

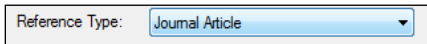
Introduction to EndNote X4

- EndNote is designed to help researchers organize their references and create bibliographies
- UT Libraries does not provide access to the software
 - available at the [Campus Computer Store](#) at an educational price (\$79)
 - or download a free 30-day trial at www.endnote.com
- We do not endorse one product over another.
 - [EndNote Web](#) is an online service www.endnoteweb.com free for UT students & faculty.
 - [Zotero](#) is free web-based tool to collect, manage and cite your sources.

Open a new library

1. From the File Menu, select **New**
2. Browse to the location where you want to save the library [for today select **Desktop**]
3. Enter an appropriate file name and click on **Save**.
Your EndNote library consists of two parts: filename.enl and filename.data (a folder). Both parts are required for a complete EndNote library

Add references to your library

1. From the References Menu select **New Reference** or click 
2. Select the appropriate **Reference Type** (40 available) 
3. Fill in the template (Endnote adds the necessary punctuation)
 - Multiple authors go on separate lines. For best performance of autocomplete use the surname first format: i.e. **Dewey, Melvil**
 - Press **TAB** to go to the next field
 - For corporate or institutional authors put a comma at the end of the author, i.e. **Department of the Interior, or City of Austin. Office of the Mayor,**
 - Enter volume or issue numbers as a simple number: **6** not v.6
 - **Keywords** store terms that you want to associate with the reference. Multiple keywords are separated with a semicolon(;), backslash (\) or **ENTER**
 - **Notes** or **Research Notes** are fields you can use any way you'd like (i.e. comments about the article)
 - **Red text** indicates the autocomplete function for specific fields
4. To close a reference click the X close button, or from the File Menu select **Close Reference**
5. The **Preview** Pane (at bottom) displays a selected reference in selected bibliographic style.

To choose a different bibliographic style:

- Click on the drop down menu on the top left of the screen 
- Click **Select another Style** & browse for an appropriate style by journal or discipline
- Highlight the style name and click **Choose**

Export References from EBSCO Databases to EndNote

1. Use **Internet Explorer** or **Firefox**. Mac users must use **Firefox**.
2. Go to the library home page www.lib.utexas.edu
3. Click on **Research Tools > Find Articles using Databases > Academic Search Complete**
4. Do a search and select articles you want to export by clicking on  [Add to folder](#)
5. Click on **Folder** at the top of the screen or click on the **Folder View** on the right sidebar
6. To select all citations click the box next to **Select/deselect all**
7. Click the **Export** icon 
8. Click on the button next to **Direct Export to EndNote, ProCite, or Reference Manager**
9. Click the **Save** button
10. The citations are added to your Endnote Library
11. To see all your references click **All References** on the left sidebar

Export References from Google Scholar to EndNote

1. Go to Google Scholar <http://scholar.google.com>
2. Click on the **Scholar Preferences** link (on the right of the Scholar search box)
3. Scroll to down to **Bibliography Manager** section
4. Click the radio button next to **Show link to import citations into** and choose **EndNote**
5. Click the **Save Preferences** button.
6. When you search Google Scholar you will see **Import into EndNote** as an option under each citation. Click on **Import into Endnote** > Click **Open** > Click **Allow** (if you get an popup from Internet Explorer Security)

Export References from Web of Science to EndNote

1. Use **Internet Explorer** or **Firefox**. Mac users must use **Firefox**.
2. Go to the library home page www.lib.utexas.edu
3. Click on **Research Tools > Find Articles using Databases > Web of Science**
4. Mark the records you want to export
5. Click on the **Save to Endnote, RefMan, Procite** button
6. Click the **Export** button
7. Click on **Allow** if you get a popup window
8. The citations are added to your Endnote Library
9. To see all your references click **All References** on the left sidebar

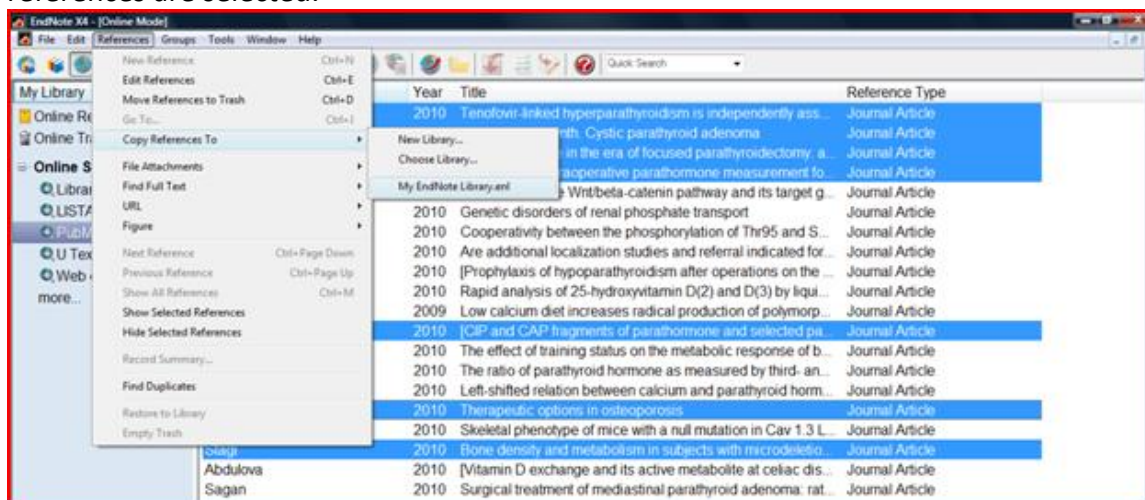
****Some imports may not be 100% accurate; review the records and make any manual fixes****

Online Search

Before using the Online Search features, we recommend that you switch your EndNote Library mode to Online Search Mode.

1. Click on the Online Search Mode icon 
2. Note that the Groups Pane at the left no longer shows your Groups or your References.
3. Your Online Search Results will go to a temporary library. You can copy references of interest from your search results to your EndNote Library
4. In the Groups pane (left) under **Online Search** select the database that you would like to search.
5. A search window is created in the Tab pane showing your online search connection.

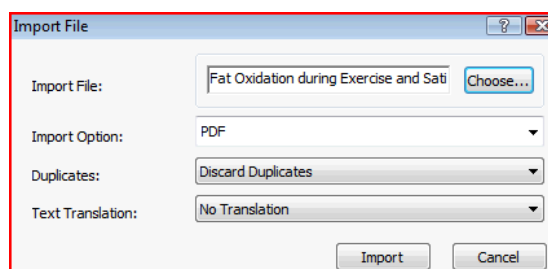
6. Enter your search request into EndNote's Search window and click **Search**.
7. EndNote searches the database and displays the number of references that were found to match your search criteria > click **OK** to retrieve the references. You can change the numbers to take only some of the results.
8. The references are downloaded into a temporary library.
9. Review the references and select any that you want to copy to your library
10. While the reference(s) are highlighted go to the References menu, select Copy References To and choose the correct library. You can also do this by right clicking while the references are selected.



11. Finish your Online Search and return to your library by selecting Local Library Mode.

Add References from a PDF

1. In the File menu, select Import > File...
2. Select **Choose...** from the popup window to select a local PDF file, then use the import options shown.
3. Click **Import**. The new reference will appear as an Imported Reference, with the PDF in the File Attachment field.



Add References to a Word Document (using Cite While You Write)

****Word 2010 compatibility:** "EndNote X4 has been designed to be compatible with the 32 bit version of Word 2010. We do not currently have a version of EndNote compatible with the 64 bit version of Word 2010."

1. Open a new **Word** document.
2. Click on the **EndNote X4** tab in the menu bar.
3. Enter text > click where you want a reference to go > then click **EN Go to EndNote**.
4. You are returned to your EndNote library.
5. Single click on the appropriate reference > click the Insert Citation button .
6. You are returned to Word with the reference inserted in your text and the bibliography beginning to form below your text.

7. To reformat your bibliography in Word click on the **Style** drop down menu and choose a different style
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Using Groups to Organize your Library

Custom Groups make it easy to break a large library into subsets for later viewing. A group points to a subset of references that already exist in the library.

1. From the Groups menu > **Create Group** > give your group a name > press **Enter** key
2. There are several ways to add records to a group; highlight the record(s)
 - drag & drop to the appropriate group or Group menu > **Add References To** > select group

Smart groups are built with search strategies. Smart groups are dynamically updated as you add references to and edit references in the library.

1. From the Groups menu > **Create Smart Group**
2. A search box appears > name your smart group > enter your search strategy > click **Create**

Quick Bibliography or View your Bibliography in EndNote

Quick Bibliography in EndNote:

- select the output style you want (i.e. APA 6th)
- select references
- go to Edit Menu
- choose **Copy Formatted**
- paste into a Word document > correct formatting as needed

View your Bibliography in EndNote:

- select the output style you want (i.e. APA 6th)
- select references
- go to File Menu
- click **Print Preview**

Search your EndNote library

1. In the Tab Pane select the **Search** tab or from Tools menu > click **Search Library...**
2. Complete a search for a keyword or author that you think will appear in one of your records. Boolean search capability is easy to use and you can improve precision with “contains”, “is”, “is greater than”, etc.

For Further Assistance

- In the Endnote program, the **Help** button  can be very useful
- UT Library Resources > www.lib.utexas.edu/services/instruction/endnote.html
- EndNote Website
 - Online Tutorials: www.endnote.com/training
 - Technical Support and Services: www.endnote.com/support - Scroll down to **Guides, Tip Sheets and Information Pages**