EndNote™ X8

Research Smarter.

Quick Reference Guide for Windows

Don't forget to download
the iPad App

What can you do with EndNote?

- Create a customized library of all your references.

- Insert those references in Word, Apache OpenOffice Writer (only compatible with Windows), and EndNote will automatically create citations and a bibliography matching the requirements of your selected journal or style manual—and it has over 6,000 bibliographic styles to choose from!

- Attach PDFs, sound files, videos, or any other kind of file to your references—up to 45 files per reference!

- Read and annotate attached PDFs.

- Organize your library using groups to categorize references by project, subject, or anything else you choose—and the same reference can be in as many groups as you want.

- Sync your EndNote references and groups across multiple computers, share references with others, track who has made changes to references in shared libraries and when they were made, and access your references from almost anywhere with any Internet browser by logging into your EndNote online account at my.endnote.com.

- And much, much more!

Track Activity
View a history of the changes made by your shared library colleagues via an activity feed.

Insert citations
Bring citations and references directly into Microsoft Word.

Share your library
Collaborate with up to 100 other X7 and X8 users.

Search easily
Access thousands of online resources within EndNote.

Organize your references
Create groups and drag and drop your references into them, or create automatic smart groups and let EndNote take care of this for you.

Sync your library
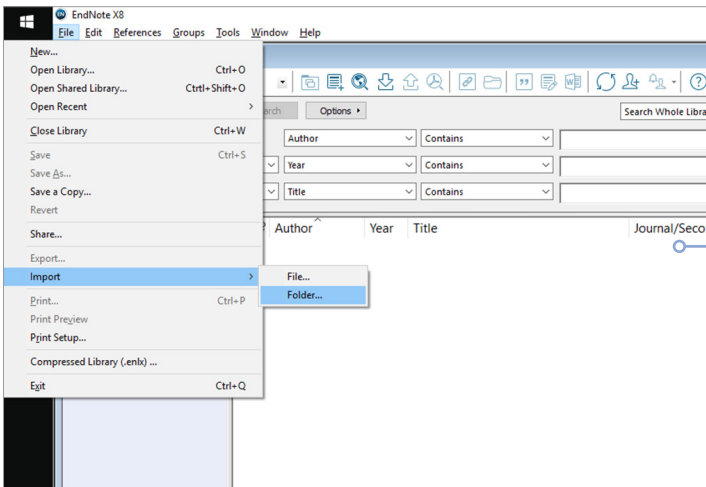Sync across desktop, online, and iPad®.

View and annotate your pdfs
Add sticky notes to your PDFs and search for them later. Use the built-in email functionality to quickly share a reference and its file attachments with others.
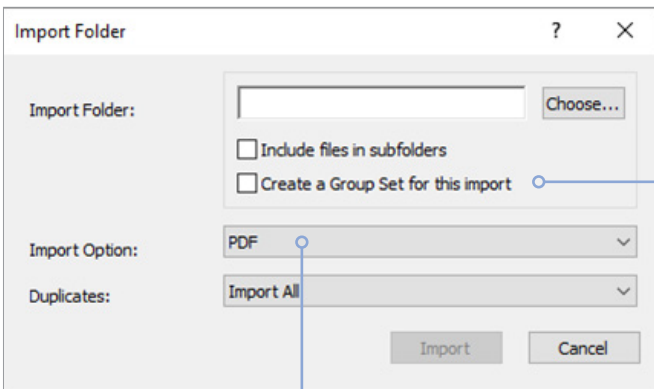
Get started in 5 steps.

① Create your EndNote Library

Create and save
Go to File > New. Save your library in your Documents folder.

② Import your PDFs

Create Groups for PDFs Automatically
Mark both these boxes and EndNote will automatically create custom groups for subfolders when a folder of PDFs is imported.

Import pdfs
If you already have PDFs of full-text articles on your computer, you can start by importing them into your EndNote library. With your library open, go to File > Import to import one PDF or a folder of PDFs.

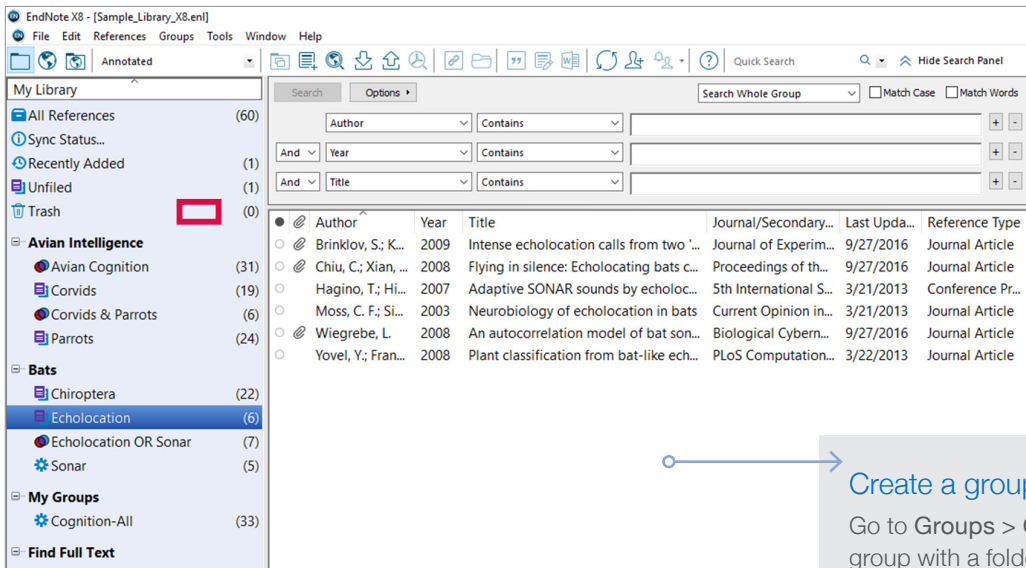## ③ Import references from...
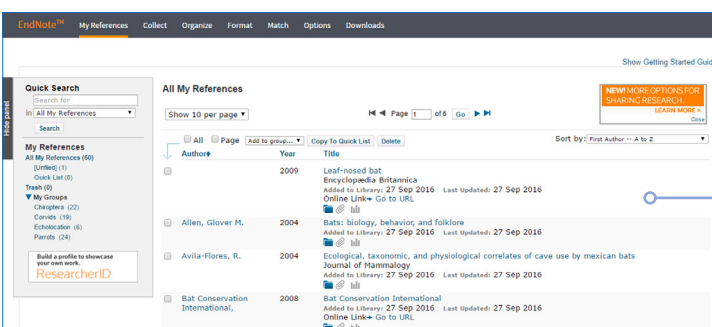
Import references
Many online databases give you the ability to export references to your EndNote library. Look for the option to save, export, or send to EndNote. The EndNote option might also be labeled as "RIS."

④ Organize your references into Groups

Create a group

Go to **Groups** > **Create Group.** This creates a group with a folder icon on the left. Give your group a name. Drag and drop references from your library into this group. The same reference can appear in multiple groups and is not duplicated when you do this.
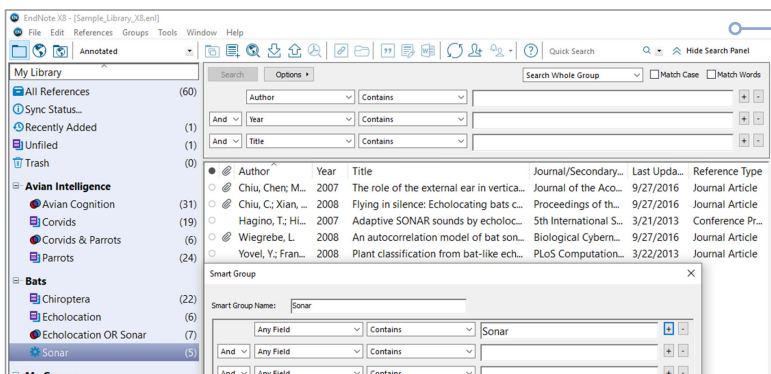
Create a smart group

Go to Groups > Create Smart Group. Defi ne a search parameter and give this group a name. Click on the Create button. A Smart Group automatically shows references that match that search. This group will also instantly update as you add more references to your library that match that original search.
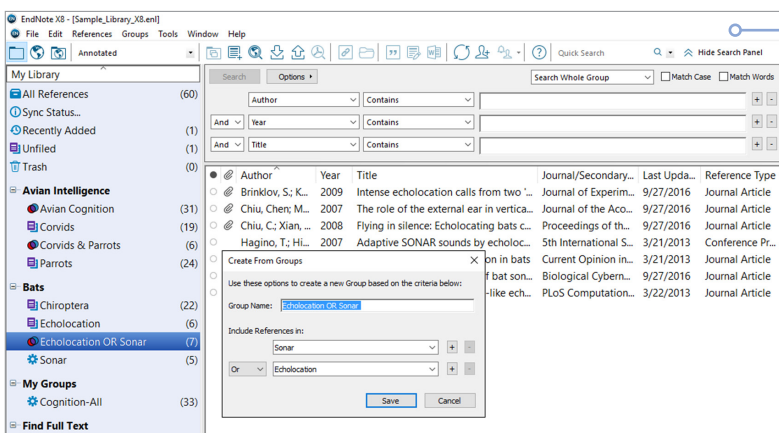

Combined groups

Explore the relationships between your existing groups. Go to Groups > Create From Groups. Pick at least two groups in the drop-down menu and select your Boolean operator of choice. Give this group a name, click on the Create button, and a combined group will appear on the left. This group is also a smart group and will update as your component groups change.

⑤ Sign up for sync to access your library anywhere...And share

You can automatically sync your desktop, online, and iPad libraries so that all the references, attachments, and annotations in one can be accessed from the other. Although only custom groups will appear online or on the iPad, all groups and group sets will appear on all synced desktop computers.

Three ways to access your library:

1) EndNote Desktop
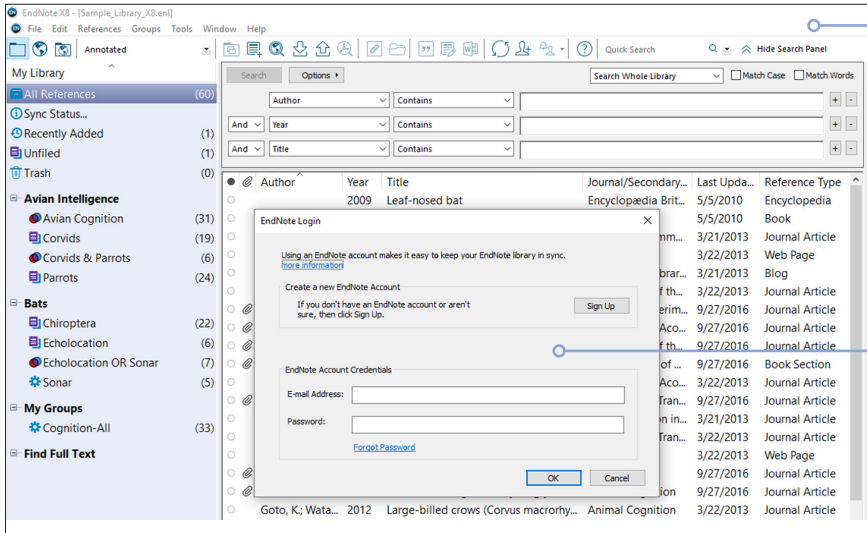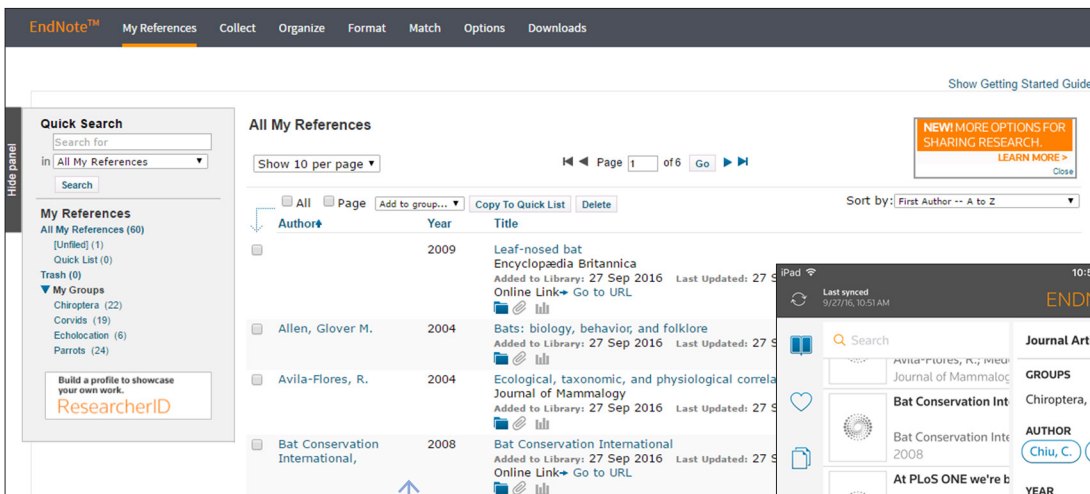

Get started

With your library open, select the sync button to get started.
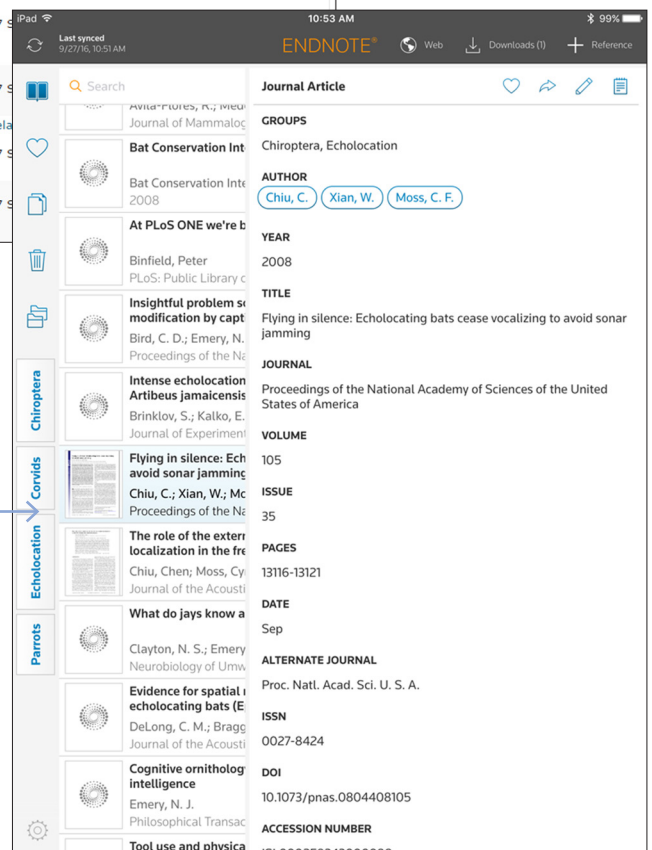
Sign in

Sign in with your EndNote online account or create a new account. If you already have a Web of Science account, use that login to access EndNote online and the accounts cross-reference each other.

2) EndNote Online

Access your library

Access your library online and on the iPad app.

⑥ Easily share your entire library with your team

Manage collaboration
You can remind users who haven't accepted or remove members when you're fi nished working together.

Invite colleagues
Select the Share button to begin inviting your colleagues to share your library.

Track invitations
Keep track of who you've already invited and whether they've accepted and are a member or not.

Personalize invitations
To invite other EndNote users, enter their email addresses and add a personalized message.

Invite up to 100 other collaborators
You can invite up to 100 others to join your shared library. All members you invite have read/write access to your full library and can referencadd and edit es, fi le attachments, and notes.

Join other teams
You can also have an unlimited number of libraries shared with you by other EndNote users. Once you've accepted their invitation, go to File > Open Shared Library to access them.
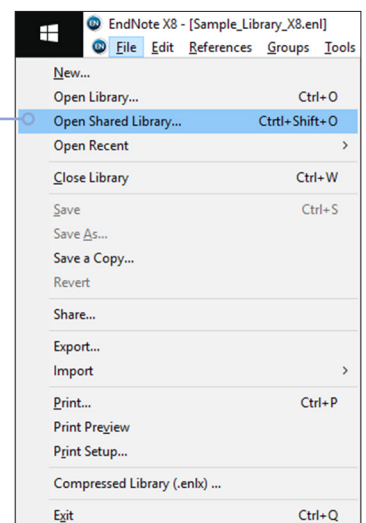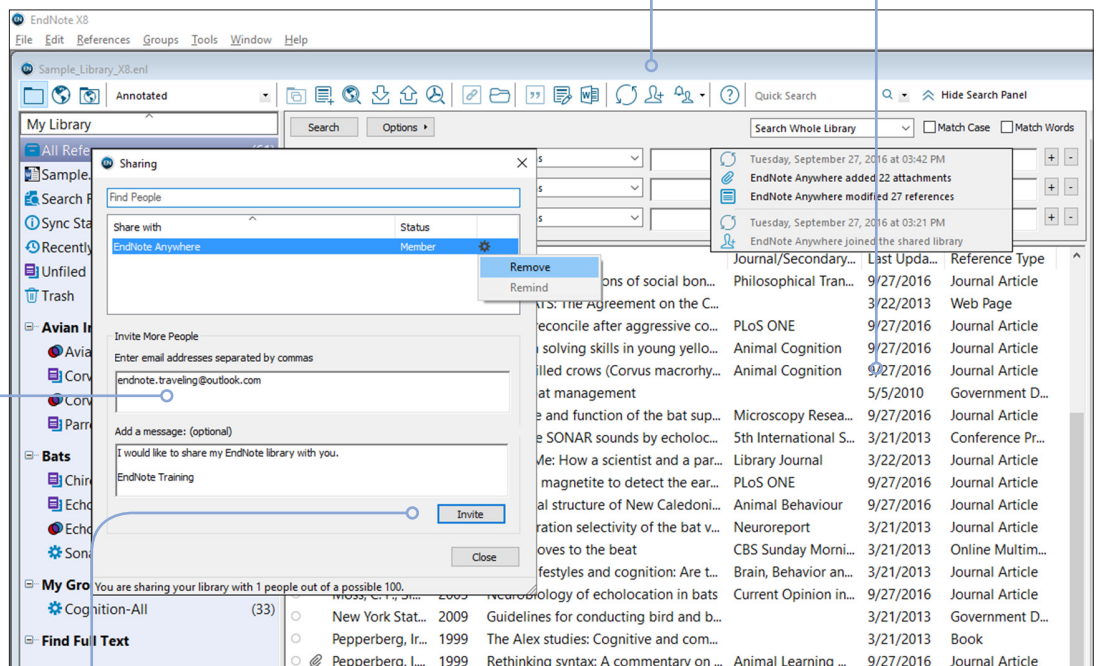
(7) Cite references in Word

Powered by patented CITE WHILE YOU WRITE™ technology.

Open a document in word

Now that you have some references in your EndNote library, you can start to cite them in your documents.

Use the following Cite While You Write commands to insert citations, edit citations, and change styles as needed.

Find and insert my references

Place the cursor in your document where you would like a citation to appear. Use this command to search for a reference in your EndNote library and insert it into your paper.
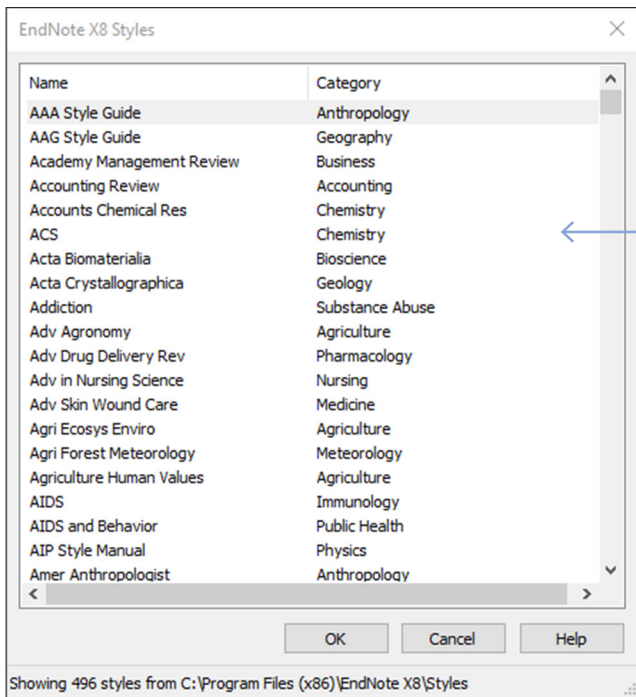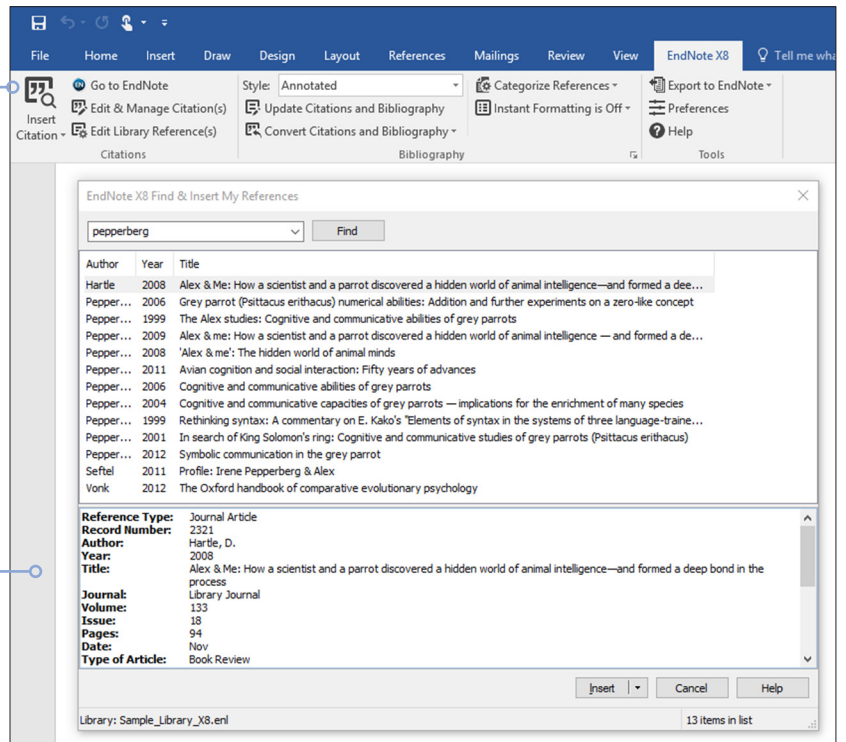
### Pick a style

Use the style drop-down to pick a style from among your favorite styles or choose Select Another Style to see a bigger list of styles. You can download more styles at endnote.com.

Edit and manage citations

Use this command to edit specific citations:

- Change the formatting of your in-text citations.
- Add a prefix, suffix, and/or pages to your citations.
- Remove citations.
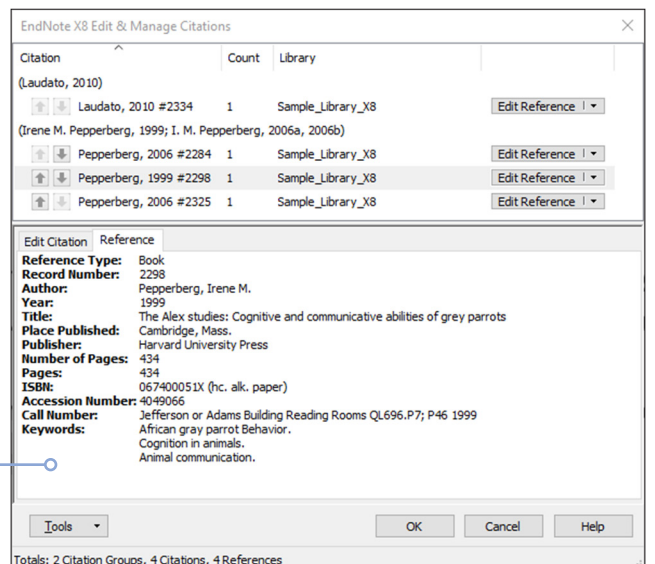
Did you know...?

Endnote can find the full-text article for you

If you have access to PubMed LinkOut and/ or OpenURL, you can point EndNote to these resources when you run the Find Full Text feature. In the EndNote preferences, go to the Find Full Text setting and check the PubMed LinkOut box. Enter your OpenURL server in the OpenURL Path box. If you have an EZProxy server, put that into the authenticate with box.

To run Find Full Text, select one reference or multiple references in your library. Then use the Find Full Text button in the toolbar or go to References > Find Full Text.
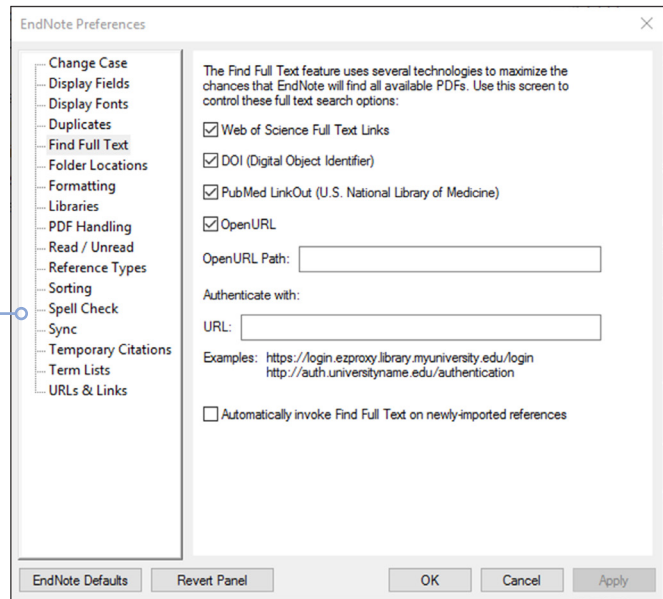

You can manually enter references

You won't be able to fi nd everything online. To enter a reference manually, go to References > New Reference. This opens a new reference window for you to start typing (or pasting) into the fi elds. Here are some guidelines on entering references:

1. Set the reference type in the drop-down menu at the top of the record window.

2. Enter author names as follows:

Smith, John Oscar (Last name, First name) Smith, J.O. (Initials separated by periods) Center for Disease Control and Prevention, For multiple authors, enter each new author on a new line within the Author field.
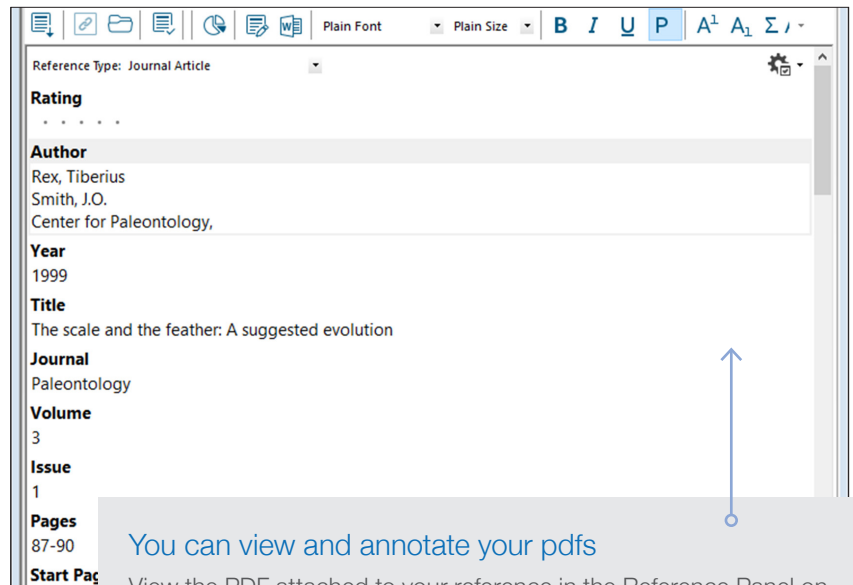
You can view and annotate your pdfs

View the PDF attached to your reference in the Reference Panel on the right or use the Open PDF/Close PDF toggle button to view it in full-screen mode.

You can highlight, underline, strikethrough, and add notes directly within the PDF Viewer. These annotations are editable by all when you share your library. When you sync, you can resume editing them on the iPad app, or review them in EndNote online.
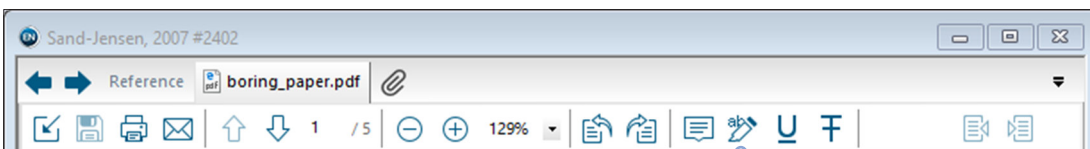
You can highlight, underline, strikethrough, and add notes directly within the PDF Viewer. These annotations are editable by all when you share your library. When you sync, you can resume editing them on the iPad app, or review them in EndNote online.

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Need Help?

Additional training resources

Whether you want to get the basics or fine-tune your skills, Thomson Reuters can help with a variety of training resources, including recorded trainings, live expert-led WebEx sessions, and downloadable materials at endnote.com/training. Subscribe to our YouTube channel to receive training video updates at youtube.com/endnoteTraining.

Getting Technical Help

Search our Frequently Asked Questions Knowledgebase or contact our expert technical support staff at endnote.com/support.

Ask the community

One of the most important benefits of EndNote is our knowledgeable and committed user base. Follow us on Twitter™, like us on Facebook™, or join our user forum accessible on our online platform at http://community.thomsonreuters.com/t5/EndNote/ct-p/endnote

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