Information Literacy Program

EndNote for iPad
Quick Reference Guide
2016
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Introduction

This guide is a condensed version of the ANU Library’s Online Guide to EndNote for iPad, and is intended to be a handy “quick reference” aid to the application’s basic functions and operations. The unabridged version of this guide may be accessed at libguides.anu.edu.au/endnotehowtoguide.

Getting started

What is EndNote?

EndNote is a:

- reference and full text organiser with a collaborative web tool called EndNote Online
- bibliography maker
- online search tool. It retrieves references directly into an EndNote library and performs direct imports of references from many online resources into an EndNote created library file
- online collaboration tool

Tip: While it is possible to use multiple EndNote libraries for one document, it is recommended you work from a single library and use Groups instead.

ANU site licence and how to install EndNote

EndNote is available for students and staff to use while studying or working at ANU.

It is installed on all Information Commons computers and can be downloaded from ANU Online (ql.anu.edu.au/gm0l) for use on your home computer. If you would like to download EndNote from ANU Online:

1. Log in to ANU Online (wattle.anu.edu.au) using your ANU ID and password
2. Search for EndNote using the search box at the bottom of the page
3. Select the EndNote course and accept to be enrolled
4. The files for download are available under the Download EndNote Software heading. Please follow the instructions carefully.

Tip: A product key will not be required if users follow installation instructions correctly.

EndNote for iPad

An EndNote app is available for iPads from the iTunes App Store. It

- provides tools for searching, organising and sharing your research
- extends your ability to collect, collaborate, and create from anywhere.

All references will be sent to your EndNote Online library, from where they can be synchronised with your local library on your computer.

Full text PDF files can be attached to references and annotated on your iPad.

More information and help:

- EndNote app for iPad course notes (by ANU Library) at ql.anu.edu.au/c7wb
- EndNote for iPad Getting Started Guide (by EndNote) at ql.anu.edu.au/ujlg
- EndNote website (noting FAQs, videos and the User Forum at the bottom of the page) at endnote.com
Create records

To download and create records from online sources simply use the app’s In-App Browser. To access the In-App Browser select the cog icon in the banner at the lower left of the page.

To make things a little easier, you can set the homepage of the In-App Browser to your favourite catalogue (for example the ANU Library) or online database (for example Medline, JStor). To set the homepage, select the Web button in the banner at the top of the page and enter the website URL in the Homepage text box.

Below are three examples of how to download and create records using different online sources.

SuperSearch

Follow the below steps to automatically add records from your SuperSearch results list to EndNote’s All References group.

In the below example we will search using the keyword Malaria the In-App Browser. To do this:

1. Open the In-App Browser and navigate to the Library homepage.
2. Type Malaria into the SuperSearch search box and select Search.

Tip: For more information on searching visit our Topic Analysis How To guide.

3. Select the folder (with + sign) alongside the results you wish to mark for download. Repeat this process as often as required for other records.
4. When you have finished marking your results for download, select the Marked Records folder (the blue folder) in the top SuperSearch banner. The Saved Items list will then be displayed.
5. On the Saved Items list, select EndNote from the Export As drop-down list.
6. Select Import to EndNote on the Download Options bar.
7. On the Add Items to EndNote dialog box, confirm the addition of those records to your EndNote library by selecting Yes.
   Your records will be added to My Library and to the Unfiled group.
8. Select Done.
9. Select some of the newly imported references and check that the information has been transferred correctly.

Note: If the downloaded file is still saved in Downloads it can be deleted from there.

Google Scholar

In the below example we will use the In-App Browser to import records directly from Google Scholar. To do this:

1. Select the Web button to access the In-App Browser.
2. Type scholar.google.com in the browser’s address field. Select Done.
3. Type a search term in the search box and select the blue button. In this example we will use kangaroo as our search term.
4. To add a reference from the search results to your library, select Cite within the relevant record.

Note: you can only add one reference at a time. Repeat the above steps for each reference you want to add to your library.

5. Select EndNote from the pop-up box.
6. Select Import to EndNote on the Download Options bar.
7. On the Add Items to EndNote dialog box, confirm the addition of those records to your EndNote library by selecting Yes.
   Your records will be added to My Library and to the Unfiled group.
**Online databases**

In the below example we will use In-App Browser to import records directly from selected online databases.

To do this select the **Web** button and enter **anulib.anu.edu.au** to go to the Library’s homepage.

**Example 1. Web of Science**

1. Using the In-App Browser, select **W** from the A-Z listing of **E-resources and databases** on the ANU Library homepage, and then select **Web of Science**.
2. Perform your search.
3. On the search results page mark the required references for export by placing ticks in the boxes beside them.
4. From the drop-down list above the search results, select **Save to EndNote desktop**.

  **Tip:** Records from consecutive searches can be added to the **Marked List** and exported from there if needed. To export records from the Marked List, select the **Marked List** tab directly below the **Web of Science** banner.

5. From the **Send to EndNote** pop-up box, select the content you would like to send from the drop-down list. Select **Send**.
6. Select **Import to EndNote** on the download options bar.
7. On the **Add Items to EndNote** dialog box, confirm the addition of those records to your EndNote library by selecting **Yes**.

Your references will be added to **My Library** and to the **Unfiled** group.

  **Tip:** Select the newly imported reference to check that the information has been transferred correctly. If the selected records have not been imported select the downloaded file in **Downloads** and confirm to **Add Items to EndNote** by selecting **Yes**.

8. Select **Done** to return to the EndNote app and your library.

  **Tip:** Follow these instructions for Web of Knowledge and Current Contents (via ISI).
Example 2. Proquest

1. Using the In-App Broswer, select P from the A-Z listing on the ANU Library homepage, and then select Proquest.
2. Perform your search.
3. On the search results page mark the required references for export by placing ticks in the boxes beside them.
4. From the Output to drop-down list, select Export/Save and then select EndNote, Citavi, or Reference Manager.
5. Choose the required content and select Continue.
6. Select Import to EndNote on the Download Options bar.
7. On the Add Items to EndNote pop-up box, confirm the addition of those records to your EndNote library by selecting Yes.
8. Your references will be added to My Library and to the Unfiled group.

Tip: Select the newly imported references to check that the information has been transferred correctly. If the selected records have not been imported select the downloaded file in Downloads and confirm to Add Items to EndNote by selecting Yes.

9. Select Done to return to the EndNote app and to your library.

Example 3. JSTOR

1. Using the In-App Broswer, select J from the A-Z listing on the ANU Library homepage, and then select JSTOR.
2. Perform your search.
3. On the search results page mark the required references for export by placing ticks in the boxes beside them. Select Export
4. From the Select a Format heading, select RIS file.
5. On the Download Options bar, select Import to EndNote.
6. On the Add Items to EndNote pop-up box, confirm the addition of those records to your EndNote library by selecting Yes.
7. Touch Done to return to the EndNote app and to your library.
8. Your records will be added to My Library and to the Unfiled group.

Tip: Select the newly imported references to check that the information has been transferred correctly. If the selected records have not been imported select the downloaded file in Downloads and confirm to Add Items to EndNote by selecting Yes.

9. Select Done to return to the EndNote app and to your library.
Manage references

Download and attach files

PDF and other documents can be downloaded from an online database or catalogue via the In-App Browser and attached to a reference in your library.

To download a document:

1. Open the PDF or other document.
2. Select **Download** on the Download Options bar. The file will appear in the **Downloads** list.

   **Tip:** Alternatively you can use the “Open In…” option from Mail or another app to add files to EndNote.

To attach the downloaded file to a reference in your library:

1. Select the required reference and scroll down to the **Attachments** field.
2. Select the [+] button.
3. In the **File Attachments** pop-up box, select the [+] button and then select **Add from Downloads**

   **Note** that files can also be added from your Dropbox file space.

4. Select the required file from the **Downloads** pop-up box. The file is added to the record.
5. When done, select the **Reference Editor** back button on the File Attachments pop-up box, and then the **Save** button on the Reference Editor dialog. The attached file is now visible as a thumbnail in the Attachments field at the bottom of the record.

   **Tip:** select the attached file to open and annotate it. If you need some help annotating a file, check out the Annotate PDF section within this guide.

Annotate PDF files

To annotate a PDF file:

1. Select the required reference in your library or group and scroll down to the **Attachments** field.
2. Select a file in the **Attachments** field to open it for viewing and to add annotations.
3. To add annotations to the PDF, select the **Annotations tool**.

   **Tip:** a pen, note, shape, and highlighter tool are available within the Annotations tool and the size, colour and opacity can be set for each.

4. When finished annotating, select the Library **back button** to return to the record.

   **Tip:** The annotated file can be sent by email. Annotations will be visible when opened with other PDF readers (e.g. Adobe).
Create groups

Groups make it easy to break a large library into subsets of references that already exist in an EndNote library.

A new library may display only the permanent All References, Unfiled, and Trash Groups, however you can create as many groups as you need. To create a group:

1. Select the Settings cog, then Manage My Groups.
2. Select Add a new group.
3. Enter a name for the new group and then select OK.
4. Select Settings and then Done

Add references to a group

To add a reference to a group, select and hold the required record and then drag the floating reference icon to the relevant group. To display the references within a group, select the group name in the Reference List pane.

For more information on Groups please refer to our EndNote How To guide at ql.anu.edu.au/20v9.
Synchronise with EndNote Online library

The EndNote for iPad app lets you synchronise references on your iPad with the EndNote library on your desktop computer or laptop via your EndNote Online account. You can create an EndNote Online account within the app, however we recommend creating your account via the EndNote desktop application as Advanced EndNote Online tools are only available when set up through the desktop application. For more information on EndNote Online refer to our EndNote How To guide at qll.anu.edu.au/3q99

Once you have created your EndNote Online account, you can synchronise references on your iPad with the EndNote library on your desktop computer or laptop by following the below steps:

1. Select the cog icon in the banner at the top of the page.
2. On the Settings pop-up window select Sign In
3. On the Account Sign In pop-up box, enter your sign in details and select Sign In
4. Select the Sync button. This will synchronise your iPad library, including attachments and custom groups, with your EndNote Online library

**Note:** Modifying or deleting synchronised references within your EndNote Online library will modify or delete them from your iPad library the next time you synchronise the libraries. Synchronisation happens automatically when you next use your EndNote iPad app.

**Synchronise attachments**

Attachments saved in your EndNote Online account are not automatically downloaded when synching with your iPad library.

1. To download an attachment, select the relevant reference in your iPad library and then select the Not yet downloaded icon in the Attachments field.
   Alternatively, mark a reference as a favourite by selecting the relevant reference in your iPad library and selecting the heart symbol.
2. Sync the iPad library again for the attachments to appear.
   When the synchronisation process has completed the attachments will appear in the Attachments field.

The attached PDF file is now ready for annotations as described above in Annotate PDF files.

**Workshops and help**

**EndNote workshops**

For upcoming EndNote workshops please refer to the ANU Library’s EndNote workshop page (qll.anu.edu.au/3o5c).

**Assistance**

Individual assistance is available from any EndNote trainer immediately following a workshop

- EndNote for iPad Getting Started Guide (by EndNote) at qll.anu.edu.au/j3j1
- EndNote website (noting FAQs, videos and a User Forum at the bottom of the page)
- Alternatively, you could join an EndNote Users Group on Facebook at qll.anu.edu.au/v7k6.

If, after attending a workshop, you need more help or if you’d like to schedule a workshop for your class or research group, email the Information Literacy Program at ilp@anu.edu.au

Please direct all other requests to AskANU IT Consultants in the Chifley Library.
Other resources

Training notes
To access the Information Literacy Program’s training notes, visit the Research & learn webpage (anulib.anu.edu.au/research-learn) and select the skill area followed by the relevant course. You can register for a workshop and find other information.

Research & learning how-to guides
Explore and learn with the ANU Library’s how-to guides.

- EndNote (ql.anu.edu.au/endnote)
- Data Management (ql.anu.edu.au/data)
- NVivo (ql.anu.edu.au/nvivo)
- Increasing your research impact (ql.anu.edu.au/impact)
- Finding books and more (ql.anu.edu.au/books)
- Finding journal articles and more (ql.anu.edu.au/articles)
- Finding theses (ql.anu.edu.au/theses)
- Using Google scholar from off-campus (ql.anu.edu.au/scholar)
- Find it at ANU (WebBridge) (ql.anu.edu.au/findit)
- Citations & abstracts (ql.anu.edu.au/citations)
- Topic analysis (ql.anu.edu.au/analysis)

Digital badges
Earn Digital Badges by completing the Library’s online courses (Search skills and strategies, EndNote: collect, curate, create and Increasing research impact). Self-enrol by logging in to Wattle (ql.anu.edu.au/badge).

Online learning
Online learning is available through ANU Pulse (ql.anu.edu.au/pulse), which can be accessed from both on and off campus by all ANU staff and students.

IT skills development modules
- Microsoft Office (Access, Excel, OneNote, Outlook, PowerPoint, Project, Visio, Word)
- Microsoft Office (Mac)
- Adobe suite (Illustrator, Photoshop)
- Other IT (Concepts of IT, FrontPage, Internet Explorer, Type IT, Windows)

Feedback!
Please provide feedback about today’s workshop via an online feedback form (ql.anu.edu.au/survey)