This guide provides step by step instructions on learning the basics of EndNote X9, importing records from the IWU Library Catalog and other databases available through OCLS, troubleshooting tips, and more.

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Learning EndNote X9

Thomson Reuters, the creators of EndNote, provide teaching aids for EndNote and they are willing to provide support.

- EndNote x9 LibGuide – One stop for tutorials, guides, videos, and FAQs. [https://clarivate.libguides.com/endnote_training/users/enx9](https://clarivate.libguides.com/endnote_training/users/enx9)

Many universities have provided wonderful getting started documentation, tutorials, and videos. Google “EndNote X9 libguide.” Just keep in mind that directions may be written specifically to that university/school campus community and would not apply to IWU.

- Rutgers University Libraries, EndNote x9 [https://ocls.indwes.edu/EndNote/EndNoteHelp.html](https://ocls.indwes.edu/EndNote/EndNoteHelp.html)
- Brown University Library, EndNote [https://libguides.brown.edu/endnote](https://libguides.brown.edu/endnote)

Off Campus Library Services has helps for Indiana Wesleyan University faculty and students.

- OCLS EndNote Help Page [https://ocls.indwes.edu/EndNote/EndNoteHelp.html](https://ocls.indwes.edu/EndNote/EndNoteHelp.html)
Getting Started

Downloading EndNote X9

- You can download EndNote through the OCLS license here: https://ocls.indwes.edu/EndNote
- Click EndNote Downloads
- Log in with your myIWU portal information
- Download EndNote X9 for Windows or Mac

Registering EndNote x9

- Open EndNote X9
- Windows: In the menu click Edit and select Preferences. Click Enable Sync. Choose Sign Up. Register with your email address and create a password.
- Mac: Go to the EndNote menu and choose Preferences. Select Sync and then choose Enable Sync. Choose Sign Up. Register with your email address and create a password.

Creating EndNote Library

- Open EndNote X9
- In the menu click File and choose New...
- EndNote will name the library My EndNote Library, but the name can be changed.
- Click Save to save the new library.
- Do not save the library in any cloud syncing folder (e.g. Dropbox, Google Drive, OneDrive, or iCloud). Syncing folders will corrupt the EndNote Library.
- Do not save the library to a network drive or folder.
- The EndNote Library should be kept on your computer's hard drive.
Choosing the Right Style Output

- After doing all the software updates to the latest version, EndNote provides a good (not 100% accurate) APA citation template.
- It needs to be selected for both the output style and the Cite While You Write formatting.
- There are a few of the source templates that need to be edited to conform with APA 6th edition and APA 7th edition.
- Please note that the APA style is a very complex style. EndNote can handle most of the requirements of this style, but EndNote does not include the full spectrum of reference types that are described in the APA manual. If you are citing a reference type that is not included in EndNote, you should consult the APA manual. You may need to add or modify your own reference types, if so you can follow the instructions in the help file under "Adding and Deleting Reference Types."

APA 6th Edition Output Style


APA 7th Edition Output Style


Installing Styles

- Download the style you want to install. It will download to your designated downloads folder.
• Open the folder where the style downloaded. Double click the style file (.ens). It should open in EndNote.
• In EndNote, in the menu click File and choose Save As.
• In the Save As box, replace the word “copy” with your style’s name and click Save.
• In the menu click File and choose Close Style.

Selecting Output Style

• In the menu click Edit, go to Output Styles, and choose Open Style Manager...
• Select the style you just saved and close out of the EndNote Styles window.
• The style will now be available for you to select as your output style.
• In the menu click Edit, go to Output Styles, and choose your output style from the list.

Importing Records from the IWU Library Catalog

Setting Up the Connection

• Please note, that you only should have to do this once.
• Open EndNote X9
• In the menu click Edit
• Select Connection Files and click Open Connection Manager...
• Scroll down the list and check mark Indiana Wesleyan U. and close the window.
• If Indiana Wesleyan is not in the list, you can create a connection.
  o In the menu click Edit
  o Select Connection Files and click New Connection...
  o On the screen that pops up, type in the following information:
    • Category: Library Catalogs
    • Comments and limitations: IWU Library Catalog
  o From the left-hand menu click on Connection Settings:
    • Information Provider: Indiana Wesleyan University
    • Sever Address: oak.indwes.edu
- Database: Library Catalog
- Database Name: INNOPAC
- Record Syntax: choose OPAC from the drop-down list
  - Close the window and you will get a message that says: Save changes to the EndNote connection file “Untitled Connection” before closing? Click Yes.
  - In the Save As box, rename your connection: IWU Library Catalog
- To add IWU Library Catalog to your connections
  - In the menu click Edit
  - Select Connection Files and click Open Connection Manager...
  - Scroll down the list and check mark Indiana Wesleyan U. and close the window.
- The connection will be on the Online Search list.

Importing Records from the Catalog

- From the main EndNote screen, click the Integrated Library & Online Search Mode icon.
- You will see a search area, but you need to select which library to search.
- On the left side of the screen and under Online Search click and select IWU Library Catalog.
- Now, when you are ready to search the IWU Library Catalog.
- Fill in the necessary fields. You can search by author, title, keywords, etc.
- Click Search.
• When you search, EndNote will pop up a **Confirm Online Search** box with how many records were found.

![Confirm Online Search Box](image)

• Click **OK**.
• The search results will come up.
• Your new citations will be downloaded.

**Saving Citations to Your EndNote Library**

• Citations retrieved from an **Integrated Library & Online Search Mode** search are automatically saved to the **Unfiled** folder. To make your citations easier to find you may want to create a group for your citations.
• Citations retrieved from an **Online Search Mode** search are not automatically saved. You will need to save these to your EndNote library.

  o Select the citations you want from the list.
  o Click the **Copy to Local Library** button.
  o Click the **Local Library Mode** button to see the contents of your EndNote Library.
  o The citations you just copied are shown in the temporary **Copied References** group. You will need to save these citations to a permanent group.
Creating Groups

- In the menu click **Groups** and select **Create Group**.
- Enter the name of your group and press Enter.

- Select the citations to add to the new group and drag them into the group.

Transferring to a New Computer

- You can follow the above steps and set up a new connection or you can transfer the connection files to your new computer.
- Do a search on your computer for the name of the connection you created for the IWU Library with an .enz extension and the EndNote logo.
- In this example, the connection was named IWU Library Catalog. This search was done on Windows 10.
• Locate where it is saved on your computer.

  ![Image of file location]

  • Click the **Location** or **Open file location** and the folder where the file is will automatically open.

  ![Image of file location]

  • Copy the file and save it to a USB drive.
  • Copy the file to a Connections folder in the same location on your new computer.
  • From the main EndNote screen, click the **Integrated Library & Online Search Mode** icon.

  ![Image of EndNote main screen]
• On the left side of the screen and under Online Search click more...
• Locate your IWU Library Connection, select it and click Choose.

This connect should now be set up for your 2nd computer.

**Downloading from OCLS Databases**

**Downloading from EBSCOhost Databases**

EBSCOhost databases include: Business Source Complete, Academic Search Complete, CINAHL, Health Source, ERIC, Professional Development Collection, ATLAS, Christian Periodical Index, Communication & Mass Media, and more.

**EndNote X9 Method**

• Open your EndNote library that you want to populate.
• Search the EBSCO database.
• Click the folder icon beside the article title to add articles to your my EBSCOhost folder.
- In the top menu click **Folder** to view your EBSCOhost folder.
- Select the articles you want to download.
- Click the **Export** button on the right side of the screen.

![Export Manager](image)

- Be sure that **Direct Export in RIS Format (e.g. CITAVI, EasyBib, EndNote, ProCite, Reference Manager, Zotero)** is select (it is the default choice).
- You may or may not want to uncheck **Remove these items from folder after saving**.
- Click **Save** and the RIS file will download to your computer.
- Click on the downloaded file in the downloads bar at the bottom of the browser window or bring up the file location and double-click on the file to open the file in EndNote.
- The new citations should populate in your EndNote Library and will be in the **Imported References** temporary group.
- Select, drag, and drop the citations into your permanent group folder.
EndNote Web Method

- Search the EBSCO database.
- Click the folder icon beside the article title to add articles to your my EBSCOhost folder.
- In the top menu click Folder to view your EBSCOhost folder.
- Select the articles you want to download.
- Click the Export button on the right side of the screen.
- Select the 2nd option Direct Export to EndNote Web.
- You may or may not want to uncheck Remove these items from folder after saving.
- Click Save and the citations should immediately populate to EndNote Web.

Downloading from ProQuest Databases

ProQuest databases include: ABI Inform, Education Journals, Nursing & Allied Health Source Journals, Dissertations & Theses, and more.

- Open your EndNote library that you want to populate.
- Search the ProQuest database.
- Select the citations that you want to save.
- Click the folder icon in the top right corner of the page.
- Select the All save options icon.
- Select RIS (EndNote, Citavi, etc.).
- The Export/Save window will pop up. Click Continue.
• Click on the downloaded file in the downloads bar at the bottom of the browser window or bring up the file location and double-click on the file to open the file in EndNote.
• The new citations should populate in your EndNote Library and will be in the **Imported References** temporary group.
• Select, drag, and drop the citations into your permanent group folder.

**Downloading from JSTOR**

• Open your EndNote library that you want to populate.
• Search the JSTOR database.
• Select the citations that you want to save.
• Click the **Export Select Citations** box to the right above the citations list.
• Choose **Export a RIS file (For EndNote, ProCite, Reference Manager, Zotero, Mendeley...)**.

![Export Selected Citations](image)

• Click on the downloaded file in the downloads bar at the bottom of the browser window or bring up the file location and double-click on the file to open the file in EndNote.
• The new citations should populate in your EndNote Library and will be in the **Imported References** temporary group.
• Select, drag, and drop the citations into your permanent group folder.

**Downloading from Emerald Insight**

• Open your EndNote library that you want to populate.
- Search the Emerald Insight database.
- Emerald Insight does not allow you to select multiple citations at once.
- When you find an article citation you to save click on the article title.
- On the article landing page scroll down until you see the Keywords section. Under the keywords you will find the Citation.
- Under Citation click Download as .RIS.

  [Download as .RIS]

- Click on the downloaded file in the downloads bar at the bottom of the browser window or bring up the file location and double-click on the file to open the file in EndNote.
- The new citations should populate in your EndNote Library and will be in the Imported References temporary group.
- Select, drag, and drop the citations into your permanent group folder.

**Downloading from Google Scholar**

- Go to https://scholar.google.com/
- Click on the hamburger menu in the top left corner.
- Click on Settings.
- This should take you to the Search results settings.
- Find the Bibliography manager section.
- Select the option Show link to import citations into
- Select EndNote from the drop down.
- Click Save.

  ![Bibliography manager]

- Do your search.
- When you see an item to download, click on Import into EndNote.
• Click on the downloaded file in the downloads bar at the bottom of the browser window or bring up the file location and double-click on the file to open the file in EndNote.
• The new citations should populate in your EndNote Library and will be in the **Imported References** temporary group.
• Select, drag, and drop the citations into your permanent group folder.
• Expect to do some editing to make the citation conform to APA.
• You only need to set this up once unless you change computers.

**Downloading from WorldCat™**

• Go to [https://www.worldcat.org/advancedsearch](https://www.worldcat.org/advancedsearch)
• Do your search using any of the fields provided.
• Click on the title and look at the full citation.
• Click on **Cite/Export**.

• Click on **Export to EndNote / Reference Manager**.
Click on the downloaded file in the downloads bar at the bottom of the browser window or bring up the file location and double-click on the file to open the file in EndNote.

The new citations should populate in your EndNote Library and will be in the **Imported References** temporary group.

Select, drag, and drop the citations into your permanent group folder.

## Finding Full Text at IWU

Setting this up in your software allows you to click on a citation and it *should* take you to the citation for that source, if it is either open source or you can get it by logging into the library databases.

1. Open EndNote X9.
2. In the menu click **Edit** and choose **Preferences**.
3. Select **URLs & Links** from the left-hand menu.
4. Edit the **OpenURL Arguments** box:
   - If there is already content similar to what’s below in the box, only change **WoS** to **EndNote**.

![OpenURL Arguments](image)
If the box is blank, then type the following exactly:

```
?sid=ISI:EndNote&aufirst=AUFIRST&aulast=AULAST&issn=ISSN&isbn=ISBN&atitle=ATITLE
&title=TITLE&volume=VOLUME&issue=ISSUE&date=DATE&spage=SPAGE&epage=EPAGE
```

Click **Apply**.

- Now, select **Find Full Text** from the EndNote Preferences left-hand menu.
- Check mark all the options.
- In the **OpenURL Path** box type:

```
uid&group=main&profile=ocls
```

- In the **Authenticate with** box type:

```
http://o-resolver.ebscohost.com.oak.indwes.edu/openurl
```

Now, when you have a citation highlighted you can type **CTRL + G** or right-click the citation, go to **URL** and select **Open URL**. This should take you to the record in the database and you can download full text or add a link to the full text.

**Working with Cite While You Write (CWYW)**

- If you Google “CWYW youtube,” you will get several hits that allow you to view different renderings of how to use this feature. Watch ones that are dated 2013 or later. It is based on version X6, but that feature has not changed.

**Editing Citations**
• Expect to edit your citations to conform to APA. For example, you will likely have to remove caps from titles so that they are all small case. You may need to remove Article from the Type of Article field.
  o Double click on the citation.
  o Click on the information you want to change or delete.
  o Make your edits.
  o Close the window by clicking the x or typing CTRL + W.
  o A message will pop up asking if you want to save the changes made to the reference. Click Yes.

Inserting Citations into Word

• Open your Word Document and begin writing your paper.
• When you are ready to insert a reference go to the ribbon and click EndNote X9.
  o Click the drop-down menu beside Insert Citation.
  o Depending on what you need to do, click on that option.
  o If you already have a citation highlighted in EndNote select Insert Selected Citation(s).
  o If you need to search for the needed citation click Find Citation.
  o The in-text citation and the accompanying Reference entry will populate.

Double Spacing References
• You will need to double space your entries to conform to APA Style format for References.
• From the EndNote X9 ribbon click the arrow beside Bibliography (the dialog box launcher).

![Bibliography dialog box](image)

• Click on the Layout tab.
• Change the Line spacing drop down to Double and click OK.
• It will adjust any References you have entered.

Editing In-Text Citations

• If you need to edit an in-text citation do not edit the citation in your Word Document.
• Instead use the Edit Citation option from the EndNote X9 ribbon.
• Highlight the one you need to edit and click the Edit Citation tab at the bottom of the screen.
• You can select other options for the look of your in-text citation.

Cannot Access the CWYW Option in Word (2013/2019)

• Sometimes for mysterious reasons, your toolbar option gets disabled in Word so that you no longer can enjoy the freedom of CWYW.
• You see that it is there, but not accessible, then it likely has been disabled in Word. Follow these steps in Word 2013/2019:
  o Go to File.
  o Go to the bottom and click Options in the left menu.
  o From the Word Options left menu select Add-ins.
  o Scroll down to the bottom of the list to see Disabled Application Add-ins. You should see EndNote under the Disabled Add-ins list.
  o Use the Manage drop-down at the bottom of the window, select Disabled Items and click Go...
Follow the prompts to select EndNote and **Enable** it.
Now it should show up as an active item on your Word ribbon.

**Setting Up EndNote Online**

- Open EndNote X9.
- In the menu click **Help** and choose **EndNote online**.
- If you do not have an account, click Register. If you already have an account login.
- Make sure you log in with the same information you used to register EndNote X9.
- You may need to update your sync preferences.
  - In the menu click **Edit**, click **Preferences**..., and select **Sync** from the left-hand menu.
  - Make sure your **EndNote Account Credentials** are correct.
  - Retype the password and click **Apply**. This will authenticate your account.
- From the EndNote X9 toolbar click the Sync Library icon.
- Your local library and your EndNote Online account will be synced.

**Adding PDF Documents to Individual Citations**

**Find Full Text**

If you have downloaded article citations that you know have full text in the database then follow these steps:

- Click and highlight the citation.
- Click the **Find Full Text** icon in the toolbar.
- If the full text could be found your citation will show up with a paper clip.

**Article URL**
Some databases, such as ScienceDirect or EBSCOhost databases such as CINAHL, APA PsycInfo, or OCLS QUICKsearch, provide a URL that will take you to the full text instead of providing you a PDF.

Double click on the citation to bring up the citation information.

Scroll down until you find the URL.

There may be more than one URL listed. Be sure to click on the link that looks like the first link in the image below. This link will take you directly to the article in the OCLS database.

If there is no URL listed close the article information window. Select the citation from the list and click the Find Full Text icon in the toolbar.

**Manually Attach PDF**

- If the full text is not found using Find Full Text, then you can manually attach the PDF to your citation.
- Download the article PDF from the OCLS database.
- Double click on the citation to bring up the citation information.
- Click the Paper Clip icon and locate the file where it is saved on your computer.
- Remember to save the changes to the citation record.
Reading and Editing PDF

- When you click on the citation you can read the article, search the article, highlight, and attach sticky notes.
- Remember to save changes to the PDF to keep any highlighting or notes.
Submitting a Paper after Editing

Does your paper “change” when it is transferred to another person’s computer? Here is how to retain your formatting for other readers.

This process removes the field codes that EndNote uses in Word and connections to EndNote.

- Make a copy of your paper. This will be the copy to submit. There are two ways this can be done.
  - **Word:** With the file open of your document copy, select the entire document (Ctrl A), then hit Ctrl 6. This removes the field codes but seems to leave everything in place. Double check your paper to be sure everything looks as it should. Since there are no field codes, you can edit at will.
  - **EndNote Ribbon:** In the later versions of EndNote, you can use the EndNote ribbon in Word. Click on the dropdown beside Convert Citations and Bibliography. Then click on: Convert to Unformatted Citations.

The reason you want to do this on a copy instead of your original is because once you remove the EndNote field coding you cannot reverse the process. Your copy will not be associated again with your EndNote library.

Transferring a Paper for Editing

The editor will have to have EndNote available, too, and it should be the same version as the writer. To keep the integrity of the writer’s library, the entire library should be sent. This can be done by sending a **compressed library**.

- **Original Author**
  - Open EndNote X9.
• In the menu click **File** and choose **Compressed Library (.enlx)**...

![Compressed Library (.enlx)](image)

• Select whether you want to send with or without file attachments (PDFs, figures, etc.)
• Select **All References in Library**
• Then click **Next**.
• Save the .enlx Library with your other Libraries.
• Send the .enlx Library and your **Word document** to the editor/collaborator.

**Editor/Collaborator**
- Save and move the .enlx Library to your folder for EndNote Libraries.
- Open EndNote X9 and open the .enlx Library as you would any other EndNote library.
- When you are ready to return the document and Library, compress it again by following the steps above.

**It is best for the Original Author to accept the new library and work from it. That allows the Editor/Collaborator to make edits in the EndNote Library and/or add new citations.**

If the Editor/Collaborator only added new citations, there is another method to transfer those to the Original Author’s library without replacing it.

• In the menu click **Edit** and select **Preferences**. Click **Display Fields**.
For **Column 8**, change the drop down to **Record Number** so that they are sorted in order.

- **Click OK.**
- In the library click on the column header for **Record Number** so they are sorted in order.
- If you do not see a Record Number column, right click on the library column headers and make sure **Record Number** is checked.
- Compare libraries and drag any new citations to the original library.
- **This should not be done, if there was any possibility of editing the Library itself, e.g. Output Styles.**

### Backing Up Your Library

It is important that you back up your EndNote Library.

- Open EndNote X9.
- In the menu click **File** and choose **Compressed Library (.enlx)...**
- Select **With File Attachments**.
- Select **All References in Library**
- Then click **Next**.
- Save the .enlx Library with your other Libraries or in a new place (e.g. USB flash drive, Google Drive, OneDrive, Dropbox, etc.)
- You open the .enlx library just as any other library and it will extract the entries and you will have a copy that mirrors your library at the point of making the copy.
- **Do this often!**

### Creating Only a Bibliography (No In Text Citations)

There are occasions that you want a list of references, but do not need in text citations, e.g. vitae, creating a bibliography for a class, copying and pasting to a PowerPoint slide, etc. These can be easily done from your EndNote library.

- Highlight the items in your library that you want to use in the bibliography. This may be all the entries in a group or selected references in your library.
- Be sure you have selected the Output Style you want to use, e.g. APA 7th.
- Go to the toolbar and click **Edit.**
• Click **Copy Formatted**.
• Then go to your Word document or PowerPoint slide and place the cursor where you want to insert the bibliography.
• Paste the copied references. (CRTL + V or right-click > Paste)
• You may need to do some formatting to get double spacing, hanging indent, italics, etc. in the right place. Word and PowerPoint have the option to Keep Source Formatting (right-click) that will keep the copied format from EndNote.

• Because you did not use the Cite While Your Write feature of EndNote, this bibliography will not be connected to your EndNote program. So, any editing you do to the citations will not be reflected in your library.

**Citation Will Not Format Correctly**

Sometimes no matter how much you try to edit the template, it still does not reflect correct APA formatting per the 7th ed. You cannot edit the citation in Word as it will always revert to how it is in the database as the CWYW citation is pulling fields from the database.

You can remove all the EndNote coding per the instructions of the section, Submitting a Paper after Editing, however, this also removes all connections to your library for future editing. Here is a way you can edit the citation but keep the connection to your library:

**For a single-reference citation:**

- Insert the citation into Word as you normally would.
- Position your cursor right next to that citation, being careful to stay outside the EndNote field codes, and manually type in the citation as it should appear.
- Click in the citation to select it, then click the **Edit & Manage Citation(s)** button in Word on Windows or select Edit & Manage Citations from the drop-down Citation menu on Macintosh.
- With the citation selected in the Edit & Manage Citation(s) window, on the **Edit Citation tab**, change the Formatting option from Default to **Show Only in Bibliography**. This will hide the EndNote citation, but you will know it is right next to the manual citation in case you need to find it.
For a grouped citation:

- Insert the citation into Word as you normally would.
- Click in the citation to select it, then click the **Edit & Manage Citation(s)** in Word on Windows or select it from the drop-down Citation menu on Macintosh.
- Add the citation text as it should appear as a suffix to the citation in the group that precedes it if it is not the first citation. If it is the first citation in the group, add it as prefix text to the citation that follows it.
- Select the citation and change the Formatting option from Default to **Show Only in Bibliography**. This will hide the EndNote version of the citation, but it would still appear in the bibliography as it should with the title replacing the author.

**Adding Value to your EndNote™ Library**

Use the notes field and add comments such as:

- What chapter (dissertation) will this support?
- What argument does it support?
- What pages have the most important information?
- Who referred you to this source?
- Any keywords (tagging) that will help you remember this source.
- Where your print copy is located? Electronic copy?
- Can you attach the PDF file for easy access later?
- Important quotations (with page numbers) for later use.
A Final Word of Caution

With all of these, there can be glitches in all the fields importing. You may have to go back to your text file and enter the missing data, e.g. journal name. But this can be a quick process with copy and paste.

Now is the time, before you forget about why these citations were important, that you should look carefully at each one, compare them to the download file and make sure all necessary information is included. Then add your own keywords. Try as much as possible to be consistent with your keywords or tagging. For example, if you say an article is about downsizing then always use that keyword for any sources about that topic. Do not change two months down the road and start using restructuring. This way when you are looking for sources that you may have entered in your library months ago, you can at least easily pull up all the sources that you feel discuss downsizing.

Create your own “thesaurus” in a WORD document or EXCEL spreadsheet (this one is sortable by alphabet) and keep this list handy as you work with importing new sources.