EndNote X8 Basics

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C o n t e n t s

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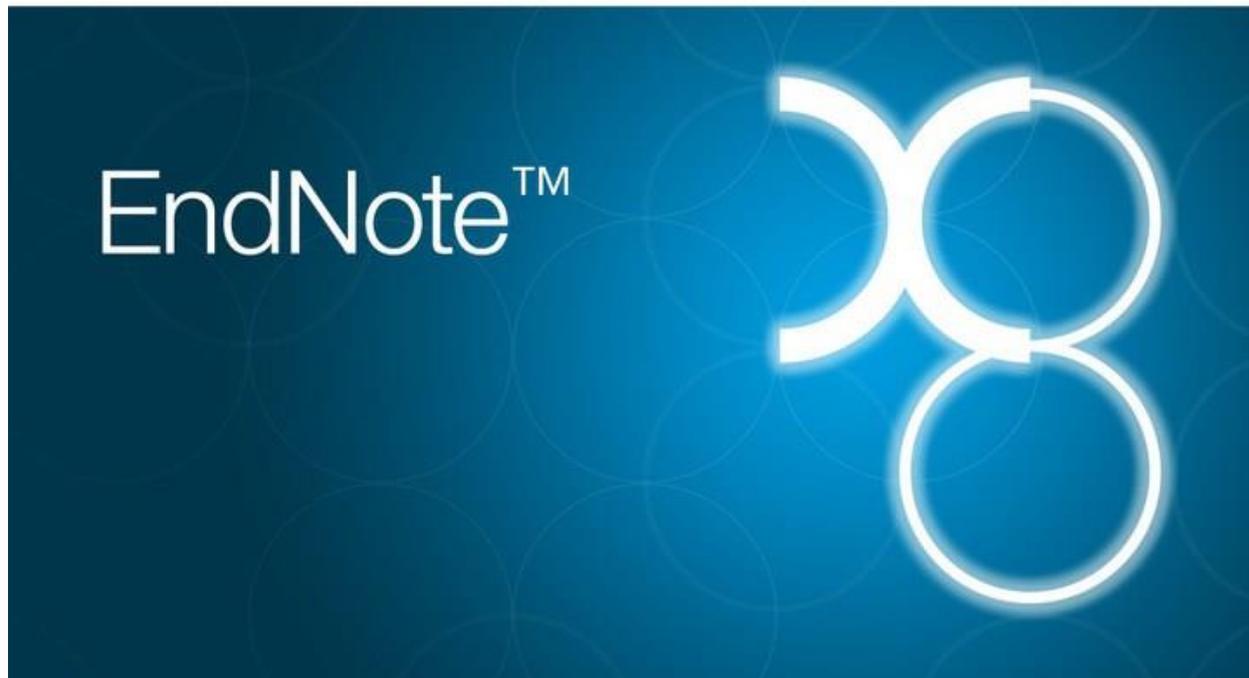
L e s s o n   1

E n d N o t e   E l e m e n t s

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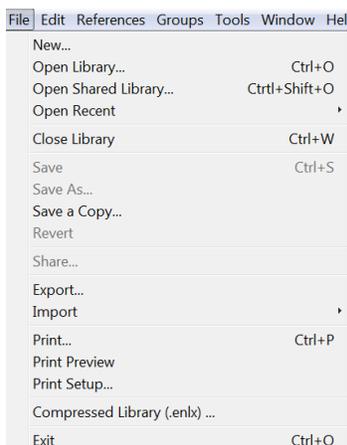
The *File* menu includes options specific to EndNote library files as well as general commands.

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

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

Search for Help on...	F1
Getting Started with EndNote	
Online User Guide	
Get Technical Support	
EndNote Output Styles	
Check for Updates...	
EndNote Community	
Search Knowledgebase	
EndNote Tutorials and More	
EndNote online	
Download EndNote Plug-in	
Welcome to EndNote	
Activate EndNote	
About EndNote X8...	
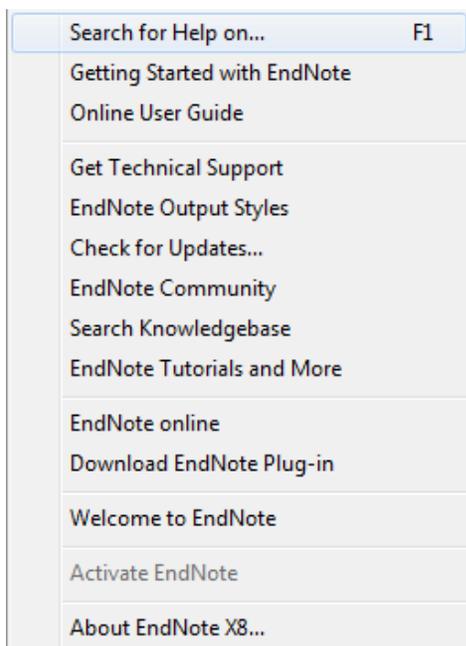
- The *Help* menu includes links to Windows and Mac user guides, tutorials, and other useful resources.

- 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.*

Lesson 2

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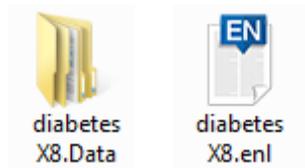
- Note that every Endnote library consists of two elements: the library itself (.enl) and a .Data folder with the same name.

The library window

- The Library window has three panels: main, **My Library**, and **Reference**. There is also a **Search Panel** above the main panel.
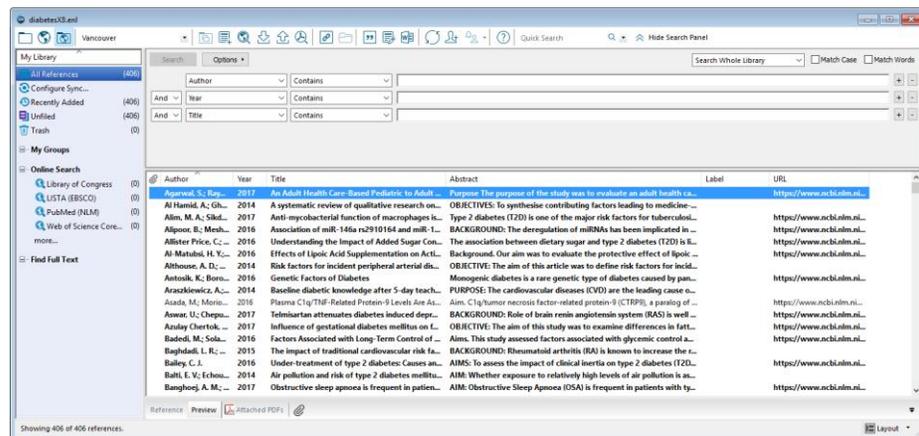
- The main panel displays reference records divided into fields (author name, publication year, title, journal name, etc.) Click and drag a column divider to change the width of a field display. The paper clip field indicates an attachment to the record.

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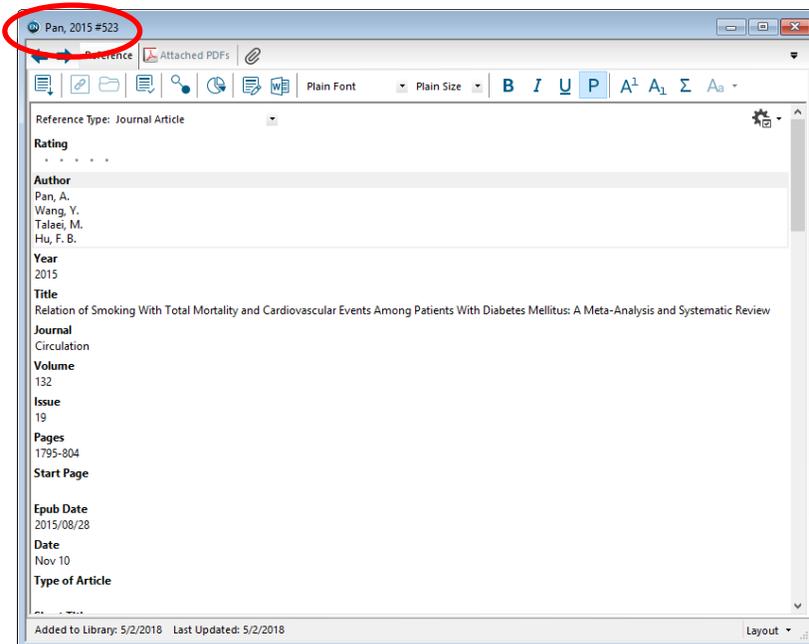
- Close the reference by clicking on the **X** in the upper right corner. Save changes as you are prompted.

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.
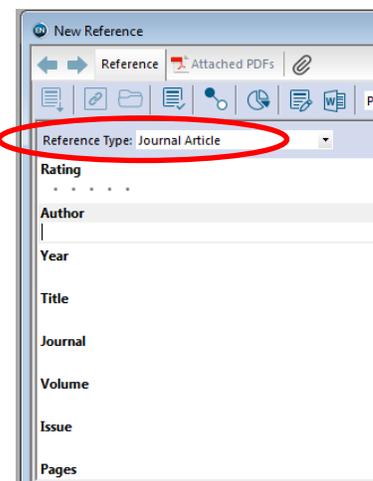
- Enter reference information starting with author names. Names can be entered two ways: either First Middle Last (*Ruth Bader Ginsberg*) or Last, First Middle (*Ginsberg, Ruth Bader*). Corporate (organizational) authors should be entered with a comma after the last word to distinguish them from a person's name (*World Health Organization,*).
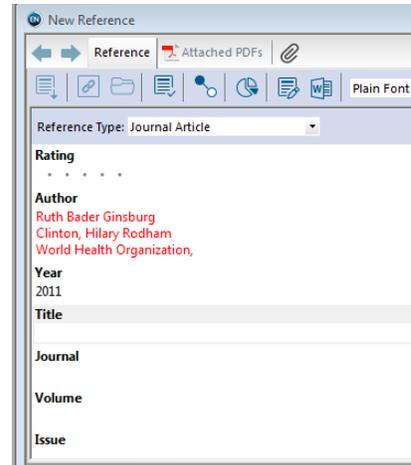
- Author names must be entered one per line. With the cursor in the *Author* field, type the first author's name, then press the *Enter* key. Continue entering author names, one per line.

- 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.

- 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).

- If *Preview* tab is not visible, click on the *Layout* box at the very bottom of the screen. Choose location for Reference Panel.
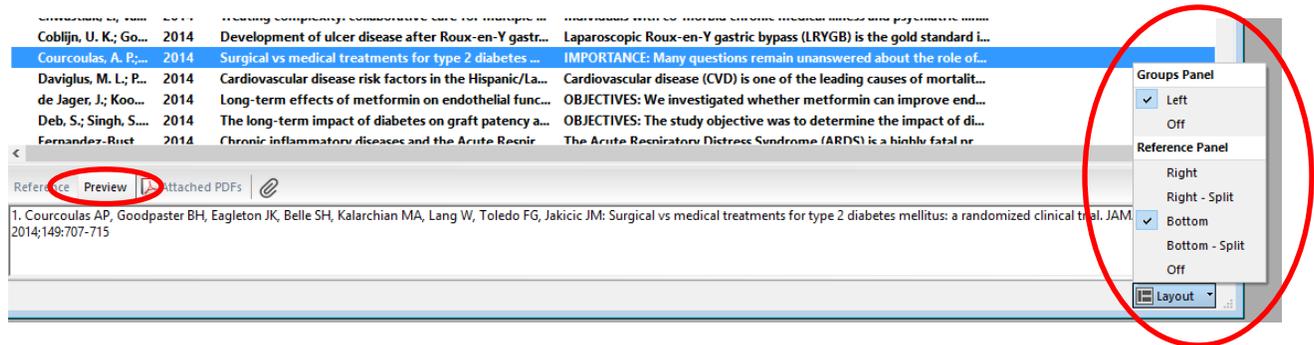
Returning to the complete library

- 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: 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).

Online Search Mode (Temporary Library)

Integrated Library & Online Search Mode
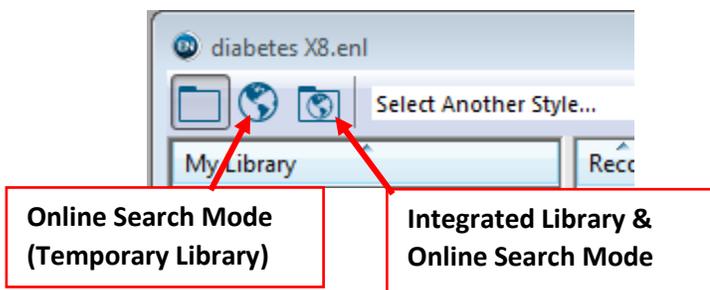
- **You must connect to either a free database product** (examples: PubMed, PITTCat) or one that HSLS subscribes to (example: OvidSP MEDLINE).

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.
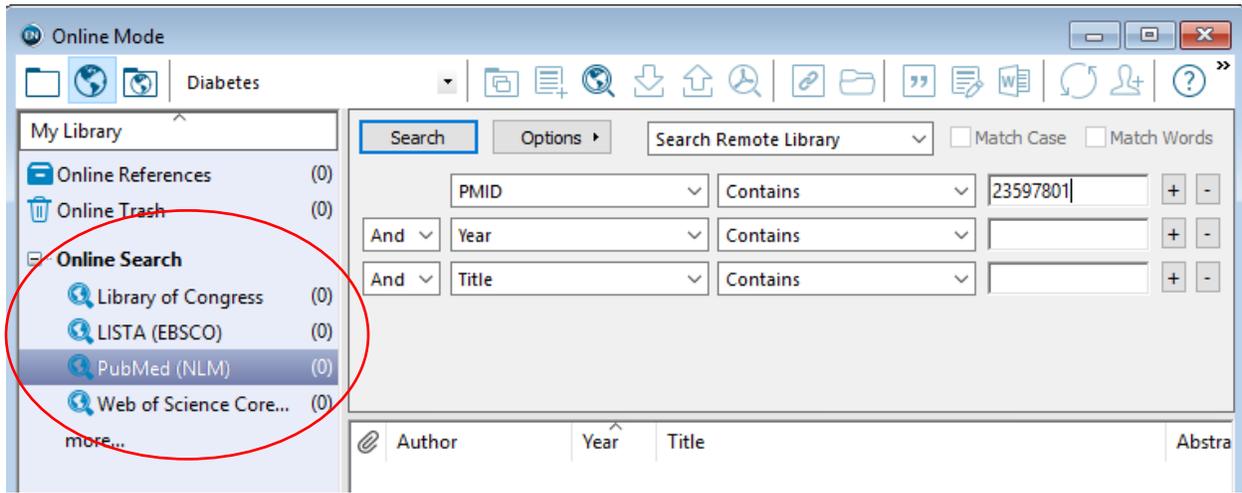
Searching the online database with EndNote

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

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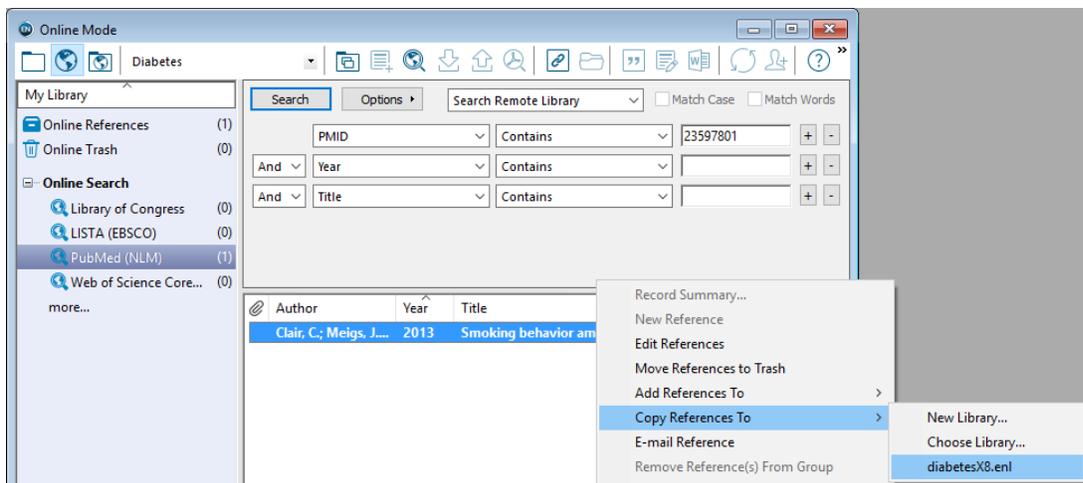
- Right click on the desired records. From the pop-up menu, choose *Copy References To >> diabetesX8.enl.*

See tan handout, *Searching PITTCat Records in EndNote X8***.**

L e s s o n   4

F i n d i n g   N e w   R e f e r e n c e s   f r o m
O u t s i d e   E n d N o t e

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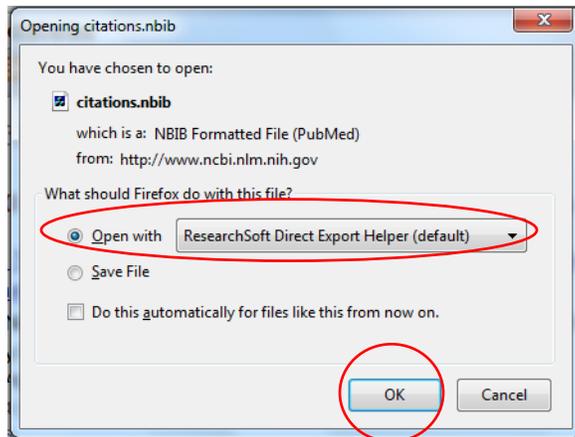
Select *Open with* and make sure the drop down menu says *ResearchSoft Direct Export Helper (default)* or *EndNote X8* (specific version listed will vary). Click *OK*.

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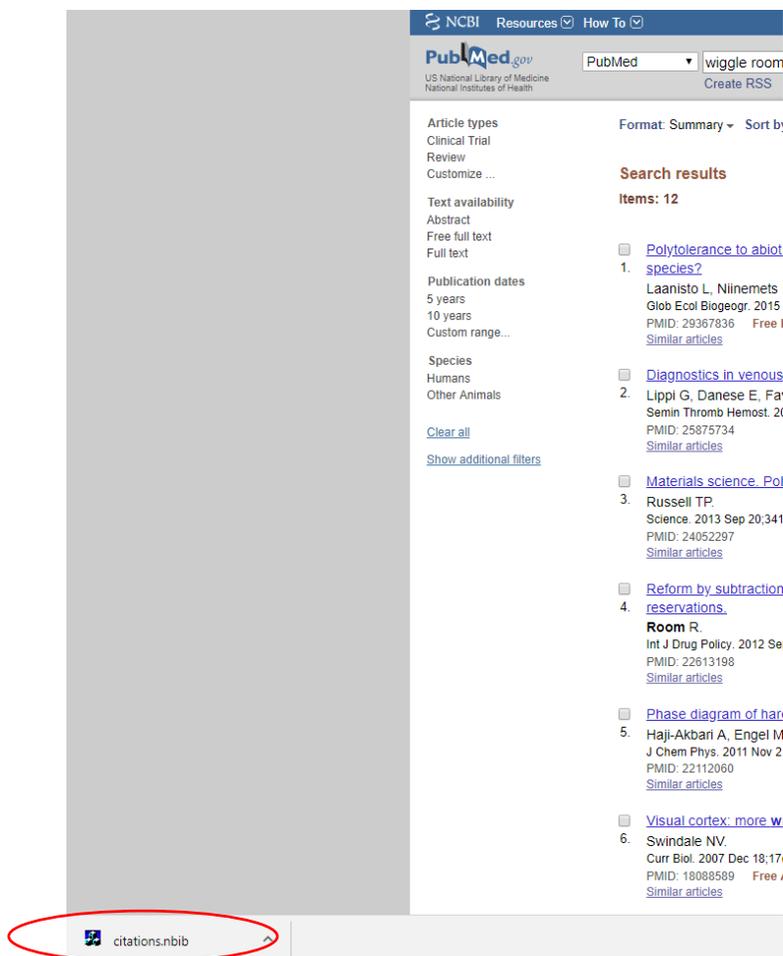
If you are searching PubMed using **Internet Explorer,** you will not see the .nbib file. Once you click on the *Create File* button, references will automatically go into the open EndNote library.

If you have ≥ 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.

Choose Destination

◉ File   ○ Clipboard
○ Collections   ○ E-mail
○ Order   ○ My Bibliography
○ Citation manager

Download 251 items.

Format
MEDLINE ▾

Sort by
Most Recent ▾

[Create File]

Opening pubmed_result.txt

You have chosen to open:

📄 **pubmed_result.txt**

    which is: Text Document
    from: https://www.ncbi.nlm.nih.gov

What should Firefox do with this file?

◉ Open with   EndNote X8 (Bld 10063) ▾
○ Save File

☐ Do this automatically for files like this from now on.

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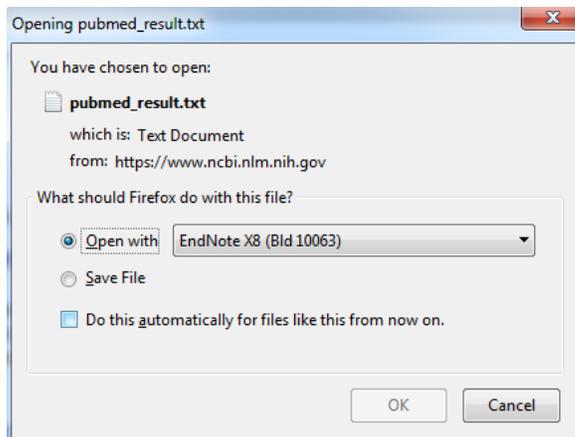
If you are searching PubMed using **Firefox,** you will again see a pop-up box, but this time the file will be named pubmed_result.txt. Proceed the same way you did with ≤ 200 citations above. References again go into your open library.

With Chrome, the file at the bottom of the screen will be pubmed_result.txt. Process it the same way you did with ≤ 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.

- **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…*

    o In the pop-up box (below), click on the *Choose* button. Locate and open the pubmed_result.txt file you saved in Internet Explorer.

    o 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.
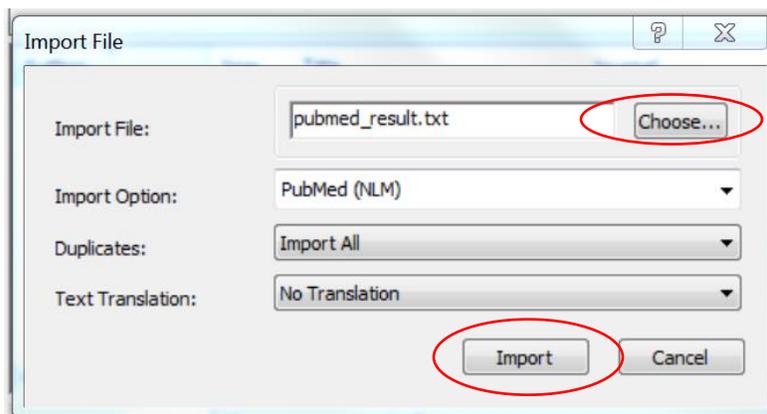
Turning off automatic PDF importing

- 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:
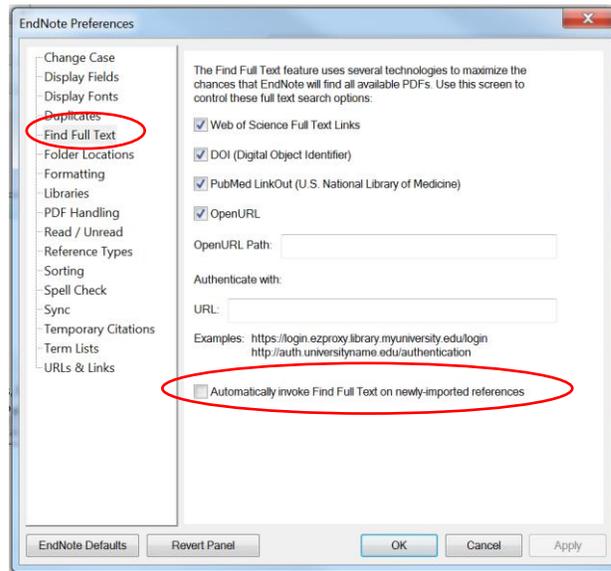
o In EndNote, choose *Edit*, then *Preferences.*

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*.

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.
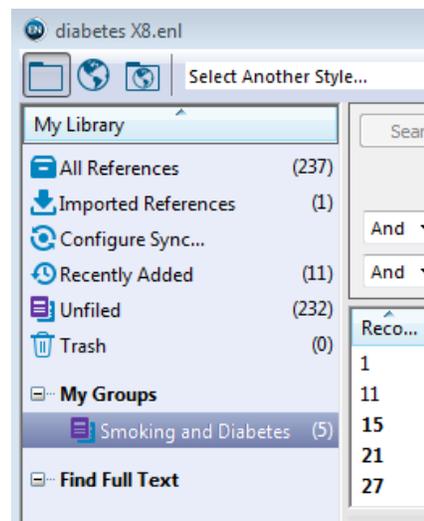
L e s s o n   5

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 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**.
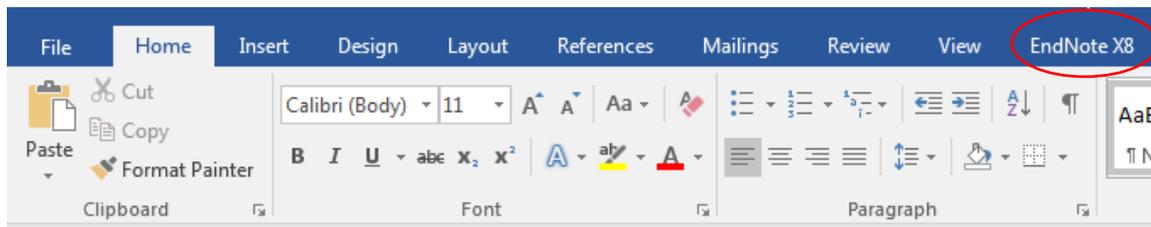
Adding citations to the paper

- 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.

  o 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
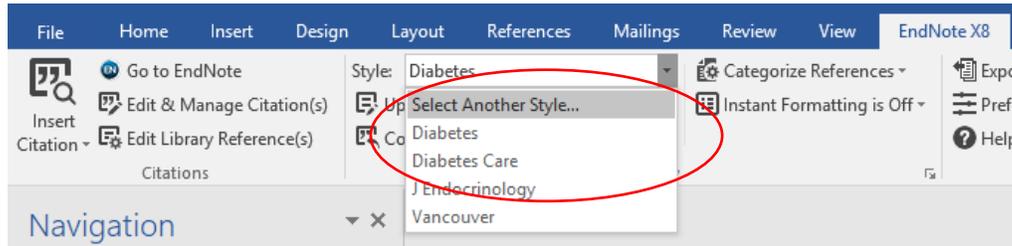
- Currently our references are displayed in the *Diabetes* output style. To change the style, click on the drop down arrow next to the Style window in the **EndNote X8 toolbar**.

- 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*.
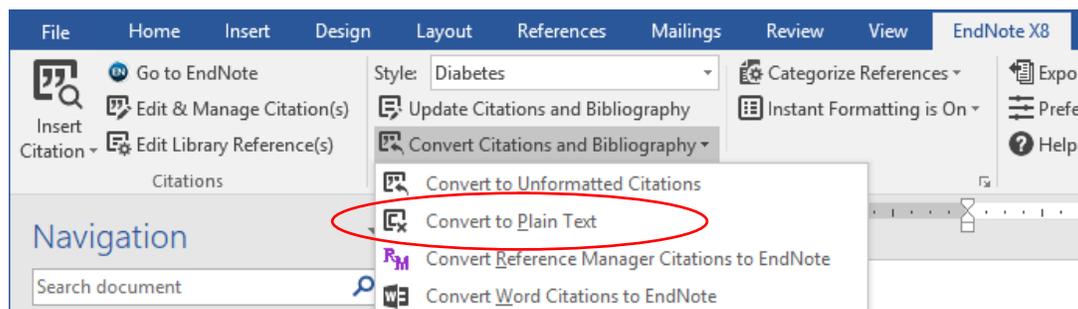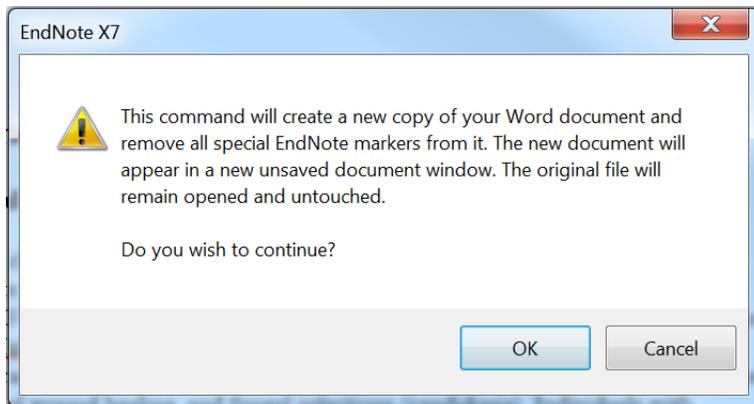
- You will see the pop-up box above. Click *OK* and give your file a new name. You will now have two copies of your document: one with field codes (to make EndNote-linked changes to your in-text citations or bibliography) and one without (for submission to publication).

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*.

L e s s o n   6

S t o r i n g   P D F s   i n   E n d N o t e

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).

  o 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.
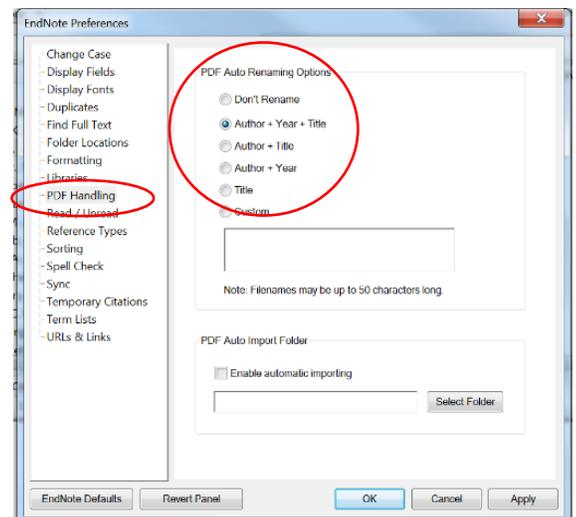
Attaching PDFs to references

Drag and drop
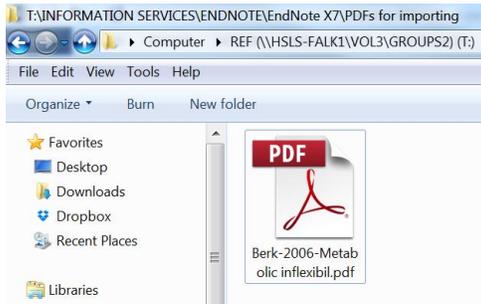
- Download the PDF to your computer and browse to display it in a window.

- 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.

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*: https://bit.ly/2FJuHCp

- 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**.
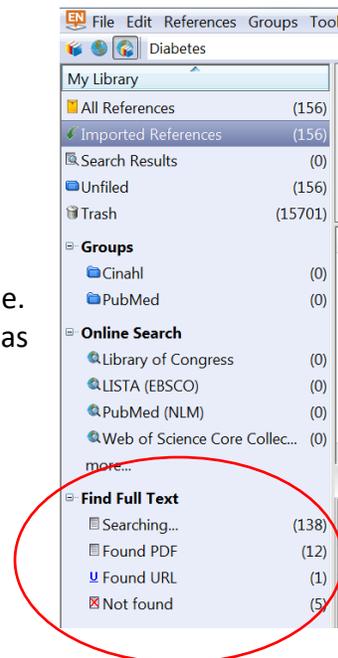
Viewing PDFs in EndNote

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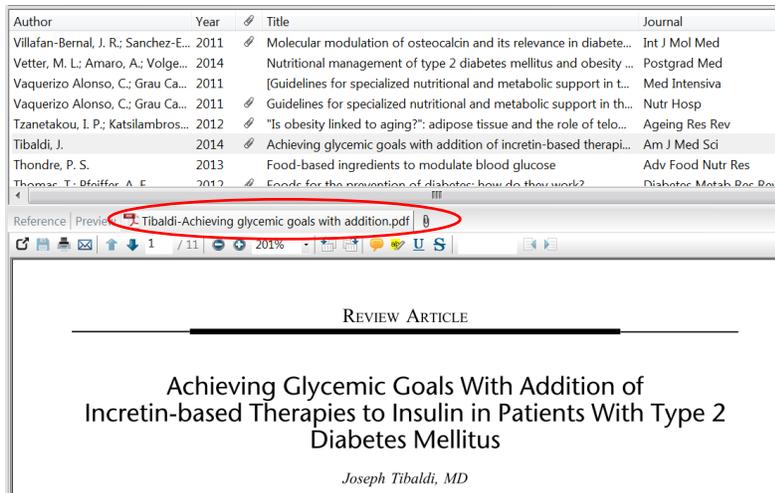
- This method opens the PDF within in EndNote. To open the PDF in Adobe Acrobat, double-click on the reference to open its EndNote record. Scroll down to the **File Attachments** field and double-click on the PDF icon.

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