Brief Guide to using EndNote X6

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Note: This document only explains the basic function of EndNote X6 that will be used by most students/users. For other functions you will need to refer to the EndNote X6 Getting Started Manual which is available at http://endnote.com/training/mats/enuserguide/eng/enguide-full.pdf

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EndNote is a bibliographic software that is used to store and manage all your references. It is actually a database of your references (known as Endnote Libraries). It allows you to import and organise references into groups to easily manage many projects using the same library. The references could then be use as you write your paper or thesis, and create your bibliography in the style of your choice. References can be imported from databases such as PubMed MEDLINE, OVID MEDLINE, CINAHL and ScienceDirect. EndNote works with Microsoft Word, OpenOffice.org Writer, Wolfram Mathmaticva, and Apple Pages.
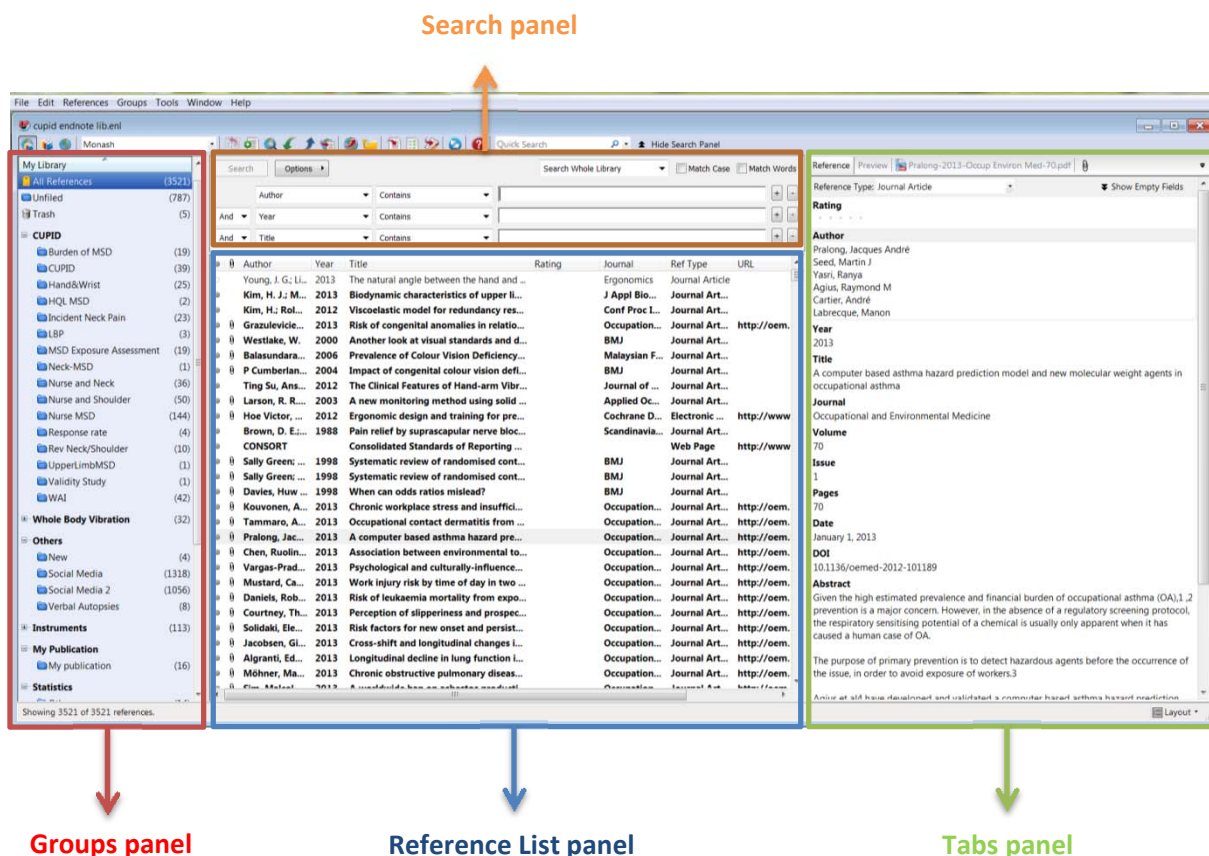
1.   Navigating the Library Window

To start EndNote in Windows 7,

Click on the **Start button** → **All Programs** → **EndNote** → **EndNote Program**
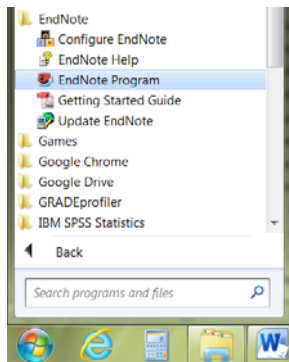

This is the main EndNote X6 windows

Search panel

Groups panel   **Reference List panel**   **Tabs panel**

2.   Creating a new EndNote Library:

- From **File** menu, select **New**.
- Name the file and save it to a location of your choice.

3.   Importing a Journals Term List

Before entering references in your EndNote library, consider importing "medical journals term list." This allows you to use output styles that require either full title or abbreviation.

- Under **Tools** menu, select **Define Term Lists** OR press **Ctrl +4**
- Click on **Journals**
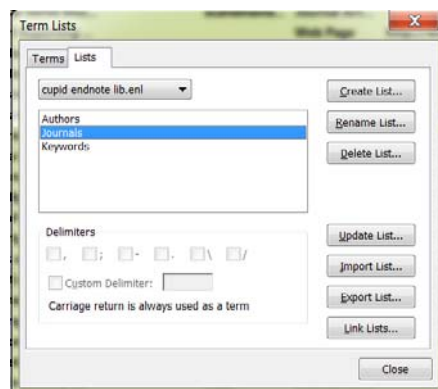
- Click on **Import List**
- Open the **Term Lists** folder. It is located in the location where the EndNote X6 software was installed. For Windows 7, it will be located at "*C:\Program Files (x86)\EndNote X6\Terms Lists*".
- Open the **Medical.txt** file.
- When import is completed, click **OK** and then **Close**

Sometimes you will need to add New Term, Edit Term or Delete Term in the Journal Term List, to do this:

- click on the **Terms** tab on the Term Lists pop-up, or
- Under **Tools** menu, select **Open Term Lists,** click on **Journals Term List**
- Click on the list of the Full Journal, search the journal by strolling down the list manually or typing the first few letters of the Full Journal name.
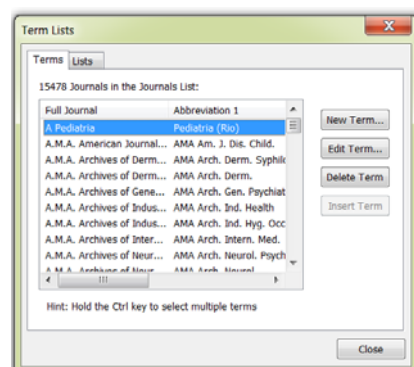
4.   Selecting the Correct Format and Filter

Database	Save citations in this format	Use this EndNote filter
PubMed	MEDLINE	DIRECT EXPORT
OVID MEDLINE	citation + abstract + subject	DIRECT EXPORT
Science Direct	citation plus abstract	DIRECT EXPORT

Note: Filters are used to interpret the data in the file exported from the online Databases.

5.   Set-Up Your Import Filters:

- Open your EndNote Library
- Click on **Edit** then **Import Filters** then **Open Filter Manager**
- Select appropriate filters by clicking in the appropriate boxes.

☑ MEDLINE (OvidSP)   OvidSP

☑ PubMed (NLM)   National Library of Medicine

- Close the window, using the "**X**" at the upper right corner
- You may select other filters if you search in other databases.

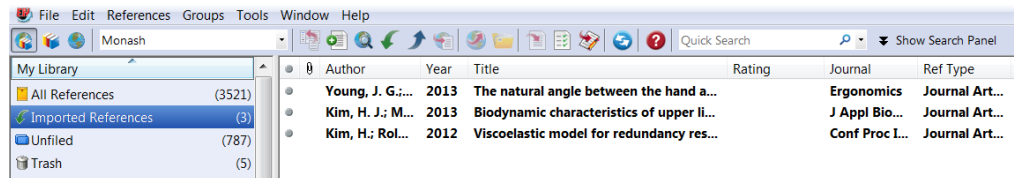## 6.   Importing citation in to Endnote

PubMed Citation

- Search the articles in PubMed
- Select the results you would like to export
- Click on the '**Send to'** link select **Citation manager** in the *Choose Destination* options
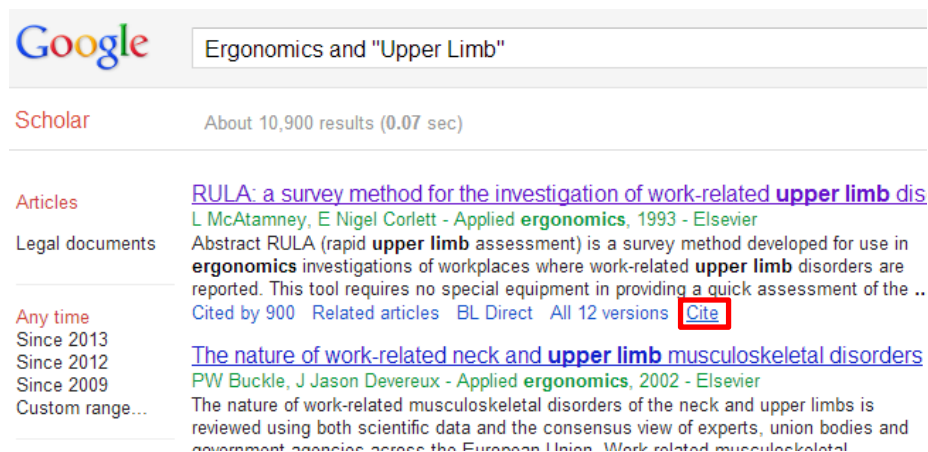- Click on the **Create File** button
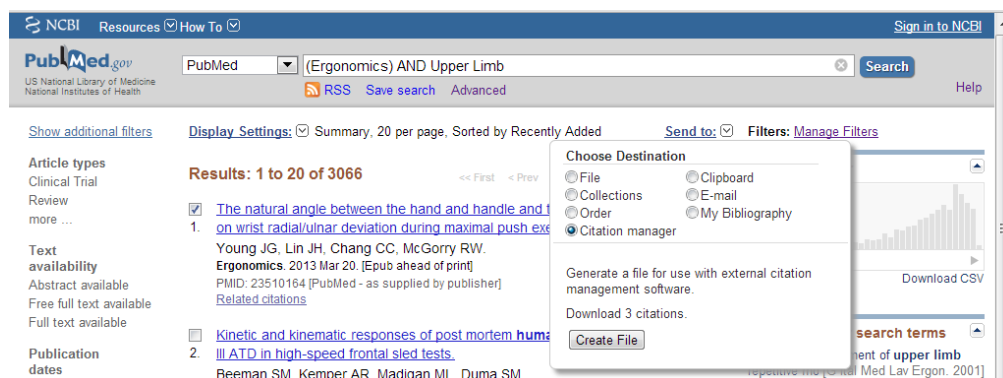
- Open the downloaded file (the name would be *citation.nbib* if that is the first file in your download folder);
    - If the EndNote program is Close, this will open the EndNote programme
    - If the EndNote program is Open, the citation will appear in the Imported References tab.
    Note: When importing citation the EndNote X6 program need to be on the main page, i.e. pop-up menu or citation page should be closed.

Google Scholar Citation

- Search the articles in Google Scholar, http://scholar.google.com/
- Select Cite at the bottom of the article you like to export.

- A pop-up window appear
- Select Import into EndNote

- Open the downloaded file (the name would be *scholar.enw* if that is the first file in your download folder);
  - If the EndNote program is Close, this will open the EndNote programme
  - If the EndNote program is Open, the citation will appear in the Imported References tab.

    Note: When importing citation the EndNote X6 program need to be on the main page, i.e. pop-up menu or citation page should be closed.
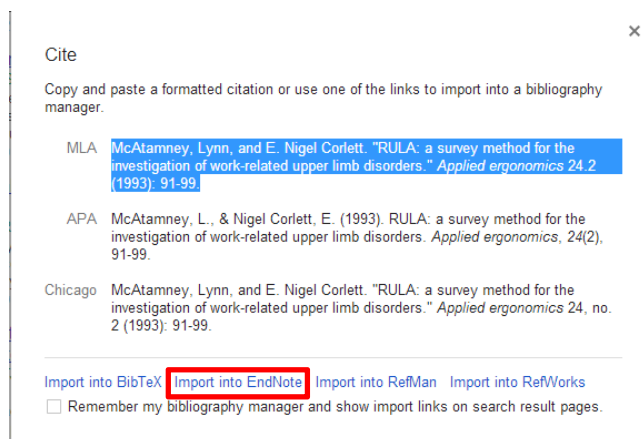
- For other databases like, OVID MEDLINE and ScienceDirect; can also be DIRECT EXPORT or save file for import later.

7.   Importing Files

These are files that contain bibliography data. Before importing the files, you will need to know the type of data within the files. Unless the correct file type has been selected in the **Import Options**, the data in the file would not be imported in to EndNote.

- Click on **File → Import File→** you will see the following screen
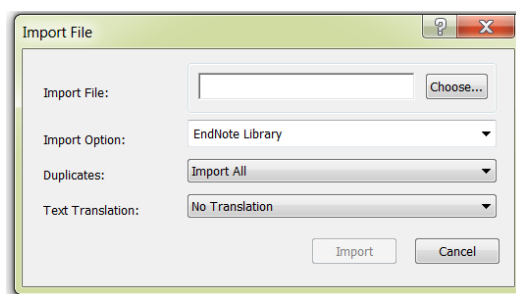
Import File click on Choose file to locate your downloaded file

Import Option select database from which you downloaded your citations

Duplicates: lets EndNote know what to do with duplicate citations.

   Import all

   Discard duplicates

   Import into Duplicate Library creates another library with same names as yours, plus DUPL. You can then examine the duplicates library and decide whether or not to add them to your library by cutting and pasting.

Text translation select **No Translation** unless you are importing citations in other language format.

- Click **Import**
- If you don't see your citations being counted as they are being imported, check to be sure you saved the file in the correct format, i.e. you have selected the correct **Import Option.**

- Your citations will now appear in the **Imported Reference** tab.

8.   Editing a reference

There are two ways to edit a reference

- Double-click a reference in the **Reference List panel**, a new window will appear and then edit reference in the new window, or
- Click on a reference and edit it directly on the **Reference** tab on the **Tabs panel**.

To add additional information in any of the empty fields

- Click on **Show Empty Field** to show the empty fields
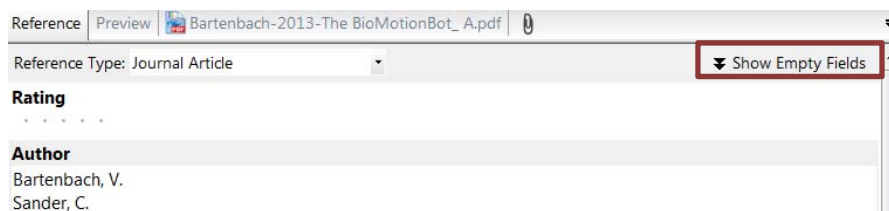
- Then add information in the desired fields.

9.   Adding References Manually

- Open your database, click on **References → New Reference**, a new window will appear
- Select **Reference Type** (default is journal)
- **Author**; use a standard format for authors. It is advisable to enter the names in full (i.e. do not use initial for the firstname and other name, as this will be done automatically according to the citation style that you will be choosing)
    - Doe, John Damien (last, firstname)
    - Enter author's name one per line with no ending punctuation; just hit return

    When the reference does not have individual authors but only contains organisation name; e.g. Ministry of Health Malaysia,

    - Enter organisations with a comma after the name so EndNote will retain the word order ; e.g. Ministry of Health Malaysia,
- **Title:** Use sentence case (capitalise first word and proper nouns only). Enter title with interior punctuation only and capitalisation the way you want it to appear in the document.
- **Year:** Enter year as 4 digit year.
- **Pages**: Add pages in any format; e.g. 235-239, 235-39, 235-9
- **Access Date**: This should be completed for Web Page; e.g. 01 October 2011

*Note: Important - do not add an ending period or extra punctuation in all fields*

10. Search Remote Databases

To search PubMed directly from EndNote

- On the **Group Panel** select the **PubMed (NLM)** on the **Online Search** sub-menu
- Enter your search terms on the **Search Panel** as you would do on the PubMed website
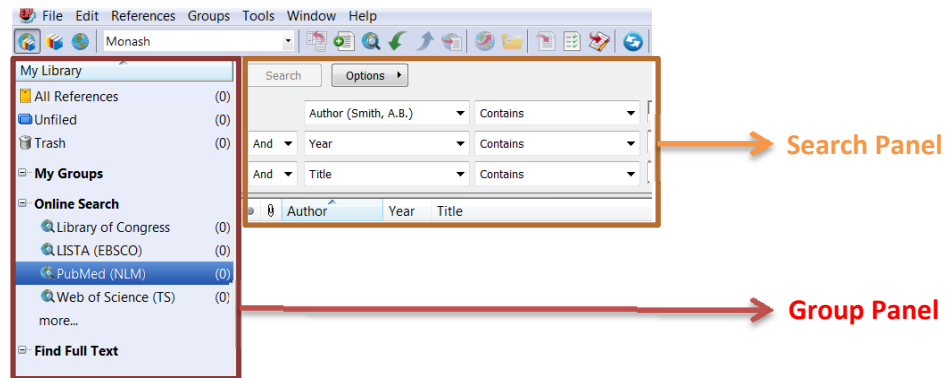
- Search PubMed (EndNote) for '**ergonomics**' and '**upper limb**'
- Enter those terms in the **Search Panel** and click **Search**
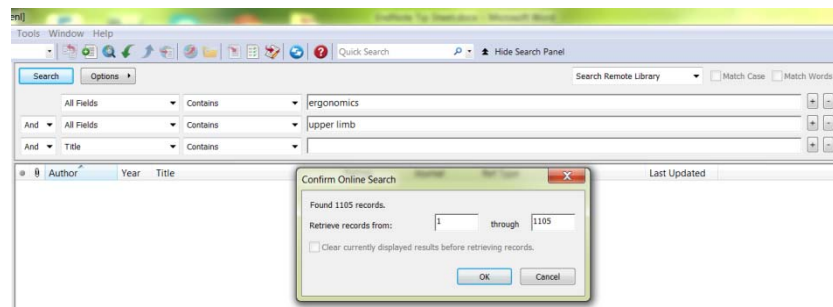
- Select and retrieve 1 through 20 results, Click **OK**. The top 20 results will be retrieved.
- You will notice that the **PubMed (NLM)** group in your **Group Panel** now contains '**20**' results
- You may view, edit and delete these results.
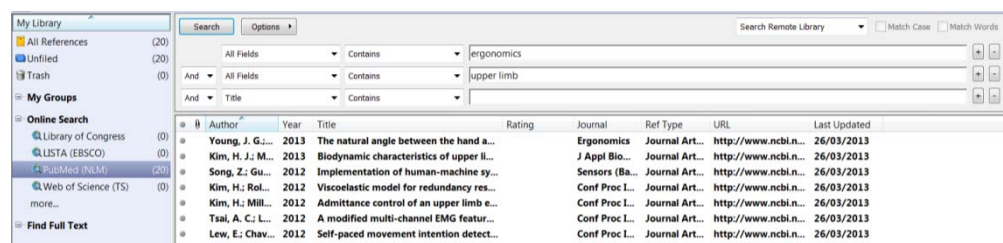
11. Searching for Full Text articles

To find full text of the references that you have retrieved

- First select the references that you want to find full text article, to select a group of records, click on the first record and then holding down the **Shift** key and then click on the last record in your list. Those selected record (citation) will be highlighted.
- Click on **References → Find Full Text → Find Full Text**
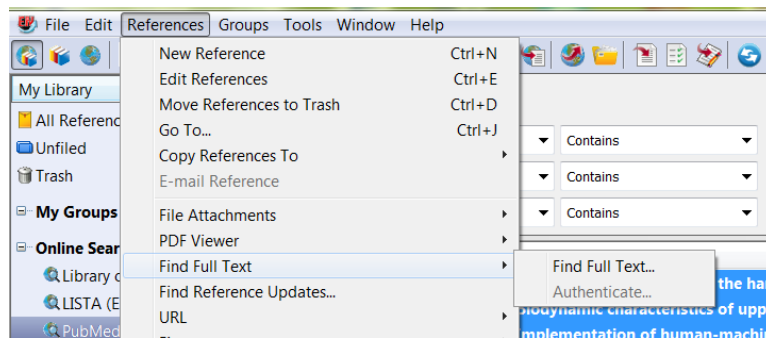
- The copyright warning will pop-up, read the warning and if you agree with the warning click **OK**
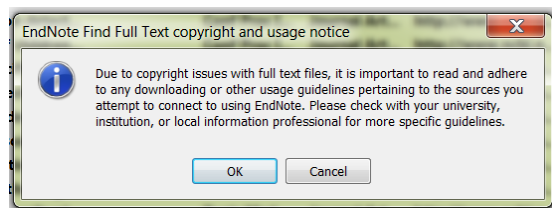
The EndNote X6 will search for the full text article online and will retrieve it one at a time. You will be able to track the progress of the search on the **Group Panel** under the **Find Full Text** group.

12.   Searching References

You can also search for specific references within your EndNote library; you can search your whole library or just specific Groups in your library. The same technique used to search online databases could also be applied here.

- Click on the **All References** (to search the entire library) in the **Group Panel** to search all references in your library or click on specific **Group** that you want to search to references within those groups.
- Perform the search in the **Search Panel**; e.g., Search for 'robot' and 'children'
- Enter those terms in the **Search Panel** and click **Search**
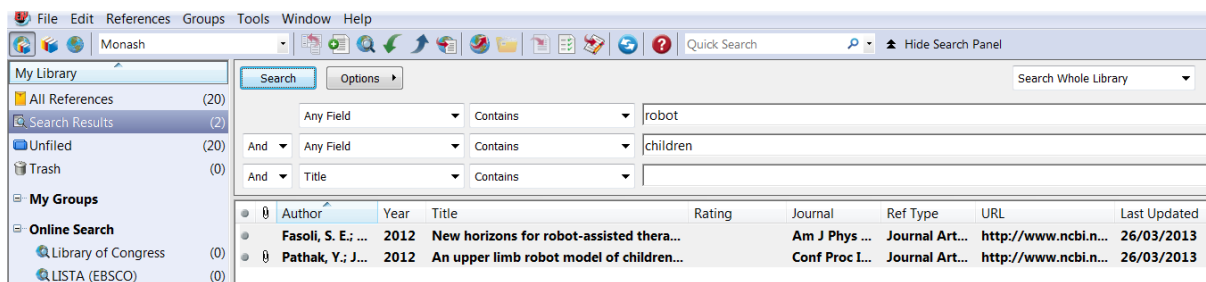
The number of results found for your search is displayed on the **Search Results** in the **Group Panel**

13.   Creating a Groups

Groups are used in *EndNote* to organise your references. You may use **Groups** to organise your references according to projects, papers you are writing or thesis chapter (for example Introduction, Discussion, etc.). You may include one reference in more than one **Groups**.

There are mainly three types of **Groups** in *EndNote X6*, **Groups**, **Smart Groups** and group groups (**Create from Groups**). **Groups** are static collection of references; i.e. the references in the **Groups** do not change automatically, you will need to add or remove them manually. **Smart Groups** are dynamic; it is created through a **Search** result. The references in the **Smart Groups** will be added automatically if the new references retrieved matched the search terms.
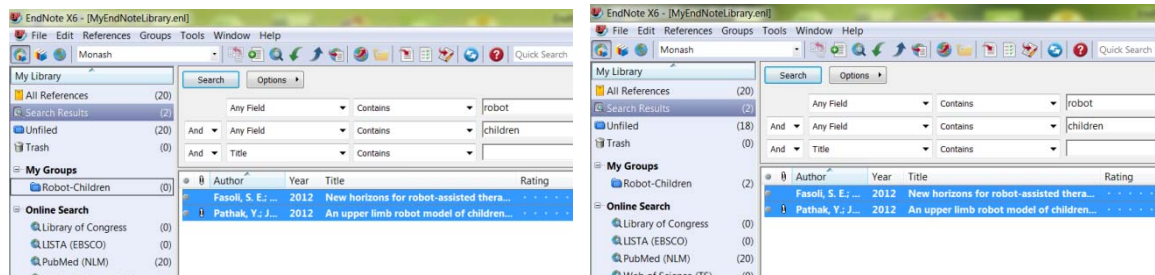
Creating a Group

- Select **Groups → Create Groups**
- Enter the name of the **Groups** in the **Groups Panel** under **My Groups**
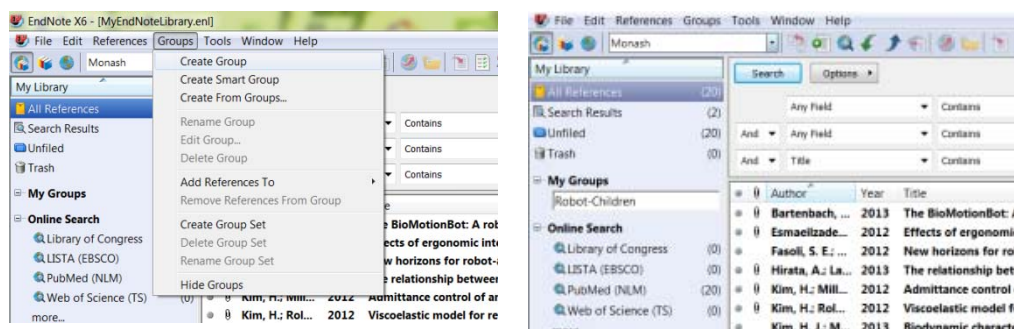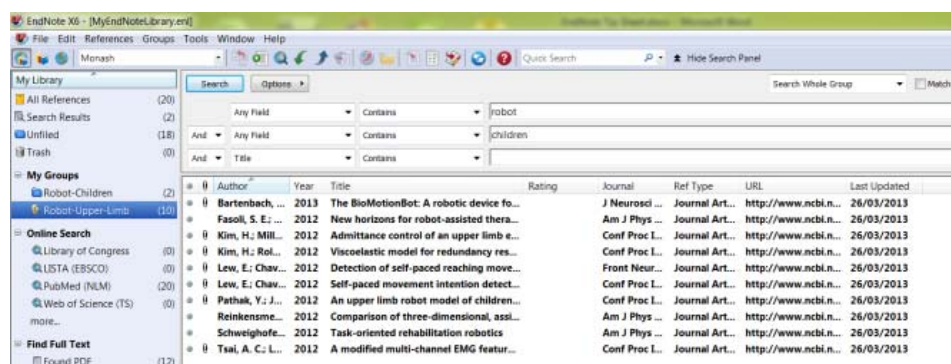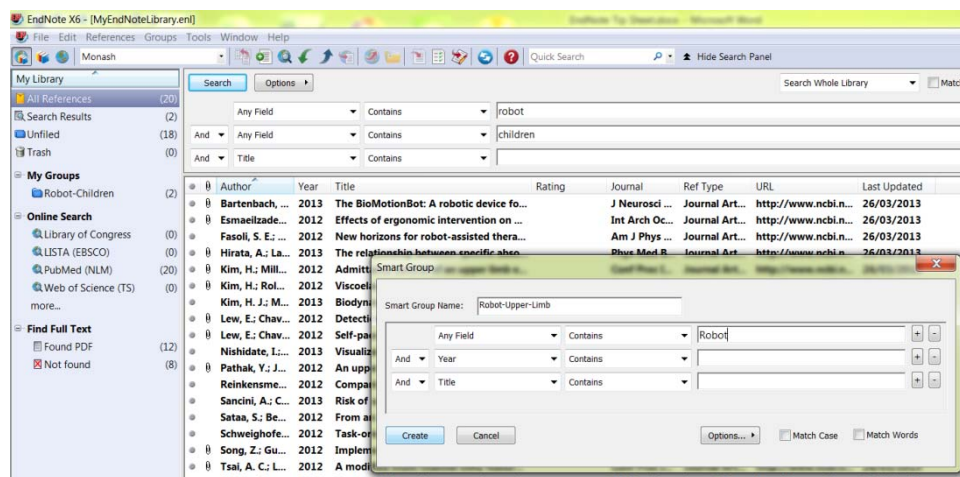
Adding References to the Group

- Select the references to be added to the **Group** from the **Reference List Panel** and then Drag and Drop those references into the **Group** in the **Group Panel.**

Creating Smart Groups

- Select **Groups → Create Smart Groups**
- Enter the name of the **Smart Groups**.
- Enter the search terms
- Click **Create**

The **Smart Groups** is created in **My Groups** in the **Groups Panel**.

Create From Groups

You can create a new Group from the combination of multiple groups. The AND, OR and NOT Boolean could also be used to further limit the references in the new Group.

- Select **Groups → Create From Groups**
- Enter the name of the new **Group** name.
- Select the Groups to be combined
- Use the AND, OR and NOT Boolean to refine the new Group
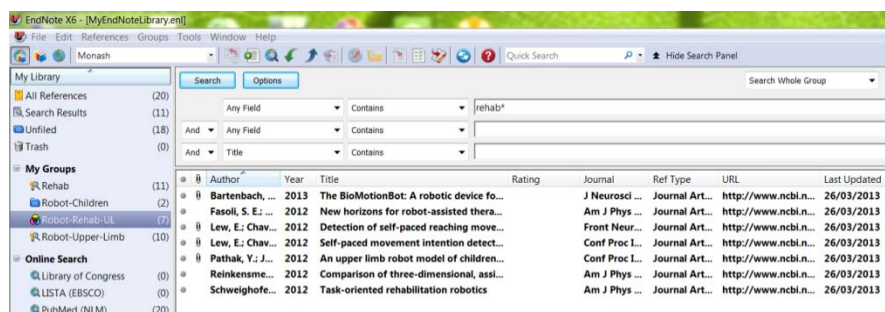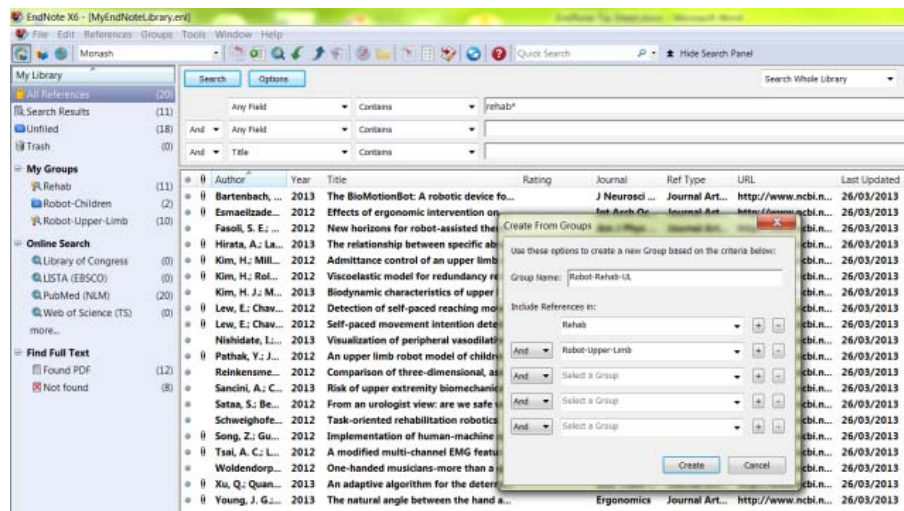
14.   Creating Group Set

Group Sets are useful to organise your references based on Projects. It would be good to separate the references of projects that are not related.

- Select **Groups → Create Groups Set**
- Enter the name of the new **Group Set** name in the **Group Panel**.
- You may now **Create** new **Groups** for the new **Group Set** or Drag and Drop existing **Groups** into the **Group Set**.
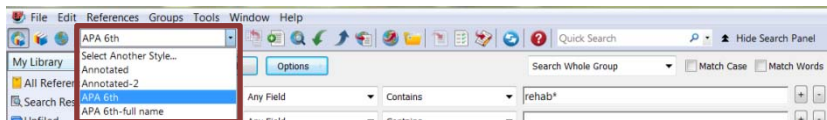
15.   Selecting citation style

There are many different type of citation style available. The criteria for selecting a specific citation style will depend on the requirement of the journals, publishers or in the case of a Thesis, your University. The advantage of using a Bibliography Software like EndNote is the simplicity in changing the citation style as required. Most of the citation styles are based on the APA (American Psychological Association) and Vancouver format.

The citation styles could be previewed in the **Preview** tab on the **Tab Panel**.
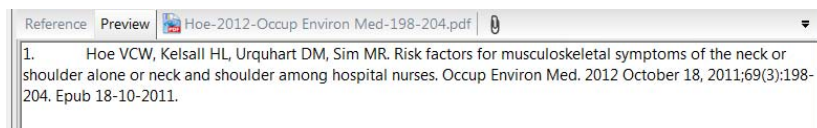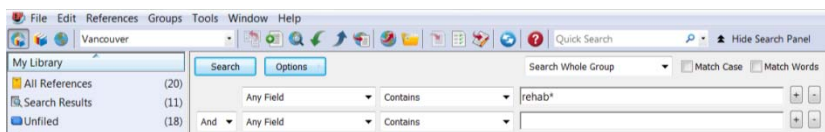
- Select the **Preview** tab on the **Tab Panel**. The citation style shown below is APA style.
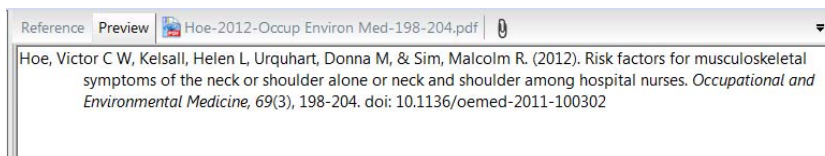
- To change the Citation Style select the desire style from the Style Dropdown Menu


- Change it to **Vancouver** style, and see the citation style change in the **Preview** tab


- If the desired style is not available on the Style Dropdown Menu, click on **Select Another Style**

- For instance if you are going to submit an article to BMC Public Health, you would like to select their citation style.
- Select the **BMC Public Health** style from the **Choose A Style** pop-up menu, then click **Choose**.
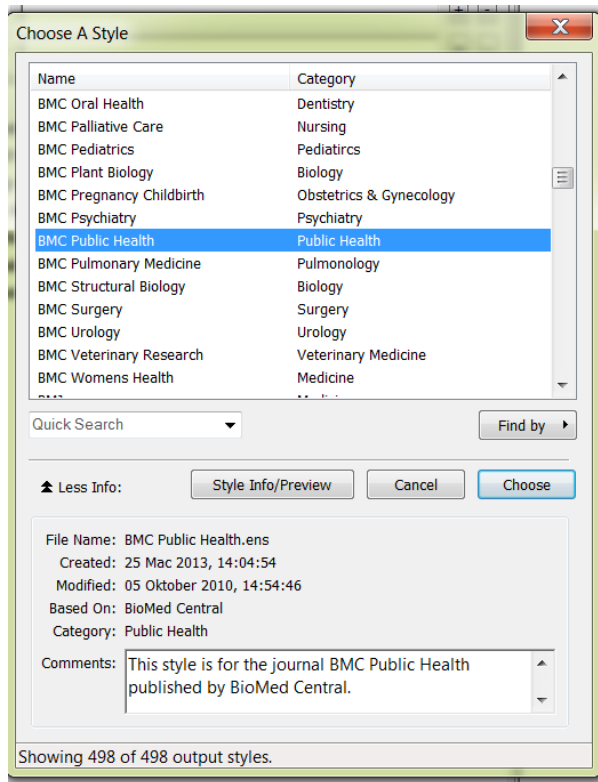
- The style on the **Preview tab** will change to reflect the BMC Public Health citation style.
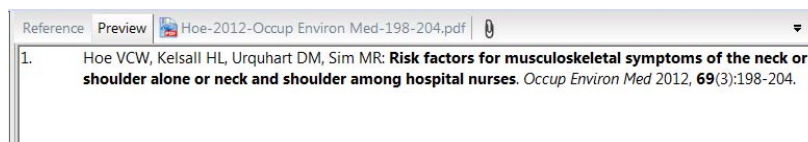
16. Previewing and annotate PDF documents

Starting from EndNote X5 you are able to preview PDF documents attached to the references directly in EndNote.

- Click on the PDF document in the **Tab panel** to preview the document
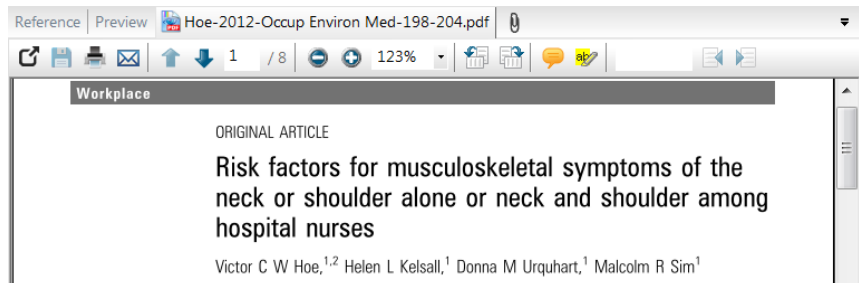
- You will also be able to annotate the PDF document. The tools available are ![highlight] (highlight) and ![note] (note) tools. This is useful to put highlight and notes on the PDF document related to your Projects.
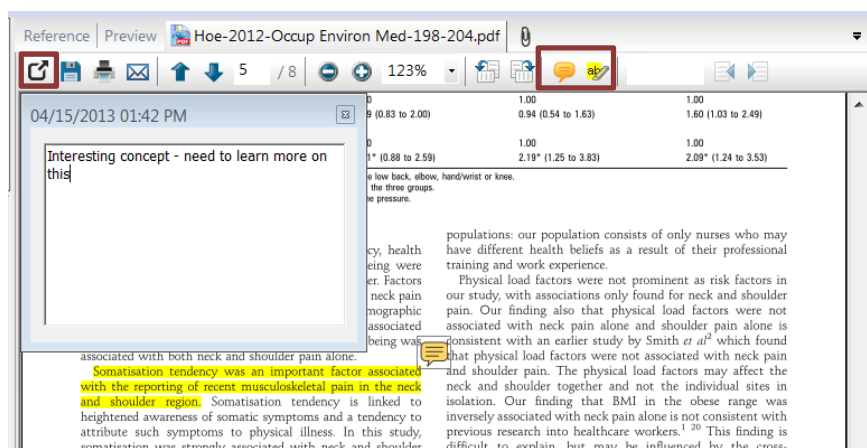
- To view the PDF in full screen click on this button ![button].

## 17. Inserting References in Microsoft Word documents

The Cite While You Write feature in EndNote allows you to insert references while you are writing your report. To do this you must ensure that EndNote has been properly installed and the EndNote ribbon is visible in your Microsoft Word document.
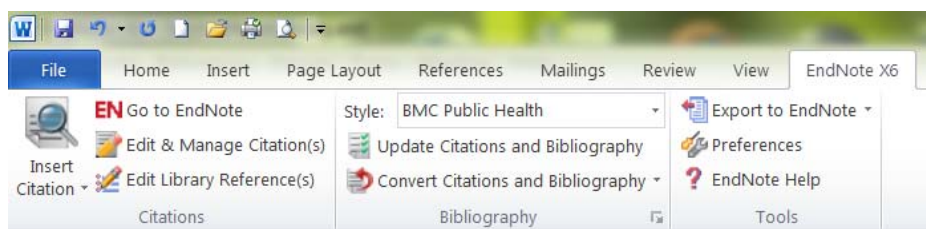
If this is not visible please read the EndNote manual or contact your IT administrator to troubleshoot the problem.

## To insert a reference into Word document within the Word document

- Open the Word document
- Place the cursor at the location you would like to insert the reference
- Select the EndNote ribbon
- Select **Insert Citation → Find Citation**
- Search for your reference, enter the search term in the search box then click **Find**
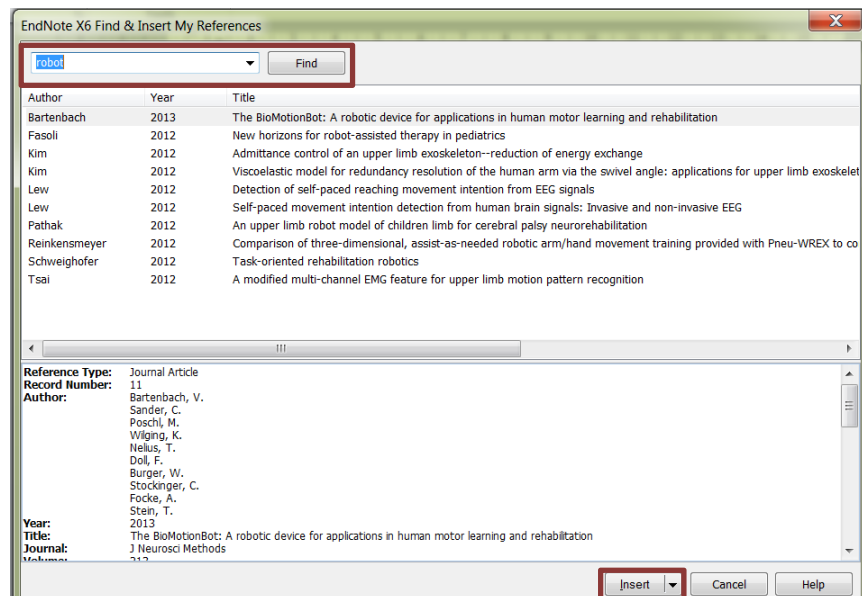

- Select the reference you wish to insert and click **Insert**.
- To select more than one reference, hold down the **CTRL** key on your keyboard while you click on each reference.

To insert a reference into Word document from EndNote

- Open the EndNote library
- Select the reference to be inserted. To select more than one reference, hold down the **CTRL** key while you click on each reference.
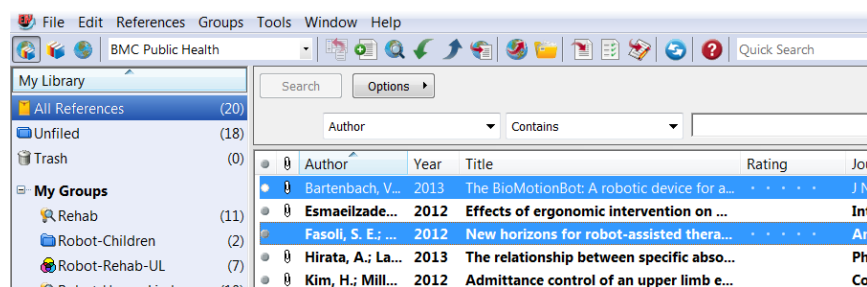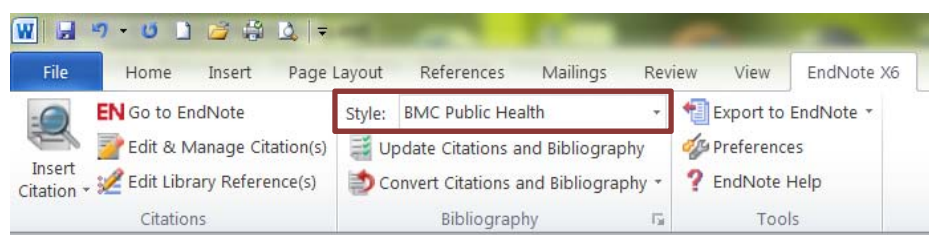
- Select **Tools → Cite While You Write (CWYW) → Insert Selected Citation(s)** OR click **Alt+2**
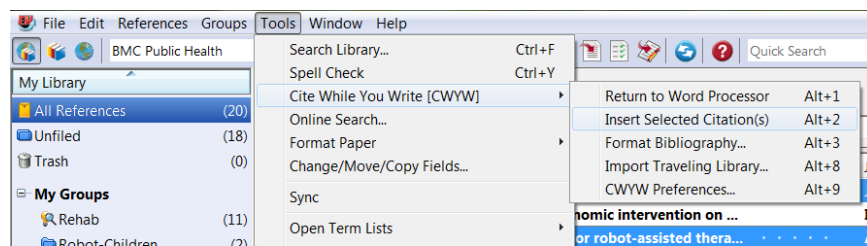
Citation style

- To change the citation style, in the **Style** dropdown menu choose the desired style
- Then click the Update **Citation and Bibliography** button

Example:

1. **BMC Public Health**: [1, 2]
2. **APA**: (Bartenbach et al., 2013; Fasoli, Ladenheim, Mast, & Krebs, 2012)
3. **Vancouver**: (1, 2)

Instant Formatting

It is a good practice to **Turn Off Instant Formatting** during writing or editing your document as this will increase the speed of the Microsoft Word programme and reduce the disturbance to your document style. When **Instant Formatting** is turn off the citation will be inserted as (**Unformatted Citation**; e.g. {Bartenbach, 2013 #11;Fasoli, 2012 #17}) and bibliography will not be inserted at the end of your document.

- To turn off **Instant Formatting** click on this symbol ⌐ at the bottom right-hand corner of the **Bibliography** pane on the **EndNote X6 ribbon**.

- Click on the **Instant Formatting** tab and then click on the **Turn Off** button, then **OK**.
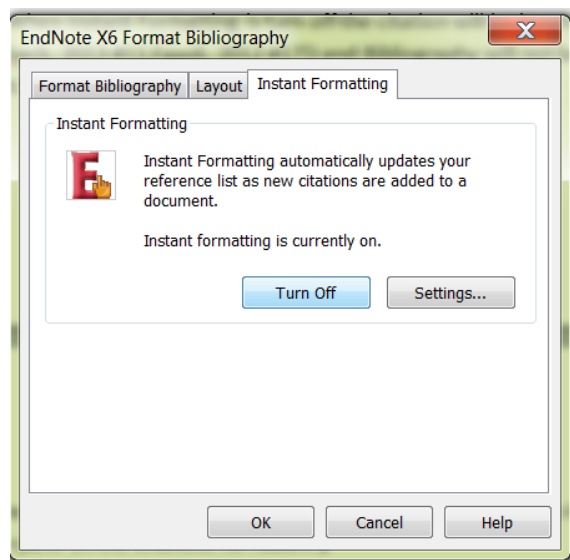
Convert Citations and Bibliography

During the process of writing and editing the document you may want to convert the citation to **Unformatted Citation** so that the Microsoft Word programme runs smoothly (or quickly). You will also need to convert to **Unformatted Citation** before you merge two or more Word document into a single file.

Citation and bibliography would also need to **Convert to Plain Text** when you want to send the document for journals, publishing or examination. The document will be saved as a new document where the EndNote codes will be removed and only plain text of the citation and bibliography remain.

Note: In a plain text document you will not be able to change the citation style as the EndNote codes has already been removed.

- Click on the down-arrow at the right-end of the **Convert Citation and Bibliography** button to reveal the dropdown menu
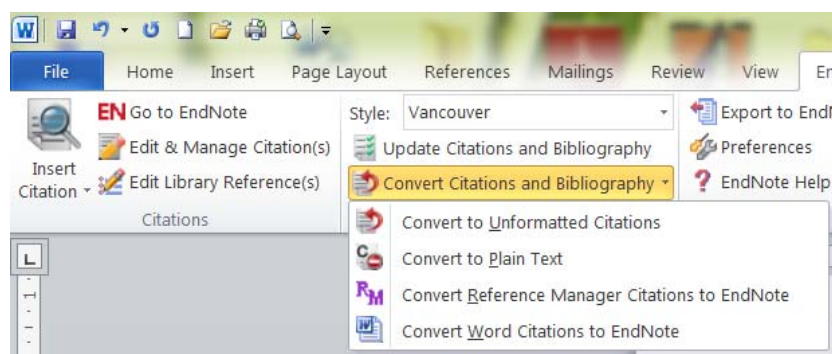
- Then click on the Convert to Unformatted Citation or Convert to Plan Text.