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**ENDNOTE X9 QUICK REFERENCE GUIDE**

DOWNLOADING ENDNOTE DESKTOP CLIENT

* Must have an ITS tagged device
* On both Macs and PCs, go to WCM App Store and download EndNote

TO USE ENDNOTE ONLINE:

* Go to [www.myendnoteweb.com](http://www.myendnoteweb.com)
* Register for an account (must be done for the first time while on WCMC wifi)

SYNCING ENDNOTE WEB AND ENDNOTE DESKTOP

* In the desktop client, go to Preferences – Sync and enter your EndNote Web email address and password.
* Check the box for "Sync Automatically" to have your libraries sync every time you open the desktop client.
* The sync process may take a while, depending on how large the library is.
* If you'd prefer to sync manually, the Sync button on the main desktop client interface (two circular arrows) syncs the two platforms.

IMPORTING REFERENCES FROM PUBMED

* In PubMed, select the references you wish to send.
* Click “Send to” > "Citation manger" at the top left of the screen, below the search box.
* Click "Create file."
* Open downloaded file. Or, in EndNote, go to File – Import – and choose the downloaded file. Make sure "PubMed (NLM)" is the selected Import Option.
* References will automatically be sorted into “Imported References” and "Unfiled."

CONVERTING A MS WORD BIBLIOGRAPHY TO ENDNOTE

* Go to <http://git.macropus.org/citation-finder/>.
* Copy and paste formatted Word bibliography.
* Choose RIS as citation format and Search.
* Select the correct citation for each reference, then select Download All Selected Citations.
* In EndNote, go to File – Import – and choose the downloaded file. Make sure "Reference Manager (RIS)" is the selected import option.

FINDING FULL TEXT

* Highlight the references for which you’d like to find full text.
* Right Click – Find Full Text
* You may be asked to authenticate through EZproxy; sign in with your CWID and password.
* On your My Library bar, a “Searching…” dialog will appear at the bottom while EndNote looks for PDFs. This might take a few minutes, depending on how many references you’ve selected.
* Once it has finished, the “Searching…” dialog will disappear, replaced with “Found PDF,” “Not found,” or "Found URL" tabs.
* References with PDFs found will have a small paper clip appear next to the entry. The full text is now attached to that entry.

REMOVING DUPLICATES

* If you’ve pulled citations from more than one location, you might have duplicate entries. To check for and remove these, go to References – Find Duplicates.
* A pop up will allow you compare suspected duplicates side-by-side, manually selecting which record to delete and which to keep.
* You can also do this by clicking “Cancel” on the side-by-side comparison pop up. The duplicates will be highlighted in your library and you can now delete them.

INSERTING ENDNOTE REFERENCES INTO A WORD DOC – "CITE WHILE YOU WRITE"

* In your Word Doc, place your cursor at the end of the sentence where you want the citation to go
* On the EndNote X9 tab in Word (Microsoft Office v2016 or later), click on "Insert Citation"
* The “Find & Insert My References” dialog box will appear. Type a keyword from the reference you want to insert (author name, publication year, etc.). Press the Return key to search.
* Find the reference you want from the list of results and click “Insert.” This creates an in-text citation as well as a final bibliography entry.
* You can change the output style of the entire document by selecting a different style from the drop-down menu on the EndNote toolbar.

CONVERTING TO PLAIN TEXT

* Before sending manuscripts to a colleague or publisher, you might want to break the connection with EndNote and remove the EndNote coding.
* On the EndNote X9 tab in Word, go to Tools – Convert to Plain Text.
* This will create a new, separate document without EndNote's markup. Your in-text citations and final bibliography will remain, but are no longer linked to EndNote. You can now make manual edits to the reference list if you choose.
* It's important to save the original document with the EndNote markup as well, so you that you can edit citations in the future if need be.

DOWNLOADING NEW CITATION STYLES

* EndNote comes with hundreds of citation styles preprogramed, but if the style you are looking for isn’t there, you can try searching and downloading from <http://endnote.com/downloads/styles>.
* Find the style you want and click “Download.” Open this file in EndNote.
* In EndNote, go to File – Save As. The style name should appear in the box, but if not you can edit it here. Click Save.
* The style should now appear in your Choose a Style list.