spill*
- 8) Mark a few records to save and click on **Export...** tab and choose **EndNote Desktop**.
- 9) Select what level of detail you want to export (Author, Title, Source, Abstract etc...) and click **Export**
- 10) On Mac it may ask you to access your downloads folder, select **Allow**.
- 11) Now go to your Downloads and double click on the file you have just downloaded, it should be called 'savedrecs.ciw' or reorder files by date to find the latest downloaded.

Note: The records will be automatically added to your All References folder and will also be listed in the Imported References folder. Please note this may take up to a minute if your connection is slow.

Direct export from ProQuest

- 1) Go to the Library homepage - www.manchester.ac.uk/library
- 2) Choose the 'Search Resources' Tab
- 3) Select 'Search Databases', then find *ProQuest* under 'P' and ProQuest under 'Find online'
- 4) Run a keyword search on a topic
- 5) Select a few records to export
- 6) Select the elipsis icon: 
- 7) Choose the option for:  'RIS (EndNote, Citavi, etc.)'
- 8) To complete the export select .
- 9) On Mac it may ask you to access your downloads folder, select **Allow**.
- 10) Now go to your Downloads and double click on the file you have just downloaded, it should be called 'ProQuestDocuments-[Date].ris' or reorder files by date to find the latest downloaded.




Direct export from Google Scholar

- 1) Click on the  icon on the left hand side.
- 2) Choose the  **Settings** option.
- 3) Scroll down to the **Bibliography Manager** options
- 4) Click on **Show links to import citations into** and change the drop-down option from 'BibTex' to 'EndNote'

When you return to your Google Scholar and carry out a search you will see the **Import into EndNote** link under each result. Click on the **Import into EndNote** to save to your Downloads and click on the downloaded file as in previous examples (scholar.enw).

Note: If you have a google account you can save multiple results to your 'My library' and export references *en masse*.

Direct export from Library Search


- 1) Go to the Library homepage: <http://www.manchester.ac.uk/library>
- 2) Perform a search
- 3) To add multiple items use the drawing pin icon  to 'add this item'
- 4) Once completed click on the large drawing pin icon  at the top of the page a'Go to my favourites'
- 5) Select the records from your list and select the elipsis  "Show actions options" icon



- 6) You can then see a list of actions, select the **Export RIS** and select download (there is no need to change the encoding)
- 7) Double click on the downloaded file (Primo_RIS_Export.ris) to export into EndNote.




Adding a new reference manually

In your EndNote library, click the **New Reference** icon  or select **References > New Reference** or **[cmd+N]**

'Journal Article' is set as default in the dropdown menu options; enter the details of the following article:

Author: Hookway, N, Jones, R
Year: 2008
Title: 'Entering the blogosphere': some strategies for using blogs in social research.
Journal: Qualitative Research
Volume: 8
Issue: 1
Pages: 91-113

To save the record, **click** the red '**dot**'  at the top left of the screen to close the reference window you will be asked to save changes to the record select **save**.

Note:

If there are multiple authors, you should add each one on a separate line as above. Institutional authors such as government departments, NGOs and companies should be entered with a comma at the end of their name e.g. **Department of Work and Pensions**,. This tells endnote to treat it as one phrase and not an author's surname and forenames.

Adding a PDF to a reference

EndNote has a function which enables it to search for the PDFs of full-text articles and attach them to your references automatically.

- 1) Highlight the references you want to find by using '**Ctrl**' + '**A**' on your keyboard to select all the records in your library.
- 2) Select **References > Find Full Text > Find Full Text ...**
- 3) You may then be required to login with your University credentials

EndNote will now search the internet for full-text versions of the selected references and if these are available and accessible will add them to your library. Please note it can only search up to 250 records at a time so if you have a large library you may wish to do this in stages or by group.

Three potential outcomes:

- ➔ Available PDFs will show up in the **Found PDF** list.
- ➔ If a PDF is available on the internet but cannot be downloaded automatically, EndNote will display an entry in the **Found URL** list.
- ➔ Where EndNote cannot locate a PDF it will display the reference in the **Not Found** list.

You can also link PDFs you have downloaded yourself to the corresponding record in EndNote:

- 1) Select an EndNote record, right click on the record and select **edit reference**
- 2) Select the **+ Attach file** button and locate the PDF article from your documents
- 3) Select **Open** to link the file to its EndNote record and **save** the changes by selecting a different record and following the prompt.

Organising your references

Finding and removing duplicate references

It is essential to only have unique references in your Library, Endnote can help you accomplish this (if you have any).

- 4) From the EndNote toolbar, select **Library**.
- 5) Next select **Find Duplicates**.
- 6) View duplicate references in the comparison panel.
- 7) Select **Keep this Record** to retain the version of the reference you want to save.

Creating Groups

You can manage your reference collection in EndNote by creating groups for specific topics, authors or journals.

- 1) In the EndNote toolbar select **Groups** then **Create Group**.
- 2) Give your new group a name and it will appear in the left hand menu under the heading **MY GROUPS**.
- 3) To add references to a group, you can drag and drop a reference across or select a group of references and drag them all into the group in one go. Alternatively, right click on a reference and choose **Add References To** then select the group.

Creating a Smart Group

- 1) In the EndNote toolbar select **Groups**, then select **Create Smart Group**.
- 2) Give your new group a name and then fill in the appropriate criteria for your smart search e.g., it could be a key author, specific journal, keywords etc

- 3) Each time you add a new reference to your EndNote Library those references that correspond to your Smart Group criteria will be added to your Smart Group.

Formatting your references

Inserting citations and references into Word

- 1) In Word, copy and paste the following lines of text into a new document:

“EndNote can make writing up your research and creating bibliographies much easier. You can add citations as you write and automatically insert the references into your document. There are thousands of different bibliographic styles available including Vancouver, Harvard, MLA and Nature.”

Alternatively, just type ‘=rand(3)’ and press ‘return’ this will auto-generate three paragraphs of text

- 2) Place the cursor at the end of the first paragraph.
- 3) In EndNote, Highlight the reference(s) you want.
- 4) Go to the ‘Tools’ menu and select ‘Cite While You Write (CWYW)’ followed by ‘Insert selected citation(s)’.

Repeat this process for the second and third paragraphs. EndNote will insert the citations and create a full reference list at the end of your document.

Alternatively, you can go to Word via the EndNote tab

- 1) Select the ‘Insert Citation’ icon and a search box will appear where you can type anything that appears in your reference library such as author name, title etc.
- 2) Select the reference and then ‘Insert’ from the search box.

Changing the reference style in Word

- 1) In Word select the ‘EndNote 20’ tab from the ribbon.
- 2) In the Bibliography section choose your referencing style from the styles drop down.

If your style isn’t there in the drop-down list:

- 1) Choose ‘Select another style...’ from the options. A fuller list of options will now be displayed for you to choose from.
- 2) Select the style you wish to use and click ‘OK’.

Creating a standalone bibliography in Word

In EndNote, you can select the bibliographic style you want to use from the drop-down options. You can preview the references as they will display at the bottom of the window.

- 1) In EndNote select several records by holding down the **'Ctrl'** key and highlighting them or **'Ctrl'** and **'A'** on your keyboard to select all the records in your library.
- 2) In EndNote, select **'References'** then **'Copy Formatted Reference'**.
- 3) In Word, open a new document for your bibliography and select **'Paste'** from the home menu using the **'Paste and Match Formatting'** option.

This will copy the records into Word in the chosen style as a plain text file.

Tip: To save time sort the records alphabetically by author before you edit and paste.

Formatting References in Word

To change the bibliographical style of your references follow the steps below:

- 1) In Endnote select **'Tools'** then **'Cite While You Write'** [CWYW].
- 2) Next select **'Format bibliography...'**.
- 3) From the **'With Output Style'** menu displayed select your referencing style e.g. Harvard Manchester. If your not sure on which style you should be using please check your marking criteria.
- 4) If your style isn't in the default menu click **'Browse'** to see a full list of referencing styles and choose the appropriate one.

Tip: You can jump to the option you want e.g., Vancouver by starting to type the name.

Alternatively in word select the Endnote 20 tab and use the drop-down menu in the **'Style:'** box option.

Editing citations

You can modify the appearance of in-text citations (e.g., exclude Author or Year or add page numbers) using the command in the **'Edit & Manage Citation(s)'** in the EndNote 20 tab.

- 1) To add page references to a citation, highlight the citation you want to edit and click **'Edit & Manage Citation(s)'**.
- 2) In the **'Suffix'** field, enter the text as you would like it to appear e.g. '[space] pp.29-36'
- 3) Click **OK** to insert the suffix information into the citation.

To remove the author or year from an in-text citation where you have already referred to it directly in your text e.g., “as Goldacre argues (2008)...”

- 1) Highlight the citation in Word and select **‘Edit & Manage Citation(s)’** in the EndNote X20 tab.
- 2) Select **‘Exclude Author’** or **‘Exclude Year’** in the **‘Format’** drop-down menu as required.

Inserting Footnotes

You can insert footnotes using Microsoft Word in conjunction with EndNote.

- 1) Place the cursor where you want your footnote to appear.
- 2) Select the references tab in Word and select the **‘Insert Footnote’** tab.
- 3) This will number your footnote and open the footnote field at the bottom of the page, alternatively use the key combination **[alt+cmd+F]**.
- 4) Now select the **‘EndNote 20’** tab in Word and select the **‘Insert Citation’** icon.
- 5) Select the citation you want and it will appear at the bottom of the page.

Further information and support

- **Referencing guide at the University of Manchester:**
<http://subjects.library.manchester.ac.uk/referencing>
- **Specialist Library Support referencing resources**
<https://www.escholar.manchester.ac.uk/learning-objects/sls/packages/referencing/>
- **From the EndNote Web homepage click on the “Training” tab for detailed help.**
<http://endnote.com/product-details/basic>
- **University Library Guidance on EndNote Online:**
<https://subjects.library.manchester.ac.uk/referencing/endnoteonline>
- **University Library Guidance on EndNote 20:**
<https://subjects.library.manchester.ac.uk/referencing/EndNote20>

Contacts

If you have any queries about this booklet or the services mentioned in it, please contact the University of Manchester Library Teaching and Learning Team via uml.teachingandlearning@manchester.ac.uk