Merle Rosenzweig
oriley@umich.edu
Erin Kerby
ekerby@umich.edu

EndNote

for Academic Research and Publishing for the Health Sciences
What This Class Will Cover

1. **Overview**
2. **Introduction To EndNote**
3. **Getting References Into An EndNote Library**
   ➤**Manually**
   ➤**Connection File**
   ➤**Importing from PubMed**
   ➤**Direct Export**
4. **Finding Full Text**
5. **Using EndNote 0With Word**

Overview

The goal of this class is to help you work with the software program EndNote. What is covered works with all current versions of the program. We will:

- Create a personal database, called a library, of references of various types.
- Search a variety of databases to find references of interest.
- Learn how to save the references of interest and add them to your library.
- Create Custom Groups to organize references into subsets.
- Format a word document utilizing the EndNote Add-In.

Introduction

What is EndNote and what does it do?

➢ EndNote is a computer software program classified as "bibliographic management".

➢ EndNote allows you to collect and organize various types of references into a personal database called a library.

➢ EndNote allows searching online bibliographic databases and retrieval of references directly into your library.

➢ EndNote works with your word processor to format documents and create bibliographies with the Add-in feature that is installed into your word processor program when you install the EndNote software.

Some tips:

➢ EndNote libraries are **cross-platform compatible**. That is, they can be used by computers running Windows or Mac operating systems.

➢ It is recommended that you keep all of your references together in one main library.

➢ You should save a backup file of your library and update it when you add to your original.

Why should I choose EndNote over other bibliographic management options?

➢ EndNote is easy to use and one can quickly master its use.

➢ The company that creates it, Thomson Reuters, is quick to add enhancements to the software.

Having a personal copy of the software on your computer makes it easy to use without restrictions to access that may apply to such options as RefWorks.

How can I get assistance with EndNote?

➢ Endnote Website.

1. . www.endnote.com

2. *Support & Services*

3. You will see many options to help you with the program.

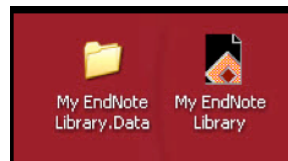4. Help on the EndNote Toolbar.

Creating or opening an EndNote Library

When you activate the application for the first time:
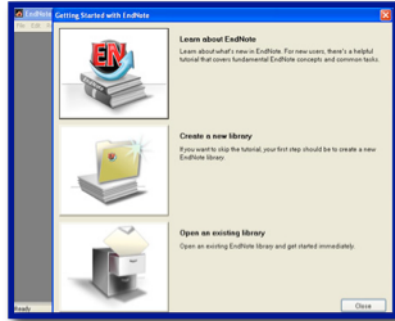
●A window will open.

●If you do not have an Endnote Library, select *Create a new EndNote library* by selecting that button.
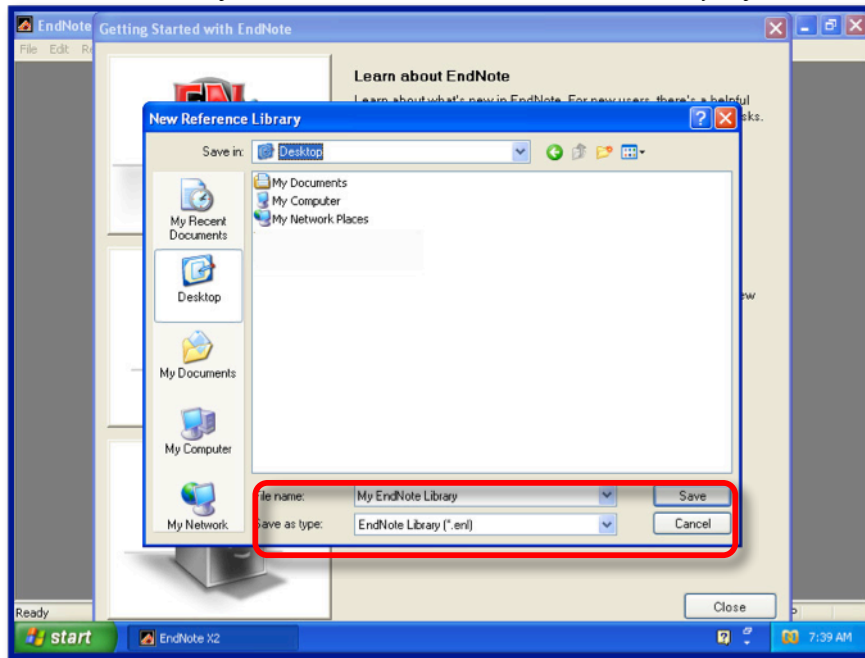
●When you create an Endnote Library there will be two files
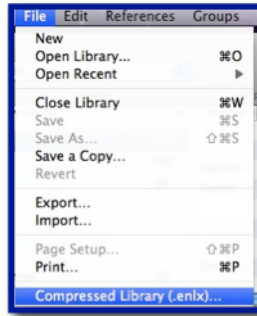1. The Endnote Library
2. The Data Folder

●Both of these files need to reside in the same location on your computer. If your library is on your desktop, the data folder must be on your desktop. If you put your library on a portable medium (a zip drive, CD, USB flash drive, etc.) the data folder must also be put on the medium.
3. With Mac version X4 & later you have the option to have these files compressed as one file.
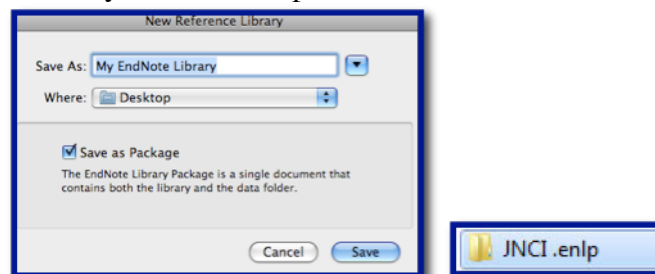
4. To email your library or upload to a cTools, Dropbox or a server you should compress it using the option under the File drop-down menu.

Structure of an EndNote Library.
- EndNote libraries contain basic bibliographic information about each reference:
    1. Author(s) names (for a journal article, author names for a chapter of a book, author or editor of a book, etc.).
    2. Year of publication (place of publication and name of publisher for books).
    3. Title (article title for a journal reference, title of a chapter, title of a book, etc.).
    4. Journal name for a journal article.
    5. Volume number (for a journal article or a multi-volume book, e.g. *Handbook of Physiology, Volume 1*).
    6. Issue number for a journal article.
    7. Page numbers (for a journal article, book chapter, etc).
- Each part of the bibliographic information is called a field and each field is named/tagged according to the information it contains.
- EndNote offers you a variety of types of references that can be entered into your library.
- To see the various types, with your library open, **New Reference** from the **References** drop-down menu or click on the **New Reference** icon.
- The fields in a reference window may change depending on the reference type.

Getting References Into An EndNote Library

There are several ways of entering references into an EndNote Library.
1. Entering references manually.
2. Using the connection file option.
3. A direct export command offered by several online databases.
4. Importing selected references from a PubMed search.

Entering references manually.

- **Accuracy is important**.
- The minimum information that you will need to enter to use the reference in a bibliography in a Word document:
  - ➢All authors (editors/authors for a book, authors of a book chapter, etc.).
  - ➢Title (journal article, chapter, book, etc.)
  - ➢Journal name (*Hesperia*) or title of chapter in a book (*The Architecture and Architects of the Classical Parthenon*) or title of the book (*Worshipping Aphrodite: Art and Cult in Classical Athens*), etc.
  - ➢For a journal article: volume number, issue number (if available) and year of publication.
  - ➢For a book: place of publication, publisher, year of publication (*Ann Arbor : University of Michigan Press, c2004*).
- Author and editor names must be entered *one name per line*.
- Author names can be entered either with the last name followed by a comma and the first name, (Huntington, George) or last name with one or two initials using a period of space between initials (Foreman, B.J or Foreman, B J).
- EndNote can abbreviate first and middle names, so for maximum flexibility enter whole names whenever possible.
- New names, author or journal, not already in your library appear in red.
- All of the names, author or journal names, are collected in the Data Folder for the library.
- When a name is already in your library, you will be prompted and it will be entered automatically.
- Closing the window will save the reference.
- Enter all author names for a particular reference. EndNote will truncate the list of authors with "et al." or "and others" as required by the bibliographic style.
- When entering corporate authors, put a comma after the name. Be sure that you do not have any commas in the name because all text before the comma is interpreted as a last name (**U.S. Department of Agriculture,**).
- ***Remember***, you will need to enter the basic information for each individual reference that is required for in-text citations in a document and for creating a bibliography at the end of the document.
- From the References drop-down menu select New Reference.

EXAMPLE OF INFORMATION ENTERED MANUALLY:

Author field enter **Huntington, G. or Huntington, George** Year field enter **1872**

Title field enter **On Chorea** Journal field enter **Medical and Surgical Reporter: A Weekly Journal**

Volume field enter **26** Issue field enter **15** Pages field enter **317-321**

- Closing the reference will save it to your library.

Entering A Hyperlink To A Reference

- Open the reference in your EndNote library to which you wish to add the hyperlink.
- Scroll down until you see the URL field.
- Type or past the URL into the field.

Example: **URL**

http://omim.org/entry/143100

- To open the **URL** click on the icon on the toolbar.

Storing Files in the File Attachments Field

- Use the **File Attachments** field to store the path to PDF files (and other file types) on your computer.
- You may have up to 50 files in the **File Attachments** field of a reference.
- Use the **Figure** field to attach a graphic or file that you want to insert into a Word document.
- The steps to add files to the **File Attachments** field:
  1. Activate the **References** drop-down menu.
  2. Select **File Attachments** and **Attach File…**.
 3. Find the file on your computer, highlight it, and click **Open**.
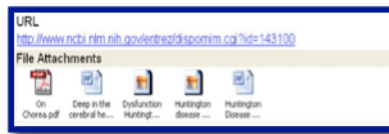
Using EndNote With Connection Files

- *Connection files contain all the information necessary for EndNote to open, search, and import references from a remote database into an EndNote library.*
- Using these files makes it possible to search library catalogs and remote databases directly from within EndNote. Library catalogs are usually available free for searching but most remote databases require a fee (password and account information are necessary). The exception is Medline via the National Library of Medicine's PubMed.
- In the left-hand pane contains a range of **Online Search** options that used to be **Connect**.
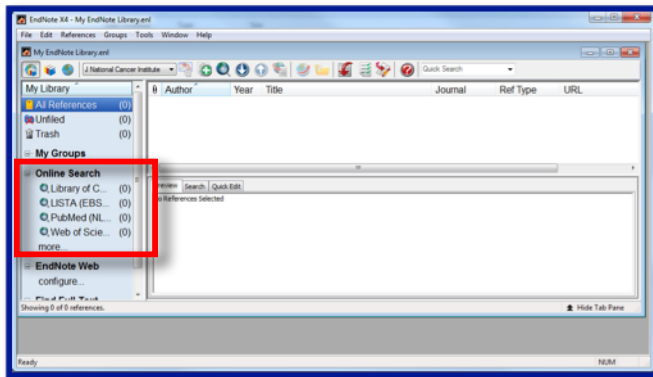
➢**Selecting U-Michigan-Ann Arbor Online Search**

1. Click on **more…**
2. Scroll through the list.
3. Click on **U-Michigan-Ann Arbor** and click **Choose**.
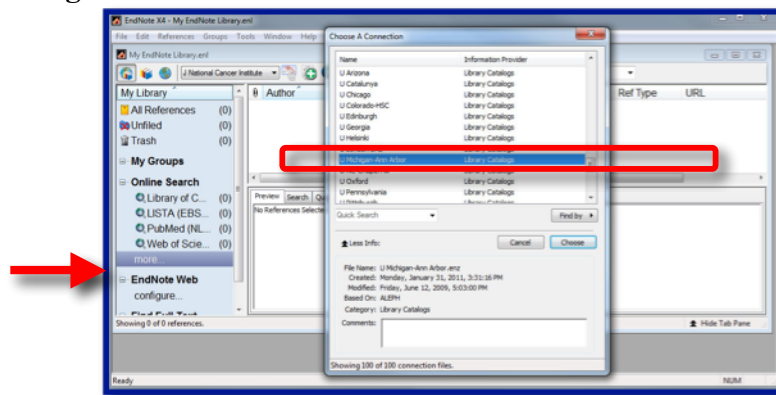
4. Connect and perform a search. Search *Title*>*limited life expectancy*.
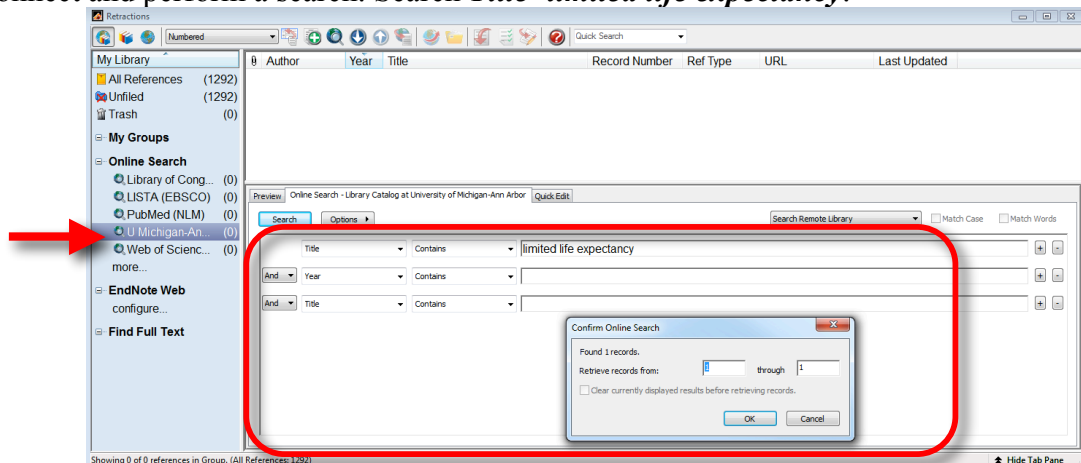
5. Create a group for the records.

Importing from PubMed Using An EndNote Filter

What is a filter?

A record found in an electronic bibliographic database is divided into fields. Each field contains a different detail about that record. Fields (and their names) vary between databases, but the most important ones are: author, title, source (all of which make up the citation you will need to find the information), abstract and subject headings.

A filter is a file that tells EndNote how to recognize these fields and their tags that are specific to the individual database and to import references you have selected from your search into your library. The EndNote program comes with many filters for various online databases and others can be downloaded from the EndNote website (www.endnote.com).

When you search a remote database directly and save the information to be "imported" into your EndNote library you need to be aware of:

- The database name (**Medline**).
- The information provider (**National Library of Medicine**).
- The format **Medline**(tagged) to save the information in.

Setting Up Favorites With The Import Filter Manager

If you are going to frequently search the Medline database directly via PubMed, you can set up quick access to the filter in the **Filter Manager**.
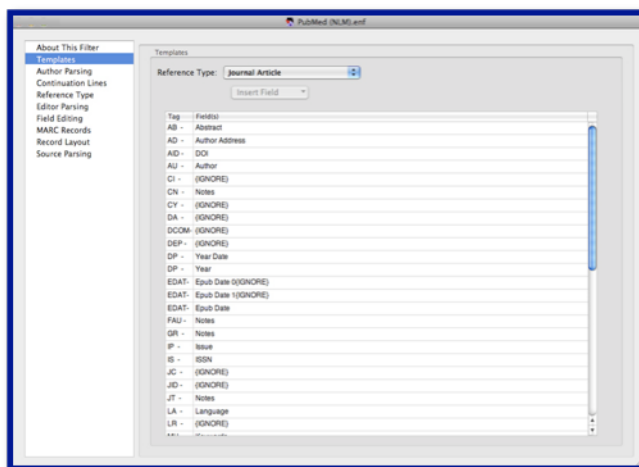
What the PubMed filter looks like.

Steps for entering records from a PubMed search into an EndNote library

1. Perform your search in PubMed. Search: ***huntington* disease early onset***. Filter: ***humans & english***.
2. Select the records that you wish to import into EndNote.
3. From the Sent to: drop-down menu select File.

4. Select MEDLINE Format.
5. Click Create.
6. Save the file to your desktop.
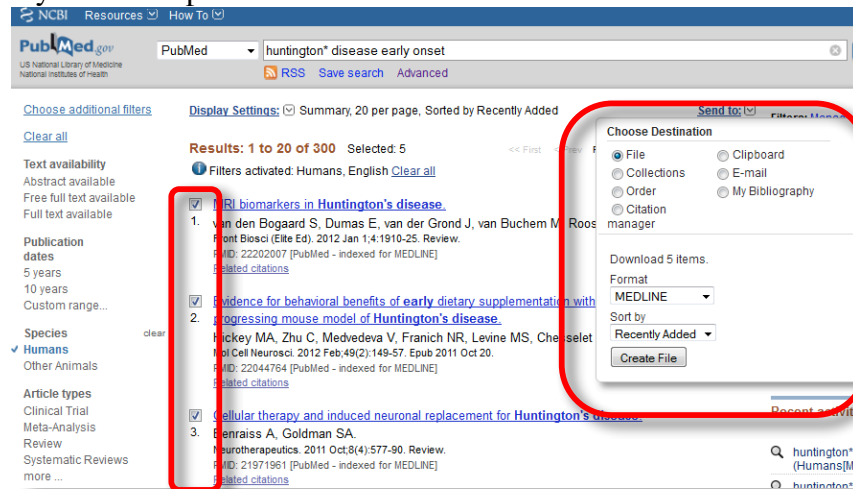
Importing saved files from a PubMed search into Endnote

1. With your EndNote library open, activate the **File** drop-down menu and select *Import*.
2. In the Import pop-up window choose the txt file just saved.
3. Choose PubMed (NLM) as **Import Option**.
4. You may either import all or discard the duplicates.
5. In the **Text Translation** box, leave it to **No Translation**.
6. Click the **Import** button and your references will be imported into your chosen library.
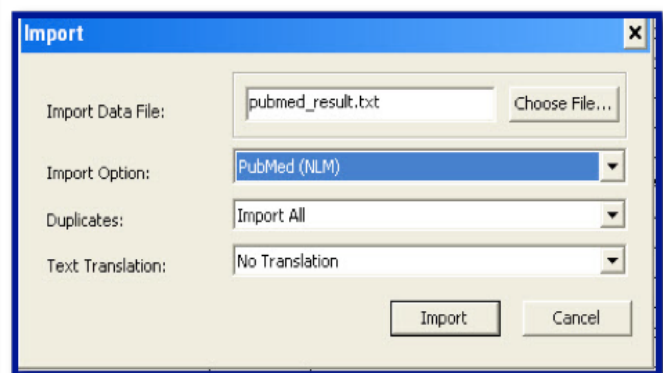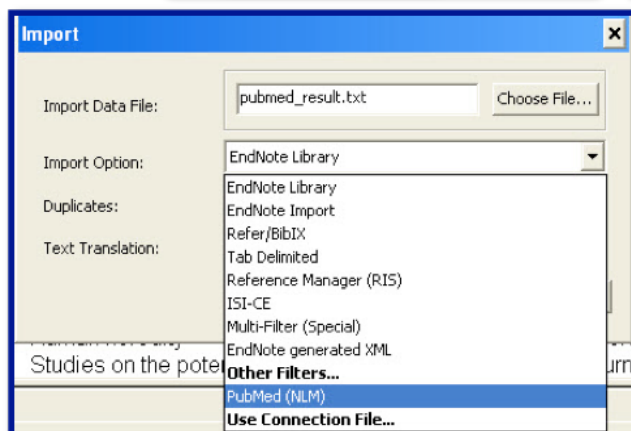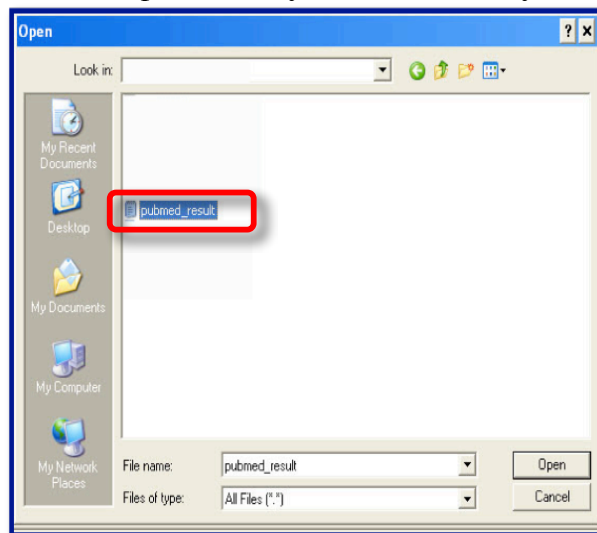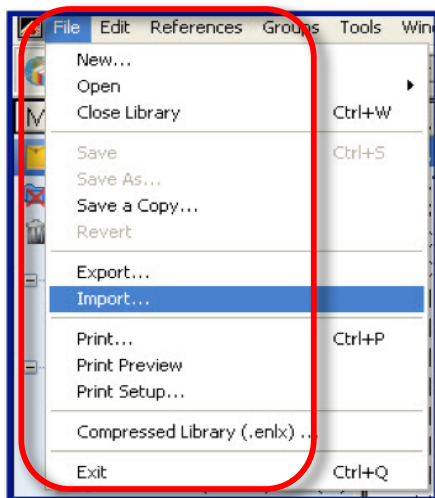
Databases with Direct Export

An increasing number of database providers are developing Direct Export support to EndNote. Direct Export transfers references from a Web-based resource directly into EndNote. Many providers have different names for EndNote Direct Export such as *Export*, *Export to Citation Manager*, or *Export to Bibliographic Management Software*. The Direct Export function in a database may:

1. Automatically find and open EndNote if it is installed on your computer. It then downloads your selected references into your chosen EndNote Library.
2. You may be prompted to manually locate your EndNote library (i.e., the drive/folder/subfolder where you created your EndNote library). Select a library to be opened.
3. Direct Export option for Mac users of EndNote may prompt you to identify the correct filter in your EndNote **Filter Manager**.

The direct export option in ***ProQues***t.
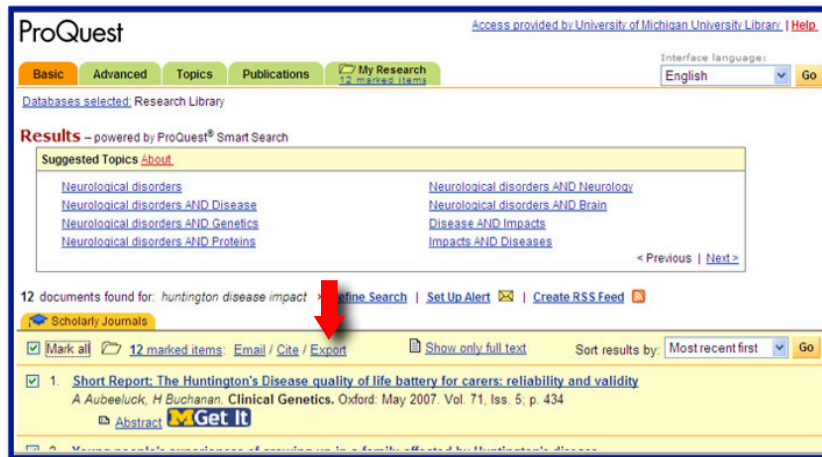
5. The direct export for **ISI Web of Knowledge** databases.
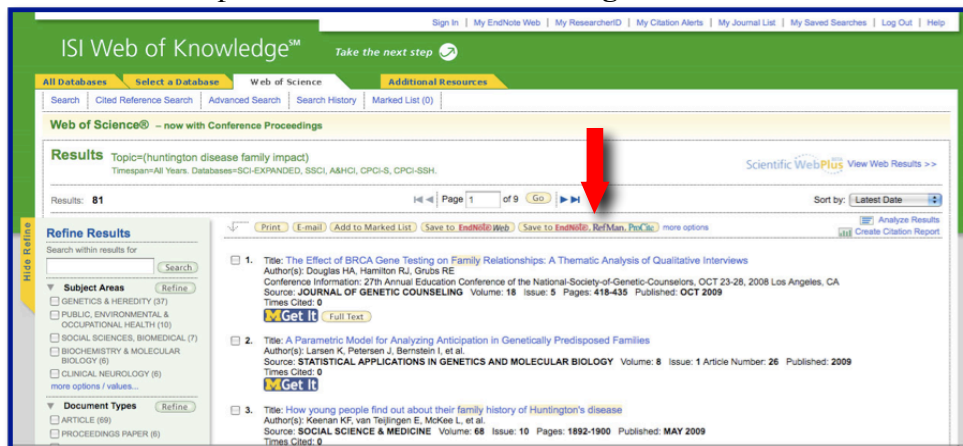
6. The direct export for **Embase**.
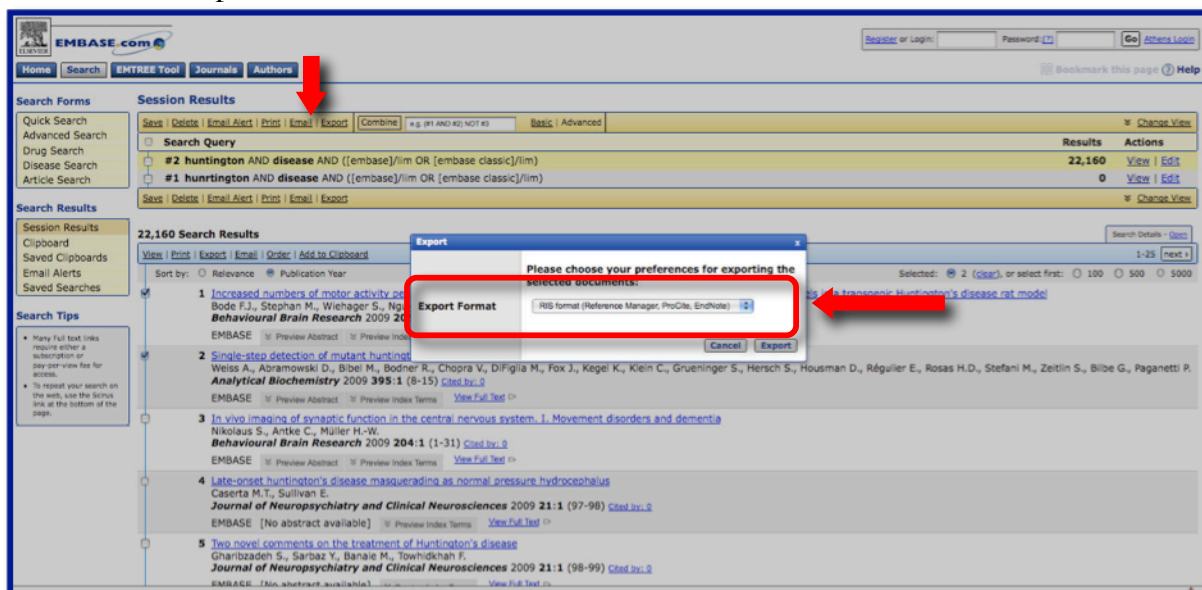
7. The direct export for **Scopus**.
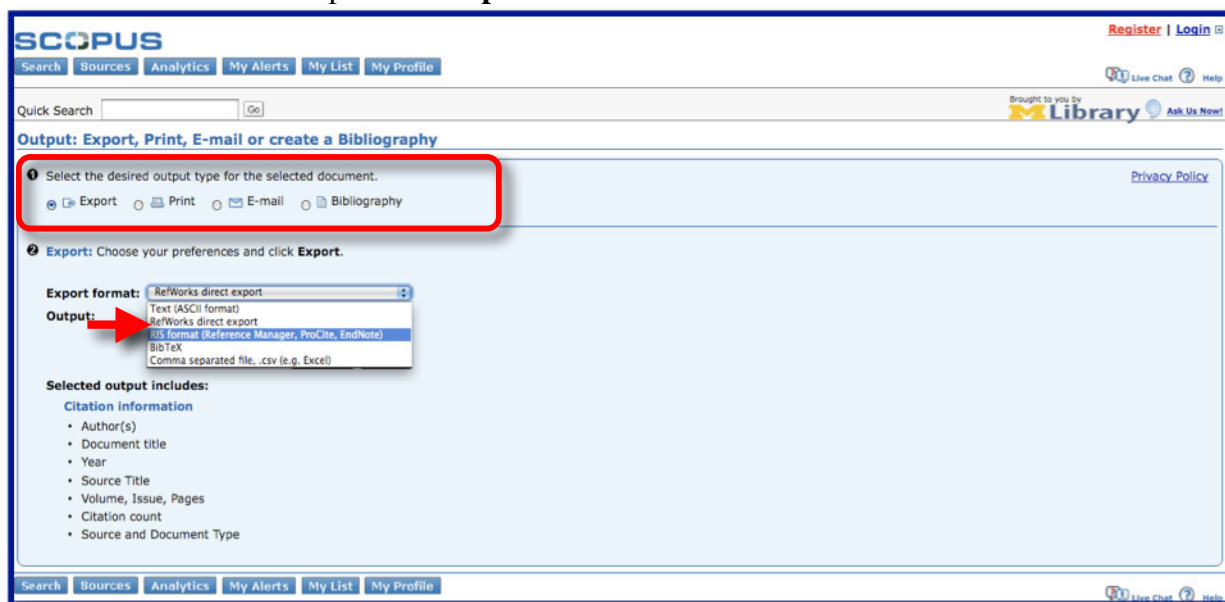
Configuring Google Scholar With An EndNote Direct Export Option

What is Google Scholar?
- Broad literature searches.
- Access is free via any browser.

To set Google Scholar to work with EndNote:

You will first need to:

1. Going to http://scholar.google.com or Google @ UM http://scholar.google.com.proxy.lib.umich.edu/ .

2. Click on Settings.

3. On the "Bibliography Manager" section select "Show links to import citations into" and "EndNote from the menu .
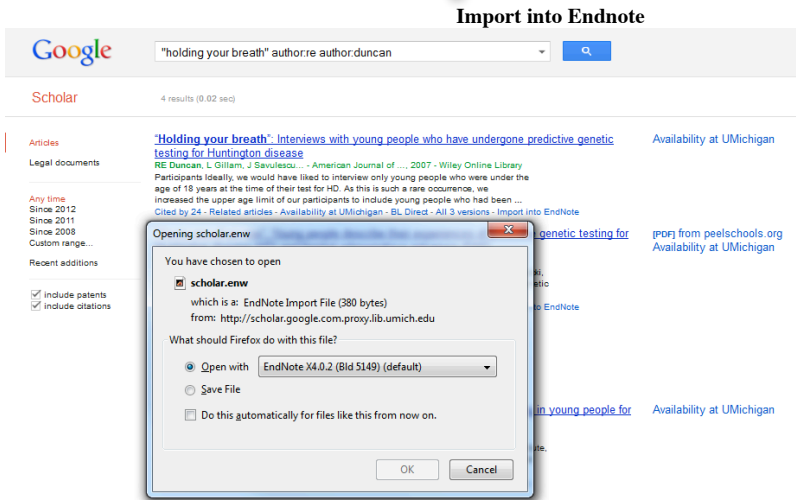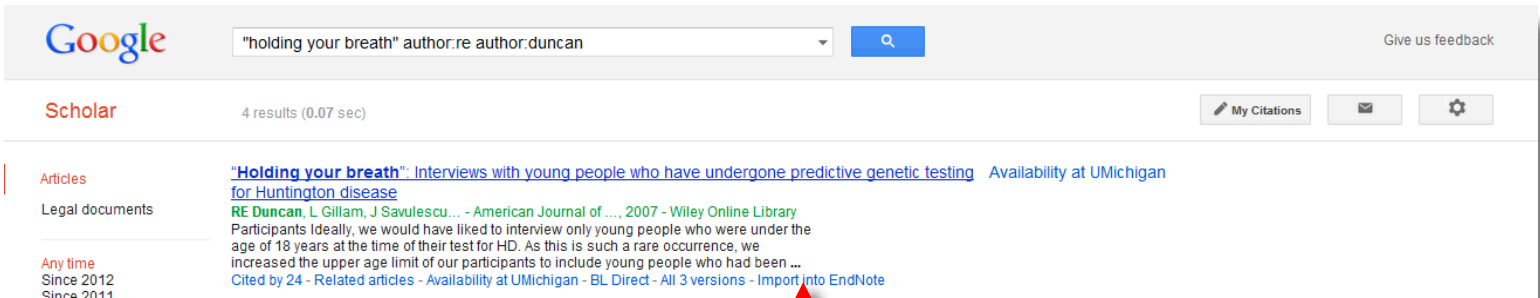

4. Click Save.
You are returned to the Google Scholar search page, where you can perform a search.
Each search result will include the button Import into EndNote.
Finding a specific article in Google Scholar:
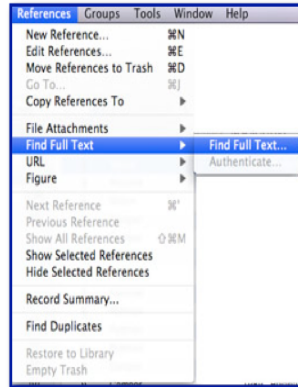Select *Advanced Scholar Search*.

Import into Endnote

Finding Full Text

There are two methods for finding full-text PDFs of references in your EndNote Library.

1. Using the Find Full Text command under the References drop-down menu.

➢Select the reference(s) to which you want to add full text.

➢In the library window, you can highlight up to 1000 references. For example, you can select a single reference, or hold down the Command or control key to highlight individual references, or use Edit –> Select All to select an entire Group of displayed references. Or, open an individual reference for editing.

➢From the References menu, select Find Full Text.

➢EndNote begins searching for and downloading full text for the selected references.

➢To the lower left, you will see the Find Full Text reporting area where it will tell you that it is searching, has found or not found the PDF or has found a URL.
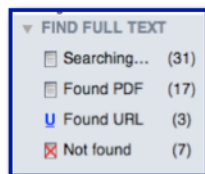
2. Configuring the Open URL resolver to retrieve full text owned by UM.
    ➢Go to the Edit menu and choose Preferences….
    ➢From the list on the left, select Find Full Text.
    ➢Check the boxes for all of the options.
    ➢Type this URL into the OpenURL Path textbox:
         http://mgetit.lib.umich.edu/
    ➢Type this URL into the Authenticate with URL textbox:
         http://proxy.lib.umich.edu/
    ➢Click the Save button and close the Preferences dialog box.
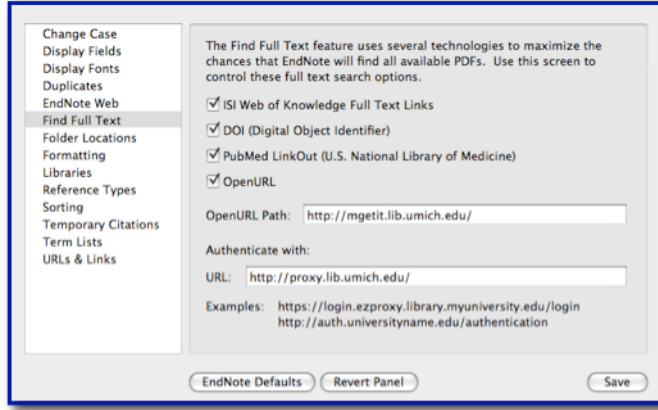

EndNote and Word
The EndNote Add-in
➢ The Add-in is loaded into your word processor program when you load EndNote and gives direct access to your library while writing a document.
➢ It enables EndNote to do all of the bibliographic formatting.
➢ The Add-in commands are loaded into the **Tools** menu of your word processor program and/or with an EndNote toolbar.
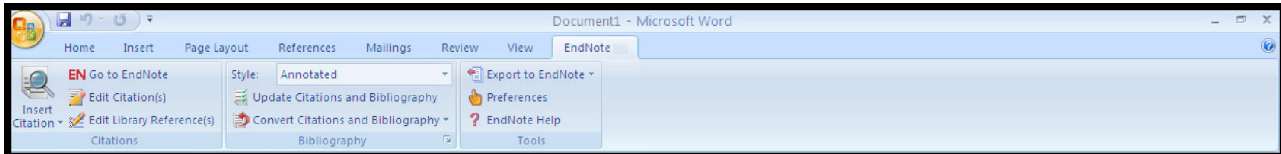
*Windows Word 2007 Toolbar*
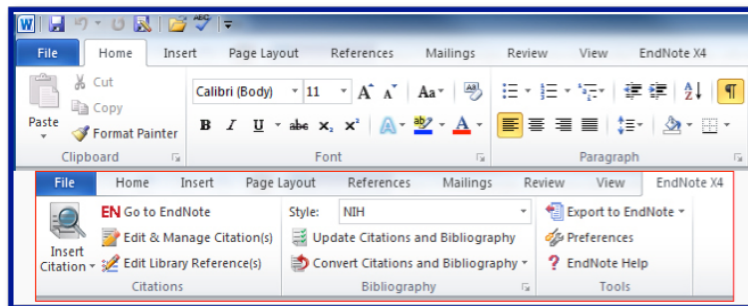
Windows Word 2010 Toolbar


Mac Toolbar

Cite While You Write (CWYW)
➢ This instant formatting feature creates your bibliography as you type.
➢ As you insert a citation in your document, EndNote formats the in-text citation and builds the bibliography instantly.
➢ If you use **CWYW**, make sure that you select the formatting style in EndNote before you begin the document.

To enable or disable Instant Formatting (CWYW)
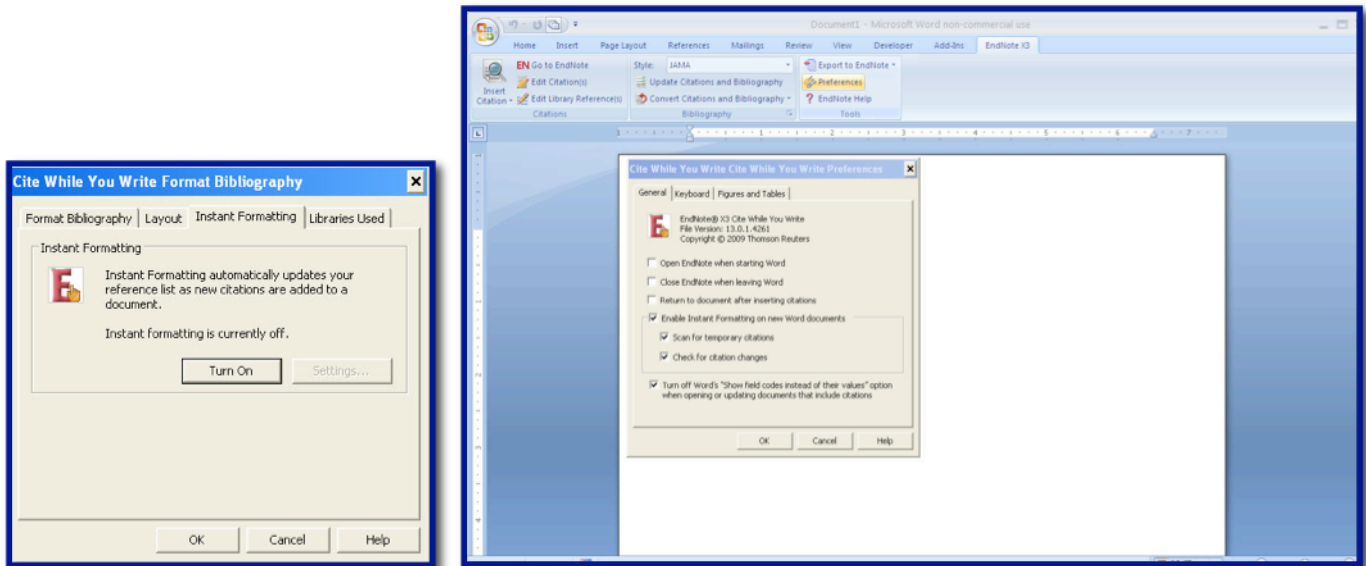
Output Styles
- ➢ *Output Styles* are bibliographic styles contained in a **Styles** folder in your EndNote software.
- ➢ The folder contains individual styles that make it possible to format a word document to meet a particular style.
- ➢ The default styles are *Annotated*, *Author-Date*, and *Numbered*.
- ➢ To add additional styles to the list in your library styles drop-down menu activate the **Select Another Style…**command.
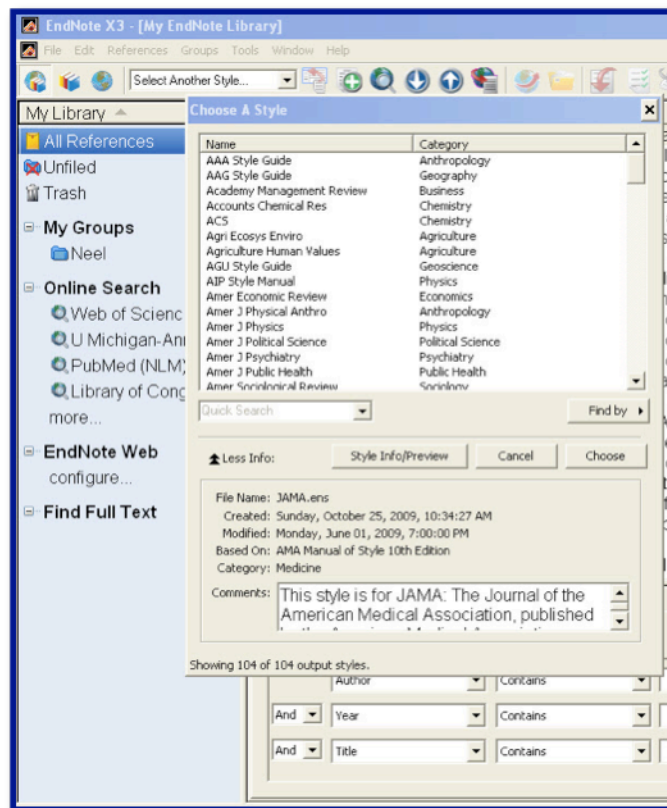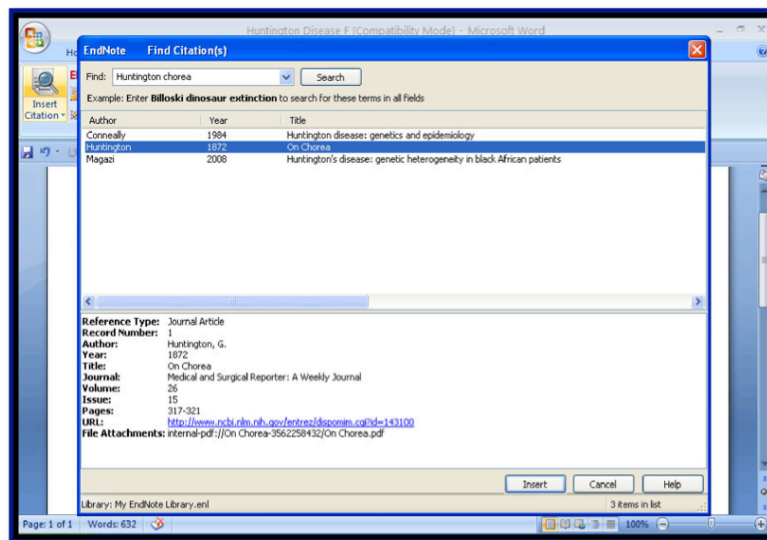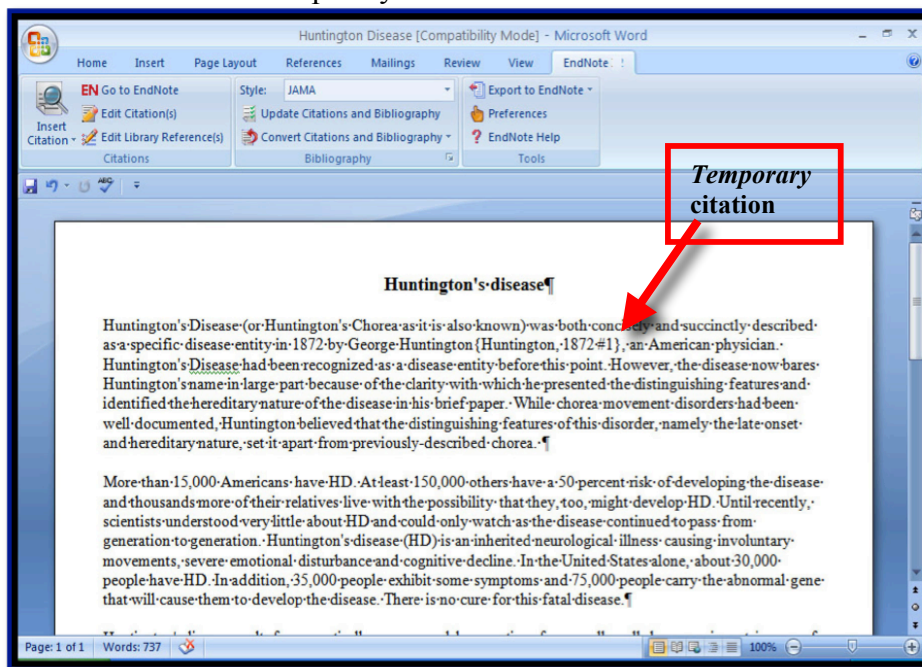

Inserting Citations Into A Document
- ➢ Inserting A Single Citation.
  - ❖This can be done in either of two ways:
1. Have your document and your EndNote library open.
2. Place your cursor at the point that you wish to cite a reference from your library.
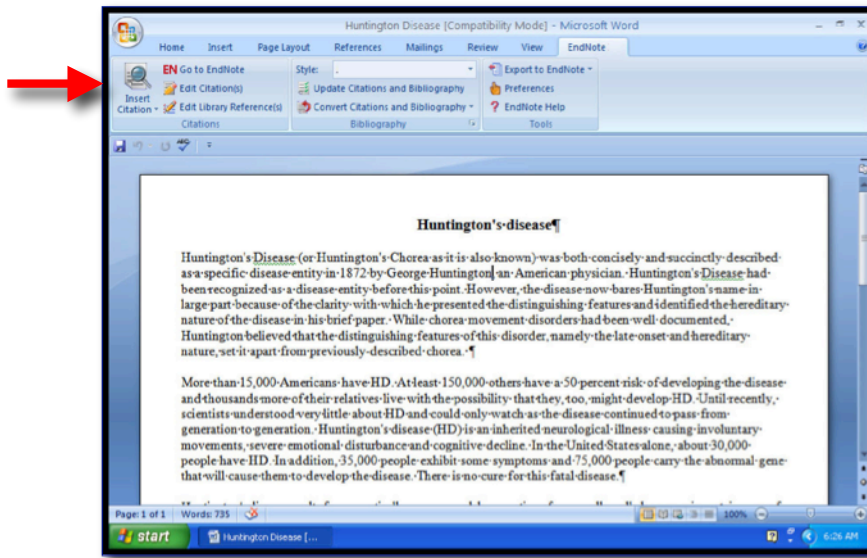
4. Search for the citation that you wish to insert.

5. If several match your search select the correct one and click Insert.
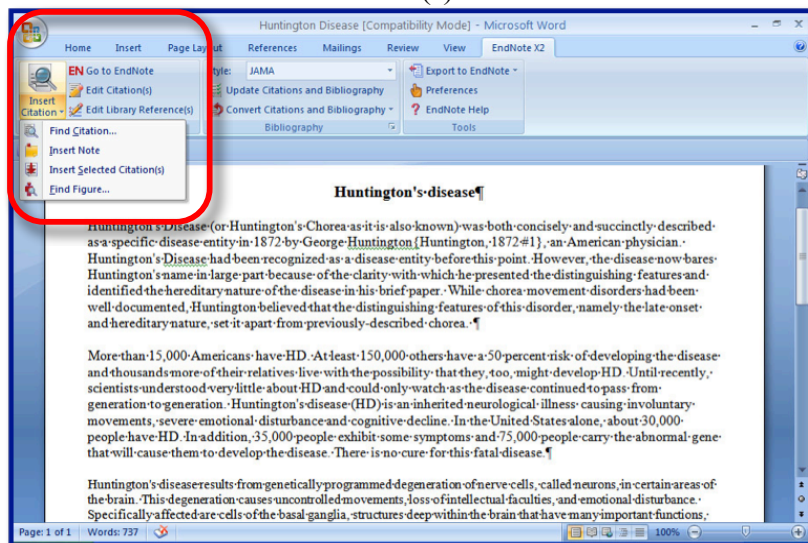

6. The citation will be inserted with a temporary hold format.

❖The other way:
1. Highlight the citation in your library.
2. Go to your document and place the cursor at the point that you wish to insert the citation.
3. Select Insert Selected Citation(s)

### *Inserting Multiple Citations Into A Document*

Hold down the shift key to select a continuous range of citations in order to highlight those you wish to insert into your document or the Command key on a Windows computer or the Apple Option on a Mac computer while clicking on the desired citation(s) in the library in order to highlight those you wish to insert in your document.

Formatting A Document

➢ Once all citations have been entered you are ready to format the in text citations and a bibliography.
➢ If you have selected a style or a list of styles from the many that come with EndNote they appear in your Endnote library toolbar drop-down menu.
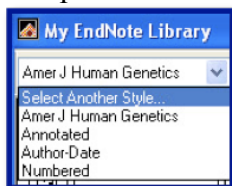
➢ The style that is set in this window will be the style that the document will be formatted in.
➢ In the Word document EndNote tab, the style will also appear.
➢ If you wish to find another style select **Select Another Style…**and a window will open with a list of all the styles available.
➢ To format the document select **Update Citations and Bibliography** on the Word Endnote tab.
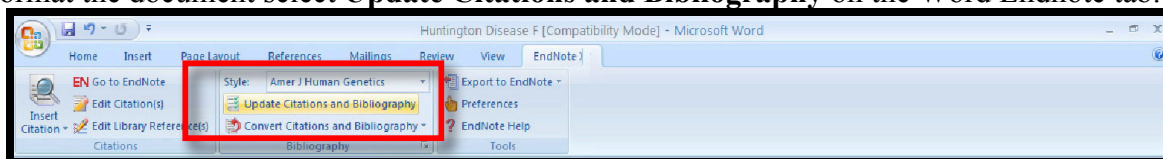
Add References to a Formatted Document

➢ If you need to update citations or add more citations to a paper that has already been formatted:
1. Make the changes or insert the new citations into the text.
2. Select **Update Citations and Bibliography** on the Word Endnote tab.

Reformatting the Document to a Different Style

➢ Select the new style.
➢ Select **Update Citations and Bibliography** on the Word Endnote tab.
➢ You can format your citations and bibliography as many times as you like, changing the output style and various other layout settings each time.