

## Using EndNote 9

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### Introduction

EndNote is a bibliographic management software program used to manage citations and facilitate the publication process. EndNote allows the user to create a **library** to store citations. The library is similar to a filing folder in your desk drawer. Additionally, EndNote will allow the user to export the citations from the library into a word processor to produce a manuscript in a variety of publication styles (e.g., APA, MLA, Chicago, or journal specific).

### Creating a Library

For our example, we will create a library with citations on the topic of penguins.

1. **Open** EndNote
2. Under the **File** menu, select **New**. Name the new folder **penguins.enl**

The new library will be created with 0 references.

### Adding Citations

We will learn 4 ways to add citations to your library: 1) manually, 2) by direct export from a databases, 3) by importing from a database and 4) searching a database through EndNote connection.

#### A. Adding Manually

This option is most often used to add citations to articles/books that you own. Usually they are articles kept in a paper file or are references in another electronic format (such as a Word bibliography).

To add a new reference:

1. From the **References** menu select **New Reference**
2. Select the **Reference Type** from the pull down menu
3. Fill in the **fields**
4. When done, **close** the **New Reference** box to add the citation to the library

When adding authors, use the format Lastname, Firstname and enter multiple authors on separate lines. Article and book titles should be entered in "sentence case" which means that the first letter of the first word is capitalized, but subsequent words are not (proper nouns and acronyms excluded).

### *Examples*

Ings, Raymond; Waran, Natalie K.; Young, Robert J. "Attitude of zoo visitors to the idea of feeding live prey to zoo animals." *Zoo Biology*, Vol 16(4), 1997. pp. 343-347.

Richdale, L. E. *Sexual Behavior in Penguins*. Oxford, England: University of Kansas Press, 1951.

### **B. Direct Export**

Exporting records from a database is the easiest way to add a large number of citations to your library. However, the process is not seamless. Some database providers (like EBSCO and Ovid) work very well. Others may need to be tweaked considerably. We will discuss the problem cases in section C.

#### *In EBSCO*

1. **Connect** to PsycINFO
2. Perform your search (penguins) and select relevant citations.
3. **Add** the article citations to your folder.
4. Click on **Folder has items**
5. Click on **Save to Disk**
6. Change tab to **Bibliographic Manager**
7. Change radio button to **Direct Export**
8. Click on **Save**
9. In EndNote, **select the library** into which you wish to import the citations
10. If EndNote prompts you to select a filter, choose the PsycINFO (EBSCO) filter

Upon importing, the citations will display in a window that includes only the imported citations, not any citations that were already in your library. This feature allows you to double check the imported citations before mixing them in with your library. To view your entire library: from the **References** menu, select **Show All References**.

The new InfoTrac setup is a little tricky to figure out, so we are also listing how to direct export from InfoTrac Powersearch

1. Connect to Infotrac Powersearch
2. Perform your search (penguins) and select relevant citations by putting a check next to **mark**
3. When you have selected the relevant citations, click on the **Marked Items** tab at the very top of the screen"
4. Click on **How to cite marked items**
5. Under the "export to third party software" list at the bottom, choose **Endnote**
6. click **Export**

7. At the next screen – choose open – then you will be asked for which of your EndNote libraries you want to export these citations to. Choose the library, and then click **Open**
8. Your citations should all now have appeared in your EndNote Library – briefly scan them for errors, and in particular...check that abstracts ended up in the abstracts field (and not the notes field.)

### C. Importing from a database

Not all databases have a Direct Export feature for EndNote. In such cases, it is necessary to first save the citations as a text file, and then import the file into EndNote. You will need to make sure EndNote has a filter for your database, though.

Checking for EndNote Filters:

1. Open EndNote
2. From the File menu, choose **Import...**
3. From the Import Option menu, choose **Other Filters...**
4. A new window will pop up with a list of all the available filters. You can sort by name of the database (HAPI) or by the provider (Ovid). Make sure you check both for your database. .
5. After you highlight your database, look in the Comments field to see if you will need to modify the entries in EndNote.
6. If you do not see your database or provider listed, check the EndNote site to see if a filter is available: <http://www.endnote.com/support/enfilters.asp>
7. If you do not find a filter, search in Google (EndNote and Factiva) to see if anyone else has developed a filter.
8. If no filter exists, you will need to enter the citations by hand

But, let's work with the assumption that you have found your filter in EndNote. For this example, we will be searching the medical database, PubMed:

*In PubMed*

1. Perform your search
2. Select the items you want by clicking in the boxes preceding each item number
3. Choose **MEDLINE** from the pull-down menu after the **Display** button
4. Choose **File** from the pull-down menu after **Send To** save the citations to your computer
5. Click **Send To**
6. Change the file extension to **.txt** instead of **.cgi** and select the place on your computer where you wish to save the file (**remember** the file name and location)

### *In EndNote*

1. From the **Edit** menu, select **Import Filters**, then **Open Filter Manager**
2. Scroll down to find **PubMed (NLM)** and check the box for this filter
3. Close the Filter Manager window  
*Note: Once you have selected PubMed as a filter, you will never have to repeat steps 1-3*
4. From the **File** menu, select **Import**
5. Click on **Choose File** and navigate through your computer's directory structure to find the file you saved in step 6 above
6. From the pull-down menu under **Import Option**, choose **PubMed (NLM)**
7. Click the **Import** button to pull in all of the records saved from PubMed

### **D. Searching a database through EndNote Connection**

This method is only for those databases which are free, such as the library catalog or PubMed.

1. In EndNote, from the Tools menu go to Connect and click **Connect...** in the sub-menu
2. A list of possible databases is displayed. Please note that a number of databases for which we pay are listed; you will not be able to access them through this system without a login and password. We suggest searching these databases using methods B or C above
3. For this example, we will search the McConnell Library catalog, listed as "Radford U". Select it and click **Connect**
4. Type in your search terms (**penguins**) and click **Search**
5. Confirm Remote Search tells you how many citations you have retrieved. Adjust the number you want to import, and click on **OK**
6. Double-click on a citation to see the full record
7. Highlight the ones you want to import into your library, then click on the **Copy x References** to EndNote button in upper right hand corner of box

### **Attaching a PDF File to a Citation**

If the full text of an article is available in PDF, you can attach it to its citation in your EndNote library. Doing so will allow you to open the PDF from the citation record.

1. **Save the PDF document** to the desktop or another area, such as your H drive. Just remember where it is!
2. **Open the EndNote library** containing the citation
3. Double-click to open the citation for the PDF
4. Scroll down and click on **Image**
5. In the EndNote 9 window, go to **References** and click **Insert Object**

6. A new window will open. Click **Choose File** button
7. Navigate to the location where you saved your PDF file. Highlight the file and click **Open**
8. Close the citation

## **Working with Your Library**

EndNote allows you to personalize your library with various tools: adding keywords, searching your library, sorting the library, and eradicating duplicate records.

### **A. Adding Keywords**

You can add keywords to any field in the record; however, you should never add or remove information from the fields used in citations (author, title, journal title, etc.). Fields often used to customize the records include notes, keyword, or any of the six custom fields. For today's class we will add keywords to some of the records in our library. Then we will search our library and retrieve only those records that contain our keyword.

1. Select a handful of records by clicking on the items in the library. To select more than one item, hold down your control key while clicking
2. From the **References** menu, choose **Show Selected References**. This will isolate the records you will change
3. Select **Change and Move Fields** from the **Reference** menu
4. Select the **Change Fields** tab
5. Select **Label** from the **In:** pull down menu
6. Select **Insert before field's text** and type "**behavior**" into the
7. Click **OK**

Now each of the imported citations will have the text "**behavior**" added to the record.

### **B. Searching the Library**

1. From the **References** menu, select **Search References**
2. Select **Label** from the pull down menu
3. Type **behavior** in the search box
4. Click **Search**

As your library grows it will be important to be able to sort and manage citations easily. Using keywords is one way to help you manage your library.

### **C. Sorting the Library**

1. To sort by Author, Year, or Title simply click on the **column headings** at the top of your library. Clicking once sorts A-Z, clicking again, changes the sort to Z-A
2. To sort by any other field or to sort by multiple fields go to the **References** menu and select **Sort References**
3. Select the **field(s)** to sort by

4. Click the **AZ** icon to change the sort order
5. Click **Sort**

#### **D. De-duping the Library**

1. From the **References** menu, select **Find Duplicates**
2. If any duplicate records are found, EndNote will display the duplicates and highlight one instance of each record
3. To delete the duplicates, choose **Delete References** from the **References** menu

### **Cite While You Write**

One of the most useful features of EndNote is the ability to create in-text citations and bibliographies for manuscripts. In EndNote this feature is called Cite While You Write. After selecting the appropriate publication style you can format your entire manuscript in the pre-formatted style. It is easy to later re-format the paper for another style (very useful if your paper was rejected by *Nature* and now you want to submit to *Science*).

#### *Setting Styles*

Before you create your manuscript, you must first define your publication styles.

1. From the **Edit** menu, select **Output Styles**, then **Open Style Manager**
2. The styles are arranged alphabetically by journal title or format. You may choose multiple styles
3. Close the Style Manager

Once you have selected your desired styles from the Style Manager, you will notice that the selected styles are now listed in the EndNote menu bar, under the pull-down menu labeled **Annotated**. To set a default style (the one you publish in most frequently) simply select it from that menu.

*A quick note about styles:* not every journal is represented in the Style Manager. In fact, the current list is only about 750 styles long. When you consider there are hundreds of thousands of periodicals, the list seems short. You will inevitably encounter a time when the journal you want to publish in is not located in the list. What can you do? There are two basic options.

1. Visit <http://www.endnote.com/support/enstyles.asp> and sort this list by Style Name. EndNote keeps a database of styles that are submitted by other users. If another user has created and submitted the style for your journal, you will find it in this list. Simply click on the **FTP** link to download the style into your **C:\Program Files\EndNote\Styles\** folder. It will appear in the Styles Manager the next time you open it.

2. Check with the journal publisher to see if the style for the journal you are submitting to is the same as other journals. Check for those other journals on the list.
3. Create your own style. The EndNote manual will guide you through the step-by-step process for creating your own customized style. Be sure to have the journal's Instructions for Authors handy as a guide.

#### *Formatting the Manuscript (In Word)*

1. **Open Word** and open your document
2. From the **Tools** menu, select **EndNote 9**, then **Go To EndNote**. This will open the EndNote program if not already open
3. Switch back to Word
4. **Position your cursor** where you wish to insert the first reference
5. Choose **Tools**, then **EndNote 9**, then **Find Citation(s)**
6. Search for an appropriate reference to cite. Type the author's last name in the **Search for** box, then click **Perform Search**
7. Highlight the citation you want, then choose **Insert**  
*Note: to cite more than one citation, click while holding down the Ctrl key*
8. Repeat steps 5-7 to insert all of the necessary citations

#### *Inserting Page Numbers into In-Text Citations*

When you insert a citation into your paper, EndNote can put in the author and year but has no idea what page you are citing. You will need to add this information:

1. Click on the citation you want to edit
2. From the **Tools** menu, select **EndNote 9**, then **Edit Citation**
3. A new dialog box will pop up. Put the page number(s) into the appropriate box.
4. Click **OK**

Please note that these are the steps to also modify a citation- to exclude the author's name, or a year, for example.

#### *Reformat with a Different Style*

The manuscript automatically formats in the reference style that was last used. If you wish to select a different format, simply follow the steps below.

1. From the **Tools** menu, select **EndNote 9**, then **Format Bibliography**
2. In the **With Output Style** box, select the desired format
3. Click **OK**

#### **Need Further Help?**

For technical assistance (installing the software, troubleshooting computer error messages), contact the Walker Help desk at 831-7500.

For assistance using EndNote, contact Kevin Tapp, [ktapp@radford.edu](mailto:ktapp@radford.edu) or Candice Benjes-Small, [cbsmall@radford.edu](mailto:cbsmall@radford.edu). We don't promise to have the answers, but we'll try!

*This manual is based on University of Southern California's Norris Medical Library EndNote 7 manual and has been modified with permission.*

