

# Introduction to EndNote

**Digital Media Commons**  
**Fondren Basement B42**

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**713-348-3635**

# EndNote Workshop Handout

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*This handout was developed on Windows with EndNote X7.3.*

## Outline

- I. Workshop Objectives
- II. Introduction
- III. Collecting references
- IV. Organizing references
- V. Writing with EndNote
- VI. Syncing your local library with EndNote Web
- VII. Sharing your references

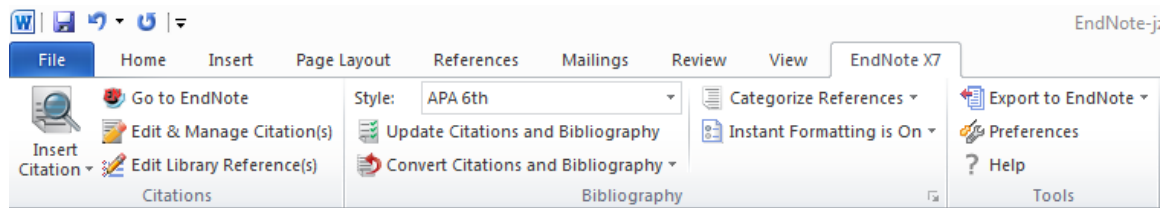
## I. Objectives

Participants will be able to:

- Understand basic features of EndNote
- Collect citations from Fondren catalog, journal articles, and databases.
- Retrieve metadata for PDF files
- Organize your EndNote collections
- Add citations and a bibliography to a word document using the EndNote Cite While You Write Word Plug-in
- Sync your EndNote library on all of the computers you use to EndNote web
- Share references with your colleagues

## II. Introduction

- EndNote is a citation management program developed by Thomson Reuters in 1988. It is available for both Windows and Macintosh platforms. The price information can be found at <http://endnote.com/buy>. The current EndNote version is X7.5.
- Before you install EndNote on your computer, make sure Word is quit and not running. When you install EndNote, Cite While You Write(CWYW), the word plug-in for EndNote, will also be installed. Below is a screen shot image showing what CWYW tool bar looks like after a proper installation.





#### Features:

- Imports references from library catalogs and online databases as you search.
- Creates a personal research library and organizes references and PDFs.
- Inserts citations and format bibliographies instantly while you write.
- Shares references with colleagues.


### III. Collecting References

Local Library Mode : displays local library (doesn't display online search results).

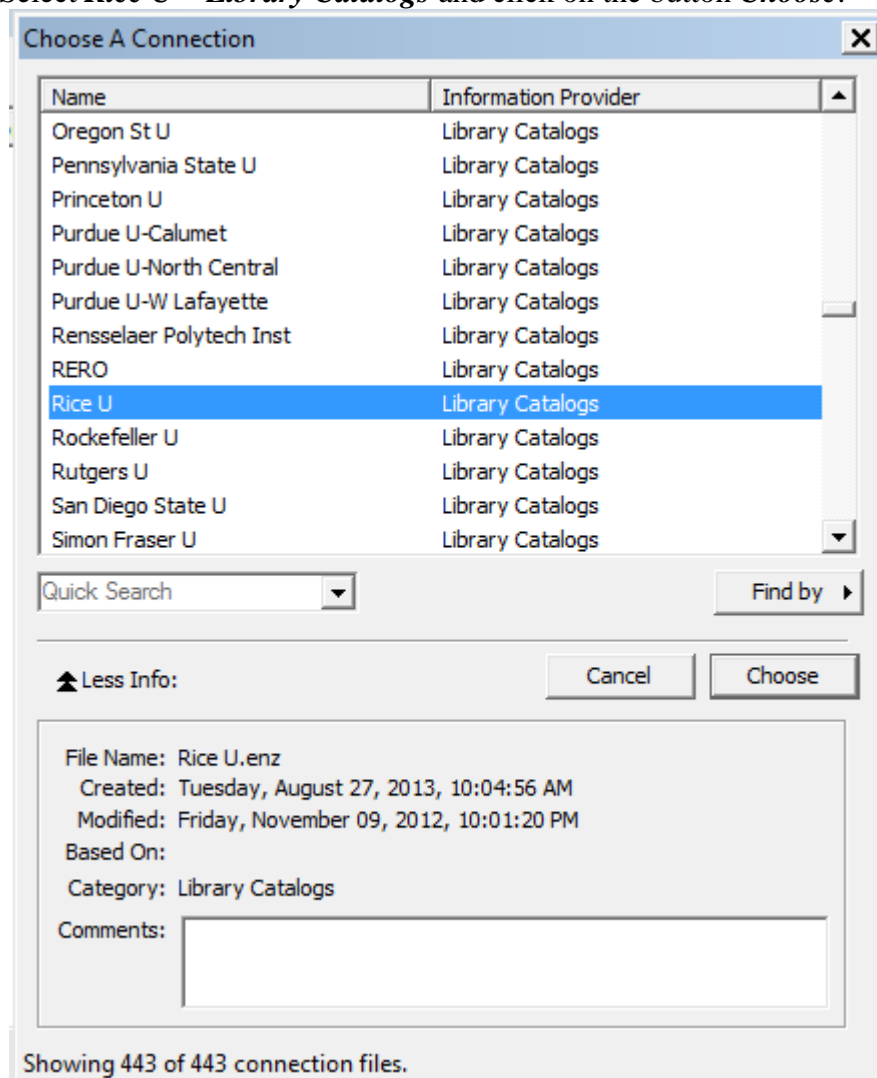
Online Search Mode : displays only online search results. Records retrieved from online searches are not automatically placed in the local library.

Integrated library and online search mode : records from online search results are automatically placed in the local library under "unfiled". We recommend you not to use this mode since it may unexpectedly spam your local library, adding too many items that you don't intentionally want to have for your local library.

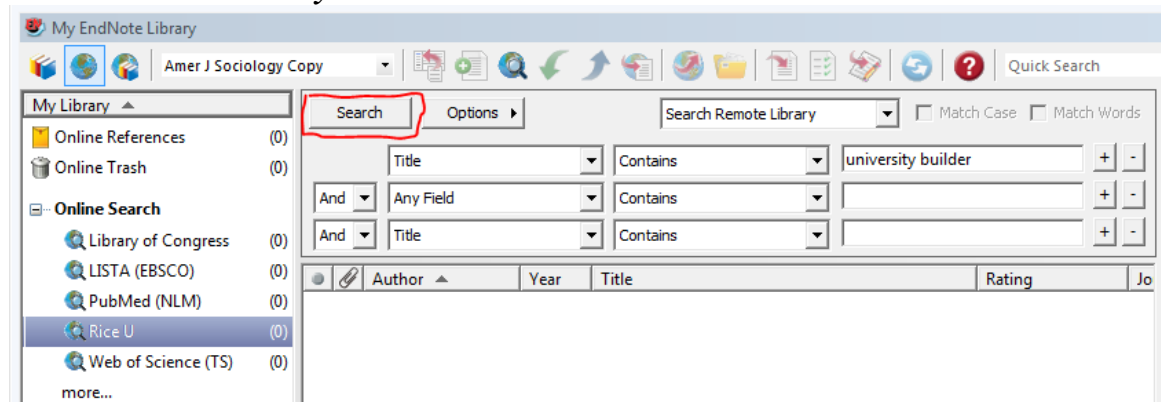
#### **ACTIVITY 1:** Adding references from Fondren catalog within EndNote

1. Open up EndNote.
2. Click the **Online Search Mode** (Temporary Library) icon .
3. Click on **More** under **Online Search** in the My Library column on the left.
4. A dialogue box will open.

5. Select **Rice U – Library Catalogs** and click on the button **Choose**.

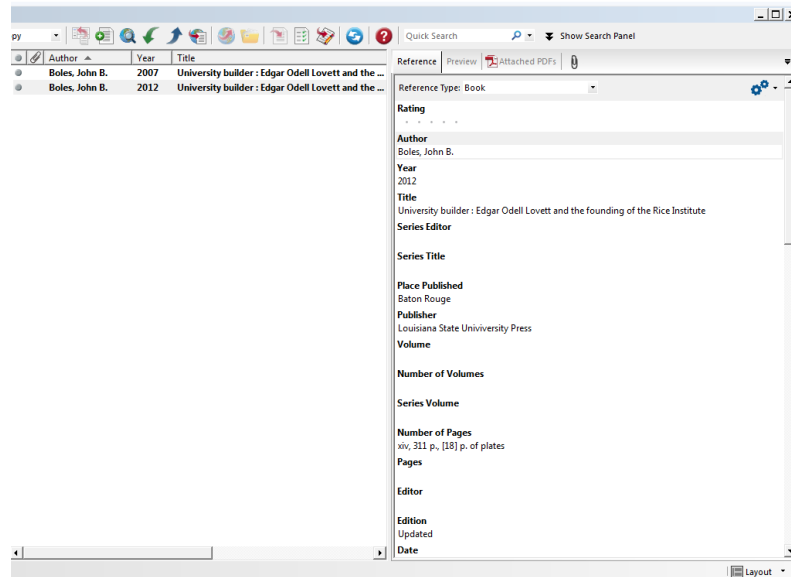


6. The **Rice U catalogues** will now appear under **Online Search** in the My Library column.
7. Select **Rice U**, choose **Title** from the first line of the search box, and type your search terms "**University builder**" into the search box. Click **Search**.



Then on the **Confirm Online Search** pop-up window, click **OK** button to retrieve records.

8. Select an item and inspect the captured reference data in the right pane.



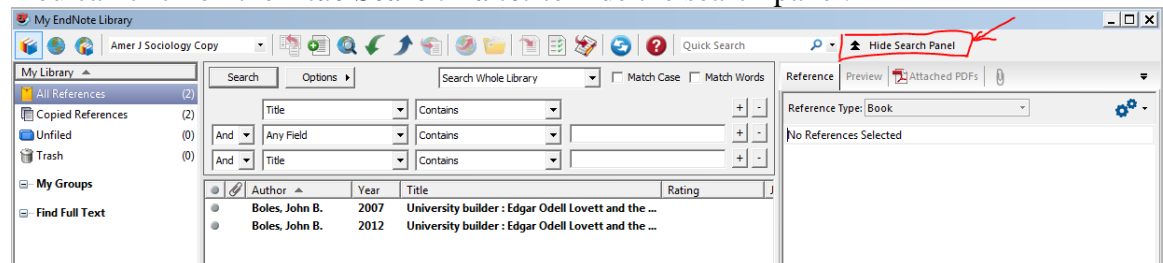
9. All the online search results will be temporarily stored in “*The Online References*”. The items in this group will not be saved when EndNote is closed.
10. Select the references you wish to transfer to your EndNote library, then click on



**Copy to Local Library**. This will place the records into your local library.

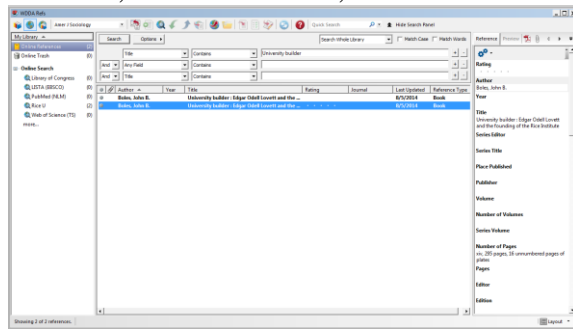


11. Click on the Local Library icon.
12. You can click on the **Hide Search Panel** to hide the search panel.



13. If you find the record captured misses some important information, you might want to use a different major source. In this case, Fondren catalog recently did an upgrade to its interface in Spring 2015, while EndNote can't keep up with it. So

the Year, Place Published, and Publisher are all missing.



14. WorldCat is a good alternative. Add WorldCat to Online Search list. Repeat the above steps with WorldCat, and save the book record of “University Builder” by John Boles.

**ACTIVITY 2:** Adding references from Google Books within Google Chrome, IE, or FireFox.

1. Go to the Google books website (<http://books.google.com/> ).
2. Type in “*university builder, John Boles*” in the search box and click on **Search Books**.
3. Click on the first item on the search result page.
4. Click on **About this book** on the left column.
5. Scroll down to the bottom of the page, click on EndNote under Export Citation.

#### Bibliographic information

Title University Builder: Edgar Odell Lovett and the Founding of the Rice Institute  
 Author [John B. Boles](#)  
 Edition illustrated  
 Publisher LSU Press, 2012  
 ISBN 0807135224, 9780807135228  
 Length 344 pages  
 Subjects [History](#) > [United States](#) > [State & Local](#) > [General](#)

[Biography & Autobiography / General](#)  
[Education / Administration / Higher](#)  
[Education / General](#)  
[Education / Higher](#)  
[History / United States / 20th Century](#)  
[History / United States / State & Local / General](#)

Export Citation

BiBTeX

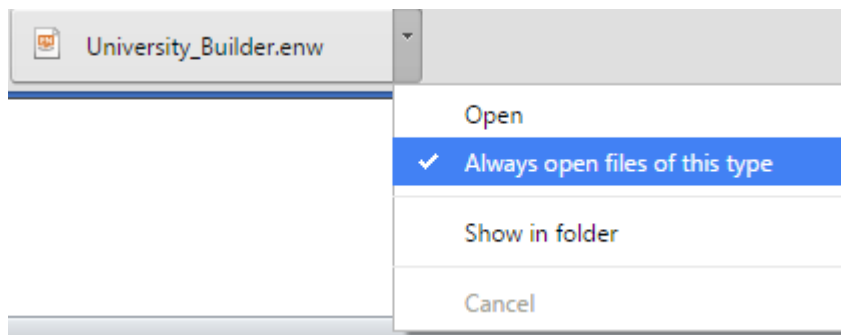
EndNote

RefMan

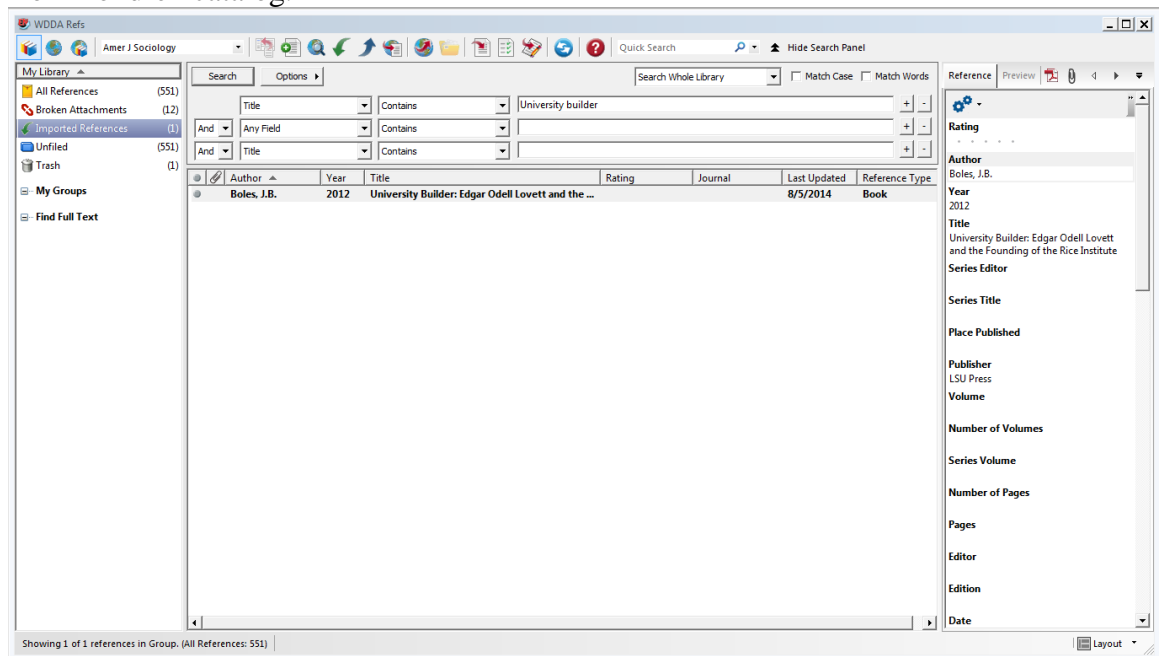
6. From this point, you will see different web browsers behave differently.

#### ➔ Google Chrome.

You will notice that the downloaded file appears in the lower left corner of the Google Chrome window. Once the download has completed, select the small arrow that appears just to the right of this file, check **Always open files of this type**, and click “Open”.



The downloaded *.enw* file will be imported to EndNote and you will see the reference record appears in the **Imported References** under the **Local Library Mode** and the record contains more information than that captured from Fondren catalog.



When you have “*Always open files of this type*” checked, next time you click on the link of **Export to EndNote**, instead of downloading the file, **Chrome** will import the *.enw* file directly to EndNote, saving you a couple of clicks.

### ➔ Internet Explorer

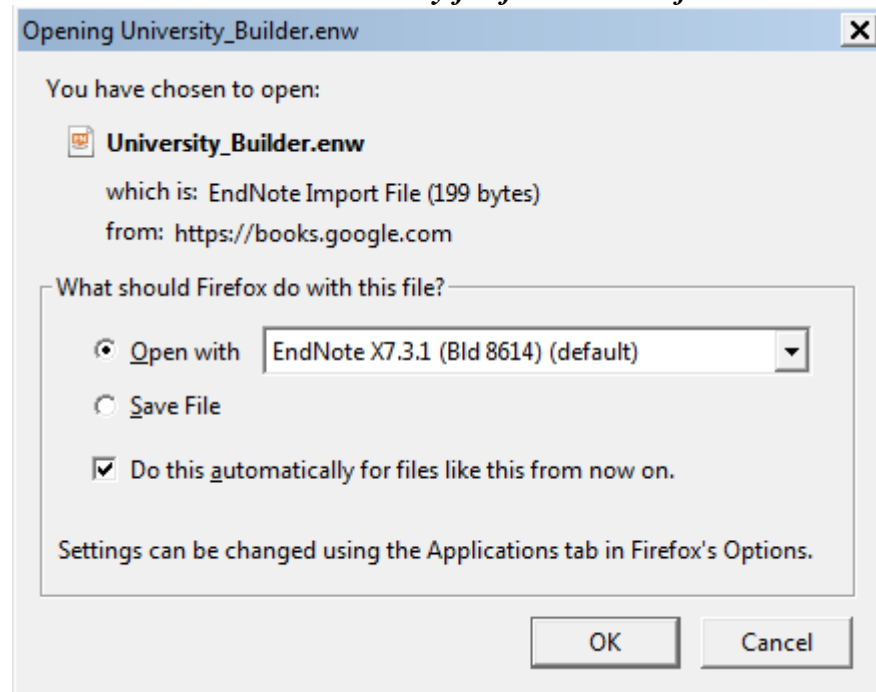
Click on **Open** on the pop-up message at the bottom of the IE web browser.



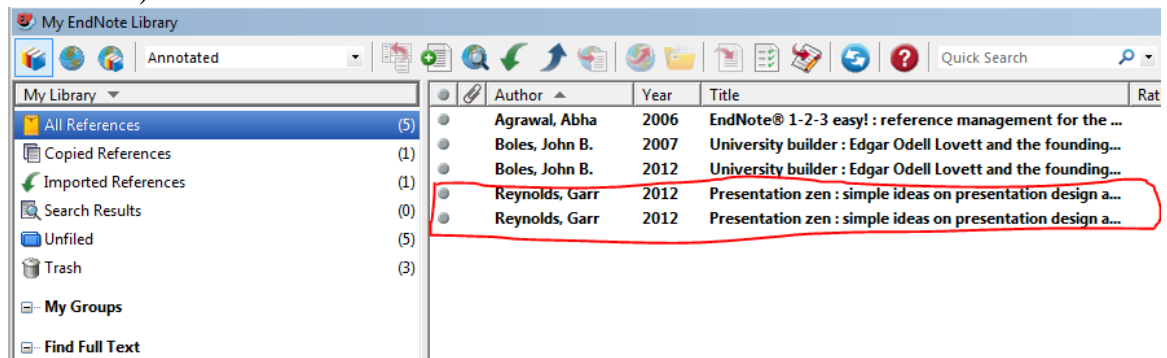
### ➔ FireFox

After you click on **Export to RefWorks/endnote**, the following window will pop up. Choose **EndNote X7.3.1** from the drop-down list and check

the box of *"Do this automatically for files like this from now on."*

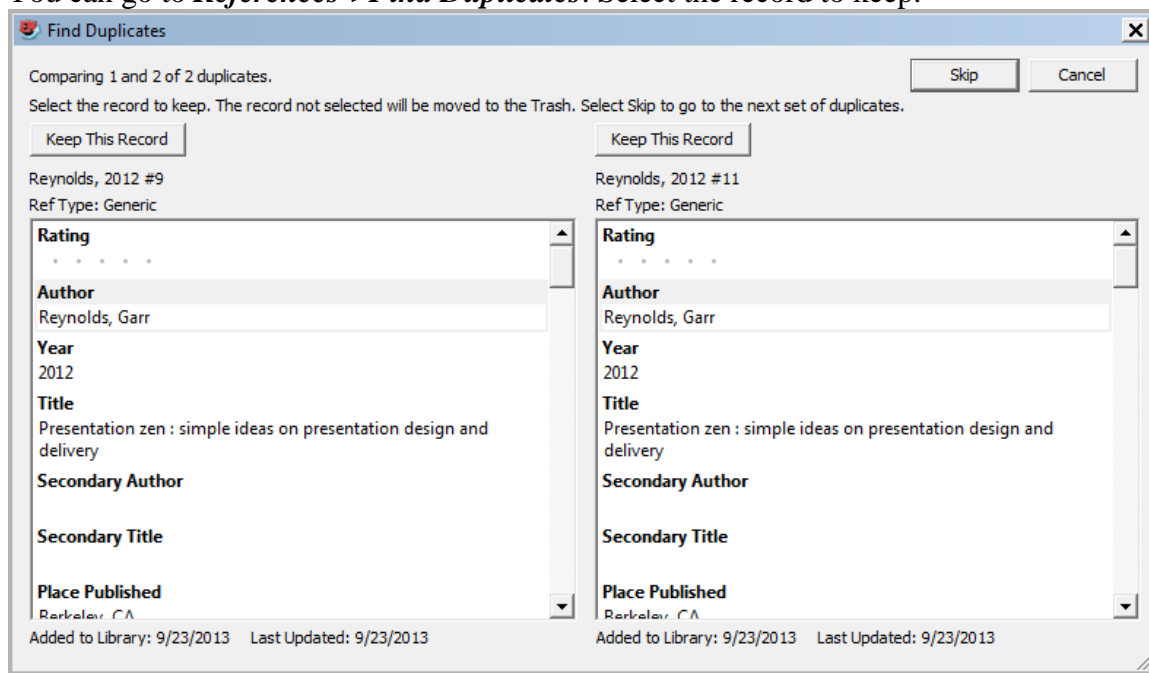


2. If an item is duplicated in your library (i.e. you have two or more copies of the same item).





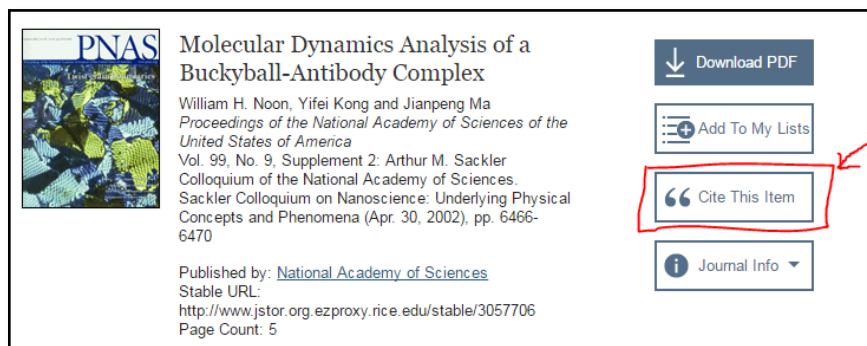
3. You can go to **References->Find Duplicates**. Select the record to keep.



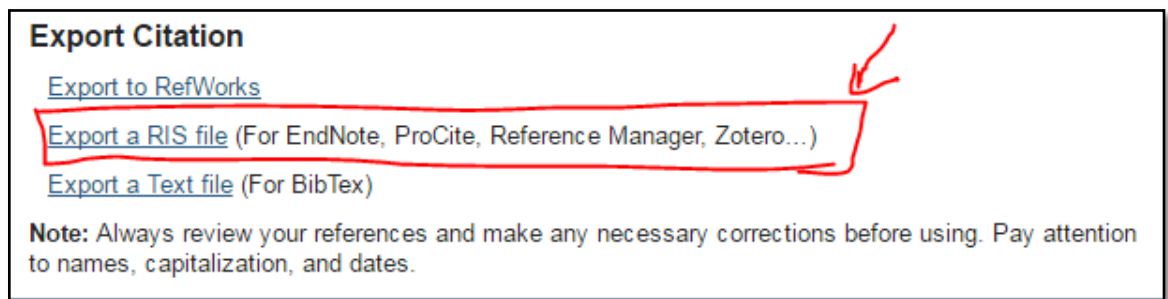
Note: By default, a reference is considered a duplicate if the Author, Year, Title, and Reference Type match a reference already in the library. You can change the duplicates criteria under Local Library Mode->Edit->Preferences-> Duplicates.

### **ACTIVITY 3:** Adding References from JSTOR using Google Chrome

1. Open a Google Chrome tab.
2. Go to library's home page at <http://library.rice.edu/>.
3. Type in **JSTOR** in the search box.
4. On the search result page, in the box of **Databases**, choose the first one JSTOR.
5. On the JSTOR's home page, in the search box, type in **uckyball "rice university"**, then **Search**. Click on the second (note: it might be different on your search result page.) item of **Molecular Dynamics Analysis of a Buckyball-Antibody Complex**  
[William H. Noon](#), [Yifei Kong](#), [Jianpeng Ma](#)  
on the search result page.
6. Click on **Cite This Item** in the Citation Tools box.




7. Choose **Export a RIS file**



8. The article record will be imported to the EndNote library.


Note: the associated pdf file will not be downloaded automatically.

If you want the associated PDF file downloaded, you have to click on  **Find Full Text...**, EndNote locates full text files on the Web by using data stored in your references. EndNote uses the following methods to find full text:

- Web of Knowledge full text links
- EndNote web services
- DOI (Digital Object Identifier)
- PubMed LinkOut

Once found, EndNote downloads and attaches the files to the references. When the Find Full Text search is completed, depending on the results, you may see a combination of three different groups under the Find Full Text group set:

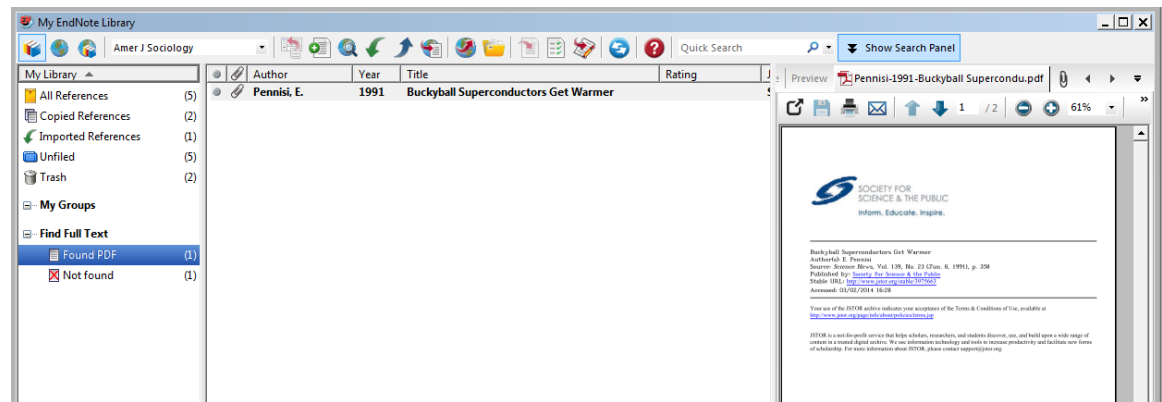
- Found PDF
- Found URL
- Not found

In this case, you select the record, click on  **Find Full Text...**, EndNote can't find a match.

You can manually download the pdf file, then right click over the record, File Attachments-> Attach File, locate the downloaded pdf file to attach. When prompted, save the change. By default, EndNote will copy the pdf file to the EndNote library file directory.

Go back to the search result page, select **Buckyball Superconductors Get Warmer**, E. Pennisi. Repeat the above steps under this activity; you will see "Found PDF"

under **Find Full Text**.



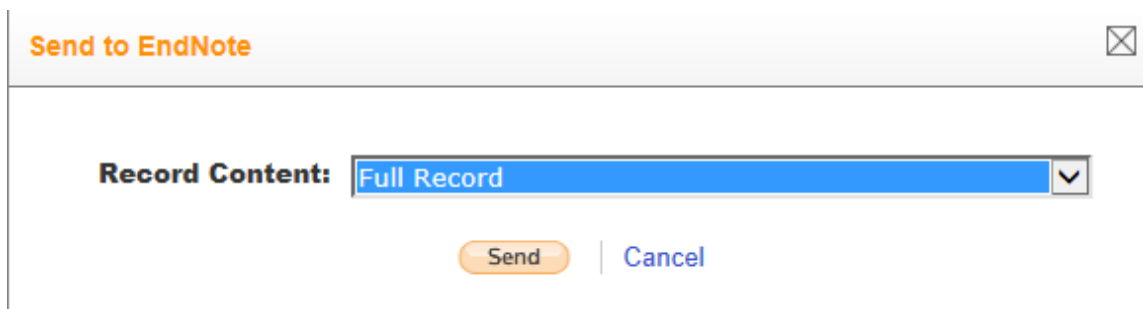
*Note: Find Full Text works best for journal articles with DOI numbers so be careful not to select the book and book section references and also try to avoid any articles that you know do not have a DOI.*

#### **ACTIVITY 4:** Adding References from Web of Science from Google Chrome

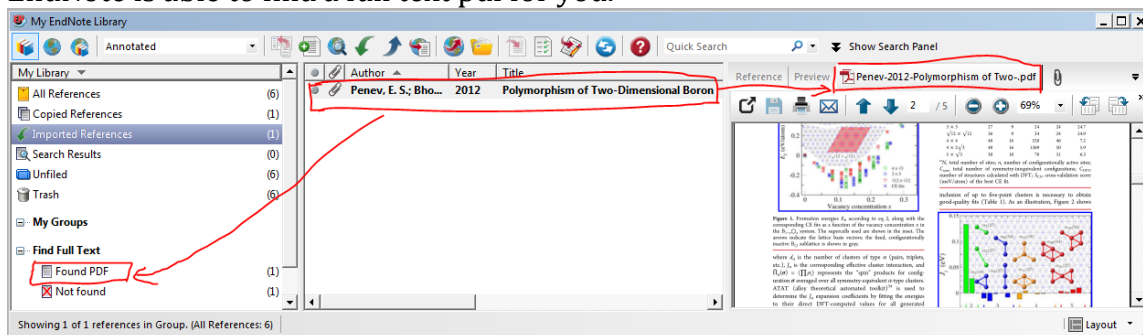
1. Open a Google Chrome tab.
2. Go to library's home page at <http://library.rice.edu/>.
3. Type in **Web of Science** in the search box.
4. On the search result page, in the box of **Databases**, choose the first one **Web of Science**.
5. On the **Web of Science**'s home page, in the search box, type in **buckyball** for **Topic** and **rice university** for **Address**, then **Search**.
6. Click on the first item on the search result page.
7. Click on **Send to EndNote**



8. Choose **Full Record** for the Record Content, click **Send** button.

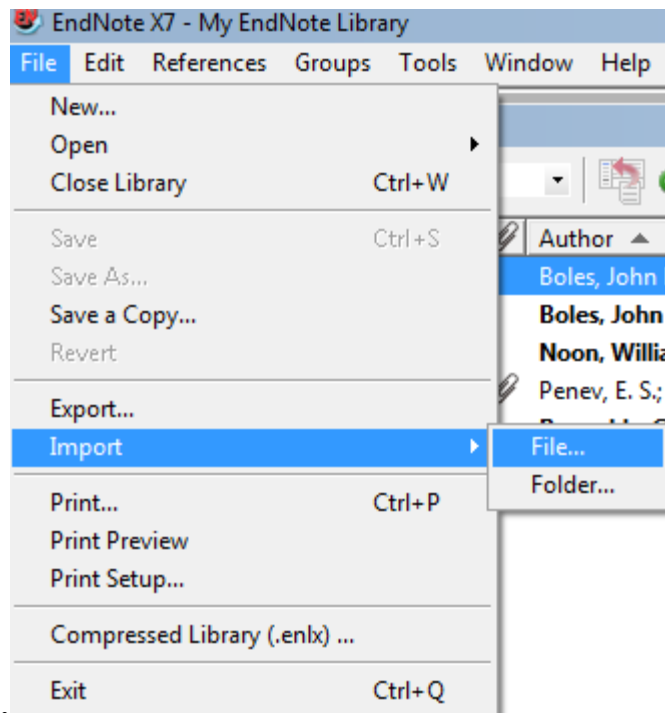


9. The record will show up in the library. If you click on **Find Full Text...**, EndNote is able to find a full text pdf for you.

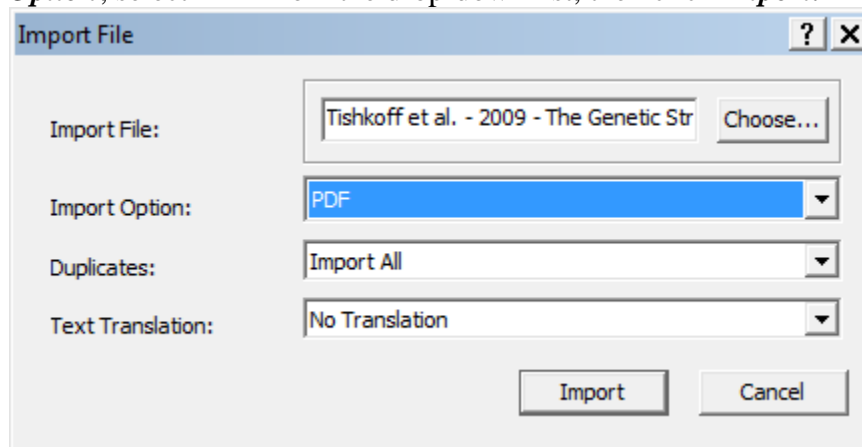


### **ACTIVITY 5:** Adding References by Importing PDFs

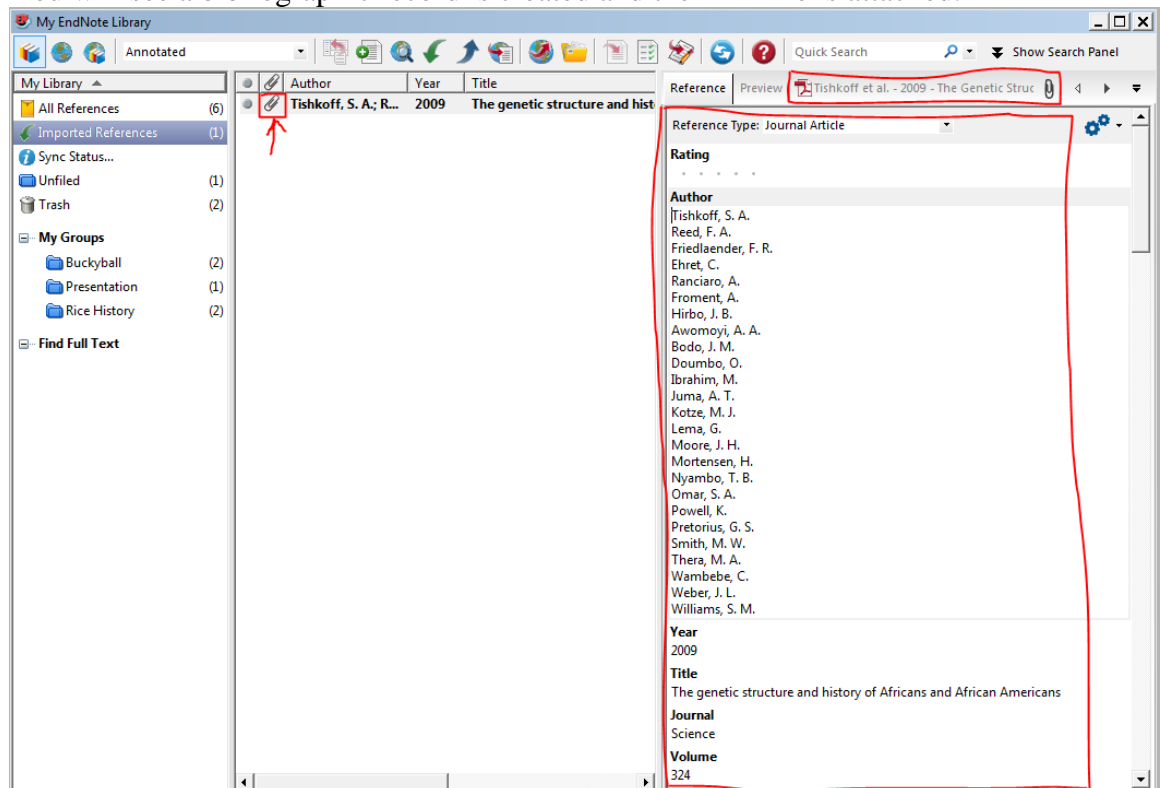
Many researchers find themselves managing a massive collection of PDFs. EndNote makes it a breeze to import these PDFs. If the PDF you are importing has a Digital Object Identifier (DOI) embedded in it, a bibliographic record will be created and the PDF will be attached to the record. Without the embedded DOI, the PDF will be imported, but you have to type in the bibliographic information manually for each imported PDF. Behind the scene, the system matches DOI information with data available from CrossRef ([www.CrossRef.org](http://www.CrossRef.org)) by capturing bibliographic content and creating new EndNote references.



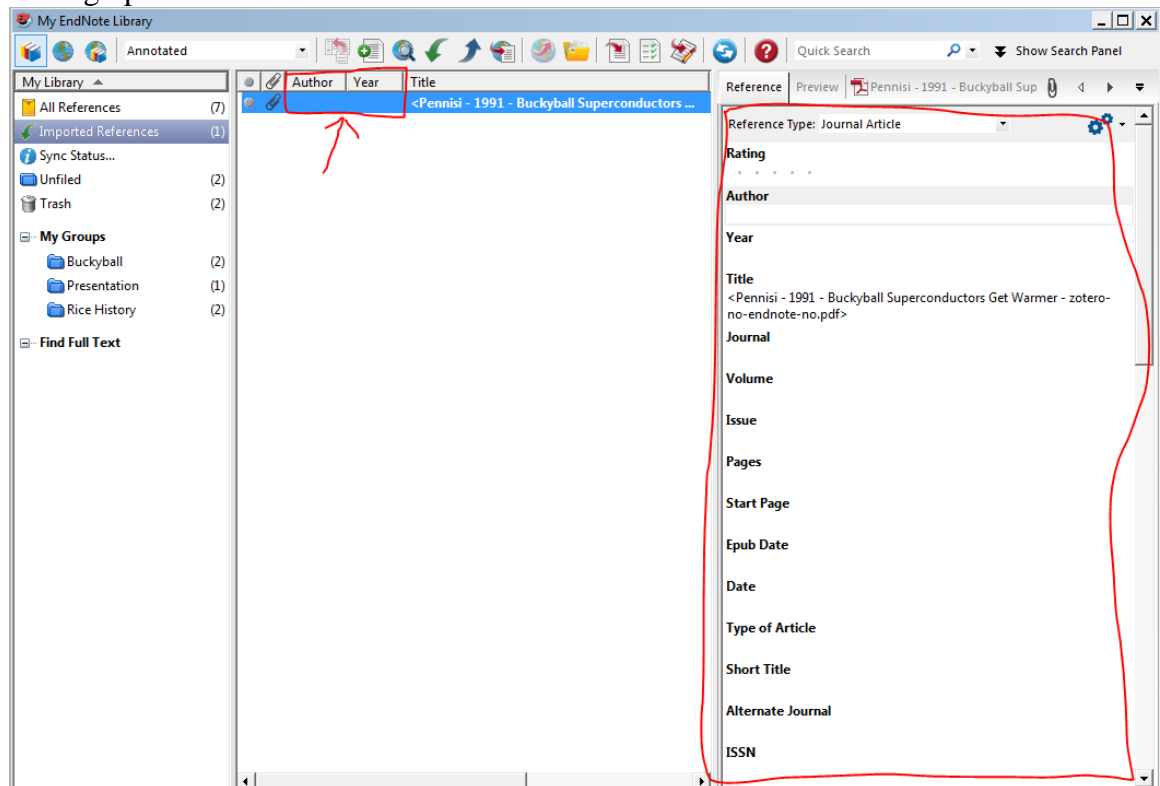
1. Go to **File->Import->File...**
2. Click on **Choose...** to navigate to your folder, select the PDF file, on the **Import Option**, select **PDF** from the drop-down list, then click **Import**.



3. You will see a bibliographic record is created and the PDF file is attached.



4. On the other hand, if the DOI is not embedded, you will see an empty bibliographic record.



Note: All the PDF files are saved into a related DATA folder. This folder is automatically generated when you create your EN library and it will have the same name as your library filename but with the extension .DATA. For example, for an EN library called *My EndNote Library.enl*, the folder will be called *My EndNote Library.DATA*. If you move your EN library to a different computer, always remember to copy the .DATA folder along with the library.

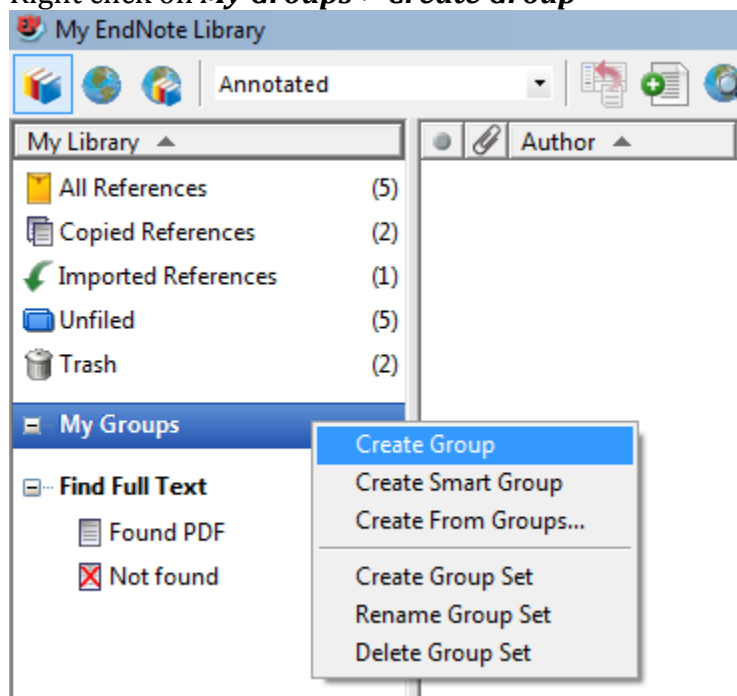
#### IV. Organizing References

The **Group** feature in EndNote enables you to organize your library based on research subject or topic. References can belong to several **Groups** or be deleted from a group while always remaining available in **All References**. Groups can be renamed or deleted. A **Group Set** can be created to include groups.

We recommend you to have one EndNote library and use Groups to organize your EndNote library. Don't create separate EndNote libraries for different purposes as this can give you problems when trying to use more than one EndNote library with a Word document.

#### **ACTIVITY 6:** Creating groups and organizing references

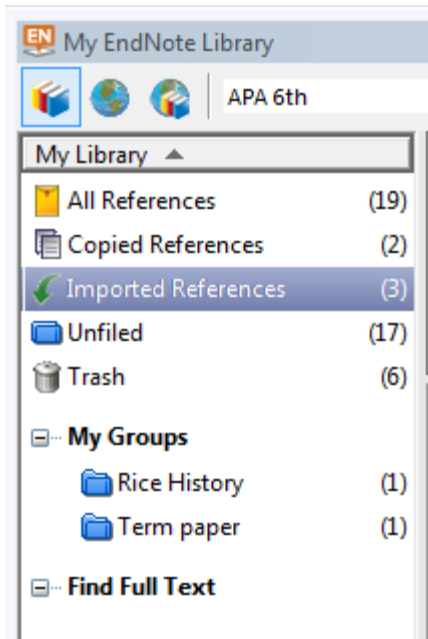
1. Right click on **My Groups**-> **Create Group**



2. Create three groups named Buckyball, Presentation and Rice History respectively.
3. Drag reference record to each group accordingly.

#### **Temporary Groups**

EndNote automatically generates Imported References and Copied References temporary groups under Local Library Mode.



The Copied References Group is replaced each time you copy a new set of references. And the Imported References Group is replaced each time you import a new set of references. EndNote removes the groups when you close the library. The references themselves remain in the library unless you specifically delete them.

#### V. Writing with EndNote

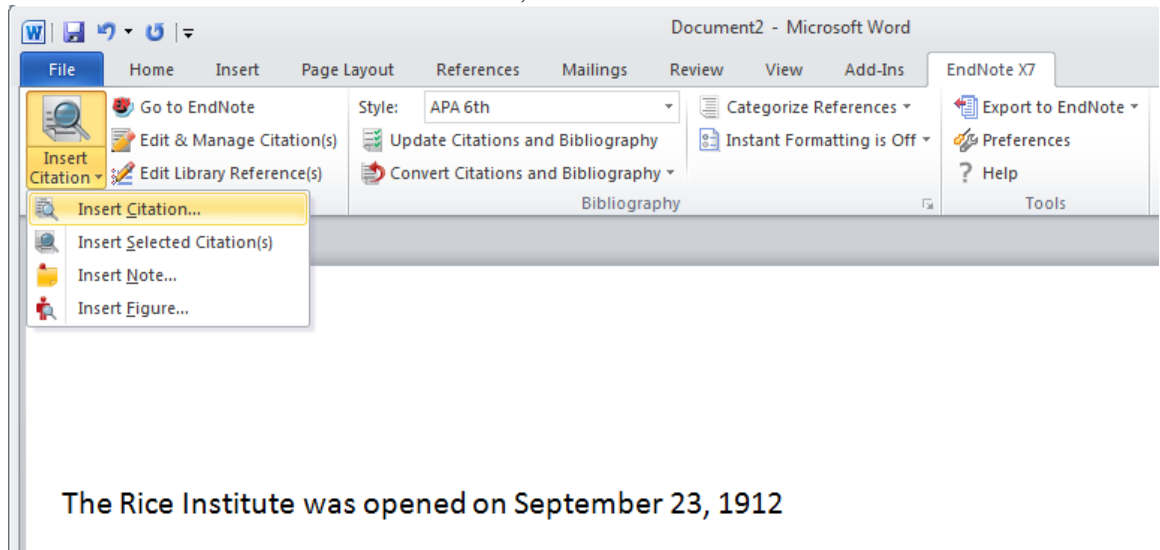
EndNote's Cite While You Write (CWYW) Word plug-in enables you to insert in-text citations in a Word document while simultaneously creating a bibliography for that document.

**ACTIVITY 7:** Inserting in-text citations and generating bibliography

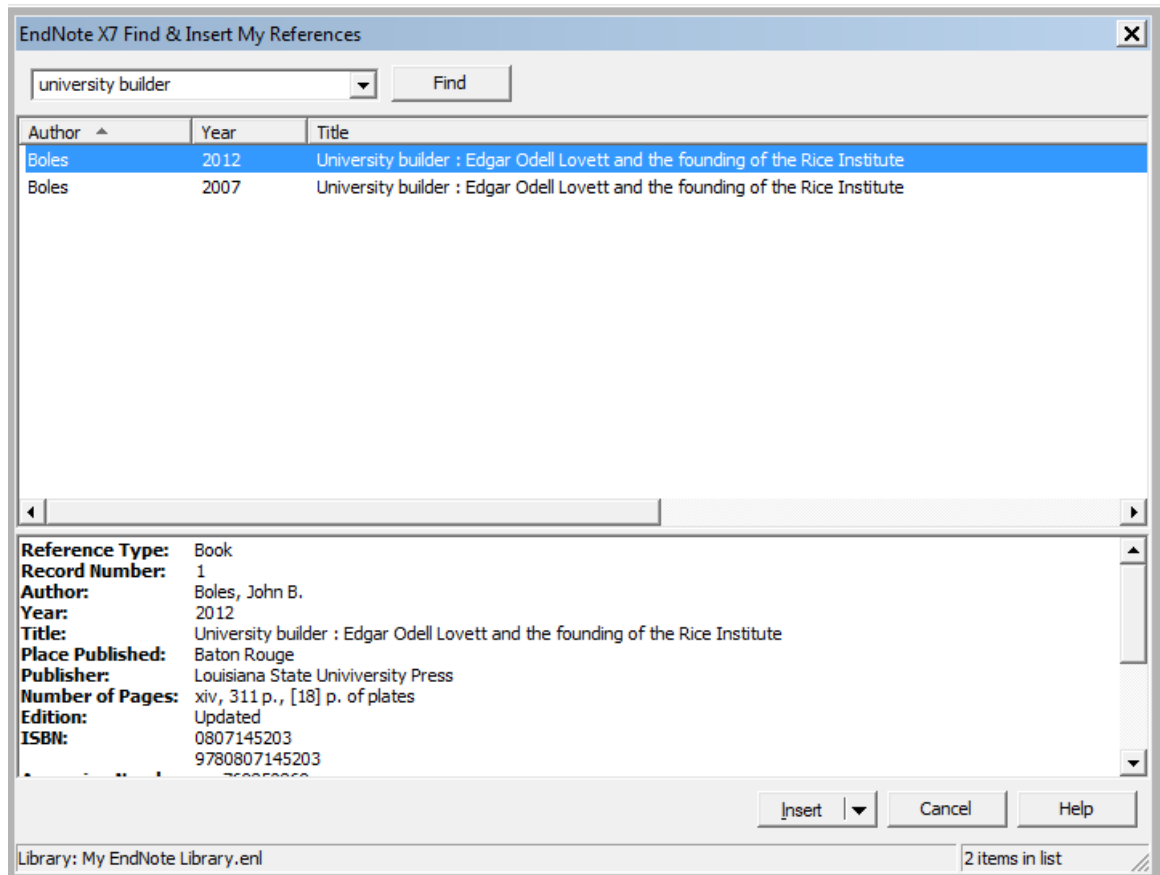
1. Open **Word** application.
2. The **Style** in the EndNote toolbar within **Word** application decides your new document's citation style.
3. Type a sentence "*The Rice Institute was opened on September 23, 1912*".



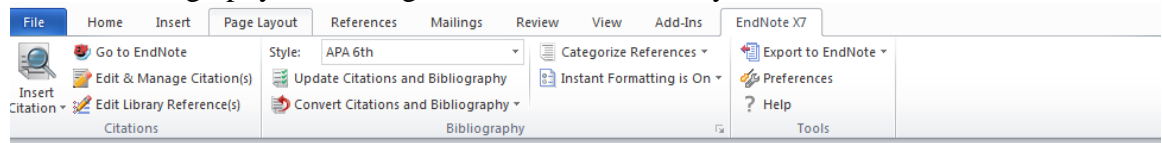
- Click on **EndNote X7** tab on the ribbon, then click on **Insert Citation**



- On the pop-up window, type in “*university builder*”, then click on **Find** button.





6. Select the first record, then click on **Insert**. The in-text citation is inserted and the bibliography record is generated simultaneously.



The Rice Institute was opened on September 23, 1912 (Boles, 2012).|

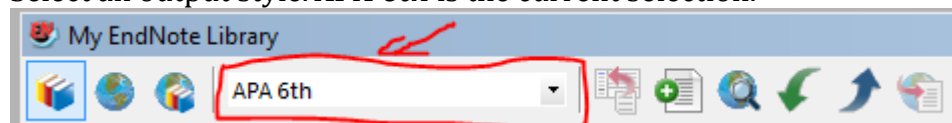
Boles, J. B. (2012). *University builder : Edgar Odell Lovett and the founding of the Rice Institute* (Updated ed.). Baton Rouge: Louisiana State Univiversity Press.

7. Alternatively, at step 3, you can click  **Go to EndNote**, this will open your EndNote X7 library.
  - a. Navigate your library and select the reference record you want to cite.

- b. Within EndNote 7, click on **Insert Citation** icon , an in-text citation will be added at the cursor's position. So does a corresponding entry in the bibliography at the end of the document.

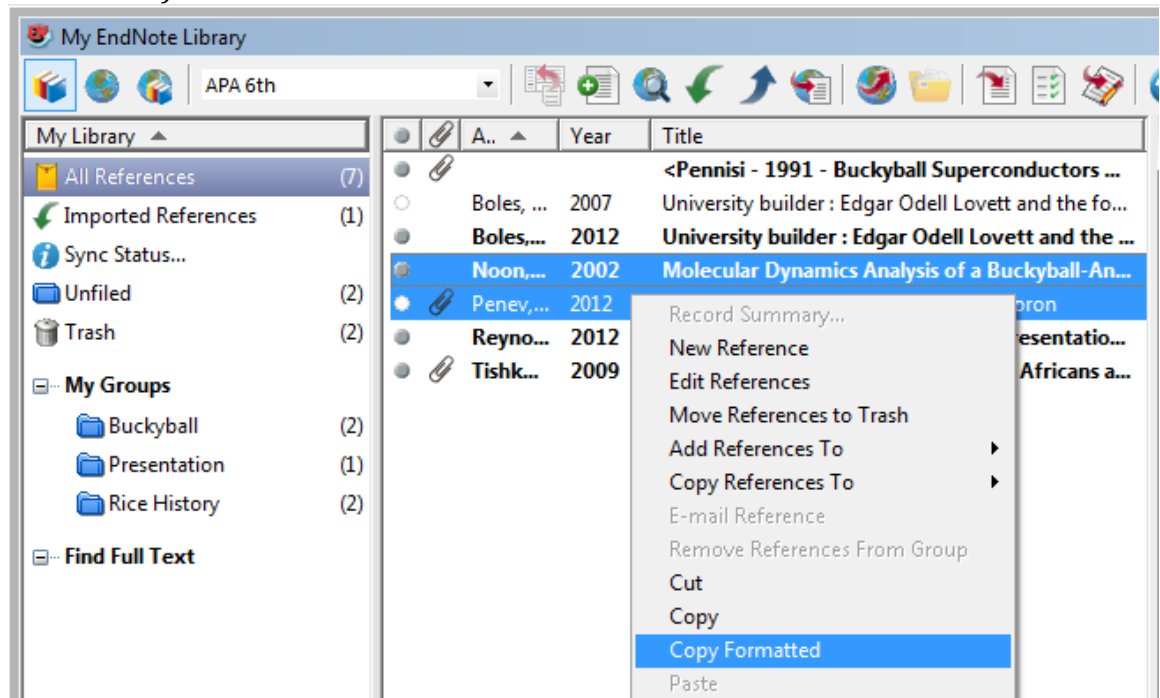
#### **ACTIVITY 8:** Creating an independent bibliography

1. Select an output style. **APA 6th** is the current selection.



2. Select the items in the **All References**, or from any Group, then right-click over the selected items, choose **Copy Formatted**. (Or **Edit->Copy**

**Formatted).**



3. Go to your text editor such as Word, paste the formatted bibliography.

Noon, W. H., Kong, Y., & Ma, J. (2002). Molecular Dynamics Analysis of a Buckyball-Antibody Complex. *Proceedings of the National Academy of Sciences of the United States of America*, 99(9), 6466-6470. doi: 10.2307/3057706

Penev, E. S., Bhowmick, S., Sadrzadeh, A., & Yakobson, B. I. (2012). Polymorphism of Two-Dimensional Boron. *Nano Letters*, 12(5), 2441-2445. doi: 10.1021/nl3004754

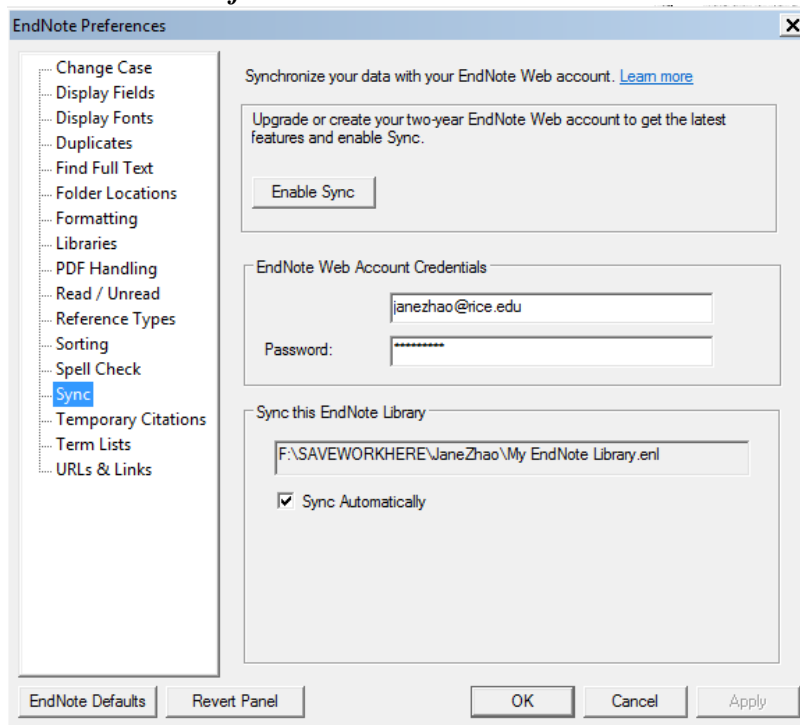
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## VI. Syncing EndNote

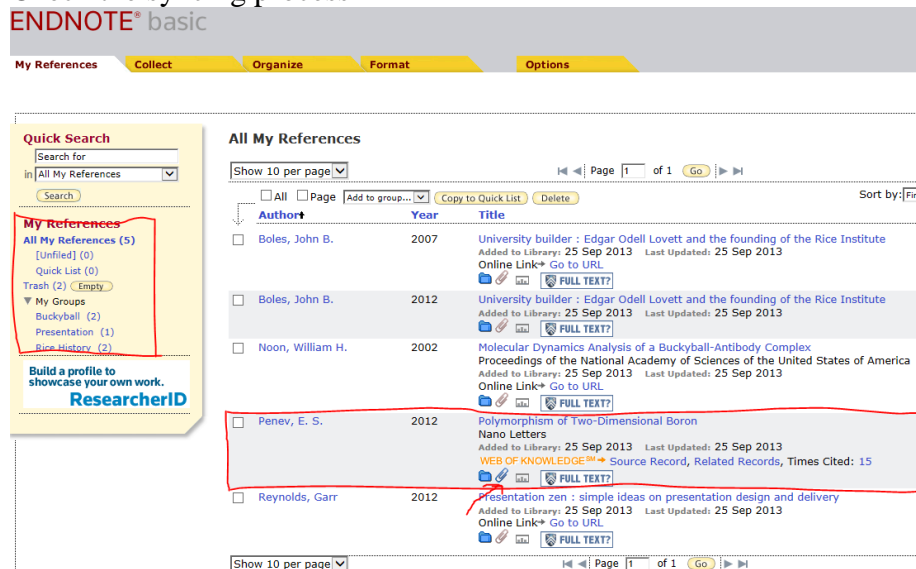
You can synchronize the references including file attachments in your EndNote library with the references in your EndNote Web library.

### ACTIVITY9: Syncing EndNote

1. Go to *Edit* -> *Preferences*



2. Type in your user name and password, then click on **OK** button.
3. If you check **Sync Automatically**, EndNote will sync every 15 minutes in the background. When you close EndNote, EndNote prompts you to Sync.
4. Login to your EndNote Web at <http://endnote.com/>
5. Check the syncing process



6. Note that all the reference records, groups, and associated pdfs are synced. (The sticky note and highlights in the pdf files are synced as well.)
7. The free version of EndNote Web (i.e. EndNote Online) allows you store up to 50,000 references and 2GB of attachments. And you have the top 20

popular bibliographic style. See <http://endnote.com/buy/enw> for more details.

8. If you have a paid version of EndNote desktop, you have unlimited references storage and file storage. For more information, see [https://www.myendnoteweb.com/EndNoteWeb.html?func=slogout&locale=en\\_us&](https://www.myendnoteweb.com/EndNoteWeb.html?func=slogout&locale=en_us&)

## VII. Collaborating with others using EndNote

→**ACTIVITY 10:** Collaborating with others using EndNote

### Library sharing

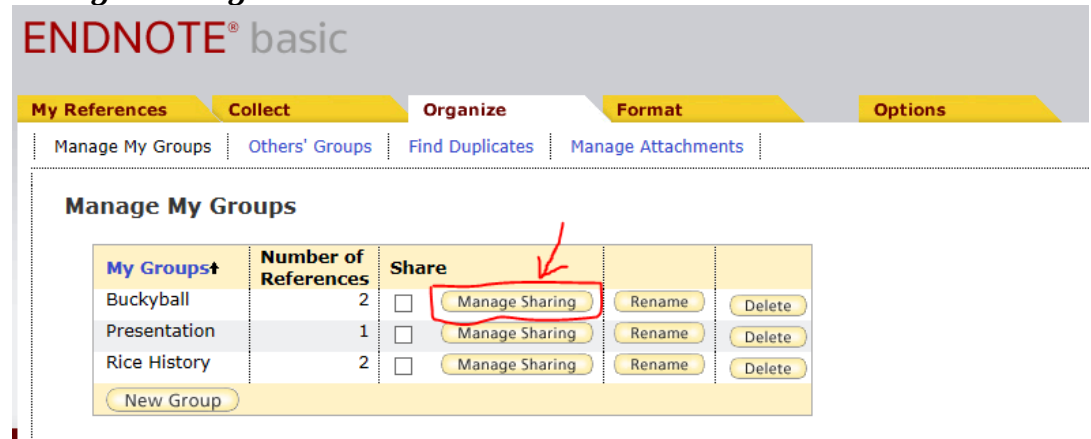
detailed information about library sharing:

<http://endnote.com/product-details/library-sharing>

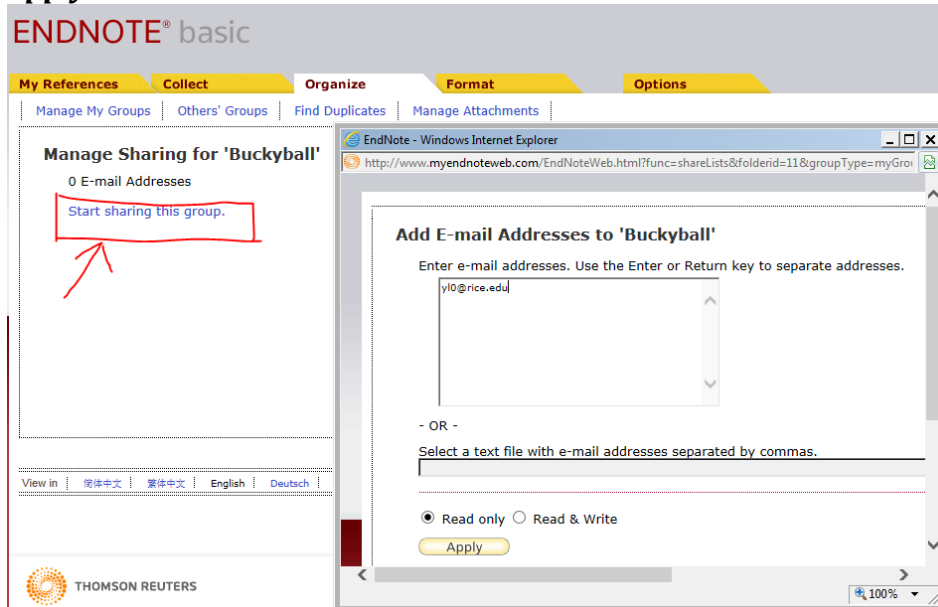
1. You must first set up your EndNote account and fully sync your library.
2. File->Share, and enter the email addresses of the people you want to share with (up to 14 people total, they have to have EndNote X7).
3. How to join a shared EndNote library
  - a. Accept the invitation
  - b. You must first set up your EndNote account and sign in.
  - c. File->Open shared library

### Group Sharing

1. Once you are logged in at <http://endnote.com/>, go to **Organize**, click on **Manage Sharing**

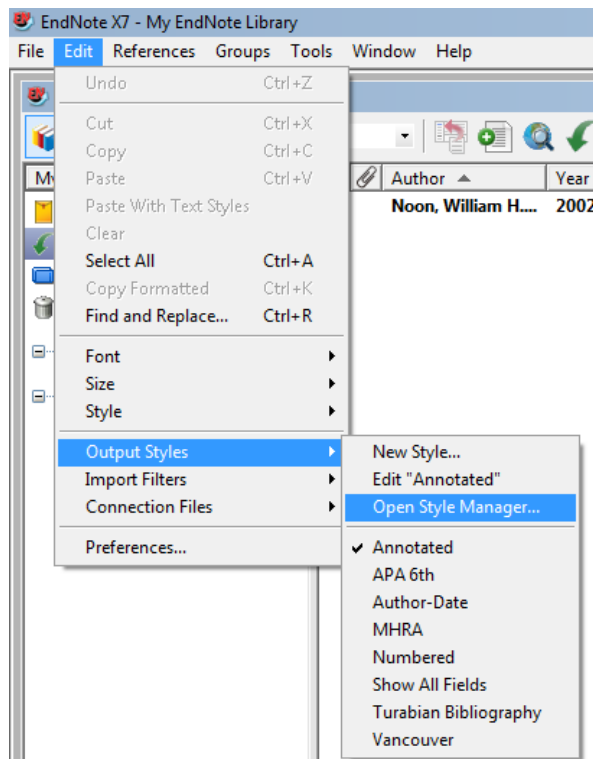


2. Click on ***Start sharing this group***, then ***Add E-mail Addresses***, then ***Apply***

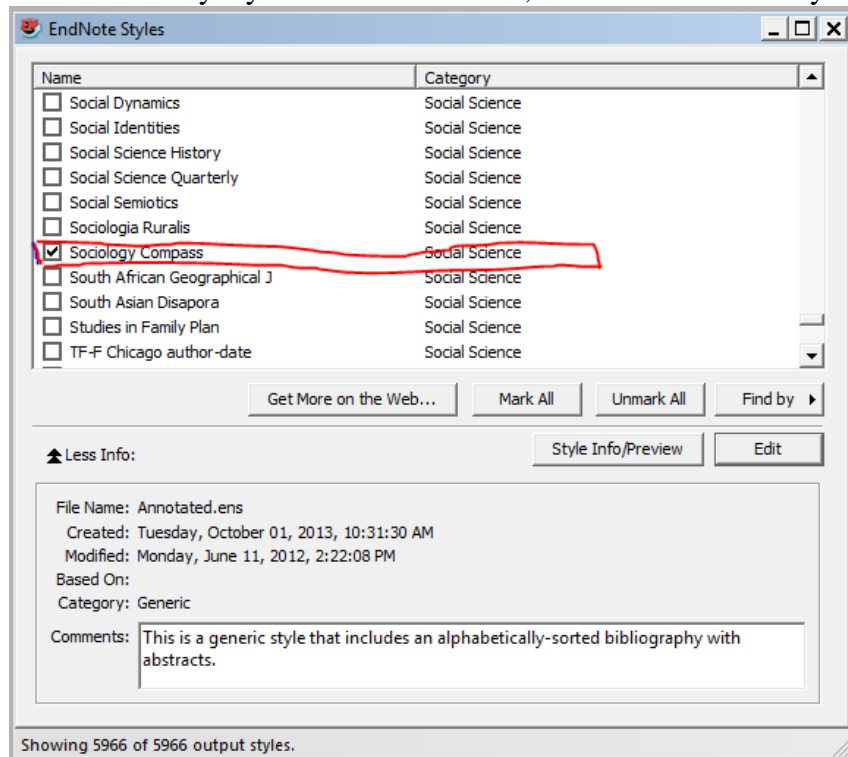


## FAQ

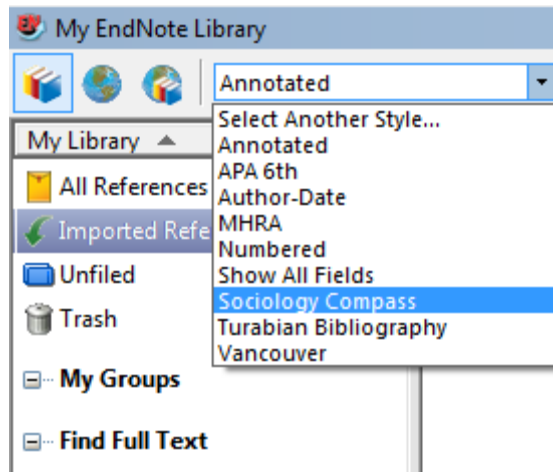
1. **How to capture reference information from websites such as Amazon?**  
Log in to your EndNote web, under ***Options, Download Installers***, drag ***Capture Reference*** button to your Bookmarks bar. To use it, browse to sites such as Amazon, find a book, click the ***Capture Reference*** button in the Bookmarks bar. The Capture Reference window will open. Follow the instructions in the window to import the reference information to my.endnote.com, the online version, or EndNote, the desktop version.
2. **If the style I need is not on the default list, how do I install it?**  
Go to ***Edit->Output Styles->Open Style Manager...***



Look for the style you need and check it, close the EndNote Styles window.



The new style will show up in the list of output style.



3. **How to combine chapters with EndNote?**

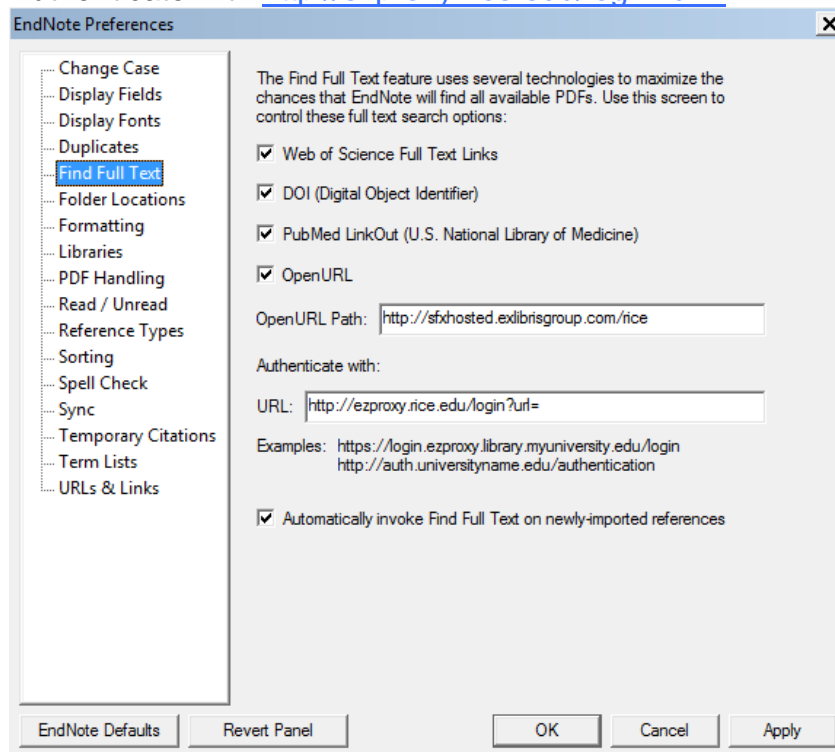
Go to the library guide at Women and Newborn Health Service at <http://kemh.health.libguides.com/content.php?pid=317464&sid=2832356>, scroll down to the bottom of the page for a step-by-step instruction on combining chapters.

4. The setup for the Find Full Text:

***Edit->Preferences->Find Full Text***

OpenURL path: <http://sfxhosted.exlibrisgroup.com/rice>

Authenticate with: <http://ezproxy.rice.edu/login?url=>





### Further Information

1. *EndNote X7Help*  
<http://endnote.com/support/helpdocs/EndNoteX7MacHelp.pdf> and  
<http://endnote.com/training/mats/enuserguide/eng/endnote7/enguide-full.pdf>
2. EndNote X7 Little How-to Book  
<http://endnote.com/kb/129310>
3. EndNote Guide at King Edward Memorial Hospital  
<http://kemh.health.libguides.com/content.php?pid=317464&sid=2761397>
4. EndNote Desktop Guide at University of Wisconsin-Madison Libraries  
<http://www.library.wisc.edu/citation-managers/endnote-desktop/>
5. EndNote at Bowdoin Library  
<http://libguides.bowdoin.edu/content.php?pid=145817&sid=1239841>
6. EndNote Guide at Saint Louis University  
<http://libguides.slu.edu/content.php?pid=29170&sid=1185068>
7. EndNote Guide at Auckland University of Technology  
<http://library.aut.ac.nz/?a=151875>