

# ENDNOTE™

## **EndNote Basic: Organize your references and create bibliographies**

### **Creating Your EndNote Basic Account**

1. Find EndNote on Snowden Library's homepage
2. Click the link to "Sign up," then enter your email address, create a password, and provide your first and last names.
3. Return to EndNote Basic later by going through the library's homepage, and logging in with your email address and password.

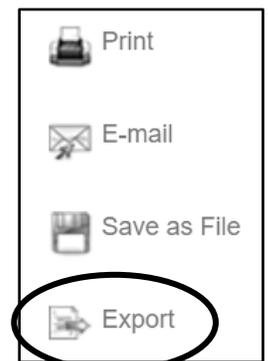


# Adding References – Export, Import, or Add

## *Exporting Citations Directly from Databases*

Some databases offer an Export feature that allows you to transfer citations directly into EndNote Basic. The following steps work in EBSCO databases (such as PsycINFO and Academic Search Premier), but similar steps will work in other databases, too.

1. Log in to EndNote Basic in a separate tab or browser window.
2. Run your search in the database as usual.
3. In the results list, select the citations you want to save by clicking the blue **folder icon** to the right of each source.
4. Go to **Folder View**.
5. Select the items in the folder that you want to export.
6. Near the right side of the screen, select the **Export** option.
7. Make sure that **Direct Export to EndNote Web** option is selected then check the **Save** button on the left side of the screen.
8. EndNote Basic should pop up on your screen.
9. Click the **My References** tab.
10. Click **[Unfiled] references** from the left side of the screen to find the new citations.
11. Put references into **Groups** (see page 5 of this handout.)



## ***Importing Citations using an Import Filter***

Some databases do not offer a direct import for EndNote Basic. Instead, you must save your citations as a text file and then import them into EndNote Basic. The process will basically be:

1. Check the boxes next to the citations you want to move into EndNote Basic.
2. Find a link to **Send to, Format, or Create File.**
3. Save the file to your desktop or another easy to remember location.
4. Open EndNote Basic and under the **Collect** tab, select **Import References.**
5. Select the file.
6. Under **Import Option**, select the database you used.
7. Under **To:** you have to select a group or use [unfiled.].
8. Click **Import.** *Note:* If your file is downloaded as one big citation, they probably weren't saved in the correct format: download them again, saving them in a different format.

## ***Adding References Manually***

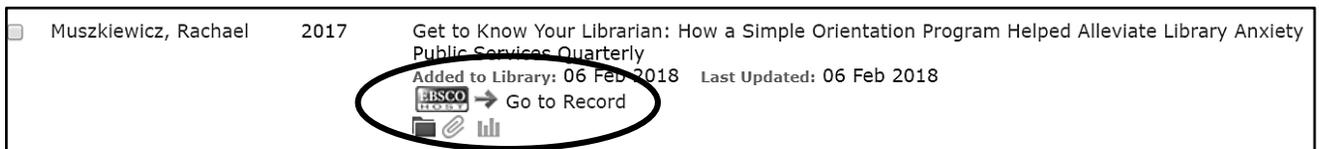
Occasionally you will need to add a reference to your Library by typing it in, rather than by downloading.

1. Select the tab labeled **Collect**.
2. Select **New Reference**.
3. Select the appropriate **Reference Type** (ex. Journal article, book section, book, etc.) EndNote Basic will display fields needed for that source type.
4. Fill in the appropriate fields. Author and page number fields should be entered as follows.
  - Authors must be entered one per line – press **Enter** after each author's name
    - Einstein, Howard G.
    - de Gaulle, Charles
    - Einstein, H G *or* Einstein, H.G. (*not* Einstein, HG)
    - Einstein, Albert, Jr.
  - Page numbers can be entered in any of the following forms, with commas between non-consecutive ranges
    - 1492-1497
    - 1492-7
    - 124-127, 130, 191-194
5. **Save** using the button at the top of the form.

# Linking PDFs or Other Files to References

You can attach a PDF or other file to a reference in EndNote Basic.

1. Click the **paper clip icon** to attach a file, or the bar chart icon to attach a figure.



(If the reference was directly imported from a database, there may also be a link to **Go to Record**.)

2. Click the option for **Attach a File**.
3. Choose the file(s) and click **Upload**.

## Creating Groups

Groups provide a nice way to organize your citations and group together citations on a similar topic or citations for a certain project.

1. Select the **Organize** tab from the top of the screen, and then click on **Manage My Groups**.
2. Create, rename, or delete groups.

# Sharing Citations

Groups can be shared with anyone who has an EndNote Basic account. The person you share your group with will see the shared group when they are logged into EndNote Basic.

1. Select the **Organize** tab from the top of the screen, and then click on **Manage My Groups**.
2. You'll notice there is a column with options for sharing. Check the box in the Share column then click the **Manage Sharing** button.
3. **Start sharing** by entering email addresses.
4. Choose between the **Read only** or **Read & Write** options.
  - Read & Write gives full access to the group; they can add, delete, and modify the citations in that group.
5. Click **Apply** to save.

# Creating a Bibliography

## *Using the Format Tab in EndNote Basic (no download required)*

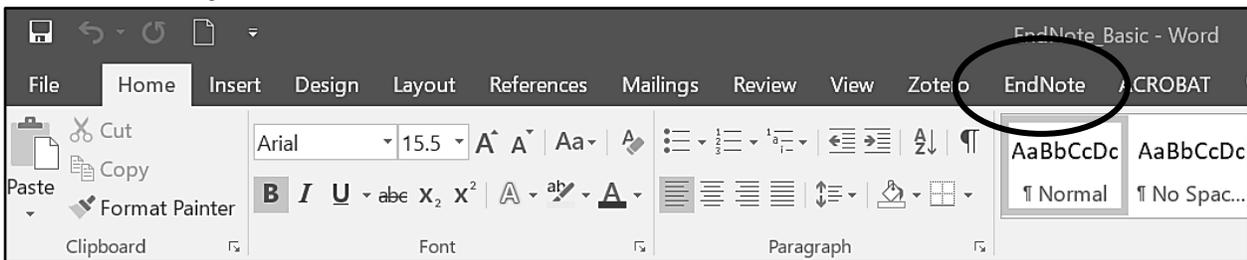
1. Click on the **Format** tab and then the **Bibliography** link.
2. Under **References**, select a group.
3. Under **Bibliographic Style**, you choose the style for your references.
4. Clicking the **Select Favorites** link will give you the option to select additional styles to choose from in the future.
5. Under **File Format**, select RTF for a word processing document.
6. Choose to **Save**, **Email**, or **Preview & Print** (works well if you plan to copy and paste the references into another document).

## *Using Cite While You Write (download required)*

1. Under **Format**, there is an option to download the **Cite While You Write Plug-In**. This will add a tool bar to your word processor and allow you to insert in-text citations and create bibliographies.
2. In EndNote, under **Downloads**, select the download type for your operating system.

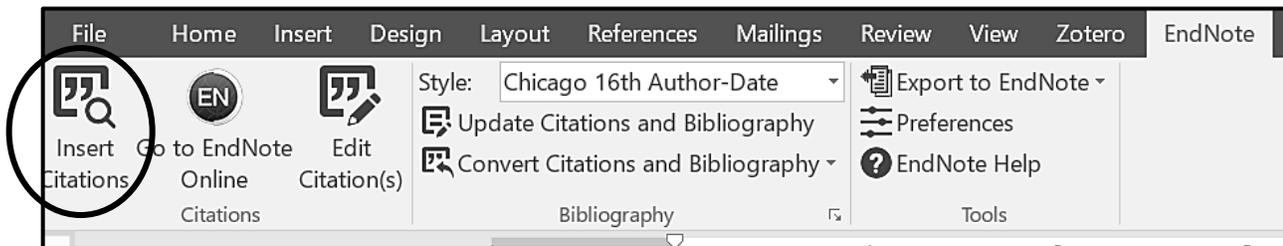
3. Follow the prompts to install Cite While You Write.

4. Your word processor's menu should now look like this.



5. On the EndNote ribbon, you'll see a drop-down menu to select a **Style**.

6. Place your cursor where you want to enter your first reference, and click **Insert Citations** in the EndNote Web menu. Select the one(s) you want to use and click **Insert**.



7. EndNote Web will embed the citation in the desired format, and append the bibliographic reference at the end of the paper.

- This can take a while; if you have many references, you may need to click **Update Citations and Bibliography**.

8. If you need to edit a citation, click on the citation, then click **Edit Citation(s)** from the Endnote ribbon.

9. Remember to proofread your bibliography! There may be small formatting errors or even typos that you should correct manually. If you find major formatting errors, make sure you are using the correct output style.