

EndNote Fast Start Class Outline

1 After the Class

1.1 The EndNote Quick Reference Card

The Quick Reference Card contains information on commonly used features, and can be found at <http://endnote.com/training/qrc/x7qrc-win.pdf> for Windows and http://wokinfo.com/media/pdf/enx6-mac_qrc.pdf for Macintosh.

1.2 Video Tutorials

We have videos available in several formats to help you learn the program.

- Our YouTube channel at www.youtube.com/endnotetraining has videos with closed captions. You will find links to videos specific to this class throughout this outline. Our channel also has recorded classes that can be played anytime.
- Downloadable videos at <http://endnote.com/training/training-video-downloads>
 - M4V files that will play in the free Quicktime Player program (<http://www.apple.com/quicktime/download/>) or iTunes program. These files have closed-captions in several languages, but the languages available for each vary by video. (Note: If you import these files into iTunes, they will display as various seasons of the TV show *EndNote*.)
 - MP4 files will play in Quicktime Player, iTunes, or various other video players.
 - WMV files will play in Windows Media Player.

1.3 Technical Support

Technical Support is free and is available Monday–Friday, 6 a.m. to 5 p.m., Pacific time. You can reach technical support through contact forms on our web site or by calling 1-800-336-4474, pressing 4 at the prompt, then selecting the *Research Software* option.

2 Online Connectivity—Importing References from Online Databases

2.1 Online Search—Searching an Online Database from within EndNote



Select **Online Search** mode from the buttons to the left of the style drop-down list. For EndNote X6.0 or earlier, this will be the third button, as shown here (Windows version shown here).



For EndNote X6.0.1 or later, this will be the second button, as shown here (Windows version shown here).

In the Groups panel on the left, select the online search file you want to use from the favorites list or click on **more...**, which will bring up a list of all installed online search files. Select the database you want to search from the list. (Notes: You can do a custom installation of EndNote to install more online search files or download them from our web site. Online search files are sometimes called “connection files” in EndNote.)

Using the Online Search mode, references from an online search are retrieved into a temporary EndNote library so you can preview them. After searching, references you wish to keep can be copied to a permanent EndNote library using the **Copy References to** command on the **References** menu or the **Copy to Local Library** button on the EndNote toolbar.

Related Video: [Online Search in Online Search Mode](#)

2.2 Direct Export

The exact method for using direct export will vary with the data provider you are using. A sample of the data providers that support direct export for at least some of their databases includes: Web of Knowledge (information on Web of Knowledge training options can be found at <http://science.thomsonreuters.com/training/wok/>), Oxford Press Journals, American Psychological Association, BioMedCentral, BMJ, EBSCOHost, EI Engineering Village, EMBASE, Los Alamos National Laboratory, IEEE, JAMA, ERIC (U.S. Dept. of Education version), Karger Publishing, JSTOR, MicroPatent, NERAC, NISC, OVID, PROQUEST, Elsevier, Science Direct Online, Google Scholar, and TIE.

Related Videos: [Direct Export from the Web of Science](#), [Direct Export from EBSCOhost Databases](#), [Direct Export Using Firefox](#), [Direct Export from PubMed](#)

2.3 Importing PDFs

EndNote can import PDF files containing a Digital Object Identifier (DOI) in the metadata or the first two pages of the PDF. EndNote sends the DOI to PubMed and CrossRef, online databases capable of looking up reference data by DOI. The online databases send back the bibliographic information, EndNote imports it, then attaches the PDF to the record created. This means the PDF must have a DOI and EndNote must have access to the Internet during the import.

- Select **Import** from the **File** menu.
 - Select **File** to import a single PDF, or **Folder** to import a folder containing PDFs.
 - Click the **Choose** button to select the file or folder to import.
 - **PDF** must be selected as the **Import Option**.
 - Click on the **Import** button to begin the import.
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3 Find Full Text and the EndNote Preferences (Optional)

3.1 Find Full Text Preferences

To edit the preferences, on Windows select **Preferences** from the **Edit** menu, on Macintosh select **Preferences** from the **EndNote** menu to the left of the **File** menu.

In the Find Full Text preferences, mark the box for **PubMed LinkOut** if you are in medicine or the biosciences and your organization is using PubMed LinkOut.

If your school or organization has an OpenURL server, enter that server's URL in the **OpenURL Path** field. You will need to consult with your library web site or librarian to learn what this URL is because every school or organization will have a different one.

If there is an authentication page that is used with your OpenURL server, enter it in the **Authenticate with URL** field. This will allow you to authenticate from within EndNote instead of having to open a browser window for authentication.

Please note that OpenURL is *not* a proxy server or VPN. It is an Internet protocol for managing digital subscriptions (your school may call it a "link resolver"), but in most cases you will still need to be IP-authenticated to access full text through OpenURL. This means you will need to be on-campus or connected to the campus through VPN with IP-authentication. Not all VPN includes IP-authentication, so check with your library or technical support department to find out if yours does.

3.2 Find Full Text

EndNote's Find Full Text feature will search the Internet, download, and attach full-text PDFs to selected references.

- Select (highlight) the references you want to find the PDF for.
- Select **Find Full Text** from the **References** menu, then **Find Full Text** again at the right.

OR

Click on the **Find Full Text** button  in the toolbar.

- Read the copyright notice and click the **OK** button to acknowledge the usage notice.

You can optimize this feature by setting preferences specific to your school or organization in the Find Full Text section of the preferences.

4 Finding Duplicates (Optional)

- Select the **All References** group to search the entire library for duplicates.
- Click on any reference in the list of references to make the list the active window in EndNote.

- Select **Find Duplicates** from the **References** menu. By default EndNote will compare the authors, year, title, and reference type to determine if a reference is a duplicate.

You will be presented with the first set of duplicates found, with fields that have differences highlighted. You can copy and paste between the two references shown, then select the version of the reference you want to keep. EndNote will then present the next set of duplicate references.

If you simply want to delete the newest references, click the **Cancel** button to close the comparison window. All the newer references will be highlighted. Select **Clear** from the **Edit** menu to send all highlighted references to the trash.

4.1 Groups (Shown in practice in earlier parts of the class, but here is a summary)

- Groups are organized under group sets, and references are organized in groups.
- You can have up to 5000 groups per library.
- You can have 5000 group sets per library. Group sets will appear in bold on Windows and in uppercase letters on Macintosh.
- The same reference can be in multiple groups.
- Combination groups are a special type of smart group based on a search strategy combining the contents of other custom or smart groups. Select **Groups > Create from Groups** to create a combination group.
 -  Custom groups have a folder icon. You manually add records to a custom group. To create a custom group, select **Create Group** from the **Groups** menu.
 -  Smart groups have a light bulb icon on Windows and a light icon on Macintosh, and records are updated automatically by matching the group's search criteria. To create a smart group, select **Create Smart Group** from the **Groups** menu.
 -  Combination groups have an overlapping circles icon and are created by combining other groups. To create a combination group, select **Create from Groups** from the **Groups** menu.

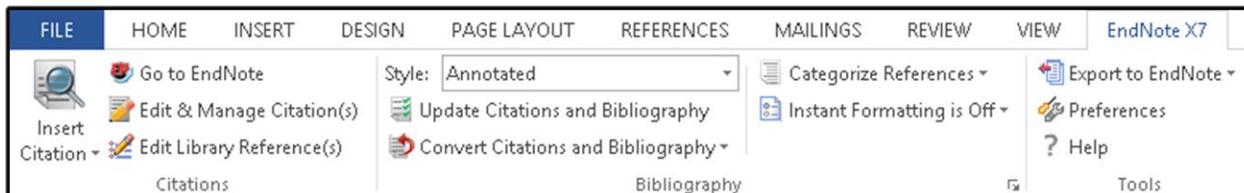
Related Video: [EndNote Groups](#)

5 Cite While You Write in Microsoft Word

5.1 Installing the Cite While You Write Tools for Word on Windows

When you install EndNote it will automatically install files into a common program folder, allowing EndNote and Word to communicate and enabling Cite While You Write (CWYW) in EndNote.

In Word 2007, 2010, or 2013 you will see a tab on the ribbon, similar to that shown here.



5.2 Installing the Cite While You Write Files on Macintosh

After you install EndNote (by dragging the EndNote folder to Applications), start the EndNote application. This will start the Customizer, which automatically installs Cite While You Write files for Microsoft Word (2011 or 2008). Upon starting Word, you should then see an EndNote menu under Word's Tools menu; you may also see an EndNote toolbar in Word. If you do not see the tools, select **Toolbars>EndNote** from the **View** menu in Word to make it visible.

The EndNote toolbar will appear in Word, as shown here.



5.3 Using the Cite While You Write Tools in Word

In the sections below the Windows button or drop-downs show first and the Mac button or drop-downs show second.

5.3.1 **Go to EndNote**

This command will take you to the EndNote program, where you can select (highlight) references for insertion into your Word document.

Related Video: [CWYW: Adding Citations to a Word Document](#)



5.3.2

Insert Citation



Find Citation(s)

This command will provide a search window where you can enter text that is in any field of the EndNote record you want to find. You can then select references from a list of those that contain your search terms and insert them into your paper. (Note: For Windows, click on the magnifying glass icon in the top part of the button to activate it.)

Related Video: [CWYW: Adding Citations to a Word Document](#)



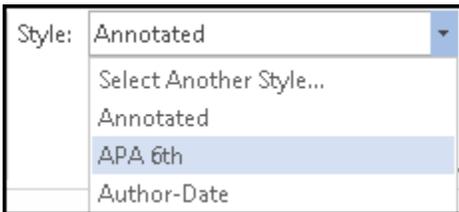
5.3.3

Insert Selected Citation(s)



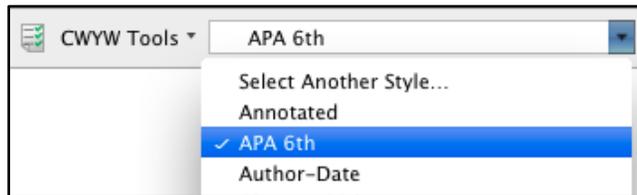
This command will insert the references that are selected (highlighted) in EndNote into your document at the location of the Word cursor. (Note: For Windows, click on the bottom part of the Insert Citation button to activate the list of commands available.)

Related Video: [CWYW: Adding Citations to a Word Document](#)



5.3.4

Style

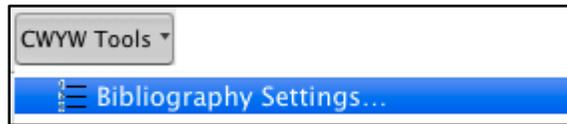


If you simply want to change the style, without changing any of the other options (such as font or line spacing), the Style drop-down list will allow you to do so.

5.3.5



Format Bibliography



Bibliography Settings

This command will allow you to change the EndNote style used for your document. It will also let you make other changes to the layout of your bibliography, such as adding titles and changing the line spacing.

Related Video: [CWYW: Formatting the Bibliography](#)

5.3.6



Edit & Manage Citation(s)

Use this command to make any changes inside a citation, such as adding page numbers or removing author names from author-date citations.

Related Video: [CWYW: Edit & Manage Citations](#)
