ENDNOTE X7 Quick Guide Contents

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Creating an EndNote Library

- Select **File - New**
- Type in the name of the library. The library can be save anywhere on your computer, but you may want to save your EndNote Libraries to one Folder for easy retrieval
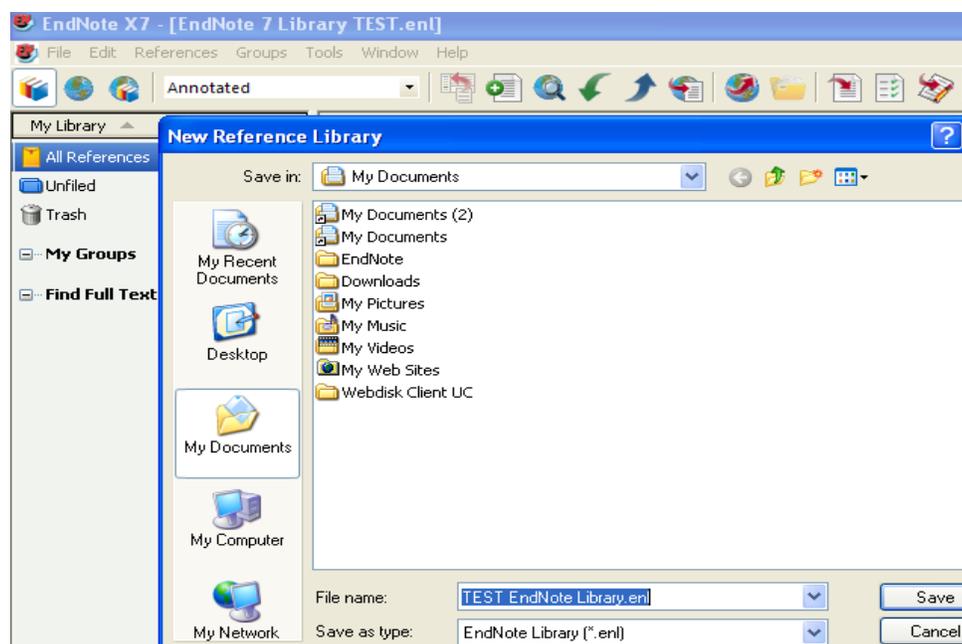
Endnote Libraries

In Endnote, a Library is a folder with a collection of references. To open a Library:

- File > Open > Hover cursor over the Library you want > left click on Library name
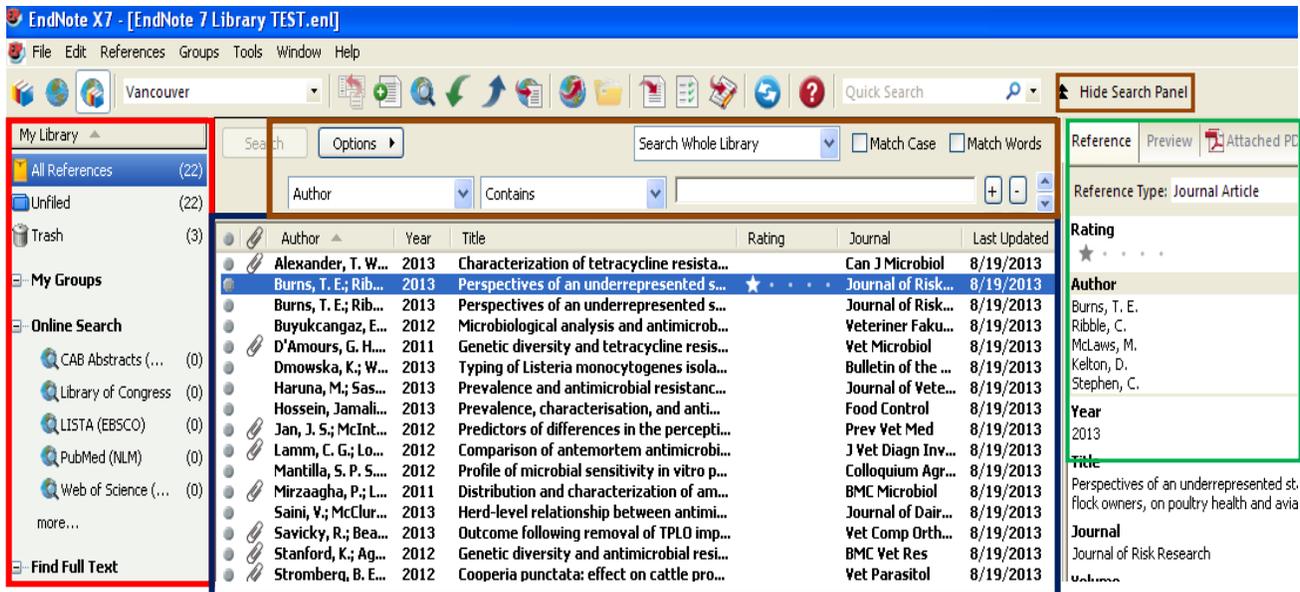
- Groups Panel (left frame) – Used to create subgroups (sub-folders) within a Library. This frame also contains links to online searching, and the Find Full-Text status link

- Centre frame – Lists all of the references in the selected Library. Double-clicking on any record in the centre frame will display the complete reference. Click on the black close X top right of the individual record frame to close the complete reference display

- Reference Panel (right frame) – Reference tab displays the citation only. Preview tab displays the citation and abstract of the individual record in the selected in the centre frame. Click on the PDF to display the full-text PDF attached to the record

- Search Panel (top centre) – Used to search references within your Libraries. Click on Hide Search Panel to hide this panel from view

Customizing the Display

- **Edit - Preferences - Display Fields** allows you to change the fields displayed in the top menu bar of the index fields list.
- **Edit – Preferences – Libraries** allows you to choose which Library you want to automatically open when starting EndNote
- References can be sorted by clicking on the desired field label in the centre panel eg. Title, Author, Journal
- The Groups Panel or Reference Panel can be hidden from view by selecting Off by clicking on the Layout icon, bottom right of the screen (see below)
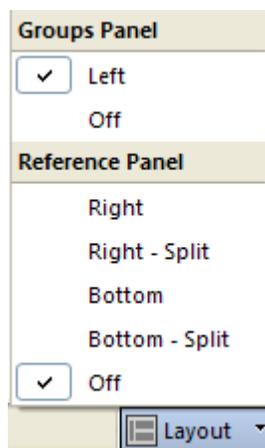
Adding References to Your Library: Manually Entering References

- You only want to do this if you are not able to export the record directly from a database or import a text file from a database

- Choose **References – New Reference**
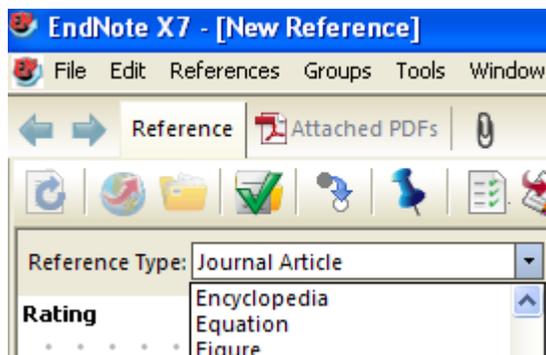
- Select the **Reference Type** from the drop-down menu box at the top left of the screen. It is very important that you select the right reference type so that the appropriate fields are available.

- Fill the information you have into the appropriate field. If you accidentally start inputting information into the wrong Reference Type, select the correct reference type and the information will move to the appropriate fields in the new reference type.

- Close the New Reference dialog box to save the record. It will be added to your Library.

Important Formatting Tips for Manual References

- **Names –** enter one name per line (last name, first name). EndNote will automatically complete names that have previously been entered into a library. If all authors are not known, use et.al. or and others as the last name followed by a comma. For corporate authors, use quotation marks around the corporate name ("Alberta Aboriginal Affairs").
- **Year –** must be edited with 4 digits

- **Title –** do not add a period at the end of the title. Capitalize as it should appear in the bibliography.
- **Journal –** enter the full journal title
- **Pages –** omit commas for pages in the thousands
- **Edition –** just enter the number "1" etc.
- **Keywords –** separate keywords with a ; or a \
- **Inserting Symbols & Diacritics –** Click Start – Programs – Accessories – System Tools – Character Map. Choose Times New Roman for French and German and Symbol for Greek. Click on a character from the map, then choose Select – Copy. Go to your EndNote reference and paste in the character.

NOTE: Be very careful when manually entering references – any mistakes made here will be transferred to the bibliographies you develop!

Adding References to Your Library: Exporting Directly from Online Databases

Most library databases have an Export feature that transfers records directly from the database to EndNote

For all databases below:
- Open **Internet Explorer or Firefox** (best browsers to use with EndNote)
- Connect to the UC Library website: library.ucalgary.ca
- Choose **Search Collections** > Databases by Subject from the top blue banner
- In the search box, type the name of the database

Direct Export: OVID Databases

- Type **CAB Abstracts** in the search box, then click on the CAB Abstracts link
- In CAB Abstracts, click on the Find Citation tab
- In the Author box type: **ribble c**

Basic Search | Advanced Search | Find Citation

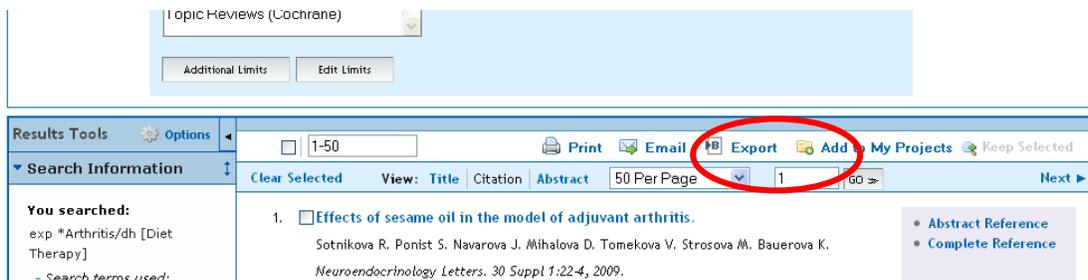1 Resource selected | Hide | Change
CAB Abstracts 1910 to 2013 Week 32

Article Title

Journal Name

Author Surname ribble c

In search results, select several records by clicking in the box on the left of each title
Click on **Export** in the box as shown below

In the pop-up box below, choose Export to **EndNote** , and **Complete Reference.** Click on **Export Citations**

Direct Export: PubMed

- Type: antimicrobial resistance feedlot cattle
- Check the box to the left of the first 8 results
- Click on **Send to: Choose Destination > Citation Manager**
- Click **Create File**
- In the Opening Citations pop-up box, select **Open with EndNote x7.** Click **OK**

Direct Export: Google Scholar

In search results, click on the Cite link below the reference you want to import

- In the Cite box below, click on the **Import into EndNote** link

In the Opening Scholar pop-up box, select Open with EndNote x7. Click on OK.

Importing Records from PDF Files

When you import PDF files EndNote automatically generates EndNote records for each PDF

To Import an Individual PDF file:

- Open the library into which you want to import the references
- From the menu **File > Import File**
- For **Import Option >** select **PDF**
- Select an option from the **Duplicates** list
- Click **Choose** > select file you want to import > click **Open**
- Click **Import**
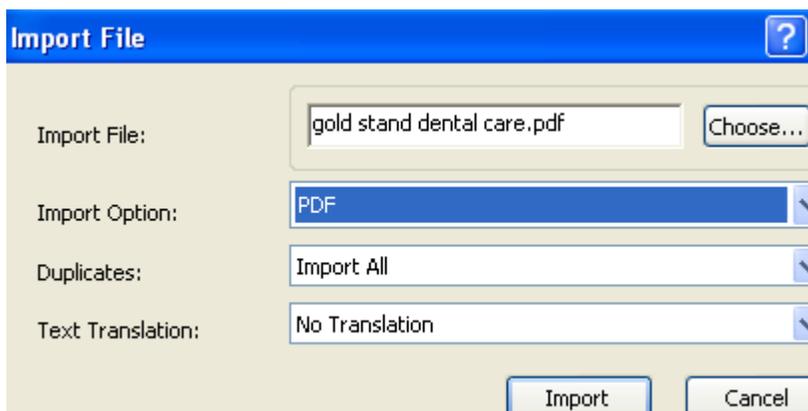
To Import a Folder of PDF Files:

- Open the library into which you want to import the PDFs
- From the menu **File > Import File**
- For **Import Option > PDF**
- Select an option from the **Duplicates** list
- Click the **Choose** button to open the **Browse for Folder** dialog box
- Select the folder and click **OK**
- Click **Import**

Searching PubMed or Library Catalogues via EndNote

- When searching for articles on a topic, it is *strongly recommended* to search in databases directly, and then export records from the database to EndNote. This utilizes the full search functionality of databases, which is vastly superior to the EndNote internal search function. The EndNote search is best used only to locate a known reference.

- From menu **Tools > Online Search**

- On the Choose a Connection box below, choose the database or catalogue to search. Click on **Choose**
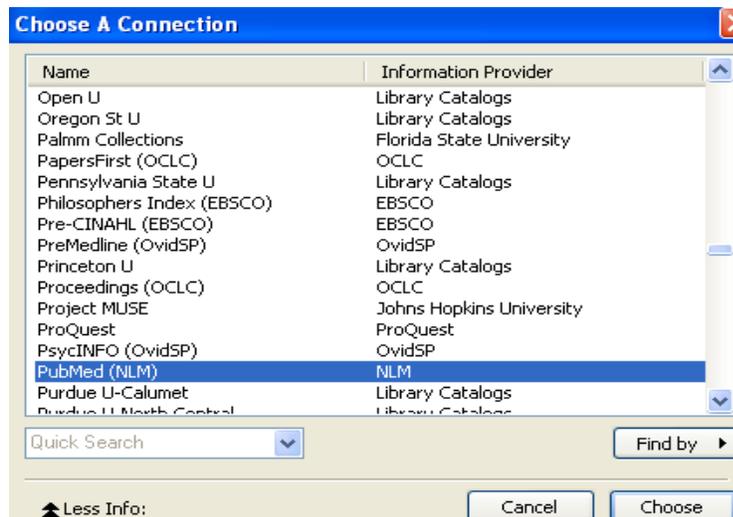

- Type your search terms and select the appropriate field for each term, then click on **Search**
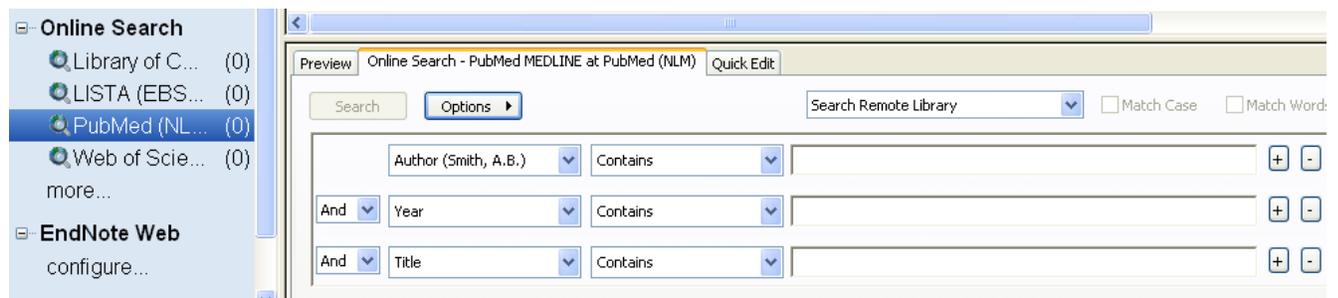
- Copy the records to the desired library

- Once you have searched a database it will display in the **Groups** frame under **Online Search** and you may choose it from there.

.Find Full Text PDFs for References

The Find Full Text function automatically locates and attaches full text PDFs for references in your Endnote library. To use this feature, go to **Edit > Preferences > Find Full Text**
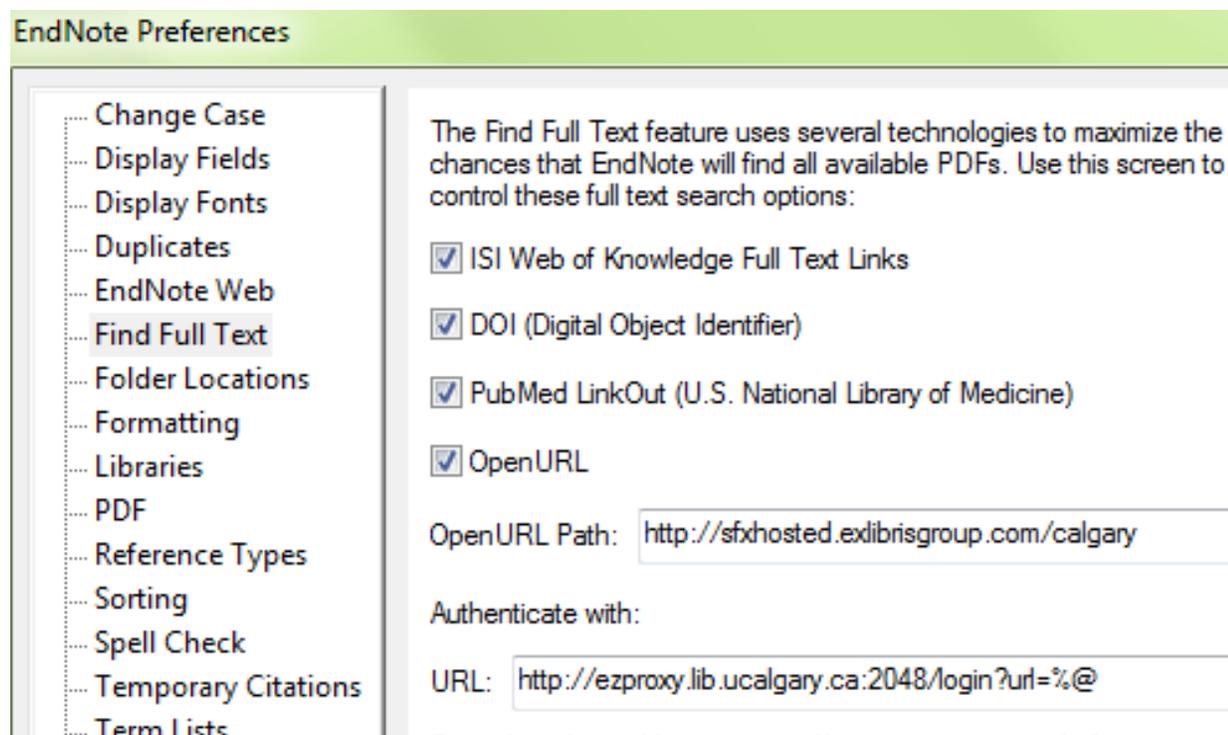
These preference settings are posted on the Health Sciences Library website:
http://people.ucalgary.ca/~medlibr/endnoteucfulltextsettingsjan2813.pdf

Find Full Text uses the DOI (Digital Object Identifier) number usually found on the first page of journal articles. If a journal does not use DOI numbers in the full text of the article, Find Full Text cannot retrieve the PDF, so you will need to manually attach the PDF to the record

To use Find Full Text:

- Select the references in a Library for which you want to add full text (Use **Edit – Select All** to select an entire group of references)
- From the **References** menu, choose **Find Full Text > Find Full Text**
- On the Database Menu screen below, click Continue

Database menu

Books24x7.com
Archivision Catalogue
SDA (University of Toronto CHASS)

Click OK on the copyright pop-up box below
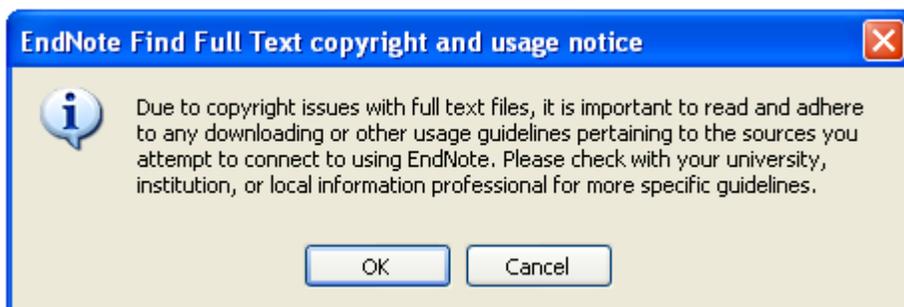
- EndNote will give you a real time indication in the left Groups Panel as it finds PDFs (or doesn't)
- When a full text PDF is attached to a record an icon appears to the left of the record in the centre panel
- If EndNote cannot find a full text file it will often be able to attach the URL of the provider's web page for the article

Copying References Between Libraries

- Select the references you want to copy. Choose **Edit – Copy**.
- Open the library you want to add the references to – **Edit - Paste**.
You can also use **Import** to import one library into another

Saving your Library

- Click on **File – Save a Copy**. When the dialog box opens, save to your desired drive.
  OR
- Or use **Windows Explorer** to copy and paste EndNote files to another location. **Be sure to save both the .enl file and the .DATA folder as both are necessary to open the library.**

OR
- Save a compressed Library (both the .enl file and .DATA folder in the same file) by choosing **File > Compressed Library (.enlx).** When the Send to Compressed Library dialog box comes up, **select the drive** you wish to save to. The file name suffix will be changed to **.enlx**. There is also an option to **email the file** directly with or without attachments. If you are sending a Library to non-U of C persons, you should choose without attachments (due to copyright and licensing restrictions on sharing with non-U of C persons)

Note: If you save to a USB key you may open the Library and work directly from the key

Cite While You Write

EndNote Cite While You Write works with Word to cite references in your paper and create the bibliography

When you install EndNote choose to install the link into MS Word. This will install an EndNote toolbar (see below)in your Word program. Use this toolbar to insert your references into your paper.
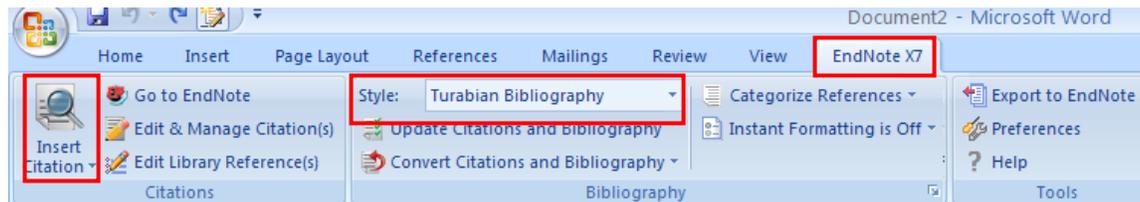
- Ensure EndNote is open and running in the background
- In Word, to insert a reference click on the **Insert Citation** icon
- Type the author's name or other identifying information into the search box and click on Search. Select the correct citation and click on **Insert** on the bottom of the Find & Insert my References pop-up box
- When inserting more than one reference in the same in-text citation, select the desired references in EndNote, then click on the **Insert Citation > Insert Selected Citations** icon on the toolbar in Word. Be sure to go back and deselect the selected citations so they don't appear next time you use this function.
- The citations will appear in the text of the document and will also be added to the bibliography at the end of the paper.
- To change the format of your bibliography, choose the desired format from the **Style** drop-down menu box. It may take a few seconds to re-format.

Producing an Independent Bibliography

You may want to print or email a list of references separately. There are several ways to do this:

Copy Formatted

- **Edit – Output Style** – select your preferred style
- Open your EndNote library and select desired references in the Library window.
- From the **Edit** menu choose **Copy Formatted**
- Open a document in Word, put the cursor where you want the references to appear and **Paste**.

Print Directly from EndNote

- Select references.
- Choose your desired **Output style** and click **Edit**.
- Choose **File > Print**. To print all references in the Library, change the print range option to **All**.
- Click on Print.

Output Styles

If the output style you want is not listed in the EndNote menu box (top left), click on Select Another Style, and select a style from the Choose A Style menu, then click on Choose. It will be added to the menu box.
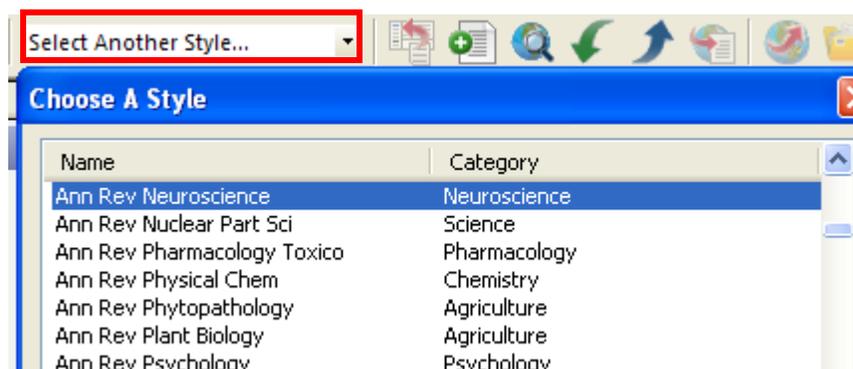

If the style you want is not on this list, go to the EndNote website at: http://endnote.com/downloads/styles
- Search for the style or journal name you want, then click Download. Select Open with EndNote x7 > OK
- Double-click the style file. It should open in EndNote.
- In EndNote, go to "File Menu" and choose "Save As". Replace the word "copy" with your style's name and click "Save"
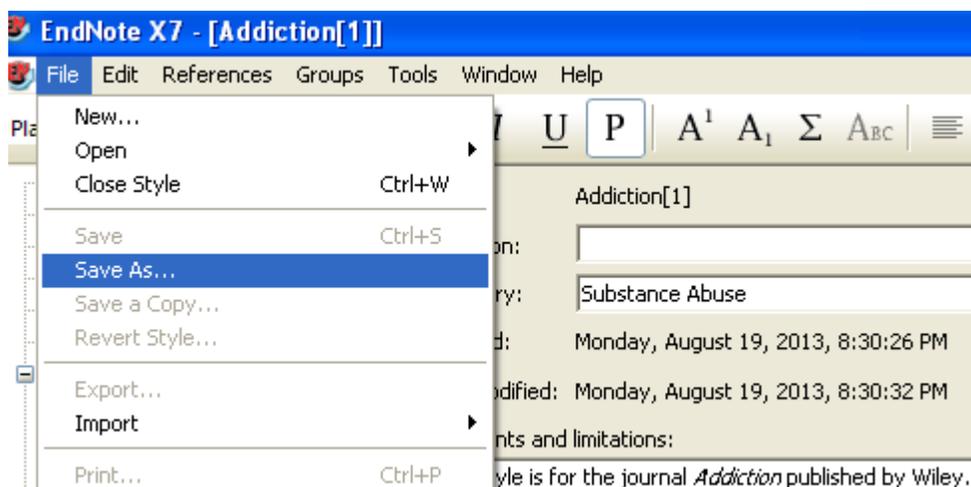
- Click on "File Menu" and choose "Close Style".
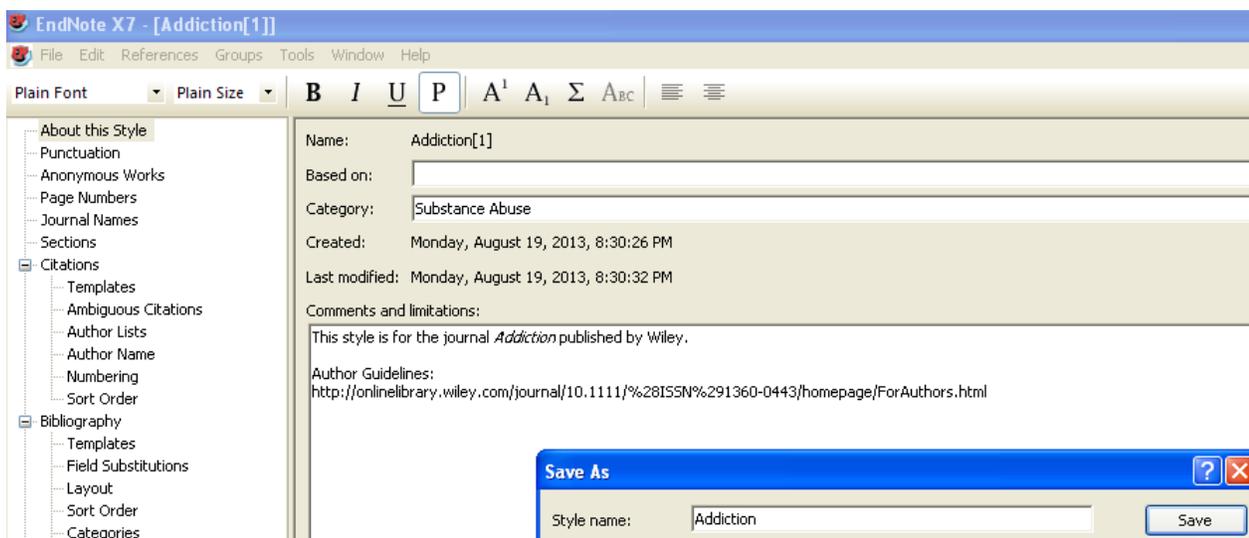
- In Endnote, Select Another Style > the connection file you downloaded should now be in the Choose A Style list

Transferring records from Reference Manager or Refworks to Endnote

- Open the Reference Manager / Refworks database you want to convert
- Choose **File – Export**
- Select **the RIS format** (Reference Manager) or **Bibliographic Software** (Refworks) - Make sure all references have been selected.
- **Export** to a text file
- Open the EndNote Library you wish to import the records into
- Choose **File – Import**
- Select the file you wish to import (the text file you exported from Reference Manager or Refworks)
- For the **Import Option** choose the **RIS** (Reference Manager) format
- Click on Import

Help | More Information

- EndNote vendor website
  http://www.endnote.com
  Free demo version, FAQs, updated filters and output styles, customer technical support

- University of Calgary Health Sciences Library Citation Management Tools
  http://libguides.ucalgary.ca/hsl/citationmanagementtools