

Data Management Tool for Research

EndNote XI

Brief Manual

By

Victoria T. Kok

Head, Veterinary Medical Library

Virginia Polytechnic Institute and State University

November 2007

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

CREATING AN ENDNOTE-X LIBRARY/DATABASE	3
IMPORTING SEARCH RETRIEVALS DIRECTLY INTO ENDNOTE LIBRARY	4
IMPORTING SEARCH RETRIEVALS THROUGH FILTERS	5
“EXPORTING” SEARCH RETRIEVALS FROM CABDIRECT.....	6
“EXPORTING” SEARCH RETRIEVALS FROM COMPENDEX (FROM ENGINEERING VILLAGE)	7
“EXPORTING” SEARCH RETRIEVALS FROM EBSCOHOST DATABASES (E.G. ERIC, PSYCINFO, ETC)	8
MANUALLY ENTERING BIBLIOGRAPHIC CITATIONS/REFERENCES	9
ENTERING IMAGES INTO ENDNOTE LIBRARY.....	10
ENTERING CHARTS, TABLES, DIAGRAMS, PDF-FILES, AND POWER POINTS, INTO ENDNOTE LIBRARY	11
IMPORTING A PDF INTO AN IMAGE FIELD IN A CITATION RECORD IN ENDNOTE LIBRARY	12
CREATING A SUBSET/GROUP FROM MAIN LIBRARY	13
INSERTING REFERENCES FROM ENDNOTE LIBRARY INTO MANUSCRIPT AND FORMATTING BIBLIOGRAPHY	14
WORD 2003	14
WORD 2007	15
INCORPORATING PHOTOGRAPHS, CHARTS, GRAPHS, TABLES, ETC. IN THE FIGURE FIELD INTO THE MANUSCRIPT	16
CREATING INDEPENDENT BIBLIOGRAPHY	17
COPY FORMATTED METHOD	17
DRAG-AND-DROP METHOD	17
CREATING “INDEPENDENT” BIBLIOGRAPHY WITH “HEADINGS”	18
DOWNLOADING IMPORT FILTERS FROM ENDNOTE HOMEPAGE	19
DOWNLOADING CONNECTION FILES FROM ENDNOTE HOMEPAGE.....	20
DOWNLOADING OUTPUT STYLES FROM ENDNOTE HOMEPAGE.....	21
SELECTING PLACEMENT STYLE FOR FIGURES AND CHARTS.	22
SELECTING SORTING BUTTONS IN ENDNOTE LIBRARY	23
ACTIVATING SPELL CHECK IN ENDNOTE-X.....	24
SELECTING SORTING BUTTONS IN ENDNOTE LIBRARY	25
E-MAILING A COPY OF ENDNOTE LIBRARY	26
DRAGGING AND DROPPING PDF FILE INTO ENDNOTE RECORD.....	26
HIDING EMPTY FIELDS IN THE ENDNOTE RECORDS	26
HOW TO CITE FULL JOURNAL TITLE IN TO THE BIBLIOGRAPHY.....	27
TO CHANGE THE IMPORTED TITLE TO CAPITALIZED	28

Creating an EndNote-X Library/Database

1. Open the EndNote program (*“Get Started with EndNote-XI” window opens up*)
2. Click **“Create a new EndNote Library”** radial-button.
3. Click **OK**
4. In the **“File-Name”** box, type in a name for your library/database, e.g. **REFERENCE** or **BIBLIOGRAPHY**.
5. Click **SAVE** button

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**
3. Go to **online Search** and click **New Search...** in the sub-menu
4. A list of search databases is displayed, 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” screen with the option to retrieve the citations appears.
8. Click **OK** and the citations will be retrieved from the database (*but not imported into your EndNote database yet --- if you want to edit your retrievals globally do it at this point.*)
9. Close the Search Window
10. To edit your citations, go to **REFERENCES** and scroll down to **Change and Move Fields** and the “Change & Move Fields” screen appears.
11. In the “**IN**” window, click the down-arrow and select the field you want to change, e.g. **Accession Number**. From the 4 options, choose the option you want (e.g. **Replace whole field** with) and click the radial button next to it.
12. In the text-window on the right of the screen enter the text you want to replace with, e.g. **No Reprint** and click **OK**.
13. You’ll be asked “Replace all text in the Accession Field with No Reprint”? Click **OK**.
14. Holding down the Command (CTRL) key, select the citations you want to import.
15. After having selected your citations, click on the arrow on the “**Copy Select to**” button, and select the EndNote Library you want to import the selected citations into.
16. The selected records will be imported into your EndNote Library.
17. Close the Library to save the imported records.

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 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**. (*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. (*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:
 - a. mark the needed citations;
 - b. Select **EndNote** to export to;
 - c. 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.

“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, Procite, 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 (Default)**” and then click **OK**
6. “**Select a Reference Library**” opens up.
7. Go to where your EndNote database is located (e.g. desktop)

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

1. After retrieving your search results from the database, mark the needed citations, and click **Add** to the right of the citation.
2. Click on **Folder has Item** and the **Folder Contents** window opens up
3. Click **EXPORT** and **Export Manager** window opens up
4. Check radial button to the left of **Direct Export to EndNote, Procite, or Reference Manager**
5. Click **SAVE**
6. **You have chosen to Open** window opens up.
7. Check the radial button to the left of **Open with (Web Export Helper)** and click **OK**
8. **Select a Reference Library** Window opens up.
9. Go to where your EndNote database is located (e.g. desktop)

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.
5. For **Authors, enter each author on a separate line.**

Entering Images into EndNote Library

1. Open your EndNote Library
2. Go to **REFERENCES** and select **New References**. *An empty window opens with the words “New Reference” displayed at the top.*
3. From the **Reference Type** window’s pull-down menu, select **Figure**.
4. Enter the Author names, title of the image, date, 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 Window” opens up
7. Click the **Choose File** button
8. A “Choose File” window opens up
9. Go to where you saved your image (e.g. desktop or a folder) and highlight it and click **OPEN**
10. A thumbnail of the image will appear in the **Figure Field**.
11. Go the “Caption” field and enter a caption
(this is optional)
12. **CLOSE** this image reference and it will save it 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*)

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

1. Open the EndNote Library
2. Go to **REFERENCES** and scroll down to **SEARCH REFERENCES**
3. Enter search terms and click **SEARCH**
4. Double click on the retrieved citation to open the citation
5. Scroll down and click on **FIGURE**
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.

Creating a Subset/Group from Main Library

There are times when you might want to create a separate subset of your main library for a manuscript, such as a paper, grant proposal, thesis or dissertation.

1. Open the EndNote Library
2. In the **Group** column on the left, highlight **All References**
3. Go up to **REFERENCE** and scroll down to **GROUPS** and **Create New Group**
4. Give the group a name (e.g. THESIS)
5. Holding down the **CTRL** key, click on the items in the main library that you want in the group/sub-library
6. **Drag and Drop** items in the group

Inserting References from EndNote Library into Manuscript and Formatting Bibliography

Word 2003

1. Open the EndNote Library that contain the references you wish to cite
2. Open the paper that you have saved on your Word Processing Program (e.g. Microsoft Word)
3. Position the cursor in the text in your Word-document where you would like to put the citation.
4. Go to **TOOLS** (*in your Word-document*) and scroll down to **EndNote-X** and **Find Citations**. (*An “EndNote Find Citations” window opens*)
5. Enter your search for the references in the **“FIND”** window, and click the **Search** button. (*Reference(s) matching your search will be retrieved*)
6. Click on the reference(s) you want to cite and then click the **INSERT** button on the lower right hand corner
7. Repeat steps 3 through 6 until all you have cited all your references.
8. To format the bibliography, go to **TOOLS** (*in your Word-document*) and scroll down to **EndNote-X** and **Format Bibliography**. (*An “EndNote Format Bibliography” window opens*)
9. Click the **BROWSE** button on the right side of the **With Output Style** window

Word 2007

1. Open the EndNote Library that contain the references you wish to cite
2. Open the paper that you have saved on your Word Processing Program (e.g. Microsoft Word)
3. Position the cursor in the text in your Word-document where you would like to put the citation.
4. Click on EndNote at the top of the screen
5. On the left of the screen, click the arrow of the **Insert Citation** tab
6. Scroll down to **Find Citation** . (*An “EndNote Find Citations” window opens*)
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 3 through 6 until all you have cited all your references.
10. To format the bibliography, click the arrow next to **Bibliography** at the top of the screen. (*An “EndNote Format Bibliography” window opens*)
11. Click the **BROWSE** button on the right side of the **With Output Style** window
12. Select the journal bibliographic style you want from the **With Output Style** window and then click the **OK** button and the citation style and bibliography will be formatted.

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.
2. Open the manuscript that you have saved on your Word Processing Program (e.g. Microsoft Word)
3. Position the cursor in the text in your Word-document where you want the image or figure to appear.
4. Go to **TOOLS** (*in your Word-document*) and scroll down to **EndNote-XI** and **Find Figure(s)** in the sub-menu. (*An “EndNote Find Figures” window opens*)
5. In the **Find** text box, enter the name you have assigned to the Chart or Table in your EndNote Library which you want to insert.
6. Click **SEARCH** (*EndNote displays a single matching reference. The file attachment icon appears in the lower part of the screen*)
7. 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*)
8. To resize the incorporated Chart or Table to fit on the page, **Click on a corner of the chart** and then hold down the **SHIFT-key, and drag the chart** to resize it proportionally.

Creating Independent Bibliography

COPY FORMATTED METHOD

1. Open your EndNote Library and holding down the CTRL key, select the references for the bibliography.
 2. Go to **EDIT** and **Output Style** submenu and select the style your want.
 3. Go to **EDIT** and choose **Copy Formatted** to copy the selected references.
 4. Open a blank document in your word processor, put the cursor where you would like the references to appear, then go to **EDIT** and **PASTE**.
 5. Go to **FILE** and **SAVE**.
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DRAG-AND-DROP METHOD

1. Open your EndNote Library and holding down the CTRL key, select the references for the bibliography.
2. Go to **EDIT** and **Output Style** submenu and select the style your want.
3. Open a blank document in your word processor.
4. Hold down the **CTRL key** and drag the references from the EndNote Library and drop them directly onto the open word processing document.

Creating “Independent” Bibliography with “Headings”

1. Open the EndNote Library
2. Hold down the CTRL-key and select the references you wish to include in the Subject Bibliography
3. From the **TOOLS** menu select **Subject Bibliography** to display a list of EndNote fields
4. Select the field(s) whose contents you wish to use as Subject Headings, e.g. Keywords, or Authors, or year of publication, etc.
5. At the bottom of this window, select the check boxes: *“List Each Author separately”* and *“In other fields, list each entry that is separated by slash, carriage return, or line feed”*
6. Click **O.K.** to display terms found in the fields of the citations you selected, e.g. names of authors in Author-field (if you have selected Authors for your headings) or subject headings in Keyword-field (if you have selected Keywords for your headings).
7. Select the terms you wish to include as Subject Headings (e.g. Drug Interactions, Drug Therapy, etc.)
8. Click **O.K.** and the Subject Bibliography list appears.
9. To select the style for your bibliography click on the arrow of the **Output Style** window at the top of the screen, select the style and click **SAVE**
10. To **delete a subject heading** from your bibliography click on the **TERMS window** to display a list of subject headings. **Select** the subject headings you wish to keep and click **O.K.**
11. To insert a Title for the subject bibliography, click on the **Layout button** and in the **Reference List Title window** type the Title (e.g. Biomedical Literature), and click **O.K.**

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-XI** folder
14. Go to **EDIT** and **PASTE**. The downloaded filter icon will appear on the screen.

Downloading Connection Files 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 **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-XI** folder
15. Go to **EDIT** and **PASTE**. The downloaded Connection File icon will appear on the screen

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-XI** folder.
15. Go to **EDIT** and **PASTE**. The downloaded journal output style icon will appear on the screen.

Selecting Placement Style for Figures and Charts.

1. Open the EndNote Library
 2. Click on **EDIT**
 3. Scroll down to **Output Styles**
 4. Click on the journal you are going to publish in, e.g. “Cancer Research”
 5. Click on **EDIT** again and scroll down to **Output Styles**, and scroll up to “**Edit Cancer Research**”
 6. Window for the journal, e.g. “Cancer Research” opens.
 7. In the left hand column, scroll down to **Figures & Tables**
 8. Select **Figures**
 9. In the right hand column, under **Figure Placement**, select either “*Insert figures in text near the reference to the figures*” or “*Insert figures as list at the end of the document*” by checking the radial button to the left of the selection.
 10. Under **Captions** select either “*Place caption above figure*” or “*Place caption below the figure*”
 11. In addition to the above choice, there’s an option for “*Place label and caption on separate lines*”
 12. Close the Window, and click YES to save the changes.
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Selecting SORTING Buttons in EndNote Library

1. Open an EndNote Library
2. Go to **EDIT**
3. Scroll down to **PREFERENCES**
4. In the Left hand column, select **Display Fields**
5. **“Fields to display in the library”** appears.
6. For each column, click on the arrow to the right of the window and select the field you want displayed in your EndNote library.

Activating Spell Check in EndNote-X

1. Open EndNote Library
2. Go to **EDIT** and scroll down to **PREFERENCES**
3. On the “**EndNote Preferences**” screen, on the left hand column, scroll down and click **Spell Check**
4. In the window on the right of the screen, click the **Dictionaries** button
5. In the “**Spelling Dictionaries**” screen, click the **Add File** button on the right
6. In the “**Add Dictionary File**” window, click on **ssceam.tlx** (the 3rd item in the left column)

Selecting SORTING Buttons in EndNote Library

1. Open an EndNote Library
2. Go to **EDIT**
3. Scroll down to **PREFERENCES**
4. In the Left hand column, select **Display Fields**
5. **“Fields to display in the library”** appears.
6. For each column, click on the arrow to the right of the window and select the field you want displayed in your EndNote library.

E-Mailing a Copy of EndNote Library

1. Open EndNote Library
 2. Go to **FILE**
 3. Scroll down to **SEND TO** and **Compress Library ...**
 4. This saved compressed copy of the library will have an extension **.enlx**
 5. **SAVE** (to desktop or folder)
 6. This saved copy of your EndNote Library can then be sent as an attached document to your e-mail.
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Dragging and Dropping PDF file into EndNote Record

1. Open EndNote Library
 2. Click on the bibliographic record/citation you want to incorporate the PDF file
 3. Click on the PDF file, **drag and drop** it into the highlighted record/citation
 4. You have now established a PDF link to your PDF folder
-

Hiding Empty Fields in the EndNote Records

1. Open EndNote Library
2. Double click a record/citation to open it
3. Click **Hide Empty Fields** at the top right hand corner of the screen

How to cite Full Journal Title in to the bibliography

1. Open the EndNote Library, go to **TOOLS** and scroll down to **Open Term List** and select **Journal Terms List**.
2. A **Term List** window opens up.
3. Highlight the first journal, and holding down **[Ctrl]** button, Press **A** to highlight the whole list
4. Press **Delete Term** button on the right. (*if you have a long list you might have to repeat this several times*). Now you have a clean slate to start with
5. Next Click on the **List** tab at the top, select **Journals** and click on the **Import List** button.
6. Go to **My Computer** and open the **C-disk**
7. Go to the **Program folder** and open up the **EndNote-XI folder** and select the **Term List folder**
8. **Term List** window opens up
9. Double click on the list, e.g. medical or humanities or economics, etc. you wish to import, and the List is imported. (*You can then select other lists, Chemistry, Biosciences, etc. to import as well*)
10. Close the **Term List**
11. Next go to **EDIT** then **Output Styles** and scroll to the top to **Open Style Manager**
12. In the list, **highlight** the journal you want to publish in and click the **EDIT** button on the lower right hand area
13. The journal window opens up. Here, click on **Journal Name**
14. Click on the radial button to the left of **Use Full Journal Name**

To Change The Imported Title To Capitalized

1. Open an EndNote Library and click on **EDIT**
2. Scroll down to **IMPORT FILTER** and **OPEN FILTER MANAGER**
3. An “EndNote Import Filters” window opens up
4. Scroll down to **EndNote Import (Generic)** and highlight it
5. In the “EndNote Import Filters” window, click on the **EDIT** button.
6. An “EndNote Import” window opens up. Click on **FIELD EDITING** on the left hand column
7. Select **TITLE** in the “**Field Editing for**” window and set the “**change UPPERCASE text to:**” to **HEADLINE**