Centre universitaire de santé McGill | McGill University Health Centre | LIBRARIES

EndNote X9 Notebook - For Mac users

1. About EndNote 2
1.1. How do I Obtain Endnote? 2
1.2. Computer System Requirements 2
1.3. EndNote Updates 2
2. Managing EndNote Libraries 3
2.1. Creating a New EndNote Library 3
2.2. Opening & Closing an EndNote Library 3
3. Moving, Sharing, or Backing up an EndNote Library 4
4. Configuring the Find Full Text Feature 5
5. Adding References 6
5.1. From Bibliographic Databases: 6
5.1.1. PubMed 6
5.1.2. Web of Science 6
5.1.3. McGill Library Catalogue 8
5.1.4. Ovid Databases (e.g., Medline, Embase, PsycINFO) 9
5.1.5. CINAHL 10
5.1.6. Google Scholar 11
5.1.7. Scopus 12
5.1.8. Troubleshooting Direct Exports 12
5.2. From PDF files (DOI): 13
5.3. Manually 13
6. Managing References 14
6.1. Sorting References 14
6.2. Saving References to a Group 14
6.3. Searching References 14
6.4. Editing References 15
6.5. Deleting References 15
6.6. Printing a Reference List 15
6.7. Checking for Duplicate References 15
7. Attaching, Viewing and Annotating PDF files 16
7.1. Manually Attaching a PDF file 16
7.2. Automatically Attaching a PDF with "Find Full Text" 16
7.3. Annotating and Viewing PDF Files 16
8. Creating Bibliographies 17
8.1. Inserting References (Citations) in Your Word Document 17
8.2. Configuring Your Citations & Bibliography in Word 18
8.3. Removing a Citation from Your Word Document 18
9. Syncing Your Library with EndNote Web 19
10. Sharing Your EndNote Library 20
11. For Additional Information 21

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1. About EndNote

EndNote is a bibliographic management software program that allows you to:

- save and organize references from your searches
- create bibliographies
- cite references within your manuscript

1.1 How do I Obtain Endnote?

Hospital-based McGill staff and students with valid McGill University ID may install Endnote on their **personal computers** after downloading it from the McGill IT Knowledge Base at https://mcgill.service-now.com/itportal?id=kb_article&sysparm_article=KB0011096. Log in to the Knowledge Base with your McGill username and password to begin download. Contact your hospital librarian for more information.

1.2 Computer System Requirements

- Mac OS 10.10 and later
- Intel-based Macintosh
- 700 MB hard disk space available
- 2 GB RAM
- Microsoft Word for Macintosh, 2011, 2016 (version 15.21.1 or later) or Apple® Pages (plug-in must be downloaded)

1.3 EndNote Updates

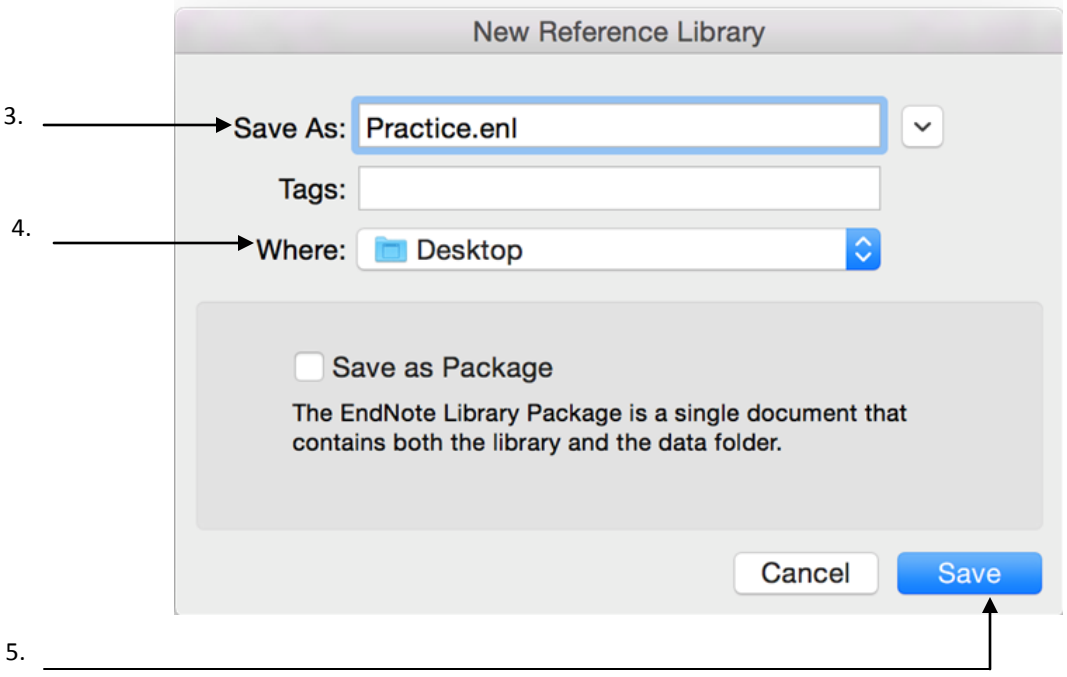
To update EndNote, open EndNote and click on **EndNote X9 > Check for Updates…**. A new window will open from which you can download and install any updates.

2. Managing EndNote Libraries

2.1. Creating a New EndNote Library

1. Open EndNote.

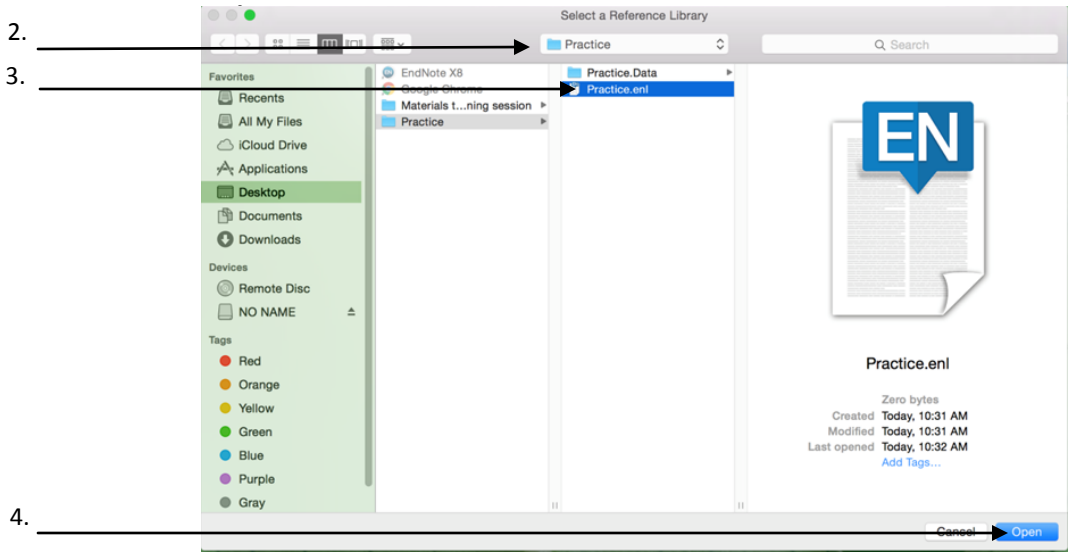
2. Select **File > New**. A window displays.



Note: Tick the "Save as Package" box to save the Library as a single document, otherwise you will have separate **.enl** and **.Data** folder documents. See **3 Moving, Sharing, or Backing up an EndNote Library** below for more details.

2.2. Opening & Closing an EndNote Library

1. Select **File > Open Library…**. A window displays.



5. Select **File** > **Close Library**.

3. Moving, Sharing, or Backing up an EndNote Library

An EndNote Library consists of an **.enl** file and a **.Data** folder. The Data folder has the same name as the Library and stores images, PDF files, etc. Both are necessary in order for your EndNote Library to function properly. An EndNote Library can be created as a package that integrates the **.enl** file and **.Data** folder into a single **.enlp** file.

To copy an Endnote Library, either:

- Copy both the **.enl** file and the **.Data** folder, or the **.enlp** file if the Library was created as a package.

OR

- **File** > **Save a Copy…**

To attach an EndNote Library to an email:

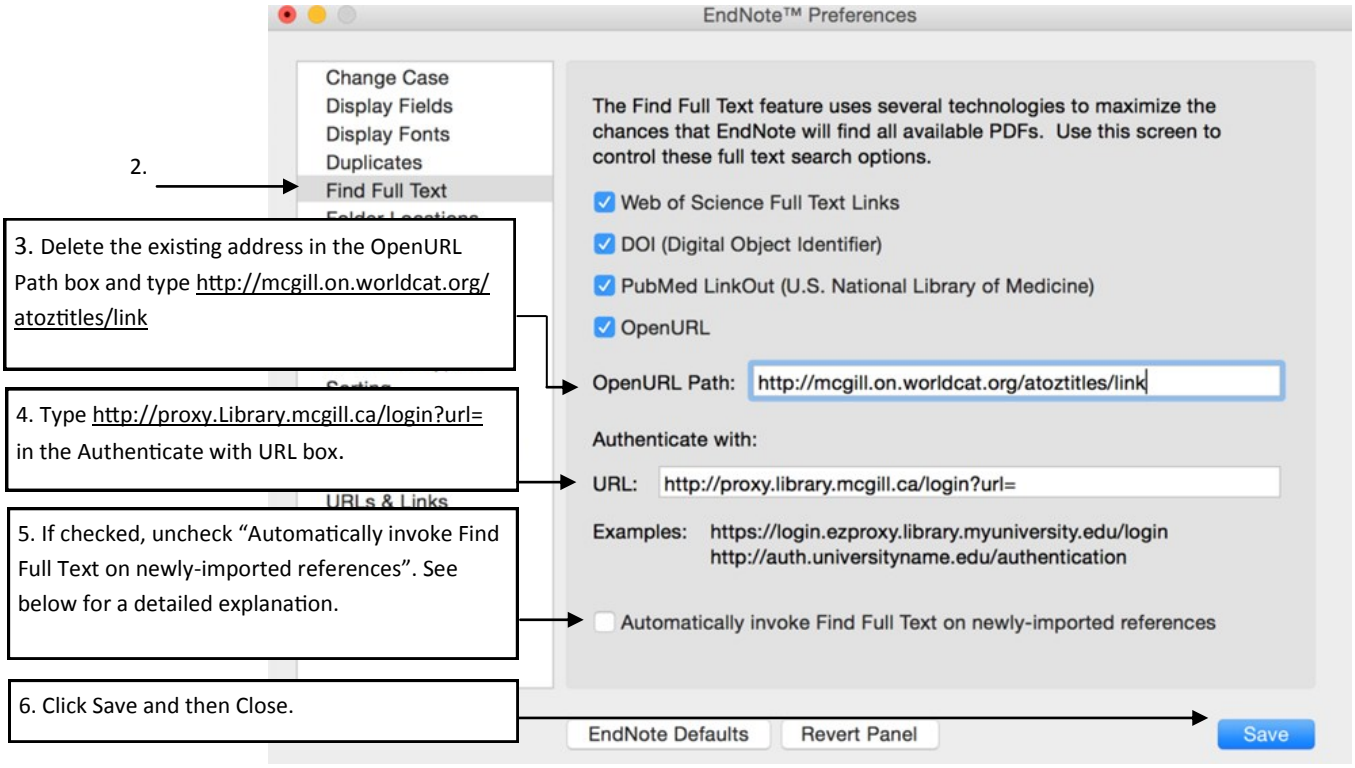
- **File** > **Compressed Library…**

This combines the .**enl** file and the **.Data** folder into a single **.enlx** file, which can be sent via email as an attachment. Compressing a packaged Library reduces its file size. When the **.enlx** file is opened in EndNote, it opens as an EndNote Library, consisting of an **.enl** file and **.Data** folder, even if the original Library was created as a package.

4. Configuring the Find Full Text Feature

For hospital-based personnel with McGill usernames and passwords:

1. Select **EndNote X9 > Preferences…**



Please note that the Find Full Text feature does not have a high success rate.

Since there are many variables involved, including how the publisher/database authenticates users, the automatic download of PDFs does not always work. You will have more success with items whose records include a DOI or other standard numbers. Articles not found via the Find Full Text feature may nonetheless have full text available.

We recommend that you leave the "Automatically invoke the Find Full Text on newly-imported references" feature **unchecked** in your preferences, as it begins before you are able to screen and deduplicate your references. To run Find Full Text on individual references, select the reference(s) and click **References > Find Full Text**.

Tip: To verify if McGill has electronic access to an article, configure your preferences as in steps 1-4 above, then select the reference and click **References > URL > Open URL Link**. A page will open in your browser providing a link to the full text if available. Please note that McGill's print journal holdings are not included in these results.

Contact your hospital librarian for more information on retrieving full text to articles.

5. Adding References

5.1. From Bibliographic Databases:

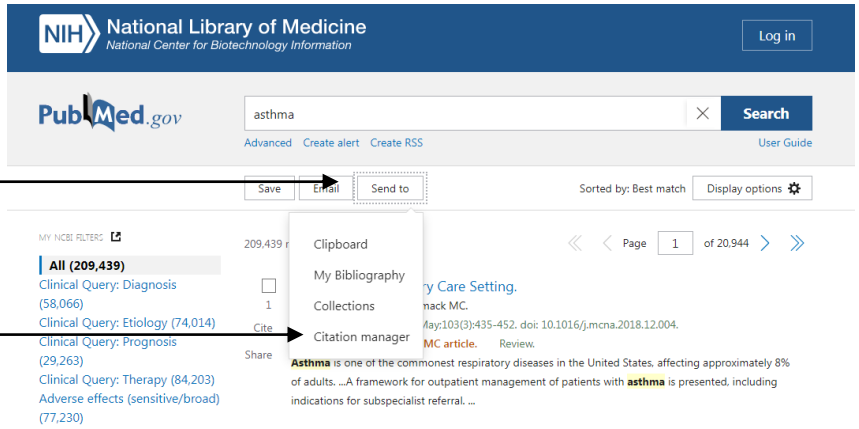
5.1.1 PubMed

Direct Export:

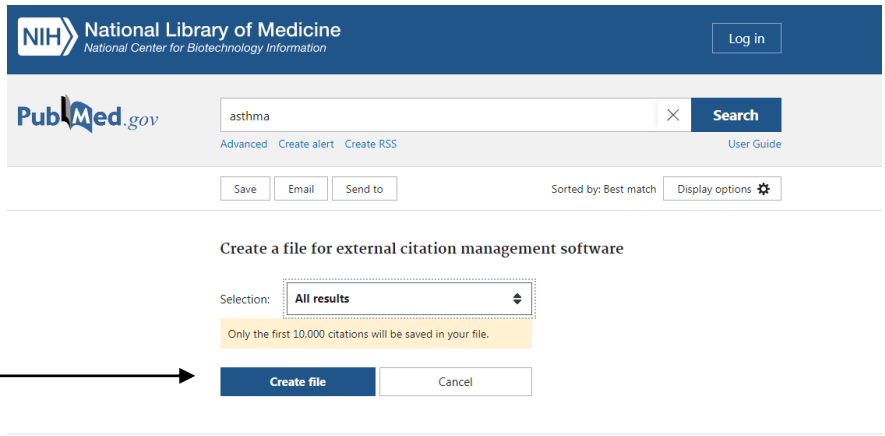
1. Search PubMed and select your results (by default, all results on the page are selected).

2.

3.



4.



5. Go to your downloads folder and double click the **.nbib** file. It should open automatically in your EndNote library.

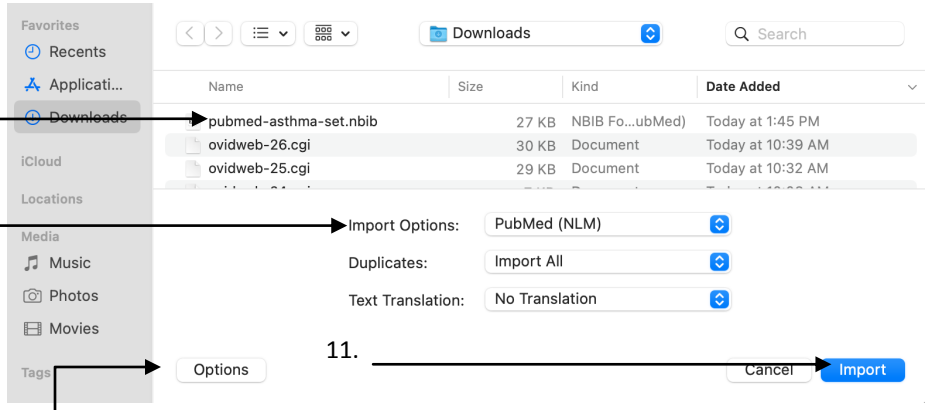
6. If your references are not imported directly into your Library, see **5.1.8 Troubleshooting Direct Exports**. As an alternative, save the **.txt** file containing the reference(s) and follow steps 7-10 in the section directly below, **Import from a Saved File**.

7. Save the **.nbib** file to your computer.
8. Open your EndNote Library and select **File** > **Import…**

9. Select the saved **.nbib** file of your PubMed search.

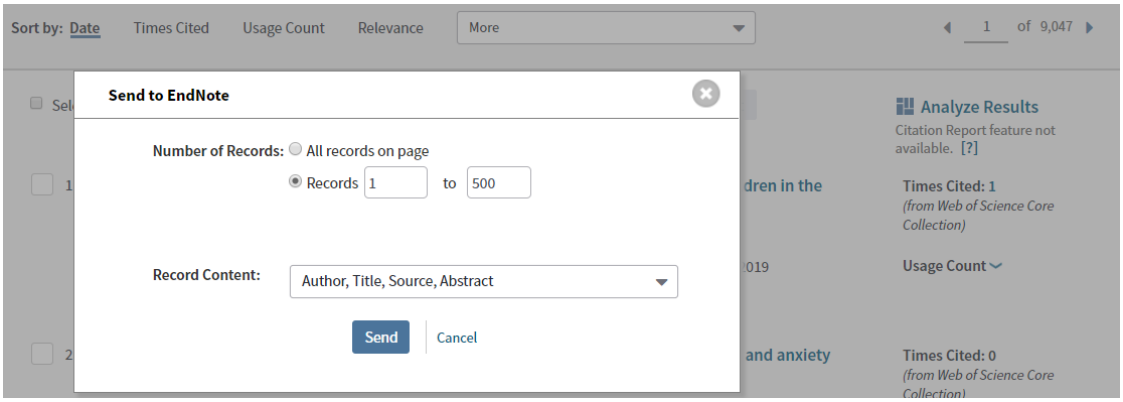
10. Click on **Import Options*** and select **PubMed (NLM)** as the import filter. If it is not there, select **Other Filters** to see more options.

***** If you do not see Import Options, first click Options to expand the pop-up box.



5.1.2. Web of Science

1. Search Web of Science and select your results.
2. Select **Save to EndNote desktop** from the drop-down menu at the top or bottom of the page.
3. A **Send to EndNote** window displays. To select more than the records on the page enter start and end record numbers in the Number of Records menu. A maximum of 500 results can be exported at a time. Select **Full Record** from the Record Content menu. Click **Send**.
4. If your references are not imported directly into your Library, see **5.1.8 Troubleshooting Direct Exports**. As an alternative, save the **.ciw** file containing the reference(s) and open your EndNote Library and select **File** > **Import…**. Select the saved **.ciw** file, then select **Web of Science** from the **Import Option** menu and click **Import**.

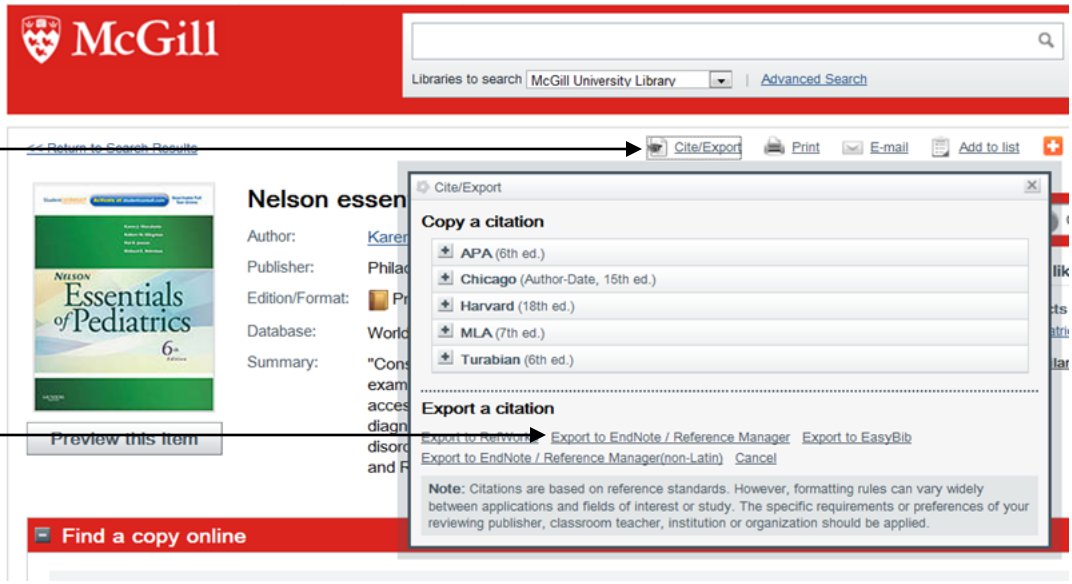


5.1.3. McGill Library Catalogue

1. Go to the McGill Library catalogue: http://mcgill.worldcat.org/
2. Run a search and select the item you want to export to your EndNote Library.

3. Click on the **Cite/ Export** button above your search results.

4. Click Export to **EndNote / Reference Manager**.

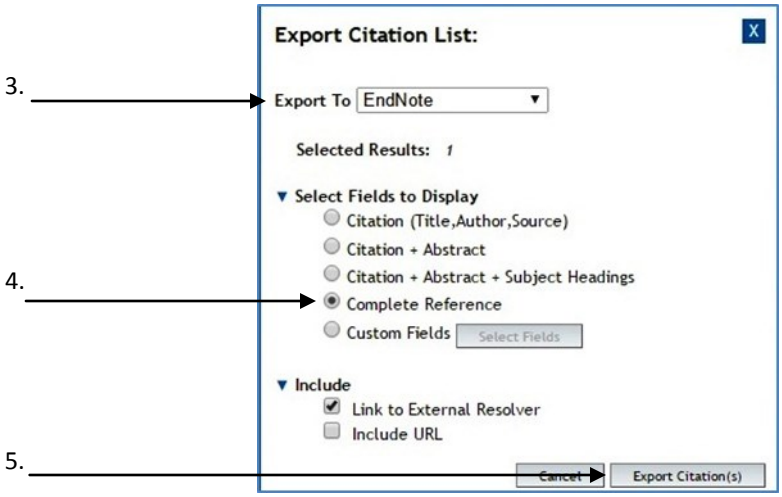


5. If your references are not imported directly into your Library, see **5.1.8 Troubleshooting Direct Exports.** As an alternative, save the **.ris** file containing the reference(s) and open your EndNote Library and select **File** > **Import…**. Select the .**ris** file, then select **Reference Manager (RIS)** from the **Import Option** menu and click **Import**.

Records imported from WorldCat may require editing,. See **6.4. Editing References.**

5.1.4. Ovid Databases (e.g., Medline, Embase, PsycINFO)

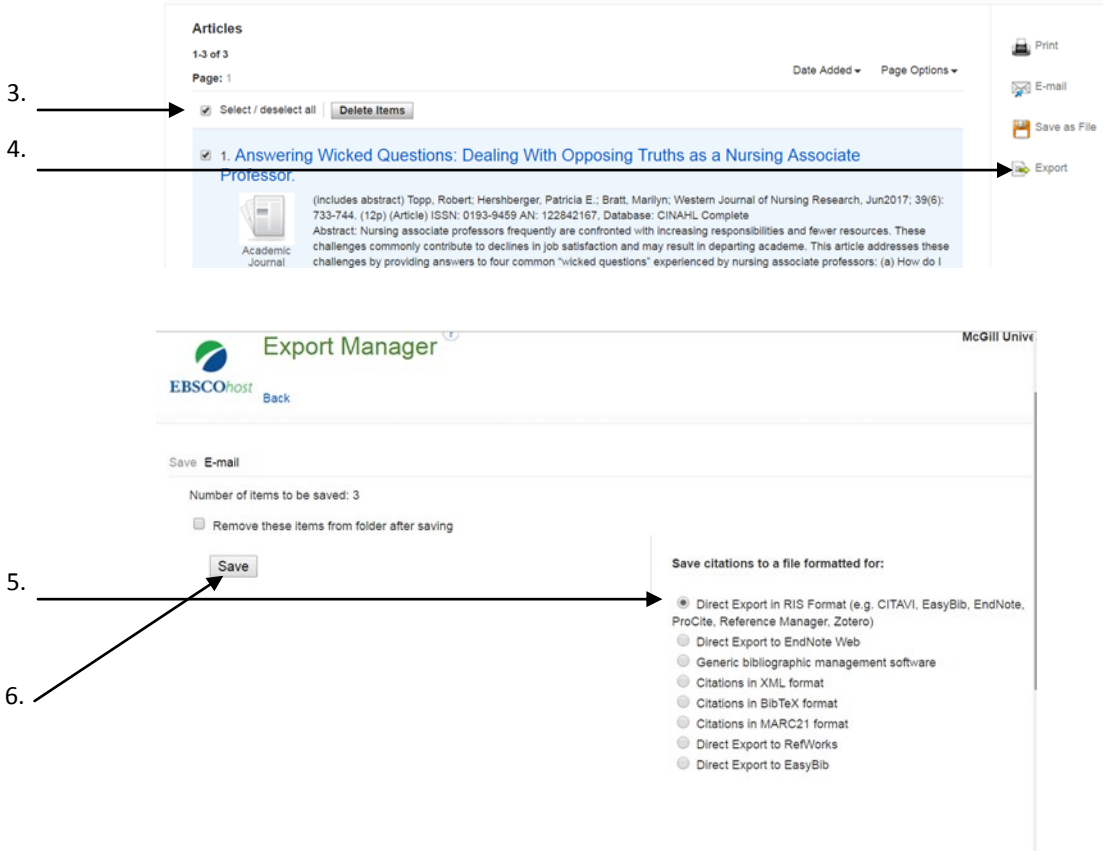
1. Search an Ovid database and select your results.
2. Click on the **Export** link above your list of search results.



6. If your references are not imported directly into your Library, see **5.1.8 Troubleshooting Direct Exports**. As an alternative, save the **.cgi** or **.ovd** file containing the reference(s) and open your EndNote Library and select **File** > **Import…**. Select the saved file, then in the **Import Option** menu select the import filter for the database, e.g. Medline (OvidSP), Embase (OvidSP), etc. and click **Import**.

5.1.5. CINAHL

1. Search CINAHL and select your results by clicking on the blue folder icon next to each result.
2. Click on **Folder** at the top right-hand side of the search screen.



7. If your references are not imported directly into your Library, see **5.1.8 Troubleshooting Direct Exports**. As an alternative, save the **.ris** file containing the reference(s) and open your EndNote Library and select **File** > **Import…**. Select the saved **.ris** file, then select **CINAHL (Ebsco)** from the **Import Option** menu and click **Import**.

5.1.6. Google Scholar

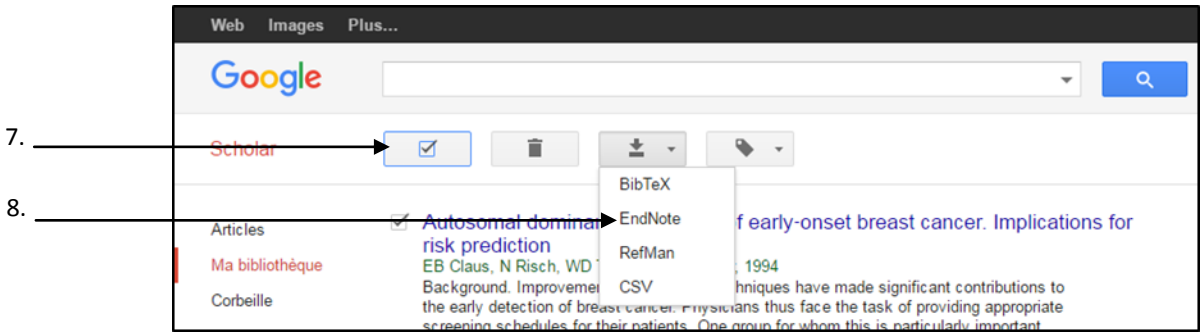
Quick Search:

1. Go to the Google Scholar homepage: https://scholar.google.ca/
2. Click on **Main Menu** at the top left-hand side of the screen.
3. Click on **Settings** and scroll to *Bibliography Manager*. Select the **Show links to import references into** option and select **EndNote** from the drop-down menu. Click on **Save**.
4. Search Google Scholar.
5. Import a reference by clicking on the **Import into EndNote** link, which displays below each Google Scholar search result.
6. If your references are not imported directly into your Library, see **5.1.8 Troubleshooting Direct Exports**. As an alternative, save the .**enw** file containing the reference and open your EndNote Library and select **File > Import…**. Select the saved **.enw** file, then select **EndNote Import** from the **Import Option** menu and click **Import**.

Importing multiple references from Google Scholar:

Log on to your Google account, and follow **steps 1-4 (above).**

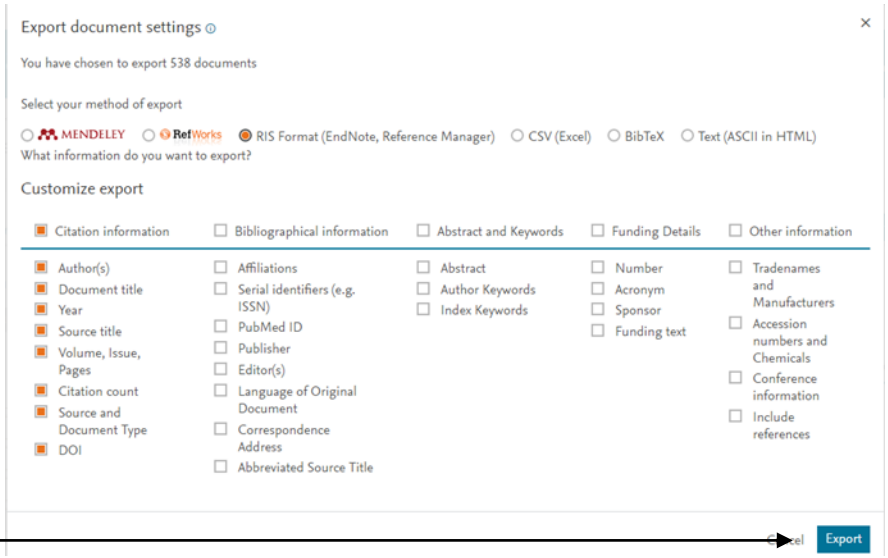
5. Select the references to import and click **Save**
6. Click **My Library**, on the upper left of the screen.



If your reference is not imported directly into your Library, see **5.1.8 Troubleshooting Direct Exports**. As an alternative, save the **.enw** file containing the reference and open your EndNote Library and select **File Import > File…**. Select the saved .**enw** file, then select **EndNote Import** from the **Import Option** menu and click **Import**.

Most of the time, data imported from Google Scholar is minimal. You may retrieve more information about the reference by selecting it in EndNote and selecting **References** > **Find Reference Updates…**

5.1.7. Scopus

1. Search Scopus and select your results.
2. Click on the **Export** link above your list of search results. A window displays.
3. Select the **RIS format (EndNote, Reference Manager)** option.
4. By default the *Citation information* category will be selected. If desired, select other categories or individual fields.
5. 

6. If your references are not imported directly into your Library, see **5.1.8 Troubleshooting Direct Exports**. As an alternative, save the **.ris** containing the reference(s) and open your EndNote Library and select **File** > **Import…**. Select the saved **.ris** file and select **Scopus** from the **Import Option** menu and click **Import**.

5.1.8. Troubleshooting Direct Exports

References can be exported from many bibliographic databases directly into an EndNote Library. Depending on your browser and how it is configured there may be additional steps involved. If the references do not immediately appear in your library:

1. Locate the export file in your **Downloads** folder or wherever your browser saves downloaded files. The file extension will vary depending on the database. Sort by *Date Added* if you are having difficulty finding it.
2. Drag and drop the file onto the icon for the EndNote X9 application (not your EndNote Library). If EndNote is active this icon appears on your Dock, otherwise it can be found in Applications > EndNote X9 > EndNote X9.
3. A **Select a Reference** Library window displays. Select an EndNote Library to send the references to.
4. Click **Open**.

When Direct Export is not available or not functioning properly references can be imported from a saved file within EndNote through database-specific **Import Filters**. See examples above for more information.

5.2. From PDF files (DOI):

PDF files can be imported directly into EndNote. Publisher-created PDF files, so long as they have properly formatted Digital Object Identifier (DOI) numbers, allow EndNote to create a reference in your EndNote Library at the same time.

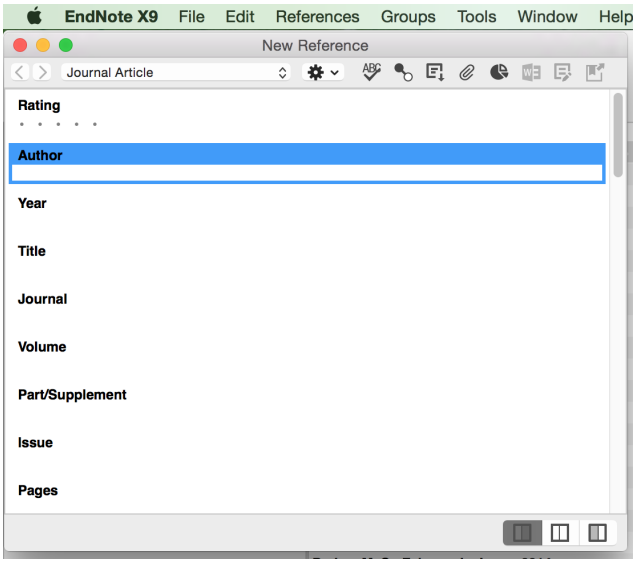
1. Select **File** > **Import…**
2. Click on the **Choose** button to select your PDF file.
3. Select **PDF** from the **Import Option** drop-down menu.
4. Click **Import**.

If the DOI is not properly formatted, the PDF will be imported, but you will need to manually complete the bibliographic data. See 6.4. Editing References.

5.3. Manually

1. Select **References > New Reference…**
2. Select the appropriate reference type from the drop-down menu (journal article, book, etc.).
3. Click on each field to enter the information.
4. Click **File > Close Reference** to save and close the reference.

Tips: You can enter an author's name as follows:
John Smith
Or
Smith, John



Place a comma after the name of an **organization**:

Ex : Health Canada,

McGill University Health Center,

If the organization name **contains** a comma, place **two consecutive commas** in the name, and none at the end.

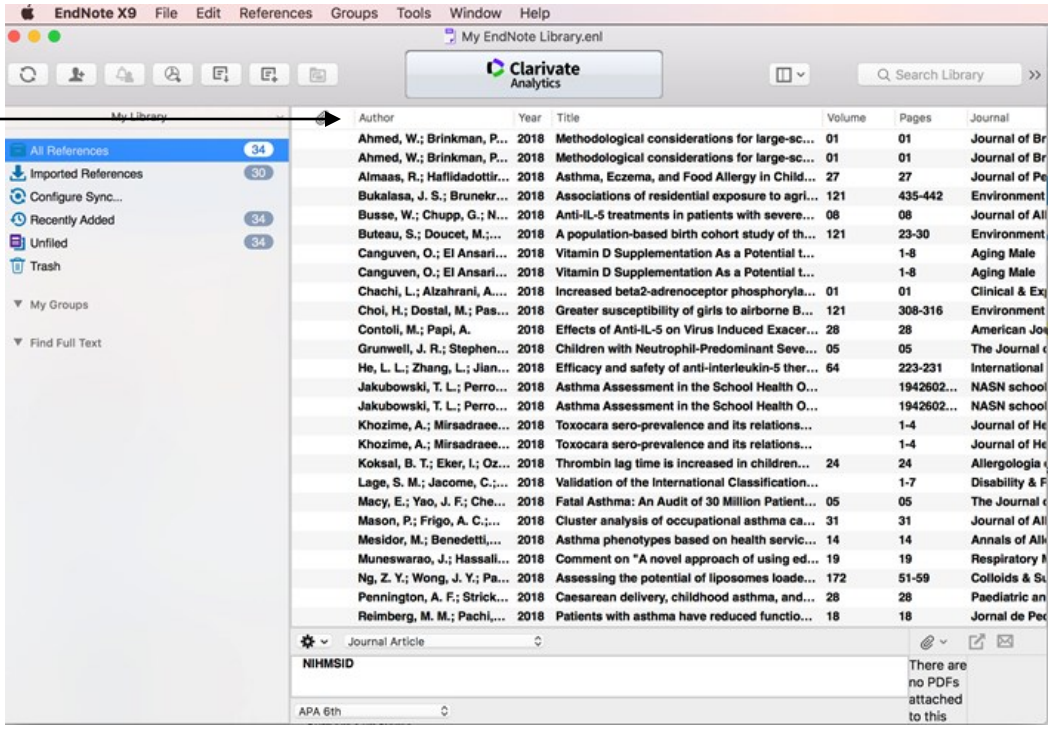
Ex: Ministry of Education**,,** Recreation and Sports

When entering author names be consistent with existing references.

6. Managing References

6.1. Sorting References

Click on any of the column headings to sort your references.



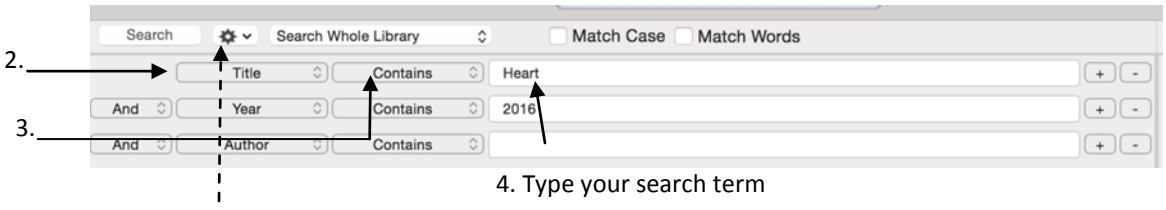
To sort references by multiple fields, use **Tools > Sort Library…**

6.2. Saving References to a Group

1. Select the reference(s) you wish to add to a group.
2. Select **Groups** > **Add References To** > **Create Custom Group…**. Name the group (e.g., Heart).
3. To add references to an existing group, select the reference(s), select **Groups** > **Add References To** > ***Group name*** (e.g., Heart).
4. Once a group has been created, references can be dragged into the group. Note that references can exist in multiple groups at once

6.3. Searching References

1. Click **Tools > Search Library…** to open the **Search Panel**. You can also use the **Quick Search** box to do a simple search.



Note: Click on the gear symbol for additional options and select **Convert to Smart Group** to create a group with your search results. The smart group will be automatically updated with references that match the search strategy when new references are added to your Library.

6.4. Editing References

1. Select the reference you wish to edit.
2. Select **References > Edit References…**
3. Click on the field to edit and make your changes.
4. Select **File > Save**.
5. Select **File** > **Close Reference**.

6.5. Deleting References

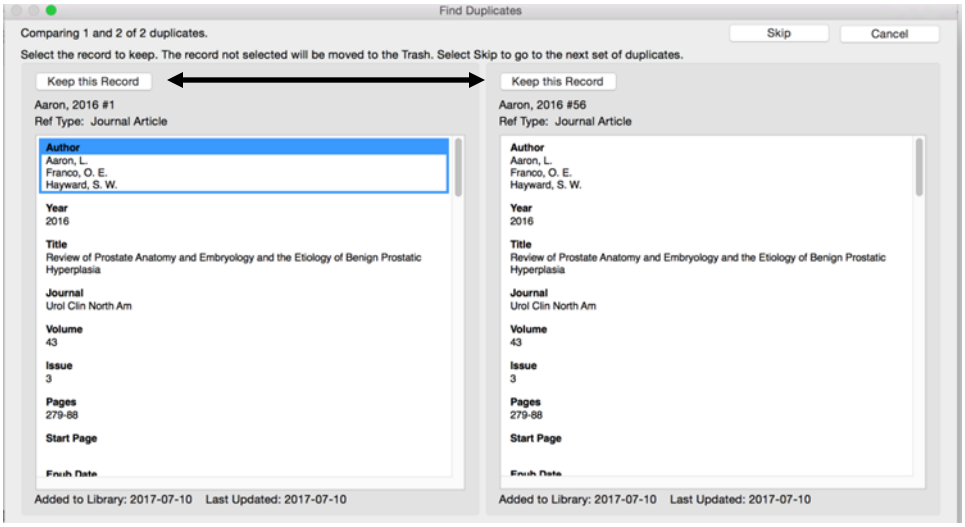
1. Select the reference you wish to delete.
2. Select **References > Move References to Trash**.
3. Select **References** > **Empty Trash** and click on **Yes**.

6.6. Printing a Reference List

1. Select the references you wish to print, or choose **Edit** > **Select All** if you wish to print all the references.
2. Select **Edit > Output Styles** to choose an output style. For more output styles select **Open Style Manager…** and check the box of an output style to add it as an option.
3. Select **File** > **Print…**

6.7. Checking for Duplicate References

1. Select **EndNote X9 > Preferences…**
2. Click **Duplicates** in the left menu to choose the fields you want EndNote to compare, and click **OK**. The default fields are author, title and year.
3. Select **References > Find Duplicates**.
4. Compare duplicate references with the auto-highlight feature.
5. Select which reference to keep by clicking the **Keep This Record** button. The discarded reference will automatically be added to the **Trash**. If you do not want to compare every duplicate side by side click **Cancel**. All duplicates will be selected. Click **References > Move References to Trash**.



7. Attaching, Viewing and Annotating PDF files

7.1. Manually Attaching a PDF file

1. Select a reference.
2. Click **References > File Attachments > Attach File…**
3. Select the PDF and click **Open**.

7.2. Automatically Attaching a PDF with "Find Full Text"

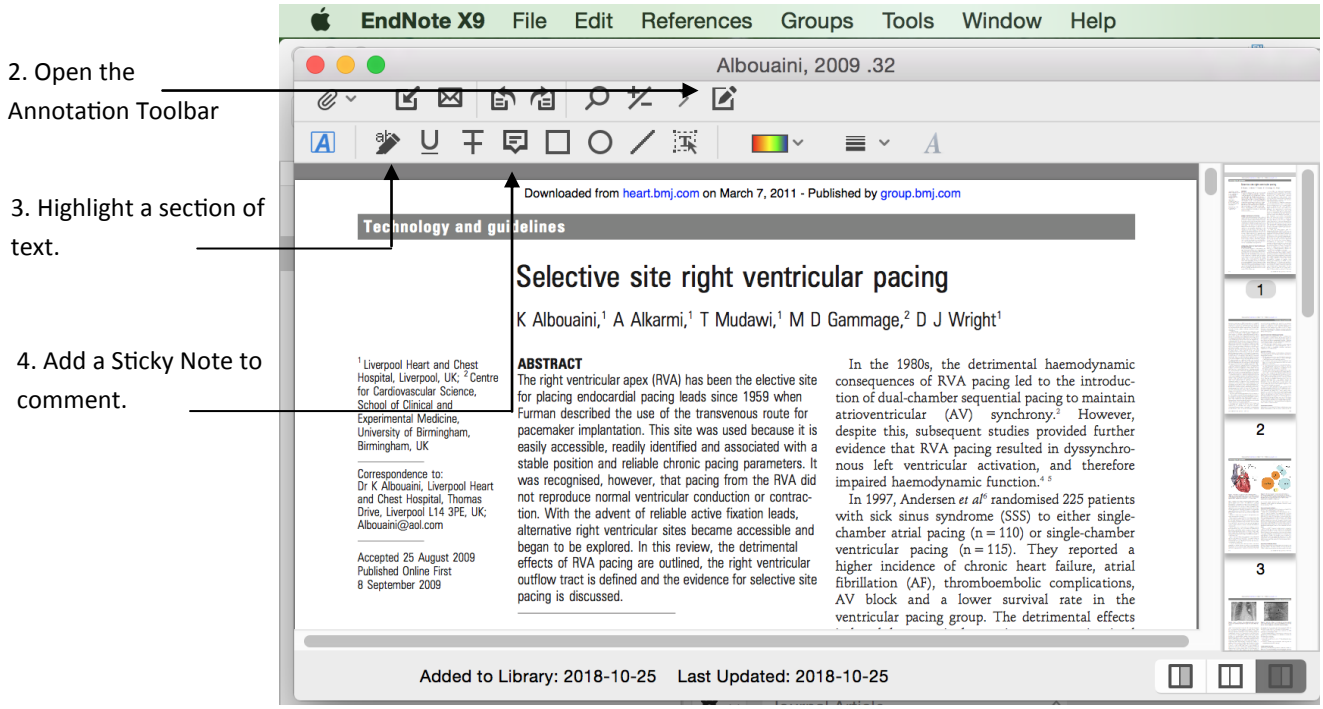
1. Select one or more references.
2. Select **References > Find Full Text > Find Full Text…**. If the PDF file is found, EndNote will automatically attach the PDF to the reference.

Please note that the Find Full Text feature does not have a high success rate.

Because there are many variables involved, including how the publisher/database authenticates users, the automatic download of PDFs doesn't always work. You will have more success with items whose records include a DOI or other standard numbers. Articles not found via the Find Full Text feature may nonetheless have full text available. Contact your hospital librarian for more information.

7.3. Annotating and Viewing PDF Files

1. Double-click on a reference to open the attached PDF.

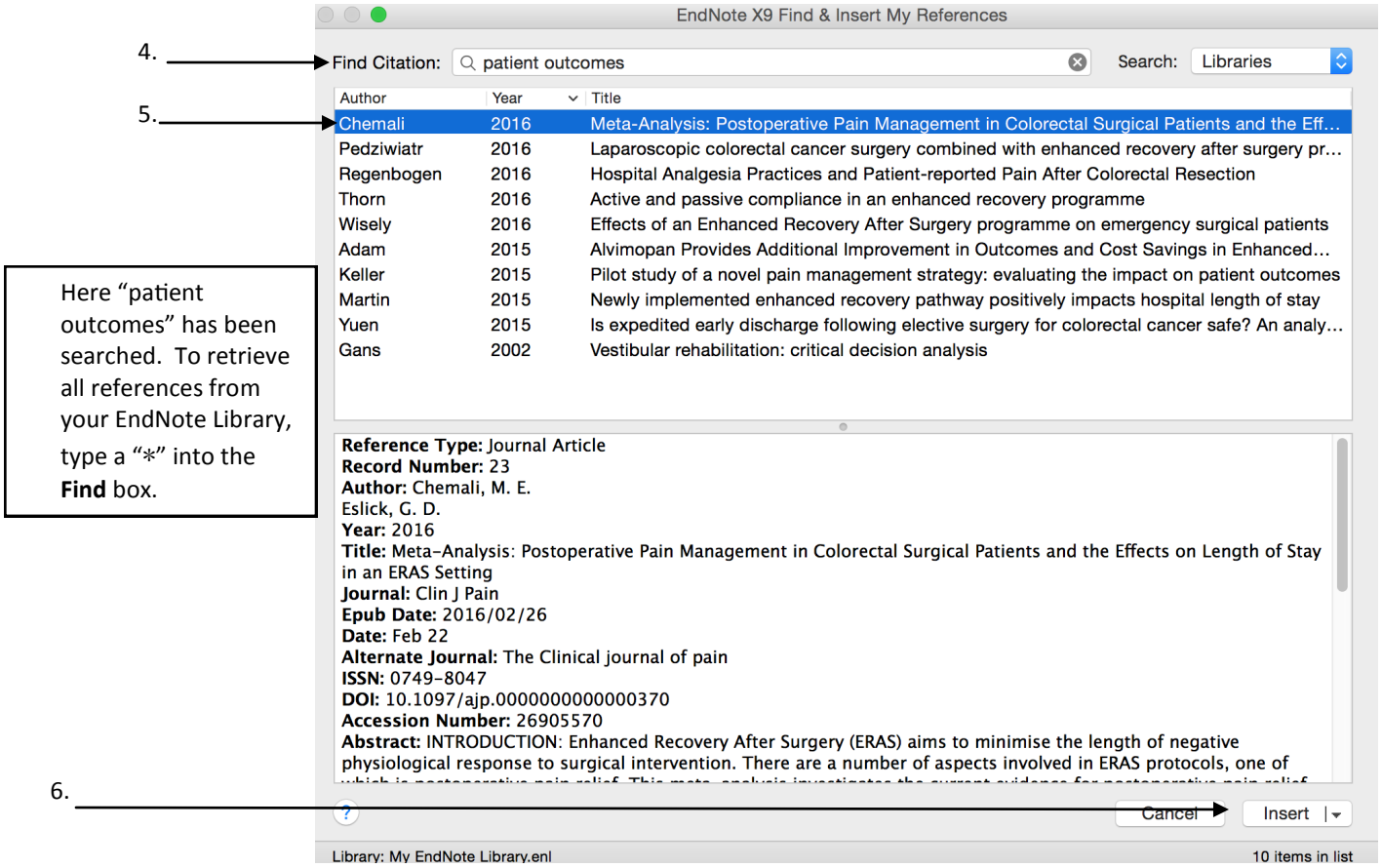


5. Select **File > Save** to save your annotation.

8. Creating Bibliographies

8.1. Inserting References (Citations) in Your Word Document

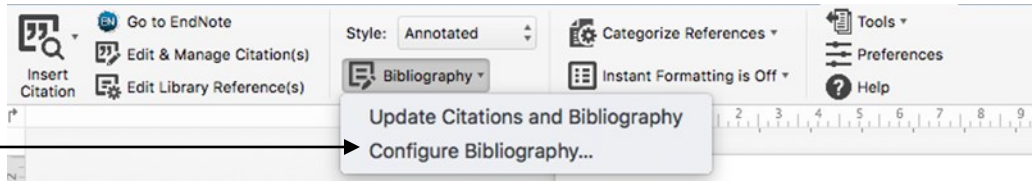
1. Open your EndNote Library and your Word document.
2. Place your cursor where you wish to insert your citation in your document.
3. Click on the **EndNote X9** tab > **Insert Citation** > **Insert Citation…** (if you are running an older version of Word, 2013 or earlier, you will have to access EndNote through the **Tools** menu)



Here "patient outcomes" has been searched. To retrieve all references from your EndNote Library, type a "*" into the **Find** box.

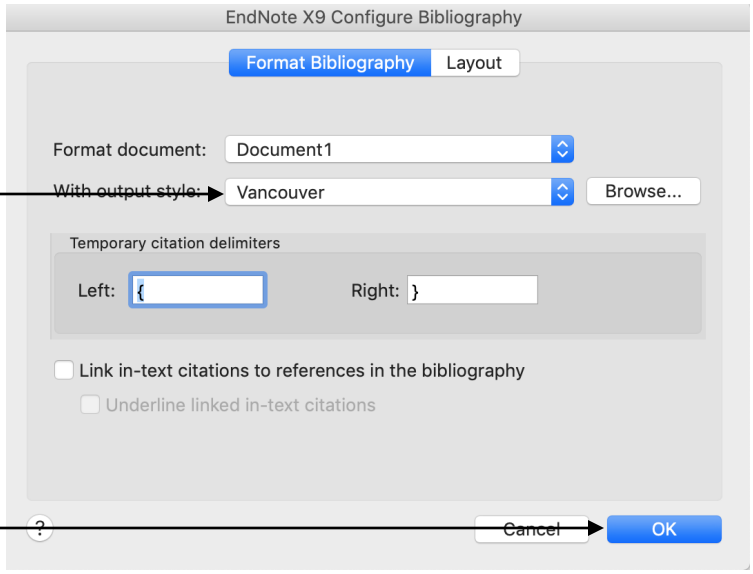
8.2 Configuring Your Citations & Bibliography in Word

1.



2. Select the output style to use for formatting your references.

3.



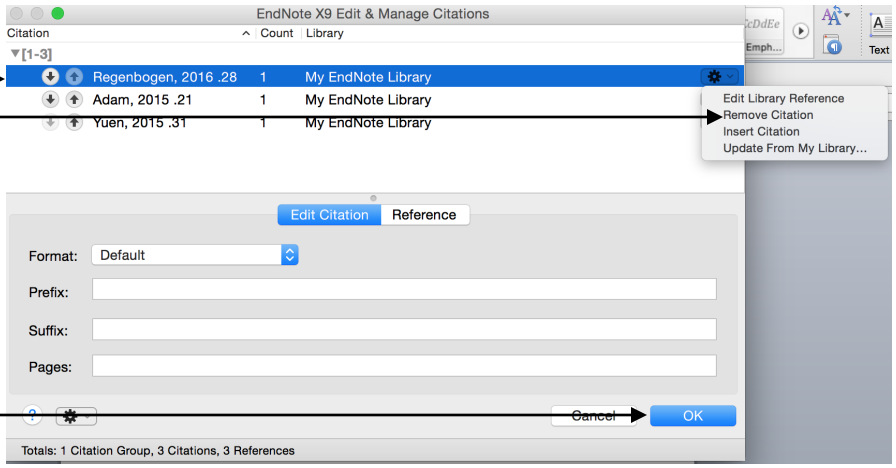
8.3. Removing a Citation from Your Word Document

1. Click on **Edit & Manage Citation(s)…**

2.

3.

4.



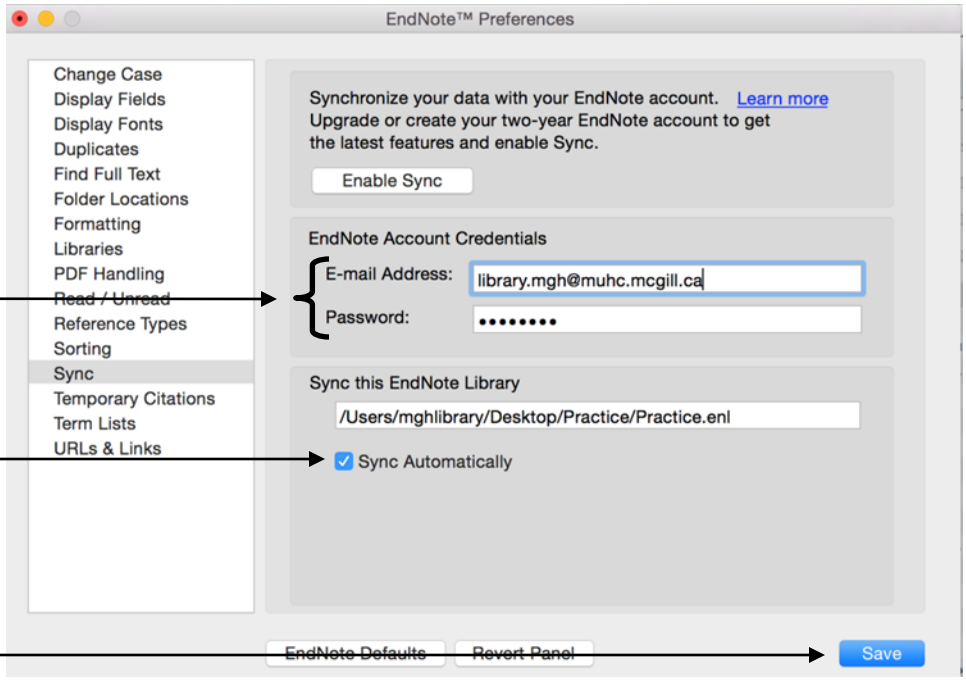
9. Syncing Your Library with EndNote Web

EndNote Web is an Internet-based service that allows you to access your EndNote references via the Internet, regardless of whether EndNote is installed on your desktop. To create an EndNote Web account, visit http://www.myendnoteweb.com using a computer with EndNote installed. Click on the **Create an account** link and follow the instructions on the screen.

After creating an EndNote Web account, you can synchronize **one** EndNote Library from your desktop with your EndNote Web account. Once synchronized, all the references from your desktop EndNote Library will be copied into your EndNote Web Library and vice versa. After the initial sync, EndNote will continuously synchronize your desktop EndNote Library and your EndNote Web account.

To sync your references:

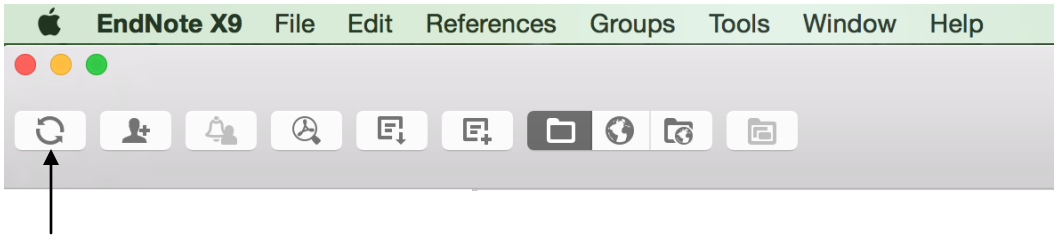
1.Open your EndNote Library on your computer. Click **EndNote X9 > Preferences…**
2.Click **Sync** from the left menu.



3. Enter your e-mail address and password associated with your EndNote Web account.

4.

5.



6. You may also click the **Sync** button in the Library toolbar to manually synchronize the references in your EndNote Library with the references in your EndNote Web Library.

10. Sharing Your EndNote Library

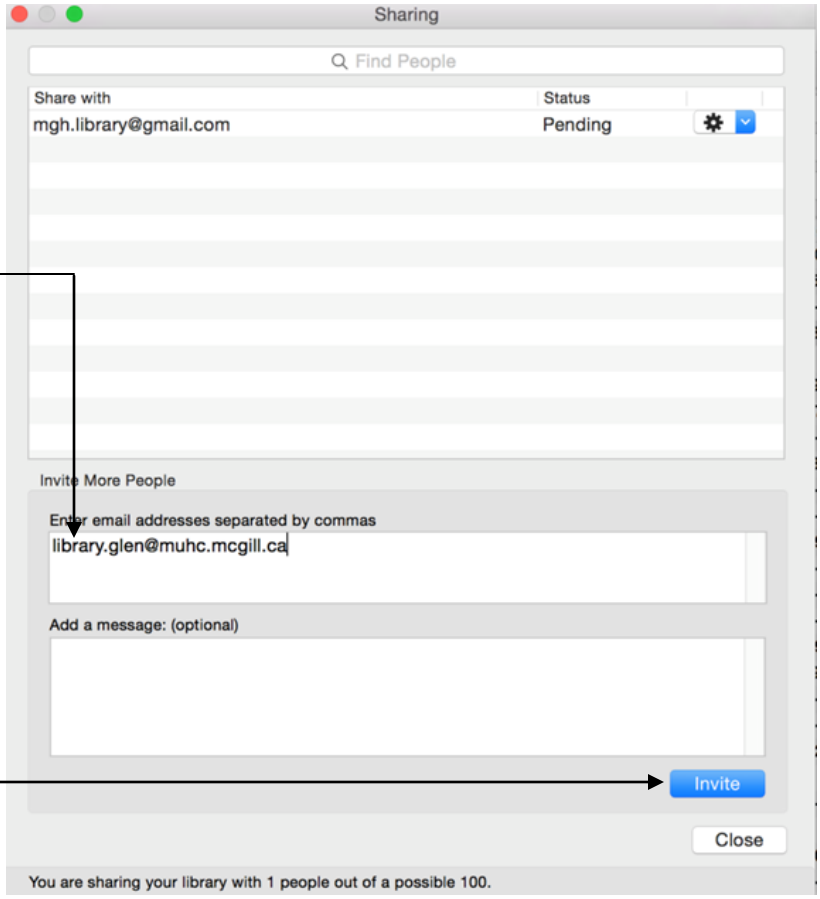
EndNote X7.2 and later allow you to share your EndNote Library with up to 100 other EndNote users. To share your library, your desktop EndNote must be synced with an EndNote Web account (see **9 Syncing Your Library with EndNote Web**).

Note: While you can only share the library you have synced with your EndNote Web account, unlimited libraries can be shared with you.

1. In your desktop version of EndNote, click **File > Share**

2. In the "Invite More People" box type the e-mail addresses of the people you would like to share your library with.

3. Next click **Invite**. The email address entered must be associated with the person's EndNote Web account. If the person does not have an EndNote Web account they must create one and sync it to their desktop library using the same e-mail address used in the invitation.



To open a library that has been shared with you, click **File > Open Shared Library…**

11. For Additional Information

Manual & Guide: A comprehensive EndNote manual is automatically installed with the program. Titled *EndNote X9 MAC Documentation*, it is located in the EndNote X9 folder on your computer (Applications > EndNote X9 > EndNote.pdf). A more succinct guide, the *Little EndNote How-To Book*, is available on the Web: http://endnote.com/if/online-user-manual/X9.

How to Import Search Results from Different Databases: Select **Help** and in the search box provided type "Output Formats with Corresponding Import Options". You will find a list of how to import search results from various databases.

Updates to Import Filters: http://endnote.com/downloads/filters
Updates to Output Styles: http://endnote.com/downloads/styles
Frequently Asked Questions: http://endnote.com/support/faqs
Online Tutorials: https://clarivate.libguides.com/endnote_training/users/enx9
EndNote Web: https://www.myendnoteweb.com

For further assistance, please contact your hospital librarian.

McConnell Resource Centre

GLEN site B RC 0078, ext. 35290

Montreal General Hospital Medical Library

MGH Room E6-157, ext. 43058

Montreal Neurological Institute and Hospital Library

MNI Room 285, Tel: 514-398-1980