

# EndNote Fast Start Class Outline

## 1 Importing References

### 1.1 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. This will be the third button in EndNote X6.0 or earlier, as shown here, or the second button in X6.0.1 or later (Windows version shown here).

In the Groups pane 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](#)

### 1.2 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, Stanford University’s Highwire Press, 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.

This link provides Direct Export instructions for common data providers:  
[http://endnote.com/endnote\\_export.asp](http://endnote.com/endnote_export.asp)

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

---

---

---

---

## 1.3 Importing PDFs

EndNote can import PDF files containing a Digital Object Identifier (DOI) in the metadata or the first two pages of the PDF. It 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.
- 
- 
- 

## 2 Find Full Text and the EndNote Preferences

### 2.1 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.

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

- You can have up to 5000 groups per library.
- You can have 5000 group sets per library.
- 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.
  -  Smart groups have a light bulb icon and records are updated automatically by matching the group’s search criteria.
  -  Combination groups have a Venn diagram icon and are created by combining other groups.

Related Video: [EndNote Groups](#)

---

---

---

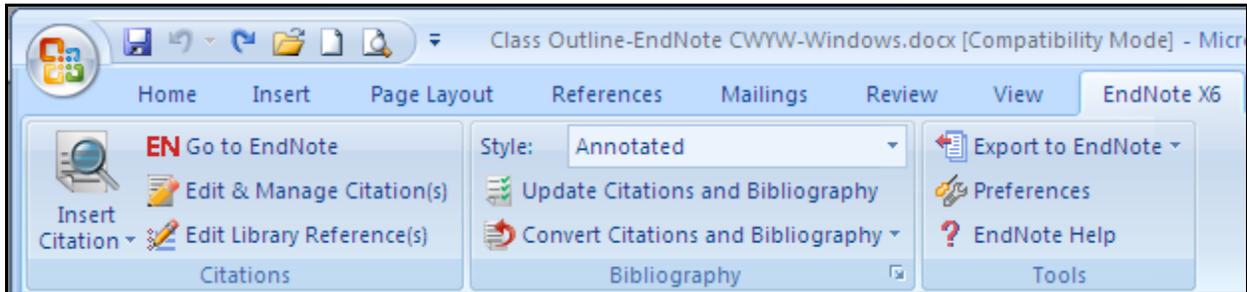
---

## **4 Cite While You Write in Microsoft Word for Windows**

### **4.1 Installing the Cite While You Write Tools**

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 or 2010, you will see a tab on the ribbon, as shown here.

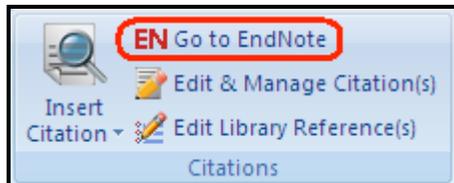


In Word 2003, you will see a toolbar, as shown here. If you do not see the tools, select **Toolbars>EndNote** from the **View** menu in Word to make it visible.



---

## 4.2 Using the Cite While You Write Tools



### 4.2.1

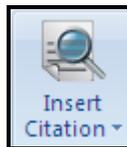


### ***Go to EndNote***

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](#)

---



### 4.2.2

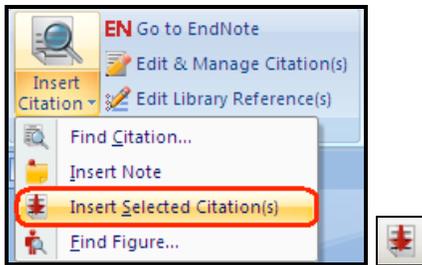


### ***Find Citation(s)***

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.

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

---



**4.2.3** *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.

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

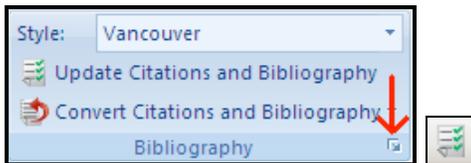
---



---



---



**4.2.4** *Format Bibliography*

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](#)

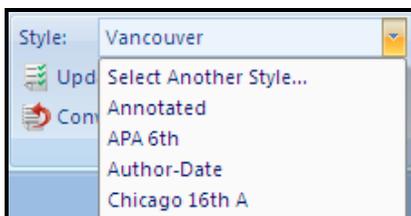
---



---



---



**4.2.5** *Style (Only Available in Word 2007/2010)*

If you simply want to change the style, without changing any of the other options available in the Format Bibliography command, the Style drop-down list will allow you to do so. \_\_\_\_\_

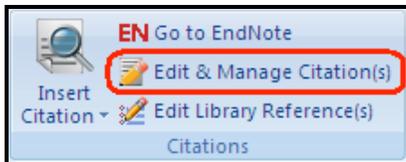
---



---



---



### **Edit & Manage Citation(s)**

#### **4.2.6**

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](#)

---

---

---

---

## **5 Cite While You Write in Microsoft Word for Macintosh**

### **5.1 Installing the Cite While You Write Tools**

After you install EndNote, 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 toolbar, select **Toolbars>EndNote** from the **View** menu in Word to make it visible.

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



---

---

---

### **5.2 Using the Cite While You Write Tools**

#### **5.2.1 Go to EndNote**

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

---

---

---

**5.2.2**  **Find Citation(s)**

This command will provide a search window where you can enter text that is in any field. You can then select references from a list of those that contain your search terms and insert them into your paper. \_\_\_\_\_

---

---

---

**5.2.3**  **Insert Selected Citation(s)**

This command will insert the references you selected in EndNote into your document at the location of the Word cursor. \_\_\_\_\_

---

---

---

**5.2.4**  **Edit 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. \_\_\_\_\_

---

---

---

---

**5.2.5**  **CWYW Tools:**  **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. \_\_\_\_\_

---

---

---

---

## **6 Useful Links**

### **6.1 Where to Purchase EndNote**

- Your university bookstore or computer store.
- Through our web site at <http://endnote.com>.
- Many national and international resellers.

### **6.2 EndNote Training Schedules and To Register for Public Online Classes**

- <http://endnote.com/training/calendar>.

### **6.3 EndNote Training Videos**

- Streaming with closed captions in multiple languages at [www.youtube.com/endnotetraining](http://www.youtube.com/endnotetraining).
- Contact your trainer if you need downloadable versions of the videos.