

EndNote X6

Quick Start Handout

for Windows



Before Getting Started

Site License

EndNote is software for managing and searching bibliographic references. It stores, organizes, and formats citations for bibliographic references for journal articles, books, web pages, court cases, technical papers, and other forms of scholarly communication.

1. This software can be used by currently registered students, faculty, and staff at North Carolina Agricultural and Technical State University.
2. An eligible member's use of the software at a principal residence is limited to use related to coursework, research, or other work directly related to the user's relationship with the university.
3. This license is only valid while the owner of the computer is associated with North Carolina Agricultural and Technical State University, i.e. when a person leaves the University, whether to take employment elsewhere or because they have graduated, they must to remove EndNote from any privately owned computers or purchase a private copy.
4. Persons leaving the University may purchase a retail version of EndNote to ensure they retain rights to the software.

Things to Consider

1. It is advised to remove previous versions of EndNote before installing EndNote X6.
2. EndNote can generate a bibliography by citing and formatting references, a feature known as Cite While You Write™, in:
 - a. Apple Pages '09,
 - b. Microsoft® Word 2003, 2007, 2010,
 - c. OpenOffice.org Writer 3 for Windows.
 - d. Other word processors using RTF files, such as WordPerfect, OpenOffice.org Writer, StarOffice, & WordPad
 - e. Wolfram Mathematica 8
3. Instructional videos are available at www.youtube.com/endnotetraining

Installing EndNote



1. Uninstall any previous version of EndNote. Your EndNote libraries will not be affected.
2. Open the **EndNote X6** folder on your flash drive (as distributed by the Library Staff).
3. Click on **ENX6Inst.msi**



4. Follow the prompts to install. (Microsoft Word should NOT be open – if it is, you will be prompted to close it.)
5. At the **Select Installation type** prompt, we recommend selecting **Custom**. After selecting the destination of the EndNote folder, select at the **Select Features** prompt, “**Entire Feature will be installed on local hard drive**” from the drop down menu beside “**EndNote X6 for Windows**”
6. Check “**Install Direct Export Helper.**”



7. Click “**Next**” and “**Continue**” to follow prompts to install.
8. Run “**Update EndNote**” from “All Programs” folder monthly as EndNote provides irregular updates.

Definitions

Library: Collection of references

Reference: An item in your EndNote Library that consists of bibliographic information, e.g. title, author, publisher

Group: User defined method to organize references

Export, Download, Save, Send To: terms used to denote the process of beginning to directly export a citation to EndNote

Getting Started

Create New Reference

2 ways to create a new reference:

- A. **Manually create**
 - a. From the References Menu, Select “New Reference”. Or, click
 - b. Near the top menu bar, select which Reference Type
 - c. Type (or cut & paste) into each field
 - d. Close the box. And Save, when prompted.
 - e. Citation will directly import into EndNote & appear in the specified library.



B. Import directly from a database or other source (instructions provided use Firefox)

Examples:

From **EBSCOhost databases** (examples: Academic Search Complete & PsycArticles)

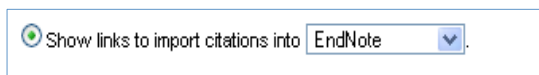
(For Single Reference:)



1. Click on the title of the citation.
2. Click on the Export link on the right hand of screen.
3. Select "Direct Export to EndNote, Procite, CITAVI, or Reference Manager".
4. Click on the orange Save button.
5. Click "Save" again, if prompted.
6. If prompted to open a file named "Delivery" with "Research Soft Direct Export Helper", click OK.
7. Citation will directly import into EndNote, and appear in the specified library.

From **Google Scholar**

1. First, Google Scholar Settings must be changed.
 - a. From scholar.google.com, go to Settings at the top right of screen.
 - b. In the Bibliography Manager section near the bottom of the page, click on the "Show Links to import citations into EndNote".
 - c. Save your changes.



2. There will be an Import to EndNote link after each citation.
[Cited by 284](#) - [Related articles](#) - [Cached](#) - [Library Search](#) - [All 3 versions](#) - [Import into EndNote](#)
3. There may be a "Cite" link. If so, click on it so see the "Import to EndNote" option.
4. Click on Import into EndNote link, when prompted click "Ok".
5. Citation will directly import into EndNote, & appear in the specified library.

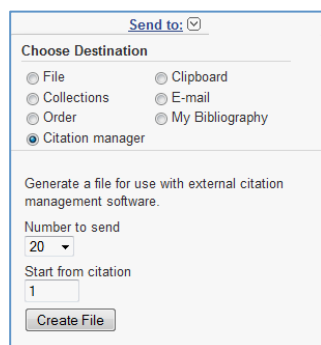
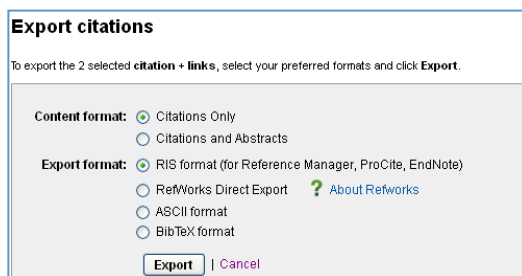
Optional: (To allow Google Scholar to connect to Bluford Library resources)

1. From scholar.google.com, go Settings at the top right of screen.
2. Select "Library Links" on the left of screen.
3. Type in North Carolina in the search box.
4. Select from list "North Carolina A&T State University – FullText@Bluford Library".
5. Click Save.

From **Science Direct**



1. From the result list, check on each citation desired.
2. Click "Export Citations" near the left side of the screen.
3. Select content format, & "RIS Format".
4. Click on "Export".
5. When prompted, click "Ok".
6. Citation will directly import into EndNote, and appear in the specified library.



From **PubMed**

1. Check on the desired citation from the results list.
2. Click on "Send to:" on the right hand side.
3. Select Citation Manager as the destination.
4. Click on "Create File".
5. If prompted, select the location of the file.
6. If prompted, select Ok on the "Opening Citations.nbib" pop-up box.
7. Citation will directly import into EndNote & appear in the specified library.

Adding Full Text to References

There are 3 ways to attach full text PDFs to a reference.

Search for Full Text Option

1. From EndNote library default screen, highlight all of the references where full text is desired. This feature works best with References that have a URL or DOI in appropriate reference field.
2. Click on "References," select "Find Full Text," then "Find Full Text," again.
3. An "EndNote Find Full Text copyright and usage notice" will appear. Please read and click "Ok".
4. On the left, "Find Full Text" option will begin to show progress of PDFs found, URLs found, and not found. A paper clip will appear beside references, if PDF found.

Attach a single PDF

1. It is best to save the PDF of a source when it is initially located, i.e. to a folder, flash drive, etc.
2. In EndNote, double click on the reference to open it.
3. Go to References menu, click on "File Attachments", then click on "Attach File".
4. Select a File to link to the reference. (The file that was saved earlier.)
5. Scroll down to the File Attachments field in the record. A PDF icon should appear of the document attached.
6. Close the record by selecting the red X. When prompted about changes, select "Yes". A paper clip will appear beside the reference.



Another option (new feature)

You may click on a pdf file outside of EndNote (on the Desktop, in a folder, etc.) and drag it to the reference within EndNote.

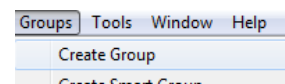
Import multiple PDFs at once (if you have several sources stored in one folder)

1. Go to the File menu. Select "Import", then "Folder".
2. Browse to location the file destination.
3. The import option should be PDF.
4. Select Import All, Discard Duplicates, or Import into Duplicates Library.
5. All of the PDFs will appear in the EndNote Library. A completed record will be created for those PDFs with DOI or URL fields. An incomplete record will be created for those without DOI or URL info.

To Organize Library

To **create a group**

1. Click on Groups at the top of the EndNote library screen.
2. Select "Create Group".
3. A box will appear under the My Group section on the left side of screen.
4. Type in the name that you would like for a group of your data. It could be organized however you prefer. Examples are by class, by subject, by assignment.
5. Press enter.

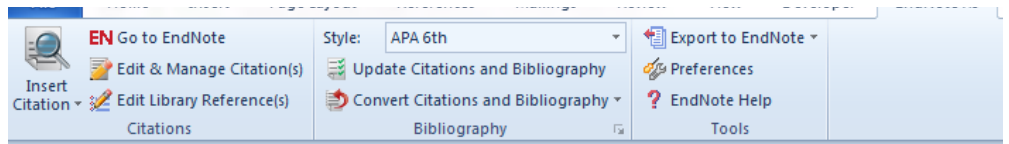


To **place references** into a group

1. Select a reference from the main library.
2. You may select more than one reference by holding the shift button and dragging the mouse to select more than one reference.
3. Drag the reference to the group name of the left side. A plus sign will appear and a box will form around the selected group.

To **view only** references in a particular group

1. Select the group name on the left side of screen.
2. Only references assigned to that group will appear.



Cite While You Write

Cite While You Write® is a feature that allows direct access to your EndNote library while writing your document, enabling citing and bibliography maintenance simultaneously.

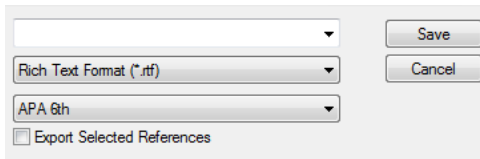
EndNote installs Cite While You Write commands in several word processing programs.

- Word 2003 displays an EndNote submenu of commands on Word's Tools menu.
- Word 2007 and 2010 displays Cite While You Write commands on an EndNote tab.
- Apple Pages '09 displays an EndNote submenu of commands on Insert menu.

1. From Word, place cursor where a citation should be placed.
2. Go to the EndNoteX6 tab, click on the "Insert Citation" icon. If prompted, select "Find citation".
3. An EndNote X6 Find & Insert My References prompt box will appear.
4. Type in a keyword or author name of the citation desired. Click on "Insert".
5. An in-text citation will appear in the document. A bibliography entry will also be inserted.
6. The bibliography will appear near the end of the document. The bibliography will remain at the bottom of the document as you continue to type.

Creating a Quick Bibliography (A list of references only)

EndNote can create a quick bibliography of the references in a library.



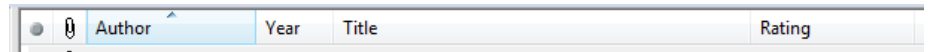
1. At the EndNote library, highlight the selected references.
2. Go to File, then Export.
3. Select the destination of the file created. Save as ".rtf".
4. Select the "Output Style". (e.g. APA 6th, MLA, IEEE, etc.). Click "Save".
5. Open the document from the destination selected.

(The document may need minor revisions, including formatting, name, title, etc.)

Notable Features of EndNote X6

Rating

You may rate a reference by 1) highlighting the reference, and 2) clicking on the coordinating star (1-star, 2-stars, etc.) in the Rating column to the left of the title column.



Mark as Read/Unread

You may mark a reference by 1) highlighting the reference, and 2) clicking on the gray or clear circle in the first column of the EndNote library window, next to the column where paper clips for attachments appear.



Highlight and Add Sticky Notes to a Pdf

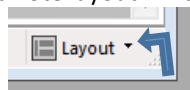
Text within a pdf attachment may be highlighted and noted using the highlight and sticky note options with the PDF Toolbar. This can be done by 1) highlighting the text, 2) selecting the Highlight Text button, and 3) selecting the sticky note option.

Share a Citation and Pdf with colleagues from within EndNote (only for Mapi compliant email programs like Outlook)

A citation and pdf may be emailed to a colleague by clicking on the email button in the PDF Toolbar.

Change layout options

There are several options for the EndNote layout window. Those can be accessed by Layout drop down menu at the lower right hand side of program window.



Sync with EndNote Web

EndNote Web and EndNote desktop libraries may be synced for library consistency. Before syncing, be sure to check for updates by clicking "EndNote Program Updates" under the "Help" Menu. To create a back-up file 1) select File>Compressed Library> All References & W/File Attachments, 2) Select a Location for the file, and 3) Click OK. To Sync, click on the Sync Button.

