

ENDNOTE® FOR IPAD GETTING STARTED GUIDE

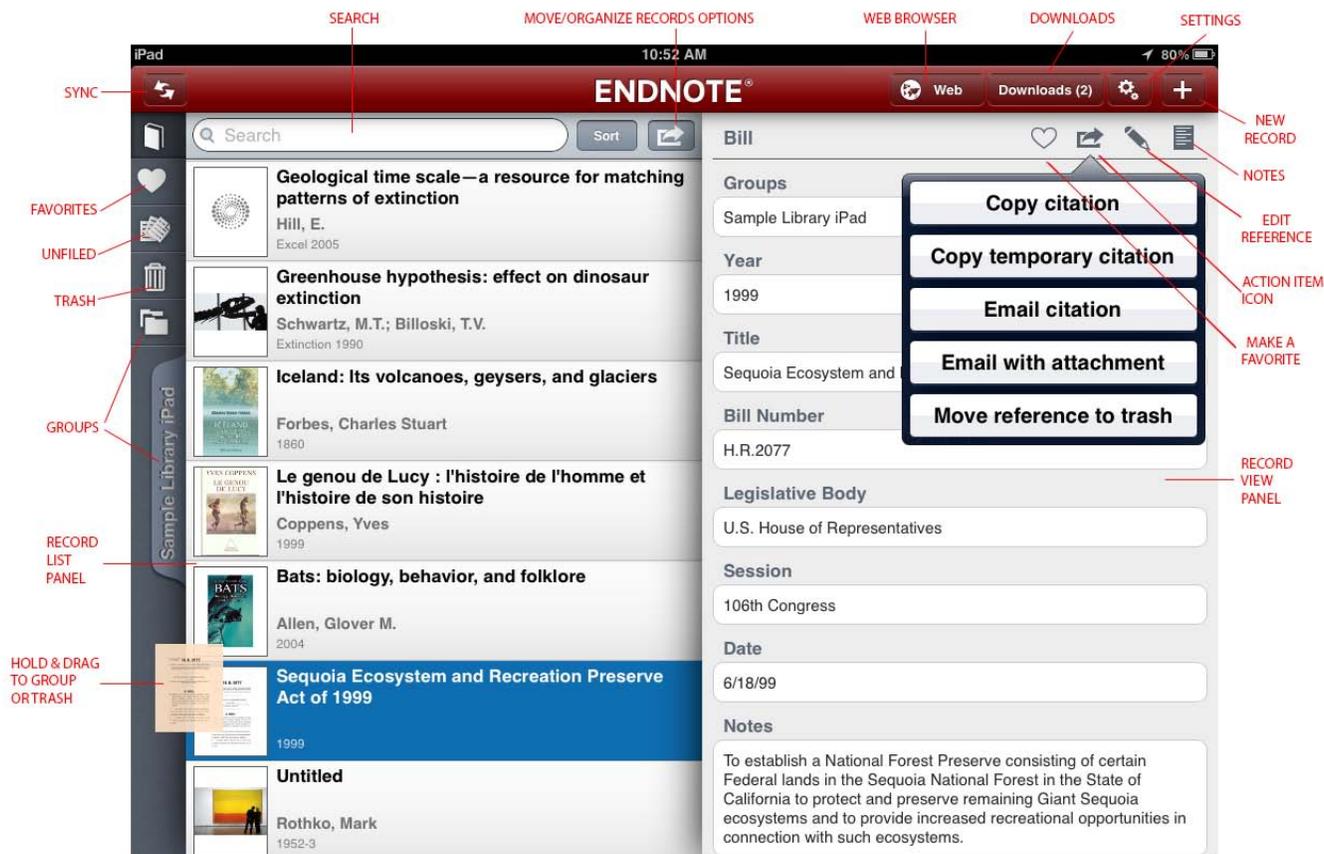
UPDATED: JANUARY 2013



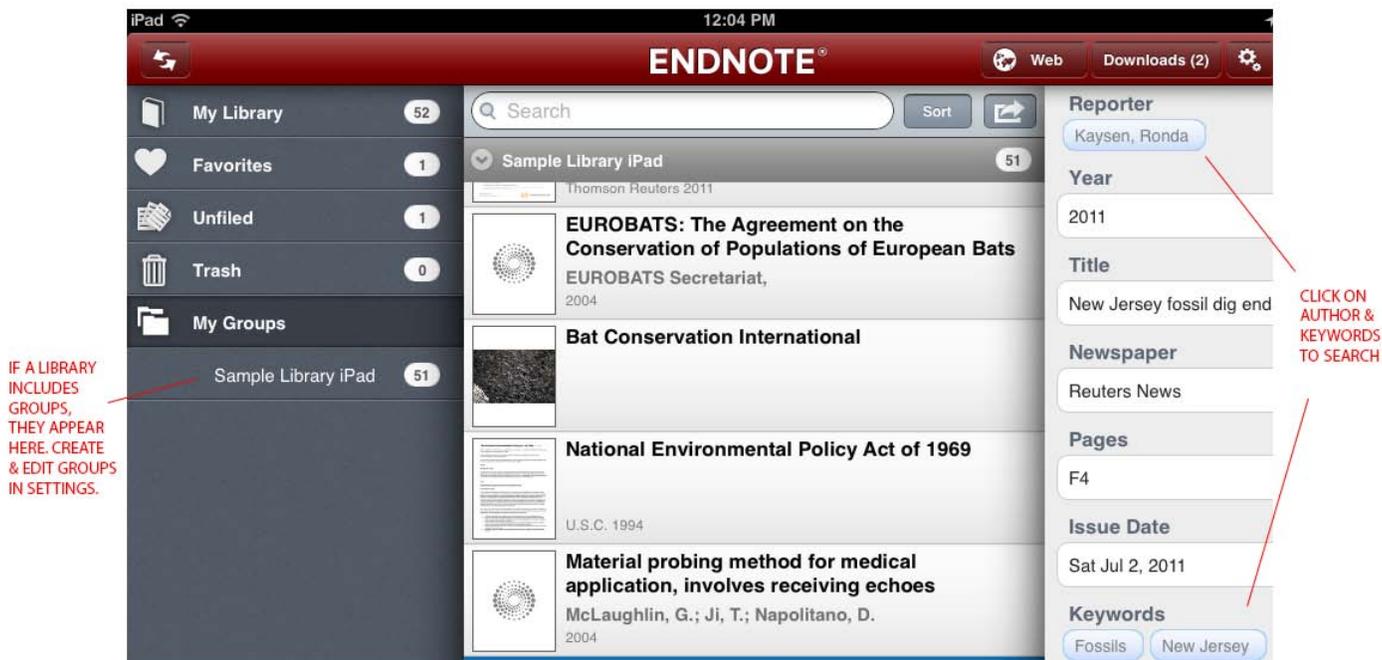
INTRODUCTION

EndNote® for iPad enables you to easily view, edit, organize, and share your research material and PDFs on iPad. Using EndNoteSync with EndNote Web and EndNote (available separately) extends the power of EndNote for iPad and allows for seamless access to your reference library from multiple devices and platforms.

ANNOTATED VIEW OF MAIN LIBRARY WINDOW & KEY FEATURES



ANNOTATED VIEW OF GROUPS PANEL & OTHER FEATURES



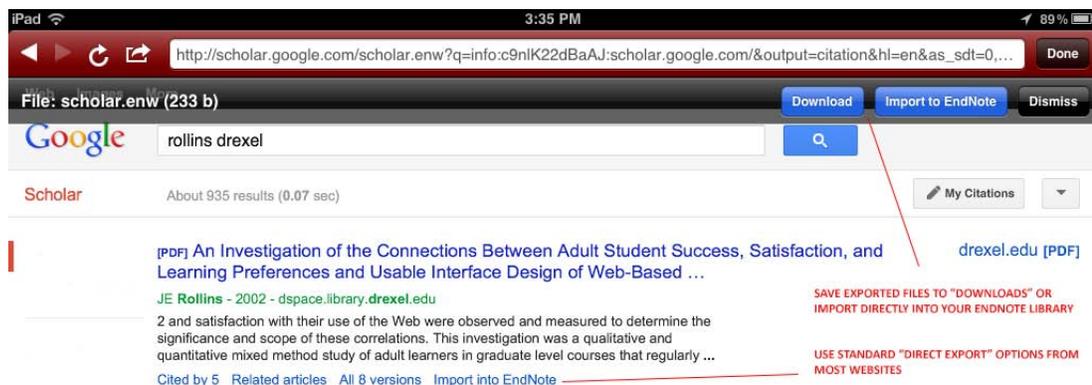
FEATURES & FUNCTIONS

ACCOUNT (ENDNOTE WEB ACCOUNT)

- Your EndNote Web account enables you to sync data to your EndNote iPad app via **EndNoteSync**.
- You can sign-up for a free Basic account from within the EndNote for iPad app.
- To sync file attachments and images, you must have an active EndNote Web account with advanced features (available separately through a purchase of EndNote for Windows or Macintosh).

BROWSER (WEB BROWSER)

- The built-in **Web** browser enables viewing most Internet sites.
- Use the **Web** button  to access this feature
- “Direct Export” functions (“Export to EndNote” or “Save to Bibliography Software”) are supported to enable import into your **Library** on iPad.
- Record URLs launch in the built-in **Web** browser.
- In **Settings**, you can change the default browser homepage.
- NOTE: Similar import functionality is supported using the Safari browser on iPad.



CITATIONS

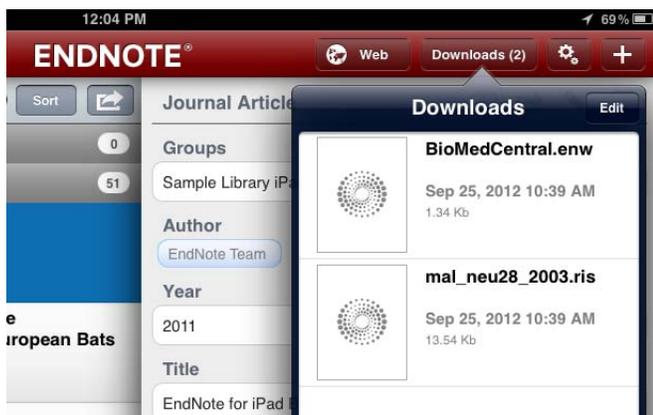
- You can copy and email citations in a default “Author-Date” citation format from the Share button in **My Library**.
- Copied citations can be pasted into other apps.
- You can also use the **Copy temporary citation** option from the Share button. This option inserts a temporary citation in the format of {First Author Last Name, Year} which can be later formatted using EndNote *Cite While You Write*® for Windows, Macintosh, or web.

CONTACT US

- You can contact the EndNote team (for Technical Support, product suggestions, or other questions) by using the **Contact Us** link in **Settings** (<http://endnote.com/ipad/contact>).

DOWNLOADS

- **Downloads** is a temporary holding place for files “Opened In...” EndNote for iPad, imported from a web browser, email, or added from iTunes®.
- From **Downloads**, you can drag and drop a file to a record and add it as an attachment.
- From **Downloads**, you can import records from .ris, .ciw, .enw, and .nbib files by tapping on them.
- Once you are done with a file on **Downloads**, you can delete it by tapping the **Edit** button and deleting the file(s) you no longer need.



DROPBOX

- EndNote for iPad enables you to add files as attachments from Dropbox. Dropbox is a popular, third party service (available separately) that allows you to store and access files from the Cloud.
- You can set up your Dropbox account connection in **Settings**.
- Once you have linked your Dropbox account, start to add a new file attachment to a reference:
 - by tapping the **Add** button  in the **Attachments** field in **Record view**.
 - or tapping on the **File Attachments** field in the **Reference Editor**.
- Either way, you arrive at the **File Attachments** dialog where you can tap the **Add** button  in the upper right-hand corner. Three options display in the pop-up menu:
 - **Add from Photos**
 - **Add from Downloads**
 - and **Add from Dropbox**.
- If you tap the **Add from Dropbox** selection, you will open a file browser that will allow you to navigate through your Dropbox folders and select a file to attach to the record.

EMAIL

- You can email citations from the **Library** and **PDF views**.
- You can email PDFs – with or without annotations – from the **PDF view**.
- You can use the “Open In...” option from Mail to add files to EndNote.

FAVORITES

- Items can be made **Favorites** by tapping the **Favorites** button ♥ on the **Record view**.
- During **Sync**, file attachments for favorites will always be available off-line.

FILE ATTACHMENTS (ATTACHMENTS)

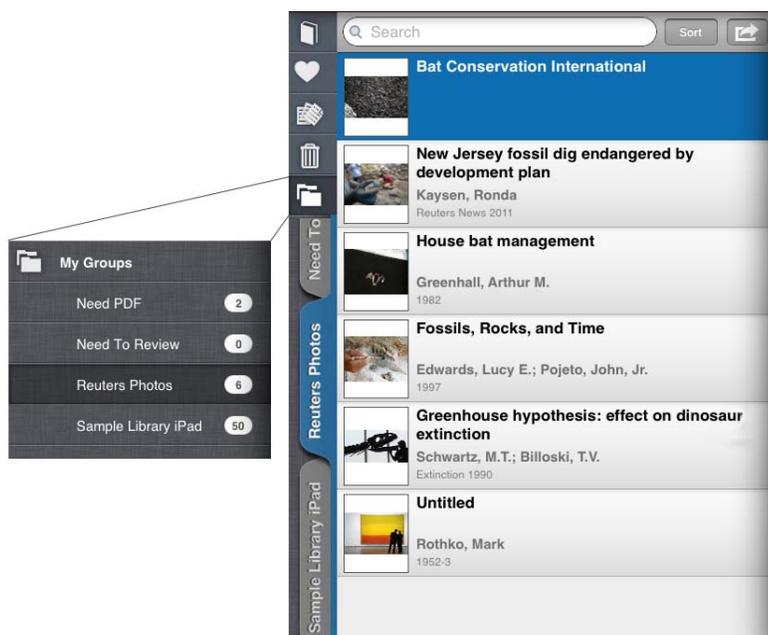
- You can add PDFs and graphics files as **Attachments**.
- Most file types supported by iOS can be used in EndNote for iPad.
- Use the “Open In...” option from Mail or another app to add files to EndNote.
- From **Downloads**, you can drag and drop files onto references as attachments.
- NOTE: files can be dragged as attachments to references in the **My Library view** only.
- NOTE: iOS controls the order of the applications that appear in the “Open In...” menu. Typically up to 10 apps are shown in the order in which they were installed on iPad.

FIGURES

- If you have graphics files attached in the **Figure** field of records in your EndNote (Macintosh, Windows, Web) library, they will sync and be displayed adjacent to any other attachments on iPad.
- **Figures** can also be added, edited, or deleted on iPad.

GROUPS

- As in the Macintosh, Windows, and Web versions of EndNote, you can organize your references into groups within **My Library**.
- From **Settings**, use the **Manage My Groups** feature to create, add, and edit groups.
- Group tabs can be dragged to reorder them.
- To quickly remove a reference from a group, drag it to the **My Library** group.
- To quickly remove a reference from all groups, drag it to the **Unfiled** group.
- Each reference can belong to as many groups as you like.
- You can edit group membership in the **Reference Editor**.
- Groups will be synchronized with EndNote for the Web, Windows, and Macintosh.



HELP

- To get help using EndNote for iPad, use the EndNote for iPad Getting Started Guide (this document).
- Or, get answers from others on the User Forum: <http://community.thomsonreuters.com/t5/EndNote/ct-p/endnote>

- Or, attend an EndNote training class. Training options are listed on <http://endnote.com>.

IMPORTING (AND GETTING DATA INTO YOUR LIBRARY ON IPAD)

- You can get data from your existing EndNote library to iPad using **EndNoteSync** with EndNote and EndNote Web.
- You can import most .ciw, .ris, .enw, and, .nbib files into your EndNote for iPad library.
- Use the “Open In...” option from Mail or another app to add files to **Downloads**. From there, you can drag and drop files onto references. The most common files and workflows are:
 - .pdf - will add to **Downloads**
 - .enw -will add to **Downloads** and attempt to import records in the file
 - .nbib - will add to **Downloads** and attempt to import records in the file
 - .ris - will add to **Downloads** and attempt to import records in the file
- You can also add files as attachments from Dropbox. You can set up your Dropbox account (available separately) connection in **Settings**.

LIBRARY (MY LIBRARY)

- EndNote for iPad supports one EndNote reference library.
- To quickly and easily populate your library, use **EndNoteSync** to bring in records and attachments from your EndNote (available separately) or EndNote Web libraries.
- When in **PDF view**, most **My Library** functions are hidden; use the **Back** button to return to the main **My Library view**.

NAVIGATION

- The **My Library** interface comprises a sliding, multi-panel design that expands with additional panels.
- To drag items in the **My Library view**, tap and hold the file/graphic/icon to move the whole reference to a **Group** or to the **Trash**.
- You can move backwards and forwards through a record list by swiping up or down past the beginning or end of a record, in the **Record view**.
- Apple iOS finger-based navigation is supported throughout the app.

NOTES

- You can type comments into the **Notes** field of references.
- To quickly access the **Notes** field, use the **Notes** button .

OPEN IN...

- Use the “Open In...” option from Mail or another app to add files to **Downloads**. From there, you can drag and drop files onto references as attachments.
- Many file types supported by iOS can be opened in EndNote for iPad but the most likely scenarios for most users are:
 - PDF files that will be added to records as attachments
 - .ciw, .enw, .nbib, and .ris files that will be imported into EndNote for iPad as records using the fielded-data.

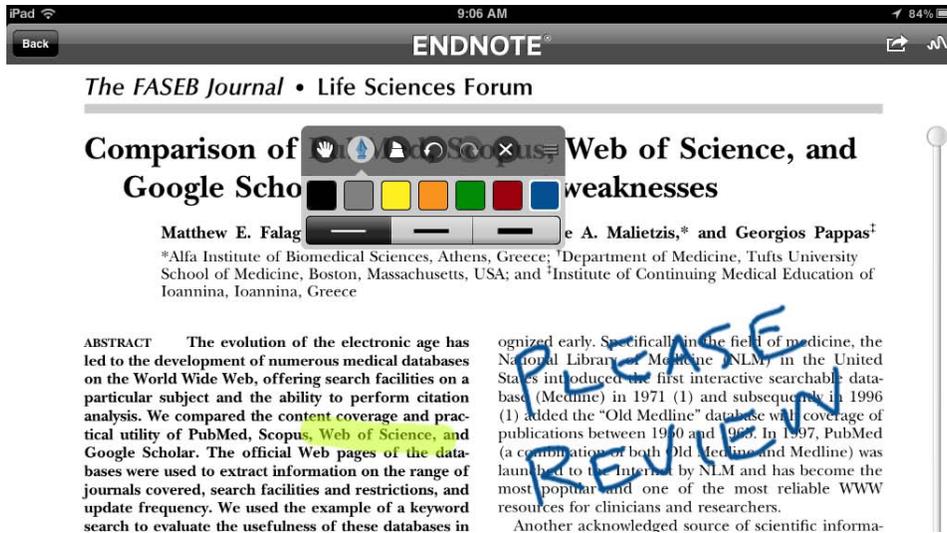


PDF VIEWER & ANNOTATIONS

- Attached PDF files can be viewed in full-screen mode.
- Most other graphic files supported by iOS can also be viewed in the **PDF View** full-screen mode.

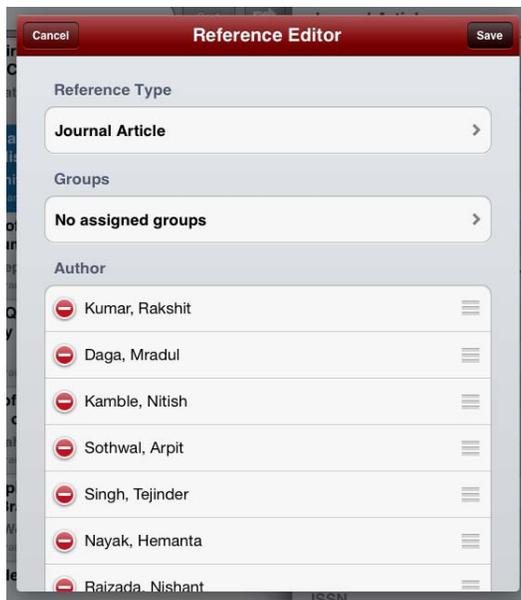
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- Graphic highlights and notes can be added to PDFs.
- PDFs can be emailed from within the full-screen mode.
- PDFs can be printed.
- PDFs can be opened in other iPad applications that support PDF files.
- NOTE: EndNote for iPad uses a technology called “freehand annotations” that cannot be synchronized or viewed in EndNote on other platforms but is retained in PDFs on the iPad device.



REFERENCES & REFERENCE EDITOR

- You can import, add manually, view, sort, delete, organize into groups, and search references in EndNote for iPad.
- Use the **Reference Editor** to create and edit references.



- Use the pencil button  to open the **Reference Editor** dialog to view and edit reference fields.
- The **Reference Editor** view includes an enhanced keyboard with rich text support and enhanced navigation.

REGISTRATION (ENDNOTE WEB ACCOUNT REGISTRATION)

- You can register for, or sign-in to, an EndNote Web account from within the app. Using EndNote Web and **EndNoteSync**, allows you to easily connect your reference library on iPad with EndNote on other platforms.

SEARCH

- You can use the **Search** field and associated options to find items in your EndNote library.
- You can limit searches to specific fields (**Title, Author, Publication**) or search everything including the text of **PDF file attachments**.
- Tap on the blue-colored **Author** names and **Keywords** to search for these items.
- **Search** results appear in the **Library view** or a new panel to the right of the currently active list/panel.

SETTINGS

- **Settings** are a standard iOS way to allow you to change basic elements of the app and set preferences for certain features.
- Use the gears button  to open the EndNote **Settings** dialog. Where you can:
 - Set or change your **EndNoteSync** account credentials
 - Add or edit reference groups using **Manage My Groups**
 - Link to a Dropbox account (available separately)
 - Set a **Homepage** for the In-App **Web Browser**
 - Review and set items related to **Anonymous Usage Data** and **Privacy Policy** and **Contact Us**.

SORT

- You can control the sort order of records in the main **Library** display using the **Sort** button.
- You can change the sort by: **Author, Date Added, Publication, Title, and Year**.

SYNC (ENDNOTESYNC)

- You can get data from your existing EndNote library onto the iPad using **EndNoteSync**.
- On iPad, **EndNoteSync** runs in the background regularly synchronizing your data with the EndNote Web server.
- You can manually invoke **EndNoteSync** by tapping the **Sync** button  at any time.
- Using **EndNoteSync**, file attachments for **favorites** will always be available off-line. Other file attachments will only be saved to iPad when they are used or needed.
- When there is a sync conflict, you will have a chance to make any necessary edits or changes to resolve it.
- Tapping the **Sync Conflict** button  displays a list of records with sync conflicts.
- Tapping on a record in the list displays the conflicted fields for that record, and allows you to elect to keep the **Local** or **Remote** version for each field.
- Sync cannot be performed again until all conflicts are resolved.



TRASH

- You can use the **Trash** to delete items from your EndNote Library.

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- To empty the trash, highlight the **Trash** group , tap the Share button, and select **Empty trash**.

WEB (ENDNOTE WEB)

- You can access your EndNote Web account directly - <http://myendnoteweb.com>.

FOR MORE INFORMATION ABOUT ENDNOTE

Visit: endnote.com

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