

Introduction to EndNote

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1. The basics

EndNote lets you store, organize and format reference information. It acts as a personal database that gathers reference information and PDF attachments in one searchable place. It also works with Microsoft Word to automatically format in-text citations and bibliographies with different output styles (JAMA, NIH, etc.).

1.1 Starting EndNote

1. New Library: **Start** → **Programs** → **EndNote** → **EndNote Program**. Click on **File** and select **New**. Name the library and **Save**.
2. This will create a program file (.enl) and a data file (.Data) for each library.
3. Both .enl and .Data files must have the same name (Test.enl and Test.Data).
4. Both files must be saved in the same location on your computer (both on your desktop or both in the same folder).
5. On Macs, when you create a new library, you can choose to save the library as a package (.enlp). This combines the two files into a single file.
 - a. **NOTE:** If you plan to share the file with someone who has a PC, you should not send a package (.enlp). Send the .enl and .Data files OR compress the files into a single, zipped file (.enlx).
 - b. See section 5 for instructions on compressing a library.

1.2 Importing Terms Lists

1. The first time you use EN after an install or update, you must import terms lists. Terms lists: journal full names and journal abbreviations.

This downloads ~9,000 medical journal titles and their abbreviations so an output style can use the full or abbreviated journal name in the bibliography.

Marino M, Huang P, Malkmus S, et al. Development and validation of an automated system for detection and assessment of scratching in the rodent. *J Neurosci Methods*. Oct 15 2012;211(1):1-10. [JAMA style]

Marino, M., Huang, P., Malkmus, S., Robertshaw, E., Mac, E. A., Shatterman, Y., & Yaksh, T. L. (2012). Development and validation of an automated system for detection and assessment of scratching in the rodent. *Journal of Neuroscience Methods*, 211(1), 1-10. [APA style]

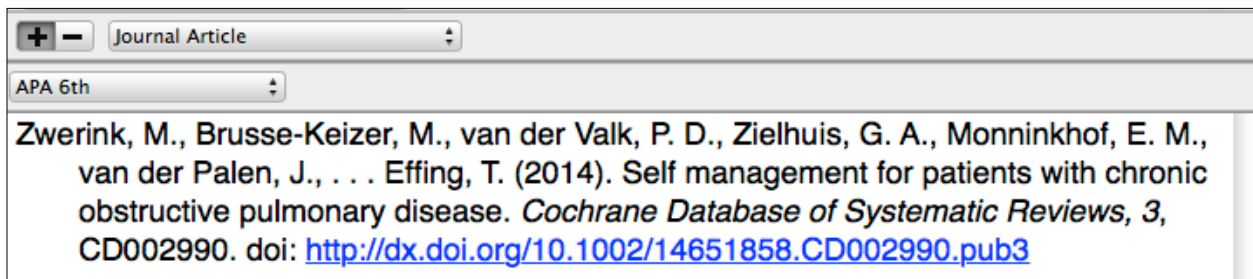
- a. **Tools** → **Open Terms List** → **Journals Terms List**
- b. Select the **Lists** tab.
- c. Select **Journals** → **Import List** button on right.
- d. Locate your EndNote program on your computer (e.g., **Program Files** → **Endnote** folder)

- e. In the **EndNote** folder, locate the **Term Lists** folder.
- f. In the Term List folder, select **Medical.txt** → **Open**.

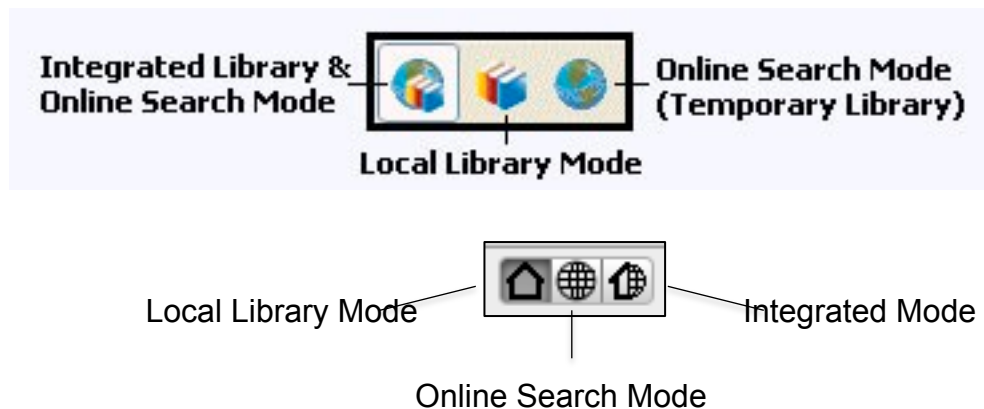
1.3 Viewing records: the library window

The library window displays all references in a library. You can edit which pieces of record information are displayed, change text within a record and adjust the output style.

1. Display fields
 - a. Change the library window: PC: **Edit** → **Preferences** → **Display Fields**. Mac: **EndNote** → **Preferences** → **Display Fields**.
 - b. Mac: add desired field; in the library window, drag column where you want it.
 - c. PC: Move fields down the list to insert one at the beginning
2. Preview an output style
 - a. To see how a reference displays in a given output style, select a style from the drop-down menu.
 - b. If you want to view the abstract with the reference, select “Annotated” as your output style.



3. Change Modes

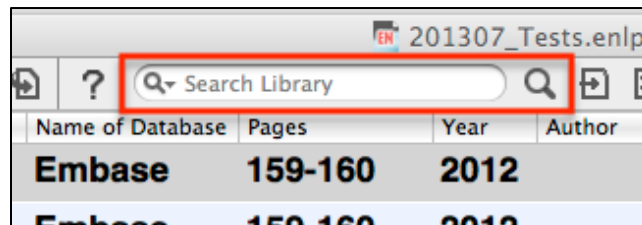


- a. **Integrated Mode** – Displays your references and lets you search online resources (ie PubMed). NOT recommended to use when searching; all search results will automatically be put in your library.
- b. **Local Library Mode** – Displays your references only; cannot search online.
- c. **Online Search Mode** – Displays online search results only. You select the references of interest and copy them to your local library. **This is the RECOMMENDED mode to use when searching online databases.**

1.4 Finding & opening references

1. Search for a specific reference
 - a. Click in the search box next to the magnifying glass icon.
 - b. Enter a word or phrase.
 - c. This will search all fields (ie, title, abstract, author) of all records.
 - d. To perform a more specific search, click on the large magnifying glass icon to the right of the search box (Macs) or select **Show Search Panel** (PCs).

Mac:



PC:



2. Open and edit a reference
 - a. Double-click on a reference to open it.
 - b. You can edit any field by typing or deleting characters.

2. Adding references and removing duplicates

2.1 Creating a new reference from scratch

If you can't import a reference from PubMed, you can add it by hand. This often happens with non-standard materials like book chapters, reports or websites.

1. Click **References** → **New Reference**. An empty Reference window will open.
2. Click the **Reference Type** list and choose the appropriate option.
3. Enter key information you think would be used to format the reference in the bibliography. **You don't have to enter information in all fields.**
4. Do not add punctuation or text styles such as bold or italic.
5. **Tips for entering author names:**
 - a. Author names can be entered either "First Middle Last" (Carol Margaret Jacobson) or "Last, First Middle" (Jacobson, Carol Margaret).
 - b. Organizational or corporate authors should be entered followed by a comma (American Diabetes Association,).
 - c. Enter only one author name per line.
 - d. As you type, EndNote suggests names that are already in your library. Press TAB to accept a suggested name and move to the next field.
6. When done, go to **File** → **Save** (CTRL+S) and close the reference window.
7. Preview your new record in the preview window to see that you filled in enough information.

2.2 Creating a record for a figure

If you have a table or figure in your paper, EndNote can format the image according to your citation style. NOTE: 1) **Many publishers request figures to be submitted separately. If this is the case, don't use EndNote to format them.** 2) For multiple figures, create a separate record for each item.


1. Click on **References** → **New Reference** (CTRL+N).
2. Click the **Reference Type**. Select the type of image you want to manage:
 - a. Select the **Figure** reference type for pictures.
 - b. Select the **Chart or Table** reference type for charts and graphs.
3. Fill in the text fields.
4. Select **Reference** → **Figure** → **Attach Figure**.
5. Locate the graphic file in the **Attach Figure** dialog box and select **Choose** to insert into the **Figure** field of your record.

6. Provide text in the **Caption** field. This text will label the graphic in the figure list at the end of the Word document.
7. Save and close the reference.
8. **NOTE:** Each EndNote reference can contain only one graphic or file attachment in the Figure field.

2.2 Importing records from PubMed (from your EndNote library)

1. Make sure you are in the **Online Search Mode** by clicking on the world icon in the upper left corner. This will prevent PubMed search results from automatically downloading to your local library.
2. In the left-hand panel, select **PubMed**.
3. Enter your search in one of the search boxes, noting which field you are searching (author, title, year, etc.)
4. You can search up to 10 fields at a time. Click on the 'plus' sign next to the search box to search more fields.
 - a. **Ex)** Find articles by Dr. Iseman with tuberculosis or tubercular in the title.
 - b. In the Author box, enter *iseman*.
 - c. In the Title box, enter *tubercul** (The asterisk* catches any variants of the root *tubercul-* ie, tuberculosis or tubercular).
5. Click **Search**.
4. A dialog box will display the number of references that match your search request and gives you the option to retrieve them. Select OK.
5. The references appear in the **Reference List Pane**.
6. Highlight the references you wish to add to your Local Library.
 - a. To select consecutive references, click on the first reference, hold the SHIFT key, and click on the last reference.
 - b. To select non-adjacent references, hold the CTRL or COMMAND (Macs) key when clicking on references.
7. With the references selected, either:
 - a. Right-click and select **Copy references to** → select the name of your EN library, eg **Test.enl**.
 - b. Or, click on the "Copy to Local Library" icon on the toolbar.

i. Macs: 

ii. PCs: 

2.3 Importing records from PubMed (from the PM website)

1. If you're in the PubMed database, you can export results to EndNote.

2. Select citations in the results list that you wish to export.
3. In the **Send to** menu, select **File**, under “Format” select **Medline**, click the **Create File** button.
4. Your browser will automatically download the citation as a pubmed.txt text file.
5. In EndNote, go to **File → Import**.
6. Find the downloaded file. For **Import Options**, select **PubMed (NLM)**. **Import**.
7. If you don't see PubMed (NLM) as an option, select **Other filters** and browse for it from the list of available filters.
8. Imported references will appear in a temporary **Imported References** file in the left-hand panel.

2.4 Importing records from Medline, Cochrane or Embase

1. If you're in one of the library's databases, ie Medline, Cochrane or Embase, you can export references to EndNote.
2. Select citations in the results list.
3. Select **Export to EndNote, and Complete Record**.
4. Click on the **Export Citation(s)** button. A dialog box will appear, asking you to save the file. Save it in an easily accessible place ie your Desktop.
5. In EndNote, go to **File → Import**.
6. Select the file you just saved. For **Import Options**, select the name of the database you were using, eg Medline (Ovid SP). **Import**.
7. If you don't see your database listed under the **Import Options**, select **Other filters** and browse for it from the list of available filters.
8. Imported references will appear in a temporary **Imported References** file in the left-hand panel.

2.5 Removing duplicate records

Usually, it's best only keep one EN record for a given citation. This avoids confusion if you ever need to edit a record or track the number of unique citations in a library or set.

1. To remove duplicates from a Group:
 - a. Click on the **Group** you wish to remove duplicates from.
 - b. Select **References → Find Duplicates**.
 - c. In the window, choose the record you wish to keep by selecting **Keep this Record**. This will discard the other record.
 - d. If many duplicates were found, it's easiest to select **Cancel**.

- e. All duplicates will be highlighted.
 - f. Drag and drop the highlighted references into the **Trash**. Or, right-click and select **Move References to Trash**. Or, hit the **delete** key on your keyboard.
2. To remove duplicates from your entire library:
 - a. Click on **All References** in the left-hand panel.
 - b. Follow Steps 2-6 above.

NOTE: If you have records organized in multiple groups, discarding a duplicate in one group will automatically discard it from your other groups.

3. Managing references: groups, group sets, smart groups, and customized fields

3.1 Group sets

Think of a group set as a higher level folder. It is like a filing cabinet drawer that contains folders or groups.

1. Click **Group → Create Group Set**.
2. Enter a name for the new group set.
3. You can drag groups to move them from other group sets to the new group set, or you can create new custom groups and/or smart groups under the new heading.

3.2 Groups

1. Click **Groups → Create Group**.
2. Type your new group name, and press **Enter**.
3. To move references to your new group, press **CTRL** and click on the desired references, then drag the reference and drop in the new group.
4. **NOTES:**
 - a. The same reference can be in multiple groups.
 - b. Deleting a group does not delete the references in that group. When the group is deleted, the references are returned to your default (**All References**) group.

3.3 Smart groups

Smart groups are built from search strategies. Example: you can create a smart group that searches all titles for 'cystic fibrosis' and automatically puts them in a group. Smart groups are automatically updated when you add references to your library

3.4 Customizing fields for special projects

You may create your own index fields that "tag" different records with text. Example: You can create a field to indicate whether a paper was presented at a conference. You could call this field "Conference" and type the name and date of the presentation. There is a maximum of six customized fields per record.

1. From the **Edit** menu, choose **Preferences**.
2. Click the **Reference Types** option in the list of preferences.
3. Click the **Modify Reference Types** button and the Reference Types table will open. Each column in the table represents a different type of reference. The rows correspond to the 40 possible fields that each reference type can contain.
4. Scroll to the **Custom 1** field of the Journal Article reference type column and type Projects. Repeat for other reference types for which you want to include a projects field.

4. Attaching PDFs to EndNote records

A PDF file of a full text article can be stored with an EndNote reference. All attached PDFs and images are stored in the **Data** folder.

4.1 You have the PDF(s) on your computer

1. Manual method: EndNote X2-7
 - a. Find the record that matches the saved PDF file.
 - b. Drag and drop the PDF onto the reference in your EndNote library.
 - c. To open, read or print the article, open the reference, then click on the pdf.
2. Automated method: EndNote X4-7

Versions X4 and later allow you to upload PDFs from your computer and automatically create references for each PDF. Use this feature if: a) you don't have a record in your library that corresponds to the PDF; or b) you have a folder of PDFs that you want to upload quickly. **NOTE:** This works best with articles downloaded from electronic publishers' sites; it doesn't work well with scanned articles.

- a. **File** → **Import File** → select the file or folder of PDFs → **Open**.
Select **PDF import** from the **Import Option** list. **Import**.

4.2 You don't have the PDF(s) on your computer

EndNote X2-7: Endnote can connect to the library's full-text holdings and download full text files for you. **NOTE:** this works best on campus.

1. Configure your preferences for Find Full Text using NJH Library's holdings
 - a. **Edit** → **Preferences** → **Find Full Text**.
 - b. Next to "Open URL Path," type
<http://nationaljewishhealth.worldcat.org/openurlresolver/> (This is the URL from NJH Library's "Journals/eBooks" webpage.)
 - c. Click **Save**.
2. Configure your preferences for Find Full Text using UC Denver's Library
 - a. Go to the UCD-HSL Find Journals page (link is below).
 - b. Copy and paste the URL <http://dy3uq8jh2v.search.serialssolutions.com/> into EN's **Open URL Path**
 - c. Search for any journal (e.g. Nano Letters)
 - d. Click on the supplier link to get to the Off Campus Login page.
 - e. Copy and paste this page's URL into **Authenticate Search Box** (e.g. <https://hsl-ezproxy.ucdenver.edu/login?url=http://pubs.acs.org/loi/nalefd>)
 - f. Click **Save**.
3. To find and retrieve full text:
 - a. Highlight the references you want to add full text to.
 - b. Select **References** → **Find Full Text**.

5. Sharing your EndNote library

The best way to share your library is to **compress** it. This combines the .enl and .Data files into a single, smaller file that can be emailed or saved to a flash drive. Remember: you **MUST** send both .enl and .Data files (or a single compressed file) in order for the library to be viewable!

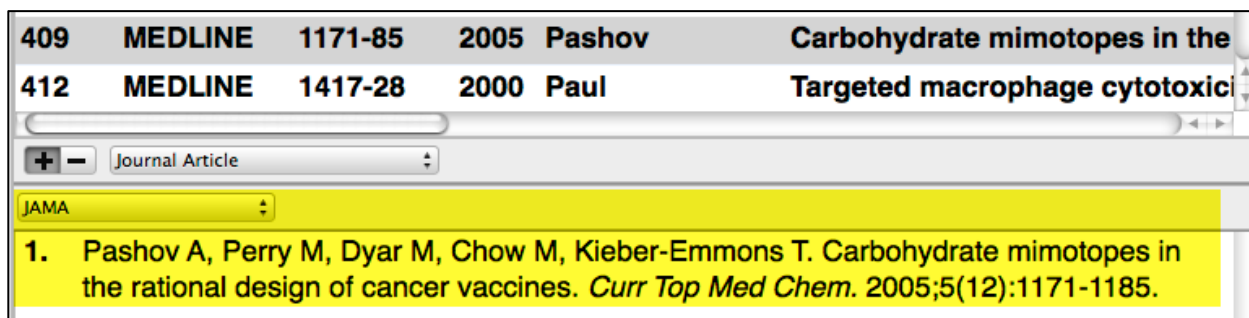
1. Click **File** → **Compressed Library**.
2. You'll have the option of compressing the entire library or just a group.
3. Name the compressed library. Click **Save**.
4. When opening a compressed file, move the .enlx file to your computer. Double-click on it. A .enl file and .Data folder will be created.

6. Customizing output styles

Every output style in EN (ie JAMA, NLM, APA) contains formatting code for the in-text citation and the reference list. You can edit the format of an existing style or create new styles from scratch.

6.1 Changing an existing output style

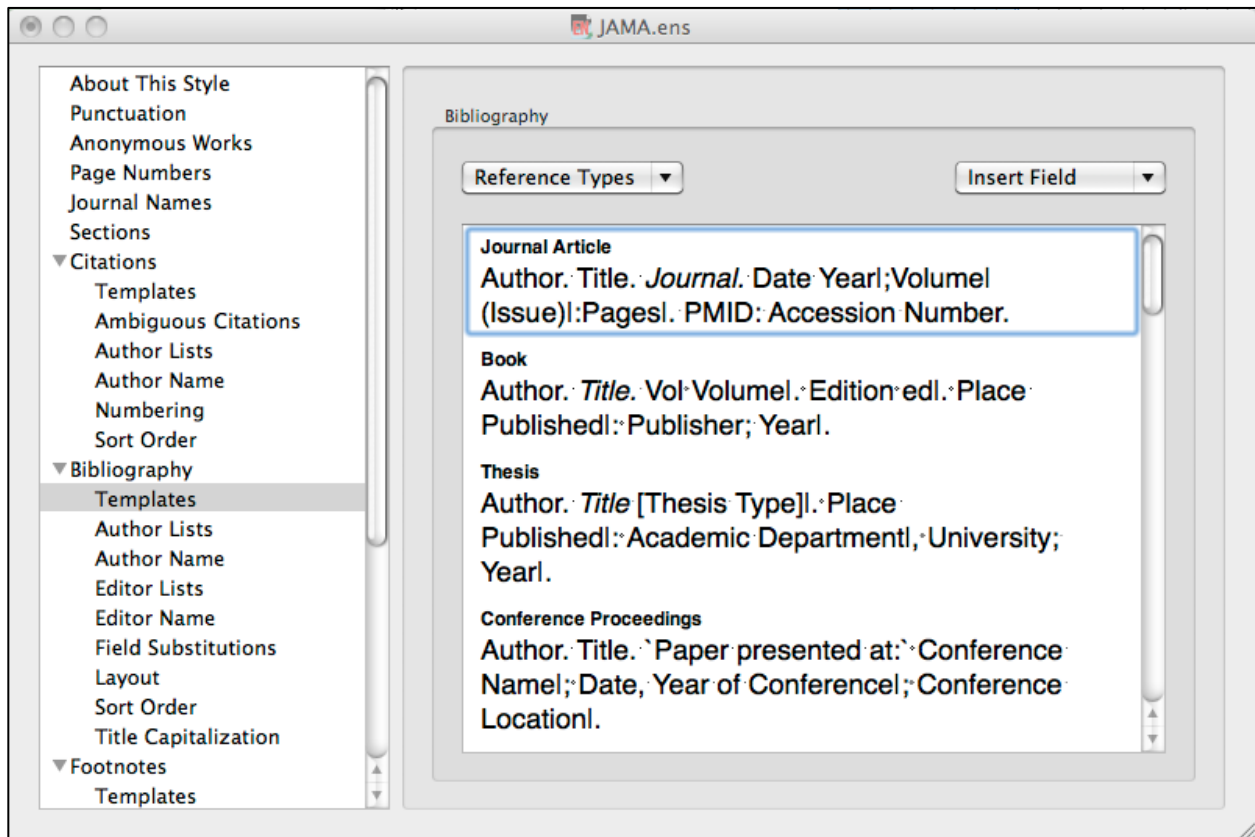
1. Use the preview pane to see the bibliographic formatting of a reference. In EN X6, this is directly below the record list pane.
 - a. This is an example of what the 2005 Pashov reference looks like in JAMA style.



- b. Example: You want to add the PMID number at the end of each reference, in your bibliography.
 - i. Go to **Edit** → **Output Styles** → **Edit "JAMA"**
 - ii. A window with information on the JAMA style will appear.
 - iii. In the left panel, under **Bibliography**, click on **Templates**.
 - iv. Formatting for different reference types (ie Books, Journals, Theses) is provided.
 - v. Under **Journal Article**, we want to make changes.
 1. Click in the space at the end of the citation.
 2. Type one space, the text *PMID*, a colon and another space (*PMID:*)
 3. Use the **Insert Field** drop-down box in the upper right to

select **Accession Number** (this is an article's unique identifier; in PubMed, the unique identifier is the PMID).

4. Add a period.



5. Save the new style. **File** → **Save As** and give the style a new name, ie 'JAMA PMID.' Close the output style window.
6. To preview your new style, select the drop-down window in the preview pane, labeled JAMA (or whatever style you last used).
7. Choose **Select Another Style...**
8. Find **JAMA PMID** → **Choose**.
9. The JAMA PMID style will now display in your output style favorites.

2. To edit the formatting of **in-text citations**, to **add numbering** to your reference list, to **change the number of authors displayed** for each citation, and more, use the **Edit** → **Output Style** command and navigate to the appropriate section in the left-panel of the output style window that appears.

6.2 Adding a new output style from scratch

1. Go to **Edit** → **Output Styles** → **New Style**.
2. You must provide **Citation Template** and **Bibliography Template** information.

- Beyond that, all specifications are optional.
- When you're finished, save your style, **File** → **Save As**, and give it a new name.

7: EndNote and MS Word – the basics

To insert citations and create bibliographies in Word, EN uses a tool called **Cite While You Write (CWYW)**. To ensure CWYW will function properly with Word, check the compatibility of your versions.

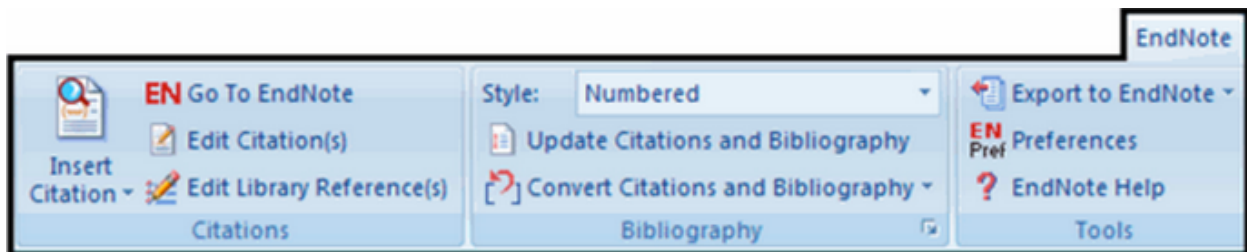
WINDOWS						MAC					
Word Processor	X7	X6	X5	X4	Online	Word Processor	X7	X6	X5	X4	Online
MS Word 2013	√	-	-	-	√	MS Word 2011	√	√	√	-	√
MS Word 2010	√	√	√	√	√	MS Word 2008	√	√	√	√	√
MS Word 2007	√	√	√	√	√	MS Word 2004	-	-	√	√	-
MS Word 2003	-	√	√	√	-	Apple Pages '09	√	√	√	√	-
MS Word 2002 and earlier	-	-	-	-	-						
Apache OpenOffice 3.X	√	√	√	√	-						
Wolfram Mathematica 8	√	√	√	√	-						
Word Perfect (All)	M	M	M	M	-						

C = Cite While You Write compatible M = More Information Available. Please see the section entitled "Scanning and Formatting RTF Files" in EndNote's Help system. - = Cite While You Write not supported except using Format Paper Feature on unformatted documents saved in .RTF format.

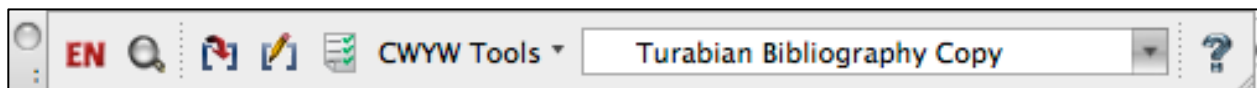
Find earlier version-compatibility at <http://endnote.com/en/requirements>

7.1 Insert citations into a Word document

- Have your EN library with the citations you want to insert AND Word open.
- For PCs, EN commands are available in an EndNote tab.



- For Macs, EN commands are in a toolbar or under **Tools** → **EndNote**. To view the toolbar, **View** → **Toolbars** → **EndNote X6**.

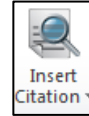


- In your document, position the cursor where your in-text citation would start (if

your style uses superscripts, this would be after the period; if your style uses an author/date format, this would be just before the period).

a. **PCs**

- i. In the EN tab, click on the little black arrow under **Insert Citation**

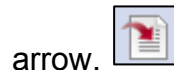


→ **Find Citation** to search for a citation.

- ii. Example: search “critically ill”. You may select more than one citation by holding the CTRL key and clicking on each citation.

OR

- i. In EndNote, highlight the citation(s) you want to insert.
- ii. Click on the icon at the top of the EndNote window with the red



arrow.

OR

- i. In EndNote, highlight the citation(s) you want to insert.
- ii. In Word, under the **Endnote tab**, click the little black arrow under **Insert Citations** → **Insert Selected Citation(s)**.

OR

- i. Highlight a citation and drag it into Word.

b. **Macs**

- i. Go to **View** → **Toolbars** → **EndNote X6** → **Find Citation(s)** or

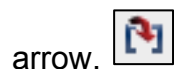


click on the magnifying glass icon in the EN toolbar

- ii. Enter a keyword or author name to find the reference of interest.
- iii. You may select more than one citation by holding the CTRL key and clicking on each citation.
- iv. Select **Insert Citation**.

OR

- i. In EndNote, highlight the citation(s) you want to insert.
- ii. Click on the icon at the top of the EndNote window with the red



arrow.

OR

- i. In EndNote, highlight the citation(s) you want to insert.
- ii. In Word, Select **View** → **Toolbars** → **EndNote X6** → **Insert**

Selected Citation(s) or click on the red arrow icon in the EN

toolbar 

OR

- i. Highlight a citation and drag it into Word.
5. After an in-text citation is added, if you need to go back and insert another reference within the same in-text citation, move your cursor **inside the bracket** or parenthetical and use an insert command outlined above.

7.2 Move or delete citations in Word

Citations can only be deleted at the point of insertion. This will prompt a re-ordering of your bibliography.

1. Find the reference where it occurs in the text of your paper, ie the superscript number, parenthetical reference or unformatted citation.
2. Highlight and delete.
3. If you're moving a paragraph or sentence that contains a reference, be sure to highlight the **entire** citation before cutting or copying.
4. The numbering of all citations and their corresponding order in your bibliography will automatically update.

7.3 Create a bibliography


1. PCs

a. In Word select the **Endnote tab** → **Update Citations and Bibliography**.

b. Be sure that the appropriate **Style** is selected. 

c. If the style of interest is not listed, click **Select Another Style** → choose the style you need (example: find 'BMC Biochemistry')

2. Macs

a. In the EN toolbar, click on the icon with green check-marks 

b. Be sure that the appropriate **Style** is selected.

c. If the style of interest is not listed, click **Select Another Style** → choose the style you need (example: find 'BMC Biochemistry')

OR

a. **Tools** → **EndNote X6** → **Update Citations and Bibliography**

7.4 Create a reference list without in-text citations

Sometimes, it's helpful to create a list of references in a uniform style to email to a colleague or insert into a document without the associated in-text citations. This is a great way to produce a list of citations and abstracts, for example, using the **Annotated Style**.

1. In EndNote, highlight the references you wish to format into a bibliography.
2. Be sure the output style in the drop-down **Style Menu** box is the style you want to use.
3. Right-click your references (on Macs, command + click) and select **Copy Formatted**.
4. In a blank document or email, **Paste**.
5. The references you selected will be pasted in the indicated output style.

8. EndNote and MS Word – sharing documents

8.1 Sending a manuscript to an editor or publisher

In most cases, you cannot send a manuscript to a publisher with EndNote codes displaying. You must convert your document to plain text first.

1. **Endnote → Convert Citations & Bibliography → Convert to Plain Text**
2. You will be prompted to save a new copy. Name and send the copy.
3. **NOTE:** When your document is converted to plain text, field codes are removed and your document is no longer linked to EndNote. Any subsequent changes to references in EN will not be reflected in the document. **Always save a copy of the EndNote-coded document so you can make future changes.**

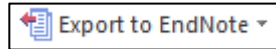
8.2 Sending a manuscript to a colleague (who also has EndNote)

If you're collaborating with another person on a paper, and both of you have EndNote, you can send a coded Word document to you colleague. Your colleague must also have the **corresponding EndNote library** with references cited in the paper, so he/she can edit the document and add/remove references as needed.

1. A **Traveling Library** is an EndNote file that contains all references used in a specific document. You create a Traveling Library from MS Word.

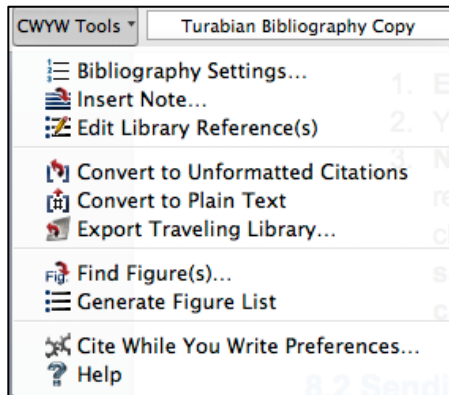
2. PCs

- a. In the EN tab, **Export to EndNote** → **Export Traveling Library**.



3. Macs

- a. **Tools** → **EndNote X6** → **Export Traveling Library**. Or, in the EN toolbar, click on **CWYW Tools** → **Export Traveling Library**.



- b. Name and save the new library.
- c. In EndNote, your new traveling library should now open.
- d. Next, you need to **compress** the .enl and .Data files to email to your colleague.
- e. In EN, go to **File** → **Compressed Library**.
- f. Name the file, save it, attach it to an email.

NOTES:

GLOSSARY:

Bibliography (aka, reference list): the ordered list of references at the end of a paper

Citation (aka in-text citation): the notation within the text of a document—usually numbered or by author’s last name—that refers readers to the bibliography

EndNote Library (aka EndNote file): a file that contains records to be formatted in a text-editing program; contains two parts—a .enl file and a .Data folder; on Macs, the library can also be saved as a “package” or .enlp, which contains both .enl and .Data components in one package.

Full text (aka PDF attachment): When you import records from PubMed or other databases, you are only importing the abstract and citation information. If you want to attach the full article, you must do that separately.

Output style (aka publication style or citation format): the publication-specific format that dictates how references appear in the bibliography.

Record (aka, reference or entry): an individual reference in your EndNote library. There are several different types of records, eg book chapters, articles, websites, organizational reports, etc.