After completing this workshop, you will be able to:

1. Create an EndNote Library
2. Access an EndNote Web account
3. Add and manage references
   a. Manually
   b. Import from a database
   c. From a PDF
4. Find full-text in EndNote
5. Create groups
6. Use EndNote with Microsoft Word
7. Sync and share references
**EndNote X7: The Basics**

**Endnote Toolbar**
The buttons on the EndNote toolbar provide you with quick control of your library.

- **Local Library Mode**
  This is the default mode. View and access all your saved references and groups or use tools like quick search to search only your existing EndNote library.

- **Online Search Mode**
  This lets you search online databases, right from within EndNote. References are downloaded into a temporary library so you can pick and choose which ones you want to save to your EndNote library.

- **Integrated Library & Online Search Mode**
  This gives you access to all the groups and commands available in both Local Library mode and Online Search mode. When downloading references from an online database, EndNote will save them to the Online Search group set as well as your local library.

**Bibliographic Output Styles menu**
Easily access the styles you use most through a dropdown right on your toolbar.

- **Copy to Local Library**
  After searching online, select which references you want to move to your EndNote library and copy them to your local library, leaving behind the ones you don’t need.

- **New Reference**
  Quickly enter a new reference.

- **Online Search**
  Select the database you want to search. *Hint: This will automatically switch you to Online Search Mode.*

**Quick Search Text Box**
There are lots of ways to search your library. Quick search is good for simple searches of your references, groups, PDF notes and annotations. For more complex searches, use our Advanced Search.

**Import**
Import references you have saved to your computer.

**Export**
Export your library.

**Find Full Text**
Select a reference or group of references, and use this feature to search your subscriptions and full-text freely available online for the article(s). Any available PDFs will be automatically attached to the reference.

**Open Link**
Without opening the reference, you can quickly open the links attached to it.

**Open File**
Without opening the reference, you can quickly open the attachments.

**Insert Citation, Format Bibliography, and Return to Word Processor**
When Microsoft Word or OpenOffice.org Writer is open these commands let you toggle back and forth easily between your word processor and EndNote.

**Sync**
You can set your library to automatically sync, or use this button to sync when you choose. Then access your library across multiple desktops where EndNote is installed, online and even on your iPad.
1. Creating an EndNote Library

When you open the EndNote program, you will see the following display.

1. Click the button to **Create a new library**.
2. Give your new library a name.

Your new library should look like this:
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2.1 Register for EndNote Online
EndNote Web untethers your EndNote library from your desktop. With IUPUI’s account you can sync an unlimited number of references and groups and unlimited file attachments to an online, cloud server. With EndNote Web, you can use EndNote on any computer, whether or not it has EndNote installed. Further, you can sync your references between your computer(s), and you can easily collaborate and share groups of reference with colleagues.

Register for an EndNote Web Account
2. Select create an account.

3. Use your IU or IUPUI email address. Then select Continue.
Note: EndNote will only recognize you as an authorized user by your campus email address. Using a different email address in the step will prompt a request for payment.

4. Enter personal information and create a password.
5. Agree to terms and conditions.

Once you have created an EndNote Online account, you are able to sync your EndNote library between desktops, the cloud, and the EndNote iPad app.

### 2.2 EndNote Sync

To sync your EndNote desktop and online library references, click the **Sync** button to sync for the first time. (Note that you may be asked if you want to create a compressed library as a backup if it is the first time the library has been synced on that computer.)

Sync button for Windows:  
Sync button for Macintosh:  

Use your account’s logon information, as in the example shown below. Click the **OK** button to start the sync.

During the first sync, all references in both the EndNote desktop and online libraries will be copied to the other library, as well as all group information, but only custom groups will be displayed in EndNote online. So there may be duplicates and some library cleanup necessary. After the first sync, any
change made in any synchronized library will be reflected in all synchronized copies of the library. This means if you delete references in EndNote online or EndNote on the desktop, those references will be deleted in both.

Although it is possible to create an EndNote online account and not synchronize it to an EndNote desktop library, syncing will allow you to easily keep the same set of references in both libraries.

After syncing an EndNote library, you can begin sharing groups to collaborate with others.
3.1 Adding References to a Library: Manual

There are no references in a brand new library, to add one, click on the New Reference icon: You can also add a reference by going to References → New Reference or using Ctrl+N. The default reference type is a Journal Article. Use your mouse or the tab key to move between fields to enter information. Click on the box with the X within the reference to close it and enter another. EndNote will ask if you want to save the changes you’ve just made.

- Author names can be entered either “First Middle Last” or “Last, First Middle”
- Use a carriage return/hit ‘Enter’ if entering multiple authors

When you save and close your record, you will see it displayed in your library.

3.2 Adding References to a Library: Importing Records from a Database

While EndNote offers the ability to enter records manually, a more efficient means of adding items to your library is to import records directly from a database. Most databases support direct export.

Example One: EBSCO

In this example, perform a search in an EBSCOHost Database (such as Academic Search Premier). Click on a record to get to a screen like the one below. Under “Tools” select “Export.”
From the screen below, simply click “Save.” You should be taken back to EndNote.

Depending on your web browser, you may open the file with EndNote in a variety of ways. After you’ve done so, however, the references will appear in your EndNote Library.

**Example Two: Google Scholar**

To allow direct export from Google Scholar to EndNote, you need to set up your Google Scholar Preferences:

- In Google Scholar [http://scholar.google.com/](http://scholar.google.com/), click on Scholar Preferences
- Scroll down to Bibliography Manager and select “Show links to import citations into.”
- From the dropdown menu, select EndNote
- Click Save Preferences.

From now on, your Google Scholar search results will include an “Import into EndNote” option:
Example Three: Pubmed

In PubMed, mark an item you want to put in your library and click the Choose Destination and select Citation Manager by clicking the radio button. If you do not select any items, PubMed will attempt to send you all of the retrieved results up to 200.

If prompted, select EndNote as the file destination.

Then EndNote receives the file of imported references.
3.3. Adding a reference from a PDF
EndNote can create a full reference from an article PDF, if the PDF has a Digital Object Identifier (DOI) number displayed on one of the first few pages. If EndNote can read this number, it will download the citation information from global DOI database and create a new reference. You can import a single PDF or a folder of PDFs into EndNote.

Go to FILE ➔ Import ➔ File

Choose the file or folder you would like to import. Then change the Import Option to PDF.

If EndNote is successful, the new reference(s) will appear. If not, EndNote will create a blank reference with the PDF attached.
4. Finding Full Text

Once you filled your library with references, you will likely want to review the articles again. EndNote’s Find Full Text feature enables your EndNote library search online for a full text version of references. Further, EndNote’s Open Link feature provides swift access to the original source of the record. For example, records exported from EBSCOhost return you to their database record and their options to full text access. This feature will not work for those records created manually.

To take full advantage of this feature, first you should add the IUPUI Open URL Link to your EndNote Library. Select EDIT → PREFERENCES. After the Preferences window opens, select FIND FULL TEXT. Select the box for PudMed LinkOut. Enter http://ulib.iupui.edu/findit/openurl in the OpenURL Path box. Enter http://ulib.iupui.edu/cgi-bin/proxy.pl?url= in the Authenticate with URL box.

To find the full-text of an entry, select the reference; then select the Find Full-Text icon.

EndNote will attempt to download the full-text version of the reference. If it is successful a paper clip icon will appear in the reference list.
5. Creating Groups in EndNote
To organize references in your library, you can create groups for topics, projects, courses, and more. Go to Groups → Create Group.

Under “Groups” a box will appear for you to name your new group.

To add references to a group, you drag and drop references from All References. Alternatively, you can select a reference: right-click, select Add References To, and select the name of the desired group.
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6. Using EndNote “Cite While You Write” with Microsoft Word
When EndNote is installed on your computer, it should automatically install a separate EndNote tab into Microsoft Word. Before we begin, verify that these tools are available.

![EndNote tab in Microsoft Word]

**Inserting Citations in a Document**
Move your cursor to the point in your document where you would like to insert a citation. You can search EndNote for a specific citation while inside Word (2010) by clicking the “Insert Citation” icon.

A search box will open. Insert a search term (i.e. name of author, or a word in the title) and click Search. When you have located the desired reference, click on the reference to highlight, then click the Insert button.

![EndNote citation search]

EndNote will then insert a citation and a references entry into your Word document in the following way:

```
This is my sample sentence (Avelino, Silva, & Mioso, 2012).
```
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EndNote creates an in-text citation and starts a bibliography. The EndNote-created citations appear gray when you move the cursor there to illustrate that EndNote is controlling this portion of the document. The citations are linked to your EndNote library and you should **NOT** edit your citation within Word. If you have ever created a Merge file, it works in a similar way. **TIP:** To you might consider inserting a Page Break between your writing and the EndNote running bibliography.

Changing Bibliography Format in Word

To change your bibliography’s format, select the Style drop down box.

![Image of EndNote interface showing APA 6th style selected]

Editing Citations within Word

If you would like to edit the appearance of the citation inserted into Word, (i.e. to add page numbers), Select **Edit & Manage Citations**.

![Image of EndNote interface showing Edit & Manage Citation(s) highlighted]

The following box will appear and allow you to alter certain attributes of your citation:
When you’ve made the necessary changes, such as adding page numbers or checking the box to exclude author, click on the OK button.

**To send your document to another person:**
You may want to send an electronic copy of your paper to someone. Sending it with the EndNote functions enabled sends a **Traveling EndNote Library** embedded in the document, which the receiver may open and access the EndNote references contained within the document.

However, to send a document without EndNote formatting SAVE your linked document first. Then from the Endnote tab in Word select the **Convert Citations and Bibliography** dropdown, and select **Convert to Plain Text**.

**Exporting the Traveling Library**
Data in a traveling library can be extracted and put in your own EndNote library.
On the Cite While You Write tab in Word for Windows, click **Export to EndNote** in the **Tools** group, then select **Export Traveling Library** from the drop-down list. On Macintosh, select **Export Traveling Library** from the **Tools** drop-down list on the floating EndNote toolbar.
Select the EndNote library to import the references to, or create a new library. EndNote will filter out duplicate references that came from the library you select.

7. Sharing Your EndNote Library

Full Library Sharing

New to EndNote! Users of EndNote X7.2 or later can share their entire library, with simultaneous read-write access to all references and attachments, with up to fourteen other EndNote X7.2 (or later) users. Some requirements and information for sharing are—

• All users must be using EndNote X7.2 or later.
• All users must sync their EndNote desktop and online libraries. The sharing process works through EndNote Sync.
• Although a library owner can only share with up to fourteen other EndNote users, an unlimited number of libraries can be shared with a sharee. For example, if an administrative assistant worked with 30 faculty members, all 30 faculty members would be able to share their full libraries with the administrative assistant.
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7.2. How to Share a Library
If you have not already synced your EndNote desktop and online libraries, click the Sync button to sync for the first time. (Note that you may be asked if you want to create a compressed library as a backup if it is the first time the library has been synced on that computer. We strongly suggest making a backup before the first sync.)

Sync button for Windows:  
Sync button for Macintosh:  

In your synced library, click the Share Library button.

Enter the email address of the person you want to invite to the shared library, then click the Invite button. The email address does not need to be the one the invitee/sharee uses for their EndNote online account. (Note: excess space has been removed from the image to better fit on page.)

The invitee’s name will be added to the list at the top of the dialog with a Pending status to show they have not yet accepted the invitation. If you want to send a reminder of the invitation or remove them from the list, you can do that at any time.

The invitee will receive an email similar to the one shown below, inviting them to the shared library.
They must click the **Accept** button to accept the invitation.

The invitee will be directed to logon to the EndNote online account they sync through.

The invitee will receive a notification that they are ready to access the shared library. There will be additional information on this page. Remember they must be using EndNote X7.2 or later in order to access the shared library.

To open a library that has been shared with you in EndNote, select **File--Open Shared Library**.
**EndNote X7: The Basics**

You will see a list of all the libraries that have been shared with you. Remember that although you can only share one library with up to fourteen other people, an unlimited number of libraries can be shared with you. Select the shared library you want to open and click the **Open** button.

![Select a Shared Library](image)

The library will open, looking much like any other EndNote library. Note, however, that the name of the library will show the EndNote online account name of the owner and the **Share Library** button will be unavailable. You cannot share a library that you do not own with others; only the owner of a library can share it.

![EndNote X7 Library](image)

The next time the owner of the library looks at the list of people she has shared the library with, she will see you named as a Member of the group sharing the library instead of as Pending.

![Sharing Groups](image)

**7b. Sharing Groups From Your EndNote Library**

If you do not want to share attachments, need to share references with people using older versions of EndNote or EndNote basic, need to control other users’ access rights, or need to share with more than fourteen others, you can share groups through EndNote online.

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With this method of sharing references, the owner of the references puts them in a shared EndNote online group. The owner of the references controls access to them, so one user could be given read-write access while another could be limited to read-only access. This method allows a large number of users to be given access to the same set of references for collaborative work.

To share a group, go to the Organize tab. Select Manage Sharing:

![Manage My Groups](image)

To share the group of references select **Start sharing this group**.

![Add E-mail Addresses to 'AI: Corvids'](image)

A window will open. Enter the email address the EndNote Web account users use to access EndNote Web.

The user you shared your group with will see your group show up under a Groups Shared by Others heading in their EndNote online library.