

## ENDNOTE QUICK START GUIDE

Millions of **researchers, scholarly writers, students, and librarians** use EndNote to search online bibliographic databases, organise their references and images, and create bibliographies and figure lists instantly. Instead of spending hours typing bibliographies, or using index cards to organise their references, they do it the easy way—by using EndNote! EndNote for Windows and Macintosh is a valuable all-in-one tool that integrates the following tasks into one program:

- Organise references and images in a personal library
- Construct your paper with built-in manuscript templates
- Find and download free full text articles on the internet
- Watch the bibliography and figure list appear as you write!
- Search bibliographic databases on the Internet

*"The most powerful citation manager you can find short of a personal librarian."*

-PC Magazine



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## Need more help?

### ONLINE INFORMATION

For the latest EndNote information, news and updates visit  
<http://endnote.adeptsience.com>

### SUPPORT

Self service software support for EndNote users in our online technical knowledge base – [www.adeptsience.com/kb/](http://www.adeptsience.com/kb/)

Discuss your technical issues and share knowledge with EndNote users around the world at <http://lists.adeptsience.com/endnote>

Watch and learn how to start using EndNote fast with our online demo movie at <http://www.endnote.com/training>

Find instant answers to the questions from EndNote customers that crop up regularly <http://www.adeptsience.com/go?pg=BA892>

### TRAINING

Want to get more out of EndNote and the best value out of your investment in the software? For further information regarding our EndNote training course content please visit: <http://training.adeptsience.com>.

### WEBSTORE

Need more copies of EndNote? Buy whatever you need online at [www.adeptstore.com](http://www.adeptstore.com) or call your local office.

**EndNote users on version X3 and above effectively get two tools for the price of one with free access to EndNote Web\*. This gives you the power to share reference folders with colleagues and collaborate on research projects regardless of location; research online and store references even if you don't have access to your own computer and create citations using your desktop or Web libraries in the same document.**

\*EndNote Web is only available as a standalone application to academic institutions. All institutions with an EndNote site licence or subscription to ISI Web of Knowledge have immediate access to EndNote Web.

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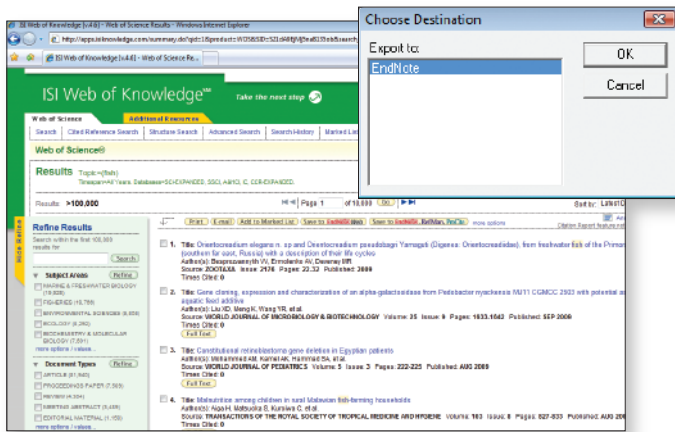
ENQG09/09

# Creating your EndNote Library

## How to get your references into EndNote

### 1 Exporting from an Online Database

1. Use your web browser to log onto the online database and perform your search.
2. Mark the references you want to send to EndNote.
3. Click on the **Save** or **Export** button.
4. EndNote will open and ask you to specify which library the references should be sent to.
5. Click **OK** and the references will be sent to your library.



Save to **EndNote@Web** Save to **EndNote@, RefMan, ProCite**

This functionality is available from the following online databases\*:

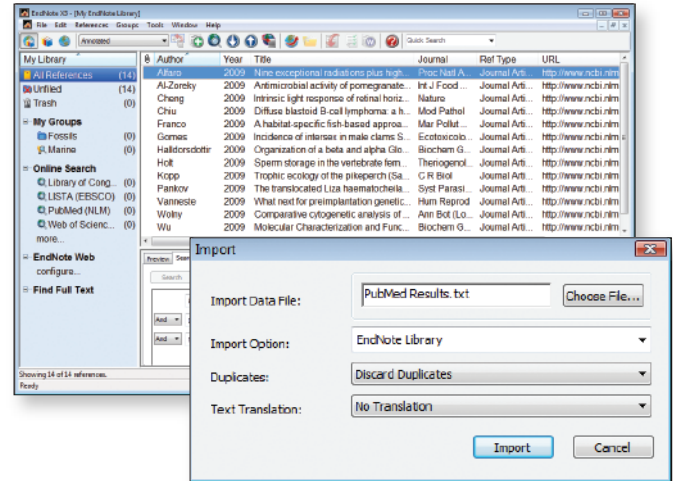
- ISI Web of Science; OCLC
- Ovid; ProQuest
- EBSOHost; Embase; ScienceDirect; PubMed
- **And many more!**



**TIP:** You should always check that the imported references contain all of the reference data.

\*N.B. Some databases require a subscription.

### 2 Importing References from Text Files



A large number of online databases allow you to save your search results to a text file.

1. Perform a search of the online database and mark the records you wish to send to EndNote.
2. Save the selected references to a text file and save the file to your desktop. If the database has more than one text file format you can check which one to use in the EndNote Filter Editor. Filters usually have the same name as the database used to obtain the references.
3. Launch EndNote and open your library.
4. Click on **File, Import** and select the text file you have created and specify the import filter you wish to use.
5. Click on **Import** and your references will appear in your EndNote library.



**TIP:** Click on **Other Filters** to view the complete list of 600+ filters which are available. If the filter you want is not listed you can download more filters from the web or create your own!

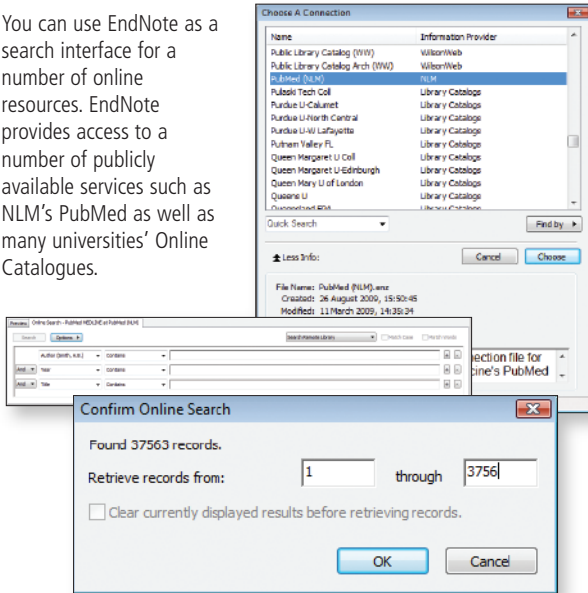


# Creating your EndNote Library

## How to get your references into EndNote

### 3 Connecting to Online Databases

You can use EndNote as a search interface for a number of online resources. EndNote provides access to a number of publicly available services such as NLM's PubMed as well as many universities' Online Catalogues.



1. Click on **Tools, Online Search** and choose from one of the 1700+ connection files available within EndNote.\*
2. Click on **Choose** then enter in your search criteria in the search pane at the bottom.
3. Click on **Search**.
4. Specify the number of references you want to download.
5. EndNote will display the references you have imported. You can double-click on any of the imported references to view the full record before you import into your EndNote library.



**TIP:** For complex searches you can use EndNote's 'Save Search' function so that you can load your search for use another time – ideal for keeping up to date with new publications!

\*N.B. Some databases require a subscription.

### 4 Manually Entering References

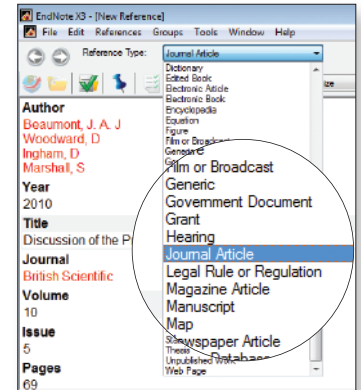
1. Click on **References, New Reference**. The new reference window will appear.
2. Select the type of reference you would like to enter e.g. Journal Article, Book Section etc.

The fields available will depend on the type of reference you have chosen.

3. Enter in the reference information and close the reference window to save your record. Authors, Keywords and Journals will appear in red if they are not already in your library.



**TIP:** EndNote will automatically suggest Author names, Journals and Keywords as you type them if they already exist in your library. You can also use Term Lists and the spell check function to ensure consistency and accuracy throughout your library.



#### To insert a figure

1. Click on **References, Figure, Attach Figure** and navigate to the image you wish to insert.
2. Click **OK** to add the image to your reference.

#### To insert a PDF or any other file

1. Click on **References, File Attachments, Attach File** and locate the file you wish to attach.
2. Click **Open** to add the file to your reference.

You can also drag and drop files onto your references to attach them.

# Managing your References

## Changing the Library Display Window

You can specify which columns are shown in the EndNote library window. Click on **Edit, Preferences** and select **'Display Fields'**. Select which columns you would like to see and click on **Apply**. If you select **Record Number** you can quickly see the most recent records you have added to your library. Macintosh users: click on **EndNote, Preferences** to change the displayed fields.

## Sorting References

You can quickly sort your references in ascending or descending alphabetical or numerical order by clicking on any column heading in the library window.



**TIP:** For more advanced sort options click on **Tools, Sort Library**.

## Checking for Duplicates

Click on **References, Find Duplicates**. Any duplicate references will be shown side-by-side so you can easily see which is the reference to keep.

Clicking **Edit, Preferences, Duplicates** allows you to decide which fields EndNote looks at and is also where you can adjust settings for spacing and punctuation.



**TIP:** The newest references will appear with higher **Record Numbers** than those which have been in your library for longer. Newer references will be less likely to appear in your papers than older references.

## Globally Editing References

To add the same information to a large number of references (e.g. keyword or reference source) click on **Tools, Change and Move Fields**.

Enter the text to be added and specify which field this should be placed in. You can add the date that you added the reference into your library or the search criteria you used to locate the reference in an online database.

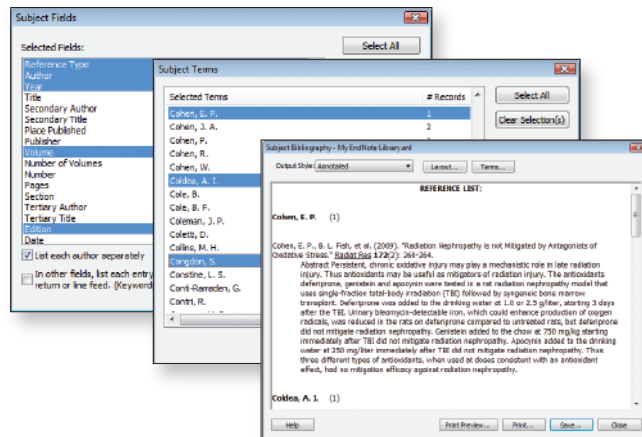


**TIP:** EndNote will only change the displayed references. Use the **Show and Hide Selected References** option in the **References** menu to display selected references.

## Creating a Subject Bibliography

You can create a bibliography containing references which have the same keyword, author or any other information in your library – ideal for creating a reading list.

1. Click on **Tools, Subject Bibliography**.
2. Select which fields you want to group your references by e.g. Author.
3. Click on **OK** and a list of all the different terms will be displayed along with the number of references associated with each term.
4. Highlight one or more terms and click **OK** to display the references in any one of EndNote's 3,700+ styles.



**TIP:** Click on **Layout** to change the appearance of the bibliography.

## Searching your Library

You can quickly locate any reference in your library using the search function.

Click on **Tools, Search Library** and enter your criteria and the fields you wish to search in the search pane at the bottom.



**TIP:** Use the **'Is greater than'** and **'Is less than'** options to locate references in a particular date range. You can also save searches for use at a later point.



# Managing your References

continued...

## Grouping References

EndNote allows you to create groups of references within your library and even create sub-groups, so you can always be organised.

### To create a group

1. Right-click in the Groups pane on the left hand side of the screen and select the option to **Create New Group**.
2. Give the new group a name and press enter.

### To add reference to a group

1. Highlight the references you wish to add.
2. Drag them onto the Group name on the left.
3. To view the references in any group click on the group name.

### To create a Group Set

1. Right-click in the Groups pane on the left hand side of the screen and select the option **Create Group Set**
2. Type a name and press enter.
3. To create sub-groups, right-click on the Group Set name and select **Create Group**.

## Smart groups

Automatically create subsets of references based on your criteria.

To create a Smart Group:

1. Click **Groups** then **Create Smart Group**.
2. Enter the search criteria to be saved.

Your Smart Group will be automatically updated as your library changes.



**TIP:** A reference can be added to more than one group but will only ever appear once in your library.

## Find Full Text

EndNote can now find free full text articles automatically.

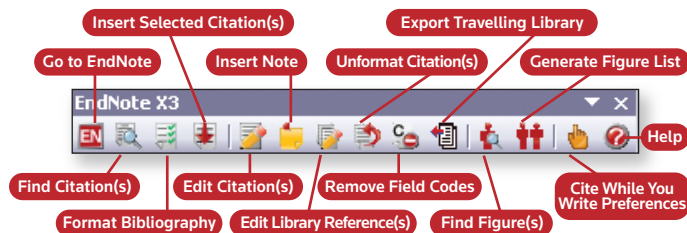
1. Select references, groups or even your entire library.
2. Click **References, Find Full Text** and EndNote downloads any corresponding files that it finds and links them to the appropriate reference.

# Creating your References and Bibliography

## Cite While You Write™ in Microsoft Word

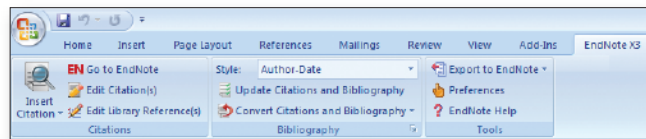
Create a paper with properly formatted citations and bibliography using the EndNote toolbar in Microsoft Word.

1. Launch Microsoft Word and create a new document.
2. Click on **Tools, EndNote X3** and select **Find Citation(s)**.
3. Enter your search text into the **Find** box e.g. the surname of the author or the year. All references meeting your criteria will be shown.
4. Highlight the reference you want to insert and click **Insert**.
5. EndNote will place the reference(s) into your Word document and instantly format them in your chosen bibliographic style e.g. Harvard.



## Using Word 2007?

The new Microsoft Word 2007 ribbon technology provides users with intuitive access to EndNotes Cite While You Write™ commands so the look and feel stays the same.



**TIP:** You can simply type the citations in the text, enclosed in the curly brackets and EndNote will insert and format it automatically.

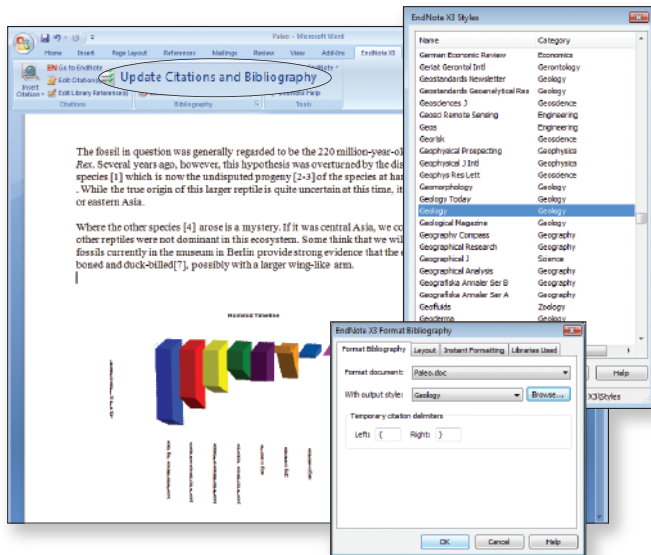


# Creating your References and Bibliography

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## Changing the Bibliographic Style

1. Click on **Tools, EndNote X3** and select **Format Bibliography**.
2. Click on the three dots to browse to select any of the 3,700+ styles provided with EndNote.
3. Click **OK** to select the style and then click **OK** to format your paper. Your in-text citations and bibliography will all be changed to reflect the new output style you have chosen.



## Creating a Figure List in Microsoft Word

Click on **Tools, EndNote X3** and select **Find Figure(s)**.

1. Enter some text to locate the reference containing the image.
2. Highlight the image you wish to insert and click on **Insert**.
3. EndNote will add the image caption beneath the image and a reference to the figure within your text.



**TIP:** Use Microsoft Word's 'Index and Tables' function to create a list of all of your figures along with the corresponding page number in your document.

## Using EndNote with other Word Processors

### Cite While You Write™ in OpenOffice for Windows

OpenOffice now integrates with EndNote in the same way as Microsoft Word. From the **EndNote X3** toolbar or menu you can search, insert, format and edit citations.

### Cite While You Write™ on Macintosh

EndNote X3 works with Microsoft Word 2008, Word 2004 and Apple Pages '09.

### Apple Pages '09

To insert a citation in Pages '09 click **Insert, EndNote Citation**.

Your bibliography will automatically be created/updated.

To edit a citation you've already inserted, simply right-click and select **Edit Citation**.

### Format Paper

The **Format Paper** function allows you to utilise other word processors, such as Microsoft Works, Corel, Word Pad, etc.

1. Highlight the reference(s) you want to use in EndNote and select **Edit, Copy**.
2. You can now select **Paste** in your word processor to insert the citation.
3. When you have finished writing your paper, save it as a Rich Text Format (\*.RTF) file.
4. In EndNote, select **Tools, Format Paper, Format Paper** and select the RTF file you have created.
5. Select the output style you wish to use and click on **Format**.

EndNote will create a new document which will contain all of your formatted references in the style you have chosen. EndNote will suggest a new name for the file.

6. Click on **Save**. You can now open up the new file in your word processor which will contain citations and a full bibliography formatted in your chosen style.