



## EndNote X3: Getting Started

- Endnote is a tool to help organize references and create bibliographies.
- CSUS has a site license and the software can be freely downloaded by faculty, students and staff from: <http://www.software.csus.edu/>
- For help on downloading go to: [http://library.csus.edu/guides/metzgerd/EN/Download\\_Instructions.pdf](http://library.csus.edu/guides/metzgerd/EN/Download_Instructions.pdf)
- *IE works better than Firefox on a Windows machine*
- *Disable Zotero if using Firefox*
- **Always check for references for accuracy and completeness**

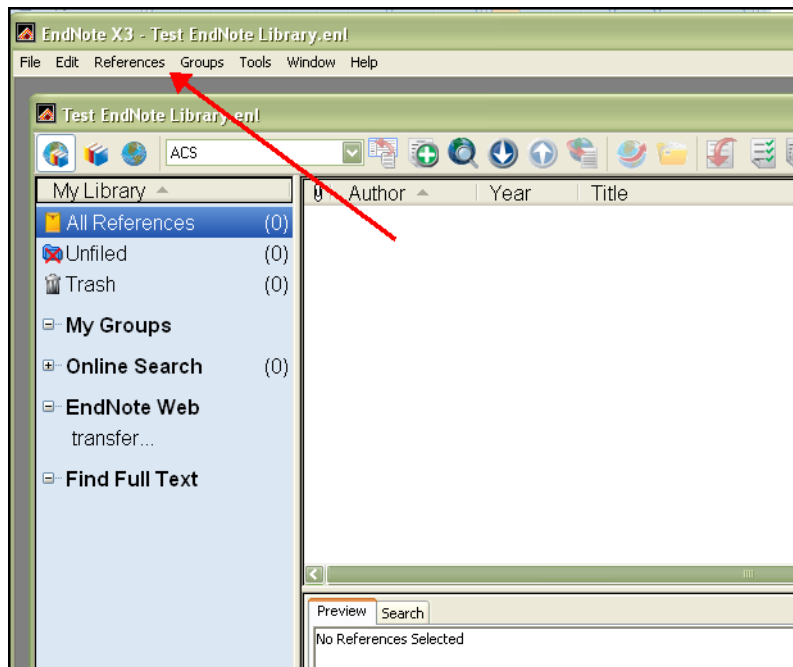
### Open an Endnote Library

1. Open EndNote
2. Select the radio button next to **Create a new EndNote library** in the introductory dialog box.
3. Click **OK**  
--Or go to an existing EndNote library...

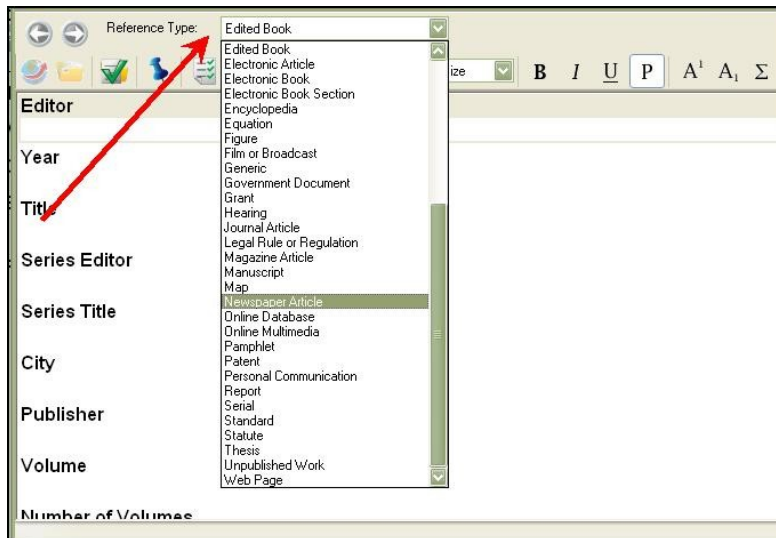
Your Endnote library has 2 parts: filename.enl and filename.data [a folder]. Both are required for a complete EndNote library.

### Add References to your Library: **Manually**

1. From the main menu bar, click on **References** and then select **New Reference**.



2. Select the appropriate **Reference Type** (journal, book, etc.) from the pull-down menu



3. Enter the citation information [EndNote adds punctuation]

1. Enter surname first [Einstein, Albert]
2. Enter each author on a separate line
3. Enter volume or issue numbers only [e.g., 5 not v.5]
4. Separate keywords with a semicolon, backslash or enter
5. Notes are fields that you can define

4. To close a reference click on the **X** button or select **Close Reference** under the **File** menu



The **Preview** pane at the bottom of the screen displays a selected reference in the selected format style. Not all fields will be displayed. To see the complete reference double click on it from the main [Library] window.



**To change the bibliographic format style:**

1. Highlight the Reference you wish to change [or go to **Edit** then **Select All** to change all of them]
2. Click on the **Select Another Style** drop-down menu. If you don't see the format you need, click on the **Select Another Style** and a very long list will appear.

## Adding References to your Library: *Using Direct Export*

1. Open EndNote in one window and minimize [*keep it running in the background*]
2. There are many databases from which you can directly export references into Endnote. The exact method will vary with the database vendor, however the general instructions are:
  1. **Select or mark** desired references
  2. Click any option that indicates you want to **Download** or **Export** those references (terminology varies by vendor or database).
  3. Select the **EndNote format** when prompted.
  4. Click **Download, Export, Send**, etc. (terminology varies by vendor or database).
5. One of two things will happen :
  - The references will be directly imported into EndNote.
  - OR
  - You will be prompted to **Choose an import filter** for the database and then the references will be directly imported into EndNote
6. If unsuccessful, try saving file as a tab delimited text file and importing the .txt file

## Adding References to your Library: *Using Export from EBSCO databases*

1. Open Endnote in one window.
2. In a different window go to the CSUS Library, (<http://library.csus.edu>) and select **Articles**, and then a subject or use the alphabetical list of databases to select a database. [*for this example Academic Search Premier is used*]
3. Conduct a search and click on **Add to Folder** all references you wish to move to EndNote

Results: 1-30 of 156      Sort by: Date      Add (1-30)

Page: 1 2 3 4 5 Next

Results for: bicycle and mechanics      Alert / Save / Share >

Search Mode: Boolean/Phrase

1. [Respiratory Response during Bicycle Ergometer Exercise with the Trunk Leaning Forward and the Upper Limbs Supported.](#)  
Kohno, Kenichi; Akiyama, Sumikazu, Rigakuryoho Kagaku 2009, Vol. 24 Issue 4, p535 (English Abstract Available)  
Database: SPORTDiscus  
[Add to folder](#)      [Find It](#)      [Find It @ Sac State](#)
2. [How green is your bike?](#)  
Monfries, Richard, Australian Cyclist Sep/Oct2009, Vol. 34 Issue 5, p34 (English Abstract Available)  
Database: SPORTDiscus  
[Add to folder](#)      [Find It](#)      [Find It @ Sac State](#)

Limit your results

Linked Full Text  
 English Abstract Available  
 Peer Reviewed

Filter by Publication Date:  
1973      2009  
1973      2009  
[Update Results](#)

< Search Options

Folder has items

BIKE OF THE WEEK. ☺  
Fix Your Bike. ☺  
tech: Grape vine. ☺

[Go to: Folder View](#)

4. When ready to export Click on **Folder View**

5. Click on **Select all** and then the **Export** button

Articles  
1-2 of 2 Page: 1  
Name Sort Page Options

Select / deselect all

1. [Credit to the Bicycle.](#)  
By: Wicks, Frank. Mechanical Engineering, Jul2010, Vol. 132 Issue 7, p40-44, 5p; (AN 52251239)  
Subjects: BICYCLES; HISTORY; VEHICLES; AIRPLANES; INVENTIONS; INVENTORS; WRIGHT, Wilbur, 1867-1912; WRIGHT, Orville, 1871-1948; DRAIS, Karl Friedrich Christian Ludwig, Freiherr von Sauerbronn, 1785-1851; STARLEY, John  
Database: Academic Search Premier  
HTML Full Text PDF Full Text (2.3MB)  
[Find It](#) [Find It @ Sac State](#)  
Notes: CSUS Library subscribes to this journal.

2. [The Bicycle Helmet Attitudes Scale: Using the Health Belief Model to Predict Helmet Use Among Undergraduates.](#)  
By: Ross, Thomas P.; Ross, Lisa Thomson; Rahman, Annalise; Cataldo, Shayla. Journal of American College Health, Jul/Aug2010, Vol. 59 Issue 1, p29-36, 8p; (AN 52617066)

Print  
E-mail  
Save as File  
Export

6. Export marked items to your hard drive by clicking on the **Save** button

Export Manager  
University Library, Sacramento State  
Back

Save E-mail

Number of items to be saved: 8

Remove these items from folder after saving

Save citations to a file formatted for:  
 Direct Export to EndNote, ProCite, CITAVI, or Reference Manager  
 Direct Export to EndNote Web  
 Generic bibliographic management software  
 Citations in XML format  
 Citations in BibTeX format  
 Citations in MARC21 format  
 Direct Export to RefWorks

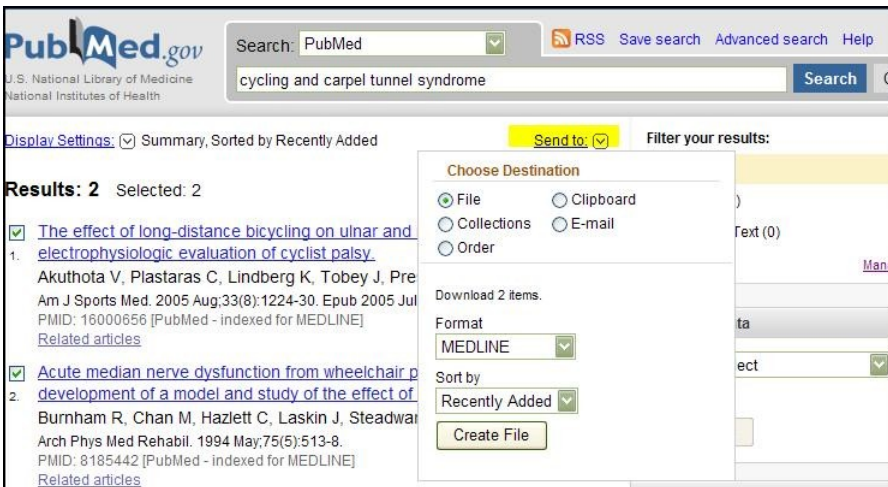
7. Your references should be in your Endnote Library.


Adding References to your Library: **Filters (for databases that don't export automatically)**

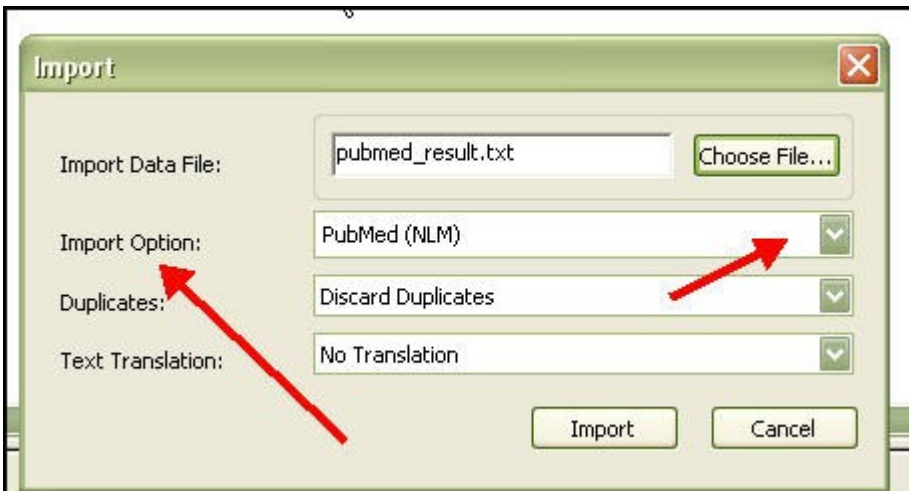
1. Open EndNote
2. Go to Database and perform search [Pubmed or any database with an available filter]
3. Save the references as a **text file** in a tagged format [Medline display in PubMed]
4. Go to EndNote and Import

## Adding References to your Library: **PUBMED**

1. Mark titles of interest
2. Click on **Send To** drop-down menu [on the right side of the screen]



3. Choose the **File** button
4. Choose the **MEDLINE** format
5. Select **Create File**
6. **Save** the file [to a place you can easily find it, desktop is a good choice, you can rename file if you like as long as it has a .txt extension]
7. Go to EndNote
8. Select **Import** [from either the **File** menu or the Import icon 
9. **Choose File** to find the file you wish to import
10. If PubMed doesn't appear in the Import Option box, use the dropdown arrow to see a list of filters. You may have to use the **Other Filters** option to find the correct database and vendor. If what you are looking for is not on any of the lists you can go to Endnote Import Filter site, <http://www.endnote.com/support/enfilters.asp> to if what you need is available for download. *See the Installing EndNote X3 Import Filters Download Instructions handout.*
11. Select the **Import** button



Adding References to your Library: **Online Search (only works with select databases, NOT RECOMMENDED)**

1. Select database from list on left side of main screen.
2. Enter search terms
3. Results will automatically populate *ALL References* and the *Unfiled* folders

Adding References to your Library: **EUREKA**

1. To get the most complete record available, including call number, you must search EUREKA using the EndNote interface (Online search), however before you can search you must download the "Connection Filter" from the EndNote support site. See the instructions, "Connection File Download Instructions" [*Eureka Library Catalog as an example*] *handout*.

Organizing Your References: **Groups**

The Left pane of the library window lists groups of saved references. These groups are used to organize the references in your library.



All References = everything in your Library

Unfiled = references that are in your Library, but not part of a group

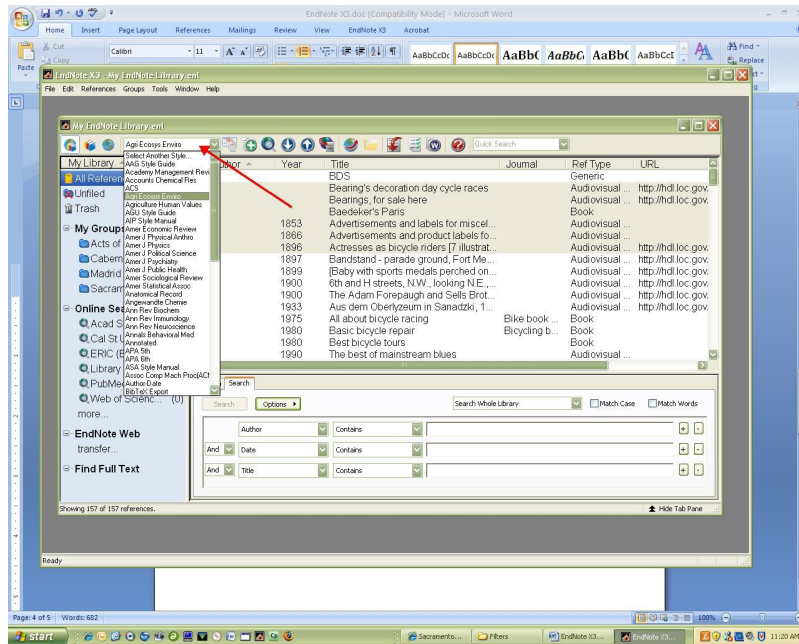
Trash = references that have been deleted from your Library, but are still retrievable

My Groups = custom groups you create to keep references organized. When you remove references from a group, they still remain in the Library

1. Click on **Groups menu** from the toolbar and choose what kind of folder you would like to create.
2. To add references to a group, either highlight reference(s) and drag and drop to the group, or highlight reference(s) and click on the Groups drop-down menu and select **Add References to ....**

## Creating a Bibliography from within Endnote

### 1. Select the format style you want



### 2. Select the references you want to include

#### Hints:

- To select all references: Click on **Edit menu** and **select all**
- To select some of the references:
  - Highlight the reference you want, hold down the CTRL key and press enter to randomly select a reference

### 3. On the **Edit** menu click on **Copy Formatted**

### 4. Paste into a word document