ENDNOTE MANUAL

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(Unofficial manual)
Contents

ENDNOTE MANUAL: ......................................................................................................................... 1
PART 1: Endnote Library ................................................................................................................. 1
    Creating your library .................................................................................................................. 1
    Using Google Scholar to Import ........................................................................................... 5
        Google Scholar settings. ..................................................................................................... 9
        Google Scholar referencing issues! .................................................................................. 11
    Attaching a PDF .................................................................................................................... 14
    Manually attaching a PDF ...................................................................................................... 15
    Making notes on the attached PDF ....................................................................................... 18
    Importing from Worldshare/ Books ...................................................................................... 22
PART 2: Cite while you write ....................................................................................................... 26
    Adding a citation .................................................................................................................... 26
    Configuring Bibliography ....................................................................................................... 28
    Adding multiple authors ......................................................................................................... 29
    Editing your citation ............................................................................................................. 32
    Adding Page numbers ........................................................................................................... 33
PART 3: Additional Features ....................................................................................................... 34
    Groups ........................................................................................................................................ 34
    Syncing ..................................................................................................................................... 36
    Addendum A: Installing a new style ....................................................................................... 40
    Addendum B: Manually adding a reference ............................................................................ 43
        Guidelines on how to enter the details of the authors of a specific source: .............. 44
    Addendum C: Using the CAPTURE TOOL to add references .............................................. 46
    Addendum D: Collaboration .................................................................................................... 49
    Addendum E: Using Endnote online to CITE ........................................................................ 54
ENDNOTE MANUAL:

Downloading and installation: http://up-za.libguides.com/EndNote

PART 1: Endnote Library

Creating your library

This section will help users create a new library, and choose a referencing style.

- At the top left corner of you Endnote screen select:
  - File >> New
- Rename the library to a name of your choice and click on “save”

![Image](image1.png)

- To select a **referencing style**, click on the drop down menu at the top of your library. The default style should be on “annotated”

![Image](image2.png)

- If your style is not on the list of styles click on “Select another style”, scroll to find your style and click on “choose” when you’ve identified it.
*To install a new style please see Addendum A

- Your library should be complete and ready to use now
Using Google Scholar to Import

This section will assist with Google Scholar settings and importing references

- Using the library home page (http://www.library.up.ac.za/) search for your topic on Google Scholar

- To import a reference into Endnote click on the inverted comma symbol beneath the search result. A “Cite” pop up box should appear. Click on “Endnote”, if you are using Google Chrome as a Web Browser the download should appear as “Scholar.enw” on the bottom left corner of your screen. Click on this “Scholar.enw” download and the reference will import into Endnote.
The image above is the reference that has now been imported.
ALTERNATIVELY

If you cannot locate your downloaded file because you are using another browser (Firefox, Edge, Internet Explorer) follow these alternate steps to import a reference:

- In the top left corner of your Endnote library click on File >> import >> File.

- Click on “choose” next to “Import File” to search for the file under your “Downloads” folder and select the “Scholar” file recently downloaded.
Google Scholar settings.

- At the far left corner of Google Scholar click on the Menu. Scroll down to “Settings”

- Under “bibliography Manager” click on “Show links to import citation into ENDNOTE” and save
• The “Import into Endnote” link should appear beneath your search results
Google Scholar referencing issues!

- Please make sure that all a Google Scholar imported references are correct
- At times Google Scholar imports do not have the correct data in the correct field.
- If there are errors, click on the reference so that it’s highlighted, on the far right of the library select the “references” tab, edit the required fields and save by typing “Ctrl+S” on your keyboard.

- If the error is that the author is an organisation and it doesn’t appear correctly as seen below.
• To change this click on the references tab.
• Place a comma at the end of every organisation
• To save changes type “Ctrl+S” on your keyboard
• To view your changes click on the "Preview tab"
Attaching a PDF

- To automatically attach PDF’s select the references that you need to attach
- Click on the magnifying glass icon for “Find Full Text”

- On the left hand side of the library the progress of the search will appear

If the PDF doesn’t automatically appear and see a “Not found” message than the importing has to be done manually using the next batch of steps.
Manually attaching a PDF

- In the search result open and save the PDF you want to import.

- Go back to your search result, Click on the “Inverted comma symbol”, Click on “Endnote” and then open the “Scholar.enw” File.
Make sure the reference is highlighted and click on the clipart image on the far right.
Select the PDF file you downloaded and saved earlier

The PDF should now be attached
Making notes on the attached PDF

- On the right hand side of your reference click on the “Open PDF” button.

- The full PDF box should appear
• To **highlight text**, click on the “Highlight text” button at the top and drag over the text you wish to highlight.

• To make **sticky notes/comments**, click on the “Sticky note” tab.
  
  Place the sticky note at the area where you want to add comments.
  
  Double click on the sticky note for the comments box to appear.
  
  Add your comments.
  
  Close the comments box when finished.
Iron materials (Fe³⁺ materials) in water treatment (e.g., groundwater remediation and wastewater treatment) has resulted in the use of materials from various origins [1-5]. The early work of these materials and have been identified in the aqueous phase in the [6-15]. The earliest detailed removal by Fe³⁺ materials in the literature has been the deconcretion reaction at the surface. At the same time, several other redox reactions have been identified in the iron rust, Fe₃O₄, rust, and Fe₂O₃. Therefore, contaminant removal within the matrix of corrosion products.

In order to rationalize the hypothesis of contaminant removal at the surface of Fe³⁺ materials, the Fe³⁺ surface was arbitrarily divided into two types of sites: ‘reactive’ and ‘non-reactive’ sites [24]. Reactive sites are those where the chemical/electrochemical reaction takes place, while non-reactive sites only sorption interactions occur. This segregation implicitly neglects the fact that ‘reactive’ sites readily

Fe⁴⁺ surface have not been well understood. Knowledge in this area could provide the basis for further development of models for contaminant removal in Fe³⁺ bearing systems. Clearly, the objective of the investigation is to provide an overview of the role of the film in mediating contaminant removal in Fe³⁺-H₂O systems. The failure generally to include the main reaction path through the film’s work of Mathur and norms for categorizing and indirect reduction as well as direct reduction/removal pathways is likely due to the lack of iron rust, Fe₃O₄, rust, and Fe₂O₃. Therefore, contaminant removal within the matrix of corrosion products.

(1) Experiments are conducted to determine the effect of Fe⁴⁺ on contaminant removal...
To save your changes type “Ctrl+S”
Close the PDF when you are done making changes
Importing from Worldshare/Books

- Using the library home page (http://www.library.up.ac.za/), search for your topic under the books tab.

Search

- In the search results after finding the book you need, click on “Cite”. A pop-up box appears; click on “Export into Endnote”. A “Citation.RIS” download should appear on the bottom left corner. Click on “Citation.RIS” and the reference should appear in Endnote.
ALTERNATIVELY

- If you cannot locate your downloaded file because you are using another browser (Firefox, Edge, Internet Explorer) follow these alternate steps to import a reference
- Go to your Endnote. Go to the top left of your screen. Click on File >> import >> File.
• Click on “choose” next to “Import File” to search for the file under your “Downloads” folder and select the “Citation.RIS” file recently downloaded.

• Under “Import Option” Change “Endnote Import” to “Reference manager (RIS). Then click Import.
PART 2: Cite while you write

This section will assist with citing, creating a reference list, adding multiple authors and Page numbers.

Adding a citation
- Place your cursor in the location you want the citation to appear
- Click on the blue “Go to Endnote” button at the top left corner
- Click on the citation you want to use, click on the inverted comma for “Insert citation”
• Your Endnote should now have a citation and your reference list should appear beneath it

“Water is healthy” (Bing, 2014)

Configuring Bibliography

- To configure your reference list click on “Configure Bibliography.

- Click on the “Layout” tab, type the title under “Bibliography title” edit font, indentations and line spacing as you wish

- Click “OK” to save changes
Adding multiple authors

- On Endnote select all the authors that you want to appear. Click on “insert citation”

![Endnote screen with citations selected and inserted into the text]

(Gao et al., 2007, Chuang et al., 2006, Hori et al., 2012)

References


- To change the order of the citations, click on the citation so that they appear shaded in grey, click on “Edit and manage citations.

- Click on the “Citations” tab in order for the arrows to appear
- Click the arrows to arrange your citations in the correct order you wish for them to appear
- Click “OK” to save changes.
(Chuang et al., 2006, Gao et al., 2007, Horii et al., 2012)

References


Editing your citation

Click on the citation so that it appears as highlighted, right click, scroll down to “Edit Citation”, and select “Display as Author (Year)"

It should appear as displayed below:

According to Bergsten (2017)
Adding Page numbers

- Select the citation that you want to add the page number. Click on “edit & manage citations” Add the page number in the “Suffix” field.

- It should appear as displayed below:

“Water is healthy” (Bing, 2014:25)

(Chuang et al., 2006, Gao et al., 2007, Horii et al., 2012)

According to Bergsten (2017)
PART 3: Additional Features

Groups

- Group referencing according to themes.
- Use the “Group sets” feature as the heading,
- Create “Groups” beneath the Group sets
Right click on the Group heading select “Create Group”.
Syncing

- To sync your library with the online Endnote a user had to first register with the service by following this link: http://myendnoteweb.com

- Click on “Hide getting started guide” to see your references.
To Sync your library click on the **Sync** button and enter the same details used to register on the above link.

After the E-mail Address and password has been entered click “Ok” and all of the Endnote references will now be saved online.
Endnote important notes

EndNote X7.1 (or later) can synchronize an unlimited number of references and 5,000 groups between an EndNote Online and your EndNote Desktop library. References can also be synchronized to a second desktop computer and/or an EndNote iPad library. For the first synchronization on any device, there are several important considerations.

• Make a backup copy of your EndNote Desktop library before your first synchronization by selecting Compressed Library from the File menu. This provides a backup in case you have problems. EndNote will prompt you to create a backup, but this command can be used to create a backup of your library at any time. This backup will have a .enlx extension.

• For the first synchronization on any device, ALL references and groups will be copied in both directions. This will result in duplicates if the same references reside on the device and EndNote basic.

• All references and groups will be synchronized, but group sets, smart groups, and combination groups (group from groups) will not be displayed in your online library. Therefore, if two custom groups in an EndNote Desktop library have the same name, but are under different group sets, they will have the same name in EndNote basic, but will have no group set to distinguish them. Consider adding prefixes representing group sets to custom group names to more easily tell them apart in EndNote online before your first synchronization.

• If you synchronize to a second or third computer using EndNote X7.1 or later, all groups and group sets will appear on the second computer.

• Only one EndNote library on a device and one EndNote online account can be synchronized and shared.
Syncing is not a backup system. If you delete references or attachments from one library, they will be deleted from the other synchronized libraries with the next sync. Technical support will not be able to restore references you have deleted and then synced, so making frequent backups of your desktop library is essential.

Synchronization will always be of the complete library. There is no selective sync.

To begin syncing, click the Sync button, then follow the menus to create an EndNote online account or sign in to an existing account. It may take a very long time to sync a large library the first time, so please be patient.

**Sync Preferences**

- It is not necessary to enter e-mail addresses and password each time you synchronize your references between EndNote Desktop and EndNote Online.
- EndNote automatically begins the Sync process every 15 minutes (background processing) by selecting the Sync Automatically check box.

**Note:** To access Sync Preference, go to **Edit**, Select **Preferences**, and then click **Sync** in the list of preferences.
Addendum A: Installing a new style

Download one of our Harvard styles using this link: http://up-za.libguides.com/c.php?g=709989&p=5045818

- Double click on the style so that it opens up on Endnote.

- It should look like the image below:

- Go to “file”, “Save as”: 
• Remove the “copy” text and click on save.

• In your library click on the drop down menu and then choose the option to “Select another style”
• Scroll down the options until you find “Harvard Civil edited”
Addendum B: Manually adding a reference

- Click on “References” followed by “New Reference”

- Change “Reference type to “Unpublished work” or “book” or “Journal article”
Guidelines on how to enter the details of the authors of a specific source:

- For corporate authors (i.e., organisations or official bodies) put a comma at the end of the name so that the name of the organisation is treated in the same way as a surname, e.g. European Commission,

- Author names may be entered in two ways: either First Middle Last such as Carol Jane Jacobs or Last, First Middle such as Jacobs, Carol Jane. Individual author names must be entered one per line, using the **Enter key after each name**.

- Only one author name must be entered per line.

- When entering initials instead of full names, make sure there is a space between each initial. For example: Smith, J A

- Press the Tab key to accept the author name and move to the Year field. Type the year and press the Tab key to move to the next field.

- Do a **spell check** on the references. In the case of a book, enter the edition in the “Edition” field as 2nd, 3rd, 4th, etc. Because the first edition of a book is not referenced as such, it is not necessary to indicate a first edition with 1st in the “Edition” field

- Close the “New reference page” and say yes to saving
Addendum C: Using the CAPTURE TOOL to add references

- To use the Capture tool log into your Endnote online account
- Click on the “Download tab”

![Image of EndNote interface]

- To install the Capture tool, just drag the **Capture Reference** button to your Bookmarks bar (also known as “Favorites Bar” or “Bookmarks Toolbar”). In some browsers, you may need to right-click and select “Add to Favorites” or “Bookmark This Link.”

To use it, browse to a page you like and click the **Capture Reference** button in the Bookmarks bar. The Capture Reference window will open. Follow the instructions in the window.
• The capture reference window (as seen in red) appears every time you click on the “Capture reference” bookmark.
• Users can toggle between saving the reference on their online Endnote or the desktop version.
• Manually fill in any fields that are missing ie “Reference type and Author”

• A “RIS” file should start downloading
• Click on the file to open it on Endnote
- Your Endnote reference should appear under "Imported reference"
Addendum D: Collaboration

- Endnote allows for the sharing of references through the MyEndnoteweb.
- Before sharing make sure the other collaborator has registered with MyEndnoteweb and has successfully set up their library.

On MyEndnoteweb hover above the "Organize" link.
Four tabs will appear, click on the "Manage My Groups" tab.
• Click on “New groups”

• A window will appear prompting for the creation and renaming of the group.
• When the group has been created click on “Manage Sharing”

• Click on “Start sharing this group”
A pop up window should appear
Enter the email address of the person you wish to collaborate with
Make sure that is the same email address that person has registered with MyEndnoteweb
Choose between “Read only” or “Read & Write” depending on the rights that you want the collaborator to have.
Apply changes and Close window to complete the action.

**Note:** Attachments are not shared, regardless of access privileges.
Note: Attachments are not shared, regardless of access privileges.

- The email address of the collaborator should appear under the “manage sharing” groups.

- To add references to the shared group select each reference by ticking the check in box on the left of each reference
- Add to the group by selecting the drop down menu and slick on the shared group.
- The references should now appear on the group located on the left.
Addendum E: Using Endnote online to CITE

- To cite using the online version of Endnote go to the Endnote X8 tab in Microsoft Word

- Select Preferences to make changes
• Under “Application” change Endnote to Endnote online
• The left part of the Endnote X8 tab should change

• To insert a reference click on “insert Citation”, search for the author and insert the citation.
(Dai et al., 2016)

References
