

## Introduction to EndNote X7 for Windows

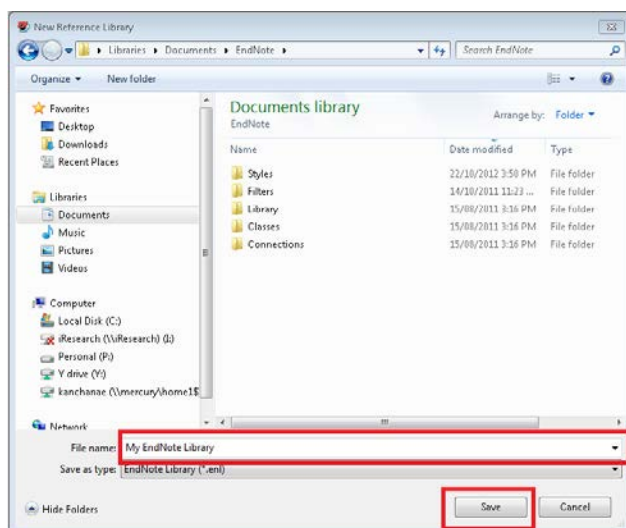
This workshop introduces the basics of using the EndNote software with Windows.

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### Create an EndNote Library

1. Open EndNote - The first time you open EndNote, you may be asked whether you want to integrate with EndNote Web > select **Cancel**.
2. A screen appears with 3 options: Learn about EndNote; create a new Library; Open an existing Library.
3. Click on **Create a new Library**.
4. Give your Library a name.



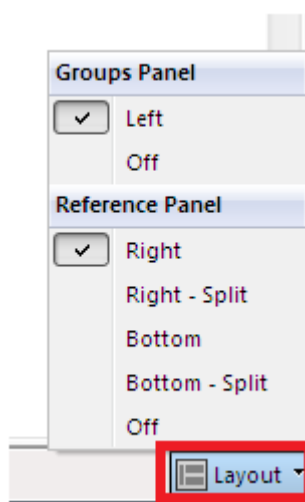
5. Click on **Save** to save it to your computer. If you plan to use more than one computer, it is important that you save your library on a flash drive.
6. This is your personal Library in which you save your references.
7. The new library appears as an empty EndNote library.

### Create additional EndNote libraries

1. Go to **File > New**.
2. Give your Library a name and save it.

### How to move/adjust the preview window

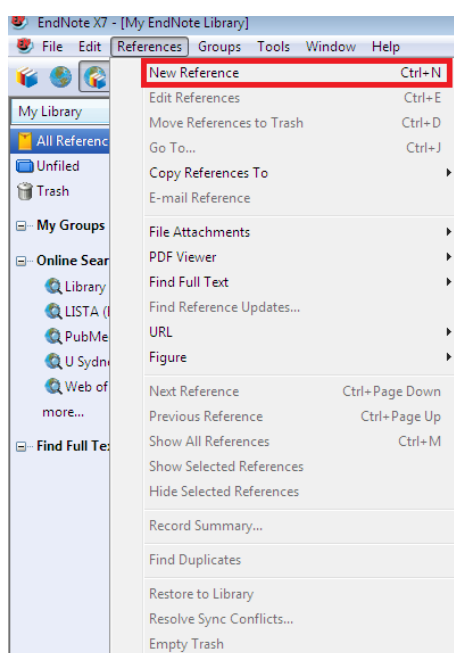
1. Click the Layout button in the lower right-hand corner of the Library window.



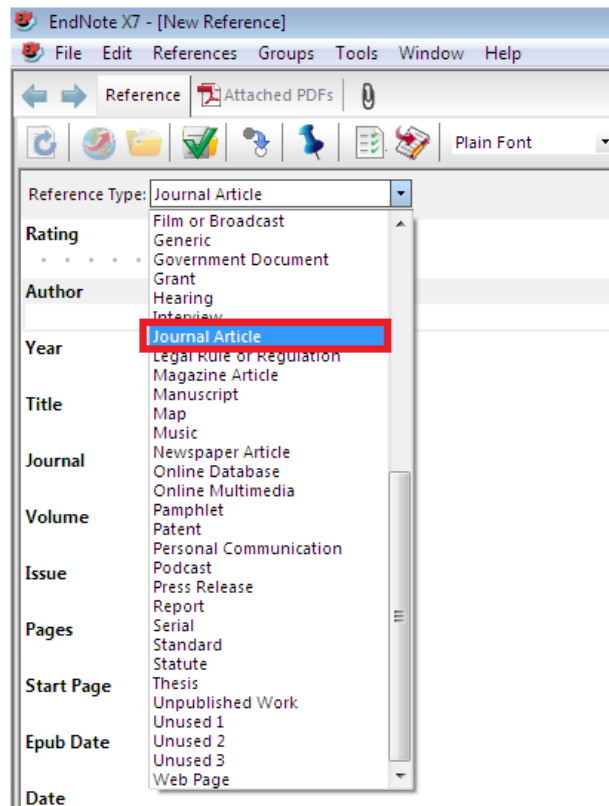
2. Choose your preferable option from reference panel list to display reference/Preview tabs and the PDF Viewer tab.

### Add references manually to the Library

1. From the toolbar select **References > New Reference**



- The template defaults to a Journal Article reference. Use the **Reference Type** drop-down menu at the top of the screen to change the selection (e.g. Book, Web Page)



- Use the fields displayed to enter the information required (you don't need to fill them all out, just the ones you need for citation in your chosen style)
- Enter Author as **Surname (comma) initial (full stop)** – if there is more than one Author, enter the name of additional authors on a new line. If the author is an organisation enter a comma after the name (e.g. World Health Organization.).
- Use capitalisation as recommended by the bibliographic style you are using.
- Once finished entering information, select **File > Save**.
- Select **File > Close Reference** to return to your Library.
- Your reference will be previewed in the panel at the bottom of the screen. Use the drop down menu at the top left of the screen to change the bibliographic output style.

## Direct export from a database

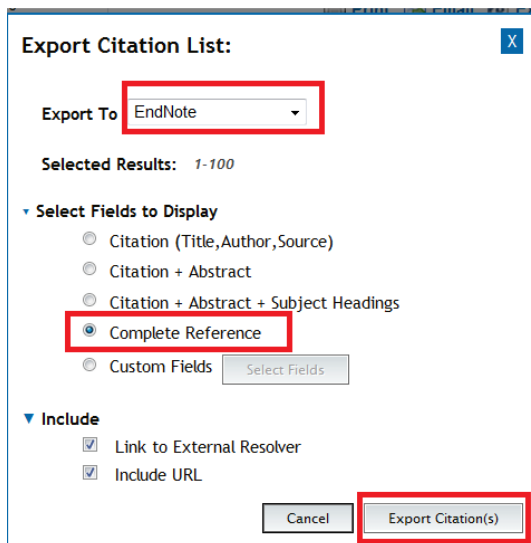
There is a list of major databases and brief instructions on how to export into EndNote from them through the **EndNote subject guide**, (<http://libguides.library.usyd.edu.au/endnote>) under **Using Databases**.

### *Example: Direct export from OvidSP databases (eg. Medline, ERIC, PsycInfo)*

- Leave your EndNote Library open.
- Open internet Explorer and go to: [www.sydney.edu.au/Library](http://www.sydney.edu.au/Library)
- Click on **Databases and Electronic Resources**.
- Click on the letter that corresponds to the name of your chosen OvidSP database from the alphabetical list (eg. **Medline, ERIC, PsycInfo** etc.).
- Scroll down the list of databases until you find your database and click on the title to open it.
- Search the database on your topic of interest.
- Select citations from the first page of hits to add to your EndNote Library.
- Click on the **Export** link.



9. In the **Export To** drop-down menu select **EndNote**.
10. Under Select Fields to Display select the **Complete Reference** and Click on **Export Citations**.



**Export Citation List:**

Export To: EndNote

Selected Results: 1-100

**Select Fields to Display**

- Citation (Title, Author, Source)
- Citation + Abstract
- Citation + Abstract + Subject Headings
- Complete Reference
- Custom Fields

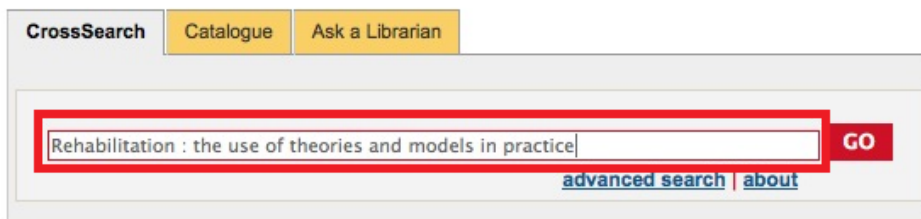
**Include**

- Link to External Resolver
- Include URL

11. The records will be exported directly into your EndNote library.
12. You will see only the last group of references that you have exported in the main window. See all references in your Library click on the **All References** group

## Export References from Library Catalogue

1. Leave your EndNote Library open.
2. Open Internet Explorer and go to: [www.sydney.edu.au/Library](http://www.sydney.edu.au/Library)
3. Search for the item that you want to export from the CrossSearch tab on the Library Homepage.



CrossSearch Catalogue Ask a Librarian

Rehabilitation : the use of theories and models in practice

[advanced search](#) | [about](#)

4. Your search results will be displayed
5. Click on the **folder icon** to save the item

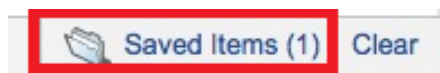
### Rehabilitation: the use of theories and models in practice.



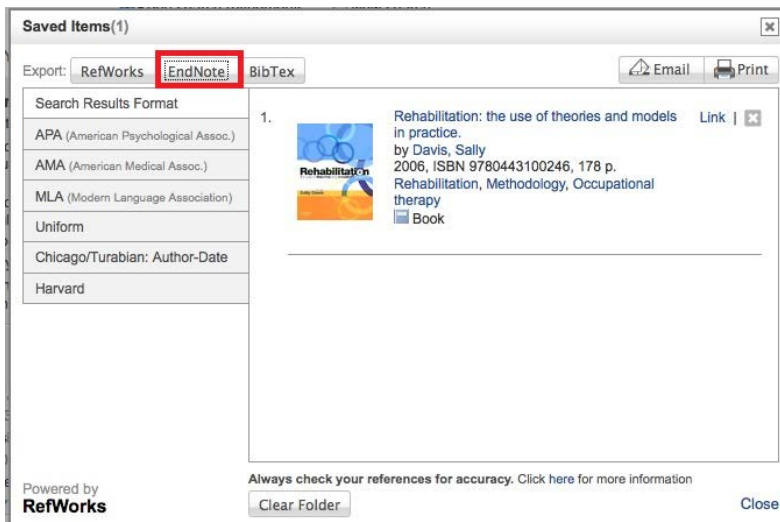
by Davis, Sally  
2006, ISBN 9780443100246, 178 p.  
Rehabilitation, Methodology, Occupational therapy  
 Book: Available, Health Sciences, 617.106 REH



- Click on the **Saved Items folder** at the bottom of the window

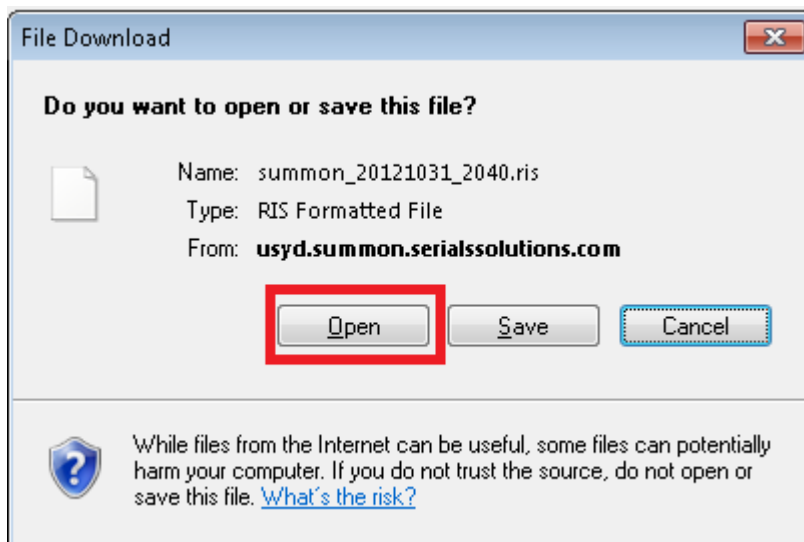


- Click on **EndNote tab**.

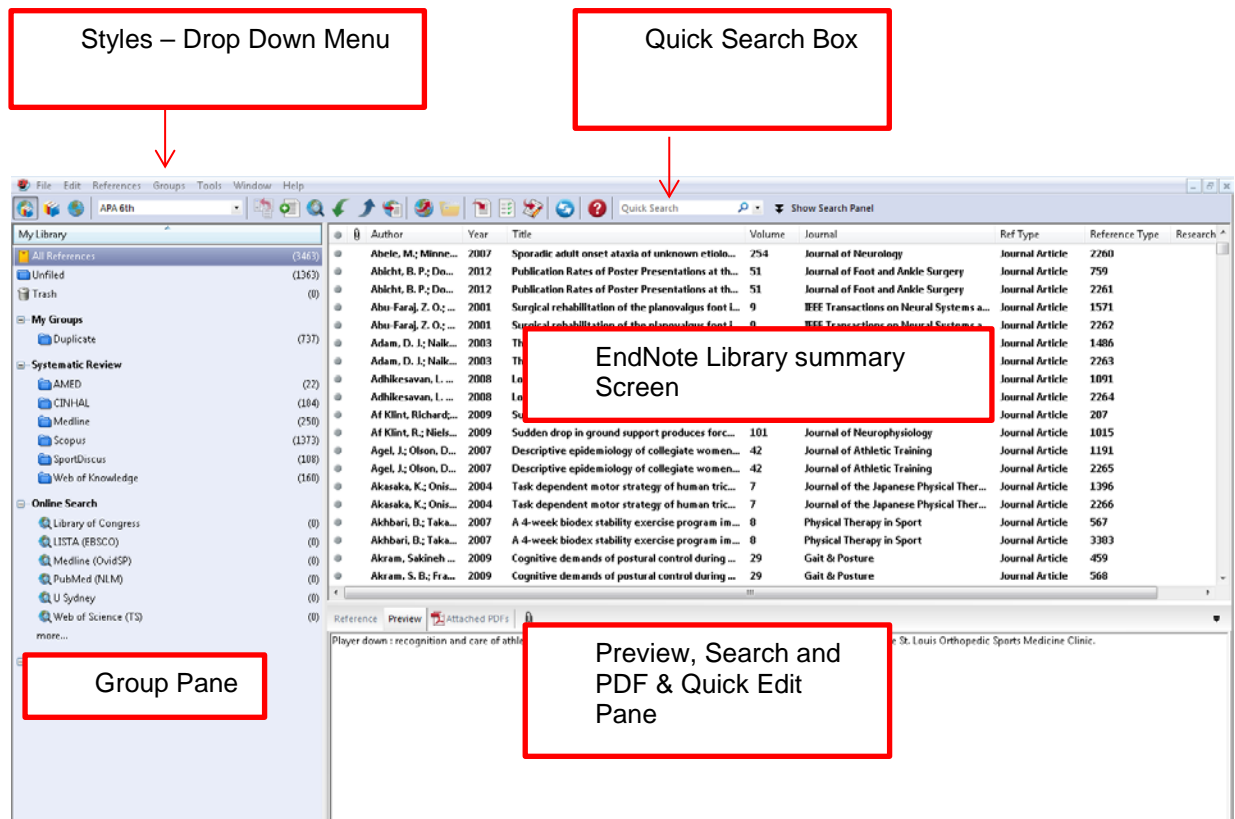


- Click on **Open** to import the record(s) into your **EndNote** library.

- Your selected references will appear in EndNote.



Once you add your references to your EndNote library it will look like this.

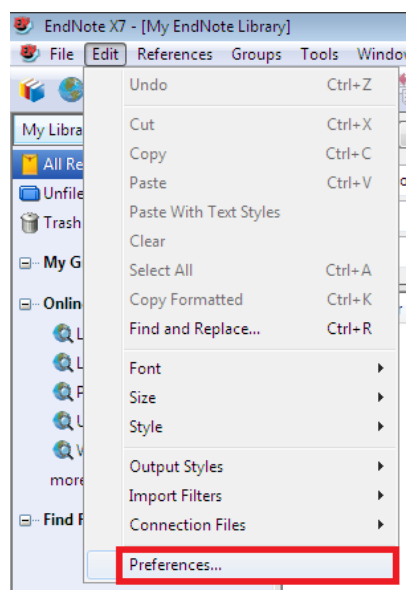


## Find full text and attach it to your citations

### Setting up the Find Full Text Function

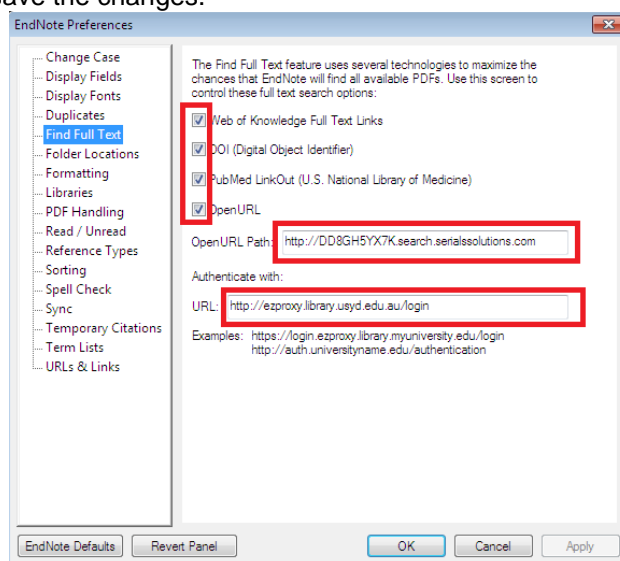
EndNote can locate and attach full text articles to some citations that are already in your Library. You will need to set up the **Find Full Text** function before your search.

1. Click on **Edit** and select **Preferences**.



2. Select **Find Full Text** from the left hand side list.

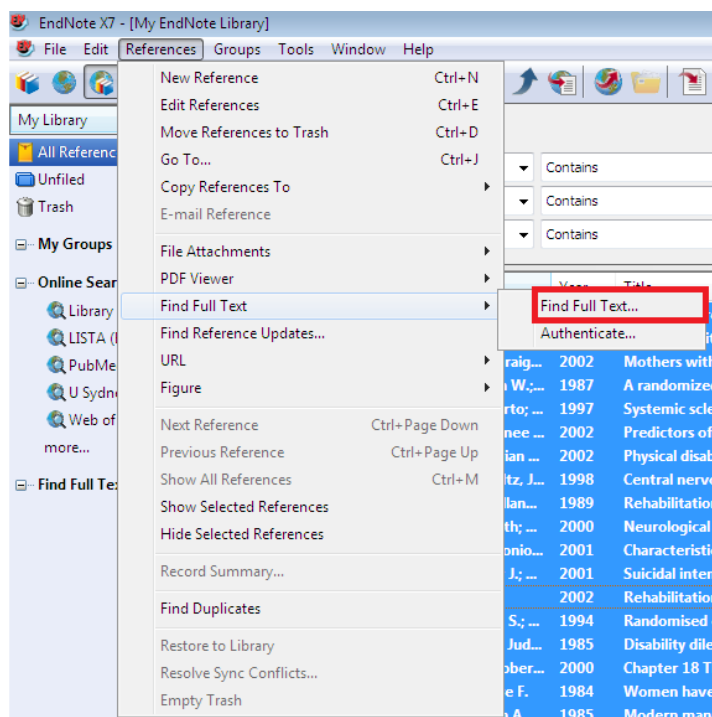
3. Tick the four boxes and copy and paste following information.
  - OpenURL Path : <http://DD8GH5YX7K.search.serialssolutions.com>
  - Authenticate with URL : <http://ezproxy.library.usyd.edu.au/login>
4. Then click on **Apply** to save the changes.



### Finding Full Text

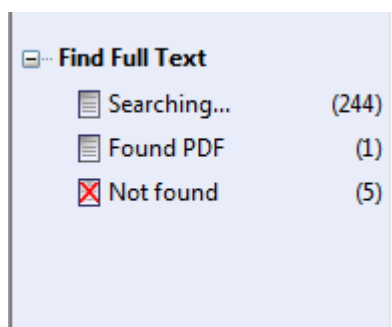
1. In the main Library window, highlight references that you wish to locate the full text for (Click on Ctrl and A to highlight all)
2. From the toolbar select **References > Find Full Text > Find Full Text**. Or Click on Find Full Text

Icon



3. Login to eResources using your Unikey and password or library borrower number and name. Once you login click the **Continue** button appearing on the surrounding window.
4. Check the Copyright notice (see <http://sydney.edu.au/Library/about/policies/copyright/> for assistance) and click **Continue** to proceed
5. EndNote will search for full text for the selected references.

- A temporary Find Full Text Group will appear on the left pane. It remains for the current session, but disappears when you close the Library.



- If EndNote is able to locate the full text, it will be attached to your reference, and you will see a **paper clip** icon next to the reference in the attachments column.

**Note:** Full text may not be automatically retrieved. This can be due to your subject area, network speed, firewalls etc. If full text is not attached you can manually attach the full text using the steps below:

### **Attach Full Text Manually**

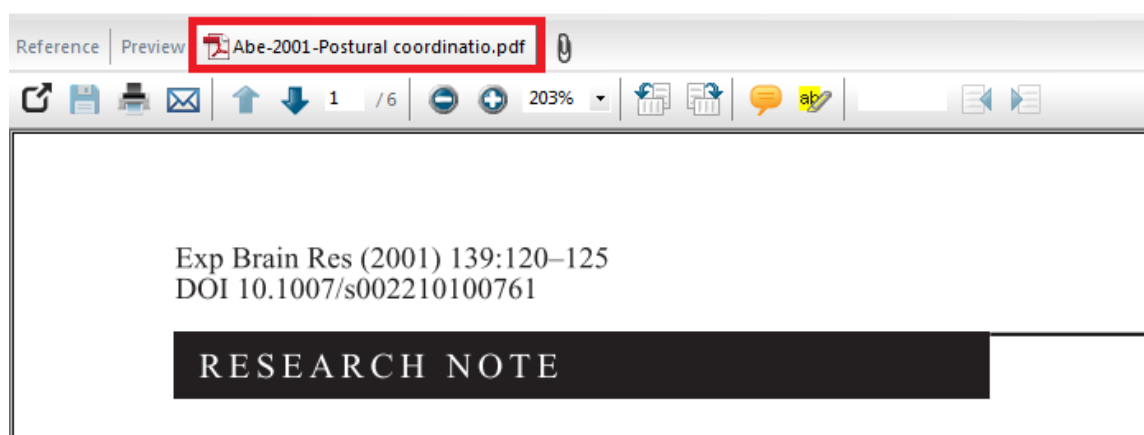
- Make sure that you have downloaded the full text file onto your computer or USB
- Select the reference you would like to attach the PDF document
- Click on the “**Paper Clip**” icon on the **Quick Edit Pane** OR From the top toolbar select **References > File Attachments > Attach File**



- Browse to the PDF file you saved on your hard drive or USB, and select the article and click on **Open**
- The file will appear in the **File Attachments** field of the reference.


### **View PDF Attachments**

- Ensure that you have the **Reference Panel** displayed in Layout (see **How to move/adjust the preview window**)
- Highlight the reference in the main EndNote window.
- Click on the **PDF** tab located in the preview pane. The PDF should display below this tab.



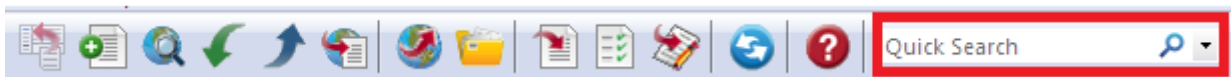


OR

1. To view the full text, double click on the reference to open it and scroll down to the **File Attachments** field. Double click on the file icon to open it.
2. To open the PDF in a reference window click on **Open PDF** icon  from the main library window.

## Search the library (quick search)

Use **Quick Search** option on the main toolbar to search your EndNote library with keyword or multi-phrase. This will search all the fields in your library, attached PDF document and PDF notes.

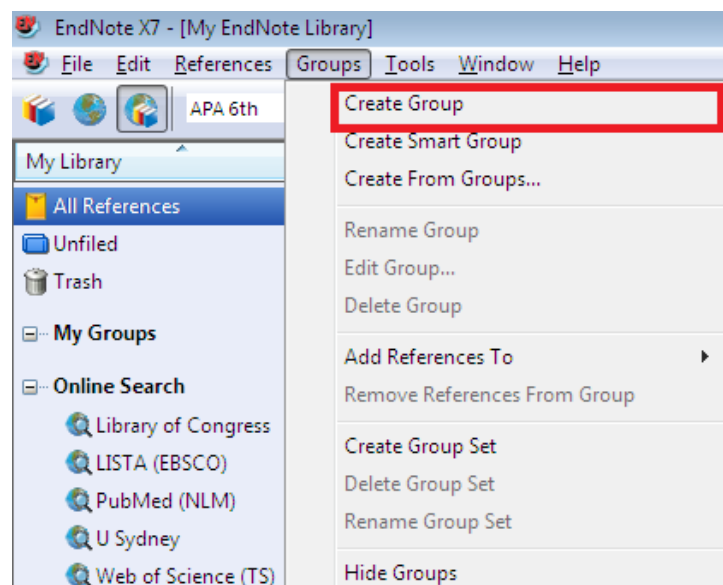


## Manage references using Groups

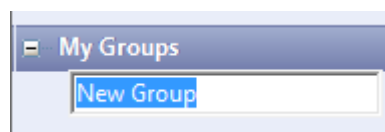
The left pane of the Library window lists all of the Groups in the current Library

### Custom Groups

1. Use Custom Groups to group references together (it may be for an assignment, a topic etc)
2. From the toolbar select **Groups** and click on **Create Group**



3. Enter a name for the **Group**



OR

1. Click on **My Group** and right click on the mouse, select **Create group** then enter a name of the **Group**.

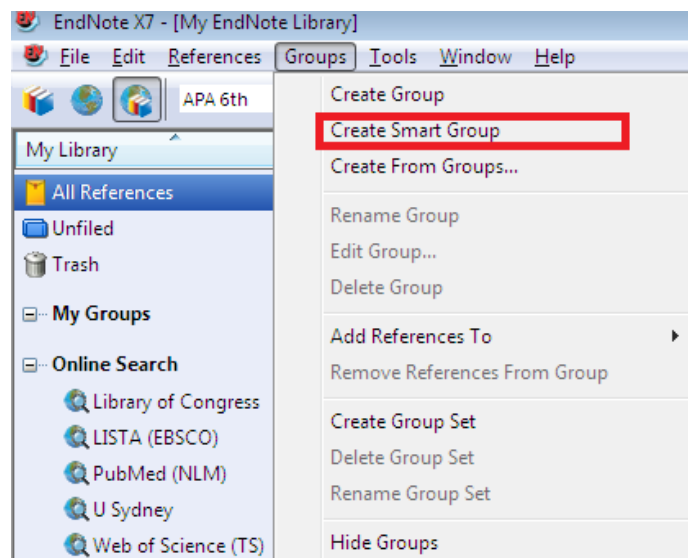
4. Click on **All References** at the top of the Groups pane to view all references in your Library.
5. Highlight references you wish to add to the Group in the main window.
6. From the **Groups** menu at the top of the page, select **Add References to...** and choose your Group name from the list.

OR

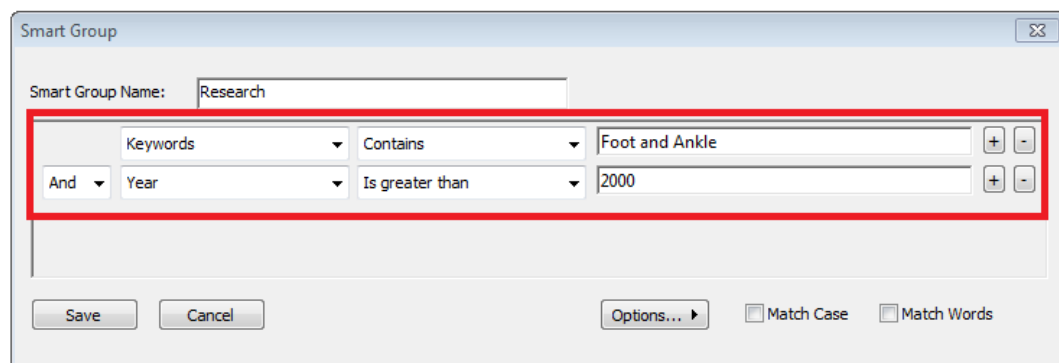
7. Highlight references you wish to add to the Group in the main window.
8. Drag and drop to the right group.

### Smart Groups

1. Use Smart Groups to automatically add references to a Group if they match a specific criteria (all articles by a particular author or articles containing a certain keyword etc)
2. From the toolbar select **Groups** and select **Create Smart Group**



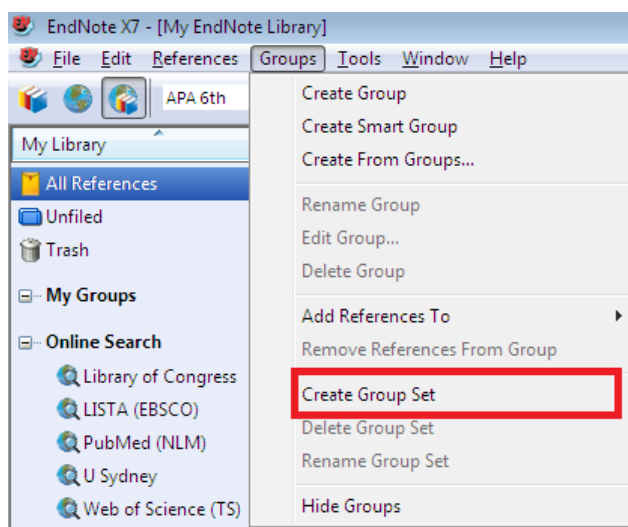
3. A search box appears. Give the Group a name in the **Smart Group Name** box
4. Enter criteria for your search (e.g. Year is greater than 2006).



5. Click **Save**
6. A new Group will appear under **My Groups** on the left of the page
7. As you add more references to your Library, references meeting the search criteria will be automatically added to your Smart Group.

## Groups Sets

1. Create Group sets to organise your groups into sets.
2. From the toolbar select **Groups > Create Group Set**

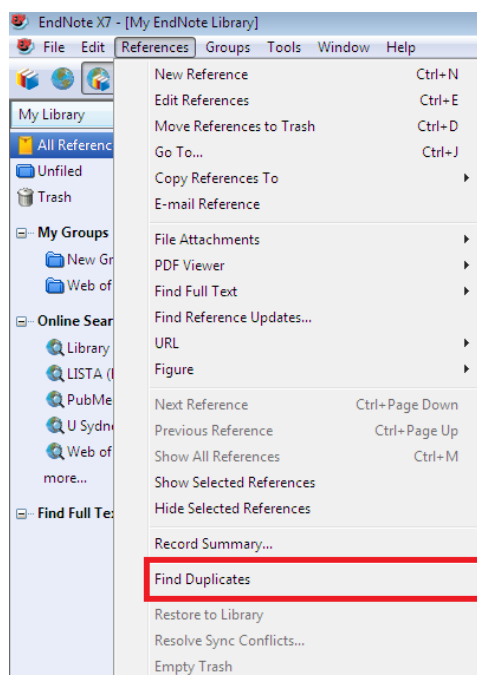


3. Enter the name of the **Group Set**
4. You can add **sub groups** under Group Sets using the instructions for **Create Group**.

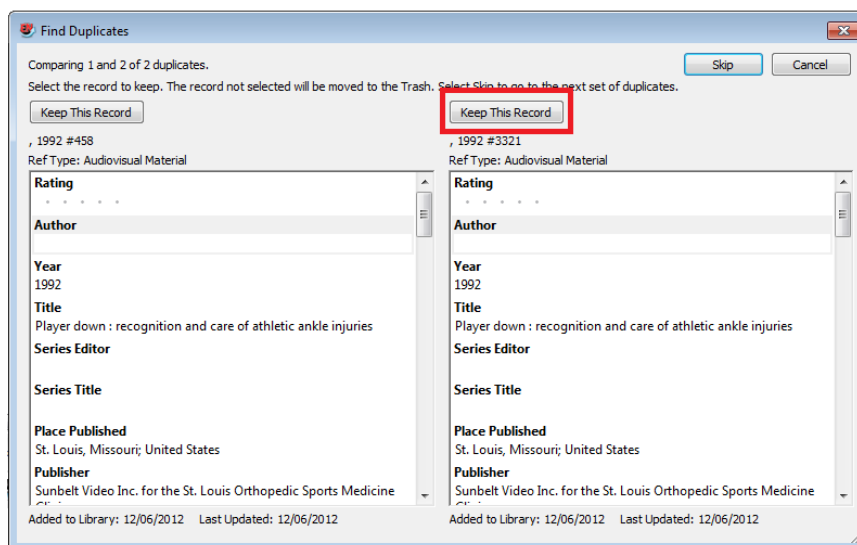
## Find and Remove Duplicate References in your EndNote Library

The **Find Duplicates** window highlights fields that contain non-matching text so you can quickly compare the records.

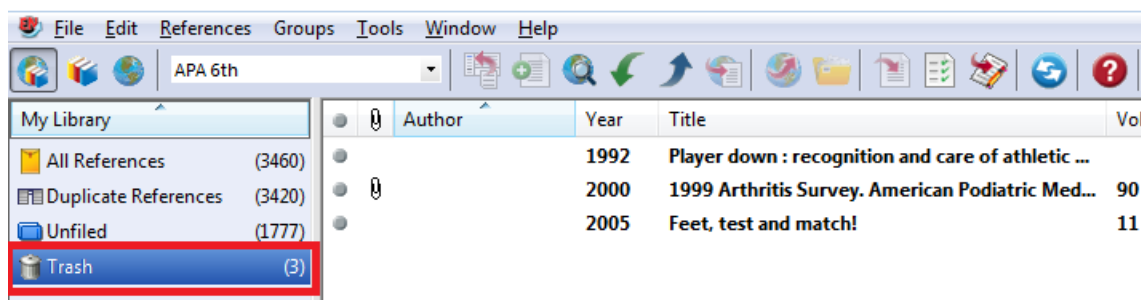
1. Select **References > Find Duplicates**



2. The **Find Duplicates** window will appear (see below picture).
3. Compare each set of duplicate references.
4. Select **Keep This Record** to keep one of the duplicate references or select **Skip** to keep both references.



5. On completion of finding duplicates, go to the **Trash** under **My Library** in the left pane.
6. Right click to empty trash and remove the duplicate references from your Library.



## Backup, Compress and/or email your EndNote Library

### **Backup EndNote**

Backing up your Library is essential if you are working on an important project or upgrading to a new version of EndNote.

1. Select **File > Save a Copy**
2. Save the backup copy to a different drive - this will help ensure that you can use the backup if your main Library gets corrupted or your computer breaks
3. Leave **'Copy'** or type **'Backup'** on the end of the file name so you tell is apart from your main Library

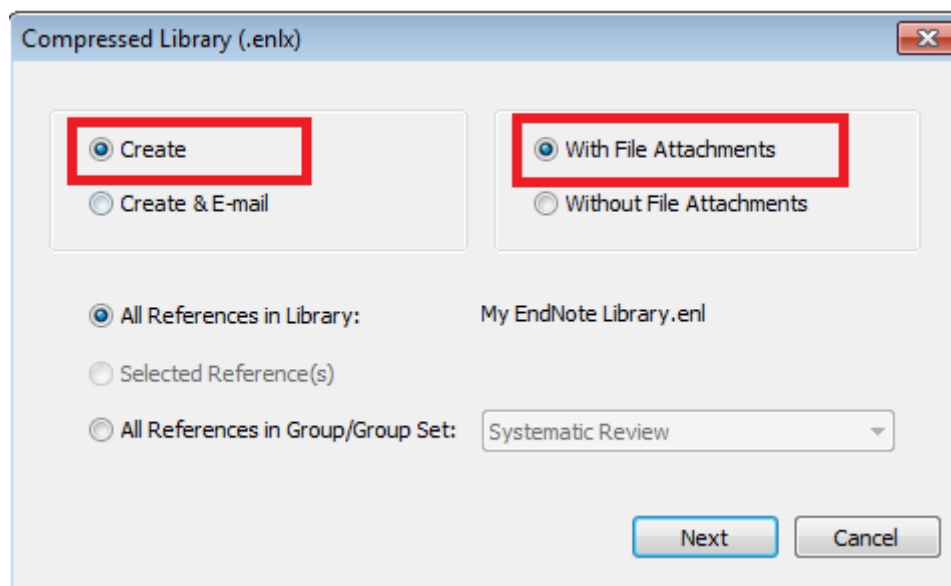
### **Maintaining backups**

Periodically (or after every new addition if desired) create a new backup copy then delete the old back up copy or date each backup.

### **Compress and save/email a library**

You can compress your library to save your complete library (the filename.enl file and associated .DATA folder) to a single compressed filename.enlx file for easily back or to send a copy to a colleague.

1. Select **File > Compressed Library (.enlx)**
2. Select **Create** and **With File Attachments** then click on **OK**.



## Set up EndNote to synchronize between EndNote and EndNote web

You can link desktop Endnote with your EndNote Web account so that you can transfer references between EndNote desktop and EndNote web. EndNote web accounts are free for University of Sydney students and staff.

### Sign up for a free account

- **On campus:** Go to <https://www.myendnoteweb.com/EndNoteWeb.html> and click on Sign Up, then follow the prompts.
- **Off-campus:** From the Library's databases pages enter <http://sydney.edu.au/library/databases/dbtitlew.html> click on **Web of Knowledge**. Select My EndNote Web at the top of the page and click on **Register**.

You may need to activate your existing EndNote Web account the first time you use EndNoteX6 to transfer references.

### Previous users of Endnote Web with desktop Endnote

The transfer of references between desktop Endnote X7 and Endnote Web works differently to how it worked in the past. It is no longer possible to maintain different collections of references in desktop and Web libraries.

### Important information for all users

Synchronizing your Libraries is designed to mirror the content in desktop and Web Libraries. For this reason references can be lost if synchronising not done correctly.

To avoid losing references or Groups from either Library it is important that you do the following **before** synchronizing your Libraries:

- Make a backup copy of your desktop Endnote Library

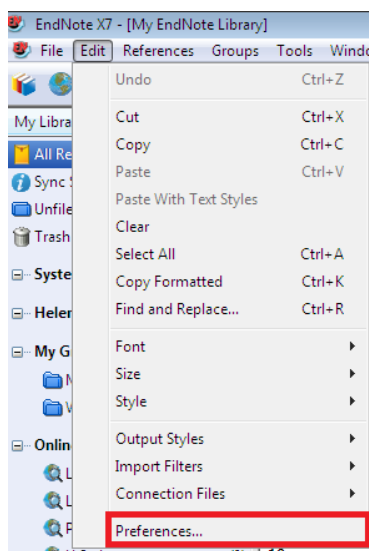
- Rename any Groups that have the same name in both Web and desktop Libraries (before Synchronizing for the first time)
- Advanced users should watch the video below and follow all the recommended steps to make sure no references or Groups are lost when synchronizing with X6 for the first time
- If you plan to synchronize your Library on a second computer please watch the video below for steps on how to do this
- Do not make a change to **both** your desktop and Web libraries before Synchronizing

It is very important that you watch this video before Synchronizing for the first time: <http://youtu.be/xjsJaKRp3s4>

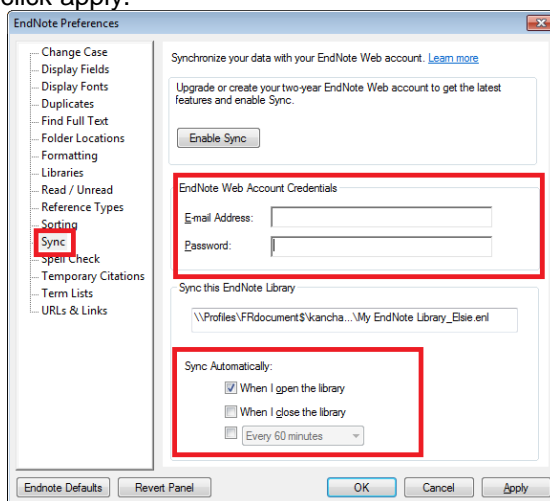
### Other points about synchronization

- Smart Groups, Combined Groups and Group sets will not be synchronized
- Deleting references or custom Groups in either your desktop or Web library after your first sync will delete them in **both** libraries

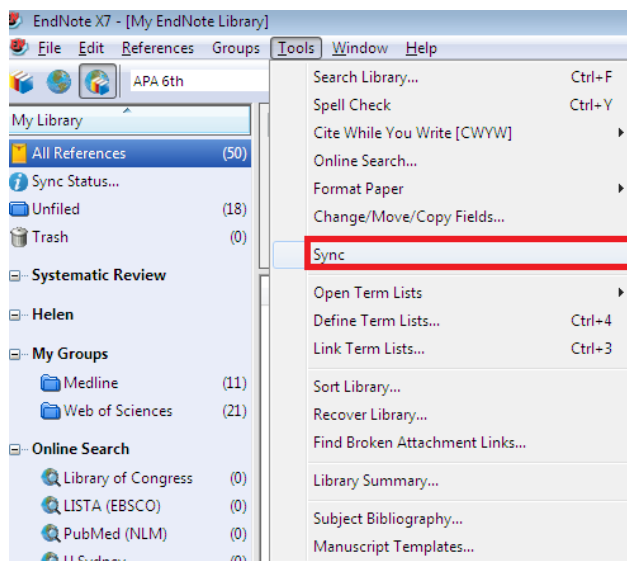
#### 1. Select **Edit > Preferences**



2. Select **Sync**
3. Add your **Account Details** (Email address and Password)
4. Select the Sync option and click apply.



5. Select **Tools>Sync** or click on **sync icon**  to transfer references from Desktop Endnote to EndNote Web.



### For further information

University of Sydney Library's EndNote guide: <http://libguides.library.usyd.edu.au/endnote>

Contact your Faculty Liaison Librarian: <http://www.library.usyd.edu.au/contacts/subjectcontacts.html>

EndNote user knowledge base: <http://endnote.com/support/search-knowledgebase>