

EndNote Tutorial: February 7th, 2014 – Cathryn Peltz, PhD (cpeltz1@hfhs.org)

1. What is EndNote?

- a. EndNote is a software program that you can use to create, manage and store references for easy access, sharing and dramatically decrease time to cite references in documents.

2. Adding references to your library

- a. Import from PubMed: good for lit searches, single refs
 - i. From PubMed, check citations you want to import EndNote
 - ii. Click 'send to', select file format 'MedLine'
 - iii. Click 'create file' and save in easy place to find (some systems will download automatically)
 - iv. In EndNote, go to File, Import, File and choose file from where you saved it
 - v. Import option, choose other filters and select PubMed (NLM) (if you have done this before it will remember this preference)
 - vi. Click 'import' and refs will appear in library
- b. Import from Medline
 - i. From Medline, check refs you want and click export
 - ii. Select EndNote and complete references then click 'export citation'
 - iii. Supposed to automatically imported into open library but in Windows 8 you will have to click file and click open using EndNote
 - iv. If you have multiple libraries, make sure one you want is open before doing this
- c. Single references through EndNote/PubMed
 - i. Good for small # of refs or a specific ref
 - ii. Click online search icon (globe with magnifying glass)
 - iii. Choose PubMed (or Medline, wherever you think you will find the ref)
 - iv. Choose categories and search
 - v. This version will not automatically add search results to your library but some older versions do, if yours does, delete refs you don't want from search results before performing new search or closing
 - vi. Copy and paste (or highlight, right click and choose copy refs to library) references you want to add
- d. Manually
 - i. Click add new reference icon or select references and new reference
 - ii. Then type in all info yourself
 - iii. Useful for references you can't find online, non-indexed journals, books, etc

3. Citing references in Word

- a. Open EndNote and Word document
- b. In EndNote, highlight references(s) that you want to use
- c. In Word, place cursor where you would like those references cited
- d. Go to EndNote (or Tools – EndNote), Insert citation and insert selected citations
- e. Repeat everywhere you want to cite references
- f. To delete a reference, highlight citation in text and hit delete, it will be removed from list
- g. Tools – EndNote – unformat citations: some people prefer to work in this mode and only format at the end. Also works well if you are changing a lot of refs in a previously cited manuscript

4. Output styles

- a. In EndNote, 'preview' on right hand side will show what reference will look like in bibliography
- b. Pull down menu will change output style and preview
- c. In Word, pull down menu will also change output style (style – output style)
 - i. If no toolbar, go to Tools – EndNote – Format Bibliography – with output style
- d. Location will not change (inside/outside period at end of sentence), you have to do that manually.
- e. What if your journal isn't listed?
 - i. Google it, usually can find it – download and place in styles folder
 - ii. Ask around, can add styles others have created in styles folder
 - iii. Last resort: create new output style
- f. Creating new output style
 - i. Best option: edit existing style, pick one similar to what you need
 - ii. Choose Edit – output styles – new style or edit 'style'
 - iii. Start by looking at the template, which is the order of the style's output (i.e., author, title, year, page numbers, etc)
 - iv. Then can change individual parameters (i.e., author list, order, etc)
 - v. File – save as – name whatever you'd like (if it's for a specific journal, naming it for that journal is most helpful)
 - vi. Go back to Word and select style you just made, or look at preview in EndNote – sometimes there is a lot of trial and error

5. Other

- a. Temporary manuscript group: EndNote will create a group of the references you have linked to a certain manuscript and list it in your library under 'all references'. This group will only exist in the library from which the manuscript was created, but will reappear whenever references are edited in that manuscript from that library.
- b. Sharing documents: references information is embedded, so if you send your document to someone they can reformat the library without your library
 - i. Traveling library
 1. If you have someone else's paper and want the references
 2. If you sent your paper to another author and they added a reference you want in your library (will only import refs you don't already have)
 3. Click "export to endnote" then "export traveling library"
 - ii. Sharing library: if you want someone to have your entire library
 1. Need both EndNote library file and .Data folder
 2. Usually in your 'my documents' and named 'my EndNote library' unless you named it something else
- c. Creating groups: can use to organize references by manuscript or topic, etc – I don't use this at all but details are in info from Sladen
 - i. Create group
 - ii. Create smart group
- d. Finding full text: if available, this feature will link PDFs to references – info also available in packet from Sladen