

# How to use EndNote 8

- How to get it from Upstate Library website
  1. On library website, find EndNote under the **Quick Links**
  2. OR Go to SERVICES > Writing and Publishing Support and find EndNote in one of tabs
- How to create a new library
  1. Click on File > New
  2. Never save EndNote library in any cloud drive or network drive folder
- **How to add a new reference**
  1. By doing an online search in EndNote itself
    - Need to add PubMed as a source
    - How to add PubMed as a source of Online Search
    - Go to Tools > Online search
    - Search for PubMed (NLM) in the list of resources, and click choose
    - How to search a reference through EndNote Online Search?
  2. From the website (e.g. Google scholar or PubMed)
  3. By adding/importing PDFs you already have
- Organizing your references:
  1. Manual Groups and Group sets
  2. Groups > Create Group/Group set
- EndNote can act as your PDF manager
  1. Find full texts of the references
  2. If you already have folders of PDF papers organized, you can just import the main folder and EndNote will not only create the library of all the papers, but also maintain the folder structure in form of groups
    - File > Import > File/Folder
  3. Read/Highlight/Add sticky notes (searchable) PDFs right in EndNote
- **Fun Fact:** EndNote can update the references in your library for you
- Output Styles:
  1. Select another style, and choose from the list
  2. You can edit particular output style or create a new output style as well
    - Go to Edit > Output Styles
  3. Changing output style doesn't change the reference itself
- **Inserting references into Word document (Cite while you Write)**
  1. When you install EndNote, it will automatically insert files for Word, and add itself to menu
  2. From Word: Click Go To EndNote (Alt+1) ; from EndNote: click on Go To Word Processor (Alt+1)
- How to insert citations:
  1. Click on Insert Citation, find your reference, click on Insert and select the option what you want
  2. Insert selected citation
    - Make sure the cursor is at the right place before inserting
    - Go to EndNote, select/highlight the references you want to add
    - Then go to word, click on drop down menu under insert citation and select Insert selected citations
    - Or you can just hit Alt+2, and it will insert selected references
  3. Inserting citations will create a bibliography at the end of the document simultaneously
- **Fun Fact 2:** You can change the output style right into the word without going to EndNote, Just select another style

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- **How to format bibliography**
  - Select small arrow at bottom right in Bibliography field
  - Configure bibliography
  - Here you can edit bibliography alone without affecting in line citations
    - Change layout:
      - Title, fonts, line spacing
  - You can also connect in line citation to the one in the bibliography, so you can directly jump from text to bibliography
- **How to Edit/remove Individual citations in Word:**
  1. In Word, go to Edit & Manage Citations
  2. You can remove a particular citation from Word here
  3. You can insert other citations to create a group citation (citing multiple papers at a time)
- **Plain Text citations**
  1. If you need to send somebody (like a publisher, or someone who doesn't use endnote) paper with references that looks the same but without the field code
  2. **Always save your document first**
  3. Then click on Convert Citations and Bibliography > Convert to Plain Text
  4. Save the new document with a different name
- **How to send a complete library/group of references with/without PDF attachments?**
  1. Select references, if planning to send only some references
  2. Go to File > select Compressed library

***Check out EndNote YouTube channel 'EndNote Training'***  
***(<https://www.youtube.com/user/EndNoteTraining>) for more details of how to***  
***use EndNote 8***