EndNote X8 Basics

Health Sciences Library System

University of Pittsburgh

Instructor Andrea Ketchum, MLIS / ketchum@pitt.edu



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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.



3

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

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	New Open Open Open	Library Shared Libra Recent	ıry	C	Ctrl+ trtl+Shift+	+0 +0 •
	Close	Library			Ctrl+	W
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	Print Print F Print S	Preview Setup			Ctrl	+P
	Comp	ressed Libra	ry (.enlx) .			
	Exit				Ctrl+	Q

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

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 our Managing References with EndNote guide:

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

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

Managing the EndNote Environment

Library basics

- On your Desktop click on the folder named HSLS Classes > EndNote X8 Diabetes, and find the diabetesX8 library (diabetesX8.enl).
- Double click on the **diabetesX8.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 panels: main, My Library, and Reference.
 There is also a Search Panel above the main panel.

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Unfiled (408	5)	And V Title		✓ Contains ✓				+ -
🗊 Trash (0	0)							
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Library of Congress ()	Annual S - Ray	2017	An Adult Health Care, Raved Perfective to Adult	Purpose The surpose of the study was to evaluate an adult health or	Conc.	https://www.achi.elm.ni	
GLISTA (EBSCO) (0	0	Al Hamid, A.; Gh	2014	A systematic review of qualitative research on	OBJECTIVES: To synthesise contributing factors leading to medicine-	-	Incipacy with white based of the	
PubMed (NLM) (0	3)	Alim, M. A.; Sikd	2017	Anti-mycobacterial function of macrophages is_	Type 2 diabetes (T2D) is one of the major risk factors for tuberculosi	L	https://www.ncbi.nlm.ni	
Web of Science Core (6	ומ	Alipoor, B.; Mesh	2016	Association of miR-146a rs2910164 and miR-1_	BACKGROUND: The deregulation of miRNAs has been implicated in	-	https://www.ncbi.nlm.ni	
more		Allister Price, C.;	2016	Understanding the Impact of Added Sugar Con	The association between dietary sugar and type 2 diabetes (T2D) is li	L	https://www.ncbi.nlm.ni	
□ Find Full Text		Al-Matubsi, H. Y	2016	Effects of Lipoic Acid Supplementation on Acti	Background. Our aim was to evaluate the protective effect of lipoic	-	https://www.ncbi.nlm.nl	
		Althouse, A. D.;	2014	Risk factors for incident peripheral arterial dis	OBJECTIVE: The aim of this article was to define risk factors for incid	L.		
		Antosik, K.; Boro	2016	Genetic Factors of Diabetes	Monogenic diabetes is a rare genetic type of diabetes caused by pan DUDDOCC. The sector sector (O(O) are the local sector (O(O)).	-	https://www.ncbi.nlm.ni	
		Arada Ma Moria	2014	Diasenine diabetic knowledge after 3-day teach	Aim Cla/tumor percent factor, related protein 9/CTPP0, a percent		https://www.achi.eles.ei	
		Aswar, U.: Chepg	2017	Telmisartan attenuates diabetes induced denr	BACKGROUND: Role of brain renin angiotensin system (RAS) is well	-	https://www.ocbi.nlm.ni	
		Azulay Chertok	2017	Influence of gestational diabetes mellitus on f	OBJECTIVE: The aim of this study was to examine differences in fatt.		https://www.ncbi.nlm.ni	
		Badedi, M.; Sola_	2016	Factors Associated with Long-Term Control of	Aims. This study assessed factors associated with glycemic control a.		https://www.ncbi.nlm.ni	
		Baghdadi, L. R.;	2015	The impact of traditional cardiovascular risk fa	BACKGROUND: Rheumatoid arthritis (RA) is known to increase the	-		
		Bailey, C. J.	2016	Under-treatment of type 2 diabetes: Causes an	AIMS: To assess the impact of clinical inertia on type 2 diabetes (T2D	-	https://www.ncbi.nlm.ni	
		Balti, E. V.; Echou	2014	Air pollution and risk of type 2 diabetes mellitu	AIM: Whether exposure to relatively high levels of air pollution is as	-		
		Banghoej, A. M.;	2017	Obstructive sleep apnoea is frequent in patien	AIM: Obstructive Sleep Apnoea (OSA) is frequent in patients with ty	-	https://www.ncbi.nlm.ni	-
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		1					1000	
Showing 406 of 406 references.							101	mont

- The main panel displays reference records divided into fields (author name, publication year, title, journal name, etc.) Click and drag a column divider to change the width of a field display. The paper clip field indicates an attachment to the record.
- The left **My Library** panel 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 **Reference** panel is for viewing records, previewing formatted citations, and displaying PDFs.
- The Search Panel will be discussed later in the lesson.

Sorting the library

- Sort the library by clicking on the desired field name in the main panel. 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.*

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: **diabetesX8.enl**).

Working with references

- Double-click on a reference in the main panel 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.

Pan, 2015 #523				
Attached PDFs	2			
E 2 8 5 % 6 5	Plain Font	▼ Plain Size ▼	3 Ι <u>U</u> Ρ Α ¹ Α ₁ Σ	Aa -
Reference Type: Journal Article	•			* -
Rating				
Author				
Pan, A. Wang, Y. Talaei, M. Hu, F. B.				
Year 2015				
Title Relation of Smoking With Total Mortality and	d Cardiovascular Events	Among Patients With Diabe	etes Mellitus: A Meta-Analysis and Sy	stematic Review
Journal Circulation				
Volume 132				
Issue 19				
Pages 1795-804				
Start Page				
Epub Date 2015/08/28				
Date				
Nov 10				
Type of Article				
Added to Library: 5/2/2018 Last Updated: 5/2	2/2018			Layout •

• 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.

ſ	Wew Reference
	Attached PDFs 🖉
	E 2 0 E 5 0 E 10 10 10 10 10 10 10 10 10 10 10 10 10
4	Reference Type: Journal Article
	Rating
	Author
	Year
	Title
	Journal
	Volume
	Issue
	Pages

- 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*). Corporate (organizational) authors should be entered with a comma after the last word to distinguish them 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.

New Reference	
Attached PDFs	
	Plain Font
Reference Type: Journal Article	
Rating	
Author Ruth Bader Ginsburg Clinton, Hilary Rodham World Health Organization,	
Year 2011	
Title	
Journal	
Volume	
Issue	

- 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 2016.

• Click in the Search Panel above the references.

Search Options +			
Any Field	✓ Contains	~	smoking
And V Year	✓ Is less than or equal to	~	2016

- 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 *2016* in the next line.

- *And* in the first window of the row ensures that both *smoking* and *2016* will be included in the search:
- Click the *Search* button. The search results are displayed in the main pane.

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 Reference panel:

- Use the drop down menu in the EndNote toolbar to select the style you would like to use.
- In the main panel, click on a record, then on the *Preview* tab in the Reference panel to display the reference in the current style. (You can preview only one at a time).

diabetesX8 m diabetesX8 m diabetes diabe	
Recently Added (406)	Ang Year Contains I +
Unfiled (406)	And V Title V Contains V +
U Trash (0) ⊡- My Groups ⊡- Online Search	
Library of Congress (0) LiSTA (EBSCO) (0) PubMed (NLM) (0) Web of Science Core (0) more Find Full Text	Author Year Title Abstract Author Year Title Abstract Author Abstract Abstrat
	1. Courcoulas AP, Goodpaster BH, Eagleton JK, Belle SH, Kalarchian MA, Lang W, Toledo FG, Jakicic JM: Surgical vs medical treatments for type 2 diabetes mellitus: a randomized clinical trial. JAMA surgery 2014;149:707-715

• If *Preview* tab is not visible, click on the *Layou*t box at the very bottom of the screen. Choose location for Reference Panel.

Coblijn, U. K.; Go 2014 Development of ulcer disease after Roux-en-Y gastr Laparoscopic Roux-en-Y gastric bypass (LRYGB) is the gold standard i.	
Courcoulas, A. P.; 2014 Surgical vs medical treatments for type 2 diabetes IMPORTANCE: Many questions remain unanswered about the role of Daviglus, M. L.; P 2014 Cardiovascular disease risk factors in the Hispanic/La IMPORTANCE: Many questions remain unanswered about the role of Daviglus, M. L.; P 2014 Cardiovascular disease risk factors in the Hispanic/La Cardiovascular disease (CVD) is one of the leading causes of mortalit Deb, S.; Singh, S 2014 Long-term impact of diabetes on graft patency a OBJECTIVES: We investigated whether metformin can improve end, Eermonder: Purct 2014 Chronic inflammatory direases and the Acute Respire The Acute Respire The Acut	Groups Panel Left Off
Reference Preview Duttached PDFs @ 1. Courcoulas AP, Goodpaster BH, Eagleton JK, Belle SH, Kalarchian MA, Lang W, Toledo FG, Jakicir, JM: Surgical vs medical treatments for type 2 diabetes mellitus: a range	Reference Panel Right Right - Split
2014/149:707-715	Bottom - Split Off
	Layout 🔻 📑

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.

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: Search using PubMed unique identifier (PMID).

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:

- In Integrated search mode, records retrieved by searching online databases are automatically added into your EndNote Library. In Online search mode, they are not. We will use Online mode.
- 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.

Online Mode		
Diabetes	🖬 🖪 🔍 🕹 순 & 🖉 🗗 💴 🗟 💷 💭 &	? [»]
My Library	Search Options Search Remote Library Match Case Match	Words
Online References	(0) PMID ~ Contains ~ 23597801	+ •
- Online Search	And ~ Year Contains And ~ Title Contains	+ -
Q LISTA (EBSCO)	(0) (0) (0) (0) (0) (0) (0) (0) (0) (0)	
Q PubMed (NLM)		
more	Author Year Title	Abstra

Searching the online database with EndNote

- Click on *PubMed (NLM)* in the **Online Search** section of your **My Library** panel.
 - 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 Panel**, 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.

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Online Mode							
Diabetes		• 🖻 🖳	S 2 û	\otimes) 💴 🗟 📾 💭 🏝 🕥 "		
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		And 🗸 Year	~	Contains	~ + -		
Online Search		And × Title	~	Contains	× + -		
🔍 Library of Congress	(0)			contains			
🔍 LISTA (EBSCO)	(0)						
🔍 PubMed (NLM)	(1)						
🔍 Web of Science Core	(0)				D 10		
more		@ Author	Year Title		Record Summary		
		Clair C : Meios J	2013 Smol	king behavior am	New Reference		
		ciun, ci, meiga, ani	LUIS SIIO		Edit References		
					Move References to Trash		
					Add References To	>	
					Copy References To	>	New Library
					E-mail Reference		Choose Library
					Remove Reference(s) From Group		diabetesX8.enl

• Right click on the desired records. From the pop-up menu, choose *Copy References To >> diabetesX8.enl.*

See tan handout, Searching PITTCat Records in EndNote X8.

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.

Searching PubMed

- First, create a new library by clicking *File, New.* Choose where to save the file, then name the library.
- On the HSLS homepage, www.hsls.pitt.edu. Click on PubMed in the Resources list.
- Perform a PubMed search as usual.
- Scroll through the retrieved references. Click in the check box to the left of each one you want to import into EndNote.

If you have \leq 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 using **Firefox**, you will see the pop-up box below for the citations.nbib file.

(Opening citations.nbib	x
	You have chosen to open:	
1	🕱 citations.nbib	
	which is a: NBIB Formatted File (PubMed)	
l	from: http://www.ncbi.nlm.nih.gov	
	What should Firefox do with this file?	
1	Orace with Research Coft Direct Execut Unlaws (default)	
	Copen with Researchsoft Direct Export Heiper (default)	
	Save File	
	Do this <u>a</u> utomatically for files like this from now on.	
	\frown	
1	OK Can	cel

Select *Open with* and make sure the drop down menu says *ResearchSoft Direct Export Helper (default)* or *EndNote X8* (specific version listed will vary). Click *OK*.

References will automatically go into the open EndNote library.



If you are using **Chrome**, the .nbib file will appear at the bottom of the screen. Click on it to send your references into the open EndNote library.

Pub Med.cov	PubMed viaglo roo
US National Library of Medicine	Create PSS
National Institutes of Health	Greate RSS
Article types	Format: Summary - Sort
Clinical Trial	
Customize	Search results
Taut availability	Items: 12
Abstract	10110.12
Free full text	_
Full text	Polytolerance to abic
Publication dates	I. <u>species?</u>
5 years	Clob Ecol Biogeogr 201
10 years	PMID: 29367836 Free
Custom range	Similar articles
Species	
Humans	Diagnostics in venou
Other Animals	 Lippi G, Danese E, F
01	Semin Thromb Hemost.
<u>Ciear all</u>	Similar articles
Show additional filters	<u></u>
	Materials science. P
	 Russell TP.
	Science. 2013 Sep 20;3
	PMID: 24052297
	Similar articles
	Reform by subtractic
	4. reservations.
	Room R.
	Int J Drug Policy. 2012
	PMID: 22613198
	Similar articles
	Phase diagram of has a second seco
	5. Haji-Akbari A, Engel
	J Chem Phys. 2011 No
	PMID: 22112060
	Similar anicies
	Visual cortex: more
	6. Swindale NV.
	Curr Biol. 2007 Dec 18;
	PMID: 18088589 Fre
	Similar articles



If you are searching PubMed using **Internet Explorer**, you will not see the .nbib file. Once you click on the *Create File* button, references will automatically go into the open EndNote library.

If you have \geq 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.

Create File

• Choose **MEDLINE** as Format. Then click on the *Create File* button.

Choose Destination				
File	Clipboard			
Collections	E-mail			
Order	My Bibliography			
Citation manager				
Download 251 items Format MEDLINE • Sort by Most Recent				





If you are searching PubMed using **Firefox,** you will again see a pop-up box, but this time the file will be named pubmed_result.txt. Proceed the same way you did with ≤ 200 citations above. References again go into your open library.



With Chrome, the file at the bottom of the screen will be pubmed_result.txt. Process it the same way you did with \leq 200 citations above to send your references to the open library.



If you are searching PubMed using **Internet Explorer**, you will see a pop-up box at the bottom of your screen once you click the *Create File* button.

Choose *Save as* from the drop down menu so you can control where the pubmed_result.txt file will be saved.

6	Maternal urinary triclosan level, gestational diabetes mellitus and birth weight in Chinese women. Ouvang E, Tang N, Zhang HJ, Wang X, Zhao S, Wang W, Zhang J, Cheng W	("smoking"'' OR "smoki	Save Save as
	Do you want to open or save pubmed_result.txt from ncbi.nlm.nih.gov? Open	Save 🔻	Save and open

- You now have to import this saved file into EndNote.
 - o With your library open in EndNote, open the Import dialog box by choosing *File, Import, File...*
 - In the pop-up box (below), click on the *Choose* button. Locate and open the pubmed_result.txt file you saved in Internet Explorer.
 - For *Import Option*, choose PubMed (NLM). (If it is 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 be added successfully to the library.

	E w
pubmed_result.txt	Choose
PubMed (NLM)	•
Import All	•
No Translation	•
	pubmed_result.txt PubMed (NLM) Import All No Translation

Turning off automatic PDF importing

• When importing citations using the *Import* dialog box, EndNote will by default automatically look for and add available full text PDFs of the first 1,000 citations. While this may sound quite convenient, it slows the import process down considerably. Besides, you can easily search for PDFs later as will be shown in Lesson 6 below.

• To turn this option off:



• In EndNote, choose *Edit*, then *Preferences*.

• 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*.

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 panel and select *Add References To.* Click on the name of the group.



 References are copied into groups and but remain in your All References Folder as well. Removing references from a group does not remove them from your library.

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 2016

- In C:\EndNote Diabetes X8, open paperX8.docx in Word 2016. Note bracketed reference information placeholders.
- Click on the EndNote X8 tab at top right to display Word's EndNote X8 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 **diabetesX8.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 paperX8.docx.

- In the **EndNote X8 toolbar**, click on the drop down arrow next to the **Insert Citation** icon, then *Insert Citation* or *Insert Selected Citation(s)*.
- Do you see in-text citations and corresponding bibliography entries formatted in the current EndNote style, which is *Endocrine Reviews*? If you still only see the bracketed reference information placeholders:
 - O Click on Update Citations and Bibliography (below) for one-time automatic formatting.

File	Home	Insert	Design	Layout	References	Mailings	Review	View	EndN	ote X8
四	💿 Go to En	dNote	9	Style: Diabete	s	*	Categoriz	e Referenc	es *	🗐 Exp
Insert	Edit & N R Edit Libr	1anage Cita arv Referen	ition(s)	Convert Cit	ations and Bibli tations and Bibl	ography	🙂 Instant Fo	ormatting i	s Off ▼	Pref
Citation	Citatio	ns			I	Bibliography			E.	Ĩ

• To enable automatic formatting in the future, click on the drop down arrow next to Instant Formatting is Off (above) and select Turn Instant Formatting On.

Selecting citations from Word

- In Word, click at the desired insertion point in **paperX8.docx**.
- In the EndNote X8 toolbar, click on the arrow next to the Insert Citation icon, then Insert Citation.
- In the EndNote X8 Find & Insert My References dialog box, enter terms (author, subject, title, textwords, etc.) to identify citations of interest in the diabetesX8 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

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- Currently our references are displayed in the *Diabetes* output style. To change the style, click on the drop down arrow next to the Style window in the **EndNote X8 toolbar**.
- Select another output style from the drop down menu or choose Select Another Style for more options.

Deleting Citations

- Highlight the in-text citation you want to delete in the main body of the paper and hit the *Delete* key. Then, use *Update Citations and Bibliography* so that the citation will be deleted from the reference list at the end of the paper.
- If the citation is unformatted, then deleting the citation placeholder will be sufficient
- Alternatively, use the *Edit & Manage Citation(s)* function in the **EndNote X8 toolbar**.

Converting to Plain Text

• Submission of a manuscript for publication often requires that EndNote field codes be removed. In the **EndNote X8 toolbar**, click on *Convert Citations and Bibliography, Convert to Plain Text*.



EndNote X	
	This command will create a new copy of your Word document and remove all special EndNote markers from it. The new document will appear in a new unsaved document window. The original file will remain opened and untouched. Do you wish to continue?
	OK Cancel

• You will see the pop-up box above. Click *OK* and give your file a new name. You will now have two copies of your document: one with field codes (to make EndNote-linked 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.

See blue handout, Support Web Sites for Pitt EndNote Users.

Storing PDFs in EndNote

Note: While PDFs are the most popular type of attachment in 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. Use EndNote's Compressed Library feature to overcome this. (This is also 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 X8 allows automatic renaming of PDFs stored in the program.

- To automatically give meaningful file names to PDFs within EndNote, choose *Edit, Preferences, PDF Handling*.
- Change *Don't Rename* to your preferred file naming format. Click *OK*.
- Note: This will only rename PDFs added to EndNote from this point forward. If you already have PDFs stored in the library, their names will not be changed.



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

Let EndNote automatically find and attach full text

CAVEAT: This is easy but typically does not work for many documents. Be prepared to manually retrieve full text for some references. See: Maximize full text

retrieval in EndNote: <u>https://bit.ly/2FJuHCp</u>

- 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** panel 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 PDF file name, which appears as a tab in the **Reference** panel.



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

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