EndNote Desktop
Class Outline

1   Overview

1.1   Why Use EndNote

- EndNote can create bibliographies according to the rules of thousands of journal styles.
- EndNote is a searchable database to track your references, as well as your personal notes on the reference, the abstract, the author's address, and full-text PDF copies of the articles or books you are citing.
- EndNote includes built-in reading and annotation tools for PDFs.
- EndNote allows you to find full-text articles online that match your references, and automatically download and attach them to your records.
- EndNote can search for updated information on your records, and merge it with your existing records.
- When using EndNote online you can access and work with your references from anywhere with an Internet connection, share those references with other EndNote users anywhere in the world, and synchronize your references and custom groups between different desktop computers.

1.2   EndNote Requirements

1.2.1   *Windows (EndNote X7)*

- Windows XP SP3, Windows Vista, Windows 7, or Windows 8
- 450 MHz or higher Pentium-class CPU
- 256 MB of available RAM
- 400 MB of free disk space

1.2.2   *Macintosh (EndNote X7)*

- OS 10.6-10.8
- Intel-based Mac
- 512 MB of available RAM
- 400MB of free disk space

1.3   Word Processor Compatibility

1.3.1   *Windows*

- Cite While You Write — Microsoft Word 2007, 2010, or 2013
- Apache OpenOffice 3
- Wolfram Mathematica 8
- Format Paper feature works with any word processor capable of producing rich text format (RTF) documents, and Open Office files saved in the Open Document Type (ODT)

1.3.2 Macintosh

- Cite While You Write — Microsoft Word 2008, 2011
- Pages '09
- Format Paper feature works with rich text format (.RTF) documents produced by any word processor

1.4   General Information

- Allows creation of an unlimited number of personal databases (called "libraries" in EndNote), but it is best to use just one library and organize references into groups
- You can synchronize only one EndNote desktop library and make it available online.
- Windows and Macintosh libraries are compatible
- Each library can contain an unlimited number of references
- Each library can have up to 5,000 groups and 5,000 group sets.
- Each record can contain up to 51 fields (e.g., Author, Title, etc.)
- Ships with 50 predefined reference types and 3 unused references types that can be customized to meet your needs. (Customization of reference types is only available in EndNote on the desktop.)

1.5   After the Class

1.5.1 The EndNote Quick Reference Card

The Quick Reference Card contains information on commonly used features, and can be download from http://endnote.com/training. Please contact the instructor if you would like a high-quality printable version.

1.5.2 Video Tutorials

We have videos available in several formats to help you learn the program.

- Our YouTube channel at www.youtube.com/endnotetraining has videos with closed captions. You will find links to videos specific to this class throughout this outline. Our channel also has recorded classes that can be played anytime.

- Downloadable videos at http://endnote.com/training/training-video-downloads
    - M4V files that will play in the free Quicktime Player program (http://www.apple.com/quicktime/download/) or iTunes program. These files have closed-captions in several languages, but the languages available for each vary by video. (Note: If you import these files into iTunes, they will display as various seasons of the TV show *EndNote.*)
    - MP4 files will play in Quicktime Player, iTunes, or various other video players.
    - WMV files will play in Windows Media Player.

1.5.3 Technical Support

Technical Support is free and is available Monday–Friday, 6 a.m. to 5 p.m., Pacific time. You can reach technical support through contact forms on our web site or by calling 1-800-336-4474, pressing 4 at the prompt, then selecting the *Research Software* option.

2 Creating and Adding Records to an EndNote Library

2.1 Creating a Library

We strongly suggest having just one EndNote library for your writing. Only one EndNote desktop library can be synchronized so that it's available online. If you try to synchronize more than one EndNote desktop library, EndNote will merge all of the libraries.

It is also only possible to search one library at a time, so if you have many libraries and are trying to find an older reference, you may have to open and search many of them to find it. If you have just one library, you will be able to search it almost instantly.

Remember to back up your EndNote library! This can be done by selecting **Compressed Library** from the **File** menu.

Note: Do not store your working library on a flash drive or in any online synchronization service such as Dropbox, SugarSync, SkyDrive, Google Drive, Sharepoint, or any similar service. Doing so may result in corruption of the EndNote library because flash drives and these services do not save the data in the correct sequence. Compressed libraries can be stored on flash drives or online synchronization services such as Dropbox, but the library should be moved out of these drives or shared folders before being opened and uncompressed.

EndNote online is the only safe method for synchronizing references in a working library between multiple computers.

To create your library, select **New** from the **File** menu. We suggest saving the library in your documents folder rather than in subfolders within your documents folder. _____

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2.2 The EndNote Sample Library

Although you will create your own library for references, for the purposes of the class we will use the EndNote sample library. You can also use this sample library when you want to practice using new features in EndNote without risking real data. You can find the sample library in the \Public Documents\EndNote\Examples folder on Windows or in the /Applications/EndNote Xx/Examples folder on Mac (where the small "x" stands for the EndNote version number). The sample library will be a compressed library with a .enlx extension. When opened, it will uncompress into a .enl file and a .data folder. The .enl file and the .data folder *together* make up the working library and should not be separated.

Related Video: [The Importance of the Data Folder](#)

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2.3 Online Connectivity—Importing References from Online Databases

2.3.1 Online Search—Searching an Online Database from within EndNote

Select **Online Search** mode from the buttons to the left of the style drop-down list. For EndNote X6.0 or earlier, this will be the third button, as shown here (Windows version shown here).

For EndNote X6.0.1 or later, this will be the second button, as shown here (Windows version shown here).

In the Groups panel on the left, select the online search file you want to use from the favorites list or click on **more…,** which will bring up a list of all installed online search files. Select the database you want to search from the list. (Notes: You can do a custom installation of EndNote to install more online search files or download them from our web site. Online search files are sometimes called "connection files" in EndNote.) _____

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Using the Online Search mode, references from an online search are retrieved into a temporary EndNote library so you can preview them. After searching, references you wish to keep can be copied to a permanent EndNote library using the **Copy References to** command on the **References** menu or the **Copy to Local Library** button on the EndNote toolbar.

Related Video: Online Search in Online Search Mode

2.3.2 Direct Export

The exact method for using direct export will vary with the data provider you are using. A sample of the data providers that support direct export for at least some of their databases includes: Web of Knowledge (information on Web of Knowledge training options can be found at http://science.thomsonreuters.com/training/wok/), Oxford Press Journals, American Psychological Association, BioMedCentral, BMJ, EBSCOHost, EI Engineering Village, EMBASE, Los Alamos National Laboratory, IEEE, JAMA, ERIC (U.S. Dept. of Education version), Karger Publishing, JSTOR, MicroPatent, NERAC, NISC, OVID, PROQUEST, Elsevier, Science Direct Online, Google Scholar, and TIE.

Related Videos: Direct Export from the Web of Science, Direct Export from EBSCOhost Databases, Direct Export Using Firefox, Direct Export from PubMed

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2.3.3 Importing PDFs

EndNote can import PDF files containing a Digital Object Identifier (DOI) in the metadata or the first two pages of the PDF. EndNote sends the DOI to PubMed and CrossRef, online databases capable of looking up reference data by DOI. The online databases send back the bibliographic

information, EndNote imports it, then attaches the PDF to the record created. This means the PDF must have a DOI and EndNote must have access to the Internet during the import.

- Select **Import** from the **File** menu.
- Select **File** to import a single PDF, or **Folder** to import a folder containing PDFs.
- Click the **Choose** button to select the file or folder to import.
- **PDF** must be selected as the **Import Option**.
- Click on the **Import** button to begin the import.

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2.3.4 Importing a Text File Saved from an Online Database (Optional)

All importing uses a pattern matching process where the pattern of the tags in the data is matched against the pattern of the tags in the import filter. It is very important that data be saved in the tagged format that matches the filter that will be used to import it. Below is an example of tagged text. The tags are on the left and the data follows them.

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TI  - The Scale and the Feather:  A Suggested Evolution
AU  - Rex, Tiberius
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For specific information on how to save data for the database you are using consult the table titled *Output Formats and Corresponding Import Options*. This table is available in the online help files (**Help > Contents > Contents tab > Direct Export Formats and Import Formats > Output Formats with Corresponding Import Options**).

- Select **Import** from the **File** menu.
- Select **File**.
- Click the **Choose** button to select the file to import. EndNote can import only plain text (.TXT) files and .XML files in the specific EndNote XML format. It cannot import .RTF files, Word documents, or .HTML files. So save the data from your online search as a plain text file. *Please note that simply changing the extension of a file to ".txt" or ".ris" (a common direct export format) will not make it importable.*
- Select the filter that matches the name of the database and database provider from the drop-down **Import Option** list. If you do not see the filter you need, select the **Other Filters** option to see a list of all the EndNote filters installed on your computer. You can add filters by performing a custom installation of EndNote or by downloading them from our web site and placing them in the EndNote filters folder.
- Choose how duplicates will be handled from the drop-down **Duplicates** list.
- EndNote is Unicode-compliant, but if your import produces records with "garbage" characters where accented characters or Unicode characters should be, the **Text Translation** option is the problem. You will need to delete the original import and repeat the import, but select the language encoding that matches your text file from the drop-down **Text Translation** list. If you are unsure of the encoding, try opening the downloaded text file in Word or another word-processing program and make a note of the language encoding it chooses to open the file with. Close the text file and use that language encoding when you repeat the import of the file.

Related Video: Importing Text Files

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2.4   Find Full Text and the EndNote Preferences

2.4.1 Find Full Text Preferences

To edit the preferences, on Windows select **Preferences** from the **Edit** menu, on Macintosh select **Preferences** from the **EndNote** menu to the left of the **File** menu.

In the Find Full Text preferences, mark the box for **PubMed LinkOut** if you are in medicine or the biosciences and your organization is using PubMed LinkOut.

If your school or organization has an OpenURL server, enter that server's URL in the **OpenURL Path** field. You will need to consult with your library web site or librarian to learn what this URL is because every school or organization will have a different one.

If there is an authentication page that is used with your OpenURL server, enter it in the **Authenticate with URL** field. This will allow you to authenticate from within EndNote instead of having to open a browser window for authentication.

Please note that OpenURL is _not_ a proxy server or VPN. It is an Internet protocol for managing digital subscriptions (your school may call it a "link resolver"), but in most cases you will still need to be IP-authenticated to access full text through OpenURL. This means you will need to be on-campus or connected to the campus through VPN with IP-authentication. Not all VPN includes IP-authentication, so check with your library or technical support department to find out if yours does.

2.4.2 Find Full Text

EndNote's Find Full Text feature will search the Internet, download, and attach full-text PDFs to selected references.

- Select (highlight) the references you want to find the PDF for.
- Select **Find Full Text** from the **References** menu, then **Find Full Text** again at the right.

  OR

  Click on the **Find Full Text** button [icon] in the toolbar.
- Read the copyright notice and click the **OK** button to acknowledge the usage notice.

You can optimize this feature by setting preferences specific to your school or organization in the Find Full Text section of the preferences.

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## 2.5	Finding Duplicates

- Select the **All References** group to search the entire library for duplicates.
- Click on any reference in the list of references to make the list the active window in EndNote.
- Select **Find Duplicates** from the **References** menu. By default EndNote will compare the authors, year, title, and reference type to determine if a reference is a duplicate.

You will be presented with the first set of duplicates found, with fields that have differences highlighted. You can copy and paste between the two references shown, then select the version of the reference you want to keep. EndNote will then present the next set of duplicate references.

If you simply want to delete the newest references, click the **Cancel** button to close the comparison window. All the newer references will be highlighted. Select **Clear** from the **Edit** menu to send all highlighted references to the trash.

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## 2.6	Manually Entering References (some parts optional)

Although EndNote can import from hundreds of online databases, not everything is available online. Sometimes you have to type the references in manually. Sometimes the data you import may have problems, such as an author's name not showing up correctly because that author is an organization or known by a title instead of a first and last name (for example, Sitting Bull was a title for an American chief, not a first and last name). This section of the class will help you manually enter references, correct references that had problems during the import, and show you how the special fields work.

Related Video: Manual Data Entry

Select **New Reference** from the **References** menu to create a new record._____

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### 2.6.1	Selecting the Reference Type

Select the reference type from the pull-down **Reference Type** list at the top of the empty record.

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### 2.6.2	Entering Data

Do not format the data as you enter it if the formatting would apply to the entire field. For example, do not italicize or bold author names or journal names. If formatting applies to only some words or characters in a field, then you can apply that special formatting using the formatting toolbar. You can copy-and-paste data into most fields, but be sure to remove any formatting.

You do not need to enter data in every field. Enter the data that you require for your bibliography or that you wish to track.

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2.6.3 Special Fields

Authors: Author names can be entered either first-and-middle name and then last (family) name (e.g., John Robert Smith); or they can be entered last name, then a comma, then the first-and-middle name (e.g., Smith, John Robert). Each author must be on a separate line. Add corporate authors or authors where the "name" is a title with a comma at the end of their name (e.g., *University of California,* or *Sitting Bull,* without the bold or italics). If you use a name that has been used before in the library, EndNote will try to match it for you.

Year: This is not a true date field. It is an alphanumeric sorting field. Enter four-digit years. You can also enter text such as "unpublished" or "in press."

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Journal: Enter the journal name. EndNote will try to to match what you are typing, just as it does author names. _____

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Pages: Pages can be entered as a full range of pages (e.g., 125-128) or as a truncated range (e.g., 125-8). EndNote is able to convert the format entered to the format required in the style._____

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Start Page: This field is used in the Harvard Bluebook style. If you are not in legal studies, you probably do not need to enter it. _____

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Date: This is not a true date field. It is a text field and will be shown in your bibliography exactly as entered. Do not include the year here, it would be duplicated because the year will be pulled from the year field.

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Short Title: If a full-reference footnote style calls for a shortened version of the title in repeated citations, that information will be pulled from the short title field. This field is generally used only in the humanities. _____

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Alternate Journal: This field is used for the abbreviation of the journal name if you are using the journals term list for journal name substitution.
Related Video: [Journal Names](#)

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Keywords: Enter keywords with a line break, a semicolon (;), or a backslash (\) between each keyword. Do not use a comma (,) or a slash (/) to separate keywords because these are used within keyword phrases by online databases, so EndNote ignores them as keyword separators. _____

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URL: You can copy and paste a URL into this field or type it in manually.

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File Attachments: You can attach files or insert links to files on your network or hard drive by selecting **File Attachments**, then **Attach File**, from the **References** menu. The default in EndNote is to attach the file to the record so that it travels with your library. You can change this default on a case-by-case basis during file selection by unmarking the option at the bottom left of the file selection window called *Copy this file to the default file attachment folder and create a relative link*. You can also change the default option in the preferences.

Note that only attached files can be transferred to EndNote Basic, and only attached PDF files can be searched.

You can also attach files by dragging them onto a record in the reference list, or by dragging them into an open record.

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Figure (Optional): This is another way of attaching a file and is normally only used in one of the three references types devoted to tracking information about your graphics. The three types are 1) Chart or Table, 2) Equation, and 3) Figure. To insert a file, select **References > Figure > Attach Figure,** then click on the **Choose File** button. Locate the file you want to attach in the Figure field and double-click on it. If the file inserted is a picture you will see a thumbnail image of the picture; if it is an object you will see an icon for the object's file type. There can be only one file linked to this field per record._____

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Caption (Opt.): This field is tied to the Figure field. When the image is inserted into a Word document, the contents of the caption field will be used as the caption for the image in Word. If the reference type Chart or Table was used, the graphic will be inserted in Word as a table; if any other reference type was used, it will be inserted as a figure. _____

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2.7 Groups (Shown in practice in earlier parts of the class, but here is a summary)

- Groups are organized under group sets, and references are organized in groups.
- You can have up to 5000 groups per library.
- You can have 5000 group sets per library. Group sets will appear in bold on Windows and in uppercase letters on Macintosh.
- The same reference can be in multiple groups.
- Combination groups are a special type of smart group based on a search strategy combining the contents of other custom or smart groups. Select **Groups > Create from Groups** to create a combination group.
  - o 📁 Custom groups have a folder icon. You manually add records to a custom group. To create a custom group, select *Create Group* from the *Groups* menu.
  - o 🔍 Smart groups have a light bulb icon on Windows and a light icon on Macintosh, and records are updated automatically by matching the group's search criteria. To create a smart group, select *Create Smart Group* from the *Groups* menu.
  - o 🎨 Combination groups have an overlapping circles icon and are created by combining other groups. To create a combination group, select *Create from Groups* from the *Groups* menu.

Related Video: EndNote Groups

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3   Journal Names

Some journals require the journal's name be spelled out in full while others require a standardized abbreviation, or vice versa. Some disciplines may even have multiple versions of the standardized abbreviation, such as one with periods after abbreviated words and one without periods. EndNote can substitute one version of a journal's name for another in the formatted bibliography without having to edit each record.

There are two steps to make this work, and they only have to be done once per library.

The first step is to set up a journals term list for your EndNote library.

Related Video: Journal Names

3.1   The Journals Term List

In EndNote, select *Open Term Lists*>*Journals Term List* from the *Tools* menu. Resize the window so that you can see all the abbreviation columns as in the example below.
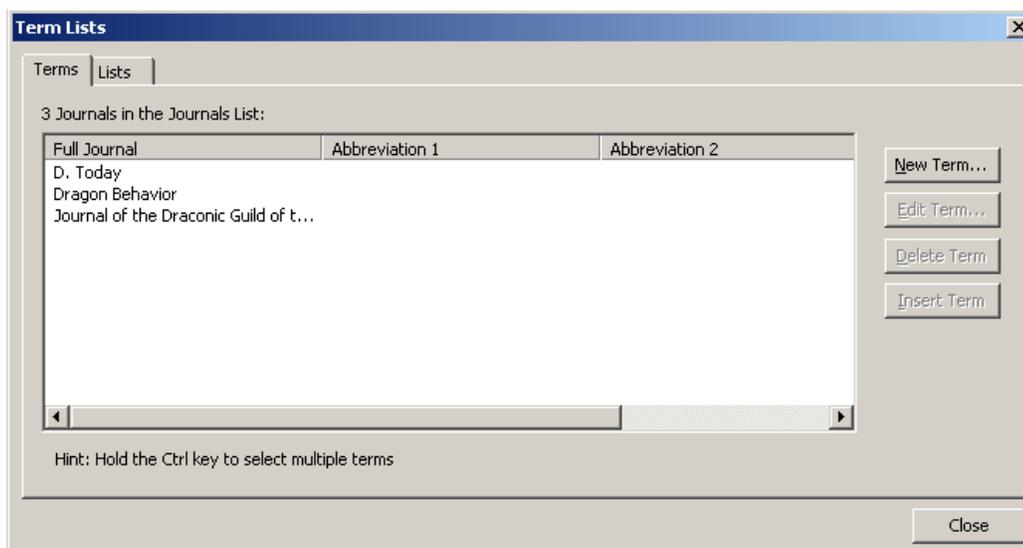
As references are entered into EndNote the contents of the Journal field are added to the Full Journal column in the term list while the contents of the Alternate Journal field are added to the Abbreviation 1 column. If there is only one version of the standardized abbreviation and the full journal, everything you need in this table will be filled in so long as each record entered in the EndNote library contains the full journal name in the Journal field and the standardized abbreviation in the Alternate Journal field. In reality, this is seldom the case. However, it is possible to manually enter the information in the term list, or better yet to import a list of the full names and abbreviation(s) from a tab-delimited file if you have one.

EndNote ships with several predefined tab-delimited files containing full names and standardized abbreviations, including those for the humanities, chemistry, law, the biosciences, and medicine. These lists can be imported into EndNote to create a comprehensive list of journals. To do this—

- Open the Journals term list.

- If there are journals already present, delete them by selecting all the journals present, then selecting the ***Delete Term*** button. This will ensure that you have no "orphan" journals without complete information or with abbreviations in the Full Journal column.

- Select the ***Lists*** tab.

- Select ***Import List***.

- Locate and double-click on the tab-delimited file you wish to import. The predefined lists that ship with EndNote will be found in the Terms Lists folder within the EndNote folder. The complete list will be imported.

- Make note of the column for the abbreviation or full name that your new style requires.

Close the Term Lists dialog. You can now set the style to use the correct version of the journal name from the journals term list you created.

3.2   Journal Names in the Style
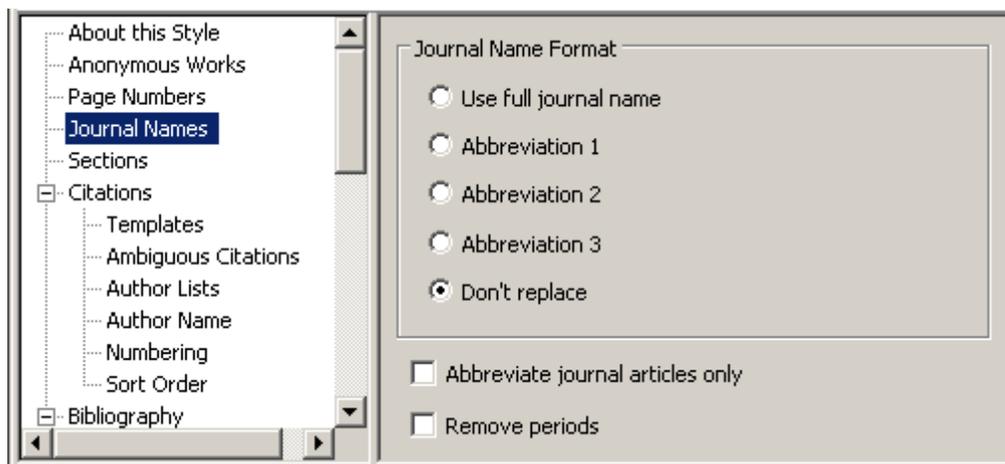
In the default journal name settings the style may be set to *Don't replace*. Change that to the option needed for your style. (Some styles may already be set up to use the list, so just setting up the terms list may be all you need to do.)

Save the style with a new name by selecting ***Save as*** from the ***File*** menu. Your new style will be saved in your *My Documents\EndNote\Styles* folder.

4   Cite While You Write in Microsoft Word

4.1   Installing the Cite While You Write Tools for Word on Windows

When you install EndNote it will automatically install files into a common program folder, allowing EndNote and Word to communicate and enabling Cite While You Write (CWYW) in EndNote.

In Word 2007, 2010, or 2013 you will see a tab on the ribbon, similar to that shown here.

4.2   Installing the Cite While You Write Files on Macintosh

After you install EndNote (by dragging the EndNote folder to Applications), start the EndNote application. This will start the Customizer, which automatically installs Cite While You Write files for Microsoft Word (2011 or 2008). Upon starting Word, you should then see an EndNote menu under Word's Tools menu; you may also see an EndNote toolbar in Word. If you do not see the tools, select **Toolbars>EndNote** from the **View** menu in Word to make it visible.

The Microsoft Office 2011 installation must include Visual Basic.

The EndNote toolbar will appear in Word, as shown here.

4.3   Using the Cite While You Write Tools in Word

In the sections below the Windows button or drop-downs show first and the Mac button or drop-downs show second.

4.3.1 *Go to EndNote*

This command will take you to the EndNote program, where you can select (highlight) references for insertion into your Word document.

Related Video: CWYW: Adding Citations to a Word Document

4.3.2 *Insert Citation(s)*

This command will provide a search window where you can enter text that is in any field of the EndNote record you want to find. You can then select references from a list of those that contain your search terms and insert them into your paper. (Note: For Windows, click on the magnifying glass icon in the top part of the button to activate it.)

Related Video: CWYW: Adding Citations to a Word Document
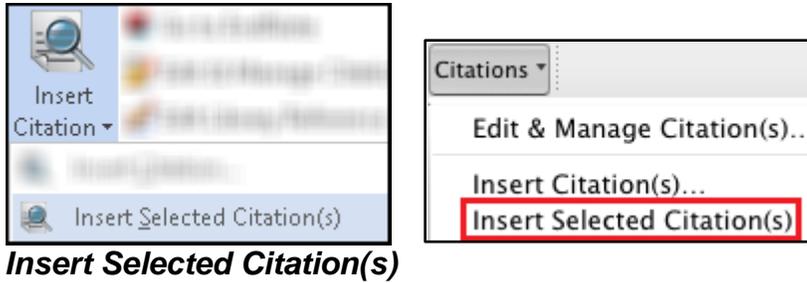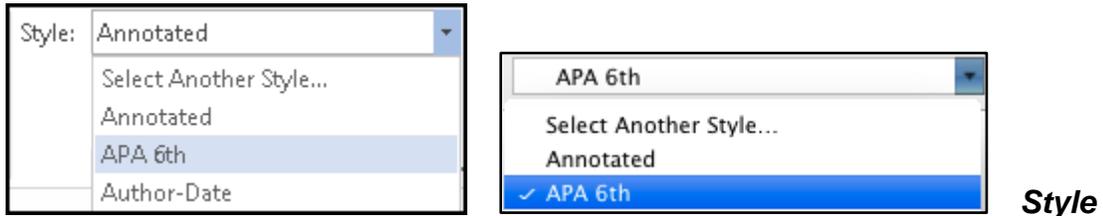

4.3.3 **Insert Selected Citation(s)**

This command will insert the references that are selected (highlighted) in EndNote into your document at the location of the Word cursor. (Note: For Windows, click on the bottom part of the Insert Citation button to activate the list of commands available.)
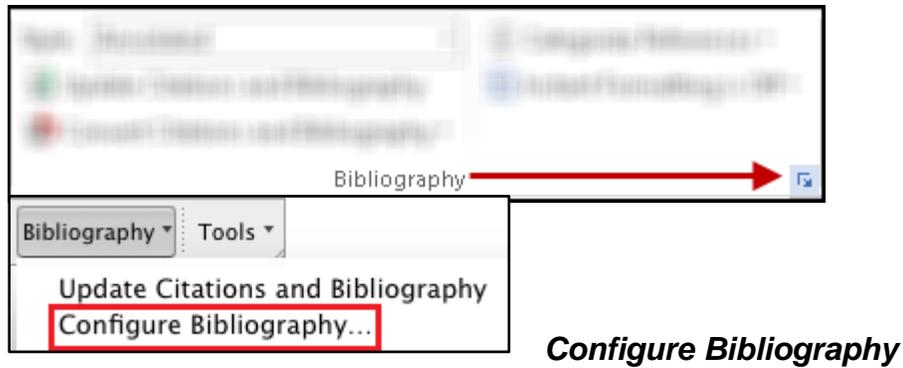
Related Video: CWYW: Adding Citations to a Word Document

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4.3.4 **Style**

If you simply want to change the style, without changing any of the other options (such as font or line spacing), the Style drop-down list will allow you to do so._____
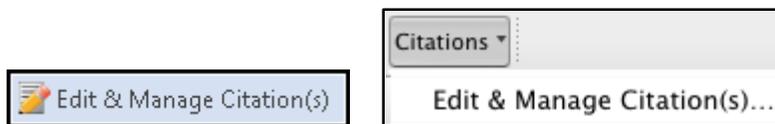
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4.3.5

Configure Bibliography

This command will allow you to change the EndNote style used for your document. It will also let you make other changes to the layout of your bibliography, such as adding titles and changing the line spacing.

Related Video: CWYW: Formatting the Bibliography

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4.3.6

Edit & Manage Citation(s)

Use this command to make any changes inside a citation, such as adding page numbers or removing author names from author-date citations.

Related Video: CWYW: Edit & Manage Citations

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EndNote Desktop.docx
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