

Introduction to EndNote X7

Training Notes (ver 1)

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HELP?

- The Help function can also provide assistance by clicking on Help on the menu.
- The extended list of import filters, connection files and output styles can be downloaded from www.endnote.com. This includes connection files for a number of local University Library catalogues.
- Monash University preferred Harvard style, and a superior Vancouver style can be found at : <http://www.library.uq.edu.au/research-support/output-styles>

1. CREATING A NEW ENDNOTE LIBRARY

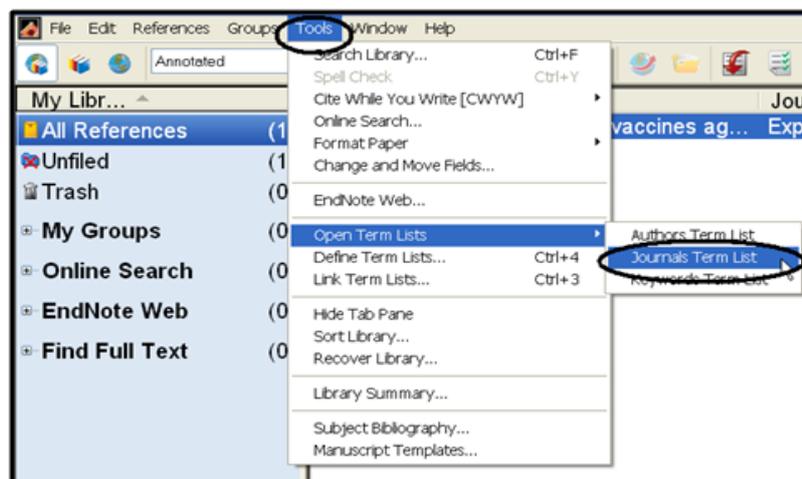
1. Start the EndNote Program.
2. Select the top option **Create a new EndNote Library**, OK.
3. Create the name of your library, and choose location to save.



2. JOURNAL TERMS LIST

To help EndNote correctly abbreviate Journal names it is useful to download the Medical journal “Term Lists” when creating a new EndNote Library.

1. From the Tools menu, select **Open Term Lists**
2. Click on the **Journal Term List**, and select the **Lists** tab.
3. From the box select **Import list**.
4. Find the Term List directory which is located in the EndNote program folder ie c:\Program Files\EndNote X7\Terms Lists\
5. Click on **Medical.txt** and OK to import Term Lists.



3. MANUALLY INPUTTING REFERENCES

Although it is much faster to input references (citations) using bibliographic databases, sometimes references from books or journals will need to be typed into your EndNote library manually.

1. From the **References** menu select **New Reference**
2. Select type of reference from the pull-down box, Journal Article, Book or Book Section are the most commonly used.
3. For example type in the following reference :

The screenshot shows the 'New Reference' dialog box in EndNote. The 'Reference Type' is set to 'Journal Article'. The 'Author' field contains 'Islam, M.S.' and 'Anderson, C.S.'. The 'Year' is '2008'. The 'Title' is 'Trends in incidence and outcome of stroke in Perth'. The 'Journal' is 'Stroke', 'Volume' is '39', 'Issue' is '3', and 'Pages' are '776-782'.

4. When the reference is completed you will need to click on file and save and then close the window.

TIP : To input organisations as authors put a comma at the end of the organisation name ie : **World Health Organization,**

TIP : If your reference is not from a journal will need to change the Reference Type to the applicable source, such as book, book section, webpage etc.

4. CHOOSING OUTPUT STYLES IN ENDNOTE

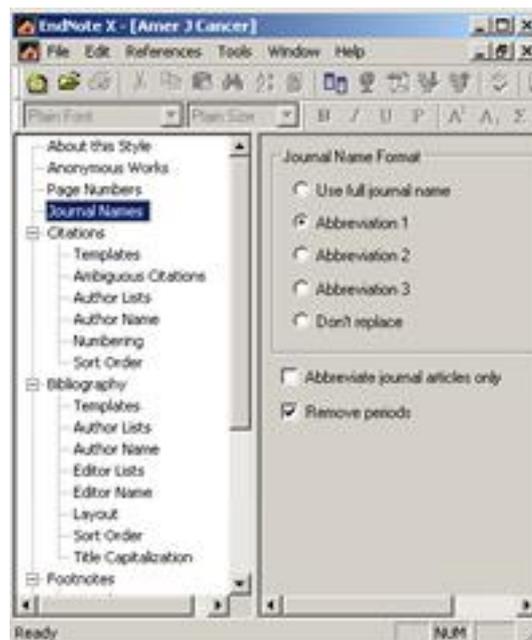
Journals and Books require references to be recorded in specific styles, often with journal titles abbreviated. The Vancouver style is generally used with journals, whereas the Harvard style is often used with books. The style used by a specific journal can also be found by using the Style pull-down box on the EndNote toolbar, and selecting **Select another style** :



A specific style can be further edited by going to :

Edit ➔ **Output Styles** ➔ **Open Style Manager**

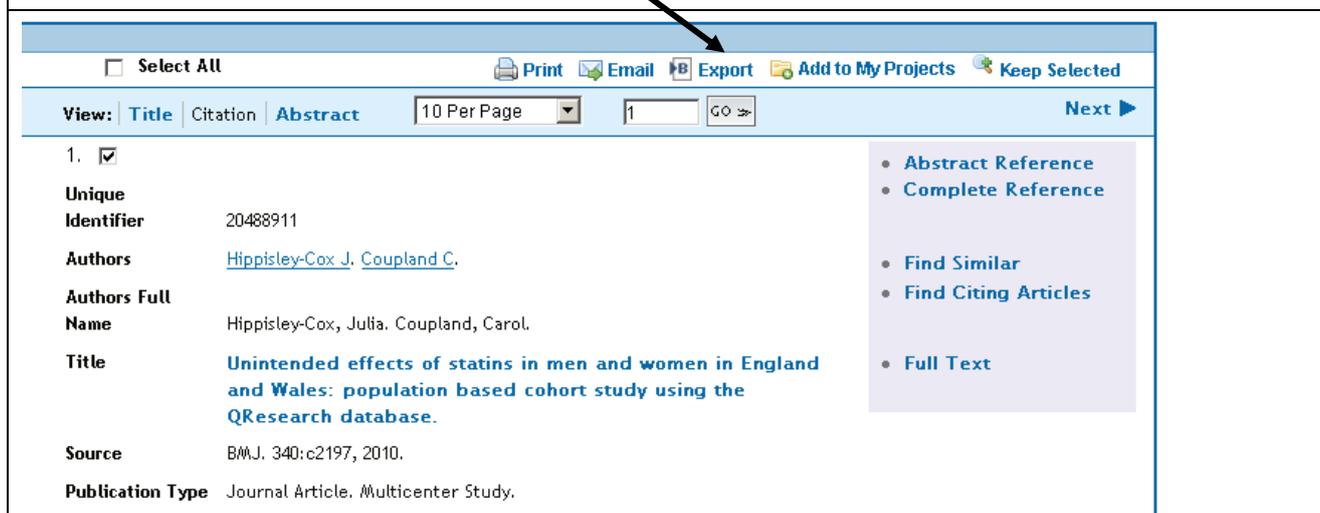
After finding the specific Style required, select **Edit** and field to edit, such as Journal Names, the citation template or bibliography template.



5. DIRECT EXPORT OF REFERENCES INTO ENDNOTE

After completing a search of a database, references can be exported directly to an EndNote library. This process is supported by OvidSP databases, PubMed, Google Scholar, and also many ejournals for direct export of individual citations. The following example is from OvidSP Medline :

1. Select the **Export** option at the top of the results screen.



1. Select the **Export** option at the top of the results screen.

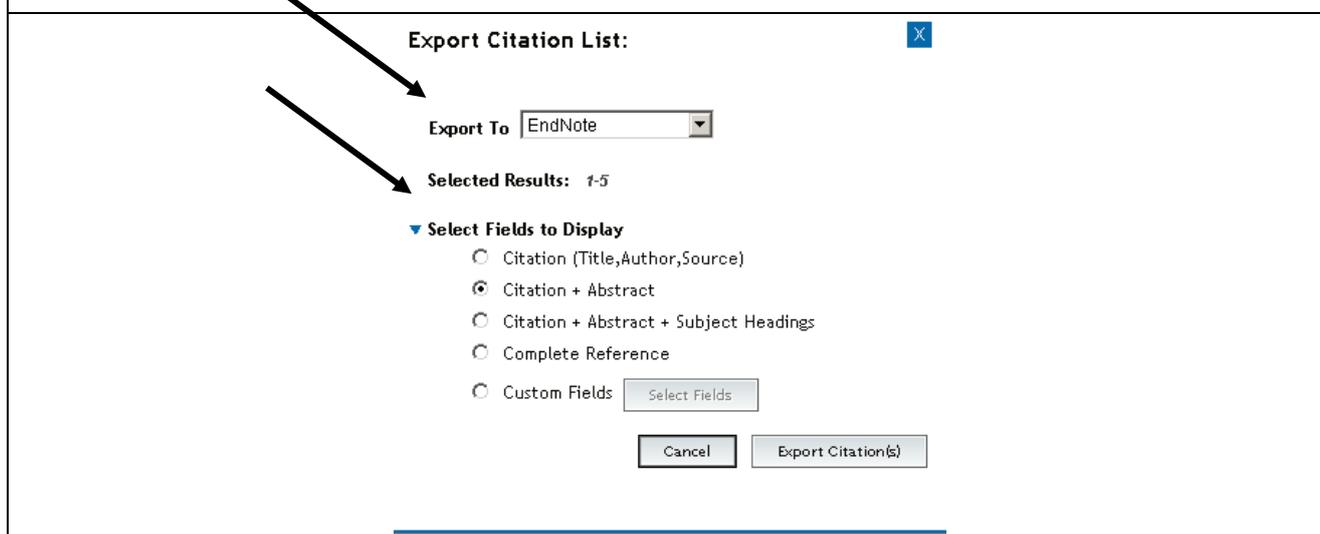
The screenshot shows the OvidSP Medline search results interface. At the top, there are navigation options: Select All, Print, Email, **Export** (highlighted with a black arrow), Add to My Projects, and Keep Selected. Below this, the view is set to 'Abstract' with '10 Per Page' and a 'Next' button. The search results list one entry, which is selected with a checkbox. The entry details are as follows:

- Unique Identifier:** 20488911
- Authors:** [Hippisley-Cox J. Coupland C.](#)
- Authors Full Name:** Hippisley-Cox, Julia. Coupland, Carol.
- Title:** [Unintended effects of statins in men and women in England and Wales: population based cohort study using the QRresearch database.](#)
- Source:** BMJ. 340:c2197, 2010.
- Publication Type:** Journal Article. Multicenter Study.

On the right side, there is a sidebar with the following options:

- Abstract Reference
- Complete Reference
- Find Similar
- Find Citing Articles
- Full Text

2. Select export to **EndNote** in the drop-down box, and the fields you which to have, and click on **Export Citation(s)**.



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The screenshot shows the 'Export Citation List' dialog box. The 'Export To' dropdown is set to 'EndNote'. The 'Selected Results' are '1-5'. Under 'Select Fields to Display', the 'Citation + Abstract' option is selected. The 'Export Citation(s)' button is highlighted.

Export Citation List:

Export To: EndNote

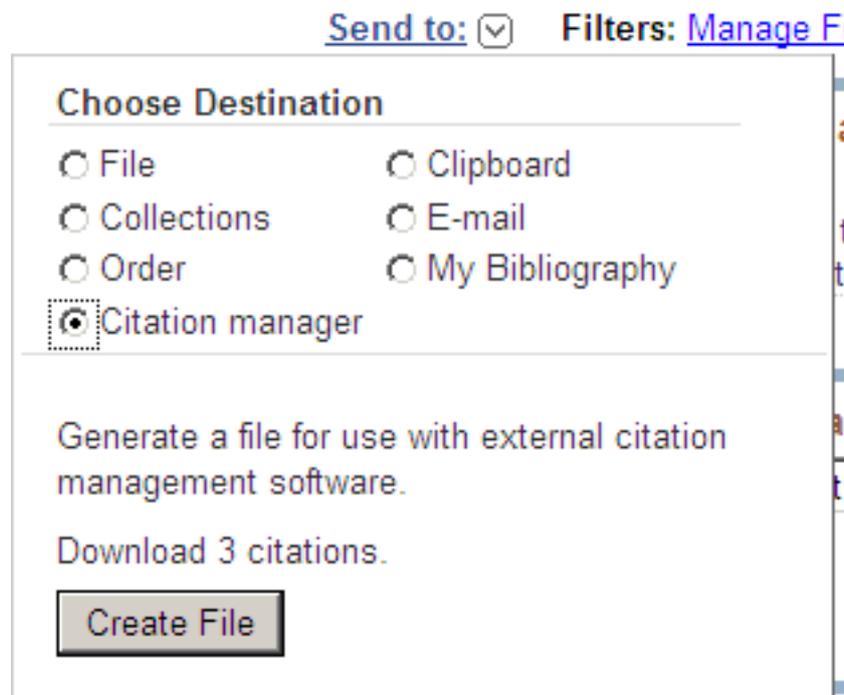
Selected Results: 1-5

Select Fields to Display

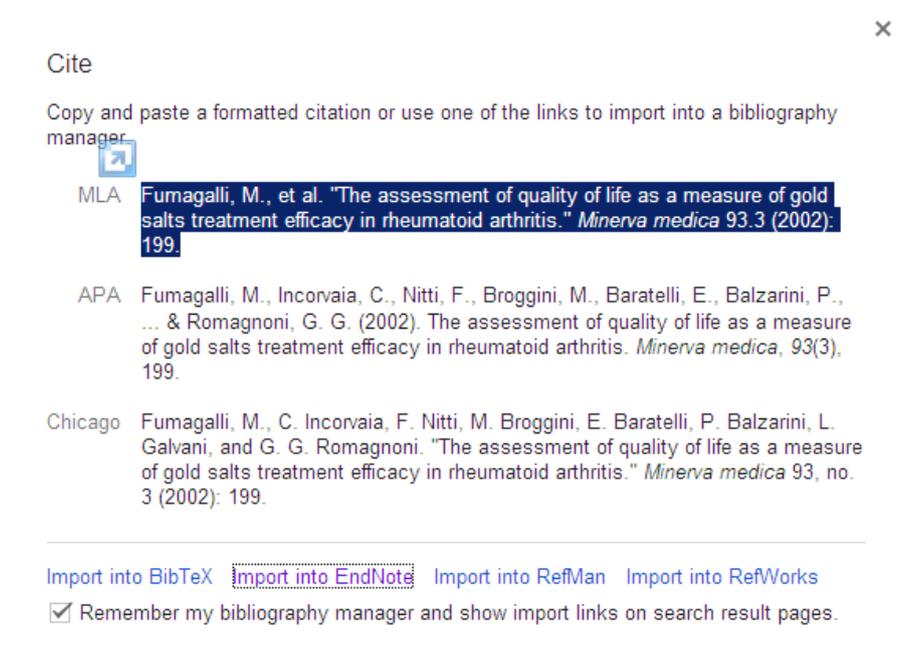
- Citation (Title,Author,Source)
- Citation + Abstract
- Citation + Abstract + Subject Headings
- Complete Reference
- Custom Fields

When your references appear in the EndNote screen, double-click on any reference to check which fields have been transferred.

When using PubMed there is a method to export selected citations into EndNote, by using the **Send to** option, choosing **Citation Manager** for the destination, and clicking on **Create File** to start the process.



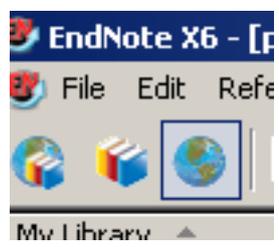
When using Google Scholar (scholar.google.com) you can export citations using the **Cite** link underneath references, and then use the **Import into EndNote** link in the popup box to move the full citation information into EndNote.



6. ONLINE SEARCH (USING A CONNECTION FILE)

Databases such as Medline (PubMed) can be searched without leaving EndNote by using **Online Search**. Three search modes are available when using online search.

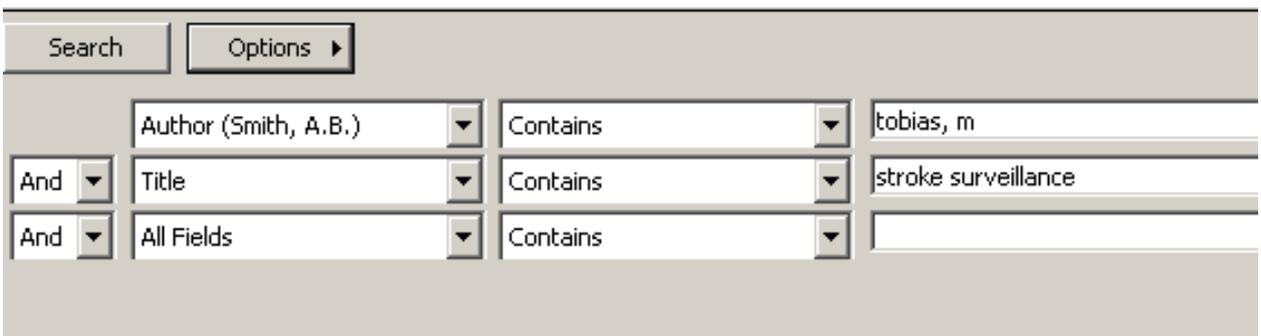
- **Integrated Library and Online Search Mode**
- **Local Library Mode**
- **Online Search Mode (Temporary Library)**



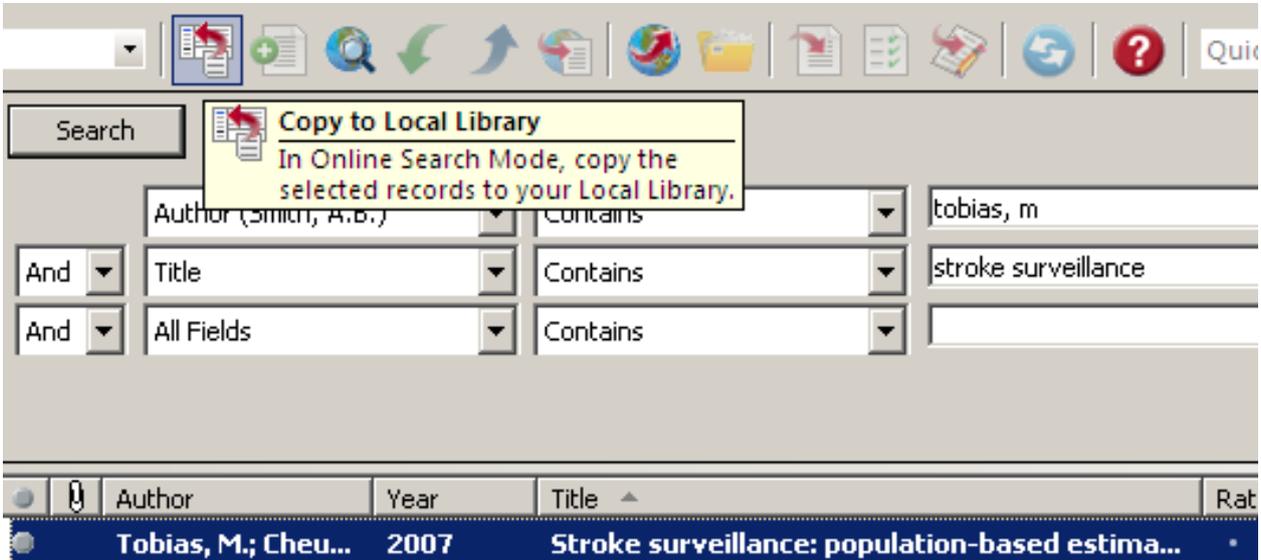
TIP : Online Search Mode is the safest mode, avoiding accidentally dumping irrelevant citations into your EndNote library. Use the search mode icons, on the top left-hand side of the screen, to change modes.

From the EndNote side panel under **Online Search** click on **PubMed (NLM)**

The search screen will appear at the top of the screen.



Move selected citations to library using the **Copy to Local Library** icon.



Within the list of Online Search connections are many useful sites for finding **book references** which include :

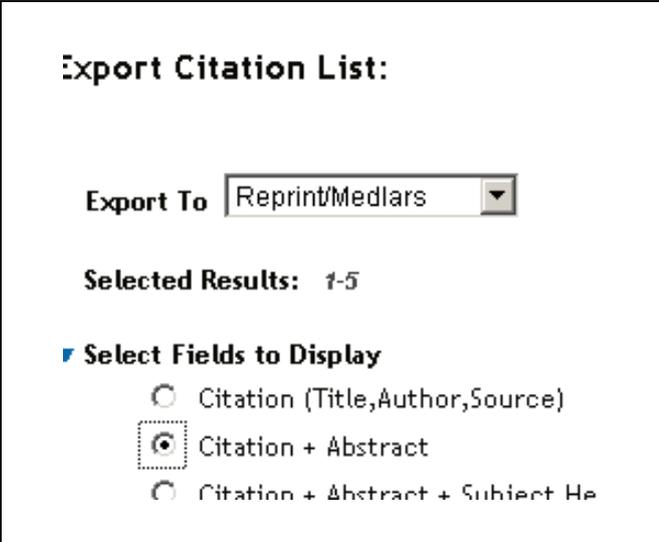
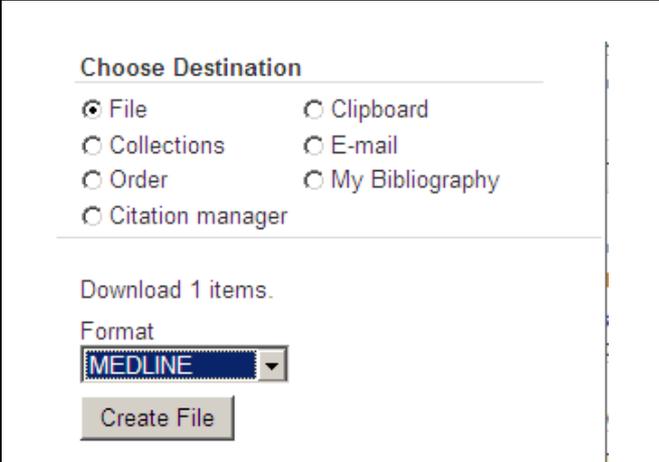
Monash University
University of Melbourne
National Library of Medicine
Library of Congress

(NB : these sites are **blocked** when using Alfred Health computers)

7. IMPORTING REFERENCES (USING AN IMPORT FILTER)

EndNote is able to import references which have been **saved as a file** when using databases such as PubMed or OvidSP Medline.

Step 1 is to save references in the **correct format** when using a database so that EndNote can interpret fields when importing data.

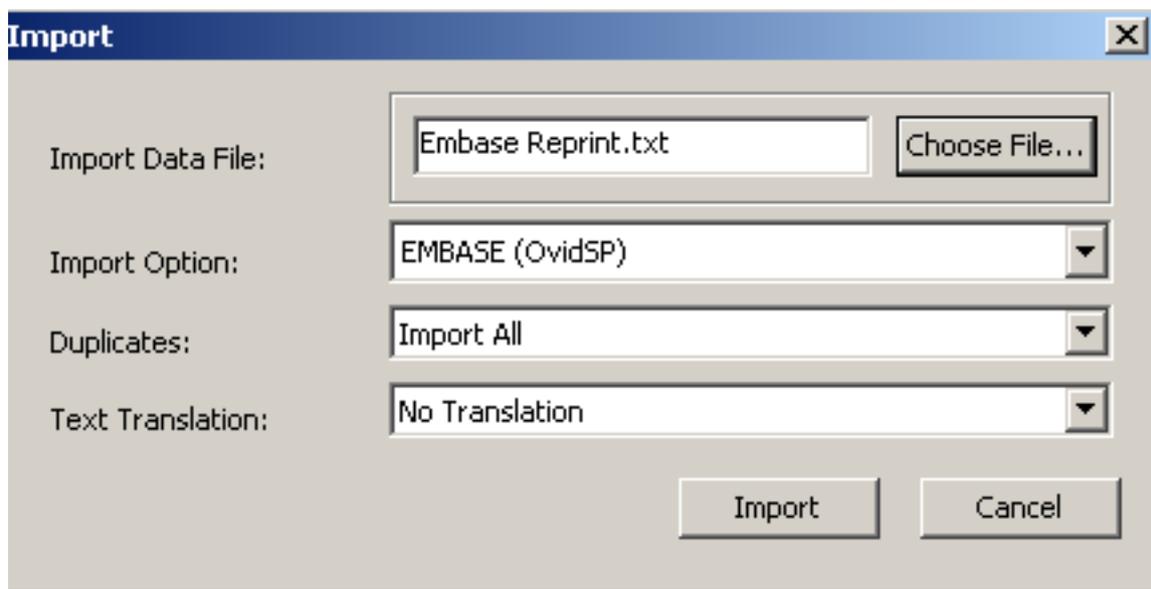
 <p>Export Citation List:</p> <p>Export To <input type="text" value="Reprint/Medlars"/></p> <p>Selected Results: 1-5</p> <p>Select Fields to Display</p> <ul style="list-style-type: none"><input type="radio"/> Citation (Title,Author,Source)<input checked="" type="radio"/> Citation + Abstract<input type="radio"/> Citation + Abstract + Subject He	<p>Use the Export option to save records in OvidSP databases.</p> <p>Select the Reprint/Medlars format before saving your records when searching Medline.</p>
 <p>Choose Destination</p> <ul style="list-style-type: none"><input checked="" type="radio"/> File<input type="radio"/> Clipboard<input type="radio"/> Collections<input type="radio"/> E-mail<input type="radio"/> Order<input type="radio"/> My Bibliography<input type="radio"/> Citation manager <p>Download 1 items.</p> <p>Format</p> <p><input type="text" value="MEDLINE"/></p> <p>Create File</p>	<p>When saving records in the PubMed database use the Send to link at the top right-hand of screen, and select the MEDLINE format option before saving.</p>

Step 2 is to import the file of references into EndNote, choose from the toolbar :

File ➔ **Import** ➔ **Choose File** ➔ *locate file*

From the **Import Option** list choose **Other filters** to find correct file format, then click on **Import**.

Common import filters : PubMed (NLM), MEDLINE (OvidSP), EMBASE (OvidSP), CINAHL (Ebscohost), PsycInfo (Ebscohost).



8. NOTES, LABELS, GROUPS AND PDF'S

After you have successfully added references into your EndNote Library, individual references can be made more useful by adding research notes, or labels; creating EndNote groups, and linking full-text pdfs to references.

ADDING DATA TO FIELDS

Double click any reference and add your own information to fields within a reference, ie research notes.

2007/12/18 09:00

Aust N Z J Public Health. 2007 Dec;31(6):520-5.

Research Notes

Key article on incidence, prevalence and mortality of stroke in New Zealand. AC

JRL

<http://www.ncbi.nlm.nih.gov/pubmed/18081570>

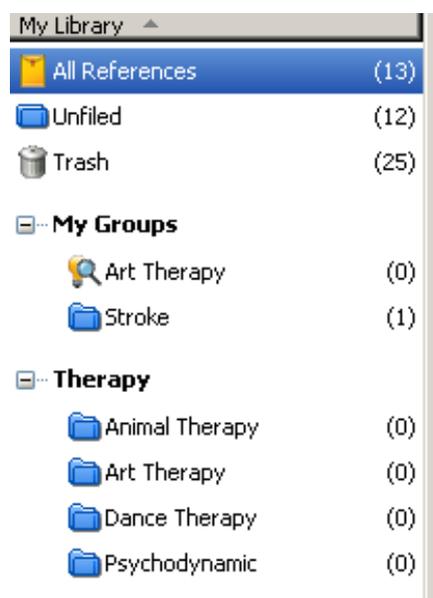
File Attachments

Information can be added to the **Label** field, which will be displayed in the reference summary line screen, and can be used when searching your library.

Author	Year	Title	Rating	Journal/Secondary Title	Author Address	Label	
Tobias, M.; Cheun...	2007	Stroke surveillance: population-based estimates and ...		Aust N Z J Public Health	Public Health Intellig...	AUST STROKE STUDY	1
Turley, M. L.; To...	2006	Cardiovascular mortality attributable to high ...		Aust N Z J Public Health	Public Health Inte...		1

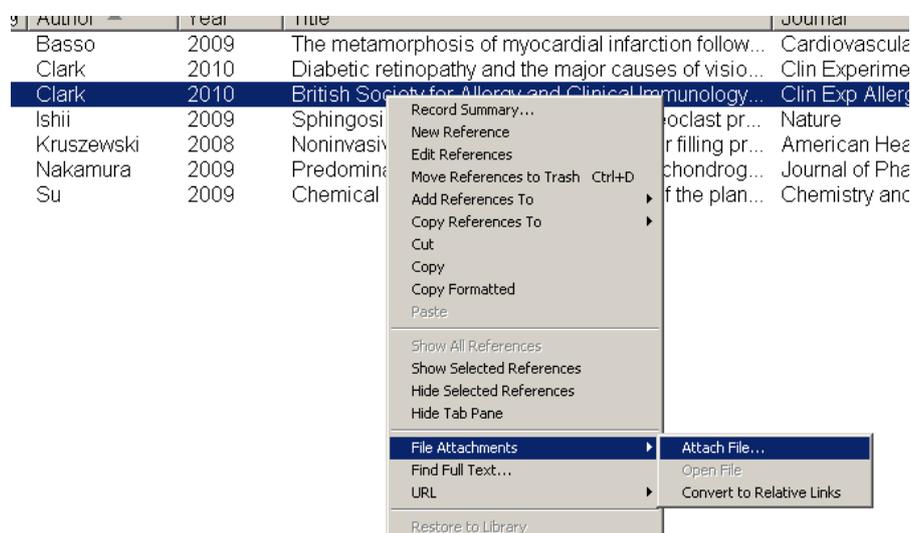
GROUPS

Under the Group tab at the top of the EndNote screen are options to create a **Group**, create a **Smart Group**, and create a **Group Set**. Groups allow you to manually group references together by dragging and dropping. Smart groups use a search profile to automatically add references into a group. Group sets are useful to further divide a topic into smaller sub-divisions.

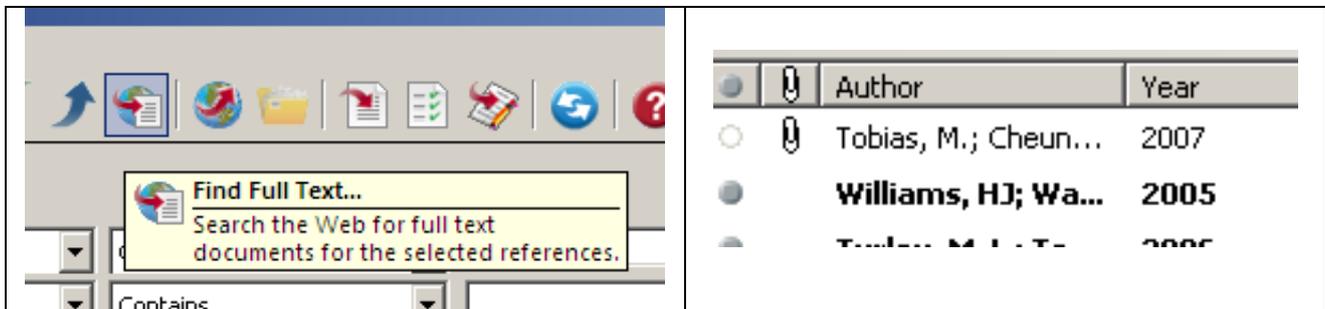


PDF's and ATTACHMENTS

If you wish to link references to PDF's (or other document types), this can be done manually by highlighting a reference in EndNote and using the right-hand mouse button to select **Files Attachments**, then **Attach File**.

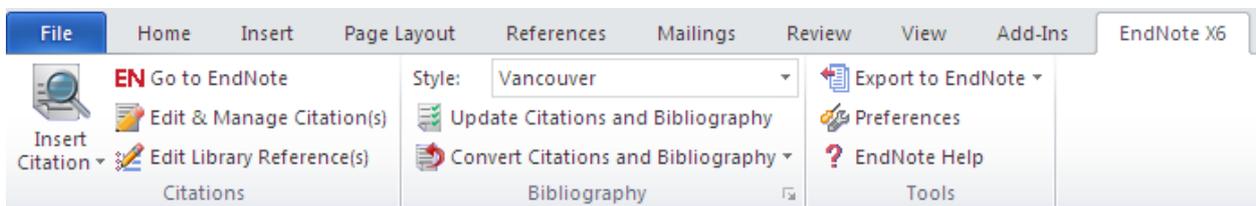


EndNote can also assist the searching and downloading references which are listed by highlighting the reference(s) of interest and then clicking on the Find Full Text ICON. OK the copyright notice and the system will attempt to download the PDF document if possible. A successful download will be indicated by a paperclip icon next to the reference in the display.



9. USING ENDNOTE WITH MICROSOFT WORD

When EndNote is installed on a computer, an EndNote tab is added to **Microsoft Word**. Icons are available to allow you to find references in your EndNote library and insert these as citations into your document



Class Exercise :

Although stroke rates appear to be decreasing,¹ population ageing will intensify the disease and the need for effective management strategies.²

1. Islam MS, Anderson CS. Trends in incidence and outcome of stroke in Perth. Stroke. 2008;39(3):776-82.

2. Tobias M, Cheung J, Carter K, Anderson C, Feigin VL. Stroke surveillance: population-based estimates and projections for New Zealand. Aust N Z J Public Health. 2007;31(6):520-5.

MS WORD ENDNOTE ICONS

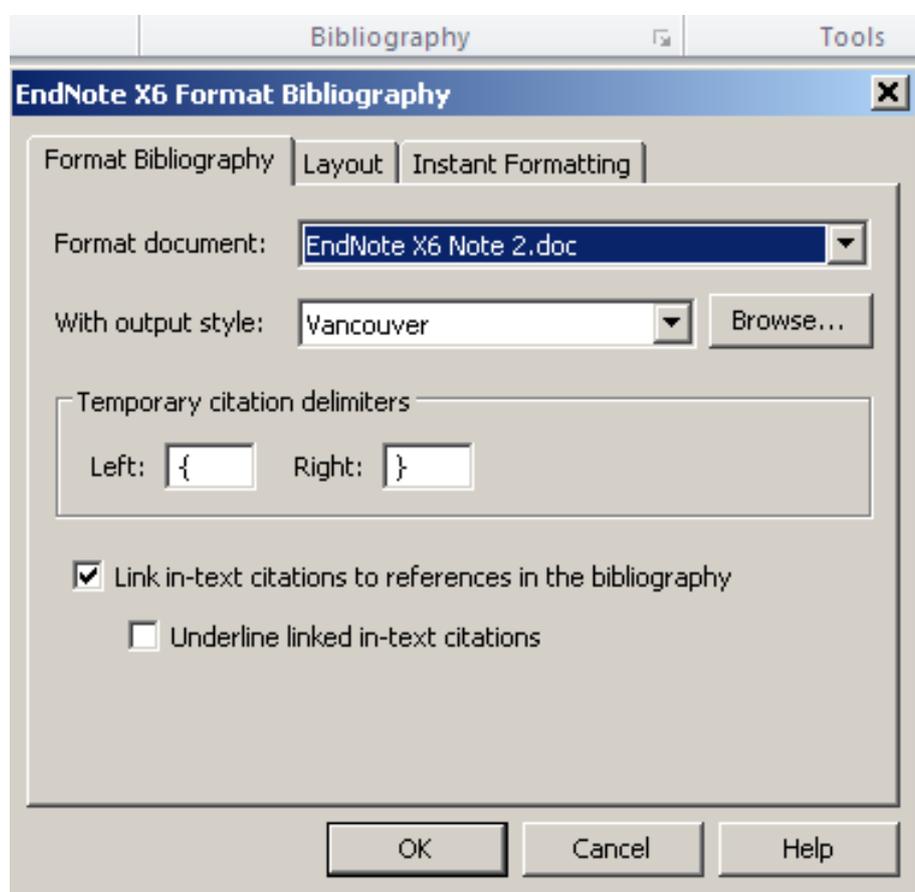
Find Citation + Go to EndNote Use these to find references you need to cite.

Edit & Manage Citations Move mouse cursor just before in-text citation marker, and click, grey highlight indicates citation can be edited.

Update Citations & Bibliography Use to reformat paper updating any citation deletions or changes to style, etc, Use to convert document from an unformatted state to formatted.

Convert Citations & Bibliography this is a pull-down screen with the following icons : **Convert to Unformatted Citations** This will remove the formatted bibliography references from your document, and convert the in-text citation to a format like {Smith, 2012, #13}. This will also switch off instant formatting. **Convert to Plain Text** Use this to convert your document to a safer format for proof reading and sending to a publisher for review.

Other useful controls can be found in the Format Bibliography options. To display the options click on the small down arrow to the right of the label "Bibliography".



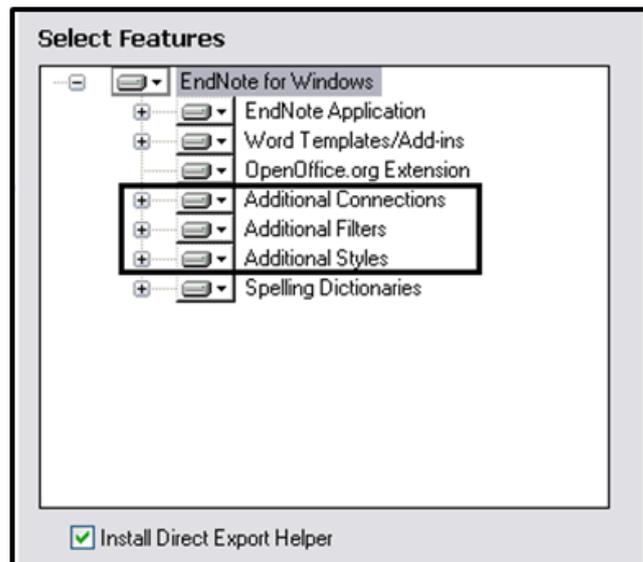
You can change the style of your referencing by using the Style pull-down box. However if you need to change the format of your in-text citations or bibliography references for a specific style, this needs to be done via the EndNote program using Edit Output Style. There is a template for in-text citations and templates for reference types where small changes can be made to change the final look of citations and references.

APPENDIX

A. CUSTOM INSTALLATION

EndNote X6 only installs a selection of the most popular filters, connection files and output styles by default. To install ALL available files:

1. Select the Custom option during installation.
2. Choose Entire feature will be installed on local drive from the pull-down menu of Additional Filters. Repeat the previous step for Additional Styles.



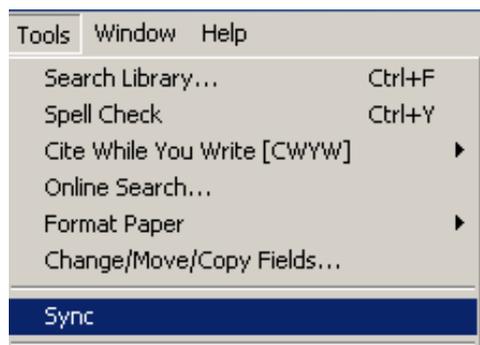
B. ENDNOTE BASIC

EndNote users have the option to create an **EndNote Online** account, which is very useful as either a backup of your PC/MAC version, or as a method of using EndNote entirely.

An account can be created at :

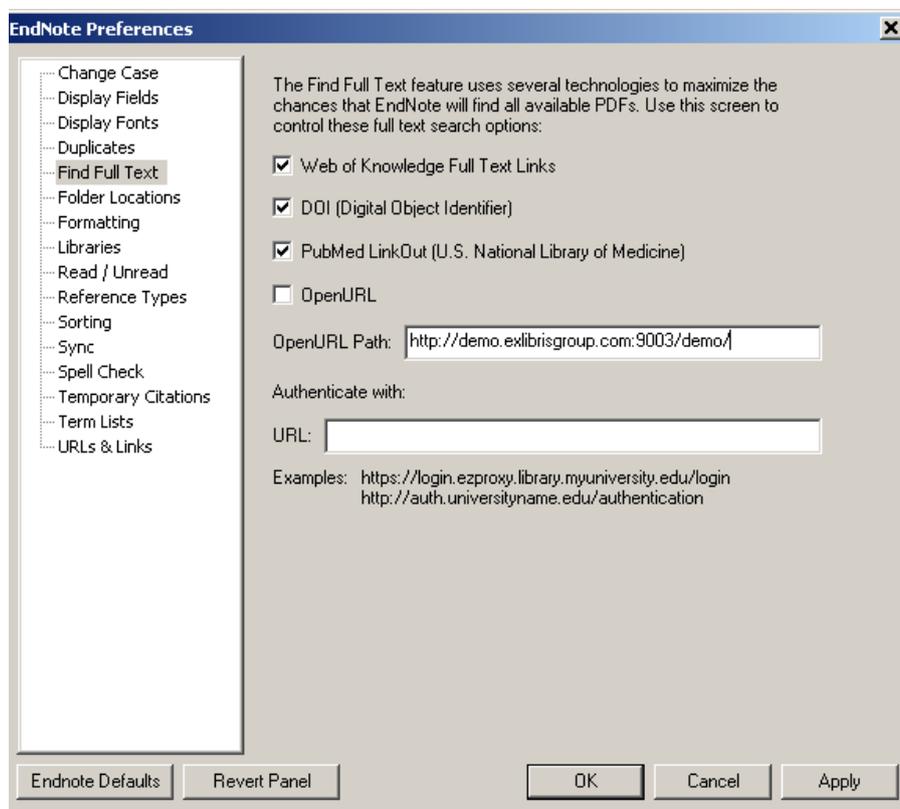
<https://www.myendnoteweb.com/EndNoteWeb.html>

Under the **Tools** tab users will find a option to **Sync** their library with EndNote Web to keep both versions uptodate. Login details can be stored in preferences.



C. PREFERENCES

EndNote **preferences** can be found via under the **Edit** tab.



TIP : use preferences to :

- Change default display fields in the references summary screen
- remove OpenURL option if Find Full Text is not working
- store login details for EndNote Web sync function