INTRODUCTION TO EndNote X9

for PC

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Abstract: EndNote is a reference management application that academic writers can use to streamline and simplify the research and writing process. You can export citation information to EndNote from online searches, attach PDF files to the citations in your library, then save time by creating an automatic bibliography in Word from your EndNote library.

Specific topics include:
• Downloading EndNote and creating your EndNote library
• Adding references to the library
• Organizing references in the library
• Attaching files to EndNote references
• Backing up your library
• Using Cite-While-You-Write in Word to automatically create and update your bibliography
Table of Contents

1. EndNote X9 Installation for PC ....................................................... 2

2. Working with the EndNote Library .................................................. 4
   Key Features (see image above) .................................................................. 5
   Selecting the Output Style ........................................................................ 5
   Exporting Citations to your EndNote Library: The Basics ...................... 6
   Getting Started with Google Scholar ..................................................... 6
   Including PDFs and Other Files in your Library ..................................... 8
   Frequently Encountered Pop-Ups (and what to do about them) ............ 9
   Other Common Sources for Gathering Citations ................................... 10
   ProQuest Databases ............................................................................. 10
   EbscoHost Databases ............................................................................ 11
   KU Libraries’ Home Page Search (PRIMO) ........................................... 12
   Using ISBN to Export Book Citations from WorldCat ......................... 14
   Collecting Citation Information from Web Sites .................................. 16
   Adding a Reference Manually .............................................................. 17
   Working with your References in the EndNote Library ......................... 18
   Toggling the Sort Order ........................................................................ 18
   Searching for References ....................................................................... 18
   Viewing and Editing References .......................................................... 19
   Creating Groups of References ............................................................ 20
   Deleting a Reference ............................................................................ 20
   Backing Up Your Library ....................................................................... 21
   Compressing the EndNote Library ......................................................... 21

3. Cite While You Write: Using EndNote in Word .................................. 22
   Working with Citations .......................................................................... 22
   Inserting In-Text (Author, Date) Citations ........................................... 22
   Inserting In-Text Citations as Footnotes .............................................. 23
   Deleting Citations ................................................................................ 24
   Editing Citations .................................................................................. 24
   Turning off Instant Formatting ............................................................. 26
   Why is the Bibliography Single-Spaced? Finalizing the Bibliography Layout .... 26
   The Final Copy ................................................................................... 27

4. Other Useful EndNote Functions ....................................................... 28
   Importing Previously Stored PDF Documents to EndNote ................... 28
   Using the Find FullText feature ............................................................ 29
   Setting Automatic Naming for PDFs .................................................. 30
   Exporting Bibliographies from EndNote ............................................... 30

5. EndNote Sync and Shared Library Functionality .................................. 32
   Using EndNote Sync ........................................................................... 32
   To synchronize across more than one computer .................................. 34
   Sharing Libraries ............................................................................... 35
   Receiving a shared library .................................................................... 35
   Sharing a library with others .............................................................. 36
   Backing up the shared library ............................................................. 37

6. For More Information ......................................................................... 38
   KU Information Services ...................................................................... 38
1. EndNote X9 Installation for PC

EndNote X9 is free for KU graduate students, faculty and staff.

1. To begin, go to https://kusoftware.ku.edu/local-login and click on the button that says “Login with KU Online ID” underneath KU Lawrence Users.

2. Input your KU online ID and your password.

3. Once you are signed in, choose EndNote X9 from the menu of software packages on the screen.

4. You will be presented with information about the program. From here, click Add to Cart.

5. The next window should show what is in your cart, and give you the option to Download.
6. After clicking Download, you will have the option to choose either EndNote X9 for Mac or PC. Click on _Install EndNote X9 – Windows._

7. Download the .exe file and begin the installation process. Follow the installation prompts, and when asked for a product key, return to the “My Software” page and click on EndNote License Key. Input this string of letters/numbers during the installation process.

8. When the installation is complete, you should be able to open EndNote from your applications by clicking the window in the left-hand corner. You should also see a new EndNote tab in your Word document, as in the image below.
2. Working with the EndNote Library

If EndNote does not open automatically for you when the installation completes, or to access it again later, open it from the Window icon in the lower left-hand corner of your screen. Click All Programs then on the EndNote file folder and finally on the EndNote program icon to open it.

1. When you open EndNote the first time, you will be prompted to create a new library or open an existing one. Click Create a new library and then OK.

2. In the Save in drop-down box, navigate to the folder where you would like to keep your new library, if you wish. (If you do not choose a new location, EndNote will automatically reside in your documents folder, a default option which is generally convenient for most users.)

3. In the File Name box, enter the name for your new library and click the Save button.

4. Your new library will appear. While your new library will be empty, a library with sources will look something like the one below.

Described below according to the green numbers in the above image, some key features to know about this library as you begin include:
Key Features (see image above)

A. The My Library pane shows the file system for your library. The All References folder is your library’s “home base”—a master file where all your references are stored. Below this, you can create groups to categorize your references (more on this later.)

B. The style selection box allows you to designate the citation style for your library. When you first open EndNote, it will be set to a citation style called “Annotated.”

C. The middle pane shows a listing of the references in your library.

D. The right-hand pane provides previews of reference information. Notice the three tabs, Reference, Preview and Attached PDFs, along the top of this pane.
   • In the Reference tab, you can see and change, at a glance, the citation information of any reference.
   • The Preview tab provides a preview of the citation as it will appear in your bibliography (based on your selected citation style—see item 2). Attached PDFs can be viewed in the Attached PDFs tab.

Selecting the Output Style

It is important to set the output style to the one that you plan to use or that is required by your discipline, department or journal, as it will determine the appearance of in-text and bibliographic citations as well as EndNote previews. EndNote will remember your favorite styles and keep them in the drop-down list, but when you first begin, you will need to add your styles.

1. To change the style, click the drop-down arrow in the style box (labeled #2 above) and look for your style in the list that appears. If you do not see it, click Select Another Style… from the top of the list.

2. From the Choose A Style pop-up box, select your style from the list then click Choose.

There are over 500 styles to choose from and many more available online at www.EndNote.com/downloads.styles.

New styles are added regularly to those available for download from EndNote.com, and styles for many journal articles are also available. Step-by-step installation instructions are included on the download page as well.

You can also edit and customize styles to fit your own needs. Visit the library’s EndNote website for detailed instructions: http://guides.lib.ku.edu/citation/EndNote.
Exporting Citations to your EndNote Library: The Basics

For all databases at KU that will export to EndNote, step-by-step export instructions are available at: http://www.lib.ku.edu/endnote-citing-instructions. Use the search bar to find the database you need quickly.

Getting Started with Google Scholar

Google Scholar is a popular search engine for academic research. Using Google Scholar while logged into the library will help expand the range of your search and will make more electronic texts available to you. You will also need to be logged in to export citations to EndNote.

Initial Setup

1. First, from the KU Libraries home page (www.lib.ku.edu) click Articles and Databases under Find. In the next window, click G under Databases A-Z to then scroll through the Gs to locate and open Google Scholar.

2. Before you begin your search, you will need to set up Google Scholar to export to EndNote. In the upper right corner of the Google Scholar home screen, click Settings.

3. Under Bibliography manager in the Scholar Settings menu, click Show links to import citations into and from the drop-down menu, select EndNote, then click Save.
Google Scholar will save these settings for your current computer and internet browser. Now conduct your Google Scholar search as usual. Although some databases allow simultaneous export of multiple references, in Google Scholar, references must be exported one at a time.

To Export

1. First choose the article you want, then click Import into EndNote.

2. EndNote will open automatically and the reference will appear in the Imported References folder. It has also been added to the All References group.

Open or Save?

You may frequently encounter pop-ups asking whether you want to “Open with” or “Save.” To help keep things running smoothly:

Choose OPEN if you’re exporting citations into EndNote.
Choose SAVE if you’re downloading a PDF.
Including PDFs and Other Files in your Library

The next step is to return to the databases to collect and attach the PDF files that did not come through using the Find Full Text command. For this, it is a good idea to keep your library searches open in Firefox until you are sure you have collected and attached all the necessary PDF files.

1. Click back over to your online databases screen (in this case, Google Scholar). In the example below, clicking either [PDF] duke.edu or Get at KU will provide a re-direct to the article.

2. Save the article to your desktop or any other location that is easily accessible. (If you do not see an option to save, click control+S to prompt it.)

3. Back in your EndNote library, click once on the reference to highlight it then right-click to open additional options.

4. From the menu, click File Attachments, then move across to Attach File.

5. Navigate through your file system to find the file you need, then click Open.

6. When finished, click away from the listing. You will be prompted to save and a paperclip will appear to indicate that the file has been successfully attached.
Frequently Encountered Pop-Ups (and what to do about them)

In Firefox
Firefox may ask whether you intend to open or save the file. If this happens, click **Browse**, then select EndNote X8 or ResearchSoft Direct Export Helper as your helper application.

Click **OK** in both windows.

In Internet Explorer
As a final step in the export process, a pop-up message may appear at the bottom of the screen asking if you want to open or save the citations. Choose **Open** and the export process will finish automatically.

In both Firefox and Internet Explorer:
From some KU databases, the Import to Citation Manager box will pop up as a last step in completing the export. For this box, simply accept the UTF-8 encoding by pressing **OK**.
Other Common Sources for Gathering Citations

ProQuest Databases

1. To export multiple citations from a ProQuest database, click the boxes to the left of the title.

2. Next, from the same screen, click the menu item labeled Save.

3. From the drop-down list, select **RIS (works with EndNote, Citavi, etc.)**.

4. In the pop-up Export/Save box, click Continue. (If you do not see the green Continue button, look for a pull-down scroll bar on the right-hand side of the box.)
**EbscoHost Databases**

1. Conduct your search then click the **Add to folder** icon for citations you plan to export.
2. Next, click **Folder** from the top of the screen.
3. In the Folder screen, click on the boxes next to the articles to be exported or click the **Select/deselect all** box from the top, as indicated below.
4. Click **Export**.
5. In the final screen, check **Direct Export in RIS Format** and then click **Save**.
**KU Libraries’ Home Page Search (PRIMO)**

1. Begin by typing in your search query and clicking **Search**. Type exact titles to pull up a specific book or other resource (or use the Advanced Search options).

2. In the results screen, use the options on the left to narrow your search. This search has been narrowed to include only books.

3. Find the book (or other item) that you need.

4. Click on **Details** in the horizontal list of options along the bottom of the entry.

5. Hover over the **Email/Print/Export** option to the right.

6. From the drop-down list, click **Export RIS (Endnote, Zotero)**. The export should continue automatically from here.
You can also select multiple items from the KU Library search results. To do this:

1. Conduct your search.
2. When you see results you’d like to keep, check the box to the left of the title, then click eShelf from the top of the page.
3. Your items will appear in a shopping cart format. Select the citations you want to export or click the top box to select all.
4. From the drop-down box on the right, choose **Push to RIS (EndNote, Zotero)** and click **Go**. (Do not choose EndNote Web unless you have an EndNote Web account.)
Using ISBN to Export Book Citations from WorldCat

You probably have several physical books on your bookshelf or desk that you would like to include in your EndNote library or cite in your papers. The WorldCat database makes it easy to export exactly the right citation information for these.

1. From the KU Libraries home page, click on Articles and Databases, and then choose WorldCat from the far left-hand box.

2. Find the ISBN number for your book (usually it is located near the copyright information) and type it into the ISBN box in WorldCat. Exclude hyphens.

3. Click Search.

4. Check the one you want from the list and then click Export.
6. In the next screen, check **Marked records from this search** for the **Export** option and **EndNote** for the **Export to** option, then click **Export**.

7. Your web browser may need you to confirm EndNote as the application. Be sure this is set to “Open with” and not “Save File.”

8. When asked to choose and import filter, select **WorldCat (OCLC)** and then click **Choose**. (Do not choose WorldCat Diss.) The export should complete automatically from here.
Collecting Citation Information from Web Sites

You can download website citations into EndNote Web or, if you prefer, send them directly to your desktop version of EndNote instead, but you first need to set up an EndNote Web account and add the Capture Reference bookmarklet. Here’s how:

1. To begin, set up an account at www.myendnoteweb.com if you haven’t already.

2. From the home screen of your EndNote Web account, choose Downloads and then click and drag the dark grey box that reads Capture Reference to your bookmarks toolbar. As the instructions specific, “in some browsers, you may need to right-click and select ‘Add to Favorites’ or ‘Bookmark This Link.’ (In Firefox, if you cannot see your bookmarks toolbar, try clicking View then Toolbars then Bookmarks Toolbar.)

3. Next, visit a website from which you plan to capture citation information. (If you have books to add, Amazon.com is a good place to begin).

4. Open the article or page you for which you plan to capture citation information, then click the Capture Reference button in your toolbar.

5. The Capture New Reference pop-up box will open.
   - At the top of this box, choose whether you plan to send this citation to EndNote Web or EndNote.
   - Check the fields in the box for completeness and accuracy, according to your bibliographic needs. The autofill feature here works better in some sites than others, so you may have to add some information by hand.

6. When your citation is complete, click the Save to button to finish the process.
**Adding a Reference Manually**

If you have resources that need to be included in your library but are not available for download (such as interview transcripts, datasets and unpublished manuscripts), you can add them to EndNote manually using the New Reference function.

To enter a new reference into an EndNote Library:

1. Click on the green **New Reference** icon. A window with a blank reference will open.

2. From the Reference Type drop-down menu, select the appropriate reference type. (There are several options—some are shown to the right.) Different reference types have different available fields, so choose the type first before you enter any information.

3. Type or paste the information for the reference into the appropriate fields and attach files. When you are finished entering the reference information, simply click the **X** at the top and the information will be saved. You will then return to EndNote's main screen.

   ![New Reference Window](image)

   ![Reference Types](image)

**Note:** Add author information last name, comma, first name, with a hard enter between each name. For institutional authors, such as the Department of Education, place a comma at the end of the name to keep EndNote from trying to use last-name-first formatting in your bibliography. *(This will help you avoid output such as: of Education, Department.)*
Working with your References in the EndNote Library

Toggling the Sort Order
From the middle pane of EndNote, references can be sorted according to the fields included in the overhead bar (highlighted in green below).

- Click on any of the fields to sort by that field and again to reverse the order in which the references are listed in the EndNote library.
- References are arranged in alphabetical order by author as a default for EndNote. Sorting by Last Updated, however, is particularly helpful when you want to see your most recent additions to the library.
- You can also right-click on the headings bar to select fields to add or exclude. In the picture below, for example, the Ratings, Reference Type, Volume and URL fields have been removed.

Searching for References
You can search for references from within the library using either the Quick Search box at the top or from the Advanced Search box. The screenshot below shows some of the tools and functions of the Advanced Search box.

1. To access or hide the Advanced Search box, click Show/Hide Search Panel.
2. Hover here and pull down to increase the height of the Advanced Search window.
3. You can add or reduce parameters by clicking the plus and minus icons to the right.
Viewing and Editing References

The preview pane on the far right of the EndNote home screen gives a preview of any selected reference (highlighted in green below). Click in any of the fields to edit.

To open the full reference, double click on it from the list in the middle pane.

- Scrolling downward through the full reference reveals fields such as Abstract, Notes, File Attachments and Research Notes.
- You can use the Research Notes field to add up to 22 pages worth of your own text.
- You can attach up to 45 additional files. Notice that they will line up in the tab at the top as well as in the File Attachments section of the reference. From the File Attachments location, the PDF will open in your default PDF viewer. Using the upper tab to open the PDF, however, will display it in EndNote's viewer, which includes sticky note and highlighter functions (and saves your changes in EndNote).
Creating Groups of References

Groups act as the file system for your references, allowing you to create sub-collections within your larger library.

Labeled in the screenshot on the right:

1. A **Group Set** gives a title to a collection of groups and allows you to expand and collapse your filing system to suit your needs.
2. A **Group** is simply a file folder holding a collection of references you’ve chosen. These references are also stored in the All References folder.
3. **Smart Groups** are groups that populate automatically based on parameters you choose.

**Groups**

1. From the drop-down **Groups** menu, click **Create Group**.
2. Type a name for your new group in the box.
3. You can drag and drop group folders as needed.
4. To add references to a group, right-click on the reference (use shift+click and/or control+click to select multiple references) then hover over **Add References** to choose the correct group from the pop-up list.
5. To remove items from a group, click once on the item (or use Control+click to highlight multiple items), then right-click and select **Remove References from Group**.
6. To delete a group, simply click on it once to select, then right-click and choose **Delete Group**.

**Group Sets**

1. From the drop-down **Groups** menu, click **Create Group Set**.
2. **Create Group Set**.
3. Type a name for your group set in the box.
4. You can drag and drop group sets as needed.
5. Use the plus and minus signs to expand and collapse group sets.
Smart Groups

1. Choose Create Smart Group from the Groups drop-down menu.
2. Fill in the boxes to define the parameters of your group. You can use any of the fields to set up parameters. You may need to tweak your parameters to ensure that your smart group is capturing the references you want. Use the plus and minus icons to add or remove parameters.

Deleting a Reference

From the All References folder, highlight the reference then press Delete to permanently remove a reference from your library.

Backing Up Your Library

Because EndNote stores your library as two files—a .enl library file which contains your citations and a .data file which contains your PDFs—it is important to “compress” these together before attempting to move or copy the library.

Compressing the EndNote Library

1. From the File menu, click Compressed Library (.enlx)…
2. The defaults presented in the Compressed Library pop-up box will likely be the ones you will want to use. Make any adjustments and then click Next.
3. In the Save Compressed Library choose a location and name for your file, then click Save. (Note: If you want to save your library to a flashdrive, you can choose the drive as the location and click Save.)
4. From that location, you can now move or copy the file with the .enlx extension.
5. When you are ready to open the file, simply double-click on it. You can open it from any other computer that has EndNote installed, including Mac-based systems.
3. Cite While You Write: Using EndNote in Word

One very useful feature of EndNote is **Cite While You Write** (CWYW), which enables you to insert formatted citations and build a bibliography within your document at the click of a button. Once EndNote is installed, the CWYW tools appear as a tab (highlighted in green below) in the top of the MS Word ribbon.

### Working with Citations

To use CWYW tools, you must open your Word document and your EndNote library. Commonly used citation styles may either use an in-text (Author, Date) format (APA and MLA styles, for example) or may instead utilize footnotes (like Chicago). Instructions for both are included below. For any citation style, however, begin by ensuring that it appears in the Style box of your Word document (highlighted in green above). Use the drop-down arrow here to change it if necessary.

**Inserting In-Text (Author, Date) Citations**

1. Position your cursor within the document where you intend to place the in-text citation(s).

2. Click on the **EndNote X8** tab then click **Insert Citation** and, from the drop-down options, click **Insert Citation** again.

3. EndNote will open a pop-up search window. In the **Find** box, type a keyword or author name for the citation you need, then select it from EndNote’s search results. (You can also select multiple citations by clicking on the ones you want while holding down the Control key.)

4. When you are finished, click **Insert**. You can also click the drop-down arrow on the **Insert** button to exclude author’s name or year.
5. EndNote will automatically insert the citations you have selected. Note at the bottom of your document that EndNote begins your bibliography as well. EndNote will update this bibliography as you make changes to your document.

I need to insert a citation here (Anderson, 2015).

Work Cited


Alternatively, you can also add citations by clicking on Go to EndNote from the EndNote ribbon in Word. This will simply pop your EndNote library onto your screen and here, you can have a certain group or section of your library open for use. Click the citation (or Control+Click for multiple citations) and then click the Insert Citation button to finish. This approach is especially useful if you want to be able to see your EndNote library while adding citations. If you work with two screens instead of one, you can have your EndNote library open in the other screen. That way you can simply click the citation you want, then click the Insert Citation icon to add it to your Word document.

**Inserting In-Text Citations as Footnotes**

To create these citations, you must first create the footnote using the tools provided within Word. Once you have created a note in Word, you can cite references in that note just like you cite them in the body of the document.

1. Place your cursor at the location in the document where you would like to insert the superscript number for the footnote then, from the References tab in the Word menu, click Insert Footnote.

2. Word will place the superscript number for you and will drop your cursor to the footnote area at the bottom of the page.

**Note:** This approach pertains mostly to Chicago’s Footnote style. In many footnoted styles, such as that of the American Chemical Society, EndNote will automatically place and subscript for you when you click Insert Citation. For these styles, skip instructions 1 and 2 above and simply insert your in-text citations as normal.
3. Click on the **EndNote X9** tab then click **Insert Citation** and, from the drop-down options, click **Insert Citation** again.

4. EndNote will open a pop-up search window. In the **Find** box, type a keyword or author name for the citation you need, then select it from EndNote’s search results. (You can also select multiple citations by clicking on the ones you want while holding down the Control key.)

5. When you are finished, click **Insert**. You can also click the drop-down arrow on the **Insert** button to exclude author’s name or year.

6. EndNote will automatically insert the citations you have selected. Note that at the bottom of your document that EndNote begins your bibliography as well. EndNote will update this bibliography as you make changes to your document.

**Deleting Citations**

To delete one in-text citation, simply highlight it in your document and click **Delete**. To delete or change multiple in-text citations, see below.

**Editing Citations**

To edit citations (for example, to add page numbers, remove the author’s name or include prefacing comments like “See also”):

1. Begin by clicking once on the in-text citation, then right-click and scroll down to **Edit Citations**.

2. From here, you can quickly exclude the author or year (or both) from your citation.

3. To make other changes, for example, to add page numbers, click on **More**. This will open the EndNote Edit and Manage Citations box.
The **Edit & Manage Citations** box will open to the location of the selected reference and houses several options including:

In the **Edit Citation** tab of the lower box, add page numbers or a prefix (such as “See also”) or suffix. To add page numbers for multiple citations, simply fill in the page number in the **Pages** box, then click the next reference in the upper window and repeat.

1. Click **Edit Reference** then **Edit Library Reference** to make changes such as spelling corrections. These changes will be updated throughout your document and the EndNote library.
2. Click **Edit Reference** then **Remove Citation** to remove a citation.
3. Click **Edit Reference** then **Insert Citation** to add another reference to a multiple in-text citation.
4. Click the **Reference** tab for a quick view of the citation information.

When you are finished making changes, click **OK**. Library references corrected in EndNote will be updated in Word the next time the document refreshes or you can manually activate the refresh process by clicking **Update Citations and Bibliography** from the EndNote X9 tab in Word.
**Turning off Instant Formatting**

If the constant updating is causing your system to hang, lock up, or is just too slow, you can turn it off.

1. From the EndNote X9 ribbon, click the **Instant Formatting is On** option then, from the dropdown menu, click **Turn Instant Formatting Off**.

2. Continue to use EndNote as usual. Your citations will now appear with tags, as in the example below. EndNote will not build your bibliography while Instant Formatting is turned off.

   *Example: I need to cite this sentence {Anderson, 2015 #171}*

3. To add page numbers while Instant Formatting is turned off, place your cursor just to the left of the closing bracket and type the @ symbol followed by the pages you wish to cite.

   *Example: I need to cite this sentence {Anderson, 2015 #171@227-229}*

4. EndNote will add the bibliography and correctly re-format your in-text citations when you turn Instant Formatting back on. To turn it back on, simply repeat the process above, toggle to **Turn Instant Formatting On**. You can also update manually while Instant Formatting is turned off by clicking **Update Citations and Bibliography**. Before doing either, though, be sure to save.

**Why is the Bibliography Single-Spaced? Finalizing the Bibliography Layout**

Cite While You Write always creates the initial bibliography at the end of the Word document as you go. To make changes to your bibliography, click the little triangle at the bottom, right-hand corner of EndNote’s **Bibliography** tab.
This will open the **Format Bibliography** box and allow you to make changes to the bibliography that will be retained each time EndNote updates your document.

Clicking on the **Layout** tab in the **EndNote X9 Configure Bibliography** pop-up box will enable you to make changes to the font, font size, bibliography title and line spacing, among others.

**The Final Copy**

Before you submit the final version of your paper, you will need to disconnect the paper from your EndNote library. This will convert your EndNote-enabled citations to simple Word formatting where your citations will function according to the same rules that govern the rest of your document.

1. Save your final draft. At the end of the process, you will have two papers, one with EndNote formatted citations and one with plain text citations. It may be useful to keep the same title for both documents but to add the words “EndNote” and “Plaintext” accordingly.

2. Next, from the EndNote X9 tab in your Word document, click on the **Convert Citations and Bibliography** list and then select **Convert to Plain Text**.

3. EndNote will give you a warning message that it is about to create a separate copy of your paper. Click **OK**.

4. In the new version, EndNote’s gray shading will no longer appear when clicking on EndNote items (indicating that it is now fully a Word document) and the unsaved name “Document1” appears at the top. Save the new document.

*What about last minute additions after you have removed your field codes?*

When you find that you have last minute edits to make after you have converted to plain text you can make those edits in the EndNote-enabled draft. Once you make those edits, save and convert to plain text again in the same way.
4. Other Useful EndNote Functions

*Importing Previously Stored PDF Documents to EndNote*

Do you have a lot of PDF files scattered about your hard drive that you would like to add to your EndNote library. You can import single PDF files or folders of PDF files and, for any files that contain DOI information, EndNote can scan the internet and attach the citation information you will need for your bibliography. It then creates a full reference including the citation information with the PDF file attached. Here’s how:

1. It may be easiest to begin by collecting all the PDFs into one folder.

2. Open your EndNote library and click on File.

3. From the drop-down menu, select Import.
   - On Mac systems, this will open your Finder.
   - On PC systems, click on either File or Folder, then, in the pop-up Import File box that follows, click Choose.

4. Navigate to the file or folder you wish to include and click on it.

5. In the Import Option drop-down box, choose PDF.

6. The Duplicates drop-down will give you options regarding duplicate files. It is recommended that you choose Import All [then use EndNote’s Find Duplicates function later (available from the References tab) to compare duplicates and be sure you’re keeping the ones you want.]

7. Click Import.

When the process is complete, your library reference will show the citation information, the attached PDF file and the paperclip icon. Imported files will appear in both the Imported References and the All References folders.
Using the Find Full Text feature

EndNote’s Find Full Text feature will search for PDF files for designated references in your library and, if it finds them, will automatically attach them to the reference. If you have exported a large batch of articles, this is a good option to try before manually downloading and attaching each article individually. Many times, EndNote will be able to find half or more of the articles for you.

First Time Setup for Find Full Text

Find Full Text will have to be configured with KU Libraries authentication information before you can use it. The image below shows the correct settings.

1. Under the Edit tab, select Preferences and click on Find Full Text.

2. In the pop-up box, apply the settings as shown in the image below. This includes:
   - Ensure that all check-boxes are checked.
   - For the OpenURL Path box type: `http://vv6tt6sy5c.search.serialssolutions.com`
   - For the Authenticate with URL box type: `http://www2.lib.ku.edu:2048/login?url=`
   - At the bottom of the box, click Apply and then OK to finish.

Using Find Full Text

Once the setup is complete, you are ready to have EndNote search for articles to attach.

1. In your library, use shift+click or control+click to highlight the references to include in the full text search.
2. From the top menu, click **References** then **Find FullText**.

3. You may be prompted to log in to the library.

4. Click **OK** to the copyright warning screen. Your search should continue automatically.

The **Find Full Text** group set in your **My Library** pane will show an ongoing progress indicator as EndNote searches for and attaches the files it finds. When it attaches a PDF to one of the references in your library, EndNote adds a paperclip icon to the left of the listing.

![Find Full Text](image)

**Setting Automatic Naming for PDFs**

PDF files often download with unusual names. In the past, it has been necessary to re-name the file when downloading it. With EndNote X9, however, you can set up automatic naming preferences to have EndNote re-name the file for you as it brings it into your EndNote library.

To set up this function:

1. From the EndNote library, click **Edit** then scroll down and select **Preferences**.

2. In the **EndNote Preferences** box, click **PDF Handling** then choose your preference from the **PDF Auto Renaming Options** on the right. When you are finished, click **OK**.

![EndNote Preferences](image)

**Exporting Bibliographies from EndNote**

EndNote can make a formatted bibliography directly from references selected from your library. This is handy if you just want to send a list of your sources to someone else or to make a printout of all or selected library contents.

1. From your full library or desired group, highlight the references that are to be included in the bibliography or click control+A to select all.
2. Next, click the **Export** icon from the upper menu.

3. In the **Export file name** box
   1) Choose a location for your bibliography from the **Save in** box.
   2) Create a name for your bibliography in the **File name** box.
   3) Choose to save the file as text or rich text (the latter is the recommended format) in the **Save as type** box.
   4) Set the **Output style** that will determine the appearance of your bibliography.
   5) Make sure the **Export Selected References** box is checked.
   6) Click **Save**. You can open the file from the location in which it was saved (Desktop in this example).
5. EndNote Sync and Shared Library Functionality

Using EndNote Sync
EndNote Web, through its “Sync” function, provides a free internet location to back up your desktop library and can even be used as a quick way to send citations to a third library. “Sync” means that it matches up the contents of both libraries, so that items added to or deleted from one library will be added to or deleted from the other as well. You also will need an EndNote Web account if you wish to use EndNote’s library sharing or group sharing functions.

The EndNote lingo gets a little tricky when we start talking a lot about desktop- and internet-based libraries though, so as you read through this guide, please keep in mind that “desktop” will always refer to the local copy of EndNote that is downloaded and installed on a home or work computer and that “web,” “internet” or “cloud” will always refer to the online version, EndNote Web, located at www.myendnoteweb.com and accessible by registration and login (not download).

The first thing to do is to set up an EndNote Web account and link it to your library.

1. Using Firefox or Internet Explorer, go to www.myendnoteweb.com

2. Log in or click on the orange Sign Up link. If you’ve set up an account in the past and forgotten the password, click on Forgot Password to create a new one. You will have to have the correct e-mail address and password associated with this EndNote Web account to set up library sharing.

3. From the EndNote desktop library, click Edit then Preferences then, from the EndNote Preferences box, select Sync.

4. In the Sync preferences, enter the e-mail and password for the EndNote Web account you used in step 2 (above).

5. Note the Sync this Endnote Library box. EndNote will sync your EndNote Web account with whatever library you currently have open regardless of what library is listed in this box. (What is listed in the box, rather is the name of the last library you synced.) If these two libraries are different, the sync process will merge the previous EndNote Web library with the contents of this new one, so be sure you have the correct library open and active. The name of the open library is listed at the top, center of the EndNote window.

6. Uncheck the box that says Sync Automatically. Then click Apply followed by OK.
Now that your EndNote library is linked with your EndNote Web account, you will sync the two libraries together.

1. Be sure you are in the correct library in EndNote desktop, then click the blue Sync button.

   ![EndNote Library](image1)

   ![Warning Dialog](image2)

   Note that if you are switching libraries, you may get a warning about merging different libraries. If you are setting up a different library than one used for sync previously, EndNote will give you a warning message. This warning simply lets you know that you are about to add this new library to a previous library. You can ignore the warning and proceed from here if this is a change you wish to make. Choose OK to continue or Cancel to back out.

2. You may be prompted to fill out additional registration information. This will only happen the first time you sync a library.

3. At the bottom of the registration, agree to the terms and in the next screen, click Sync.

4. You will then be prompted to create a compressed backup of your library. If you choose “Yes,” EndNote will create the backup and then sync your library. If you choose “No,” EndNote will skip the backup and go straight to the sync process. If you’re just now getting set up, it is probably okay to select No and skip this extra step.

5. When the Sync process is complete, you should see that both the EndNote Web and the EndNote desktop libraries have been matched to one another. Items that you may have placed in the trash on the EndNote Web account will appear in the trash in the EndNote desktop account. Groups that you have created in either place will appear in the other. If you don’t immediately see the updates in EndNote Web, click All My References to refresh the page (or Control + F5).
To synchronize across more than one computer

If you’re created a library at work that you would like to use on your home computer too, you can use EndNote Web sync so that changes made at work will bounce up to EndNote Web, which you can then pull back down to appear in your home library (and vice versa). Begin by following the instructions above to set up and sync your first desktop and web libraries. When this is done, you’ll be ready to add a second desktop library.

Before you begin, be sure that you have the EndNote program installed on the second computer and that you have synced, at least once, the original desktop and Web libraries. For the sake of clarity, we will call these first two libraries “Work Library” (desktop) and “Web Library” (internet) and will add a third “Home Library” (illustrated above, although they can be in any location you like, of course.)

1. To begin creating the Home Library, open your EndNote desktop program on your home computer (not the online version).

2. From the EndNote menu bar, click File and then New. This will open a new, empty library (to which we will download the contents of your Web Library).

3. Give the new library a name. It might be useful to give it a name similar to its Work Library counterpart.

4. From the Home Library menu bar, click Edit and then Preferences.

5. In the EndNote Preferences box, choose Sync from the list of options on the left side of the box.

6. In the EndNote Account Credentials box, type in the e-mail address and password that you used to set up your EndNote Web account.

7. Check or uncheck the Sync Automatically box, as you choose, then click Apply and then OK.

8. Next, click the Sync icon just as you did to synchronize your original Work Library and Web Library. Near the bottom, right hand corner of your Home Library, you will see a status bar appear as the sync process pulls down citations from your Web Library to populate your Home Library.

9. Once both libraries are in place, you simply need to be sure to click the Sync button whenever you make changes in either the Home Library or the Work Library. This will “save” your changes to the Web Library. To bring the most recent updates into either the home or work library from the Web Library, click Sync when you begin your work.
Sharing Libraries
You can now share full read/write access to an EndNote library with up to 14 other users. In EndNote X8, you will be able to share a library with up to 100 users. Whether you intend to share your library or not, this setup will get you ready for library sharing and will also back up your own library to EndNote’s cloud.

Receiving a shared library
If someone shares a library with you, you will receive an e-mail notice. To open the library:

1. Click the blue Accept button in your email to accept or close the e-mail to ignore. You will be prompted to log in to EndNote Web to complete the process. Remember, however, that the shared library will not appear in the cloud version of EndNote but rather will operate from within your desktop version.

2. From the EndNote Desktop library, click File then Open Shared Library. This is how you will always open the shared library. It will not save to your computer because it is fluid and others may be adding to it, so this process will always provide you with the most recent version of the library.

3. The shared library will open as a separate EndNote library. Larger libraries may take some time to upload. You can watch the progress at the bottom of the middle pane.

(Optional) If you want to some or all of the citations that appear in the shared library, you can easily copy and paste them to your own private library. In the shared library, use Control+A to select all (or Control+click to select individual citations) then Control+C to copy. Next, in your own library, click anywhere in the middle pane (the library listings pane), right-click, and select Paste.

To switch back and forth between the two libraries, click Window then select the name of the library you wish to access. If you are working with more than one EndNote library (such as a shared library and your own, individual library), it is important to remember which library is associated with which document and to have the correct library open in the background. You can set EndNote up to prompt you for the correct library each time. To do this:
1. From your EndNote library, click **Edit** then **Preferences**.
2. In the EndNote Preferences box, select **Libraries** from the list on the left.
3. For the **When EndNote starts** drop-down, select the setting, **Prompt to select a library**.
4. Click **Apply** then **OK**.

If this is a once-and-done library—just someone sending you their citations—then it will be easiest, for your own writing purposes, to go ahead and add the citations to your personal library. If you are collaborating with a group on a project that is fluid, however, meaning that the document could change or new references could be added or subtracted from the shared library, you will want to instead use the “shared” library each time, meaning that each time you want to work on the collaborative document, you click **Open Shared Library** and re-download it rather than working from a stored copy on your own computer. Each Word document with EndNote citations will expect to pull from only one EndNote library, therefore, if several collaborators add citations from their own stored libraries, rather than from the group’s shared library, there will be havoc in the document.

**Sharing a library with others**

Are you the keeper of the shared library? You are going to create a regular EndNote library and then share it with others. While your invited library members will open the library using **File** then **Open Shared Library**, you will open the library from your Documents folder, just like you would any other EndNote library. There are no special markings or flags that will denote this as a shared library so from the outset, you may want to give your shared library a special name (like “Shared...”) so that you can remember it easily. Once you’re got your library ready to share:

1. From the EndNote Desktop library, click the **Share** icon. (If this icon is unavailable, check back through the previous syncing libraries steps above to ensure that you have linked the correct libraries together.
2. The EN Sharing dialog box will open. In the **Invite More People** section of this box (see first image on next page), type in e-mail addresses for up to 14 colleagues with whom you plan to share the library, then click **Invite**.

*Note also the gear icon located to the far right of the list of sharers (highlighted here in yellow). You can return to the Sharing dialog box and use this icon to remind someone to accept your invitation or to remove a sharer from the library. If you remove someone from your library, they will receive an e-mail notification that reads: “(Your Name) has removed you from accessing their EndNote library. If you think this was a mistake, please contact (Your Name) directly.”*
3. Your recipients will receive an e-mail (shown on page 35) notifying them that you want to share this library and informing them that they will have access to “all of the references, PDFs, file attachments, and notes in this shared library” in their own EndNote desktop library.

4. If someone seems to have forgotten to accept your shared library, you can send a reminder by clicking on the Shared Library icon, then clicking the gear in the right-hand column. You can also remove members here as well.

**Backing up the shared library**

In EndNote X9, there is no way to set specific permissions (read, write, edit, delete, or administer rights) for individual members. Everyone has full access to the library and can add to it or delete from it. This means that as the keeper of the library, you will want to back it up frequently. To back up the library:

From the EndNote library click **File** then **Save a Copy**. This should place a version with the added filename “Copy” in your Documents folder. You may want to devise a system for naming and dating the backed up versions.

**Shared libraries and non-shared libraries work in the same way.** The instructions below for adding, organizing, editing and removing citations and attachments, as well as using EndNote within Microsoft Word, will work for either type of library.
6. For More Information

The libraries offer several tip sheets and how-to guides for additional EndNote topics. These can be accessed online at http://guides.lib.ku.edu/citation/EndNote. Topics include:

EndNote:
- Editing your output style
- Getting new output styles
- Working with journal abbreviations
- Modifying a reference type
- Copying and re-using references
- Getting and installing EndNote filters
- Importing to EndNote using text tags
- Using the Traveling Library and other features for collaboration
- Using HawkDrive and Dropbox with EndNote
- Using EndNote with SumNotes
- Converting citations from Excel to EndNote
- Using EndNote Web
- Sharing and collaborating with EndNote

You are also welcome to directly contact KU EndNote support at EndNote@ku.edu.

KU Information Services
Information Services provides consulting and Q&A help in a variety of ways: By phone at (785) 864-8080 or by e-mail at questions@ku.edu.

To learn more about or register for workshops, receive automatic announcements of upcoming workshops, and track workshops you've registered for and have attended, visit the http://apps.ku.edu/~infotrain/calendar.php.

For further workshop related questions, please email training@ku.edu.

EndNote.com
www.endnote.com is the place to find updated versions of connection files, import filters, output styles, and the EndNote program itself. Tip sheets, a technical support database, and utility programs for repairing damaged EndNote Libraries and converting from other bibliography management tools to EndNote are also available from the Support & Services area of this site.

For information specific to EndNote Web, visit www.endnote.com/support/faqs.