ENDNOTE ⟹ X

Export an Endnote X6 Library to Excel

Based on *Getting Started EndNote X5* by Sue London and Rick Ralston

Ruth Lilly Medical Library at Indiana University, 2012. (pages 23-25)

http://bit.ly/1bFo2pR

1. Choose Tab Delimited style in the Style Manager in EndNote. If not available, find it in Style Manager via the Edit menu. (Edit>Output Styles>Open Style Manager. Find Tab Delimited style in list, checkmark, close edit window: it will now be available.)
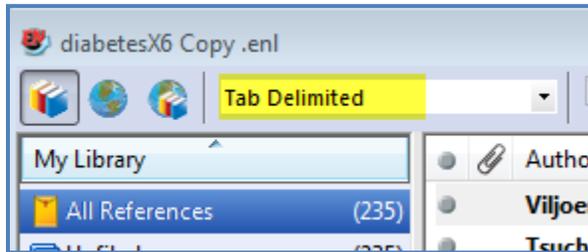
2. Go to Edit > Output Styles > Edit Tab Delimited.
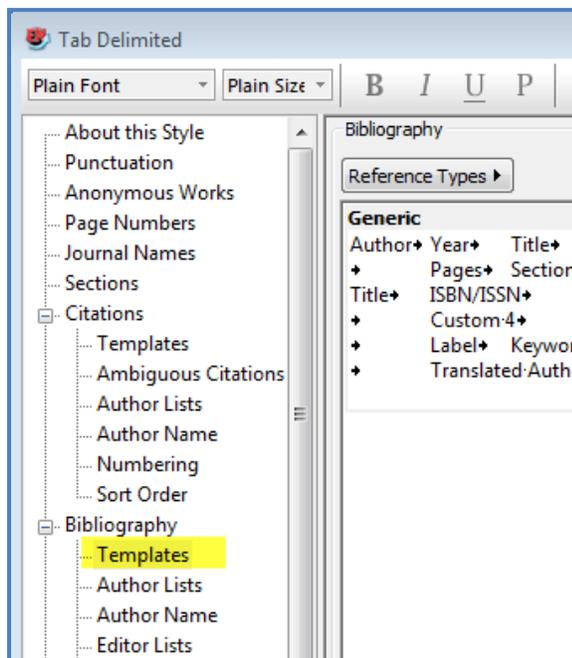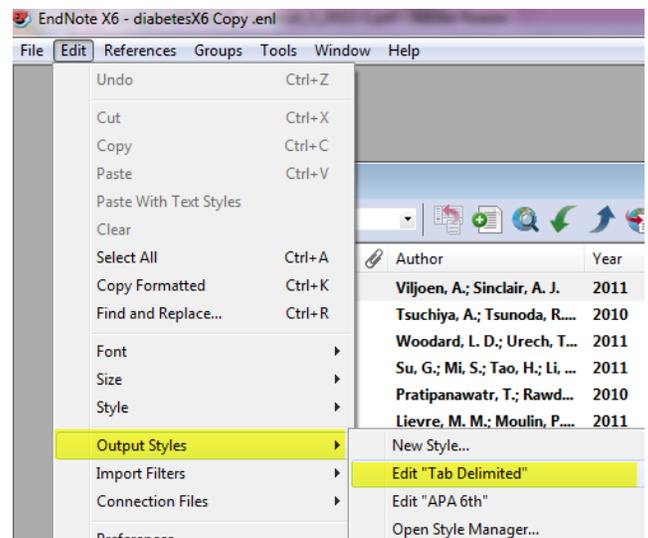
3. In the Tab Delimited edit window click on Bibliography > Templates.

3. A new template must be created for each type of reference (journal, book, etc.) that you want to export to Excel. In this example, the Reference Type *journal article* was chosen by using the pull-down menu and then clicking on **Journal Article**.

   Note: Different reference types have different fields that you may want to include in your spreadsheet.
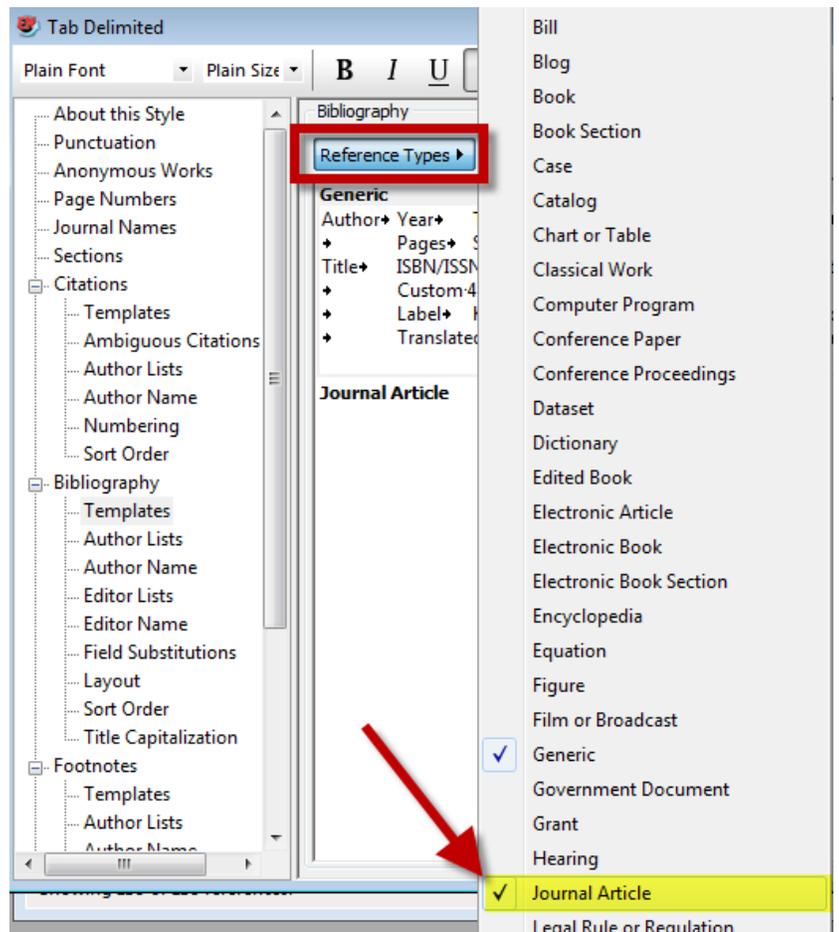
5. Build the Journal Article template first. The following nine fields were entered to create a new template by clicking on the Insert Field button in the upper right corner of the edit window: Author - Year - Title - Journal - Volume - Issue - Pages - Accession Number - URL
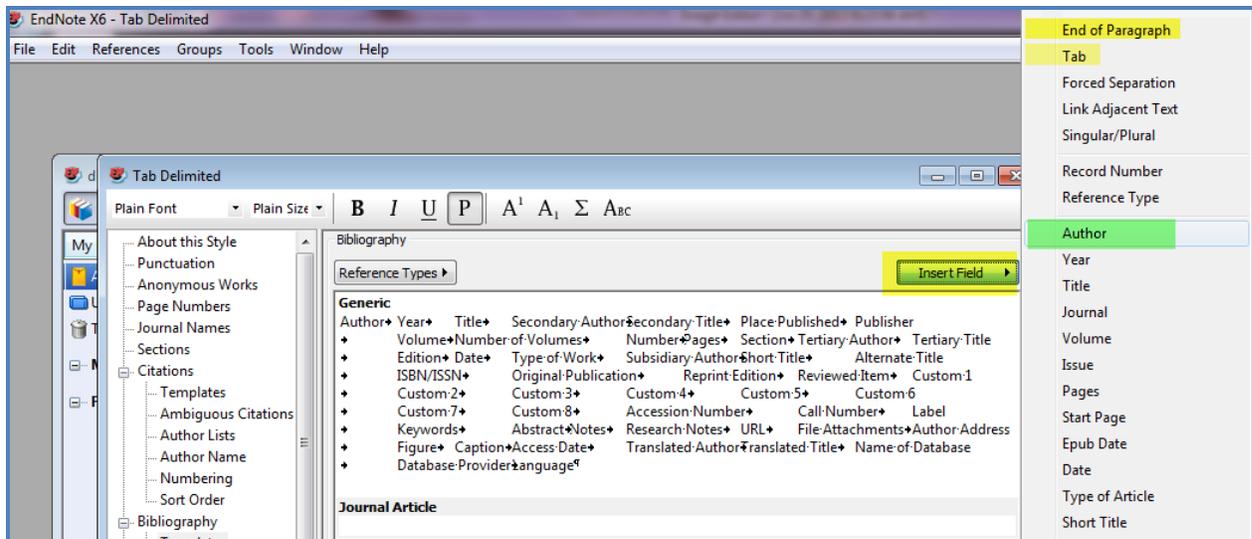
6. Each field name <u>must</u> be followed by a Tab character (➔). Click on the Insert Field button and select Tab after each field.

7. After the last field, instead of the Tab, insert the "End of Paragraph" character (¶) using the Insert Field button.

Journal Article
Author➜ Year➜   Title➜   Journal➜ Volume➜Issue➜   Pages➜ Accession·Number➜   URL¶
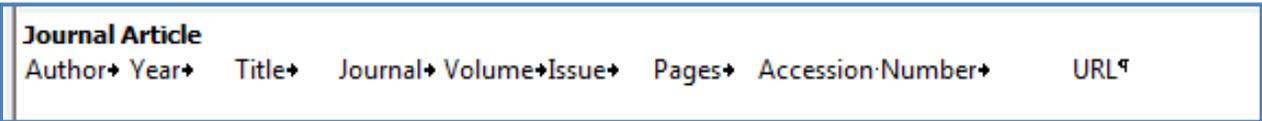
8. Repeat the process for each Reference Type (book, newspaper article, grant, etc.) that you want to export into Excel.

9. After all of the reference tab-delimited types desired have been created, save the new style you have created with a unique name. (File>Save As>)

Save As

Style name: Tab Delimited Excel Export   Save

                                              Cancel
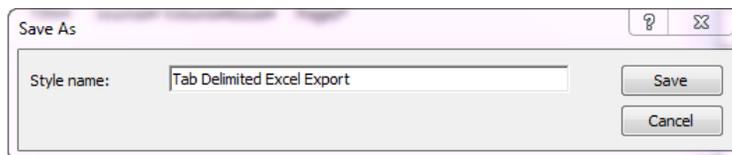
10. Now make your new EndNote style available as you work:
Go to Edit > Output Styles >Open Style Manager. From the EndNote Styles dialog box, find your new style and checkmark. Close the dialog box. The style is now available for use in the open EndNote program.

TIP: EndNote Excel Export style is a tool for creating Excel spreadsheets rather than bibliographies. When building a template, include fields that may be useful beyond bibliographic use, such as abstract, label, and notes.

HOWEVER, some fields unexpectedly create problems in the import process, such as the *keywords* field. Be prepared to eliminate fields from your style if your import is not working properly!

11. Back in EndNote, choose the new style that you have created and then select the reference(s) you want to export into Excel.

12. From the Edit menu, choose Copy Formatted.
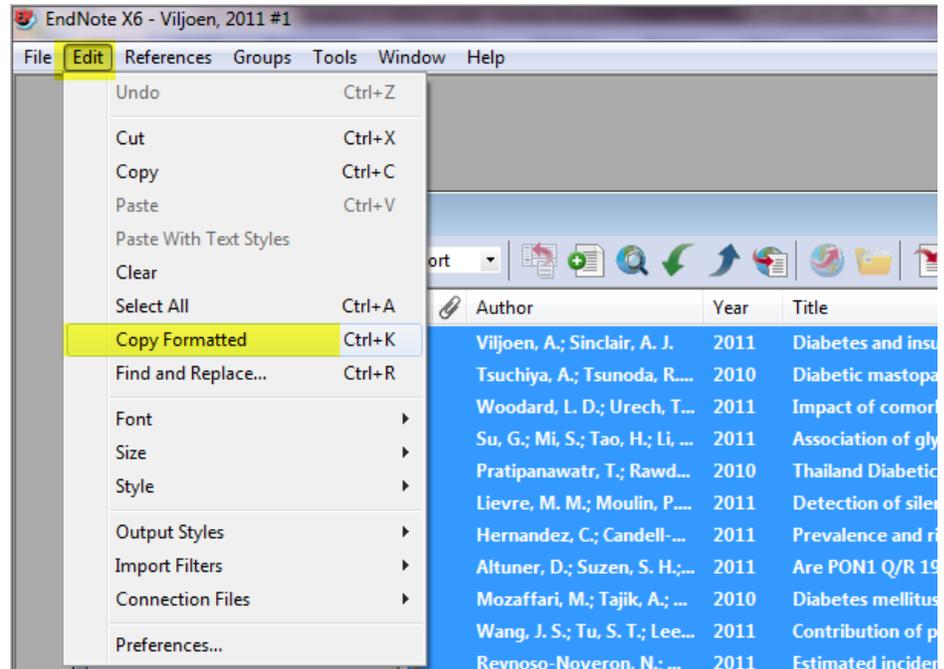
13. Open a blank workbook in Excel and paste (Ctrl+V) your saved references into the blank workbook.

14. Insert column headings as desired.