Guide to EndNote for Macintosh and Windows

EndNote is a bibliographic management software package. It enables you to store references and easily place them in papers created in a variety of word processing packages. It can also be useful for keeping track of reprint files. MUSC has a site license for EndNote: check out a CD from 4th floor Library desk to install on your computer or download from OCIO-IS http://www.musc.edu/infoservices/software/. BE SURE to install updates and enter the URLs for Find Fulltext (www.library.musc.edu/page.php?id=1640)

Creating a New Library in EndNote & Entering References

A library is a collection of references that you compile in EndNote. EndNote recommends that you keep all your references together in one main library; doing so will facilitate retrieval.
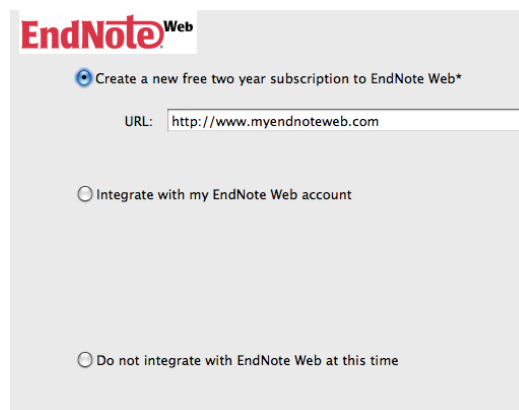
Open the EndNote software program:

The opening screen of the EndNote program presents a choice of creating a library on EndNote Web. If you wish to do so, follow the directions. You can use the Web Library on computers without the EndNote software and exchange references between the Web and the Desktop Libraries.

Always **save a copy** of your Library as back up on your computer! File, Send to, Compressed Library to save all parts. (Homeroom, travel drive, anywhere, but save a copy!)

The following instructions are for the desktop version.

EndNote Web
- ● Create a new free two year subscription to EndNote Web*
  - URL: http://www.myendnoteweb.com
- ○ Integrate with my EndNote Web account
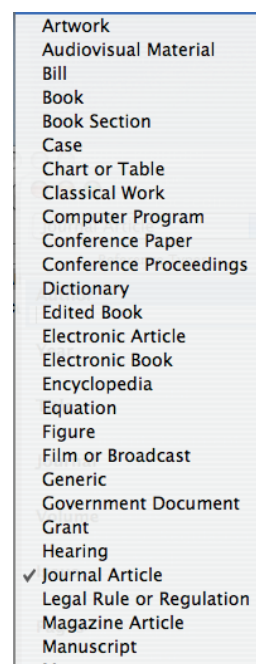- ○ Do not integrate with EndNote Web at this time

To create a New (empty) Library choose File/New on the top menu bar. Give it a name. References may be entered manually in pre-defined templates, e.g. journal article, book, book section, web page, personal communication, computer program, et al. (You can also create a template.)

Select **References** from the EndNote menu bar. Then select **New Reference.** (On Macs, choose the **New Reference** icon on the Library Toolbar.)

New Reference

Under **Reference Type**, **Choose** the template you wish. A blank new reference screen will appear.(See page 2)

- Artwork
- Audiovisual Material
- Bill
- Book
- Book Section
- Case
- Chart or Table
- Classical Work
- Computer Program
- Conference Paper
- Conference Proceedings
- Dictionary
- Edited Book
- Electronic Article
- Electronic Book
- Encyclopedia
- Equation
- Figure
- Film or Broadcast
- Generic
- Government Document
- Grant
- Hearing
- ✓ Journal Article
- Legal Rule or Regulation
- Magazine Article
- Manuscript
- Map

Each part of a record; author, title, journal etc., is known as a field. Use the **tab** key to move between fields. Use the **return** key to go to new line within a field.

Author Field
●Enter 1 author per line. If the name is too long for a single line let it wrap.
●Enter as *Doe, J. J.*
   CONSISTENCY IS IMPORTANT!
●Groups or corporate names should be entered followed by a comma. e.g. OBGYN Study Group,
●Names which include family designations such as Jr. should be entered in the following format: *Last name Jr., first initial. second initial.*
●If using initials be sure to follow with a period.
●When a style is selected to format a paper, EndNote will add *et al* or *and others* as is appropriate to the style. Don't worry about the display on the screen.

Titles of the article or chapter
●**Do not place a period or any other punctuation at the end of a title.**
●**Do not press the return key** when typing titles, let long titles wrap.
Year
●Enter year as 4 digits: *1998* When appropriate enter *in press, submitted,* etc.
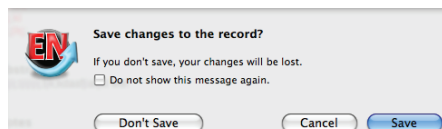**Pages**
●Enter as: *1442-1449* (all digits)

Journal
●Enter the full title in the **Journal** field.
●Enter an abbreviated title in the **Alternate Journal** field. If you know you have to use abbreviated journal titles in the manuscript, be sure to import these abbreviations before entering any references to your library from http://www.library.uq.edu.au/faqs/endnote/journal_terms.html (Choose any of the lists - Medicine (NLM), Biosciences (Biol. Abstracts) or Chemistry (ACS), then use the browser '**save page as**' command. Save as a text file.) In EndNote, open **Tools, Open Term Lists, Journals Term List.** Change to the **Lists** Tab and import the saved list.

It may ask:
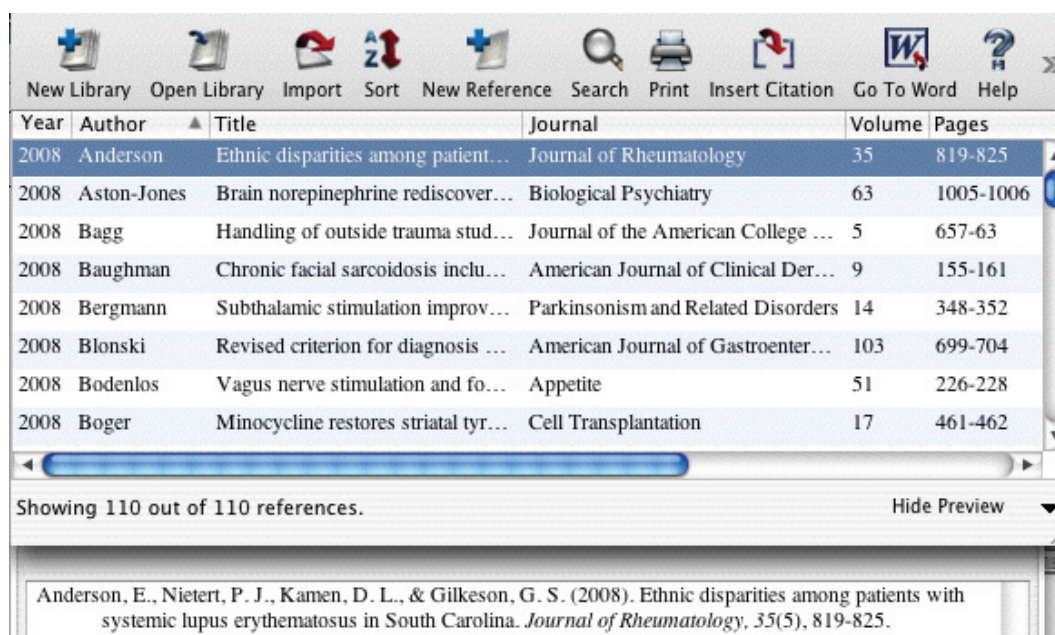**Save** changes to the record before closing? Click **Save**.

Blank new reference form.

Completed new reference.

New references can be entered manually into an existing Library in the same way they are entered into a new Library. Records can also be downloaded from searches in bibliographic databases such as PubMed and imported into a new or existing End-Note Library. (See page 4 for instructions.) Your EndNote Library size is only limited by the amount of memory on your computer! If you have several grants, you can enter the grant number in the Notes field in order to search/sort references when preparing manuscripts or grants later on.   Here is an example of an EndNote Library:

	New Library	Open Library	Import	Sort	New Reference	Search	Print	Insert Citation	Go To Word	Help

Year	Author	Title	Journal	Volume	Pages
2008	Anderson	Ethnic disparities among patient...	Journal of Rheumatology	35	819-825
2008	Aston-Jones	Brain norepinephrine rediscover...	Biological Psychiatry	63	1005-1006
2008	Bagg	Handling of outside trauma stud...	Journal of the American College ...	5	657-63
2008	Baughman	Chronic facial sarcoidosis inclu...	American Journal of Clinical Der...	9	155-161
2008	Bergmann	Subthalamic stimulation improv...	Parkinsonism and Related Disorders	14	348-352
2008	Blonski	Revised criterion for diagnosis ...	American Journal of Gastroenter...	103	699-704
2008	Bodenlos	Vagus nerve stimulation and fo...	Appetite	51	226-228
2008	Boger	Minocycline restores striatal tyr...	Cell Transplantation	17	461-462

Showing 110 out of 110 references.   Hide Preview

Anderson, E., Nietert, P. J., Kamen, D. L., & Gilkeson, G. S. (2008). Ethnic disparities among patients with systemic lupus erythematosus in South Carolina. *Journal of Rheumatology, 35*(5), 819-825.

If you have a pdf of an article on your computer, you can embed this in the EndNote Library. To attach a pdf to a reference, have the individual reference open, highlight the File Attachment field, then go up to the pulldown menu called References and choose File Attachments and select Attach File.
Navigate to the pdf on your computer and choose it. It will now be included in this EndNote Library reference. In EndNote X4/X5+, you can set up preferences to Find Fulltext. See "EndNote Updates and Installation Tips" at
http://www.library.musc.edu/page.php?id=1640.
To use this EndNote Library on another computer or to share with a colleague via e-mail, you must compress the Library before sending. To do this, have the Library open and then choose (from the pulldown menu) File, Compressed Library. This command puts all parts (all fields and pdfs) of a Library into one file and allows for easy moving. This would be an excellent way to save a copy as back up.
It can be renamed and will have the extension .enlx

There are many advanced ways to modify or create a new reference type (template). Contact a reference librarian for assistance with any of these.

Downloading and Importing Citations into EndNote
Using Databases such as PubMed or Ovid MEDLINE

Conduct a search using PubMed.

Select citations for saving by marking the boxes.

Use the Send to box to choose **File**.
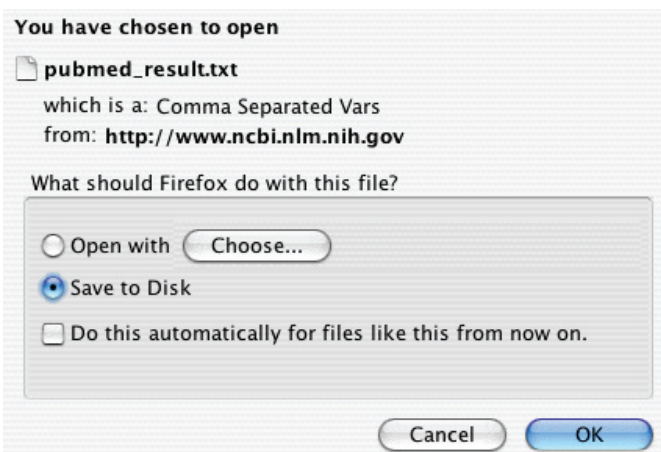

Use the **Send to** box to choose **File**.

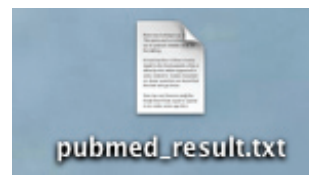In PubMed, change Format to MEDLINE and click on Create File.

Format choice (Display) is very important. To successfully import citations into EndNote from **PubMed**, change to the "**MEDLINE**" display.

In **Ovid** you must choose **Reprint/Medlars** as your format choice after choosing the Export command on the Results page.

page 4

On many computers, you will be prompted to open or save the file. Choose Save.

You have chosen to open

📄 **pubmed_result.txt**

which is a: Comma Separated Vars
from: **http://www.ncbi.nlm.nih.gov**

What should Firefox do with this file?

○ Open with (Choose...)
◉ Save to Disk
☐ Do this automatically for files like this from now on.

(Cancel) (OK)

In PubMed, the file will be named **pubmed_result.txt**. In Ovid, the file will be called **cites.txt**.
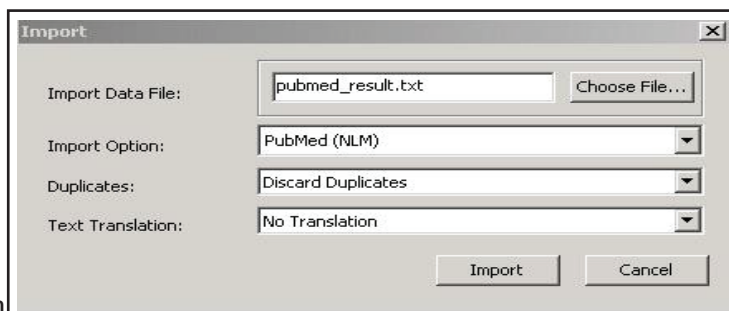
pubmed_result.txt

This file will be downloaded to wherever you have set your preferences. Often this is the desktop or "My Documents" folder. You are now ready to open EndNote and import these references into an EndNote Library.

Open the **EndNote Library** into which you want to move the downloaded citations. Click on **File**, then **Import** and then click on **Choose File** to select the correct downloaded citation file. (In Recent Items or My Documents or Desktop)
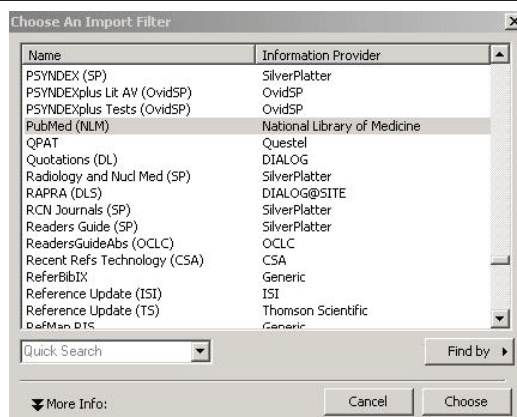
At the **Import Option** prompt, select the appropriate import filter. The filter matches the database you did the search in. For example, if you did a search in PubMed, the filter is PubMed (NLM).

Ovid can Direct Export after choosing Export (see page 6).

Import

Import Data File: pubmed_result.txt   Choose File...
Import Option: PubMed (NLM)
Duplicates: Discard Duplicates
Text Translation: No Translation

Import   Cancel

EndNote includes many import options. If you do not see the appropriate filter in the short list, choose **Other Filters** from the menu to find the filter that matches the source of the data you want to import.

After selecting the appropriate filter, decide what you wish to do with duplicates: Import All or Discard Duplicates or Import into Duplicates Library. Do not change the Text Translation box.

Choose An Import Filter

Name	Information Provider
PSYNDEX (SP)	SilverPlatter
PSYNDEXplus Lit AV (OvidSP)	OvidSP
PSYNDEXplus Tests (OvidSP)	OvidSP
PubMed (NLM)	National Library of Medicine
QPAT	Questel
Quotations (DL)	DIALOG
Radiology and Nucl Med (SP)	SilverPlatter
RAPRA (DLS)	DIALOG@SITE
RCN Journals (SP)	SilverPlatter
Readers Guide (SP)	SilverPlatter
ReadersGuideAbs (OCLC)	OCLC
Recent Refs Technology (CSA)	CSA
ReferBibIX	Generic
Reference Update (ISI)	ISI
Reference Update (TS)	Thomson Scientific
RefMan RIS	Generic

Quick Search   Find by ▶

▼ More Info: Cancel   Choose

As databases change, you will need to update the import filters in your EndNote program. Go to http://www.endnote.com/support/ensupport.asp to download the newest filters. Unzip and place into the Filters folder in your EndNote program folder (after deleting the old ones). When a filter does not work any more (files and citations do not import fully or at all), that is the clue that newer filters are needed.

Direct Export of Citations into EndNote
Using Databases such as EBSCOhost CINAHL or Ovid MEDLINE

Conduct a search in CINAHL Plus with Full Text.
Select citations for saving by clicking on "**Add To Folder**".

Once you have added all the records you want to the folder, click on "Go to Folder" in the right frame.

1. Sibling advocacy. 📑
(includes abstract); Meyer TM;
0002-936X PMID: 19112277 C
📧 Add to folder

Go to: Folder View

🔲 Find it @ MUSC Library

You will see your saved list:

☑ Select / deselect all   **Delete Items**

Click on **Select/deselect all**

Next Click on the **Export** icon

☐ 1. Nurse educators' and nursing students'
(includes abstract); Numminen O; van der A
0969-7330 PMID: 19103692 CINAHL AN: 2(
📄 PDF Full Text

🖨 Print

✉ E-mail

💾 Save as File

➡ Export

☐ 2. Nursing ethics and health care policy: I
University, New Haven, CT, USA; 17--1'
Gastmans C; Nursing Ethics, 2009 Jan; 16 (
📄 PDF Full Text

The next screen will let you export these citations directly into your EndNote Library.
Be sure to **Uncheck** the **Remove these items from folder after saving** box, just in case it fails to export properly!

Save E-mail
Number of items to be saved: 10
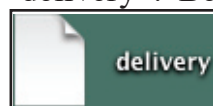
☐ Remove these items from folder after saving

Save

Save citations to a file formatted for:
◉ Direct Export to EndNote, ProCite, or Reference Manager
○ Direct Export to EndNote Web
○ Generic bibliographic management software

Click on **Save**. On some computers, you can click on **Open with** and then **Choose** to navigate to the EndNote software. Click **OK** and you will be prompted for the name of the EndNote Library you wish to export the citations into. On other computers, the file will be saved and you will have to import it into EndNote as in PubMed (see page 5.) For CINAHL

You have chosen to open

delivery

which is a: application/x-research-info-systems
from: **http://web.ebscohost.com**

What should Firefox do with this file?

◉ Open with   Choose...
○ Save File
☐ Do this automatically for files like this from now on.

Cancel   OK

and PsycInfo, the saved file will be called "delivery". Be sure to choose the

📄 delivery   "Tab Delimited" Import Option filter.

The next step is to incorporate your references in your manuscript.
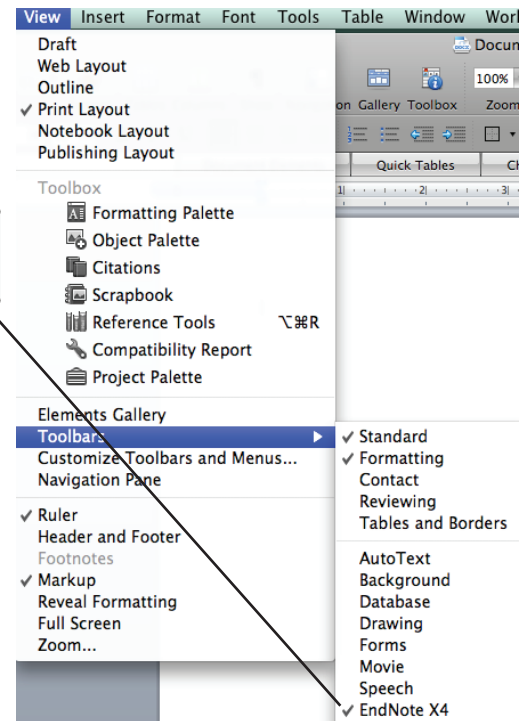
page 6

Microsoft Word with EndNote Add-ins

Open your EndNote Library.

Open your document in Microsoft Word. Place the cursor where you want to insert a reference. If the EndNote Toolbar does not appear, go to the MS Word pulldown command **View - Toolbars** and put a check mark beside **"EndNote"**.

If it isn't there, go to www.Endnote.com for assistance.
The EndNote Toolbar has all the commands you will need for adding references to your document.The Toolbar for Windows will look different but have the same icons.!

To go from Word to the EndNote Library, click on the red **EN**.

Click back on your Microsoft Word document and choose **Insert Citation** from the Toolbar. Or click on Insert Citation within the Library:

The reference will be placed at the cursor point. More than one reference can be highlighted and inserted at any point.There is a **search icon** on the EndNote Toolbar if you wish to search for a reference. The insert command will appear on this search page in **EndNote (at the bottom of the search box)**.
When finished creating your paper and inserting references, choose **Format Bibliography** from the Toolbar**. In Windows,** this command is **Update Citations and Bibliography.**

A box will pop up for you to make a bibliographic style selection; select **Browse** if your style isn't listed (or choose a listed style) and click on **OK.** EndNote provides several thousand styles with which to format your paper. Styles can be the journal you are submitting to or standards such as APA 6th, Vancouver (AMA), Chicago, or CBE. To change styles or create a personalized list of styles, go to the **Edit - Output Styles - Open Style Manager** menu in EndNote. Your paper will be formatted with the newly created reference list appended. Save. A new style can easily be created - contact an MUSC Reference Librarian for instructions.)
And always save a backup copy!
To get the NLM list of journal abbreviations, go to http://www.library.uq.edu.au/endnote/journal_terms.html and download the Medical term list (see pg. 2).