

Introduction to EndNote X9

Training Notes (ver 1)

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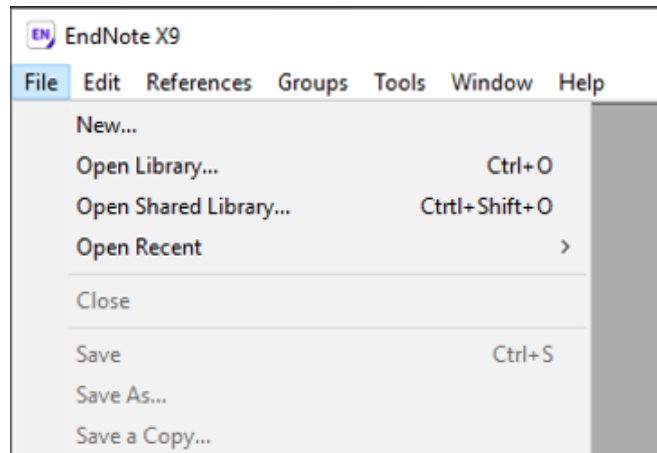
- A. CUSTOM INSTALLATION
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HELP?

- The Help function can also provide assistance by clicking on Help on the menu.
- The extended list of import filters, connection files and output styles can be downloaded from www.endnote.com. This includes connection files for a number of local University Library catalogues.
- Monash University preferred Harvard style, and a superior Vancouver style can be found at : <https://web.library.uq.edu.au/research-tools-techniques/referencing/referencing-software/endnote/output-styles>

1. CREATING A NEW ENDNOTE LIBRARY

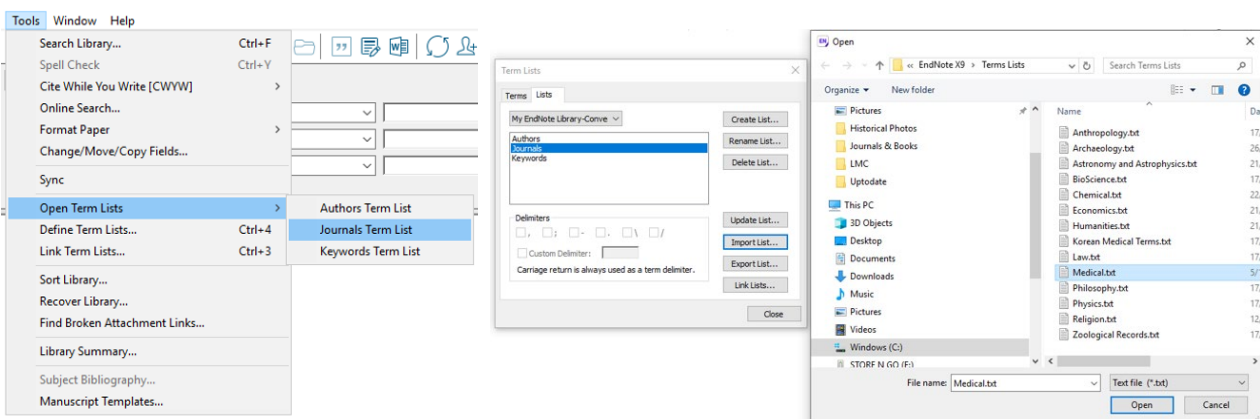
1. Start the EndNote Program.
2. Select under File > New
3. Create the name of your library, and choose location to save.



2. JOURNAL TERMS LIST

To help EndNote correctly abbreviate Journal names it is useful to download the Medical journal “Term List” when creating a new EndNote Library.

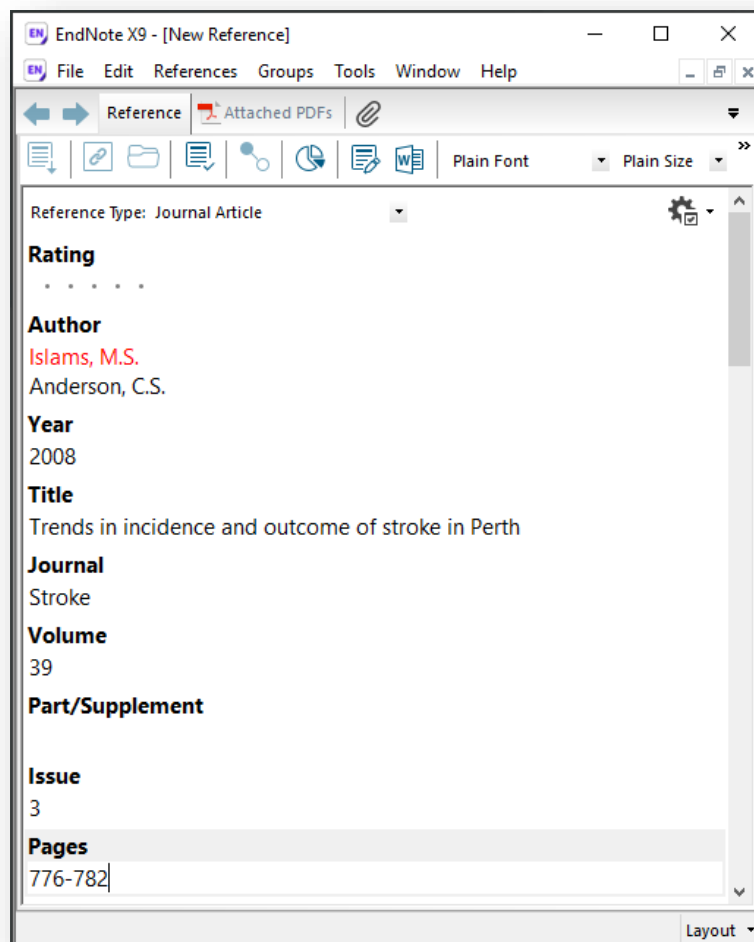
1. From the Tools menu, select **Open Term Lists**
2. Click on the **Journals Term List**, and select the **Lists tab**.
3. From the box select **Import list**.
4. Find the Term List directory which is located in the EndNote program folder ie c:\Program Files\EndNote X9\Terms Lists\
5. Click on **Medical.txt** and Open to import Term List.



3. MANUALLY INPUTTING REFERENCES

Although it is much faster to input references (citations) using bibliographic databases, sometimes references from books or journals will need to be typed into your EndNote library manually.

1. From the **References** menu select **New Reference**
2. Select type of reference from the pull-down box, Journal Article, Book or Webpage are the most commonly used.
3. For example type in the following Journal reference :



4. When the reference is completed you will need to click on file and save and then close the window.

TIP : To input organisations as authors put a comma at the end of the organisation name ie : **World Health Organization,**

TIP : If your reference is not from a journal will need to change the Reference Type to the applicable source, such as book, book section, webpage etc.

EndNote fields used for Book reference:

Author

Bonita, R.
Beaglehole, R.
Kjellstrom, T.

Year

2006

Title

Basic epidemiology

Place Published

Geneva

Publisher

World Health Organization

Edition

2nd

Reference when formatted for **Vancouver** style:
Bonita R, Beaglehole R, Kjellstrom T. Basic epidemiology. 2nd ed. Geneva: World Health Organization; 2006.

Reference when formatted for **Harvard UQ** style:
Bonita, R, Beaglehole, R & Kjellstrom, T 2006, *Basic epidemiology*, 2nd edn, World Health Organization, Geneva.

Reference when formatted for **APA 6th** style:
Bonita, R., Beaglehole, R., & Kjellstrom, T. (2006). *Basic epidemiology* (2nd ed.). Geneva: World Health Organization.

Fields used for Webpage reference:

Author

Quit Victoria,

Year

Title

Nicotine replacement therapy: questions answered

Place Published

Melbourne

Publisher

Quit Victoria

Access Year

2018

Access Date

22 June

URL

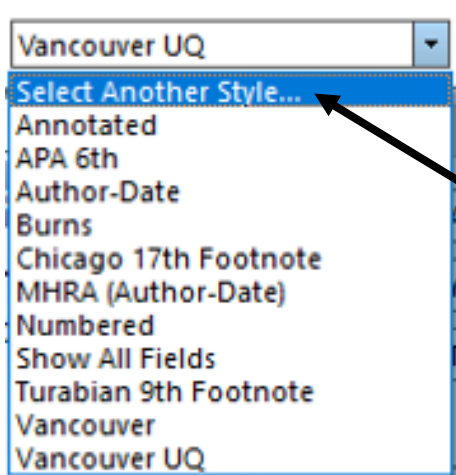
<https://www.quit.org.au/>

Reference when formatted for **Vancouver** style:
Quit Victoria. Nicotine replacement therapy: questions answered. Melbourne: Quit Victoria; [cited 2018 22 June]; Available from: <https://www.quit.org.au/>

Reference when formatted for **Harvard** style:
QUIT VICTORIA. *Nicotine replacement therapy: questions answered* [Online]. Melbourne: Quit Victoria. Available: <https://www.quit.org.au/> [Accessed 22 June 2018].

4. CHOOSING OUTPUT STYLES IN ENDNOTE

Journals and Books require references to recorded in specific styles, often with journal titles abbreviated. The Vancouver style is generally used with journals, whereas the Harvard style is often used with books. The style used by a specific journal can also be found by using the Style pull-down box on the EndNote toolbar, and selecting Select another style :



Note: styles can be further edited by going to :

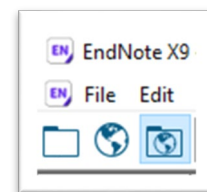
Edit ➔ **Output Styles** ➔ **Open Style Manager**

After finding the specific Style required, select **Edit** and field to edit, such as Journal Name format, the citation template or bibliography template.

5. ONLINE SEARCH (USING A CONNECTION FILE)

Databases such as Medline (PubMed) can be searched without leaving EndNote by using **Online Search**. Three search modes are available when using online search.

- **Integrated Library and Online Search Mode**
- **Online Search Mode** (Temporary Library)
- **Local Library Mode**



TIP : Online Search Mode is the safest mode, avoiding accidentally dumping irrelevant citations into your EndNote library. Use the search mode icons, on the top left-hand side of the screen, to change modes.

From the EndNote side panel under **Online Search** click on **PubMed** (NLM)

The search screen will appear at the top of the screen.

A screenshot of the EndNote search interface. It shows a search bar with 'Search' and 'Options' buttons. Below the search bar are three rows of search criteria: 'Author' with a dropdown arrow, 'Contains' with a dropdown arrow, and 'tobias, m' in the text field; 'And' with a dropdown arrow, 'Year' with a dropdown arrow, 'Contains' with a dropdown arrow, and an empty text field; 'And' with a dropdown arrow, 'Title' with a dropdown arrow, 'Contains' with a dropdown arrow, and 'stroke surveillance' in the text field.

Move selected citations to library using the **Copy to Local Library** icon.

A screenshot of the EndNote X9 interface. The top menu bar includes 'File', 'Edit', 'References', 'Groups', 'Tools', 'Window', and 'Help'. The toolbar shows various icons, including a 'Copy to Local Library' icon. The search interface is visible, showing the same search criteria as the previous image. Below the search interface, a list of search results is displayed. The first result is highlighted in blue: 'Tobias, M.; Cheung, J.; Carter, K.; Anderson, ... 2007 Stroke surveillance: population-based estimates and ...'. The left sidebar shows the library structure, including 'My Library', 'All References (2)', 'Sync Status...', 'Recently Added (2)', 'Unfiled (2)', 'Trash (0)', 'Kidney Research', 'Statistics (0)', and 'Thesis'.

Within the list of Online Search connections (find under Tools tab) are many useful sites for finding **book references** which include :

- **Monash University**
- **University of Melbourne**
- **National Library of Medicine**
- **Library of Congress**

6. DIRECT EXPORT OF REFERENCES INTO ENDNOTE

After completing a search of a database, references can be exported directly to an EndNote library. This process is supported by Ovid databases, PubMed, Google Scholar, and also many ejournals for direct export of individual citations.

The following screen examples are from **Ovid Medline**:

1. Select the **Export** option at the top of the results screen.

Print Email **Export** + My Projects Keep Selected To search Open Access content on Ovid, go to [Basic Search](#).

All Range Clear [Menu] 10 Per Page

1. **Unintended effects of statins in men and women in England and Wales: population based cohort study using the QResearch database.** Abstract Reference Complete Reference

Hippisley-Cox J, Coupland C

BMJ. 340:c2197, 2010 May 20.

[Journal Article. Multicenter Study]

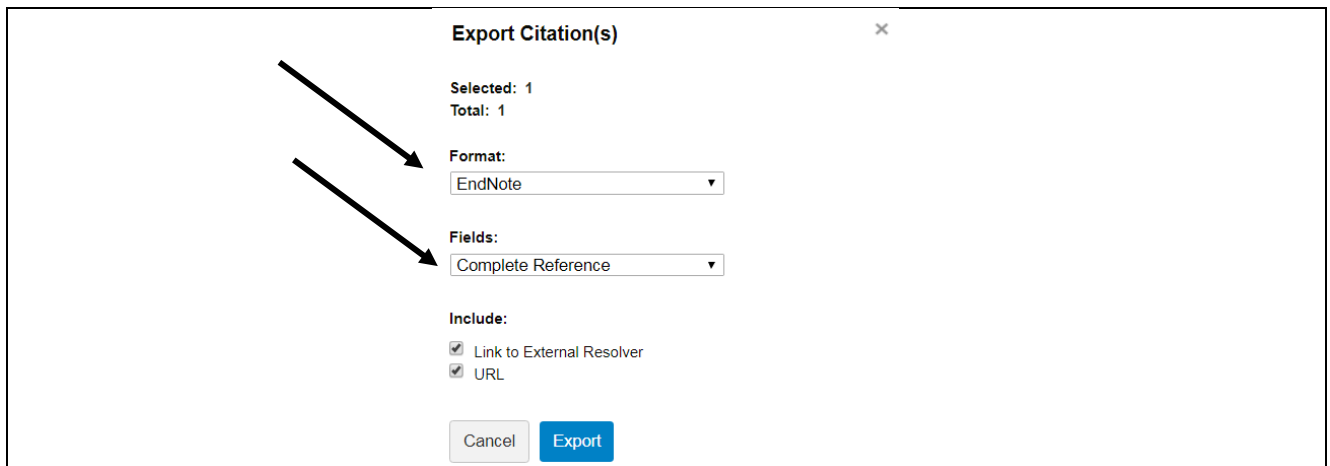
UI: 20488911

Title Comment

Comment in: BMJ. 2010;340:c2240; PMID: 20488914 [<https://www.ncbi.nlm.nih.gov/pub...>]

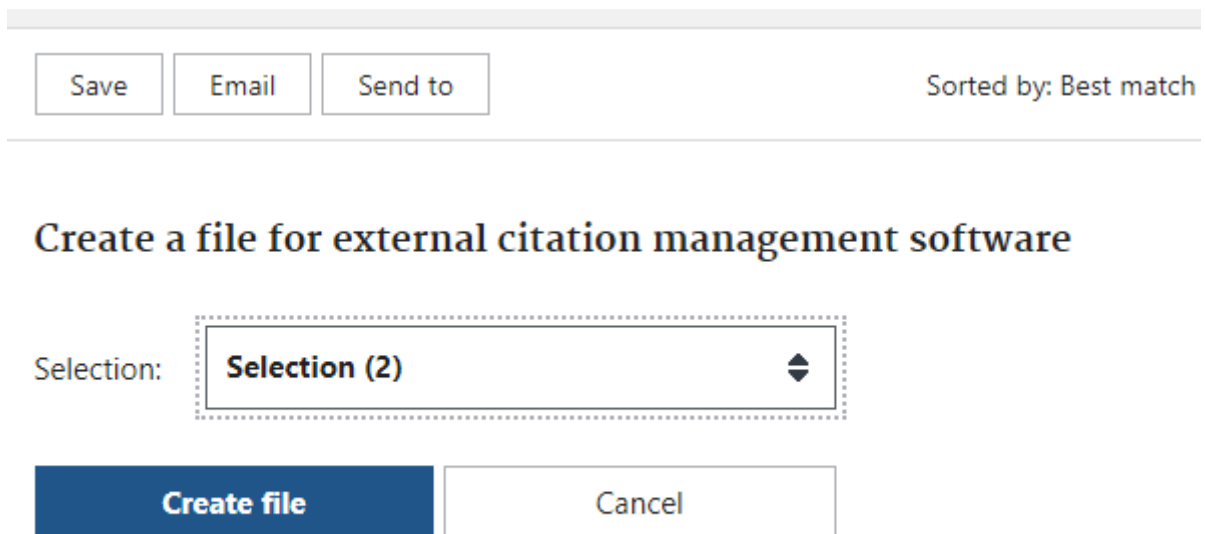
Find Similar Find Citing Articles Full Text

2. Select export to **EndNote** in the format drop-down box, and change fields to Complete reference, and click on **Export** :



The following screen example is from **PubMed**:

When using PubMed there is a method to export selected citations into EndNote, by using the **Send to** option, choosing **Citation Manager** for the destination, and clicking on **Create File** to start the process.



The following screen examples are from **Google Scholar**:

When using Google Scholar (scholar.google.com) you can use settings to choose EndNote as your Bibliography manager.

Bibliography manager

Don't show any citation import links.
 Show links to import citations into **EndNote**

After completing a search use the **Import into EndNote** link under selected references to start the direct export process of the citation.

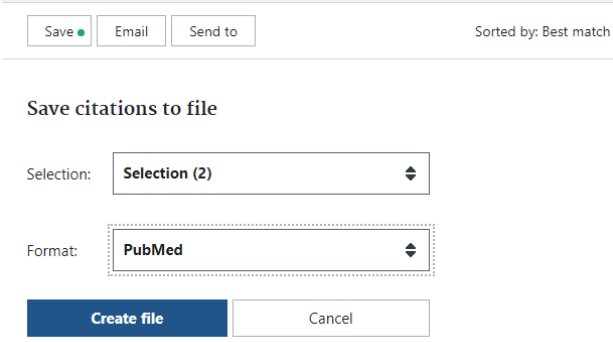
[Effects of AIN457, a fully human antibody to interleukin-17A, on psoriasis, rheumatoid arthritis, and uveitis](#)
 ..., Rheumatoid Arthritis Study Group... - Science translational ..., 2010 - stm.sciencemag.org
 Interleukin-17A (IL-17A) is elaborated by the T helper 17 (TH 17) subset of TH cells and exhibits potent proinflammatory properties in animal models of autoimmunity, including collagen-induced arthritis, experimental autoimmune encephalomyelitis, and experimental ...
[☆](#) [🔗](#) [Cited by 773](#) [Related articles](#) [All 10 versions](#) [Import into EndNote](#) [🔗](#)

7. IMPORTING REFERENCES (USING AN IMPORT FILTER)

EndNote is able to import references which have been **saved as a file** when using databases such as PubMed or Ovid Medline.

Step 1 is to save references in the **correct format** when using a database so that EndNote can interpret fields when importing data.

<p>Export Citation(s)</p> <p>Selected: 1-3 Total: 3</p> <p>Format: <input type="text" value="Reprint/Medlars"/></p> <p>Fields: <input type="text" value="Complete Reference"/></p>	<p>Use the Export option to save records in Ovid databases.</p> <p>Select the Reprint/Medlars format before saving your records when searching Ovid Medline.</p> <p>Choose Fields: Complete Reference</p>
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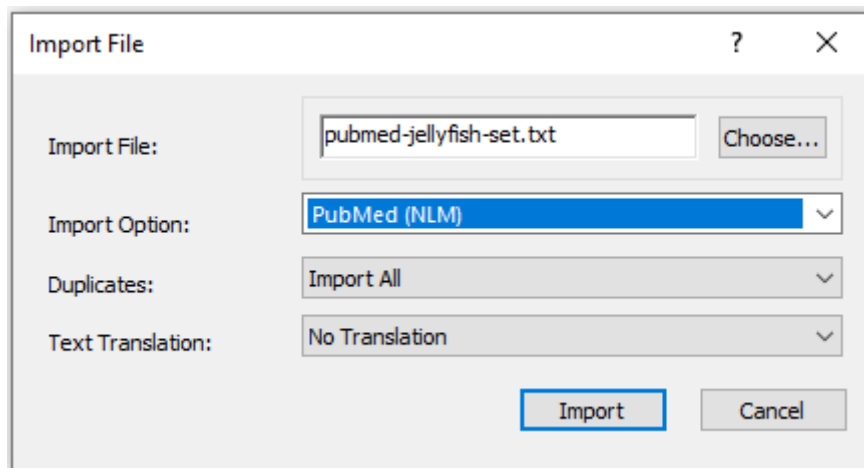
	<p>When saving records in the PubMed database click on the Save button, change Format to PubMed, and click Create file.</p>
---	--

Step 2 is to import the file of references into EndNote, choose from the toolbar :

File ➔ **Import** ➔ **Choose File** ➔ *locate file*

From the **Import Option** list choose **Other filters** to find correct file format, then click on **Import**.

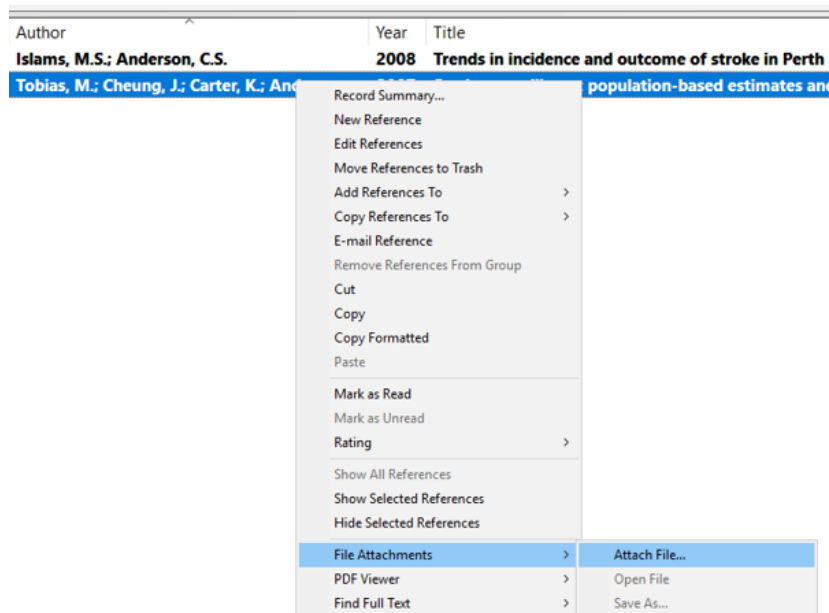
Common import filters : PubMed (NLM), MEDLINE (OvidSP), EMBASE (OvidSP), CINAHL (Ebscohost), PsycInfo (Ebscohost).



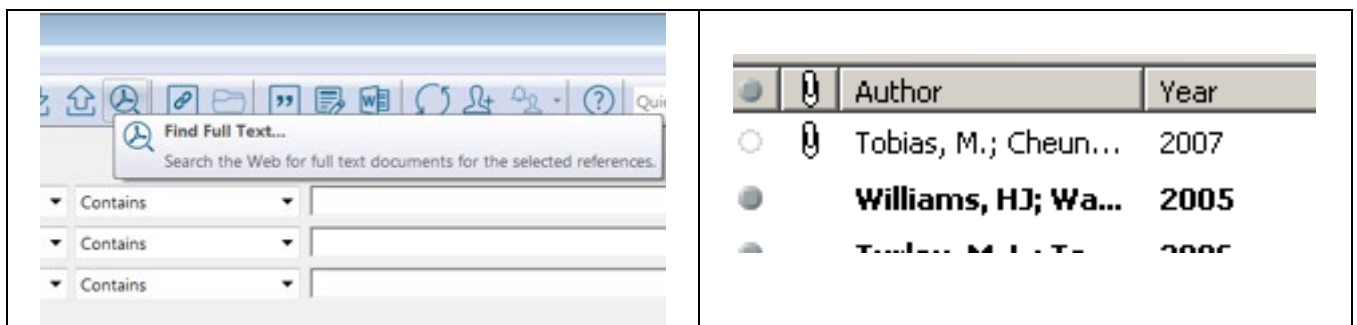
8. PDF's

PDF's and ATTACHMENTS

If you wish to link references to PDF's (or other document types), this can be done manually by highlighting a reference in EndNote and using the right-hand mouse button to select **Files Attachments**, then **Attach File**.



EndNote can also assist the searching and downloading references which are listed by highlighting the reference(s) of interest and then clicking on the Find Full Text ICON and the system will attempt to download the PDF document if possible. A successful download will be indicated by a paperclip icon next to the reference in the display.



9. GROUPS & RESEARCH NOTES

After you have successfully added references into your EndNote Library, individual references can be made more useful by adding research notes, or labels; creating EndNote groups, and linking full-text pdfs to references.

ADDING DATA TO FIELDS

Double click any reference and add your own information to fields within a reference, ie research notes.

2007/12/18 09:00
Aust N Z J Public Health. 2007 Dec;31(6):520-5.

Research Notes

Key article on incidence, prevalence and mortality of stroke in New Zealand. AC

JRL

<http://www.ncbi.nlm.nih.gov/pubmed/18081570>

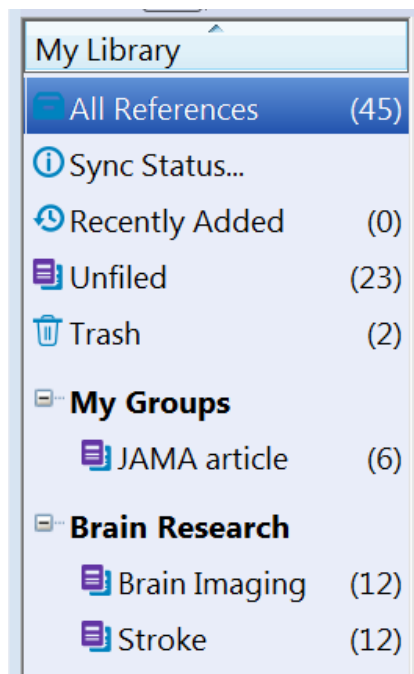
File Attachments

Information can be added to the **Label** field, which will be displayed in the reference summary line screen, and can be used when searching your library.

Author	Year	Title	Rating	Journal/Secondary Title	Author Address	Label	
Tobias, M.; Cheun...	2007	Stroke surveillance: population-based estimates and ...		Aust N Z J Public Health	Public Health Intellig...	AUST STROKE STUDY	1
Turley, M. L.; To...	2006	Cardiovascular mortality attributable to high ...		Aust N Z J Public Health	Public Health Inte...		1

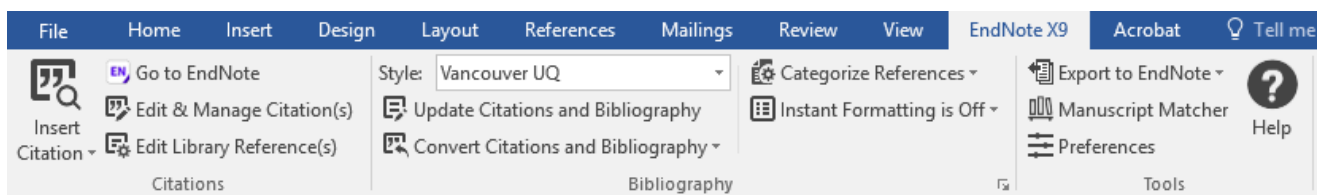
GROUPS

Under the Group tab at the top of the EndNote screen are options to create a **Group**, create a **Smart Group**, and create a **Group Set**. Groups allow you to manually group references together by dragging and dropping. Smart groups use a search profile to automatically add references into a group. Group sets are useful to further divide a topic into smaller sub-divisions.



10. USING ENDNOTE WITH MICROSOFT WORD

When EndNote is installed on a computer, an EndNote tab is added to **Microsoft Word**. Icons are available to allow you to find references in your EndNote library and insert these as citations into your document



Class Exercise :

Although stroke rates appear to be decreasing,¹ population ageing will intensify the disease and the need for effective management strategies.²

1. Islam MS, Anderson CS. Trends in incidence and outcome of stroke in Perth. *Stroke*. 2008;39(3):776-82.
2. Tobias M, Cheung J, Carter K, Anderson C, Feigin VL. Stroke surveillance: population-based estimates and projections for New Zealand. *Aust N Z J Public Health*. 2007;31(6):520-5.

MS WORD ENDNOTE ICONS

Search + Go to EndNote Use these to find references you need to cite.

Edit & Manage Citations Move mouse cursor just before in-text citation marker, and click, grey highlight indicates citation can be edited.

Update Citations & Bibliography Use to reformat paper updating any citation deletions or changes to style, etc, Use to convert document from an unformatted state to formatted.

Convert Citations & Bibliography this is a pull-down screen with the following icons : **Convert to Unformatted Citations** This will remove the formatted bibliography references from your document, and convert the in-text citation to a format like {Smith, 2012, #13}. This will also switch off instant formatting.

Convert to Plain Text Use this to convert your document to a safer format for proof reading and sending to a publisher for review.

Other useful controls can be found in the Format Bibliography options. To display the options click on the small down arrow to the right of the label "Bibliography". Layout will allow you to change bibliography font and font size

You can change the style of your referencing by using the Style pull-down box. However if you need to change the format of your in-text citations or bibliography references for a specific style, this needs to be done via the EndNote program using Edit Output Style. There is a template for in-text citations and templates for reference types where small changes can be made to change the final look of citations and references.

Important features to explore are :

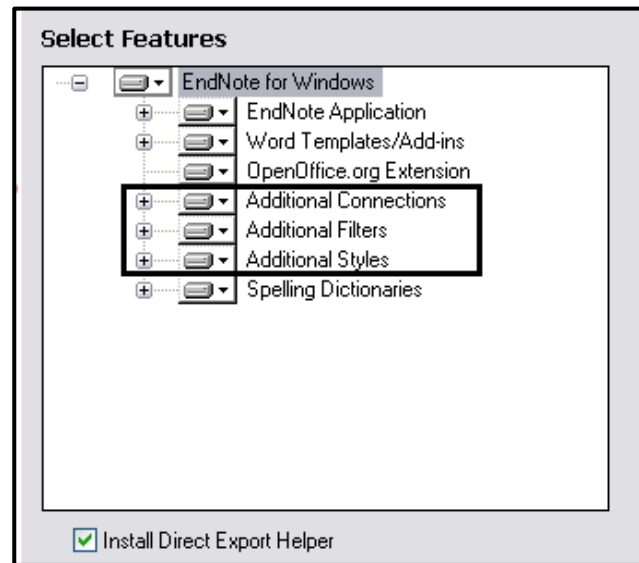
- Turning on and off Instant formatting option
- Using Update Citations & Bibliography to format document
- Inserting citations using different display options

APPENDIX

A. CUSTOM INSTALLATION

EndNote X6 only installs a selection of the most popular filters, connection files and output styles by default. To install ALL available files:

1. Select the Custom option during installation.
2. Choose Entire feature will be installed on local drive from the pull-down menu of Additional Filters. Repeat the previous step for Additional Styles.



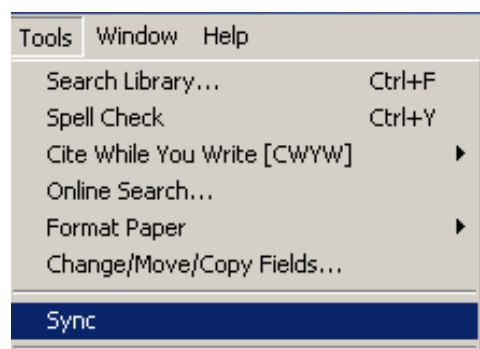
B. ENDNOTE BASIC

EndNote users have the option to create an **EndNote Online** account, which is very useful as either a backup of your PC/MAC version, or as a method of using EndNote entirely.

An account can be created at :

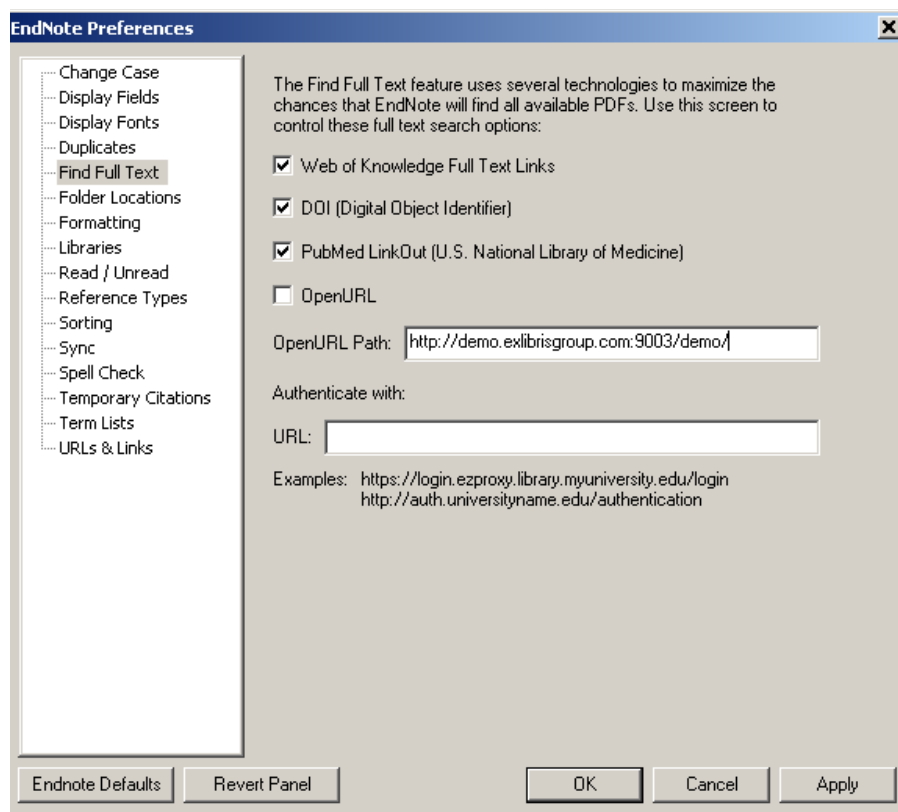
<https://access.clarivate.com/login?app=endnote>

Under the **Tools** tab users will find a option to **Sync** their library with EndNote Web to keep both versions uptodate. Login details can be stored in preferences.



C. PREFERENCES

EndNote **preferences** can be found via under the **Edit** tab.



TIP : use preferences to :

- Change default display fields in the references summary screen
- remove OpenURL option if Find Full Text is not working
- store login details for EndNote Web sync function