

## EndNote X9 can be your research assistant.

### Export and complete references.

#### 1. Transfer references from the library system to EndNote

Click the [details tab](#) of the library record > [Send to](#) > [Export RIS](#) > [OK](#) Have more than one reference to export? [Send to](#) > [Add to my account](#). Then click [My account](#) > [Saved items](#) > select them all and [Push to Export RIS](#)

#### 2. Assign a PDF auto import folder.

While you are researching, download any new PDFs you find to this folder. EndNote will automatically import them. Where possible, EndNote will find and add the basic publication information to the new reference via the Digital Object Identifier (DOI). Click [Edit](#) > [Preferences](#) > [PDF Handling](#) and tick [Enable automatic importing](#), then select your Download folder > [OK](#)

#### 3. Have EndNote create more informative PDF names.

If you add a file such as <1-s2.0-S0305748812001399-main.pdf> to your auto import folder, EndNote can attempt to rename the PDF to an author-date-title format e.g. Bendall-2013-The public life of maps.pdf You can also set your own custom renaming protocol. Click [Edit](#) > [Preferences](#) > [PDF Handling](#) > tick your preference and [OK](#)

#### 4. Ask EndNote to find any missing publication information.

If the PDF was added and only lists its file name and a DOI, EndNote can try to find and add the base publication information via the DOI.

I. Click the reference

II. Click [References](#) > [Find Reference Updates](#)

III. If anything can be found you will be presented with the additional information. Fill in blank fields or copy across additional information and save the changes.

IV. Note: sometimes EndNote matches the accession numbers from different databases and suggested a different article. Click [Skip](#)

#### 5. Ask EndNote to find the full text for articles.

You can transfer references from the Swinburne library subscribed databases, but the full text doesn't download with the basic publication information. [Select your references](#) > [References](#) > [Find Full Text](#) to search for DOI-coded references and automatically add the full text.

#### 6. Quickly correct ALL CAPS titles in references.

Highlight the title and then click the [change case](#) button in the full record.

#### 7. Sync across computers and operating systems.

Have a PC in one office and a Mac in another? Use EndNote for iPad when you're away from your office? Sync EndNote X7 with EndNote Web and each machine will automatically be kept up to date.

8. **Back up your references without effort.** EndNote Sync will automatically check for and backup any new or changed references at 15 minute intervals.

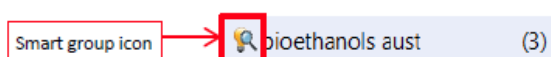
## Manage references.

### 1. Create Group Sets

Are you researching a range of topics? You can create group sets for each project or topic and create subgroups to manage the content.

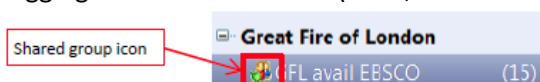
### 2. Create Smart Groups to gather new relevant references

Set up a custom search (e.g. title contains biofuels, any field contains Australia, rating three stars+) to detect and automatically collect relevant new references as they are added to your library. *(note: Smart groups do not transfer via sync – copy the contents to a standard group to enable syncing.)*



### 3. Share groups via EndNote Web and Sync

EndNote Web enables you to share a group of references with other researchers. X9 will indicate the shared folder with an icon and allow you to add further references without logging in to EndNote Web. (Note, full text is not shared due to copyright legislation)



## Create new types of bibliographies

### 1. Create section bibliographies

Previous versions of EndNote always created a single bibliography at the end of your word processor documents. X9 includes additional output style options for Microsoft Word. (Not available for OpenOffice Writer documents or format RTF files.)

You can choose to:

- Create a complete bibliography at the end of each document (the default setting for almost all of the supplied output styles).
- Create a bibliography for each section in the document (as defined in the styles APA 5th (sections) and Chicago 15th B (sections)).
- Create a bibliography for each section and also a complete bibliography at the end of the document.

Search the EndNote Help menu under Bibliographies : Sections to get detailed instructions.

**2. Create reference type bibliographies** Search the EndNote Help menu under Categories to get detailed instructions.

- Find records in databases or the library system
- Export them to EndNote
- Use EndNote to update the references – watch out for mismatches. If the Digital Object Identifier is added, EndNote is more likely to find the full text.
- Use EndNote to find and attach the full text.
- Sort the references into simple groups, or create Group sets.
- Sync your library to EndNote Web for auto-backup.
- Use Cite While You Write in Word for dynamic bibliographies

## The new research process with EndNote X9

