



TE KUNENGA
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MĀTAURANGA
LIBRARY

EndNote™ 21 Guide

May 2024



Use EndNote to:

- Create a library of all your references
- Attach PDFs and other files to your references
- Insert your references into Microsoft Word or Apple Pages documents, and into Word Online and Google Docs with EndNote Web
- Automatically format your citations and bibliography in your preferred style
- Group or tag references by project, course, or other categories
- Access your library online
- Sync your EndNote library across multiple computers
- Share libraries, and groups of references with other EndNote users

The EndNote Library Interface

The screenshot displays the EndNote Library Interface with three main panels highlighted by colored boxes:

- Groups panel (purple box):** Located on the left, it shows the user's email (k.chisholm@massey.ac.nz), sync status, and a list of groups and tags. The 'MY GROUPS' section includes 'My Groups' (Business: 55, Business librari...: 11, textbooks: 8), 'New Zealand' (Māori: 16), 'MY TAGS' (AI: 1, Open Access: 3), 'FIND FULL TEXT', and 'GROUPS SHARED BY ...' (c.jeffrey@massey.ac..., f.junaid@massey.ac.n..., i.m.wenman@massey...).
- Reference List panel (green box):** The central area shows a search for 'chatgpt' and a list of 380 references. The selected reference is:

Recor...	Title	Author	URL
2213	Creative activism rese...		https://ezproxy.massey.ac
2214	Globalizing dissent : e...	Ghos...	https://ezproxy.massey.ac
2215	Politicizing creative ec...	Da C...	
2217	A Case Study and Ana...	Schla...	https://ezproxy.massey.ac
2218	Textbooks in Acade...	Fergu...	https://ezproxy.massey.ac
2219	Equitable student su...	Wim...	https://ezproxy.massey.ac
2229	Looking towards a b...	Pirgo...	
2231	Kaitiakitanga : A Maor...	Kawh...	
2232	How indigenous entre...	Admi...	http://doi.org/https://doi.
2233	Social entrepreneurshi...	Paul, ...	http://doi.org/https://doi.
2234	Māori Indigenous val...	Ada...	http://doi.org/https://doi.
2235	Does culture and soci...	Denni...	http://doi.org/https://doi.
- Summary and preview panel (blue box):** On the right, it shows the selected reference details: '..., 2016 #... Summary', '+ Attach file', 'Textbooks in Academic Libraries', 'C. L. Ferguson', 'Serials Review 2016 Vol. 42 Issue 3 Pages 252-258', 'Accession Number: 118114443 DOI: 10.1080/00987913.2016.1207480', and a preview of the citation: 'Ferguson, C. L. (2016). Textbooks in Academic Libraries. *Serials Review*, 42(3), 252-258. <https://doi.org/10.1080/00987913.2016.1207480>'.

Groups panel. Shows default groups and any groups or tags you have set up.

Reference List panel. Shows all the references in the chosen group. Display fields can be personalised under **Edit/Preferences**.

Summary and preview panel. Use the **Edit** tab to make changes and corrections. The preview shows the reference in the chosen style. This panel can be set to display horizontally or vertically using the cog icon top right.

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Getting started with EndNote

Download EndNote 21 from the Massey Library website

Go to <https://www.massey.ac.nz/study/library/referencing-software-and-tools/download-and-use-endnote/> and follow the instructions.

Create and save your Library

On a PC, the first time you open EndNote you will see an empty grey screen. On a Mac, only the software menu bar will be visible.

Choose **File > New** to create your first library. Use one library only for all your references. Save your EndNote library to a local drive like your desktop. **Do not save to a cloud-syncing folder such as Dropbox, OneDrive, Box, SugarSync, etc.** Cloud-syncing folders corrupt EndNote libraries over time.

Instead EndNote has its own cloud system <https://web.endnote.com> which allows you to synchronise your library across different computers, have a back-up in the cloud, and make your EndNote library accessible everywhere.

Set up sync

In EndNote desktop, click on to **Library > Sync**. In the EndNote log-in box click **Sign up** and follow the instructions.

The online version has less functionality so we recommend working mostly with the desktop version when exporting references or working with Cite While You Write.

Backing Up Your Library

We do recommend you do manual backups of your Library as well.

EndNote allows you to save your complete Library to a single compressed file (.enlx) which includes the Library (.enl file) along with its accompanying data folder (.data). Saving this way minimises the danger of losing your PDF links and other problems.

To save a compressed Library file:

1. Go to **File/Compressed Library**.
2. Select what you want to save (the default saves the whole library) and click **Next**.
3. Choose where you want to save it to.

Clicking on the .enlx file will open EndNote and recreate the .enl library file and .Data folder.

Adding references to your library

Import references from a database

Online databases allow you to export references to your EndNote Library, one by one or in a batch.

Records will initially appear in an **Imported Reference** group. This is useful for correcting errors and adding full-text.

The quality of the imported results varies between databases. You will need to check the references in EndNote, and you may need to edit them. Look out for:

- data appearing in incorrect fields
- incorrect formatting of the title field (e.g. capitalisation)
- incorrect reference type selected
- unwanted information displayed

OWLL shows customised examples of APA, Chicago, and MLA references and in-text citations for you to compare at

- <http://owll.massey.ac.nz/referencing/apa-interactive.php>
- <https://owll.massey.ac.nz/referencing/chicago-interactive.php>
- <https://owll.massey.ac.nz/referencing/mla-interactive.php>

Internet browser compatibility

Mozilla Firefox performs best, followed by Google Chrome or Edge. You may be unable to direct export using Safari or other browsers.

The file with the exported references may automatically open with EndNote. Or it may go into your downloads and you will need to open it from there. The file will have the extension .ris.

Set EndNote to always open .ris files

In Windows

1. In your downloads, right-click on the .ris file.
2. Select **Open with**.
3. Click on **Choose another app**.
4. Select **EndNote**.
5. Click on **More apps** if you cannot see EndNote in Step 4.
6. Check the box of **Always use this app to open .ris file**.
7. Click on **OK**.

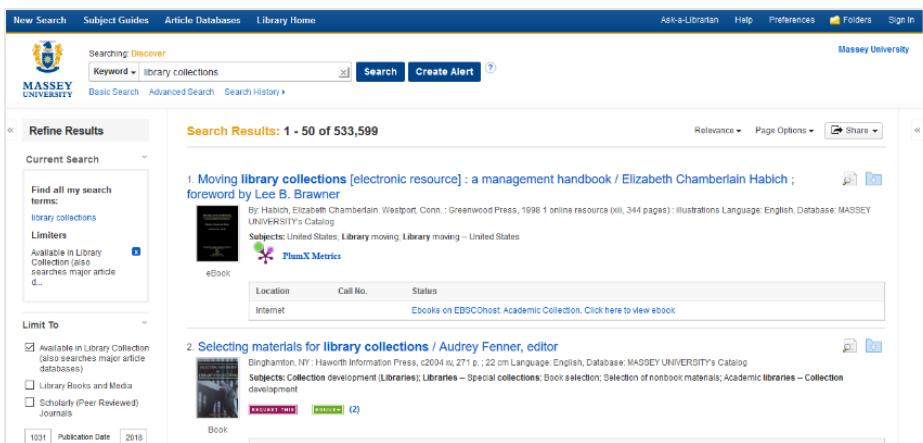
In Macs:

1. In your downloads, right-click on the .ris file..
2. Select **Get Info**.
3. Select EndNote 21. If you cannot see EndNote 21, click on **Other...**, browse for EndNote 21 in the Applications folder.
4. Click on **Change All...**

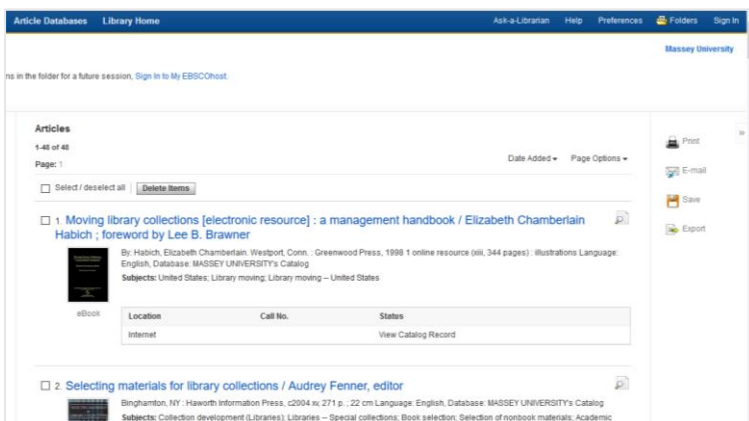
Mac users

When following the instructions below the EndNote Library may not open automatically. You may instead be prompted to select an application and/or the relevant Endnote Library.

Discover / EBSCOhost Databases



1. Click the folder icon next to the record you want to reference, or **Share** to add all the results from a page.
2. Find these saved results in **Folders**.



3. To export individual references **select** the checkbox. Do nothing to export all.
4. Export references to EndNote
5. On next screen, **Save** in RIS format. EndNote will open with your references, or you may need to open the file from your downloads.

Searching using EndNote's Online Search

EndNote's Online search import records directly from library catalogues and other sources. Massey Library generally recommends exporting from databases instead, but it can be used to search Massey's book collection.

1. Under **Online Search**, select **Massey Book Search**.
2. Enter your search. Keep your search results small with distinctive keywords.
3. Tick the boxes next to the records you want to keep.
4. Use the plus icon to add the records to your Library.

Scopus

On the results list, there is a tick box next to each record.

1. Tick the ones you want and then click on **Export** at the top of the result list.
2. **Click on RIS format (eg: EndNote, Reference Manager)**
3. From the boxes below select the information you want to export. **Abstract & References** is useful.
4. Click **Export**.

Google Scholar

Google Scholar records will not contain any abstracts or keywords, as Google Scholar exports only citations.

1. In Google Scholar, click on the Menu icon on the top left of the Scholar homepage.
2. Choose settings.
3. From the Bibliography Manager section, select **Show links to import citations into**, and pick **EndNote** from the drop-down box. Click on **Save**.
4. **Import into EndNote** links will now appear for each result.

To export multiple records

1. Sign into Google.
2. Save references to 'My Library' by clicking the star icon under the search result.
3. Access the saved references by clicking "My Library' located at the top right of the screen.
4. Select all or some of the references and export.

PubMed

1. On the results page, tick the records you want to export.
2. Click on **Send To** at the top of the results list.
3. Select **Citation Manager** from the menu.
4. Click on **Create File** to send to EndNote.

SciFinder-N

(i.e.: *Chemical Abstracts, MEDLINE*)

When you have a list of references in SciFinder-N:

1. Select the items you want by clicking the boxes. Selecting nothing will download up to the first 1000 results.
2. Click on the download icon on the top right and select **Citations (.ris)**

NOTE: These two databases may bring in abbreviated journal titles. A fix for journal title abbreviations is at:

https://support.clarivate.com/Endnote/s/article/EndNote-Generate-full-or-abbreviated-journal-names?language=en_US.

ProQuest Databases

(e.g. *ARTbibliographies Modern, Design & Applied Arts Index, GeoRef, Linguistics & Language Behavior Abstracts, Proquest Dissertations, Social Services Abstracts, Sociological Abstracts, etc*)

1. Tick the records you want to save.
2. Click **Save** and choose **RIS (works with EndNote, Civati, etc)**
3. Confirm the options in the box that appears and click **Continue**.

Exporting websites from Google or other search engines

It's not possible to export directly from Google, but many can be exported using zbib.org.

1. Go to zbib.org, paste in the webpage URL and click **Cite**.
2. Click on the drop-down menu next to **Copy to Clipboard** and choose **Download RIS**.

3. Double click the downloaded file.

Import existing full text PDFs from your computer.

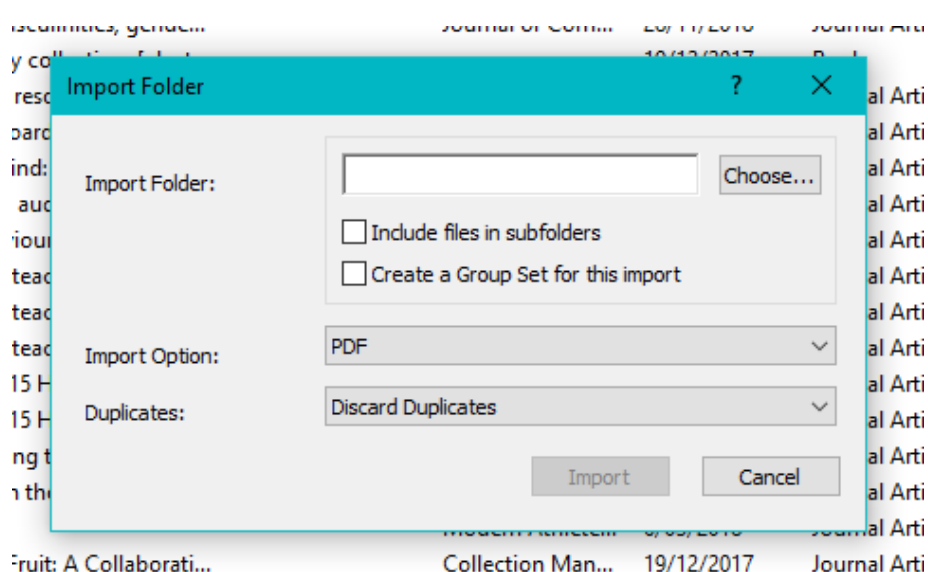
EndNote can extract the information it needs from many PDFs if they come from publishers' websites. You can also import stored PDFs into your EndNote Library.

In EndNote, go to **File > Import**

>**File** to choose a single PDF, or


>**Folder** to choose a folder of PDFs. You can choose to put them in a new Group.

Change the drop-down from '**Import All**' to '**Discard Duplicates**'



If a resulting record has no information other than the filename as the title, the PDF didn't have extractable information. In this case we recommend deleting the record, exporting the reference from a database, and manually attaching the PDF.

Manually add references to your library

If you can't import a reference you can add it manually. Use  or **References > New Reference** or **Ctrl+N**.

1. From the reference type menu, select the reference type. The default is Journal Article.
2. Type in the key information needed to create a reference and any other information you want to add at this point e.g. tags
3. Click **Save**.

Tips for adding or editing references:

· **Punctuation**

Apart from the cases below, do not add extra punctuation or text styles to the reference information e.g. bold, italics. EndNote will add punctuation and formatting if it is required by your selected style.

· **Authors**

Author names can be entered First Middle Last **or** Last, First Middle (e.g. Carol Margaret Jacobs or Jacobs, Carol Margaret).

· **Multiple Authors/Editors**

Each individual author **must** be entered on a separate line (press **Enter** to get a new line).

· **Organisational Authors**

Enter with a comma at the end e.g. World Health Organisation,

· **Autocomplete**

As you enter author names, titles, and keywords EndNote will supply possible words based on previous entries. New entries in these fields will initially appear in red font. You can select the supplied word by pressing **Enter** or **Tab**.

· **Titles**

Enter these in the correct case for your bibliographic style e.g.: Sentence case for article or book titles; or Title Case for journal titles. Check a style manual if you are unsure. To **Change Case** select the text in the Edit view and go to **Edit/Change Case**

· **Notes and/or Research Notes**

These searchable fields can be used to add your own comments to the reference. They will not appear in your bibliography.

· **Record Numbers**

As you enter references into your EndNote Library each record is allocated a **Record Number**. This number does not change even if previous record numbers are deleted.


Tags

You may want to add Tags to a reference. You have full control over what Tags you choose and which references they are added to.

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**. A **Find Full Text** will appear in the Groups panel showing progress.

The Full text may be available even if not picked up this way. Check by right-clicking on a reference a reference and selecting **OpenURL Link** (or **OpenURL**). See if you can navigate to the PDF. If so, save it to your desktop and link it manually.

Manually linking a PDF file to a reference

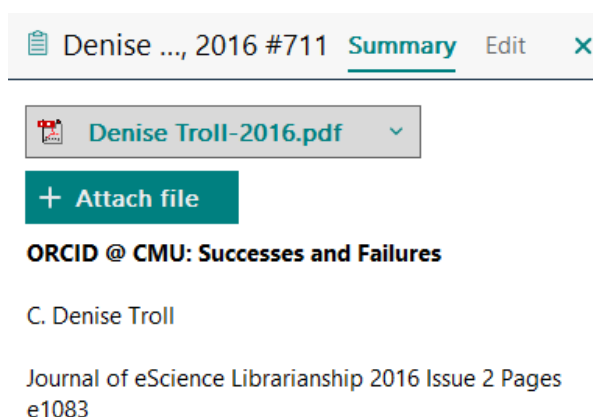
To add a PDF from your computer to an existing reference in your library, either

1. drag and drop the PDF file onto the reference in EndNote, OR
2. click on **Attach file** in the Summary view and navigate to the saved PDF.

Files can be deleted from your computer once in your EndNote Library.

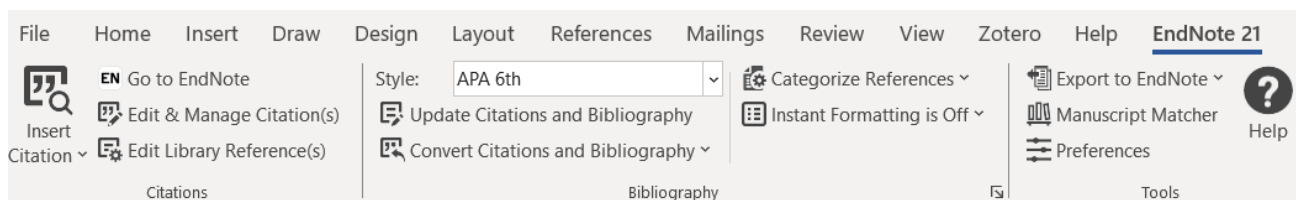
Removing a PDF from an EndNote Reference

Highlight the reference in your EndNote Library. Use the drop-down menu on the PDF's label and choose **Delete**.



Cite While You Write (CWYW) with Microsoft Word

Word can import references from EndNote into documents to create in-text citations and build your reference list. The commands below are all in the EndNote tab that will appear in Word once EndNote is installed.



Inserting Citations

You can either insert an already selected citation or search for a citation within Word.

Inserting a selected citation

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 **Ctrl**). In Word's EndNote tab click **Insert Citation/Insert Selected Citations**. In your EndNote library you can use the



icon.

Searching for a citation

In Word's EndNote tab click **Insert Citation/Insert Citation....**

You can search by any keyword or author name.

Highlight the citations you want and click **Insert**.

Editing and Deleting in-text citations

Sometimes you need to insert page numbers for direct quotations, exclude the author or year from the display, or add prefix or suffix comments.

To edit or delete an in-text citation use the EndNote '**Edit & Manage Citation(s)**' tool in Word.

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

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

To edit

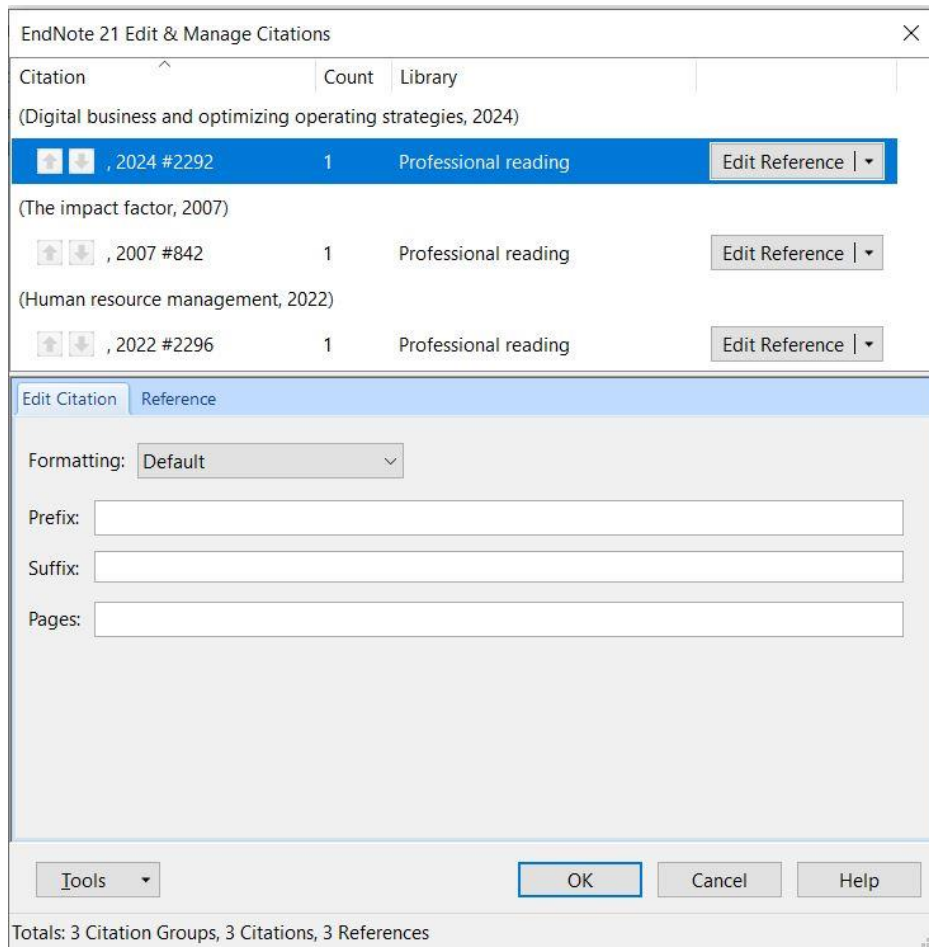
Check the correct citation is highlighted, add page number(s) or select other options as desired. Click **OK**

TIP:

Use 'exclude author' or 'display as author (year)' when you want the author's name outside brackets e.g. Hill (2012) found that people had difficulty...

To delete

Check the correct citation is highlighted, Click **Edit Reference** drop-down menu, then **Remove Citation**

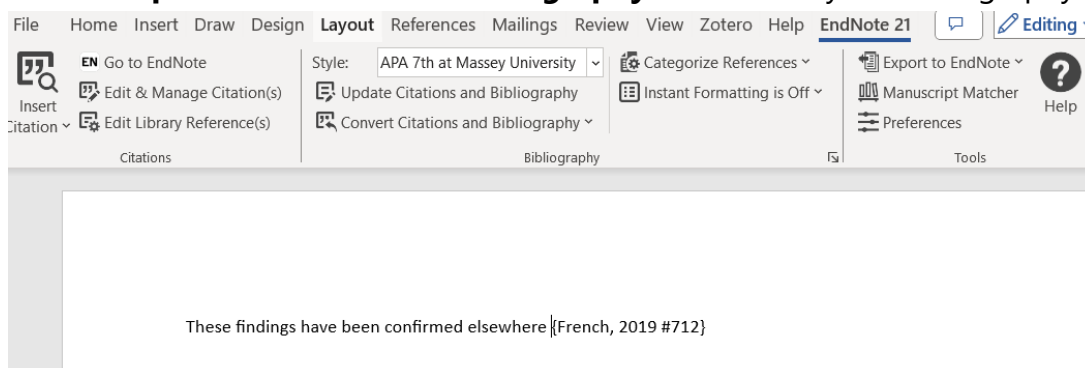


Deleting or Moving Multiple References

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

Unformat the citations by selecting **Convert Citations and Bibliography/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.



Working in Unformatted Mode

Working in unformatted mode is also useful when working in a very long document such as a thesis. By default, EndNote is set to allow instant formatting which updates the entire document when a new citation is added. If this is becoming a slow process, turn **Instant Formatting** to **Off**.

Changing the Formatting of Your Bibliography

1. Click the **Configure Bibliography** box (bottom right of the 'Bibliography' section - see above)

2. Select the relevant tab and make changes as appropriate:

Format bibliography – this allows you to change the document being formatted and bibliographic style selected.

Layout –lets you give your bibliography a title; change the font, line spacing etc.

Click **OK** when finished.

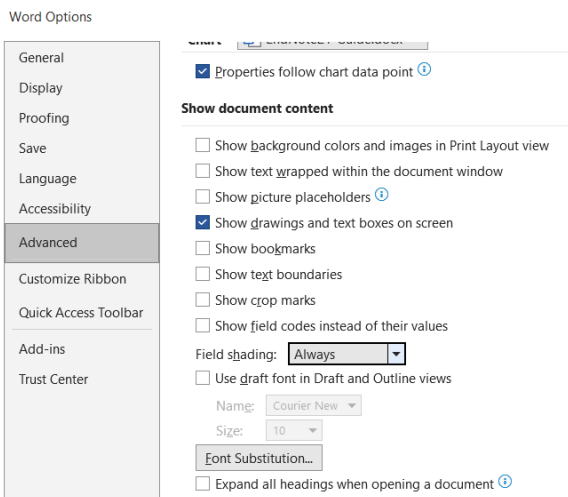
Set field shading in Word

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 go to **File/Options/Advanced**. Scroll to **Show document content**, and set **Field shading** to **Always**.



Groups and Tags

To help organise your Library, you can create Groups, up to 5000 of them. EndNote also has some default groups, both temporary and permanent. All groups appear in the Groups pane on the left. **Tags** work in a similar way to user created groups and you will also see the associated colour tag

User Created Groups

Use the Groups menu to create and manage your groups.

1. Having created a **Group** from the menu, add references by clicking and dragging them into the group from the main window. References in a group remain in the All References Group.
2. **Smart Groups** use keyword(s) to match references in your library. As more references are added to your library the Smart Groups automatically update. When you click **Create Smart Group** the following form pops up. When created it will pull any reference that match the word(s) in the Any Field – Contains boxes. In this case it is *tuatara*.

3. Individual groups can be placed into **Group Sets** for easier management. Click **Create Group Set**, name it, and drag the groups you want into it.

Default Permanent Groups

1. All References

Click to view every reference in the current Library, including references in other groups.

2. Trash

To move references to the Trash select them and press Delete.

Default Temporary Groups

1. Duplicate References

Displays the results of duplicate detection in an EndNote library. These can be searched for using **Library/Find duplicates** for any group. EndNote will prompt you to select which record to **Keep**. If you do not have time to go through all the duplicates, click **Cancel** if you want the default selections kept (the latest record added). Drag the highlighted references to **Trash**.

2. Find Full Text

Displays the last group of references for which EndNote inserted either the full text file or a URL - or has not found. When you close the library, this group is deleted.

3. Imported References

Displays the last group of references imported into the library. When you close the library, the group is deleted.

4. Search Results

Displays the most recent search results. When you close the library, the group is deleted.

Referencing Styles

EndNote comes with around 500 of the most popular referencing styles preinstalled. A drop-down box on the Summary view shows the referencing style being used.

The drop-down menu has several common styles. If the one you need isn't showing:

1. Click on **Select another style...** from the drop-down box.
2. Browse through the EndNote Styles window or use **Find by** to search by subject.

Click on the **Style Info/Preview** button to toggle between an explanation and a preview of a style.

3. Highlight the style you want and select **Choose**.

A further 6,000+ styles are available from the Endnote website at

<http://endnote.com/downloads/styles>.

Using EndNote Web

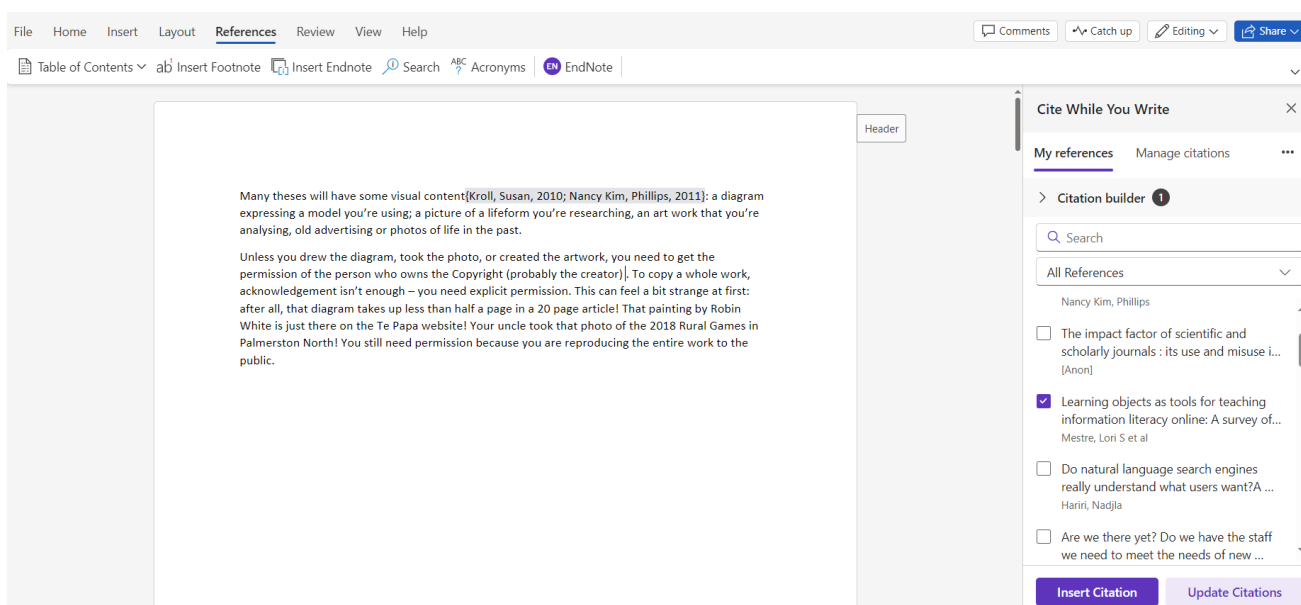
Working in Word Online and Google Docs

With the new EndNote Web introduced with EndNote 21, a CWYW add-on is available for both Word Online and Google Docs.

If you are collaborating with others, we recommend working with the same shared library or group.

Word Online

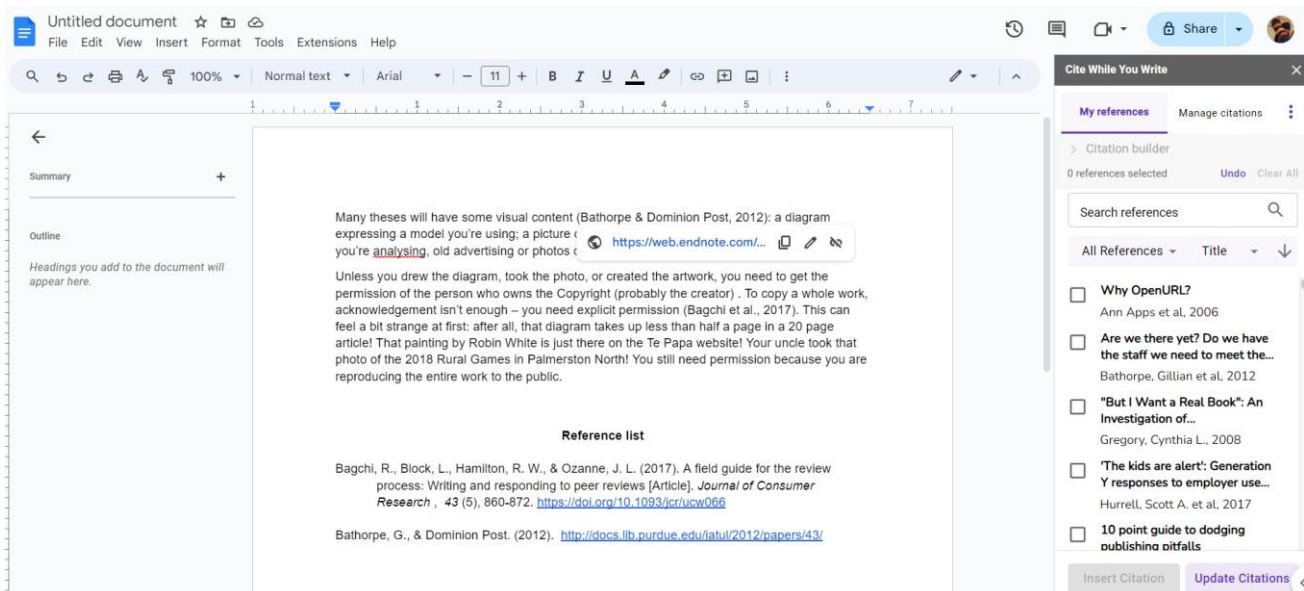
1. In Word Online, go to **File/Get Add ons** to get the EndNote 21 Cite While You Write extension. When set up it will appear on the right of your document when you are in the **References** view.



2. When entered, in-text citations appear in unformatted mode. Click **Update Citations** to format them. You will need to open the document in the desktop app to edit in-text citations (add page numbers, change how they display).
3. To remove a citation, click within it and go to **Manage citations**. Your citation should be ticked: click **Remove Citation**.
4. You can change the referencing style from the ellipsis ... next to **Manage citations**.

Google Docs

1. Get the EndNote 21 Cite While You Write [extension](#) in Google Marketplace or in Google Docs, go to **Extensions/Add ons** to get it. Click **Install**, then review T&Cs and privacy policy and click **Continue**. Sign into your Google account and allow Cite While You Write access.
2. Open CWYW from the **Extensions** tab. When open it will appear on the right of your document when you are in the **References** view. A security alert email will be sent to the email account associated with Google account; these are standard to notify access was granted to CWYW.



1. When entered, in-text citations appear in unformatted mode. Click **Update Citations** to format them. You will need to download the document and use the EndNote tab in Word to edit in-text citations (add page numbers, change how they display).
2. To remove a citation, click within it and go to **Manage citations**. From the citations listed click the pencil icon, and a trashcan icon will appear at the bottom. Click this to remove the citation.
3. You can change the referencing style from the three dots next to **Manage citations**.
4. Moving text around with EndNote citations will break the links to EndNote. This is best done in the Word app. See [Working in Unformatted Mode](#).
5. Multiple users can insert citations at the same time. All will see the references added by others but not who added them. Be aware that if a user updates the document at the same time as someone else is adding or editing a citation, the citation changes will be removed.

Note: Currently, footnote citation styles are not available.

Sharing EndNote libraries and groups

In EndNote desktop, go to **File/Share...** and enter in the email addresses of the people you want to share your library with. The email addresses must be the ones they used to create EndNote Web accounts. You can assign them Read Only or Read and Write Access.

To share a Group, right click on the Group's name and choose **Share Group...** Smart Groups can't be shared.

Further help

- Watch our [QuickStart Video tutorial](#)
- [Register for an Endnote class \(face-to-face or online\)](#)

- Check our [Massey EndNote FAQs](#)

Contact a librarian or book an appointment <https://massey.libcal.com/appointments/>

Phone 0800 468 542

Email library@massey.ac.nz