

Data Management Tool for Research

EndNote-X2

Brief Manual

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<http://www.lib.vt.edu/services/branches/vetmed/images/Endnotemanual.pdf>

Creating an EndNote-X Library/Database

1. Open the EndNote program (*“Get Started with EndNote” window opens up*)
2. Click “**Create a new Library**” button.
3. In the “File-Name” box, type the name for your library/database, e.g. References or Bibliography, etc.
4. **SAVE** the library on the desktop or folder
5. An empty EndNote-X2 library opens up with three panels: a **References** panel, a **Group** panel, and a **Search** panel.

Importing Search Retrievals Directly into EndNote Library

(This method is only for those databases that are free or where you have their Usernames and Passwords)

- 1. Open the EndNote program and open the EndNote Library**
- 2. Go to **TOOLS** and scroll down and click on **Online Search**.**
- 3. A **Choose A Connection** window opens up displaying a list of databases and online catalogs.**
- 4. Select the database you want to be connected to (e.g. **PubMed NLM**) and click the **Choose** button.**
- 5. You will be connected to the selected search database. Select your search options (e.g. search by Author, Keywords, etc) by clicking the down-arrow on the right side of the search window**
- 6. Enter your search terms and click the **SEARCH** button**
- 7. “Confirm Online Search” window with the option to retrieve the citations appears.**
- 8. Click **OK** and the citations will be retrieved from the database and saved into your database..**

Importing Search Retrievals through Filters

(This procedure is used when you have to **import** your search retrievals.
Save your search retrievals as a text file with field tags (e.g. AU, TI, SO, etc.)

1. Open the EndNote-X2 Library.
2. Go to **FILE** and scroll down to **IMPORT**. (*An IMPORT window appears*).
3. Click on **Choose File** button.
4. Go to the site where you have saved your search file (e.g. the desktop), and click on the file.
5. Click **OPEN** and an **Import Window** opens up. (*The filename should appear on the Import Data File window*)
6. From the “**Import Option**” window, select the database (e.g. *PubMed, CABDirect, Web-of-Knowledge*) from the appropriate provider (e.g. *NLM, SP, CSA*) that you searched in. Click on **Other Filters** the filter is not on the List. (*The name of the import filter will appear in the “Import Option” window*)
7. From the “**Duplicates**” window, select your option to exclude duplicates or to import all.
8. Click the **IMPORT** button. (*Your EndNote Library/Database will now have all the imported citations*).

“Exporting” Search Retrievals from CABDIRECT

1. After retrieving your search results from the database:
 - mark the needed citations;
 - Select **EndNote** to export to;
 - and click the **Export** button;
2. “Opening articles (bib-abs).enw” window opens up

Click the radial button to the left of “Open with Web Export Helper(default)” and then click **OK**
3. EndNote program opens the “**Select a Reference Library**” window.
4. Go to where your EndNote database is located, click on it and then click **OPEN** and the citations will be imported.

“Exporting” Search Retrievals from COMPENDEX (from Engineering Village)

1. After retrieving your search results from the database, mark the needed citations, and click the **Download** button.
2. “**Download Selected Records**” window opens up
3. Check the radial button to the left of “**RIS, EndNote, Reference Manager**”
4. Click the **Download** button and “**You have chosen to open**” window opens up
5. Check the radial button to the left of “**Web Export Helper**” and then click **OK**
6. “**Select a Reference Library**” window opens up.
7. Go to where your EndNote database is located (e.g. desktop)
8. Click on the database and then click **OPEN** and the citations will be imported.

“Exporting” Search Retrievals from EBSCOhost databases (e.g. ERIC, PsycINFO, etc)

1. Check the square box to the left of the citations and then click **EXPORT** (*It is above the citations where there are four icons depicting Print, E-mail, Save, and EXPORT*)
2. Check radial button to the left of **Direct Export to EndNote, Procite, or Reference Manager**
3. After retrieving your search results from the database, mark the needed citations by clicking on **Add to Folder** below the citation.
4. On the right hand column, click on **Go to Folder View.**
5. A window opens up showing the citations you have marked.
6. Click **SAVE**
7. An **Open delivery** window appears
8. Check the radial button to the left of **Open with (Web Export Helper)** and click **OK**
9. **Select a Reference Library** Window opens up.
10. Go to where your EndNote database is located (e.g. desktop)
11. Click on the database and then click **OPEN** and the citations will be imported.

Create Smart Group

- Open your EndNote-X2 Library and click **All References**
- Click on **GROUPS** above and scroll down to **Create Smart Group** and a Smart Group Window opens up.
- Click the arrow in the window which has “Author” and select the field you want EndNote-X2 to search, e.g. **Keywords**
- In the Search box on the right enter the keywords you want to search, e.g. **Iron**
- Then click the **Create** Button
- In the Groups Panel on the left of the screen, a **New Smart Group** appears with the number of Iron citations within brackets.
- Click on the **New Smart Group**
- Go back up to **GROUPS** above and click on it.
- Select **Rename Group**
- Enter the name of the group e.g. **Iron**
- Then click on **All References**, and the Smart Group Iron is created

To Delete Smart Group

- Click on the group to be deleted
- Go up to **GROUPS** and select **Delete Group**

Create Custom Group

- Open your EndNote-X2 Library and click **All References**
- Click on **GROUPS** on the top of the screen and scroll down to **Create Group**
- On the **Group Panel** on the left hand side of the screen, a **New Group** opens up under **Custom Groups**
- Type in the name of the group you want to create, e.g. **IRON**, and press **ENTER**
- Then click **All References** to go to your Library
- Hold down the **CRTL-key** and select the citations you want to put into the Group
- Release the **CRTL-Key**
- Then click on one of the citations and **drag and drop** (the other citations that you have selected will follow) into the (Iron) group that you have created

To Delete Group

- Click on the group to be deleted
- Go up to **GROUPS** and select **Delete Group**

To Delete Citations

- Open your EndNote Library and click on **All References**
- Select citation to be deleted from your EndNote Library
- Go up to **REFERENCES**
- Scroll down to **MOVE REFERENCES TO TRASH**

To Retrieve from Trash

- Click “Trash” in the Group Panel on the left hand side of the screen.
- The citation will appear in the “Reference Panel”.
- Click on this citation and **drag and drop** citation into **ALL REFERENCES**

Entering Images into EndNote Library

1. Open your EndNote Library
2. Go to **REFERENCES** and select **New References**. A “*New Reference*” Window opens up.
3. From the **Reference Type** window’s pull-down menu, select **Figure**.
4. Enter the name of the creator, title of the image, date, etc.
5. When you get to the **Figure** field click on it and go up to **REFERENCES** above and select **Figure** and **Attach Figure**.
6. An “**Attach Window**” opens up
7. Click the **Choose File** button
8. Go to where you saved your image (e.g. desktop or a folder) and highlight it and click **OPEN**
9. The image will appear in the **Figure Field**.
10. Go the “**Caption**” field and enter a caption
(this is optional)
11. Close the entry it will be save into your EndNote Library

Entering Charts, Tables, Diagrams, PDF-files, and Power Points, into EndNote Library

1. Open your EndNote Library
2. Go to **REFERENCES** and select **New References**. A “*New Reference*” window opens up.
3. At the **Reference Type** window on top, click on the down-arrow and select **Charts or Tables** from the pull-down menu.
4. Enter the data that you want to enter for the Diagram, Table, Graph, etc.
5. When you get to the **Figure** field click on it and go to **REFERENCES** and select **Figure** and **Attach Figure**
6. An “**Attach Figure**” window opens. Click the **Choose File** button.
7. At the **Look In** window select the site where you have saved your diagram, e.g. the Desktop or Folder.
8. Locate the **Diagram, Table, Graph, Power Point or PDF file** you want to insert and **Click on the file** and then click **OPEN**
9. The **New Reference** window re-appears, showing an icon of imported item in the figure Field.
10. Go to the **Caption** field and type in a caption for your Table (*this is optional*)
11. **Close** the window and the imported Diagram, Table or Graph will be saved into your EndNote Library.

Importing a PDF into an Image field in a citation record in EndNote Library

1. Open the EndNote Library
2. Go to **TOOLS** and scroll down to **SEARCH LIBRARY**
3. Enter search terms and click **SEARCH**
4. Double click on the retrieved citation to open the citation
5. Scroll down and click on the **Figure** field.
6. Go back up and click on **REFERENCES** and scroll down to **Figure** and **Attach Figure**.
7. The Attach Figure window opens, click **CHOOSE FILE** button.
8. Go to the location (e.g. desktop, My Document folder, etc) where you've saved your PDF file.
9. Click on the PDF file and then click **OPEN**
10. The PDF file will be imported into the citation.
11. Close the citation.

Manually Entering Bibliographic Citations/References

This is the procedure for entering references such as books, book chapters, proceedings, electronic citations, patents, etc. and articles not available through database searches.

1. Open the EndNote Library.
2. Go to **REFERENCE** and select **New Reference**
(This opens up an empty New Reference Window)
3. At the **Reference Type** window click on the arrow to the right of the window and select the reference type you want to enter manually (e.g. book section, conference paper, patent, thesis, etc)
4. Enter the bibliographic data into each of the fields in the reference. (*The information on the Title page of the publication is essential information for EndNote to cite that publication correctly*)
5. For **Authors**, enter each author on a separate line.
6. When you have finished, **CLOSE** the reference to save it to the EndNote library

Inserting References from EndNote Library into Manuscript and Formatting Bibliography

1. Open the EndNote Library that contain the references you wish to cite and minimize it so that it will not be in the way.
2. Open the paper that you have saved on your Word Processing Program (e.g. Microsoft Word)
3. Click on **EndNote-X2** on the tool-bar.
4. Position the cursor in the text in your Word-document where you would like to put the citation.
5. In the **Citation** section click on the arrow next to **Insert Citation** and scroll down to **Find Citation**.
6. A **Find Citation(s)** window opens up
7. Enter your search for the references in the “**FIND**” window, and click the **Search** button. (*Reference(s) matching your search will be retrieved*)
8. Click on the reference(s) you want to cite and then click the **INSERT** button on the lower right hand corner
9. Repeat steps 4 through 8 until all you have cited all your references.
10. To format the bibliography, go to the **Bibliography** section and click on the arrow next to **Bibliography**.
11. An **EndNote-X2 Format Bibliography** window opens up.
12. Click the **BROWSE** button on the right side of the **With Output Style** window
13. Select the journal bibliographic style you want from the **With Output Style** window and then click the **OK** button and your citations will be formatted according to the style chosen.

Incorporating Photographs, Charts, Graphs, Tables, etc. in the figure field into the Manuscript

1. Open the EndNote Library that contains the figures you wish to incorporate into your manuscript and minimize it so that it will not in the way .
2. Open the manuscript that you have saved on your Word Processing Program (e.g. Microsoft Word)
3. Click on **EndNote-X2** on the tool-bar.
4. Position the cursor in the text in your Word-document where you want the image or figure to appear.
5. In the **Citation** section, click on the arrow next to **Insert Citation** and scroll down to **Find Figure**.
6. An **EndNote-X2 Find Figure(s)** window opens up
7. In the **Find** box, enter the name you have assigned to the Photograph, Chart or Table in your EndNote Library which you want to insert.
8. Click **SEARCH** (*EndNote displays a single matching reference. The file attachment icon appears in the lower part of the screen*)
9. Click the **INSERT** button at the lower right corner of the screen. (*The Photograph,Chart or Table will load slowly and appears at the location where you want it to be*)
10. To resize the incorporated Photograph, Chart or Table to fit on the page, Click on a corner of the photograph/graph/chart and then hold down the **SHIFT**-key, and drag the photograph/graph/chart to resize it proportionally.
11. Go To **FILE** and **SAVE** (since it is now a Word File)

E-Mailing a Copy of EndNote Library

1. Open EndNote Library, and Click on **All References**
2. Go to **FILE**
3. Scroll down to **COMPRESSED LIBRARY** and **Create & Email**
4. This saved compressed copy of the library will have an extension **.enlx**
5. **SAVED** (to desktop or folder)
6. This saved copy of your EndNote Library can then be send to your collaborator as an attached document to your e-mail

Copying an EndNote Library into another EndNote Library

1. Double click on the library with an extension **.enlx** to open it
2. Go to **EDIT** and **SELECT ALL**
3. Go to **EDIT** and **COPY** (you have now copied the library)
4. Open the library2 you want to copy to
5. Go to **EDIT** and **PASTE**
6. The citations are now pasted in your library2 and they are high-lighted

Sending a Group from EndNote

- Open the EndNote Library and click on the **Group** you want to send
- Click on a citation and then press **CTRL+A** to highlight all the references in the group
- Go to **FILE** and scroll down to **EXPORT**. An ***Export File Name*** window opens up
- Set the output style to **Refman (RIS) Export** in the **Output Style** window
- Make sure that **Export Selected Reference** box is checked
- **SAVE** the references as a text file on the desktop
- Save this text file as an attachment in your e-mail
- When your colleague receives the file, he/she **IMPORT** it into his/her EndNote library selecting **Refman(RIS)** as the filter

Set EndNote-X2 to Not Import Duplicates

- Open your EndNote-X2 library
- Go to **EDIT**
- Select **PREFERENCES** and the Endnote Preferences Window opens up.
- Select **Duplicates** on the left hand panel
- On the right hand column, under **Compare references based on the following Fields**, check the fields you want
- Under the **Online Search Results**, check the square box next to **Automatically discard Duplicates**
- Then click **OK**

Downloading Output Styles from EndNote Homepage

1. Activate browser and go to EndNote's homepage at: <http://www.endnote.com>
2. Click on **support & services**
3. Scroll down to **Downloads** and select **Output Styles** and click **More...**
4. The EndNote Output Styles window will appear.
5. Click the **Sorting Options** tab
6. Click on the arrow of the “**Sort by**” window and select either **Discipline** or **Style Name** or **Date**
7. Click the **Re-sort Files** button on the right side of the screen, and the output styles will be sorted by what you have selected, e.g. the discipline or the Journal Style Name or Date.
8. Scroll and locate the journal output style you want to download, e.g. Veterinary Microbiology, Agricultural and Forest Entomology, etc.
9. Click on the **Download** (on the far right) for the selected journal style, and “**You have chosen to open**” window opens up.
10. Click the radial button to the left of **Save to Disk** and then click **OK**.
11. You have now downloaded the journal output style. Close the EndNote Homepage.
12. Go to the Desktop and right-click on the “*downloaded journal output style*” icon and scroll down and click **CUT**.
13. Double-click **My Computer** to open the C-Drive and then open the **Program File** folder.
14. Locate and open the **EndNote-X2** folder.
15. Go to **EDIT** and **PASTE**. The downloaded journal output style icon will appear on the screen.
16. Click on the downloaded journal output style icon and drag and drop the icon into the **Styles** folder. You have now added the downloaded journal output style to your folder of output styles.

Downloading Import Filters from EndNote Homepage

1. Activate browser and go to EndNote's homepage at:
<http://www.endnote.com>
2. Click on support & services
3. Scroll down to Downloads and select Import Filters and click More...
4. The EndNote Import Filters window will appear.
5. Click on the button of the "Sort by" window select either Information Provider or Database or Date
6. Click the Re-sort Files button on the right side of the screen, and the filters will be sorted by what you have selected, e.g. Databases or Information Providers.
7. Scroll and locate the filter for the database you want to download, e.g. ERIC, Biological Sciences, Compendex, etc.
8. Click on Download (on the far right) for the selected database, and "You Have Chosen to Open" window opens up.
9. Check the radial button for Save to Disk and then click OK.
10. You have now downloaded the filter. Close the EndNote Homepage.
11. Go to Desktop and right-click on the "Downloaded Filter" icon and then scroll down and click CUT.
12. Double click My Computer to open the C-Drive and open the Program File folder.
13. Locate and open the EndNote-X2 folder
14. Go to EDIT and PASTE. The downloaded filter icon will appear on the screen.
15. Click on the downloaded filter icon and drag and drop the icon into the Filter folder . You have now added the downloaded filter to your file of filters.

Downloading Connection Files from EndNote Homepage

1. Activate browser and go to EndNote's homepage at:
<http://www.endnote.com>
- 2.
3. Scroll down to **Downloads** and select **Connection Files** and click **More ...**
4. The EndNote Connection Files window will appear
5. Click on the **Sort by** arrow and select what you wish to sort by (e.g. date, database or provider)
6. Click the **Re-sort Files** button on the right side of the screen, and the Connection Files will be sorted by what you have selected
7. Scroll and locate the Connection File you want to download
8. Click on the **Download** (on the far right) for the selected Connection File.
9. Check the radial button for **Save to Disk** and then click **OK**
10. You have now downloaded the Connection File. Close the EndNote Homepage.
11. Go to the desktop and right-click on the “Downloaded Connection File” icon and then scroll down and click **CUT**
12. Double click **My Computer** to open the C-Drive
13. Locate the **Program File** folder and open it
14. Locate and open the **EndNote-X2** folder
15. Go to **EDIT** and **PASTE**. The downloaded Connection File icon will appear on the screen
16. Click on the downloaded Connection File icon and drag and drop the icon into the **Connections** folder. You have now added the downloaded Connection File into the folder.