GETTING STARTED WITH ENDNOTE BASIC

What is EndNote Basic?

EndNote Basic is an online program that helps you organize references and create properly formatted bibliographies. This is a separate program from the desktop version of EndNote.

Creating Your EndNote Basic Account

1. Go to EndNote Basic via http://purl.lib.uiowa.edu/endnote
2. Click the link that says "Register" near the bottom of the screen. Follow the prompts to create an account.

Logging into Your EndNote Basic Account

1. Go to EndNote Basic via http://purl.lib.uiowa.edu/endnote
2. Click on the link for EndNote near the top of the screen.
3. Enter your email address and password. Occasionally, you will need to click on EndNote again.

Adding References

Importing Citations Directly from Databases (ex. Web of Knowledge/Science)

The following steps work in Web of Knowledge databases (such as Web of Science). EndNote Basic is connected to Web of Knowledge, so the export process is very simple.

1. Logon to EndNote Basic in a separate tab or browser window
2. Check the boxes to the left of the citations you want to add.
3. Click the link for **Send To: my.endnote.com**
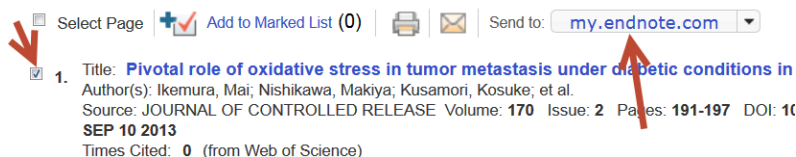
4. You can chose to collect just the citation, or the citation and the abstract in the following drop box.

5. The citations will show up in EndNote Basic under **My References→ [unfiled]**

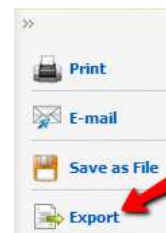### *Importing Citations Directly from Databases (ex. EBSCO)*

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 CINAHL and Academic Search Elite).

1. Logon to EndNote Basic in a separate tab or browser window.
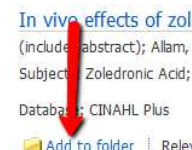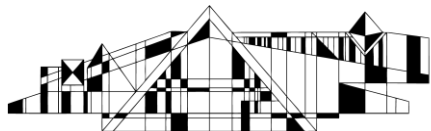
2. Run your search as usual. From the list of results, select the citations you want to save by clicking the "Add to Folder" link.
3. Click the **folder** icon ![Folder] near the top right hand side of the screen.
4. Select the items in the folder.
5. Near the right hand side of the screen, select the **Export** option.
6. Make sure that **Direct Export to EndNote Web** option is selected and then, check the "Save" button on the left side of the screen.
7. EndNote Basic should pop up on your screen.
8. Click the **My References** tab.
9. Now, click **Unfiled References** from the left side of the screen to find the new citations. It is recommended that you put references into **Groups**. This is discussed later on in the handout.

Importing Citations using an Import Filter (ex. PubMed)
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.

1. Check the boxes to the left of the citations you wish to move into EndNote Basic.
2. Click the **Send to** link near the top right of the screen.
3. Select **File**.
4. Under **Format** select **MEDLINE.**
5. Click the **Create File** button.
6. Now, save the file to your desktop or another easy to remember location.
7. Open EndNote Basic and under the **Collect** tab, select **Import References.**
8. Now, select the file.
9. Under **Import Option**, select **PubMed (NLM).**
10. Under **To:** you have to select a group. NOTE: You can create a new group on this page, or you can select [unfiled] if you don't want to select a group at this time.
11. Click **Import**. *Note:* If your file is downloaded as one big citation, they probably weren't saved in the correct format: download them again, being sure to save them in the MEDLINE format. If it still doesn't import properly, you may need to update the filter.

NOTE: If you do not have EndNote Desktop installed, you can directly import citations into Endnote Basic from PubMed, by selecting **Citation Manager** option instead of saving the text file as mentioned above. After import complete, view unfiled references to assign them to groups.

Adding References Manually
Occasionally you will want to add a reference to your Library by typing it in, rather than by downloading. Here are some tips:

1. Select the tab labeled **Collect.**
2. Now, select **New Reference**.
3. Select the appropriate **Reference Type** (ex. Journal article, book section, book, etc.)

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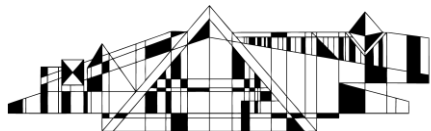
EndNote Basic will display fields needed for that type (editors' names, chapter authors' names, etc.).

4. Fill in the appropriate fields. Author and page number fields should be entered as follows.
   o Authors must be entered one per line, so 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.
     ▪ American College of Physicians, (notice the comma at the end)
   o **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

Removing Duplicates

- Select **Organize** and then **Find Duplicates**. EndNote Basic will scan the Library, and will then show duplicate references it detects.

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NOTE: The same article downloaded from different databases may have slightly different authors, titles, and even journal names (some databases do not include all authors for example, or may include a longer subtitle); EndNote Basic will not usually recognize these as duplicates.

Linking PDFs or Other Files to EndNote Basic References

You can attach a PDF or other file to a reference in EndNote Basic. The file can be on your own computer or on the Internet.

1. Click the paper clip icon at the bottom of the reference to which you would like to attach a file.
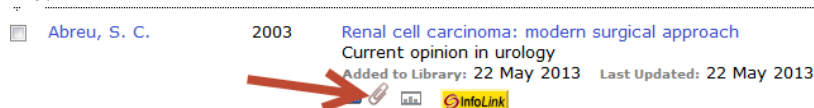

2. Now, click the option for **Attach a File.** NOTE: You can also attach figures using the icon to the right of the paperclip icon.

Finding Full Text

1. To see if full text is available, use the InfoLink button . (It is generally located near the top right of the citation).

2. If no full text is available, contact us at Hardin or use our interlibrary loan service http://www.lib.uiowa.edu/hardin/illa.html

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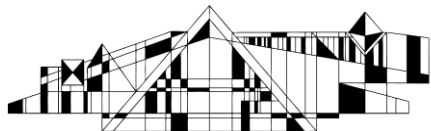
Groups provide a nice way to organize your citations and group together citations on a similar topic or citations for a certain project.

1. Select the **Organize** tab from the top of the screen, and then click on **Manage My Groups**.
2. From this page, you can create, rename, or delete groups.

Sharing Citations

Groups can be shared with anyone that has an EndNote Basic account. Free EndNote Basic accounts are available to anyone. The person you share your group with will not receive an email, but they 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 next to **Share** and then click the **Manage Sharing** button.
3. You can allow people to view your citations, or you can allow them full access to the group using the **Read & Write** option. Be aware that if you allow someone **Read & Write** access, they can add, delete, and modify the citations in that group. You can modify or turn off sharing at any time.

Producing a Bibliography

Using the Format Tab in EndNote Basic (No downloads required)
1. Click on the **Format** tab and then the **Bibliography** link.
2. Under **References**, select a group. (NOTE: Under **All My References** there is an option to "Copy to Quick List" if you do not have a set group of references.)
3. Under **Bibliographic Style**, you can choose the style of your references. Clicking the **Add to Favorites** link will give you the option to select additional styles to choose from in the future.
4. Under **File Format**, you can select HTML, TXT, or RTF. RTF would be recommended for a word processing document.
5. Choose to **Save, Email,** or **Preview and Print** (the last option would work well if you plan to copy and paste the references into another document).

Using Cite While You Write
1. Under **Format,** there is an option to download the **Cite While You Write Plugin.** This will add a tool bar to your word processor and allow you to insert in-text citations and create bibliographies.
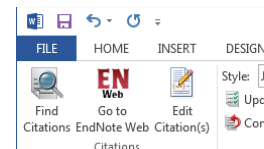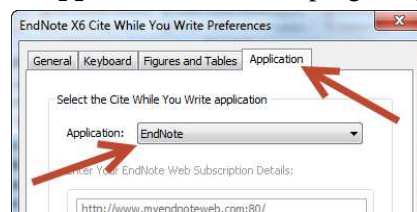
   Once you install the plug in, you will see a menu similar to the one below (example is from Office 2010 or Office 2013).

2. Under **Preferences**(far right of the menu), you can select **Application** to tell the program you are using **EndNote Web** (which is the same as EndNote Basic in this case)**.** You will then be prompted to login to your account.

3. Your menu should now look like this.

4. At the top of the EndNote Web ribbon, you'll see a drop-down menu showing the style currently being used. Use this box to select the appropriate **Style.** NOTE: You will need to set up favorite styles using the **Format→Bibliography** section of EndNote Web. Only the styles in your favorites will show up in the EndNote Web toolbar and you have a limit of 25 favorite styles.
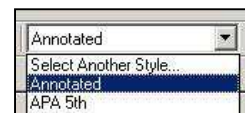
5. Place your cursor where you want to enter your first reference, and click **Find Citations** in the EndNote Web menu. A window will open. Enter keywords and click **Search** to search through your whole library. A list of matching references will appear. Select the one(s) you want to use and click **Insert**.

1. EndNote Web will embed the citation in the desired format, and append the bibliographic reference at the end of the paper. This may not be instantaneous; if you have many references, you will probably first see a generic citation that looks like this: {Albretsen, 1998 #11} for a short while before the formatted citation appears. If it doesn't reformat automatically, click **Update Citations and Bibliography** from the **EndNote Web** ribbon's **Bibliography** panel.

6. If you need to edit a citation (e.g. remove the author or year from the in-text citation or remove one citation from a group of several), click on the citation, then click on **Edit Citation(s)** from the Endnote toolbar.

7. 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.

Removing Field Codes

Occasionally, publisher will ask that submitted manuscripts do not contain codes from citation managers. These steps will help you remove EndNote Web's codes from your document.

1. Click **Convert Citations and Bibliography** from the **EndNote Web** ribbon's **Bibliography** panel.

2. Then select **Convert to Plain Text**. Word will create a new copy of your document without the field codes. NOTE: Be sure to keep the original version of your document with the field codes in case you need to make any changes. EndNote *cannot* work with a document that has been converted to plain text.

Changing the Format of a Bibliography

2. In the **EndNote Web** ribbon's **Bibliography** panel, select the output **style** you want to use. If your style isn't on the dropdown, pick **Select Another Style…**to see the full list.

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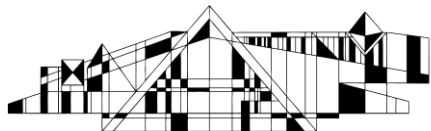
> **Select** the appropriate style and click **OK**. It may take a few seconds for the bibliography to be reformatted.

3. If it doesn't reformat automatically, click **Update Citations and Bibliography** from the **EndNote Web** ribbon's **Bibliography** panel.

Need More Help?

EndNote's Help files contain a lot of very good information, and is generally well-written. Advanced users are advised to review the table of contents and read sections of interest.
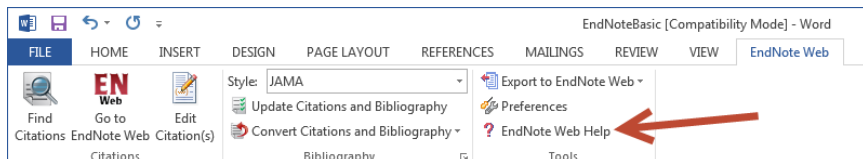
You may contact Technical Support for Endnote by phone:
1-800-336-4474 (press 4)

You can also view the EndNote page at Hardin for additional information.
http://www.lib.uiowa.edu/hardin/endnote.html

As always, you can contact the Hardin Library Reference Desk (lib-hardin@uiowa.edu, (319) 335-9151) with any questions.

Thank you to Lynda Howell at UTHSCSA, who wrote the handout which formed the basis of this guide