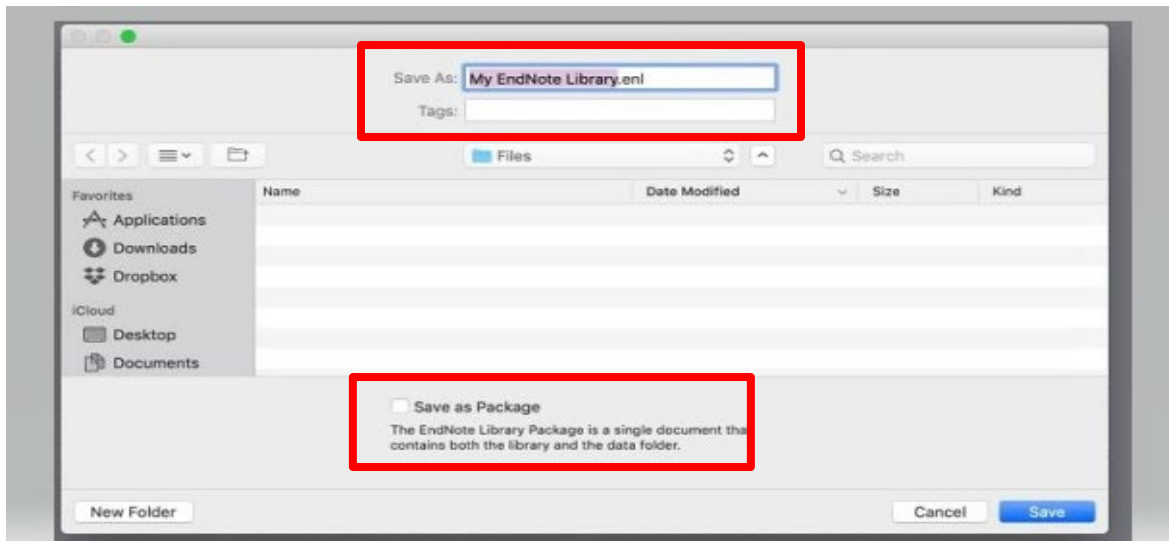


ENDNOTE X9 on macOS CLASS HANDOUT

CREATE AN ENDNOTE LIBRARY

On the top menu select **File > New**. Save the library on your hard drive with a preferred name. Save your library by selecting the **Save as Package** checkbox. Click on **Save**.



ADD REFERENCES FROM DATABASES TO AN ENDNOTE LIBRARY

PUBMED

1. Search and select each reference needed. Select **Send To** in the top right.
2. Select **Citation manager** and choose **Create File**.
3. If using **Firefox**, choose **ResearchSoft Direct Export Helper** for direct export
4. For other browsers, choose **Save File (.nbib)** > in EndNote > go to **File** > choose **Import** > locate the .nbib file > under **Import option**, select **Pubmed** from the drop down menu > click **Import**

To export **all** search results, go to **Send To > Citation Manager** > choose **All Results** > click on **Create File** > Export

MEDLINE (OVID)

1. Search and select each reference needed. Select **Export** from the results menu bar.
2. Change **Format** to **EndNote**, change **Fields** to **Complete Reference**
3. Click **Export**. If using **Firefox**, choose **Open with ResearchSoft Direct Export Helper** for direct export
4. For other browsers, choose **Save File (.cgi)** > in Endnote > go to **File** > choose **Import** > locate the .cgi file > under **Import Option**, select **Medline OvidSP** from the drop down menu > click **Import**

To export batches up to **1000**, specify a **range of results** (e.g. 1-1000) in step 1 if you do not select references.

CINAHL (EBSCO)

1. Search and then click **Add to Folder (blue folder icon)** for each reference needed.
2. Go to **Folder** from the top menu or the right hand column.
3. Select references for export. Click **Export**.
4. Choose **Direct Export in RIS Format** and then select **Save**.

To export **All Results**, click on the **Share** menu, under Export Results: **Email a link...** > choose **RIS Format** > select **Send**. You will be e-mailed a link to a **.zip** file. Download and extract the file into a **.ris file** > **Import** into EndNote

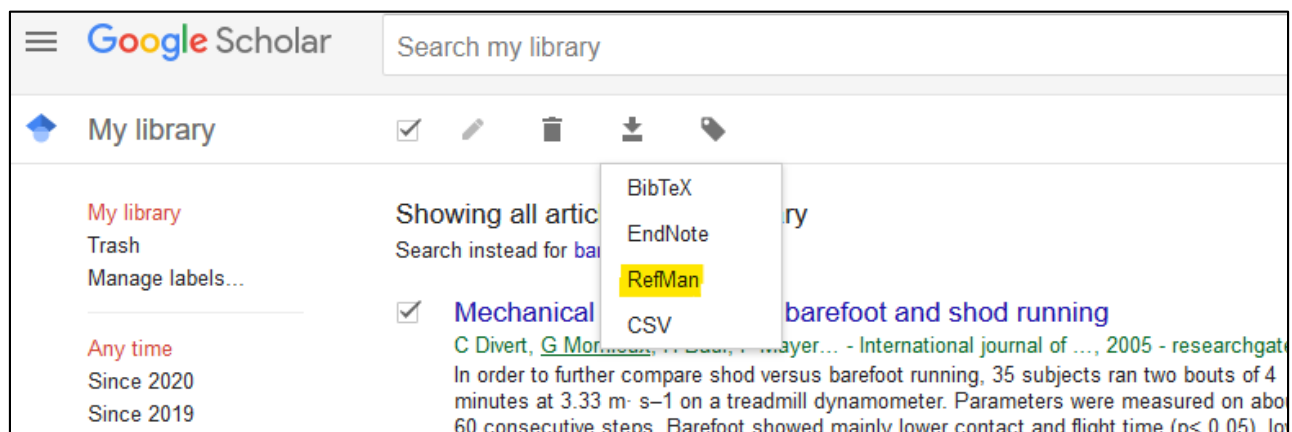
GOOGLE SCHOLAR

1. Click the **Options** button (**three horizontal lines** next to the Google Scholar logo)
2. Select the **Settings** menu, Under **Bibliography Manager**, go to **Show links to import citation into** and on the drop down menu, select **Refman**, click **Save**.
3. Perform your search and select citations to add to EndNote library. Choose **Import into Refman**.
4. Select **Open with EndNote X9** if using **Firefox** or save file and import using **.RIS** filter option.
5. You can import one reference at a time or multiple references.

You need a **Google account** to import multiple references and will need to login before selecting multiple citations. On the results lists page, choose references by clicking on the **star icon** at the bottom of each citation. The **star icon changes into blue**.



When selection is complete, go to **My Library** (top right corner). The marked references are shown. Select All references by clicking on the **square icon** and selecting **EndNote** from the **download icon**. Select **Open With Endnote X9** if using Firefox or **Save File** and import using **.RIS filter** option. References are imported to Endnote.

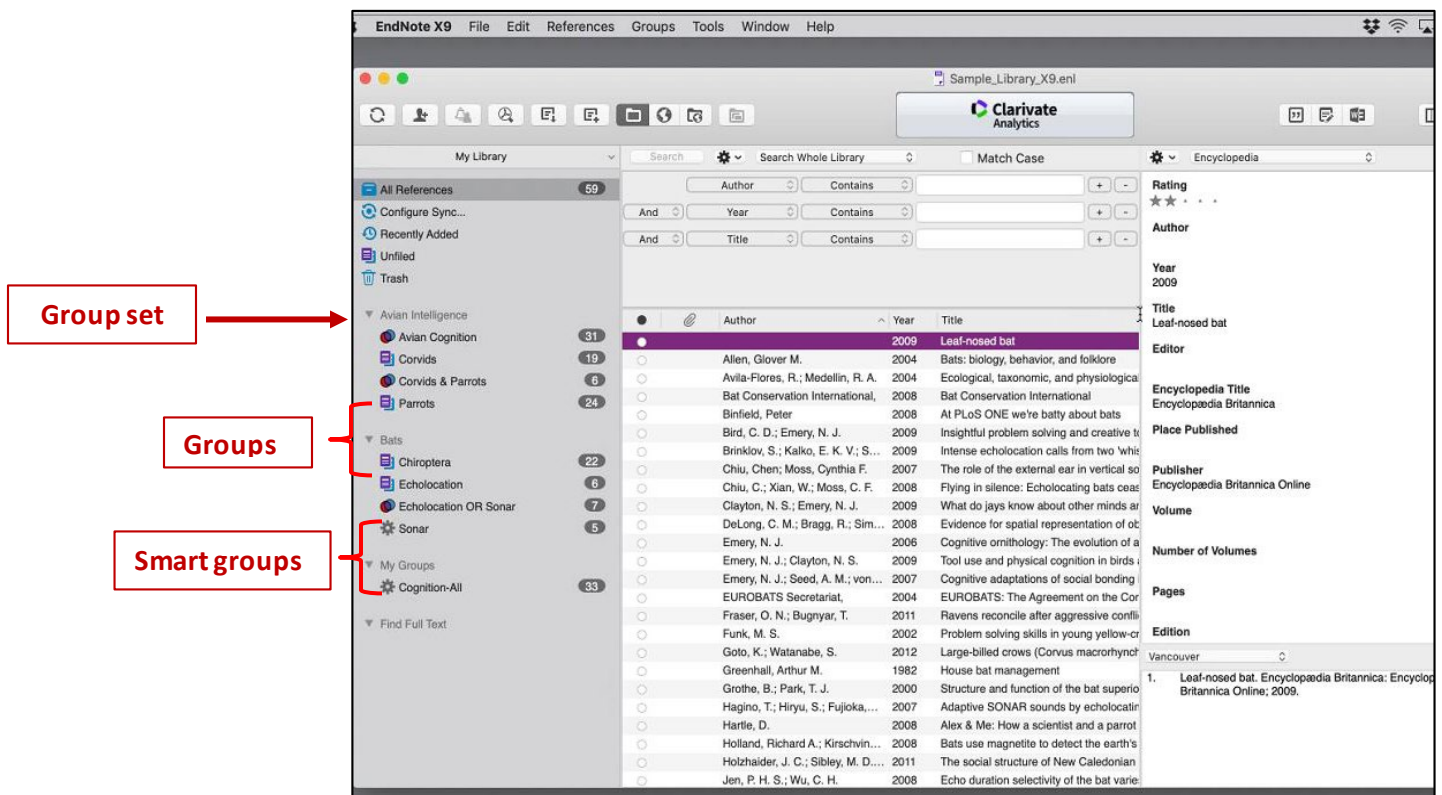


ORGANIZE REFERENCES

Make it easy to view your references by creating groups. On the top menu, select **Groups > Create Group Set or Group or Smart Group**.

IMPORT REFERENCES FROM PDFS

We recommend importing records from research databases like PubMed since this is the best way to ensure your EN records are accurate and complete. If you import PDF files, EN automatically generates EN records for each PDF, but sometimes the EN record is not complete or accurate.



ADD REFERENCES MANUALLY

Use this as a last resort if you are not able to import records from a database. Under the **References** tab > **Add New Reference** > Remember to click **Save** once all the data has been entered.

FIND DUPLICATES

On the top menu bar **References** > Find **Duplicates**. Compare references on the side by side window and decide which version to **Keep**.

To remove and track duplicates for systematic or scoping reviews check videos and step-by-step instructions on the [Systematic Reviews Skills](#) research guide.

FIND FULL-TEXT (FFT)

Within Endnote, On the **Edit** menu bar, go to **Preferences** > **Find Full Text**

Find the two **Find Full Text URL paths** from the [Citing and Writing in the Health Sciences](#) Guide

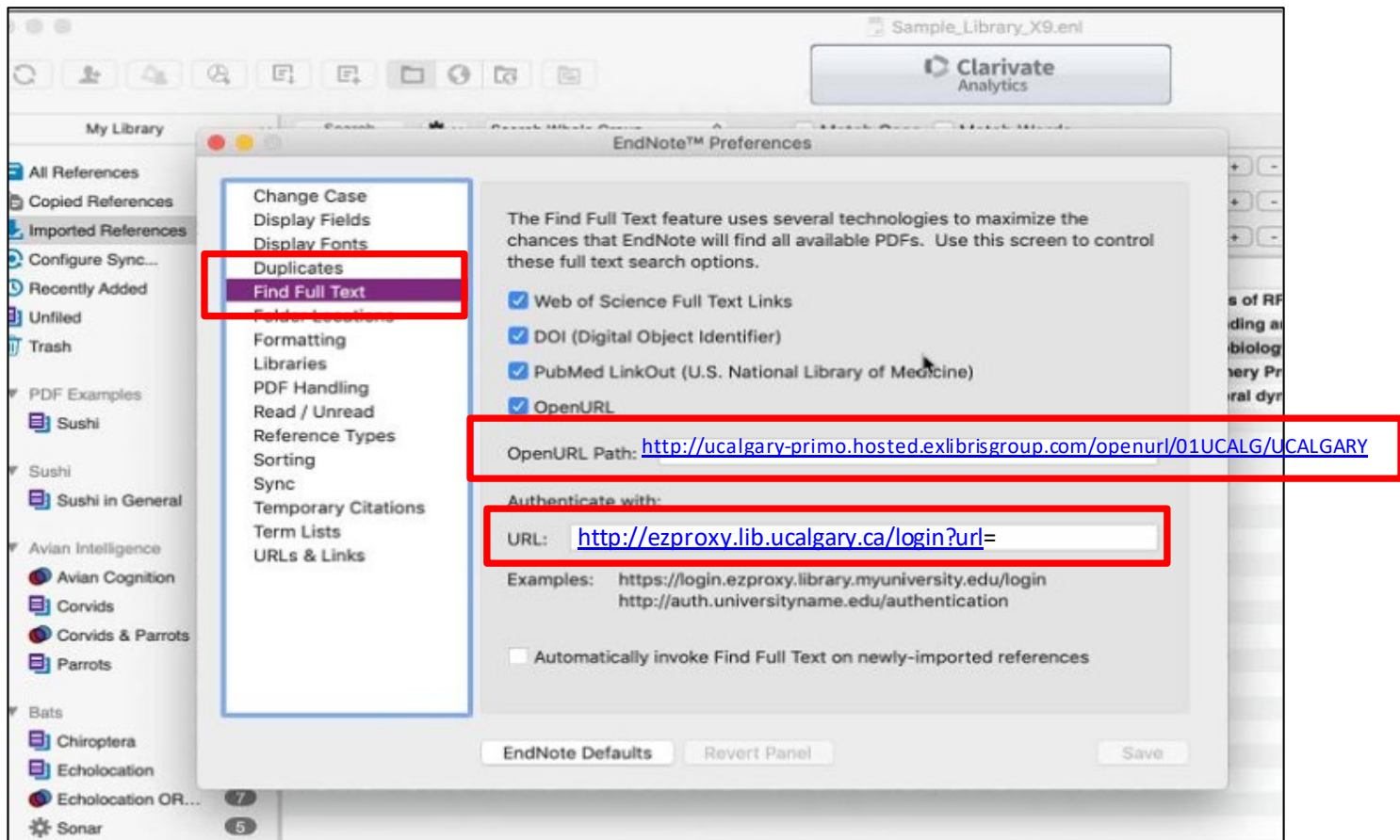
Go to the EndNote Desktop page, choose the Find Full Text tab

Copy and paste the **Open URL** path and the **Authenticate with URL** path (see below).

Click **Apply** > Click **OK**.

Open URL Path <http://ucalgary-primo.hosted.exlibrisgroup.com/openurl/01UCALG/UCALGARY>

Authenticate With URL: <http://ezproxy.lib.ucalgary.ca/login?url=>



Highlight the records in your EN library, then click on the **Find Full Text** icon on the top menu bar




USING CITE-WHILE-YOU-WRITE (CWYW)

The **CWYW plug-in** installs automatically when you load EN desktop onto your computer. Use CWYW with MS Word to insert references, edit citations and format bibliographies.

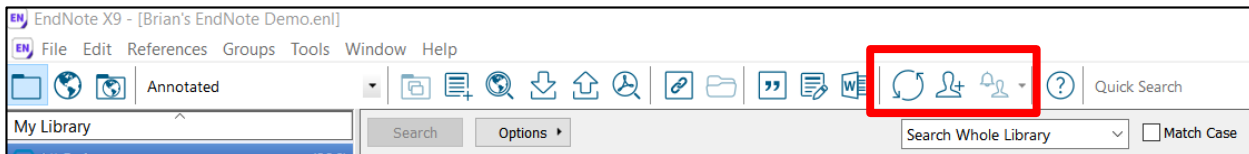
In **EN for Windows** > Within Word > go to the **Endnote tab**


In **EN for Macs** > activate a **floating Endnote toolbar**. (Use the View menu to find the toolbar option).

SHARE REFERENCES

Share Groups with Multiple Users: Highlight a **Group to share** > click on the  button > enter the email address/addresses of the people that you would invite in the **email** box > click the **Invite** button

Share an entire EN Library: From the **top menu bar** > go to **File > Compressed Library (.enlx)** > email the **.enlx file**



Activity Feed: Click on the  Activity Feed button to see changes made to your shared libraries

Copyright: U of C's licensing agreements restricts sharing only among UofC Endnote users

KEEPING YOUR ENDNOTE LIBRARIES HEALTHY

- EN libraries consist of a **.enl file** and **.data folder**. Both parts are needed for the library to work correctly
- EN libraries should **not** be stored in cloud-syncing folders such as **Dropbox, OneDrive, SugarSync** since these can corrupt EN libraries over time
- Uninstall a previous version before installing an updated Endnote program

ENDNOTE SOFTWARE SUPPORT AND TRAINING

We provide basic client support only. For in-depth support, contact [EndNote Technical Support](#)

Produced by EndNote, the [User's LibGuide](#) contains instructional information with links to resources

Find answers to common questions on the [Endnote Knowledge Base](#) portal

Consult the [Citing and Writing in the Health Sciences](#) guide for customized resources produced by the Health Sciences Library.

Feel free to connect with me personally for specific EndNote questions - [Lourdes Yturzaeta](#)

Connect with us by email: [Health Sciences Library](#)