# EndNote Quick Start: an introduction to EndNote

## Video description

6.21 minutes video

Learn how to manage your references with EndNote.

## Transcript

NARRATOR:

EndNote is software that helps you to manage your references and generate citations and bibliographies in a range of styles.

In this video we will explain how to set up an EndNote Library with references, and then we will explain how to use these references in a Word document.

Before you can use EndNote to produce a bibliography, you need to import the necessary information into an EndNote database of references. This is called an EndNote Library.

There are several ways of doing this. We are now going to show you how to import PDFs you have previously downloaded and then how to import references from a journal database.

The PDF import option allows you to convert PDF articles you’ve previously added to your computer drive into EndNote references.

To use this feature, you need to be connected to the internet so EndNote can extract the Digital Object Identifier – also known as the DOI – from the PDF file and then match that information with data available online.

The bibliographic content is then captured and used to create a new EndNote reference.

Scanned PDFs will not have this information and so for scanned PDFs you will need to manually populate bibliographic information fields.

To import PDFs, first, open your library in EndNote and go to the File menu and select import. Choose “File” if you wish to import one PDF. Or Choose “Folder” if you would like to import a folder of PDFs.

In this example, I will import a folder of PDFs from my desktop. I need to select the Choose button and browse to locate the folder. I select the folder and select the OK button. Then, select the Import button to start the import.

After the import has completed, you will see the references in a temporary group called Imported References. For references where EndNote was not able to download bibliographic content, a record is created with the PDF attached showing the name of the PDF file in the Title field.

You can easily manage your PDFs using EndNote’s PDF viewer. This allows you to read PDFs, highlight text. And you can add sticky notes to the PDF, the content of which can be searched for later on.

Another method of importing references is through direct export from a journal database. I am going to import some references from PubMed as an example, but this method can be used with many other online databases.

I am using Firefox for this example because it supports direct export on both the Windows and Macintosh platforms. Internet Explorer is another good option.

To begin, perform your search of the online database and select the references you want to import.

For PubMed, mark the references to select them. Click the Send to link then select Citation Manager. Different databases will have different ways of selecting references and preparing them for export.

So, this link may be called something different by other data providers. It may be called different names, such as direct export or export to citation manager. And it could look different: it might be a large button, or possibly a hyperlink in very small text. So, look for something that talks about saving, exporting, or importing references.

For our PubMed example, selecting Citation Manager will save it in the correct format for direct export.

Then click Create File. And Firefox will ask if you want to open the file and what program you want to open it with. Select EndNote. Click the OK button. And Click the next OK button.

If the database is set up for direct export, the references will import right into EndNote. The new references are shown in the Imported References temporary group. And they have also been added to the All References group.

Note that References downloaded from a database will not have the PDF automatically attached. However, EndNote can try to find the PDFs for you.

First, select the reference in EndNote. Then click the Find Full Text button. Click the OK button.

And if EndNote is able to find the PDFs, you will see a paperclip icon appear by the references. Once a reference is in the EndNote library, a citation can be added to a Word document.

In Word, click where you want to put an EndNote citation. Then click the Go to EndNote button. Select the reference or references you want to insert. Click the Insert Citation button. And the reference is inserted into your paper and instantly formatted.

To change the citation style, select the tiny arrow in the bottom right corner of the Bibliography Group. And select the style you want from the list of favorites. If your favorite style is not showing, you can use the Browse button to see more styles.

Once selected, click the OK button. To add page numbers to a citation, click on the citation, then click the Edit & Manage Citations button. Add page numbers to the Pages field, then click the OK button.

So, to start using EndNote now, try importing a folder of PDFs. Alternatively, export references from the journal article database.

For references without an attached PDF, use the Find Full Text option. Use EndNote’s PDF viewer to annotate your PDFs. And, within Word, open the EndNote tab, then select your references in EndNote to automatically generate a bibliography.

For more information on using EndNote, visit the [Library’s EndNote page](http://www1.rmit.edu.au/library/endnote) [www.rmit.edu.au/library/endnote]

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