USING ENDNOTE ON A MAC
(with APA examples)
Version 1

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1. STORING REFERENCES

1.1 Setting referencing style

Towards the lower right hand side of the screen there is a drop-down menu which allows you to select the referencing style you wish to use. Most Avondale students use APA, except ministry and theology students who use Turabian. There may be other rare exceptions.

1.2 Primo search—adding one record to EndNote

With EndNote open, conduct a Primo search which will generate a set of results. Under the ‘Show Only’ filter on the left hand side of the results screen, you might select the option ‘peer-reviewed journals’, as these are one of the best sources of information for academic writing.
Click on an article of interest to you, then select one of the databases in which it’s available (e.g. ProQuest).

In this case, we have chosen to access the article from the ProQuest data base. Other databases will have similar processes to what is described below, but there will be variations.

You might choose to first click the “Download pdf” button and save the pdf to an appropriate location in your folders. Then go back to the ProQuest page and, under the ‘Download pdf’ button, click on “...more”.

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Next, select ‘RIS (Works with EndNote)’

Press ‘continue’

A “.ris” file will download to your downloads folder. Click it to open it.
Select ‘Choose Application’ then navigate to EndNote and double click.

The reference will appear in your EndNote library, under ‘Imported References.’

Note: You generally wouldn’t consider an article with ‘anonymous’ as the author as being a scholarly academic source of information.
1.3 Primo search—adding multiple records to EndNote

If your Primo search results include multiple resources that look helpful, you can add them to your library basket. Click on the ‘details’ tab of the book or article, select ‘Actions’, and choose ‘Add to my basket’. Do this for all items of interest to you.

Once you have all the items in your basket, click on ‘My basket’:

Tick the items you want to add to your EndNote library, click on ‘Select how to save’, choose ‘Push to EndNote RIS’, then click the small orange ‘Go’ button.

Click ‘OK’ at the next screen:
An “.ris” file will download—double click on the document icon in the downloads folder in your dock:

Select ‘Choose Application’ and then navigate to EndNote:

You might be asked to select a reference library. In this case, choose your “.enl” library file that you named when you started EndNote up.

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Once you select the library, the downloaded records will appear in the EndNote screen.

You need to go back to the Primo search results to download each article—the process described above only downloads the reference record into EndNote.

1.4 Database search—adding results to EndNote

A Primo search doesn’t look through all databases, so sometimes it may be necessary to search a specific database. For a list of databases suitable for your area of study, browse by subject here.

Choose an appropriate database and conduct a search to generate a set of results. Refine the list if necessary e.g. by publication date, etc. Look through the list and tick the box on the left hand side to select articles of interest to you.

For instructions on how to download your selected references to EndNote, click here.
1.5 Books—adding results to EndNote

Books can be another source of reliable, scholarly information. If you perform a Primo search and find a book you think you’ll use, here’s how to import the reference into EndNote.

Click on any one of the ‘Locations’, ‘Details’, or ‘Browse’ tabs. Over to the right hand side you will see an ‘Actions’ dropdown menu.

From the Actions dropdown menu, select ‘EndNote RIS’, then click ‘OK’ on the next screen.

As with the process described above, double-click on the “.ris” file from the download folder, and navigate to EndNote to open it. The book will appear in your EndNote library.
1.6 Editing a reference record

In the example above, notice how, in the APA-formatted reference, the edition appears as “5th ed. ed”. This is because the entry, in the record field for edition, has “5th ed.”. It should just have “5th”. You can fix errors like this by selecting the reference record, then clicking on ‘References’ then ‘Edit References’ from the menu bar.

Make sure you have selected the left or centre icon on the bottom of the editing window. Scroll to the field that needs editing, click in the field, make the changes, close the window, and press ‘save’ when prompted.

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1.7 Groups

The items in your EndNote library can be organised into groups (like a folder). You could have a group for a unit, an assignment, or a topic.

To create groups, click on ‘Groups’ then ‘Create Groups’, and give a name to the group e.g. EDUC30103, or Classroom Management, etc.

To file items into groups, select the items from the list, then drag them across to the group. They will still appear in the “all resources” list as well as in the group.
2. STORING ARTICLES

As well as storing the references in EndNote, you can also store the articles by attaching them as pdf documents to the reference records. One way of doing this is to use the ‘Find full text’ function within EndNote.

2.1 Find full text

To find full text, in EndNote click on the references for which you want the full text, select ‘References’ from the menu, then ‘Find full text’.

EndNote will tell you how many it was able to find, and a paperclip symbol will now appear against the successful items.
2.2 Attach pdf manually
After adding a reference record to your EndNote library you can then attach the pdf to the record. You first need to download and save the pdf as described above. Then select the reference entry and click on the paperclip symbol. Navigate to where you stored the pdf to select it. You can now access the article from within EndNote—it is linked to the record.

2.3 Read a pdf from within EndNote
Select the reference, and click on the ‘open pdf’ button.
3. WRITING ASSIGNMENTS

3.1 Inserting in-text citations

While writing your assignment from within Word, also have EndNote open. When you need to insert a citation (e.g. you have directly quoted from a source, or have used an author’s ideas), put your cursor in the spot where you want your citation, then go into EndNote, select a reference, and click on the ‘insert citation’ button:

The citation will appear in the essay text, and the reference entry will appear on the last page of your assignment.

3.2 Adding page numbers to a citation

If you have directly quoted from a source, you need to include page numbers in the citation. To do this, click in the citation in the Word document, then go to Edit and Manage Citations on the EndNote X7 tab:
In the ‘pages’ field, enter the page number from which the quote or idea was taken, then click ‘OK’.

The page number will be entered into the citation.

3.3 Deleting a citation: VERY IMPORTANT

If you decide to delete a citation, DO NOT just press the delete button. EndNote puts the citation in the document with background code, and to ensure this is deleted (and doesn’t mess up your document), you need to click in the citation in the Word document, then go to Edit and Manage Citations on the EndNote X7 tab:
Click on the menu to the right of the selected reference, and choose ‘remove citation’.

3.4 The reference list

As you insert citations into your text, the entries are also added to the References list at the end of the assignment. Occasionally there will be inaccuracies in the list. You can correct inaccuracies via your EndNote library (as above – see ‘Editing a reference record’) or, when you have completely finished your assignment, convert the reference list to text and make final changes. Once you have converted the list to text, you can’t change it back, so only do this when you have definitely finished your assignment.

On the EndNote X7 tab, select ‘Tools’ and ‘Convert to Plain Text’
You can then make manual changes, such as the pagination in the Stephens entry below, or in the capitalisation in the Bradbury and Stephens entries.

Note that you can often fix problems within the EndNote record, but sometimes it is preferable to fix them manually in Word at the end of the assignment writing process.