



Getting Started with EndNote X7 for PC

What is EndNote?

EndNote is a software program that helps you organize references and create properly formatted bibliographies. References can be imported from online databases or can be typed in by hand. EndNote works with Microsoft Word to produce bibliographies and embedded references in hundreds of available styles. EndNote also makes it easy to change the style of your references.

For more information, see <http://www.lib.uiowa.edu/hardin/endnote.html>

Preparing your EndNote Library

1. Open EndNote. If the Get Started with EndNote screen appears, select **Create a new EndNote Library** and click **OK**. Otherwise, from the **File** menu, select **New...**
2. Give your new library a name and save it in a location that makes sense to you.

Installing EndNote's List of Medical Journal Titles and Abbreviations

Installing this list allows EndNote to move back and forth between full journal titles and abbreviations.

1. Under EndNote's **Tools** menu, select **Define Term Lists**, then click on **Journals**.
2. Click the **Import List** button. Navigate to the folder where EndNote is installed (usually C:\Program Files\EndNote) and open the **Term Lists** folder.
3. Double click on **medical.txt**. After the terms are installed, click **OK**.

Exploring the EndNote Library

The screenshot shows the EndNote X6 interface. On the left, the 'My Library' pane shows a 'Groups' menu with options like 'Ireflist', 'Ankyrin', 'FCP1CB', 'Handwashing', 'New Group', 'Scopus', and 'Weddings'. A callout box points to this menu with the text: 'Groups help organize your references by topic, source, or project. Create them with the **Groups** menu.'

The main pane displays a list of references with columns for Author, Year, and Title. A callout box points to the selected reference with the text: 'The currently-selected reference, formatted in the currently-selected style'. The selected reference is: 'Hund, T. J.; Mohler, P. J.; 2008; Ankyrin-based targeting pathway regulates human sinoatrial node automaticity. Channels (Austin), 2008 Nov-Dec; 2(6):404-6. PubMed PMID: 19098452; Epub 2008/12/23; eng.'


On the right, the 'Reference' pane shows a preview of the selected reference. A callout box points to this pane with the text: 'All references in the currently-selected group.'

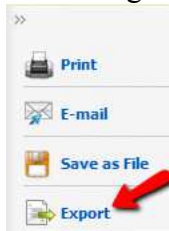
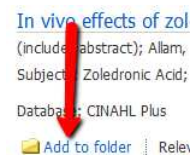


Adding References

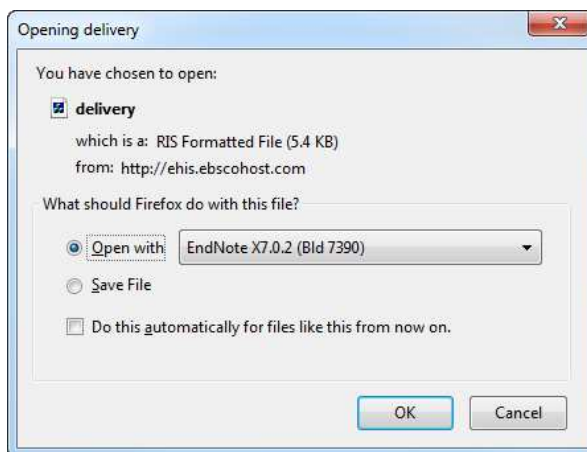
Importing Citations Directly from Databases (ex. EBSCO)

Most online databases offer an Export feature that allows you to transfer citations directly into an EndNote library. The steps may vary slightly between databases. The following steps work in EBSCO databases (such as CINAHL and Academic Search Elite).

1. Run your search as usual. From the list of results, select the citations you want to save by clicking the “Add to Folder” link.
2. Click the **folder** icon  near the top right hand side of the screen.
3. Select the items in the folder.
4. Near the right hand side of the screen, select the “Export” option.



5. Make sure that “Direct Export to EndNote, ProCite, CITAVI, or Reference Manager” is selected and then, check the “Save” button on the left side of the screen.
6. Your browser may prompt you to pick a program to open the file with. Select EndNote from the available options.



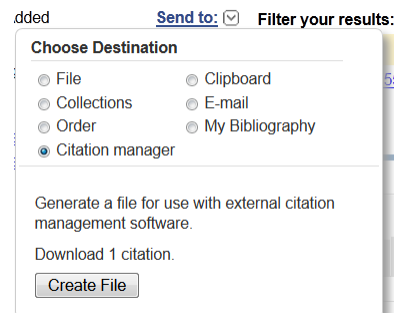
7. The imported citations will appear in your EndNote Library in a special group called **Imported References**. You may want to move them to a group at this time. NOTE: The export feature may have different names in different databases. Look for options like “direct export,” Send to EndNote,” or “Export to Reference Software.”



Importing Citations using PubMed’s Citation Manager (works with up to 200 citations)

Utilizing the “Citation Manager” option will prompt EndNote to directly import citations when you follow these instructions.

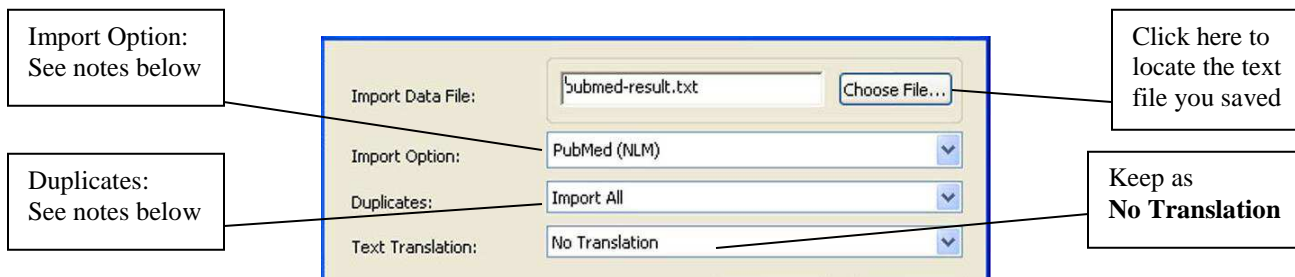
1. Check the boxes to the left of the citations you wish to move into EndNote. \
2. Click the **Send to** link near the top right of the screen.
3. Select **Citation Manager**
4. Change the drop box to **200** (this way you ensure all your citations move over) and then click **Create File**.
5. When prompted, select **Open File**.
6. You may see a screen that says **Windows Can’t Open this File**. Don’t worry. Check the box that says **Select a program from a list of installed programs** and then select **EndNote** (NOTE: You will see an option to tell your computer to always use EndNote to open these types of files so it’s easier to do in the future).
7. You will be prompted to **Choose an Import Filter**. Select **PubMed (NLM)** from the list and then click **Choose**. Your citations will import into EndNote at this time.



Importing Citations using an Import Filter (ex. PubMed when you have > 200 citations)

PubMed is one of the few major databases that cannot export references directly to EndNote. Instead, you must save your citations as a text file and then import them into EndNote.

1. Check the boxes to the left of the citations you wish to move into EndNote.
2. Click the **Send to** link near the top right of the screen.
3. Select **File**.
4. Under **Format** select **MEDLINE**.
5. Click the **Create File** button.
6. Now, save the file to your desktop or another easy to remember location.
7. Open EndNote and under the **File** menu, select **Import**. You’ll see a box like this:



Import Data File: Click **Choose File...** to locate the text file you saved from PubMed.

Import Option: Click on the down arrow next to **Import Option** to see filters that have been used before. Select the database from which you downloaded your citations. If the database you need isn’t there, click **Other Filters** and select the desired database.

Duplicates: This lets EndNote know what to do if it finds identical citations. If you choose





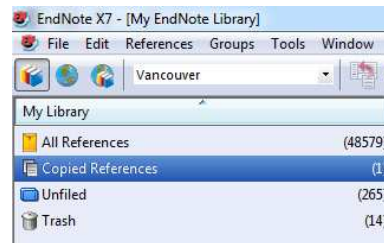
Discard Duplicates, it will ignore any citations that already exist in the library. If you choose **Import All**, see Removing Duplicates below to locate and remove duplicates later.

8. Click **Import**. You'll probably see EndNote counting citations. *Note:* If your file is downloaded as one big citation, they probably weren't saved in the correct format: download them again, being sure to save them in the MEDLINE format. If it still doesn't import properly, you may need to update the filter.

Importing Citations via EndNote (Only recommended for known citations)

If you have a list of citations from PubMed, you can use EndNote to find them and add them to your library. It is not a good idea to search for articles on a given topic with EndNote, though.

1. VERY IMPORTANT: Click on the  globe (aka **Online Search Mode**). If you skip this step, every citation your search pulls up will automatically be added to your library whether you want them there or not.
2. Select **PubMed** from the left hand side of the screen.
3. Enter the **Author, Year**, and change the last drop box to **Journal** before entering the name of the journal you need (You can also change the drop box to **PMID** if you have one).
4. Click the **Search** button.
5. When you find the citation you want, highlight it by left clicking and then right click the citation and select **Copy References to → [Name of your library]**
6. From the top left of your screen, select  (aka **Integrated Local Library & Online Search Mode**). You will be asked if you want discard all online references. Click **OK**.
7. The references you have added will show up under the **Copied References** in you left-hand menu bar.



Adding References Manually

Occasionally you will want to add a reference to your Library by typing it in, rather than by downloading. Here are some tips:

1. Open your database and select **References → New Reference**
2. Select the appropriate **Reference Type** (ex. Journal article, book section, book, etc.) EndNote will mark fields needed for that type (editors' names, chapter authors' names, etc.).
3. Fill in the appropriate fields. Author and page number fields should be entered as follows.
 - Authors must be entered one per line, so press **Enter** after each author's name
 - Einstein, Howard G.



- de Gaulle, Charles
- Einstein, H G *or* Einstein, H.G. (*not* Einstein, HG)
- Einstein, Albert, Jr.
- American College of Physicians, (notice the comma at the end)
- **Page numbers** can be entered in any of the following forms, with commas between non-consecutive ranges.
 - 1492-1497
 - 1492-7
 - 124-127, 130, 191-194

Removing Duplicates

- Select **Find Duplicates** from the **References** menu. EndNote will scan the Library, and will then show duplicate references it detects. The duplicate citations will be shown side by side and you can select which one you would like to keep.
- You can change the fields EndNote uses to identify duplicates by choosing **Preferences...** from the **Edit** menu. Select **Duplicates** from the left frame. You can then select which fields EndNote will compare, and whether they need to match exactly or if EndNote should ignore spaces and punctuation. By default, EndNote compares the author, year, article title, and reference type fields.

NOTE: The same article downloaded from different databases may have slightly different authors, titles, and even journal names (some databases do not include all authors for example, or may include a longer subtitle); EndNote will not usually recognize these as duplicates.

Linking PDFs or Other Files to EndNote References

You can attach a PDF or other file to a reference in EndNote. The file can be on your own computer or on the Internet.

1. Open the reference to which you wish to link.
2. To link to a file on your computer, select a citation, go to the **References** menu and choose **File Attachments** and then **Attach File...** Locate the file and click **Open**.
3. To link to a file on the Internet, simply type (or paste) the **URL** into the reference's URL field.

NOTE: you may also be able to drag and drop files saved on your computer to a reference

Set up EndNote to Find Full-Text

EndNote can attempt to locate the full text (PDF or HTML) of articles in your library. Full text availability is limited to journals to which the UI Libraries subscribe electronically and for which full text is available.

To set up Find Full Text:



1. From the Edit menu, select Preferences.
2. Click on Find Full Text.
3. In the Open URL Path box, enter:
http://uilink.lib.uiowa.edu/view/uresolver/01IOWA_INST/openurl
4. If you are using EndNote from off-campus, you will need to enter
<https://proxy.lib.uiowa.edu/login> beside the box labeled **Authentication URL**.

NOTE; It is advised that you do **not** select the box “automatically invoke find full text on newly imported references” that appears at the bottom of the box. Attaching full text for all references is often unnecessary and will interfere with use of library during the process.

To find full-text:

1. Select the desired references in your EndNote Library.
2. Right click and then select **Find Full Text** from the pop-up menu.
3. Click OK on the copyright notice. EndNote will begin looking for full-text and will track its progress in the blue side panel.
4. When EndNote finds a PDF, a paperclip appears in the attachment column, and the PDF appears in the File Attachments field of the reference. Click on the PDF to open the article. PDFs are stored in the Endnote library's .data file, in a folder called PDF.
5. If EndNote can only find an HTML version of the article, a link to that version appears in the reference's URL field.

Enable UI Link

By enabling UI Link in EndNote, you can easily get to the full-text of an article from the EndNote record

1. From the **Edit** menu, select **Preferences**
2. Click on **URLS and Links**
3. Paste the following into the box labeled **ISI Base URL**:
http://uilink.lib.uiowa.edu/view/uresolver/01IOWA_INST/openurl
4. You can now click **OK**.
5. To use UI Link, click on a record, then go to the **References** menu and select **URL** and then **OpenURL Link**. Use UI Link to find full text, or to launch an interlibrary loan request, if the item is not available electronically.

Creating Groups

Groups provide a nice way to organize your citations and group together citations on a similar topic or citations for a certain project. Select **Create Group** from the **Groups** menu

1. Name the group
2. Drag and drop citations from into your new group. The same citation can be in multiple groups

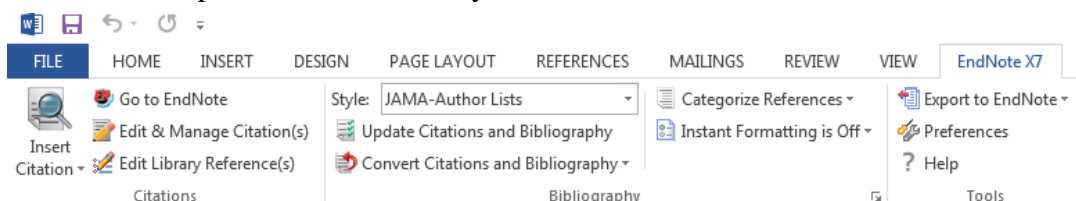


To Create a Smart Group:

1. Select **Create Smart Group** from the **Groups** menu
2. Set the criteria for the Smart Group. EndNote will automatically add any citations to the Smart Group that meet the criteria that you set here. Try entering a specific author, year, journal, or keyword.

Producing a Bibliography

1. When EndNote is installed, it will also create an EndNote ribbon in Microsoft Word 2007 and later (in older versions of Word, it will create a toolbar instead). You can use this tool to add, remove, or rearrange citations within the Word document. EndNote will renumber or re-alphabetize as necessary.



2. At the top of the EndNote ribbon, you'll see a drop-down menu showing the style currently being used. Use this box to select the appropriate **Style**. Click on **Select Another Style...** to see all available styles.
3. Place your cursor where you want to enter your first reference, and click **Insert Citation** in the EndNote X7 menu. An **EndNote X7 Find & Insert My References** window will open. Enter keywords and click **Search** to search through your whole library. A list of matching references will appear. Select the one(s) you want to use and click **Insert**.
4. EndNote will embed the citation in the desired format, and append the bibliographic reference at the end of the paper. This may not be instantaneous; if you have many references, you will probably first see a generic citation that looks like this: {Albretsen, 1998 #11} for a short while before the formatted citation appears. If these generic citations don't go away, or if the wrong output style is being used, see **Changing the Format of a Bibliography** in the next section.
5. If you need to edit a citation (such as to remove the author or year from the in-text citation or remove one citation from a group of several), click on the citation, then click on **Edit Citation(s)** from the Endnote toolbar.
6. When you are all done, save your document.
7. Remember to proofread your bibliography! There may be small formatting errors or even typos that you should correct manually. If you find major formatting errors, make sure you are using the correct output style.

Note: It is possible to create free standing bibliography or format individual references to copy/paste into other programs. To do this, choose appropriate style in the drop down box at the



top left side of library window. Then, select desired references from library-> right click-> select **Copy Formatted**, and paste them into desired location.

Removing Field Codes

If you are submitting the document electronically—especially to a publisher whose Instructions to Authors say not to use EndNote—you will need to remove the field codes.

1. Click **Convert Citations and Bibliography** from the **EndNote** ribbon's **Bibliography** panel.
2. Then select **Convert to Plain Text**. Word will create a new copy of your document without the field codes. NOTE: Be sure to keep the original version of your document with the field codes in case you need to make any changes. EndNote *cannot* work with a document that has been converted to plain text.

Changing the Format of a Bibliography

1. In the **EndNote** ribbon's **Bibliography** panel, select the output **style** you want to use. If your style isn't on the dropdown, pick **Select Another Style...** to see the full list. **Select** the appropriate style and click **OK**. It may take a few seconds for the bibliography to be reformatted.
2. If it doesn't reformat automatically, click **Update Citations and Bibliography** from the **EndNote** ribbon's **Bibliography** panel.

Moving an EndNote Library to Another Computer

If you need to move your EndNote Library to another computer, or want to share it with another EndNote user, you will need to move two separate parts, which will be located in the same folder. These two parts are your EndNote Library, which will have the extension .enl, and a folder with the same name as your EndNote Library, but with a .Data extension. In EndNote X7, these two files can be compressed into a single file, which makes moving the file or attaching it to an email message simple.

1. Go to EndNote's **File** menu, select **Compressed File** then **Create** or **Create and Email**. The library and data file will be compressed into a single file with a .enlx extension. To open this file, simply double-click it (note: the recipient must have EndNote version 9 or later to open the file).

Setting up Sync to EndNote Basic (Online)

Syncing allows you to access all of your references stored in your desktop library from the web, and is available for Endnote X6 and later. It is only possible to sync one desktop library with one online library at a time.

Directions:



1. Create an EndNote Basic account from the sign up link on this page:
<http://guides.lib.uiowa.edu/citingsources/HardinEndNoteBasic>
2. If you already have an online account, remove duplicates, place all in groups, and empty the trash.
3. Open the desktop library that you would like to sync. Remove duplicates, file references in groups, and empty the trash.
4. Open the desktop library and access file menu->preferences-sync (you can also alter preferences regarding initiating sync and frequency of sync here)
5. Enter in credentials for the EndNote online account
6. Select blue sync icon in middle of the desktop library toolbar and allow some time for sync to occur. Find the sync status button in upper left pane.
7. All references, groups, and associated files (including PDFs) should be available in the online account after sync is complete.
8. References sync in both directions. References are retrieved first from online account and transferred to desktop before any changes from desktop are updated in online account.

This video highlights how to sync multiple desktop libraries by using the sync feature and is 5 minutes: <https://www.youtube.com/watch?v=YIzbdvRNz8Q>

Need More Help?

EndNote's Help files contain a lot of very good information, and is generally well-written. Advanced users are advised to review the table of contents and read sections of interest.



You can also view the EndNote page at Hardin for additional information and FAQ page:

<http://www.lib.uiowa.edu/hardin/endnote.html>

As always, you can contact the Hardin Library Reference Desk (lib-hardin@uiowa.edu, (319) 335-9151) with questions about using this program.

If you experience problems with the program functioning, or if there are advanced troubleshooting needs, please contact EndNote support at: 1-800-336-4474 (press option 4 when prompted).

Acknowledgments

Thank you to Lynda Howell at UTHSCSA, who wrote the handout which formed the basis of this guide