

EndNote X7 Basics

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ENDNOTE™ x7



Health Sciences Library System, University of Pittsburgh

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Lesson 1

EndNote Elements

Parts of EndNote

The EndNote library

- An EndNote library is a **database**.
- A database is a set of **records**, each containing designated spaces for the same type of information.
- The information types are called **fields**.
- In an EndNote library, each reference is a record, and the fields are reference elements such as author, title, journal, and publication year.

The connection file

EndNote can connect directly to online bibliographic databases such as PubMed and PITTCat (A **bibliographic database** is one that contains detailed citations to published literature). This lets you search databases directly from EndNote.

The EndNote component that connects to online resources is called a **connection file**. It contains the information EndNote needs to reach and search online databases.

RECORDS (EndNote library references)

FIELDS (reference information types)

Author	Title	Journal	Date
Viljoen A, Sinclair AJ.	Diabetes and insulin resistance in older people	Med Clin North Am	2011
Woodard LD et al.	Impact of comorbidity type on measures of quality for diabetes care	Med Care	2011
Mozaffari M et al.	Diabetes mellitus and sensorineural hearing loss among non-elderly people	East Mediterr Health J	2010
Murthy SB et al.	Does diabetes mellitus alter the onset and clinical course of vascular dementia?	Behav Neurol	2010

The import filter

When a search is complex, it is better to find references using two steps: searching in the database, then importing the desired references into an EndNote library.

References are either exported directly to EndNote over the web or saved as a separate file that can be imported into EndNote. In both cases, the **import filter** tells EndNote how to translate the references into library records.

Output styles

In addition to standard formats such as APA and Uniform Requirements, many journals and other periodicals have their own variations on the inclusion, order, and appearance of citation elements. Depending on the style chosen, the same citation can vary noticeably when it is formatted:

1. Viljoen A, Sinclair AJ. Diabetes and insulin resistance in older people. *Med Clin North Am*. 2011 May;95(3):615-29, xi-ii.

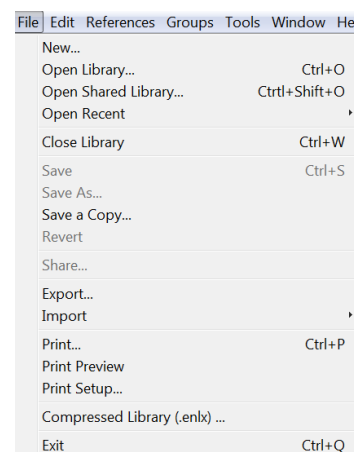
[1] A. Viljoen, A.J. Sinclair, Diabetes and insulin resistance in older people, *Med Clin North Am*, 95(3) (2011) 615-629, xi-ii.

VILJOEN, A. & SINCLAIR, A.J. 2011: Diabetes and insulin resistance in older people. *The Medical Clinics of North America*, 95, 615-629, xi-ii.

Before generating a bibliography, EndNote prompts you to select an **output style file** containing format specifications. References are then automatically arranged and formatted to the desired set of requirements.

Menu items for different EndNote file types

The *File* menu includes options specific to EndNote library files as well as general commands.



Libraries

- To open an existing library, choose either *File, Open Library* or *File, Open Recent*. Libraries you have recently used will be available in the submenu.
- To create a new library, choose *File, New*.

Output style files

- To select style files for formatting citations, choose *Edit, Output Styles, Open Style Manager*. Check off the file or files you want to use. The ones you select will then be available directly from the *Edit, Output Styles* menu.
- To edit an existing style file, choose *Edit, Output Styles, Open Style Manager*. Click on the file you want to change, then click on *Edit*.

General commands

For **all** EndNote file types, use *File* menu commands to save (*Save*), name or rename (*Save As*).

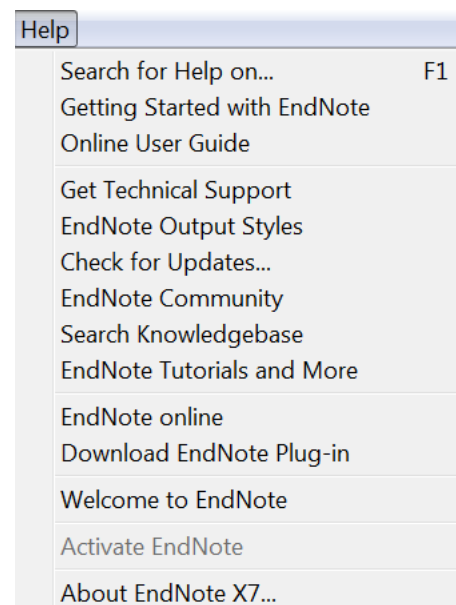
Additional file sources

If you work with databases or publications not covered by the files that come with EndNote, check the *Downloads* section of the EndNote web site. Here you can download additional connection, filter, and style files.

See purple handout, *Updating Endnote Connection, Filter, and Style Files*.

User support

- The *Help* menu includes links to Windows and Mac user guides, tutorials, and other useful resources.



- HSLS users' most common EndNote questions are asked and answered in the **How Do I?** section of our web site under EndNote and Mendeley:

<http://hsls.libguides.com/citation-manager>

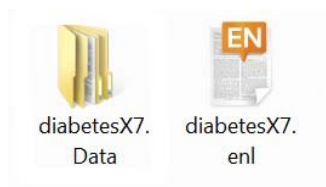
See blue handout, *Support web Sites for Pitt EndNote users*.

Lesson 2

Managing the EndNote Environment

Library basics

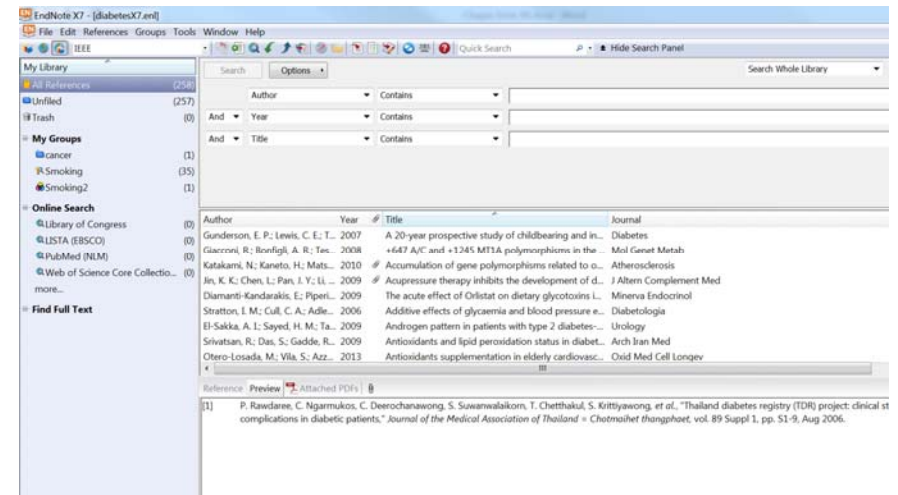
- On your Desktop click on the folder named **HSLs Classes > EndNote X7 Diabetes**, and find the **diabetesX7** library (**diabetesX7.enl**).
- Double click on the **diabetesX7.enl** icon to open the file.



- Note that every Endnote library consists of two elements: the library itself (.enl) and a .Data folder with the same name.

The library window

- The Library window has three panes: main page, My library, and search. Click and drag a column divider to change the width of panes.



- The main pane displays references in the library. It shows reference records divided into fields (author name, publication year, title, journal name, etc.) The paper clip field indicates an attachment to the record.
- The left **My Library** pane is for keeping track of references in the current library and one-click connections to online databases (**Online Search**). It also includes **My Groups** for references you want to keep together.
- The Search section will be discussed later in the lesson.

Sorting the library

- Sort the library by clicking on the desired field in the main pane. Click a second time to reverse the sort order.
- To sort on multiple fields choose *Tools, Sort Library*.

Customizing the library

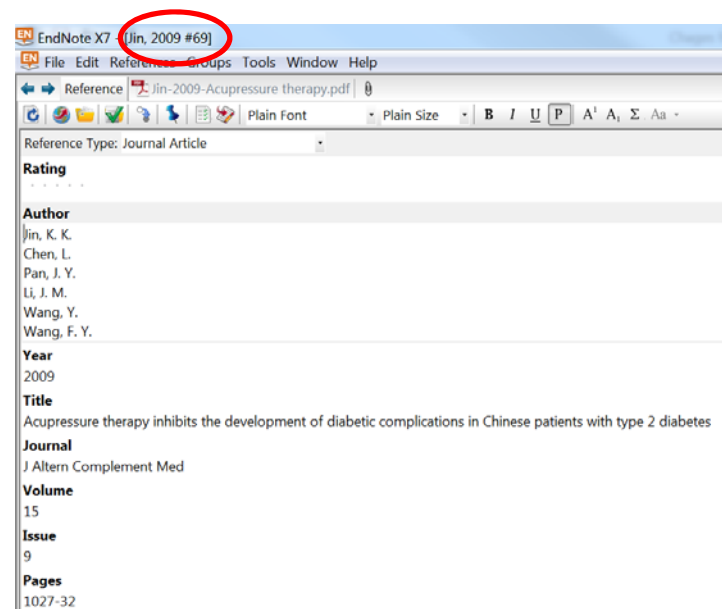
- *Edit, Preferences* offers many options, some relating specifically to EndNote libraries: *Libraries*, which specifies a library to open automatically when EndNote is started; *Display Fonts*; *Display Fields*; *Find Full Text*; and *PDF Handling*.
- A check box at the bottom of the Display Fields option also lets you specify whether to display all authors or just the first.

Important points about libraries

- Each library is a separate file. Create as many libraries as you need, assuming storage space is not an issue.
- Organize references and libraries in the way that will best support your work.
- Libraries created with Macintosh and Windows versions of EndNote are compatible as long as the file name includes the .enl extension (example: **diabetesX7.enl**).

Working with references

- Double-click on a reference in the main pane to open.
- Note unique identifying information at the top of the reference window: last name of first author, publication year, and record number. EndNote will use this information to match references cited in Word documents to references in your EndNote library.

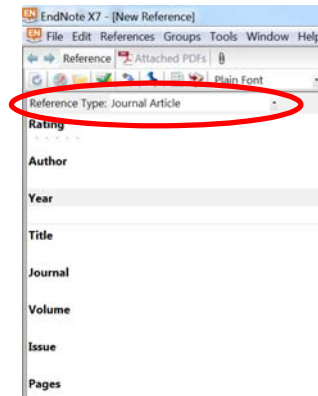


- Close the reference by clicking on the **X** in the upper right corner. Save changes as you are prompted.

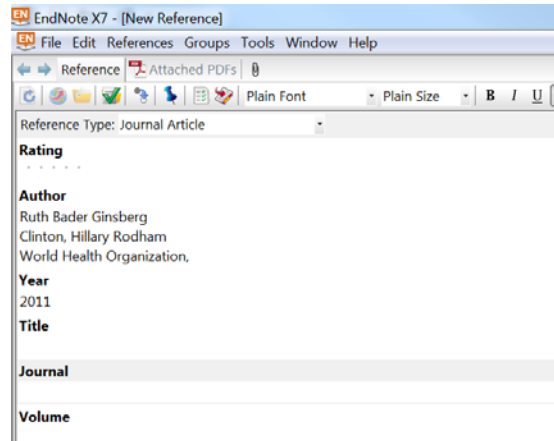
Creating a new reference

- Choose *References, New Reference* to open a **New Reference** window.

- New references appear by default as journal articles. To create a Book reference instead, click on the down arrow next to the *Reference Type* box to display its menu. Choose *Book*. Notice that the fields for a book reference are different from those for a journal article.



- Enter reference information starting with author names. Names can be entered two ways: either First Middle Last (*Ruth Bader Ginsberg*) or



Last, First Middle (*Ginsberg, Ruth Bader*). Note that Organizational authors should be entered with a comma after the last word to distinguish it from a person's name (*World Health Organization,*).

- Author names must be entered one per line. With the cursor in the *Author* field, type the first author's name, then press the *Enter* key. Continue entering author names, one per line.
- Check the EndNote manual for full data entry details.
- You can leave fields blank. Do not add extra punctuation (such as parentheses around the year) or text formatting (such as bolding or italics). EndNote will add these later, when you create a formatted bibliography.
- Close the reference window by clicking the **X** in the top right hand corner, saving the reference first as you are prompted.

Searching for references in a library

Suppose you want to find all the references in your EndNote library that mention smoking and were published no earlier than 2010.

- Click in the search pane at the top of the library window.

Search		Options ▾	
	Any Field ▾	Contains ▾	smoking
And ▾	Year ▾	Is greater than or equal to ▾	2010
And ▾	Title ▾	Contains ▾	

- Enter *smoking* in the first search item window. Change the qualifier from *Author* to *Any Field*. The qualifier *Any Field*

to the left of the box directs EndNote to search all fields (title, abstract, keywords, etc.) for the word *smoking*.

- For the Year, move horizontally to the next window, click on the down arrow and change *Contains* to *Is greater than or equal to*.
- To find references from specific years enter *2010* in the next line.
- *And* in the first window of the row ensures that both *smoking* and *2010* will be included in the search:
- Click the *Search* button. The search results are displayed in the Library window.

Selecting a style for formatting

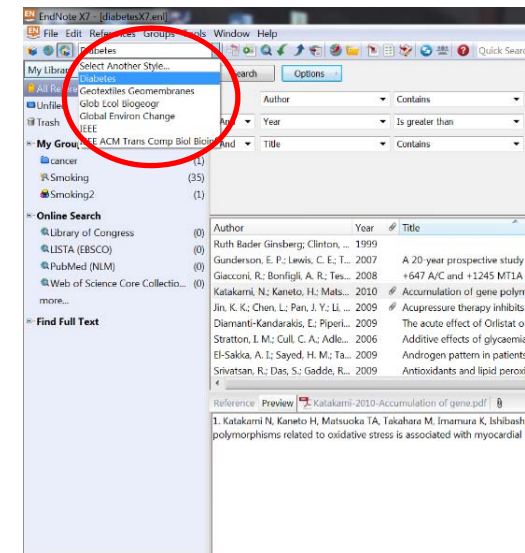
To choose the *Diabetes* style:

- Choose *Edit, Output Styles, Open Style Manager*
- If not in alphabetical order, click on *Name* field to sort style files alphabetically. Scroll down to find *Diabetes*. Click in its check box.
- Close by clicking on the small X in upper right of box.

Previewing references

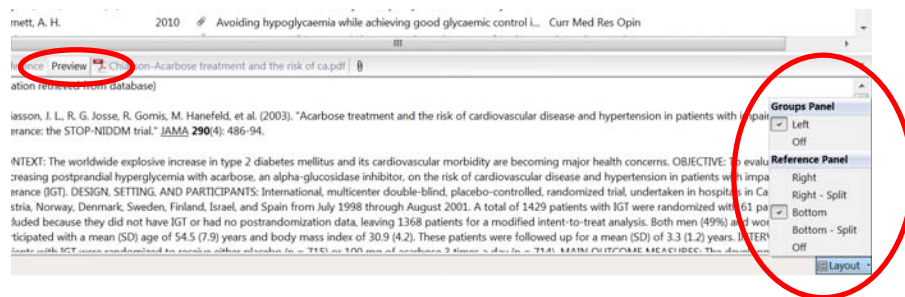
See how references will look when formatted by previewing them in the **Library** window:

- Use the drop down menu in the Endnote toolbar to select the style you would like to use.
- In the main pane, click on a citation, then on the *Preview* tab (under the list of



references) to display the selected citation in the current style (You can preview only one at a time).

- If *Preview* tab is not showing at the bottom of the window, click on the *Layout* drop box at the very bottom of the screen. Choose location for Reference Panel.



Returning to the complete library

- In the **My Library** pane, click on *All References*.
- Or, choose *References, Show All References*.

Important points about references

- Each EndNote reference includes all the information needed to cite it in a bibliography. Keywords, notes, abstracts, and URLs can be added, and PDFs and other files can be attached (The actual text of a PDF cannot be stored in any field, though).
- Each new reference is automatically assigned a unique, permanent record number that cannot be changed. If a reference is deleted, that reference number no longer exists in the library.

Lesson 3

Finding New References from Within EndNote

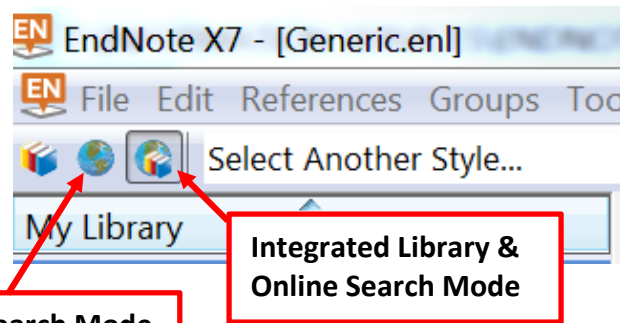
When to search from within EndNote

Searching an online database from within EndNote is ideal for simple tasks such as retrieving a known reference or verifying references you have already identified.

Example: Use PubMed unique identifier (PMID) or ISBN.

Rules for connecting to the online database

- You can connect in either *Online Search Mode* (below middle) or *Integrated Library & Online Search Mode* (below right).

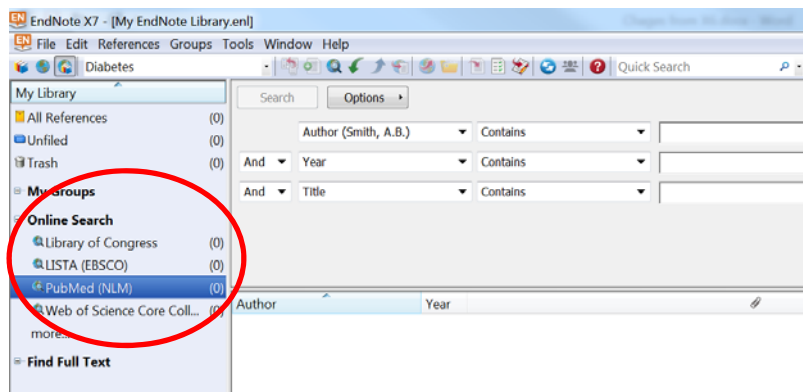


- You must connect to either a free database product (examples: PubMed, PITTCat) or one that HSLs subscribes to (example: OvidSP MEDLINE).

Connecting to the online database

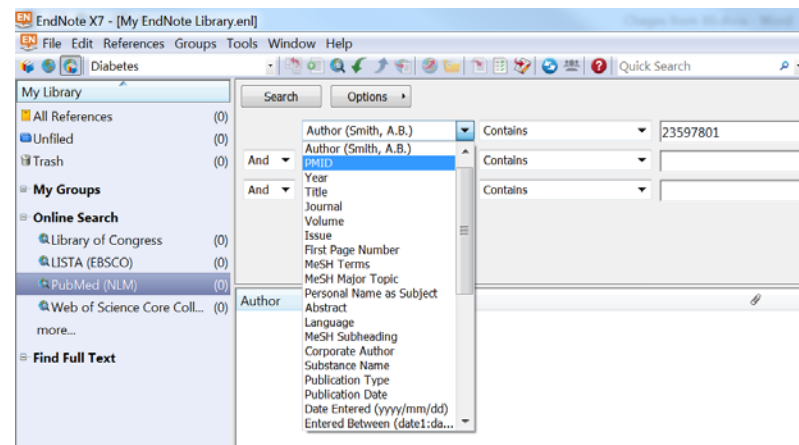
We will search the MEDLINE database using PubMed:

- Citations retrieved via searching online databases are automatically added into your EndNote Library. We will create a new library to manage these citations.
- Create a new library by clicking *File, New*. Choose where to save the file, then name the library.
- From the menu choose *Tools, Online Search*. Click on *PubMed (NLM)*, then on the *Choose* button.
- If not already there, PubMed is now automatically added to the **Online Search** group in your **My Library** pane, for future one-click access.



Searching the online database with EndNote

- Click on *PubMed (NLM)* in the **Online Search** section of your **My Library** pane.
 - Note that field names have changed to match those used in PubMed. Also note that searching for a range of dates is no longer an option.
- In the **Search pane**, Change Author to PMID using the drop box in the first column. Enter the PMID: 23597801 into the third column.



- Click on the *Search* button. Click *OK* in the pop-up box to retrieve results.

Moving references to a library

- Select desired records. Use *Ctrl+Shift* to select a block of records or *Ctrl+click* to select/unselect individual records.
- Right click on the main pane, still displaying your selected records. From the popup menu, choose *Copy References To >> diabetesX7.enl*.

See tan handout, *Searching PITTCat Records in EndNote X7*.

Lesson 4

Finding New References from Outside EndNote

When to search from outside EndNote

Leave EndNote and go to a database when you are doing a complex search and need more powerful or precise searching features or when you are away from your computer and want to capture references for later addition to an EndNote library.

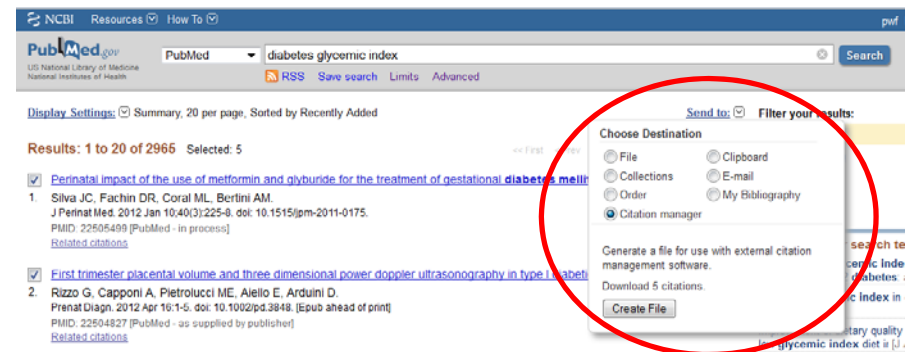
FIRST, create a new library as done on page 12.

Searching PubMed

- Start at the HSLs homepage, www.hsls.pitt.edu. Click on *PubMed* under the Quick Links box on the right.
- Perform a PubMed search as usual.
- *Select references.* Scroll through the retrieved references. Click in the check box to the left of each one you want to import to EndNote.

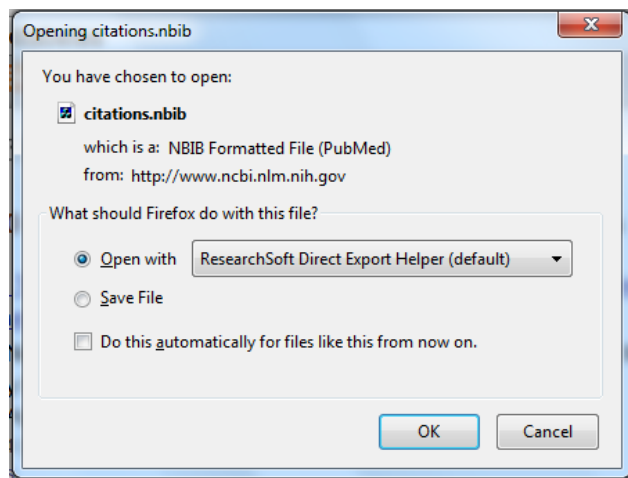
If you have ≤ 200 citations to import; Follow these steps:

- Click on the *Send to* link at right edge of reference display in PubMed.
- Choose **Citation manager** as destination. Then click on the *Create File* button.





If you are searching PubMed using **Firefox** you will see the pop-up box below once you click on the *Create File* button.



- Select *Open with* and make sure the drop down menu says *Research Direct Export Helper (default)*. Click *OK*.
- References will **automatically go** into the open EndNote library or the last library you had opened.



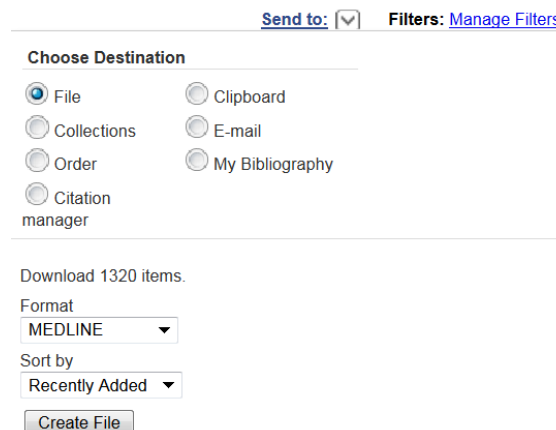
If you are searching PubMed using **Internet Explorer** you will NOT see the pop-up box above. Once you click on the *Create File* button references will **automatically go** into the open EndNote library or the last library you had opened.



If you are searching PubMed using **Chrome**, once you click on the *Create File* button, a pop-up box will appear to save an .nbib file. Save this file and import it into EndNote following the instructions starting on page 16 under the header “**You now have to import this file into EndNote**”. Note: Your file will be an .nbib NOT .txt.

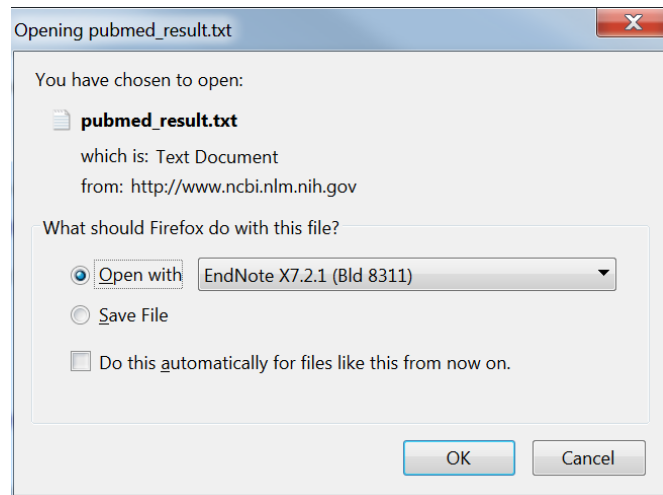
If you have ≥ 201 citations to import; Follow these steps:

- Click on the *Send to* link at right edge of reference display in PubMed.
- Choose **File** as destination.
- Choose **MEDLINE** as Format. Then click on the *Create File* button.





If you are searching PubMed using **Firefox** you will see the pop-up box below once you click on the *Create File* button.

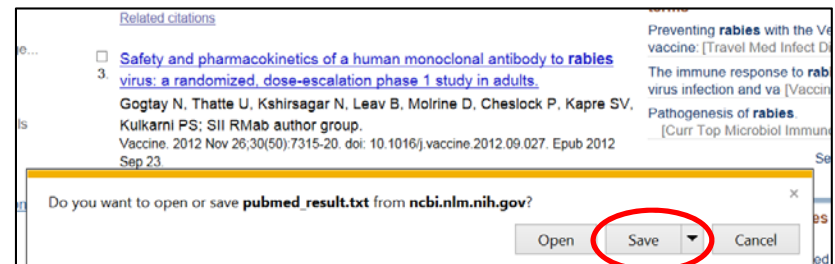


- Select *Open with*. If not already selected, select *EndNote X7* from drop down box. Then click *OK*.
- References will **automatically go** into the open EndNote library or the last library you had opened.



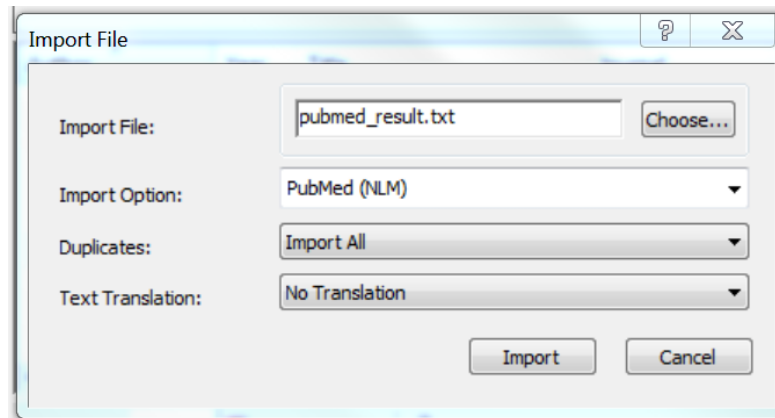
If you are searching PubMed using **Internet Explorer** you will NOT see the pop-up box above. Instead you will see the below pop-up box at the bottom of your screen once you click the *Create File* button.

- Choose *Save as* from the drop down menu. Choose where the file will be saved. The file will have a **.txt** extension.

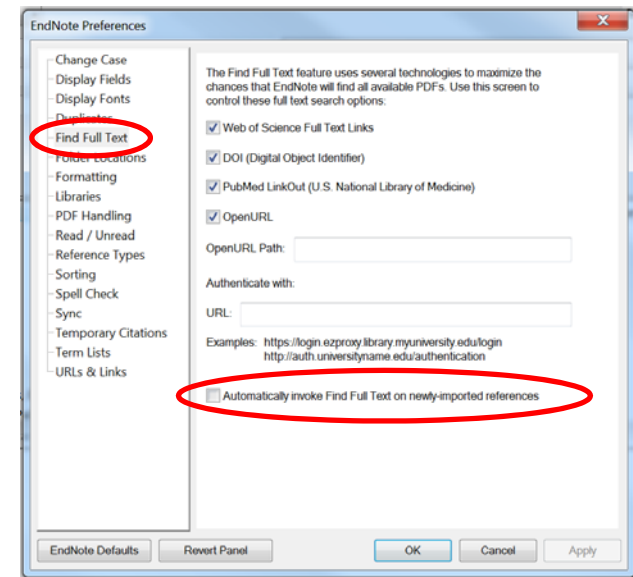


- **You now have to import this file into EndNote.**
 - o Either open an existing EndNote library or create a new library as done on page 12.
 - o From within EndNote open the Import dialog box by choosing *File, Import, File*.
 - o In the pop-up box click on the *Choose* button. Locate and open the PubMed file you want to import into EndNote. The file should have a **.txt** extension.
 - o For *Import Option*, choose PubMed (NLM) (If not already on the drop down list, choose *Other Filters*, click on *PubMed (NLM)*, then on the *Choose* button).

- o Change the *Duplicates* setting if you wish and *Text Translation* if necessary.
- o Click on the *Import* button. All the citations should successfully be added.



- Note: When importing citations into EndNote with this method, EndNote will by default **automatically** look for and add the available full text PDFs of the first 1000 citations. To turn this option off:
 - o In the EndNote menu Click on *Edit*, then *Preferences*.
 - o Select *Find Full Text* in the pop-up box and then uncheck the box next to *Automatically invoke Find Full Text on newly imported references*.



If you are searching PubMed using **Chrome**, once you click on the *Create File* button, a pop-up box will appear to save a .txt file. Save this file and import it into EndNote following the instructions starting on page 16 under the header “***You now have to import this file into EndNote***”.

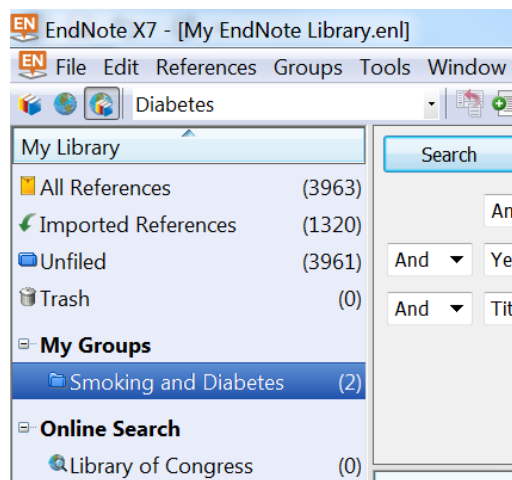
About duplicates

To find duplicates in a library at any time, choose *References*, *Find Duplicates*.

Groups

References included in an EndNote Library can be placed into Groups for organization.

- To create a group, choose *Groups, Create Group*. Name your group. In the example below, the group was named Smoking and Diabetes.



- To add references to an already existing group you can drag and drop individual references into the group. Or use *Ctrl+click* to select several references, then right click in the main pane and select *Add References To*. Click on the name of the group.
- Note: References are copied into groups and still remain in your **All References Folder** as well.

Lesson 5

Adding Citations and a Bibliography to a Paper

Cite While You Write tools in Word

EndNote's Cite While You Write (CWYW) provides access to EndNote commands and libraries from either EndNote or Word. It is installed automatically with the EndNote program.

The EndNote toolbar in Word 2013

- In **C:\EndNote Diabetes X7**, open **paperX7.docx** in Word 2013. Note bracketed reference information placeholders.
- Click on the **EndNote X7 tab** at top right to display Word's **EndNote X7 toolbar**.



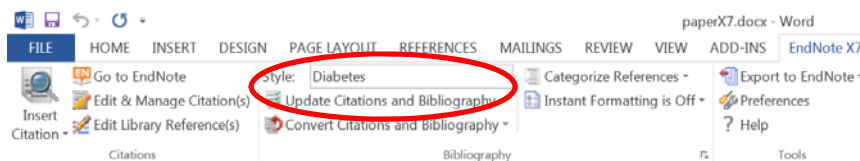
Adding citations to the paper

- CWYW adds citations and corresponding bibliography entries to the open Word document. These are then automatically formatted according to the current EndNote style.
- Citations can be inserted either from Word or from EndNote.

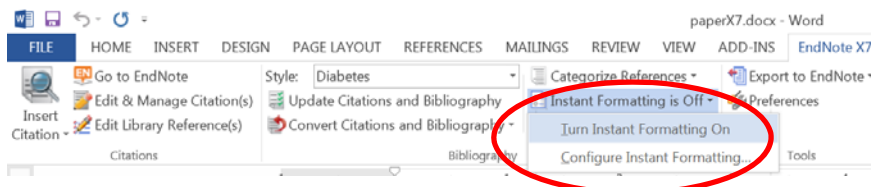
Adding pre-selected citations from EndNote

- In EndNote, have the **diabetesX7.enl** library open. Select one or several (using **Ctrl+click**) citations to use as references in your paper.
- Back in Word, click at the desired insertion point in **paperX7.docx**.

- In the **EndNote X7 toolbar**, click on the arrow next to the **Insert Citation** icon, then *Insert Selected Citation(s)*.
- Do you see in-text citations and corresponding bibliography entries formatted in the current EndNote style, which is *Diabetes*? If you still only see the bracketed reference information placeholders:
 - Click on *Update Citations and Bibliography* for one-time automatic formatting.



- To enable automatic formatting in the future click on the drop down arrow next to *Instant Formatting is Off* and select *Turn Instant Formatting On*.

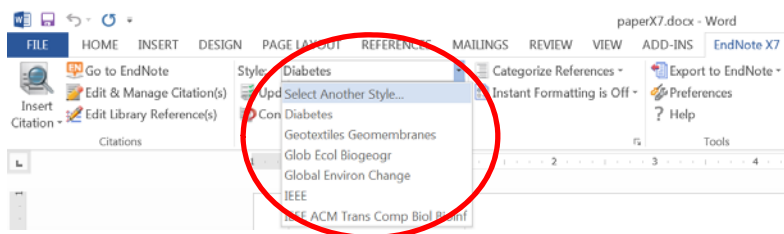


Selecting citations from Word

- In Word, click at the desired insertion point in **paperX7.docx**.
- In the **EndNote X7 toolbar**, click on the arrow next to the **Insert Citation** icon, then *Insert Citation*.
- In the **EndNote X7 Find & Insert My References** dialog box, enter terms (author, subject, title, textwords, etc.) to identify citations of interest in the **diabetesX7** library.
- Click on the **Find** button.
- In the list of retrieved references, select those that you want to insert. Use *Ctrl+Shift* to select a block of records or *Ctrl+click* to select/unselect individual records.
- Click on the **Insert** button.

Changing the Output Style in Word

- Currently our references are displayed in the *Diabetes* output style. To change the style your references are formatted in click on the arrow next to the Style window in the **EndNote X7** toolbar.



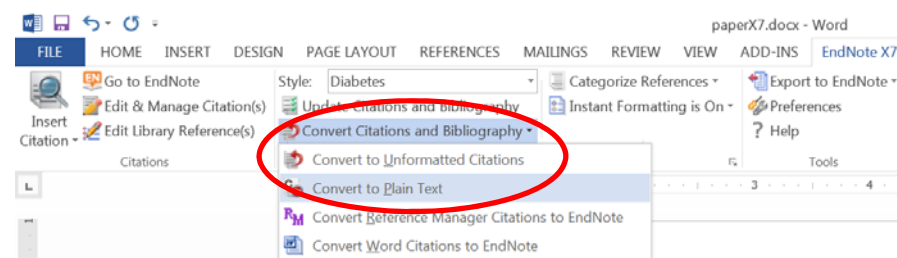
- Select another output style from the drop down menu or choose *Select Another Style* for more options.

Deleting Citations

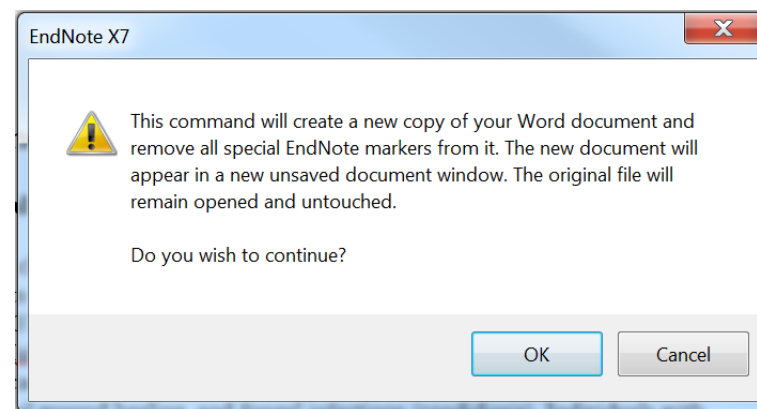
- Highlight the citation you want to delete in the main body of the paper and hit the delete key.
- The citation will be deleted from the reference list at the end of the paper.
- You can also use the *Edit & Manage Citation(s)* link in the **EndNote X7** toolbar.

Converting to Plain Text

- Submission of a manuscript for publication often requires EndNote field codes to be removed. In the **EndNote X7** toolbar click on *Convert Citations and Bibliography*, *Convert to Plain Text*.



- You will receive the below pop-up box.



- Click *OK* and give your file a new name. You will now

have two copies of your document: one with field codes (to make changes to your in-text citations or bibliography) and one without (for submission to publication).

Tips for success

- Keep all references for a paper or project in a single library.
- Save the paper frequently.
- Do not rely on EndNote's versions of bibliographic styles. Consult the Instructions to Authors section of the journal's web site or an authoritative style guide.

Lesson 6

Storing PDFs in EndNote

Note: While PDFs are the most popular type of file for attaching to EndNote libraries, the methods described below will work with other file types as well.

Pro and con of storing PDFs in EndNote

- Pro: Files will be readily available whenever you use the library.
- Con: Attached files can be large, increasing the size of your library file. This may cause EndNote to run slowly when you open or manipulate the library file or cause problems if you attempt to e-mail your library. Use **EndNote Compressed Library** feature to overcome this. (This is one way of sharing EndNote libraries).
 - To compress an EndNote library go to *File, Compressed Library (.enlx)*. This will result in your .Data and .enl files to be packaged together as an .enlx file.

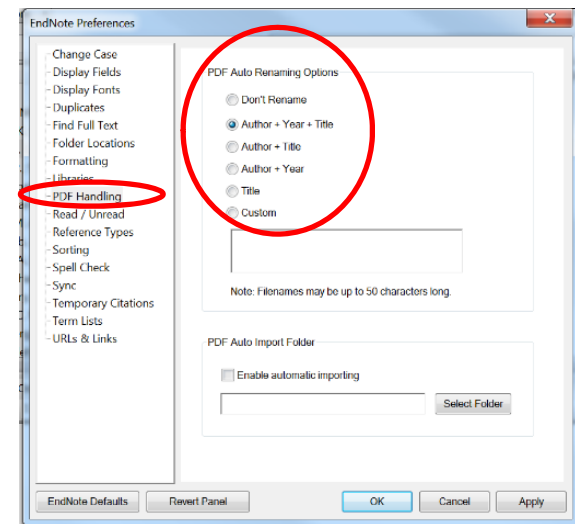
PDF auto renaming options

Often PDFs are saved with unintelligible files names. EndNote X7 allows automatic renaming of PDFs stored in the program.



- To automatically have PDFs within EndNote renamed with meaningful file names click on *Edit, Preferences, PDF Handling*.

- Change the default *Don't Rename* to which file naming convention you would like your files stored in. Click *OK*.

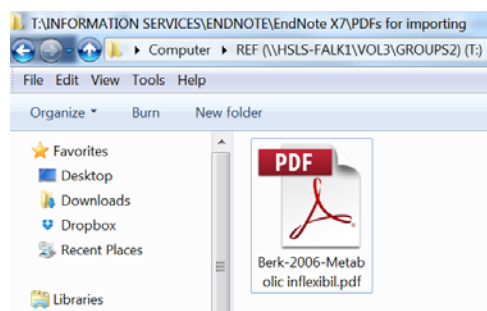


- Note that this will only rename the PDFs brought into EndNote from this point forward. If you already have PDFs stored in the library their names would not be edited.

How to attach PDFs to references

Drag and drop

- Download the PDF to your computer and browse to display it in a window.
- Open your EndNote library.
- Drag and drop the PDF to the corresponding reference in the main pane of the EndNote library. Reduce the EndNote window to make this easier.
- When the PDF has been successfully stored in EndNote, a paper clip icon will appear.

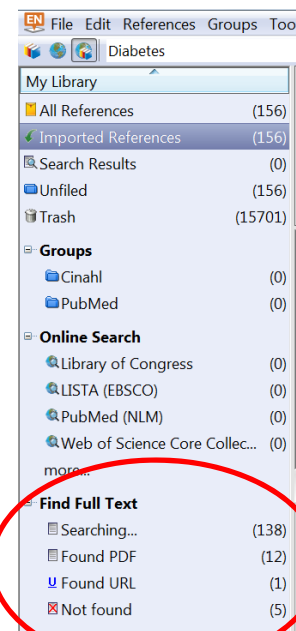


Author	Year	Title	Journal
Barrett, M. L.; Udani, J. K.	2011	A proprietary alpha-amylase inhibitor from white bean (Phaseolus ...	Nutr J
Benhalima, K.; Standl, E.; Mathi...	2011	The importance of glycemic control: how low should we go with H...	J Diabetes
Benzadon, M.; Forti, L.; Sinay, I.	2014	[Update on the diagnosis of diabetes]	Medicina (t
Berk, E. S.; Kovera, A. J.; Booze...	2006	Metabolic inflexibility in substrate use is present in African-America...	J Clin Endo
Beucher, G.; Viaris de Lesegno...	2010	[Maternal outcome of gestational diabetes mellitus]	J Gynecol C
Bissonnette, M. L. Z.; Chang, A...	2013	Leukemia and lymphoma-associated crescentic glomerulonephritis	Laboratory

Let EndNote automatically find and attach full text

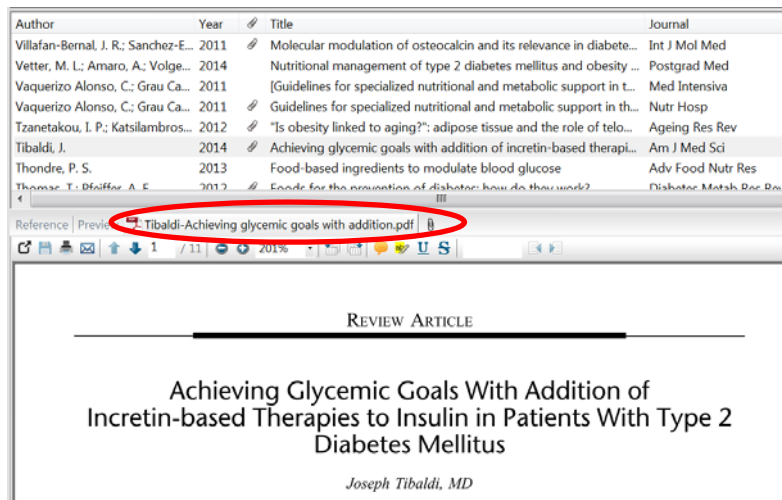
CAVEAT: Although easy, this does not work for all full text due to technical requirements. Be prepared to manually retrieve full text for some references. See also: *How Do I? Maximize full text retrieval in EndNote*: <http://bit.ly/1pRL15b>

- Using *Ctrl+click*, select one or more citations for which you want to download and attach full text.
- Click on *References, Find Full Text, Find Full Text*.
- EndNote will attempt to find as many full text PDFs as possible. Paper clip icons will appear in the record indicating the PDF has been attached (This may take a few minutes).
- The progress will be displayed in the **My Library** pane under **Find Full Text**.



Viewing PDFs in EndNote

- To view a PDF stored in EndNote, click on the reference of interest (with paper clip) to highlight it.
- Click on the name of the PDF which appears as a tab in the main panel below the reference list.



See salmon handout, *Converting PDFs into new EndNote library records*.

- The method above opens the PDF within in EndNote. To open the PDF in Adobe Acrobat, double-click on the reference to open the record. Scroll down to the **File Attachments** field and double-click on the PDF icon.