How to Use EndNote:
An Introductory Guide for Beginners

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Introduction

Organizing research is an ongoing challenge, and that challenge has spawned a multitude of software solutions. If you've been in the academic world for any length of time, you've likely heard of EndNote. EndNote is an app designed to help you manage and organize your research, bibliographies, and more.

If you are new to EndNote, the application can be a bit confusing. Don't worry! This guide will help you get started. We'll go over these topics:

- What EndNote is and what it is good for;
- Who will benefit most from using this application;
- Basic EndNote functions;
- Getting started with EndNote;
- And more!

What is EndNote?

To put it simply, EndNote helps you organize research.

Many people can benefit from this program. Academics who are working on research papers need tools to manage their references. Students also need these tools, as they work on theses and assignments. Researchers and librarians who sort through complex subjects also need assistance when compiling, cross-referencing, and evaluating loads of information, as do scholarly and technical writers who meticulously research and cite their sources.
That's where EndNote comes in! **EndNote is a *reference management software package*** that has four main functions:

1. **It finds the research** you are looking for using built-in search tools;
2. **It stores and organizes references**;
3. **It creates bibliographies and citations** with a few mouse clicks; and
4. **It shares your research** with colleagues, who can contribute to your work or join you in collaborative projects.

EndNote is produced by **Clarivate Analytics**, a large knowledge and information conglomerate that produces a wide variety of other products for scholarly and scientific research.

Let's learn a bit more about each of the main features of EndNote.

EndNote Features

Find

EndNote is designed to help you find scholarly information (especially research papers). You can find PDF files (including full-text documents) directly in EndNote by connecting the service to your online databases of choice. The built-in PDF reader allows you to read, annotate, and highlight research papers quickly and easily.

You can also link the app to catalogs of your choice for search functionality, so you'll find exactly what you need. EndNote can use these databases to search for and update incomplete citations in your library.

Store

Once you have the information you need, EndNote helps you store it by allowing you to gather specific types of information (links, PDFs, references, media, etc.) into an organized system.

You can also set a watch on a certain folder to automatically import PDFs, maintain existing folder structures, and automatically rename and apply metadata to files as you import them. Powerful search features let you search your entire database in seconds. You can create groups to organize your research by project or subject, and you can also create "smart groups" to automatically categorize citations and papers as they are added to your library.

Create Bibliographies

The third major function of Endnote is to create bibliographies. The app allows you to reformat your citations in any style you choose (including custom styles), and it integrates with Microsoft Word and Apple Pages so you can easily insert bibliographic citations while you write your manuscript. EndNote also makes it easy to create a CV, as you can insert and format your papers directly in your publications list.

Share Research

EndNote also has built-in sharing functions that enable your colleagues to not only read, but also edit your references and "groups" (groups allow you to clump references by subject, author, or any arbitrary category that you choose).

Other Features

Numerous additional features make EndNote even more powerful. EndNoteSync allows users to store and access their references anywhere, as your library is also stored in the Cloud. You can access your EndNote library at any time by visiting the following website: **https://www.myendnoteweb.com**.

Getting Started

Despite its power, EndNote is easy to set up and use. Here's how to do it:

Step 1: Getting Access

EndNote isn't free, although there is a 30-day free trial. EndNote is a premium app, and its price reflects that: a standard license costs USD $249.95, if purchased and downloaded online (up to USD $299.95 if you purchase the software and have it shipped to your location). Upgrading from a previous version costs from USD $99.95 (online upgrade) to USD $109.95 (software upgrade); however, many people are eligible for reduced prices. Students can receive a discount through their student bookstore or a global distribution partner (see the **EndNote website** for more details).

Some institutions purchase EndNote licenses for their faculty and receive bulk discounts. Check with your department's administration or with the IT desk at your institution to find out if your workplace is one of them. If your institution doesn't purchase bulk licenses, they might consider it – discounts are available on six licenses or more.

If you're looking for mobile access to EndNote, you can download an iPad version, but be aware that you do require an account, and it does not have all the same functionalities as functional as the desktop app.

Step 2: Open the App

Once you've purchased a license and downloaded and installed the application, it's time to set it up. It can all look confusing at first, but we'll guide you through this process. This is, after all, an EndNote guide for beginners!

When you start the application up for the first time, EndNote shows you a brief slideshow of the application's features. Click through the slideshow to get a better sense of how things work. On first launch, EndNote will also create a new library file (located in your Documents folder). This library will contain all your citations for each project and research paper that you work on.

You can create new libraries via the file menu, but we recommend keeping all your work together in one library. You can use groups to organize your different projects and interests.

Step 3: Set up Full-Text PDF Access

Now it's time to get into the settings. Open the menu and click "Preferences". On the left, you'll see a selection of categories. You can explore these at your leisure, but for now, click on "find full text".

On the right-hand side of the window, you should now see a number of options related to full-text search. You may want to uncheck the options for full-text search of the Web of Knowledge, DOI, or PubMed, but for now, let's focus on OpenURL. This is where you can paste in the access link for full-text databases associated with your institution.

In the "Authenticate with" box below, you will enter the URL that you will use to log in to these databases with your student or employee ID information. If you have any trouble with these steps, contact your department or IT specialists – they likely have this information ready to help you.

Step 4: Set up Your Library Catalog

Now is a good time to set up the library catalogs for the EndNote search function. This will make sure that you have access to the citations and research papers you are searching for, and that the subjects of your choice are covered.

At the top of the EndNote application window, you should see three small buttons grouped together. The central button looks like a globe. Click this button to access your Library. Click "More" on the left for a large list of library catalogs. You can use this list to "favorite" catalogs of your choice, which will appear on the quick-selection list on the left.

Step 5: Search and Add Your First Citation

Now that your catalog and full-text access are configured, you will see a search tool toward the top of the EndNote window that allows you to find research papers and catalog entries. Whichever catalog is selected on the left-hand side of the EndNote window will be searched based on your search terms. Note the advanced search functions that allow you to find very specific results.

After executing a search result, click on any result and click "OK" to add the document to your EndNote library. Note that you can also import any PDF files that you already have, while also maintaining existing folder structures in your groups. In addition, you can manually add references by clicking on the "Reference" drop-down menu, and then clicking on "New reference".

Step 6: In-Text Citations

If you're using Microsoft Word or Apple Pages, you can cite your work as you write. To get started, simply navigate to the EndNote toolbar, select a sentence in your paper and click, "Go to EndNote". Then, select the appropriate citation and click "Insert citation" to automatically insert an in-text reference. You can use a dropdown menu to select different styles.

Step 7: Create a Bibliography

At the end of your paper, you will be able to create a full bibliography. If you've been using groups to track the references you've been using thus far, this step is incredibly easy. First, choose the reference style you want using the "Output Style" dropdown menu. Then, select all of the citations you wish to include in the bibliography (you can do this by dragging a box around the citations, or by control/command-clicking each citation). Head to the Edit menu, then click "Copy Formatted". Then, head to your paper and hit paste (control/command-v). Your complete (and formatted) bibliography will appear.

Conclusion

EndNote is a powerful reference management system that can really streamline life for anyone dealing with heavy-duty research. While it may take a bit of time to set up, there is no question that EndNote's powerful tools will end up saving you time. We highly recommend EndNote to any academic, scientist, student, researcher, or scholarly writer.

For more help getting EndNote set up, check out the extensive library of training videos on their website, or the EndNote Frequently Asked Questions page. If you would like an expert to give you a hand with issues such as reference formatting, please inquire directly with Journal Prep at services@journalprep.com. As an add-on to your English editing service, our editors can format your manuscript for your target journal.

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Note:

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Journal Prep Services is not affiliated with Clarivate Analytics (the publisher/developer of EndNote). This is simply an introductory guide to highlight some of EndNote's useful functions. For additional details, or for official training materials, please see the official EndNote site at https://www.endnote.com