EndNote×9

Research Smarter.

Quick Reference Guide for Windows

Available on the App Store

Don't forget to download the iPad App

Clarivate
Analytics

Quick Reference Guide for Windows

What can you do with EndNote?

- Create a customized library of all your references.

- Insert those references in Word and EndNote will automatically create citations and a bibliography matching the requirements of your selected journal or style manual— and it has over 6,000 bibliographic styles to choose from!

- Attach PDFs, sound files, videos, or any other kind of file to your references—up to 45 files per reference!

- Read and annotate attached PDFs.

- Organize your library using groups to categorize references by project, subject, or anything else you choose—and the same reference can be in as many groups as you want.

- Sync your EndNote references and groups across multiple computers, share references with others, track who has made changes to references in shared libraries and when they were made, and access your references from almost anywhere with any Internet browser by logging into your EndNote online account at my.endnote.com

- And much, much more!

Insert citations
Bring citations and references directly into Microsoft Word.

Share your library
Collaborate with up to 100 other EndNote users.

Track Activity
View a history of the changes made by your shared library colleagues via an activity feed.

Search easily
Access thousands of online resources within EndNote.

Organize your references
Create groups and drag and drop your references into them, or create automatic smart groups and let EndNote take care of this for you.

Sync your library
Sync across desktop, online, and iPad®.

View and annotate your PDFs
Add sticky notes to your PDFs and search for them later. Use the built-in email functionality to quickly share a reference and its file attachments with others.

Get started with these steps

Create your EndNote library

EN EndNote X9 - [Sample_Library_X9.enl]

EN File Edit References Groups Tools Window Help

New...

Open Library...   Ctrl+O
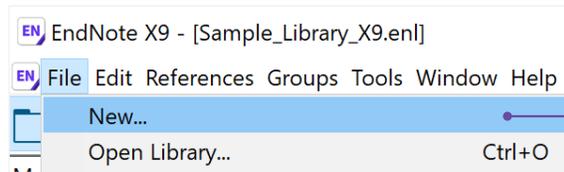
Create and save
Go to File→New. Save your library in your Documents folder. Never save EndNote libraries in cloud-syncing folders such as Dropbox or OneDrive.

Import references from online databases or your existing folders of PDFs

In online databases...
Look for options to save or download references to EndNote or in the RIS format.

☑ Select Page   5K   Save to EndNote online   ▲   Add to Marked List

Save to EndNote online
Save to EndNote desktop
☑ 1. Brain Evolution: Intelligence   Save to ResearcherID - I wrote the
By: Maler, Leonard   Save to FECYT CVN   shed: MAR 5 2018
CURRENT BIOLOGY Volume
S·F·X   Full Text from Publish   Save to InCites
Save to Other File Formats

EN EndNote X9 - [Sample_Library_X9.enl]

EN File Edit References Groups Tools Window Help

New...

Export...
Import   ›   File...
Print...   Ctrl+P   Folder...

Import PDFs
Select File→Import→Folder to import folders and subfolders of PDFs.

Organize your references into groups

⊟ Avian Intelligence
    ⦿ Avian Cognition   (31)
    ▤ Corvids   (19)
    ⦿ Corvids & Parrots   (6)
    ▤ Parrots   (24)
⊟ Bats
    ▤ Chiroptera   (22)
    ▤ Echolocation   (6)
    ⦿ Echolocation OR Sonar   (7)
    ✿ Sonar   (5)
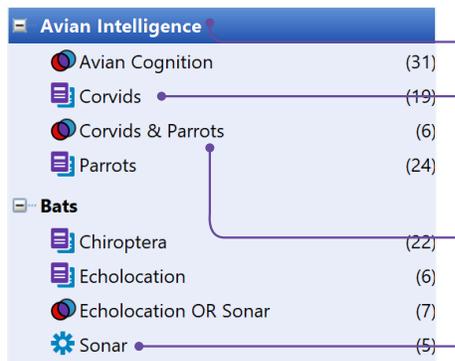
Use the Groups menu to organize your library into groups

Group sets: Groups are organized under group sets and references are organized in groups. A reference can be in as many groups and group sets as you choose, and will not be duplicated, just assigned to the category the group represents.

Custom groups: Drag references into a custom group to add them to the group.

Combination groups: Combination groups combine references from other groups and will automatically update.

Smart groups: Smart groups are based on searches and will automatically update.

Sync your desktop library to an EndNote online account and access your references anywhere

EndNote Login   ✕

Using an EndNote account makes it easy to get the latest features and keep your library in sync.
Learn more

Create a new EndNote Account
    If you don't have an EndNote account or aren't sure, then click Sign Up.   Sign Up

EndNote Account Credentials

E-mail Address: [   ]

Password: [   ]

Forgot Password

                                        OK   Cancel
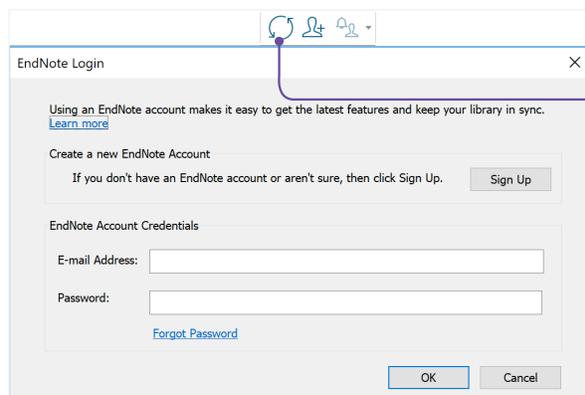
Click the Sync button to start
The Sync button will open this window where you can sign up for an EndNote online account if you don't have one, or enter your email address and pass-word if you have an account. If you already have a Web of Science or EndNote basic account, use the same logon.

After syncing, you will be able to ac-cess your library through any browser or in the EndNote iPad app. You will also be able to share references with other EndNote users.

Share your references with your entire team
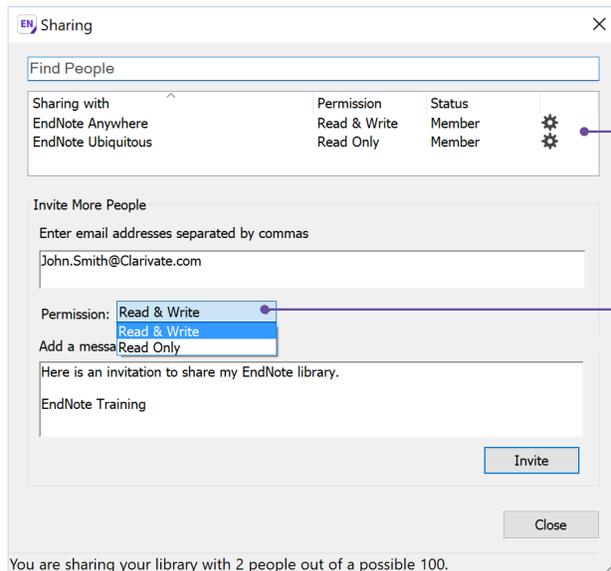
See who is sharing your library

You can share your library with up to 100 EndNote X7, X8, or X9 users. You can see a list of whom it is being shared with, change their permissions, or remove them from the list at any time.

Invite colleagues to share your library

Invite colleagues to share your entire library—and have the choice of giving them full Read & Write access or limiting them to Read Only access.

Share EndNote online groups from within your EndNote desktop library

Share custom groups

Share custom groups in your EndNote library through EndNote online without having to leave EndNote. Just right-click on a custom group and select Share Group from the menu. Note that attachments are not shared when sharing groups.

Library-sharing tools
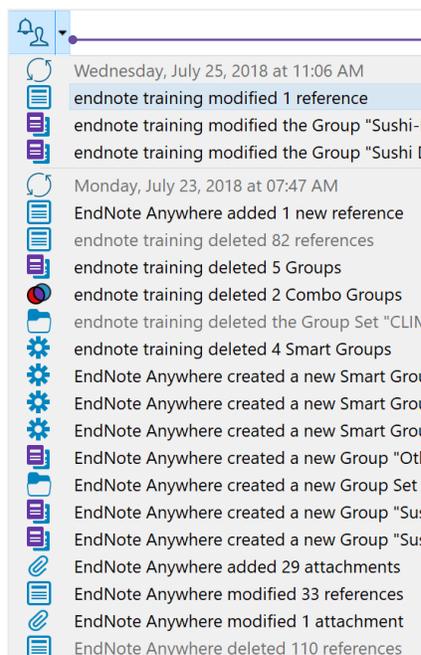
The Activity Feed

The Activity Feed shows changes made to the shared library. EndNote X8 or X9 users sharing the library can see the feed, with the name of the person who made the change and a description of the type of change made.
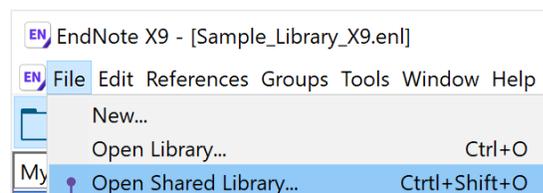
Open a library shared with you

Select Open Shared Library from the File menu to open a library that has been shared with you.

Create documents with Cite While You Write

When you install EndNote, it will search for your word processor and install the appropriate Cite While You Write (CWYW) files to let EndNote and your word processor communicate. On Windows, Cite While You Write is available for Microsoft Word, Apache OpenOffice, and LibreOffice. With Microsoft Word, you will see the EndNote X9 tools shown below in Word.

Insert Citation
Use the Insert Citation button to search for EndNote references without leaving Word.

Style
Use the Style drop-down menu to choose an EndNote style. It includes a favorites list for frequently used styles.

Instant Formatting
Turn Instant Formatting on to have citations instantly formatted, or off to insert plain-text placeholders.

EndNote X9

EN Go to EndNote	Style: APA 6th	Categorize References ▾
Edit & Manage Citation(s)	Update Citations and Bibliography	Instant Formatting is Off
Edit Library Reference(s)	Convert Citations and Bibliography ▾	

Insert Citation ▾

Export to EndNote ▾
Manuscript Matcher
Preferences

Help

Citations · Bibliography · Tools

Edit & Manage Citation(s)
Use the Edit & Manage Citation(s) button to add page numbers or make other changes to citations.

Configure Bibliography
Use the Configure Bibliography button to change the font, line spacing, style, or add a title to the bibliography.

Manuscript Matcher
Use Manuscript Matcher to find journals that may be interested in publishing your paper.

EndNote X9 Find & Insert My References

Find My References in EndNote ▾	Find	Search:	Libraries ▾

Libraries
Shared Groups

Author	Year	Title

Find & Insert My References
The Insert Citation button brings up this window, where you can choose to search either your open EndNote libraries or groups shared with you in EndNote online.

Resources

Contact technical support or search the EndNote knowledge base at: endnote.com/support

Contact the education team at: clarivate.libwizard.com/contact-training

Find more training resources on the EndNote LibGuide at: clarivate.libguides. com/endnote_training/home

Register for free EndNote classes at: clarivate. libguides.com/endnote_training/calendar

Download the EndNote Guided Tour, a written tutorial, at: clarivate.libguides. com/ld.php?content_id=42326715

Download the Little EndNote How-To Book, a reference work for common EndNote tasks, at: clarivate.libguides. com/ld.php?content_id=42104347

Watch How to Use EndNote in 6 Minutes at: youtu.be/7e6-6QkcYm0

Learn more about EndNote

Visit: endnote.com

Contact Sales: +1 800 722 1227

Join the Conversation:
twitter.com/EndNoteNews
youtube.com/EndNoteTraining

With EndNote, your research is accessible from anywhere, anytime.

Compatibility

For compatibility and system requirements visit endnote.com/ product-details/compatibility/