



Brief Guide to using EndNote X9

Victor C.W. Hoe

Department of Social and Preventive Medicine

Faculty of Medicine, University of Malaya

Note: This document only explains the common function of EndNote X9 that will be used by most students/users. For other functions you will need to refer to the EndNote X9 Getting Started Manual which is available at <http://endnote.com/training/mats/enuserguide/eng/enguide-full.pdf>

This document was first prepared by Associate Professor Dr Victor C.W. Hoe on 26 March 2013 for EndNote X6 and updated for EndNote X7 on 04 March 2016 by Associate Professor Dr Victor C.W. Hoe. The current edition was updated for EndNote X9 on 02 March 2020 by Professor Dr Victor C.W. Hoe.

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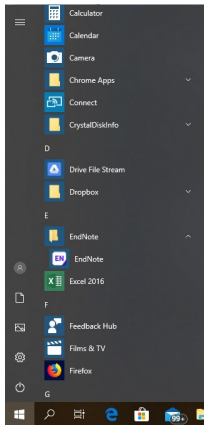
1. Introduction to EndNote X9

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 Mathematicva, and Apple Pages.

Navigating the Library Window

To start EndNote in Windows 10,

Click on the **Start button** → **EndNote** → **EndNote**



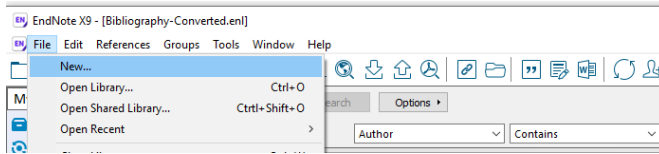
This is the main EndNote X9 windows

The screenshot shows the EndNote X9 interface with several key components labeled:

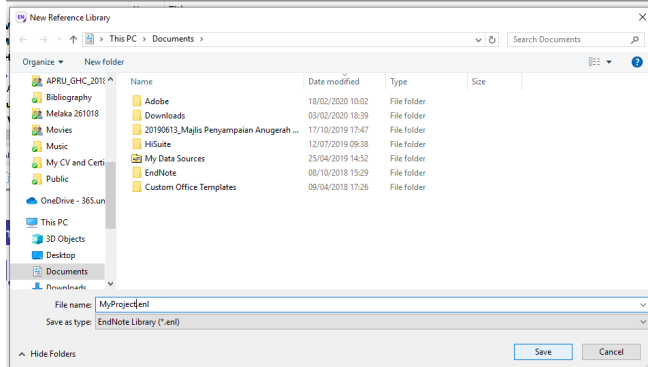
- Menu Bar:** Located at the top of the window, containing File, Edit, References, Groups, Tools, Window, and Help.
- Search panel:** Located at the top right, featuring a search bar and options for search scope and matching.
- Library panel:** Located on the left side, displaying a tree view of libraries and groups, such as 'My Library', 'All References (6974)', and 'My Publication (2555)'.
- Reference List Panel:** The central area displaying a list of references with columns for Author, Year, and Title.
- Tabs panel:** Located at the bottom, showing the active reference and its preview, including the title 'BMJ Open Factors associated with healthcare workers willingness to participate in disasters: a cross-sectional study in Sana'a, Yemen'.

Creating a new EndNote Library

- From **File** menu, located on the **Menu Bar**, select **New**.



- Name the file and Save it to a location of your choice.

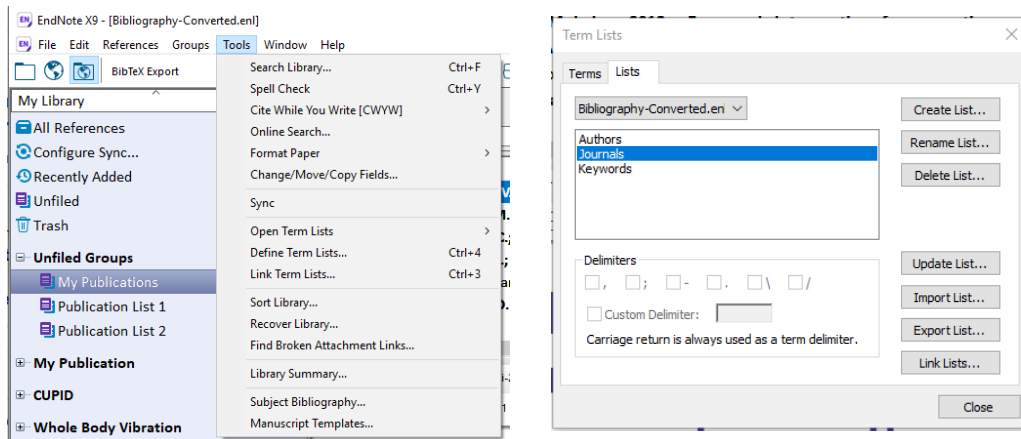


2. Journals Term List

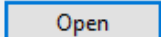


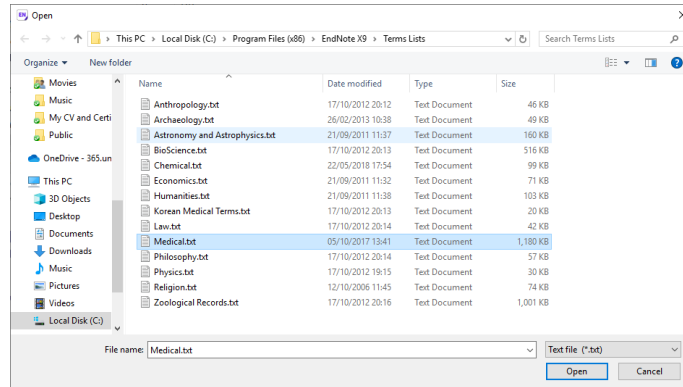
Before entering references in your EndNote library, consider importing “medical journals term list.” This allows you to use output styles that require either full title or abbreviation.

- Under **Tools** menu, select **Define Term Lists** OR press **Ctrl +4**
- Click on **Journals**



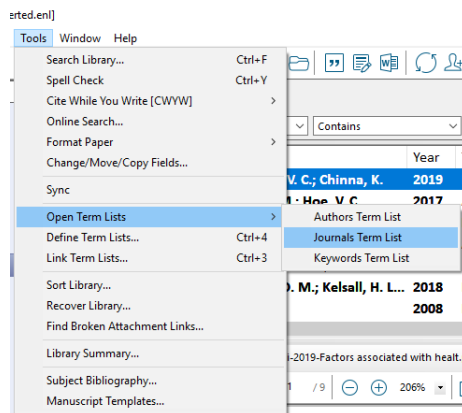
- Click on **Import List...**

- Open the **Term Lists** folder. It is located in the location where the EndNote X7 software was installed. For Windows 7, it will be located at “C:\Program Files (x86)\EndNote X9\Terms Lists”.
- Open the **Medical.txt** file.
- When import is completed, click 

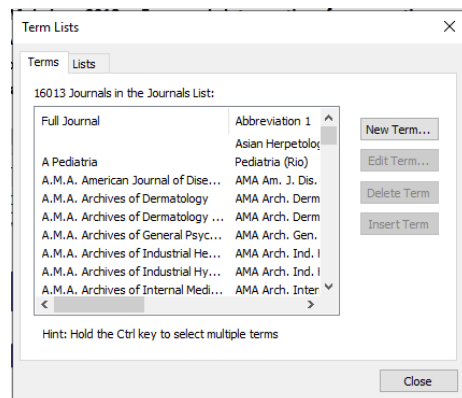


Sometimes you will need to add New Term, Edit Term or Delete Term in the Journal Term List for Journals that are not in the list. To do this:

- 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.





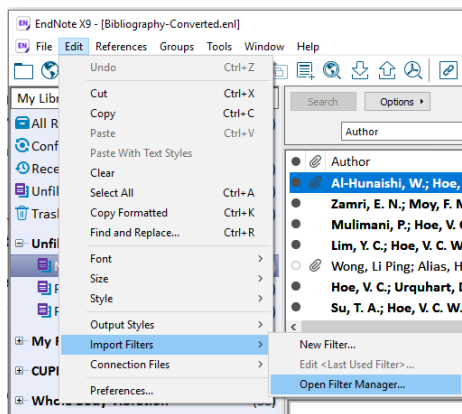
3. Selecting the Correct Format and Filter

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

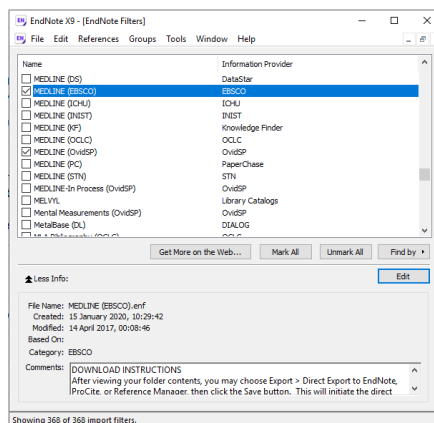
Note: Filters are used to interpret the data in the file exported from the online Databases.


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.



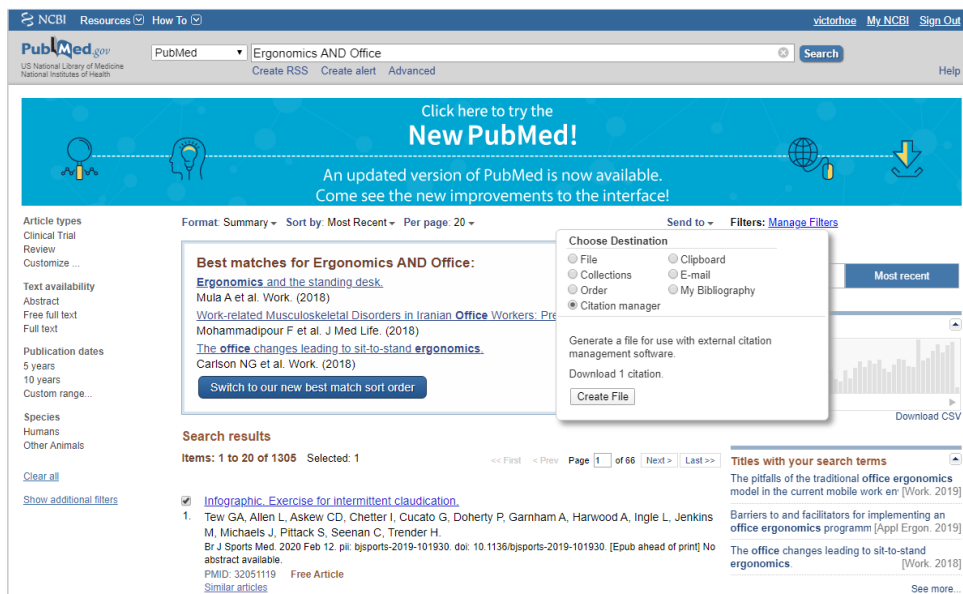
- Close the window, click on the  at the upper right corner
- You may select other filters if you search using other databases.

4. Importing References into Endnote



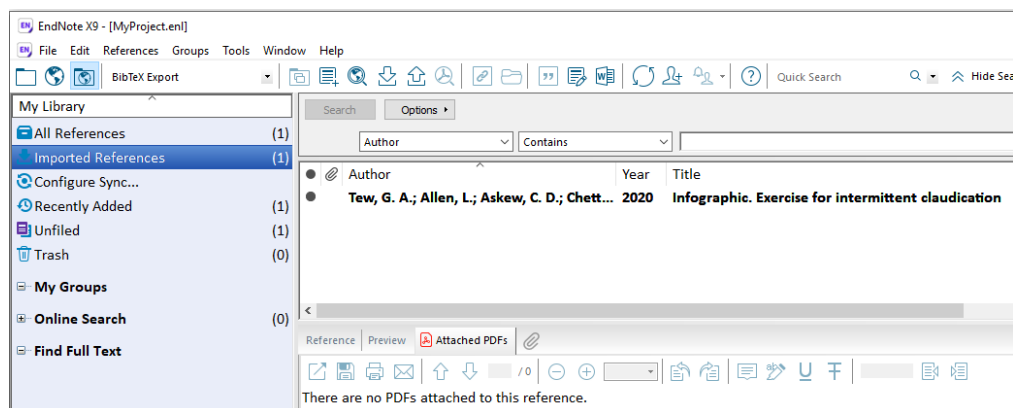
PubMed Citation

- Search the articles in PubMed; <https://www.ncbi.nlm.nih.gov/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




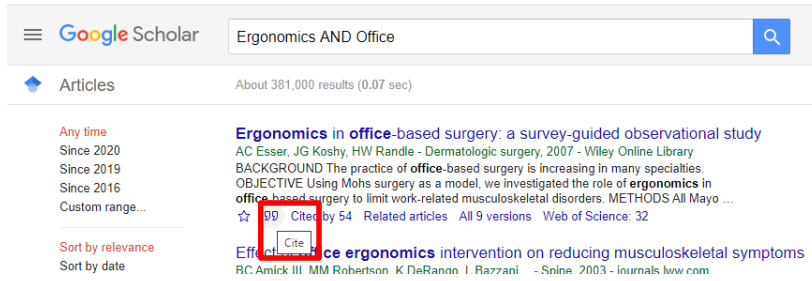
- Open the downloaded file (the name would be *citation.nbib* if that is the first file in your download folder);
 - If the EndNote program is Close, this will open the EndNote programme
 - If the EndNote program is Open, the citation will appear in the Imported References tab.

Note: When importing citation the EndNote X7 program need to be on the main page, i.e. pop-up menu or citation page should be closed.



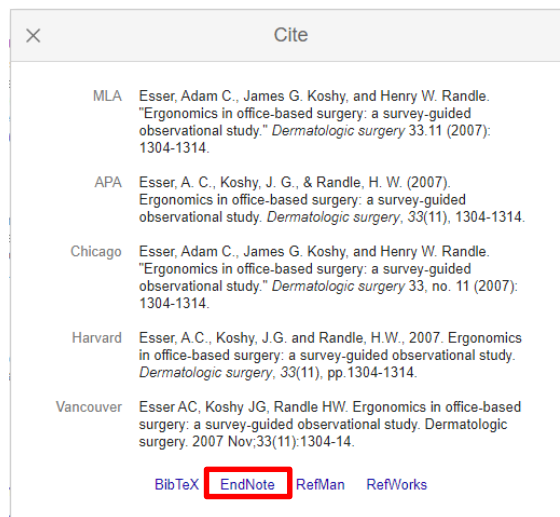
Google Scholar Citation

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



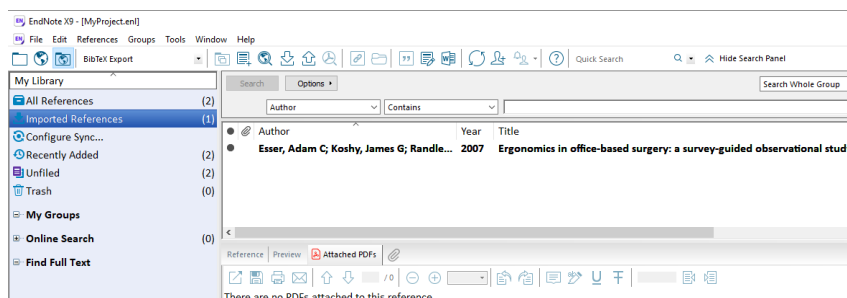
A pop-up window appears

- Select **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 X9 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; use DIRECT EXPORT.

5. Editing a reference

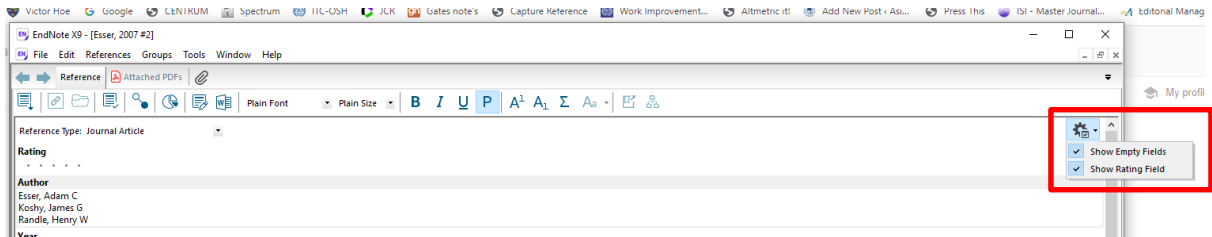


There are two ways to edit a reference

- 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 **Refs panel**.

To add additional information in any of the empty fields

- Click on **Show Empty Fields** to show the empty fields

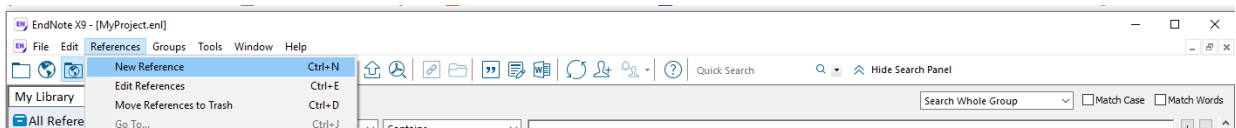


- Then add information in the desired fields.

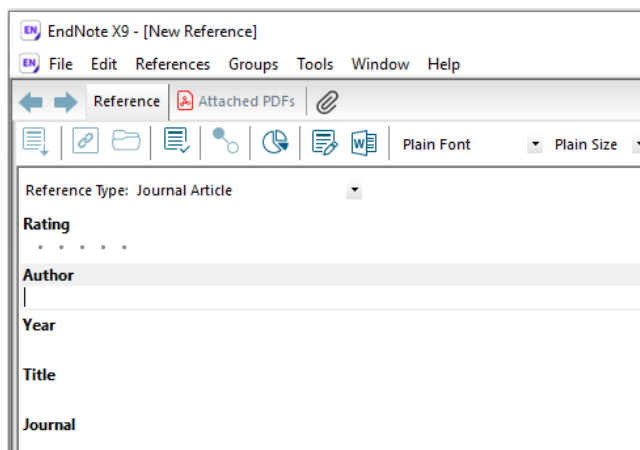
6. Adding References Manually



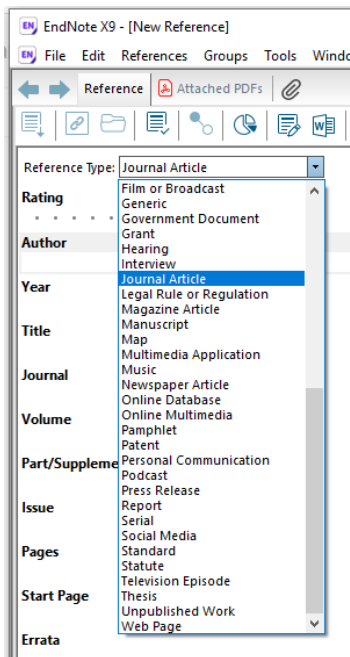
- Open your database, click on **References** → **New Reference**,



- a new window will appear



- Select the **Reference Type** (default is Journal Article) you want to Add



- **Author**; use a standard format for authors. It is advisable to enter the names in full, do not use initial for the First name and other name, as this will be done automatically according to the citation style that you choose
 - Doe, John Damien (Last, First name)
 - Enter author's name one per line with no ending punctuation; just hit return

When the reference does not have an individual author 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, (Last, First name - missing)
- **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

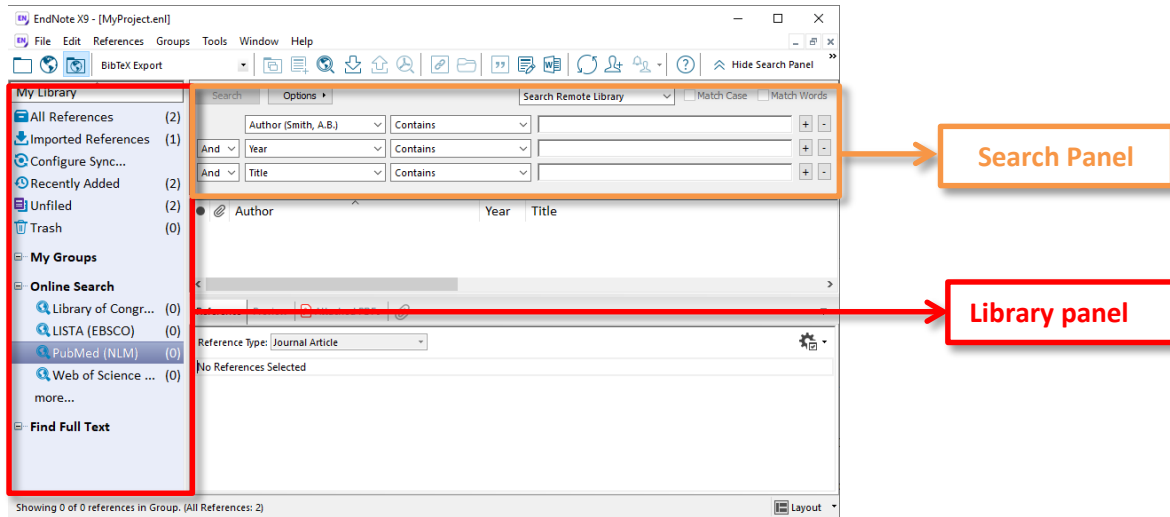
Note: Important - do not add an ending period or extra punctuation in all fields

7. Search Remote Databases

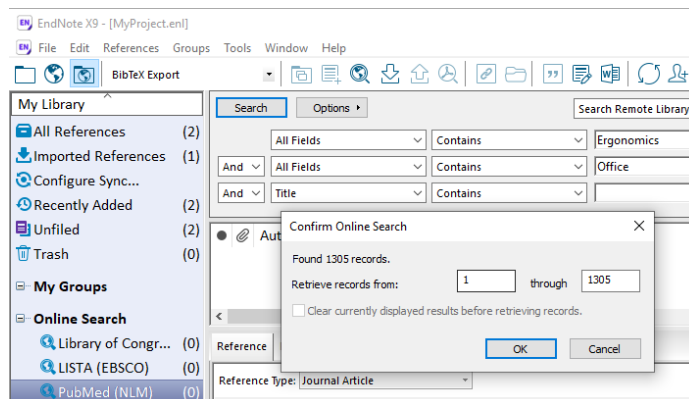


To search PubMed directly from EndNote

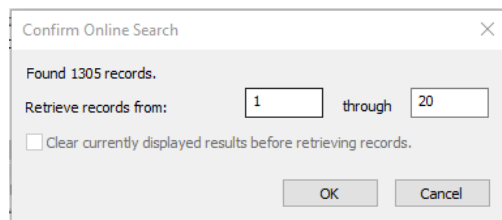
- On the **Library Panel** select the **PubMed (NLM)** on the **Online Search** sub-menu
- Enter your search terms on the **Search Panel** as you would do on the PubMed website



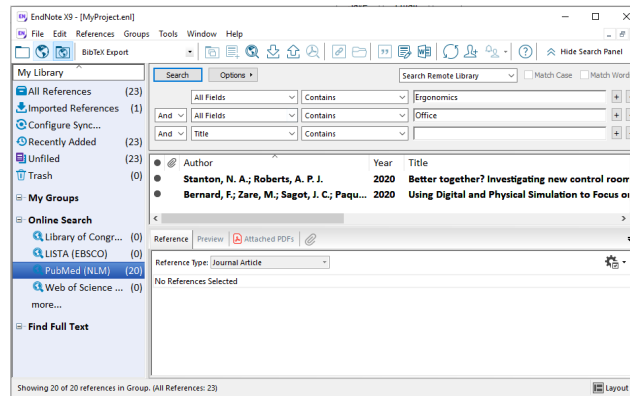
- Enter the terms in the **Search Panel** and click **Search**



- Select and retrieve the record you want, then Click **OK**.



- The **PubMed (NLM)** tab in your **Library Panel** shows the number of results retrieved
- You may view, edit and delete these results.

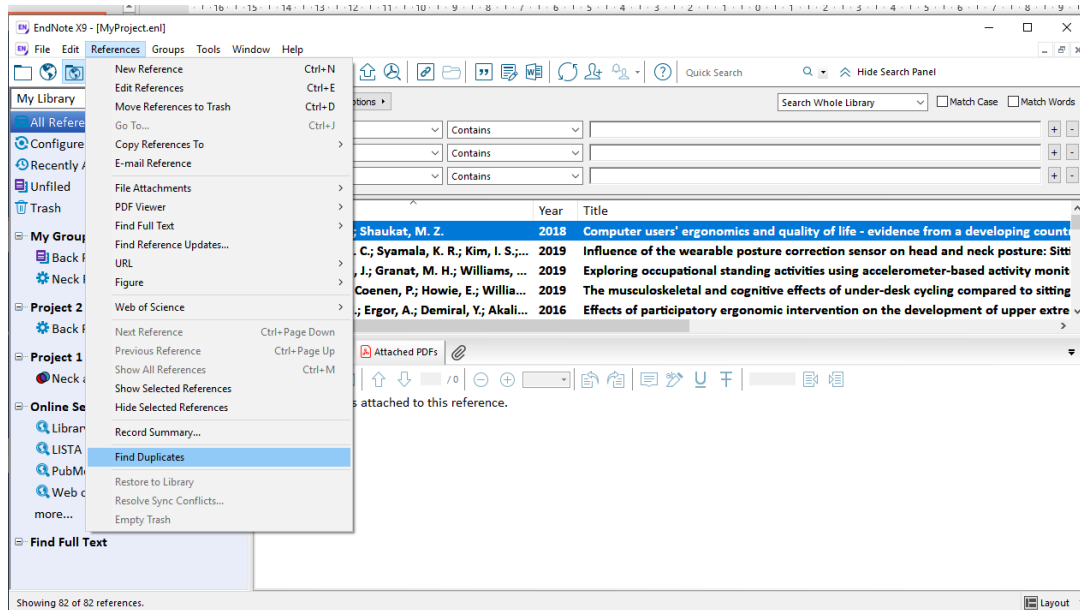


8. Finding Duplicate References

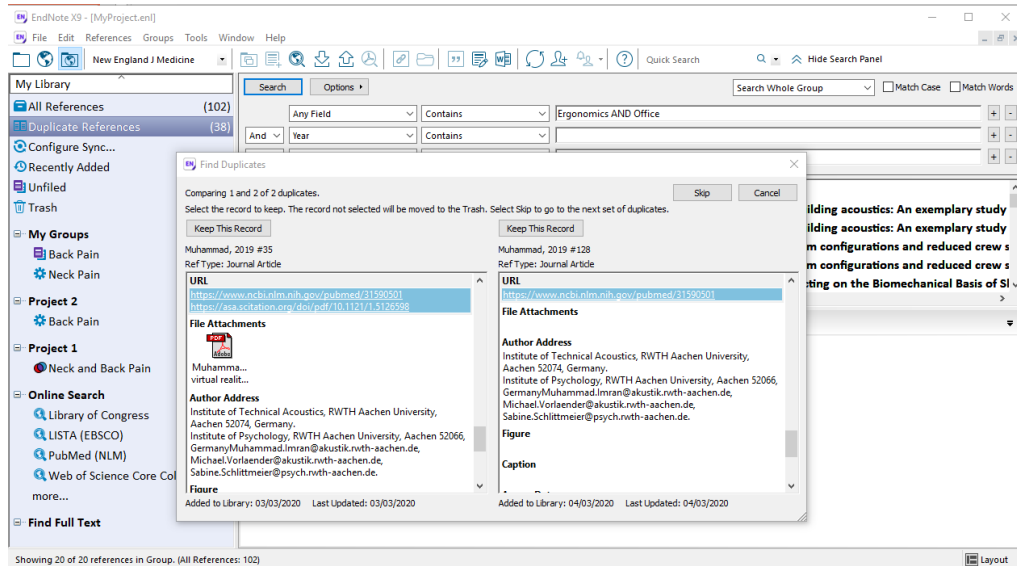


To find duplicate references in your EndNote Library

- First select the folder from the My Library Panel where duplicates references may be located. You can select the All References folder from My Library Panel.
- Click on **References** → **Find Duplicates**



- The duplicate references will appear in the Duplicate References folder in My Library.
- A pop-up menu will also appear that show you the duplicate references.
- Compare the two references to see which you want to keep.
- To keep the record, click on the **Keep This Record** button.

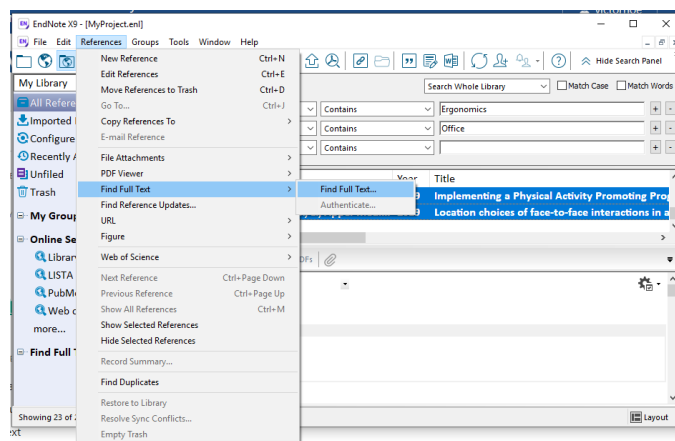


9. Finding for Full Text articles

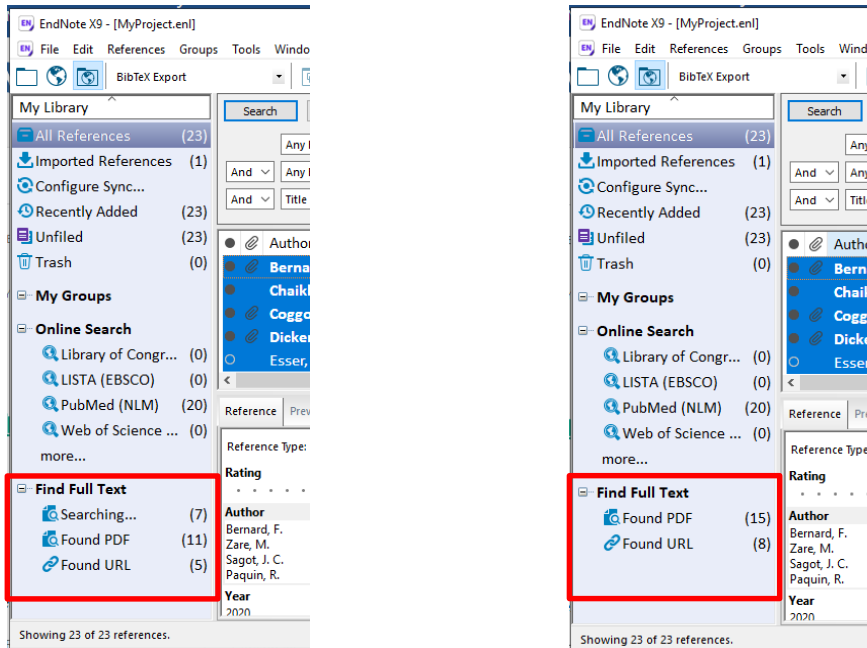


To find full text of the references that you have retrieved

- 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**

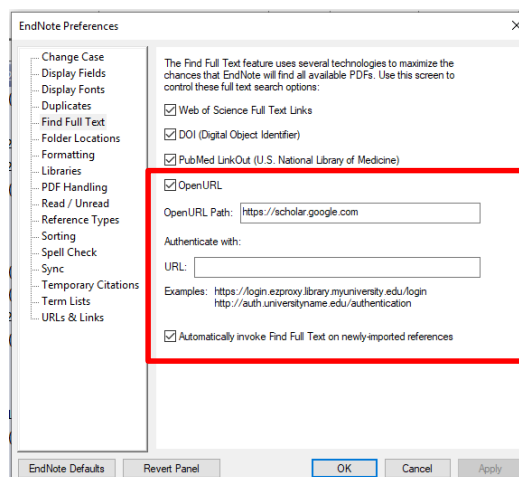


The *EndNote X9* will search for the full text article online and will retrieve it one at a time. You will be able to track the progress of the search on the **Library Panel** under the **Find Full Text** tab.



In *EndNote X9* there is an option for “Find Full Text” on all newly-imported references options.

- Click on **Edit** → **Preferences** → **Find Full Text**
- Select the “Automatically invoke Find Full Text on newly-imported references” option
- To search Google Scholar, Select OpenURL, and include the Google Scholar web address in the OpenURL Path: <https://scholar.google.com>



10. Creating a Groups



You may use **Groups** to organise your references according to projects, papers you are writing or thesis chapter (for example Introduction, Discussion, etc.). A single record can be included in more than one **Groups**.

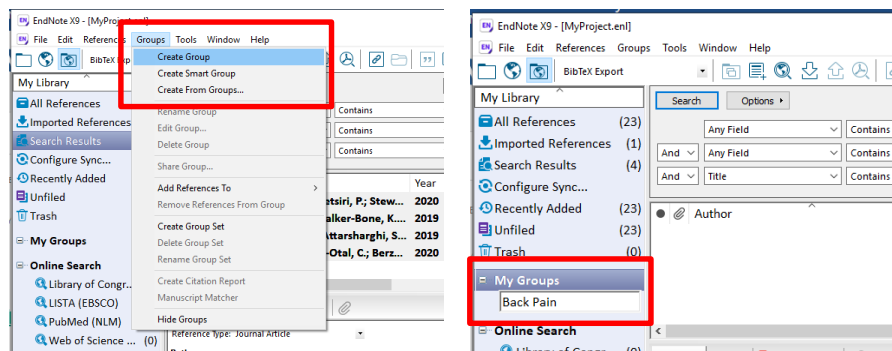
There are mainly three types of **Groups** in *EndNote X7*, **Group**, **Smart Group** and group of groups (**Create from Groups**).

Group are static collection of references; i.e. the references in the **Group** 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 imported references matched the search terms.

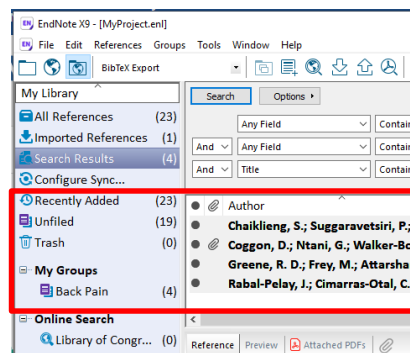
Creating a Group

- Select **Groups** → **Create Groups**
- Enter the name of the **Groups** in the **Groups** tab under **Library Panel**



Adding References to the Group

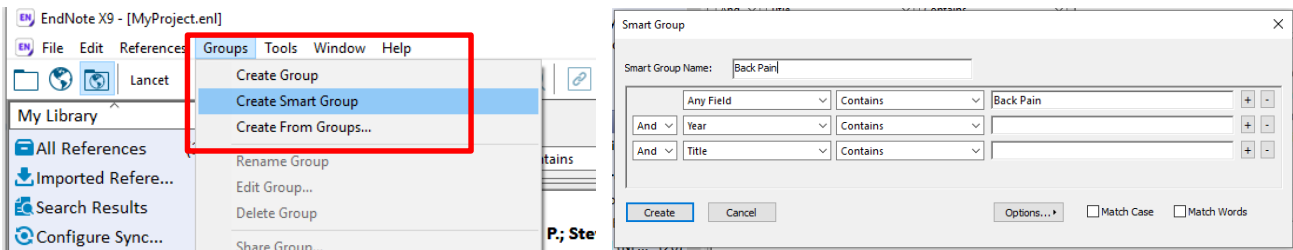
- Select the references to be added to the **Group** from the **Reference List Panel** and then Drag and Drop those references into the **Group** in the **Library Panel**.



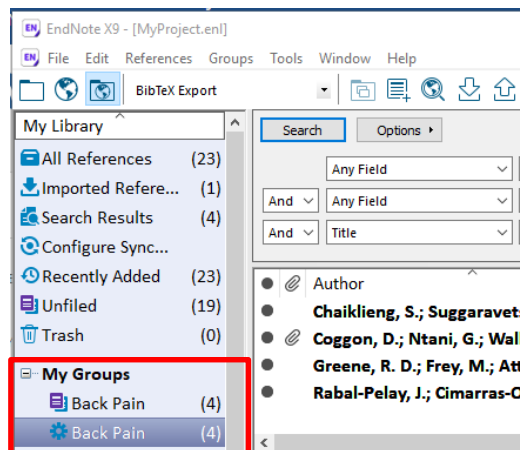
Creating Smart Groups

- 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** tab in the **Library Panel**.

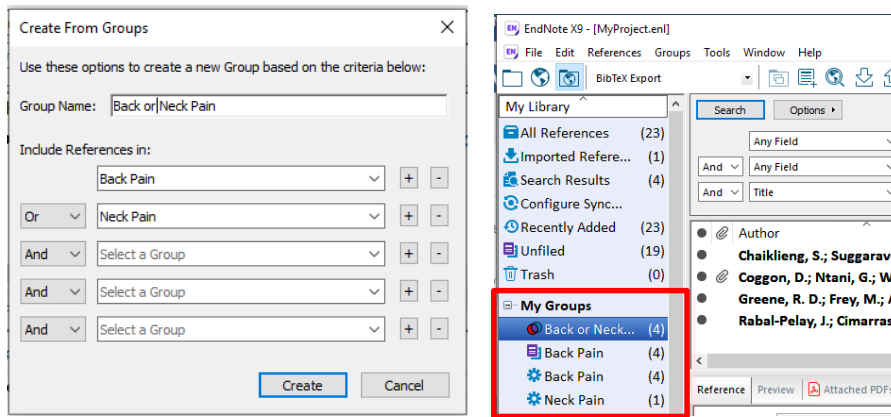


Create From Groups

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

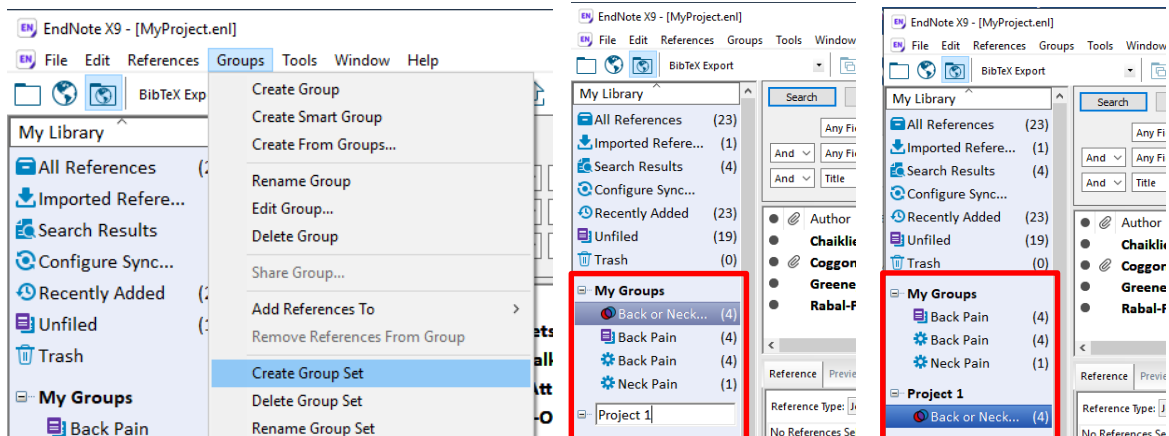
Note: Before we start the exercise, 160 more articles have been added to the Library and three more Smart Groups have been created. You will notice that the number of records in the Prevalence Study Smart Group have increased from 4 to 13. This is an automated process when more article are added into the library, those that matched the criteria of the Smart Group will be included.



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 **Library Panel**.
- You may now **Create** new **Groups** for the new **Group Set** or **Drag and Drop** existing **Groups** into the **Group Set**.

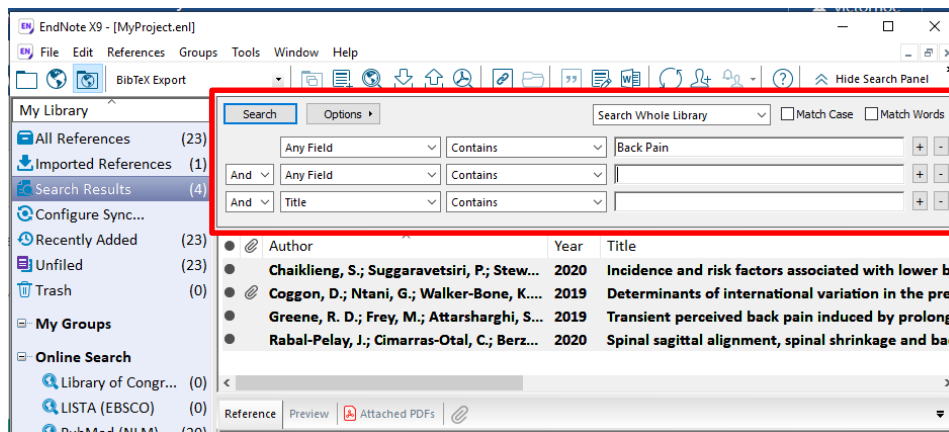


11. Searching References in EndNote Library



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 are also be applied here.

- Click on the **All References** (to search the entire library) in the **Library Panel** to search all references in your library or click on specific **Group** to search references within the group.
- Perform the search in the **Search Panel**; e.g., Search for 'Back Pain'
- Enter those terms in the **Search Panel** and click **Search**



The number of records found is displayed on the **Search Results** tab in the **Library Panel**

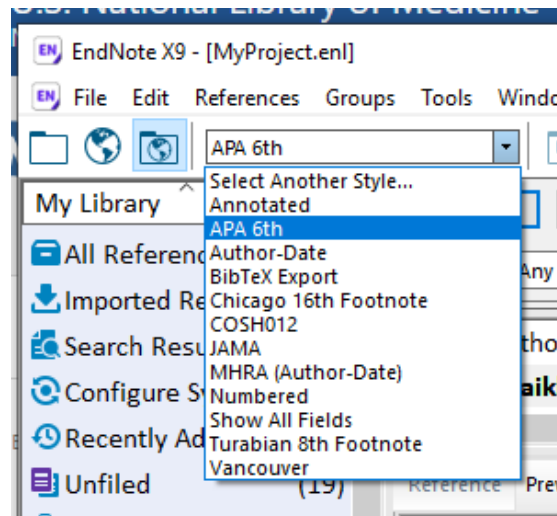
12. Selecting citation style



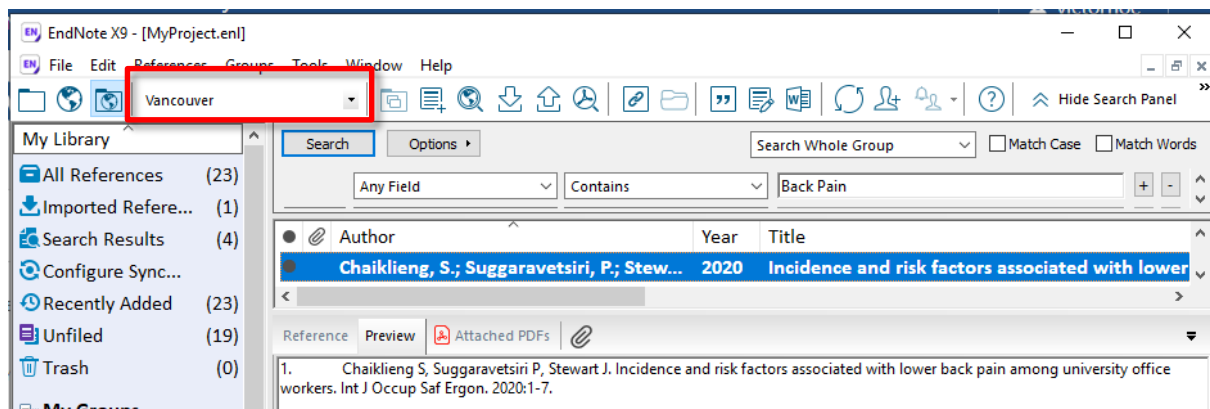
There are many different type of citation style available. The criteria for selecting a specific citation style will depend on the requirement of the journals, publishers or in the case of a Thesis, your University. The advantage of using a bibliography software like EndNote is the simplicity in changing 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**.

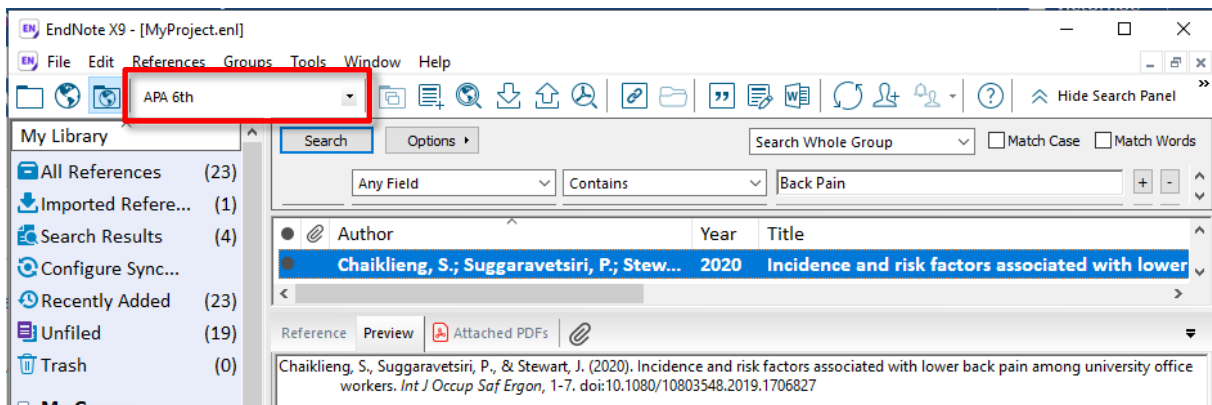
- Select the **Preview** tab on the **Tab Panel**. The citation style shown below is APA style.
- To change the Citation Style select the desire style from the Style Dropdown Menu



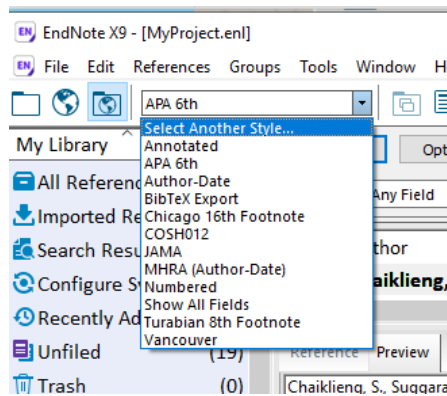
- Vancouver Style



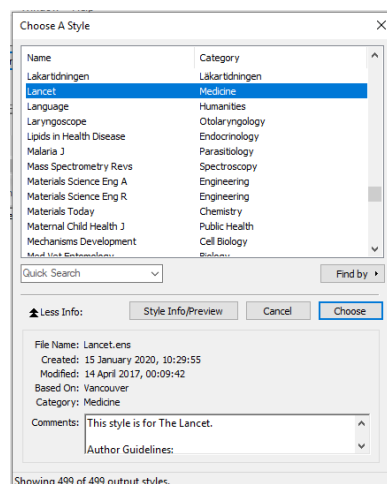
- APA 6th Edition



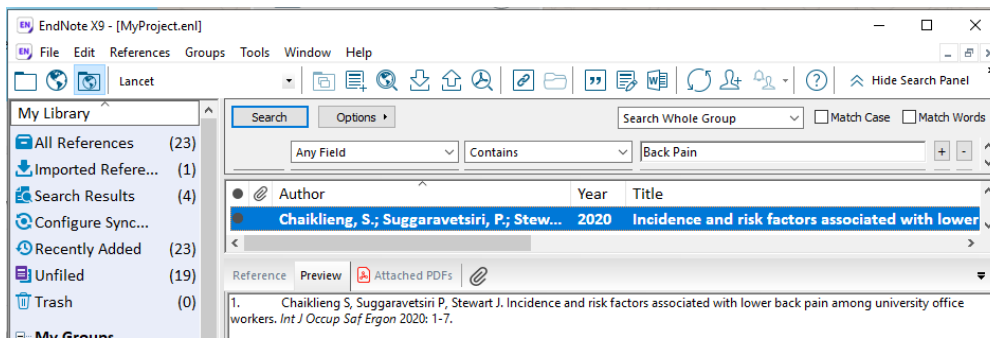
- If the desired style is not available on the Style Dropdown Menu, click on **Select Another Style**



- For instance, if you are going to submit an article to Lancet, you would like to select their citation style.
- Select the **Lancet** style from the **Choose A Style** pop-up menu, then click **Choose**.



- The style on the **Preview tab** will change to reflect the **Lancet** citation style.

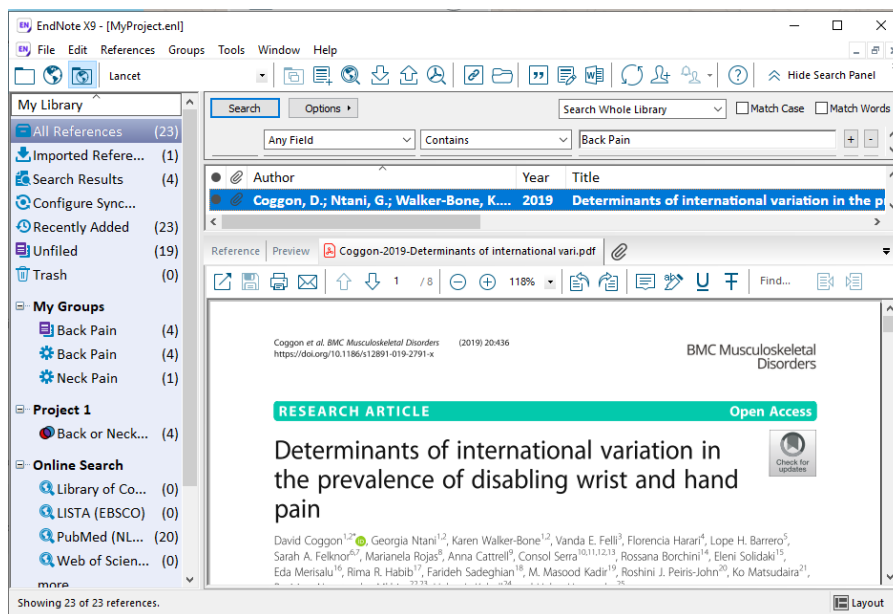



13. Previewing and annotate PDF documents

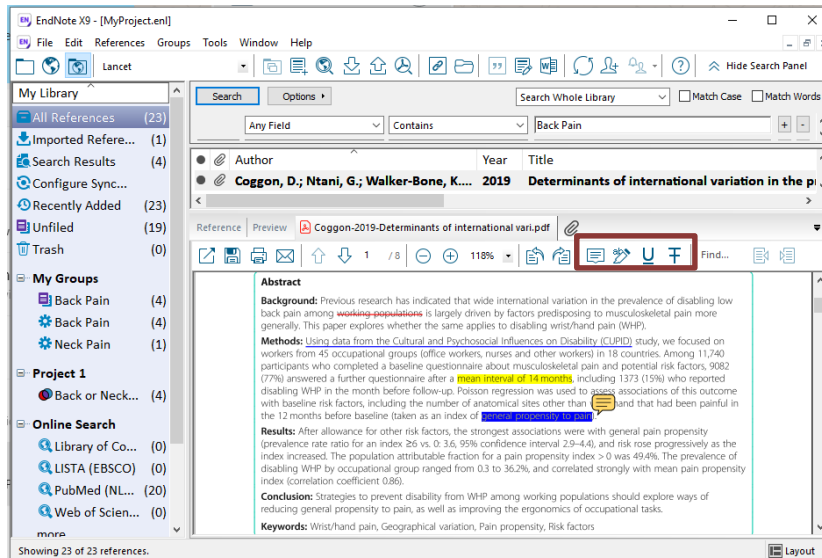


Starting from EndNote X5 you are able to preview PDF documents attached to the references directly in EndNote.

- Click on the PDF document in the **Tab panel** to preview the document



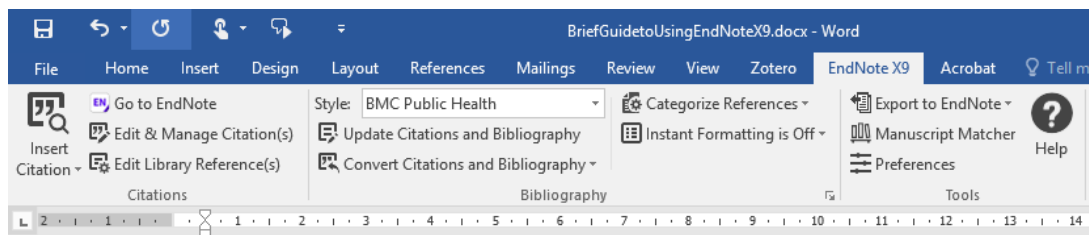
- You will also be able to annotate the PDF document using the available tools from the tool bar – 
- This is useful to put highlight and notes on the PDF document related to your Projects.



- To view the PDF in full screen, click on  the button.

14. 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 X7* ribbon is visible in your Microsoft Word document.

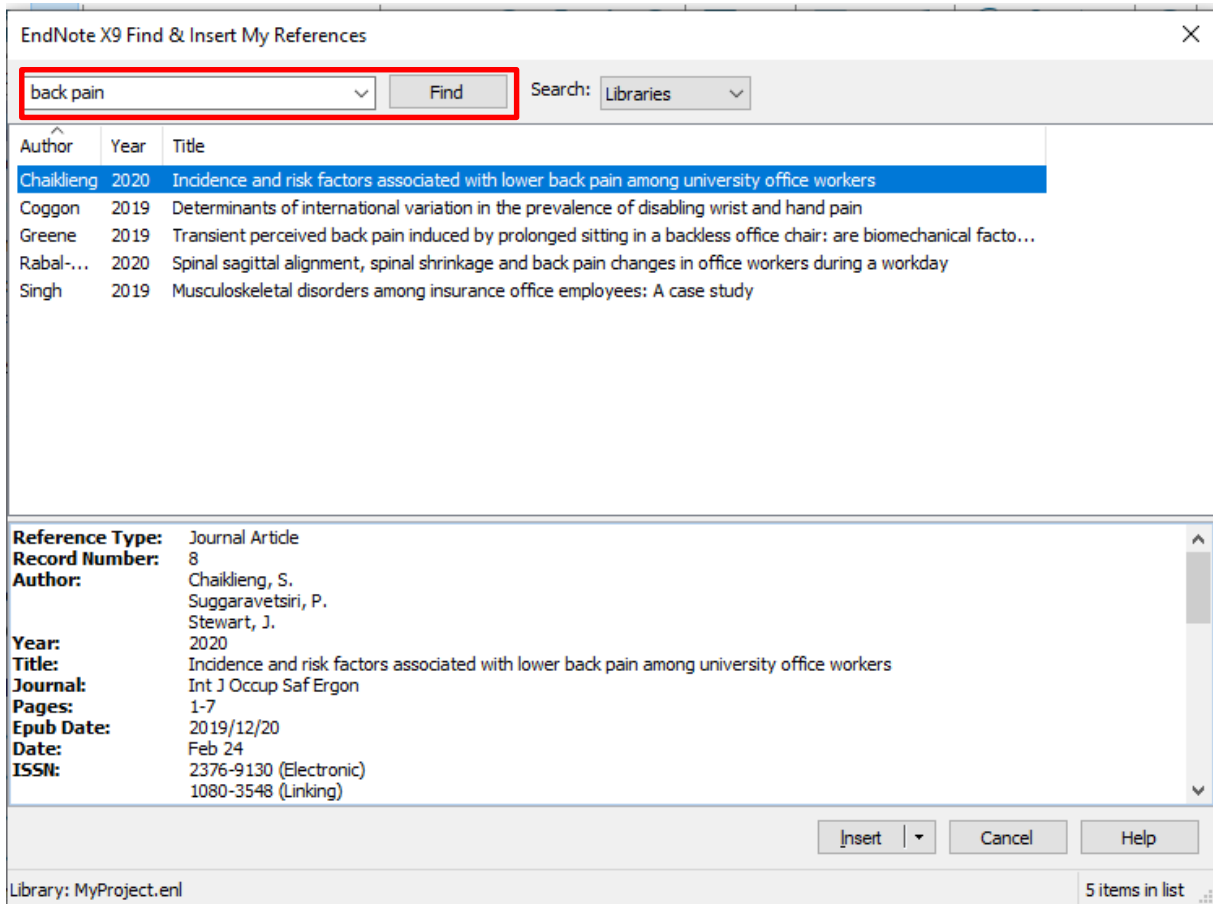


If this is not visible, please read the *EndNote* manual or contact your IT administrator to troubleshoot the problem.

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**

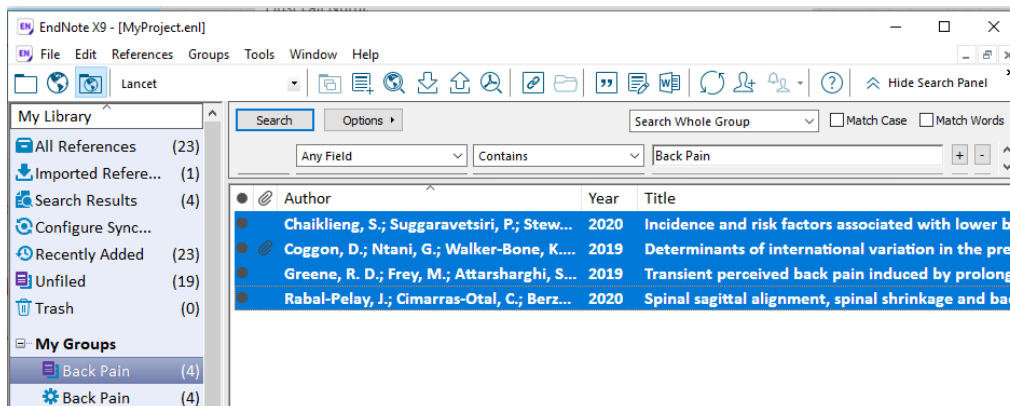
- Search for your reference, enter the search term in the search box then click **Find**



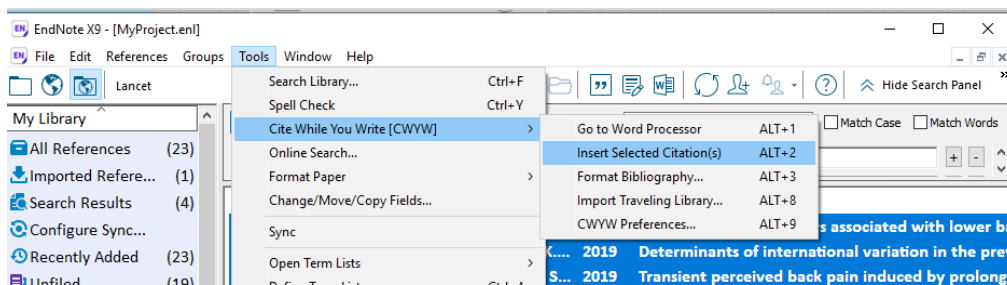
- Select the reference you wish to insert and click **Insert**.
- To select more than one reference, hold down the **CTRL** key on your keyboard while you click on each reference.

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.



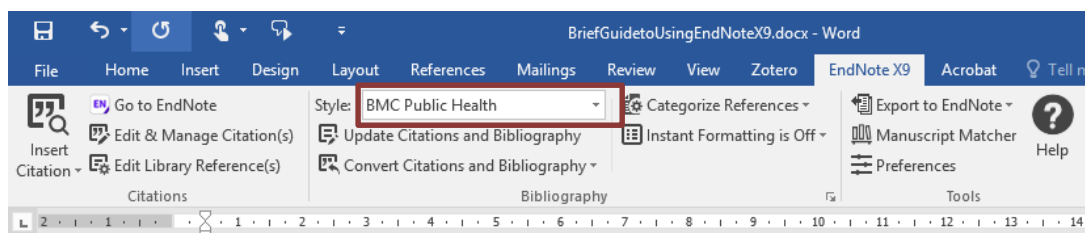
- Select **Tools** → **Cite While You Write (CWYW)** → **Insert Selected Citation(s)** OR click **Alt+2**



15. Changing 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:

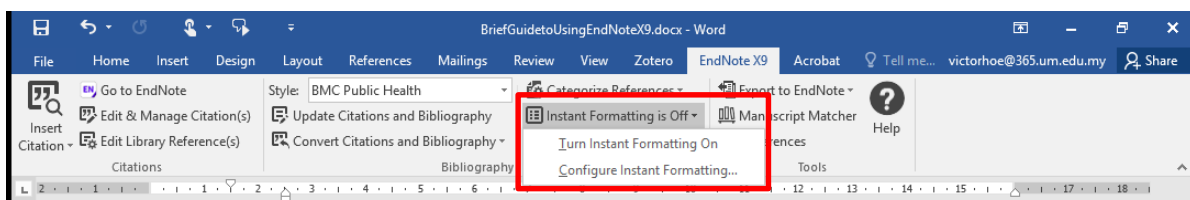
1. **BMC Public Health:** [1, 2]
2. **APA:** (Bartenbach et al., 2013; Fasoli, Ladenheim, Mast, & Krebs, 2012)
3. **Vancouver:** (1, 2)

16. Understanding Instant Formatting



It is a good practice to turn off **Instant Formatting** during writing or editing as this will increase the speed of the Microsoft Word programme and reduce the disturbance to your document style. When **Instant Formatting** is turned 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 on and off **Instant Formatting** on click on the **Instant Formatting** tab in the **Bibliography** pane on the **EndNote X9** ribbon to review the different options.



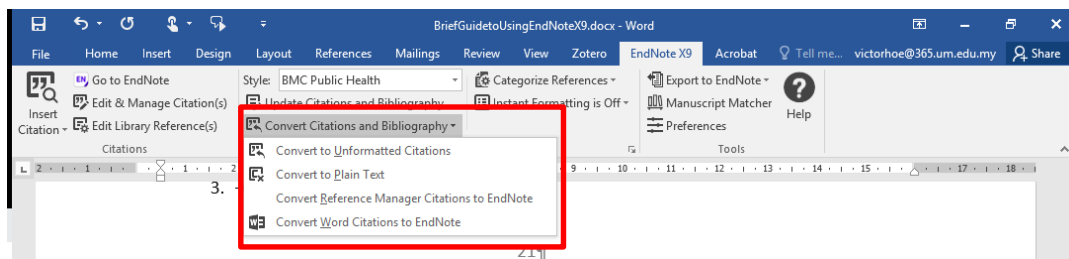
Convert Citations and Bibliography

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

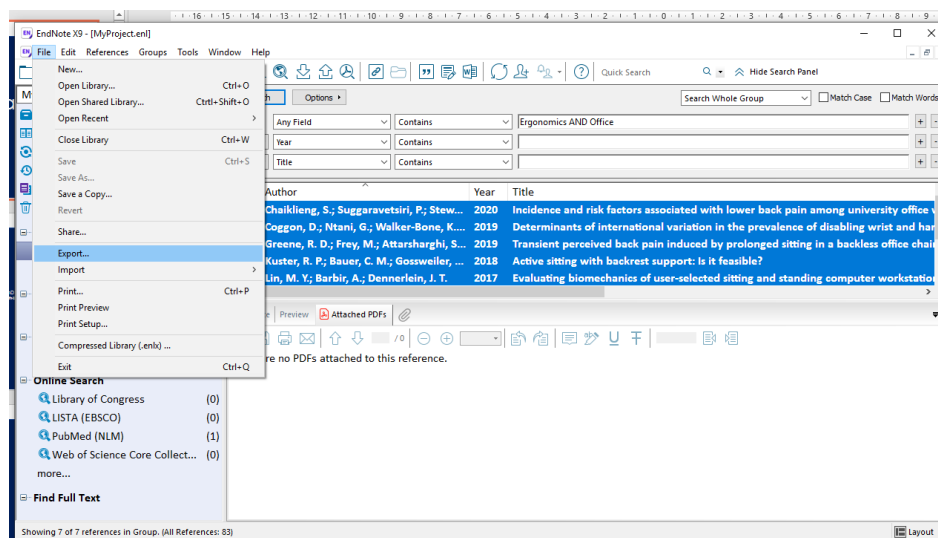


- Then click on the Convert to Unformatted Citation or Convert to Plan Text.

17. Exporting Selected References

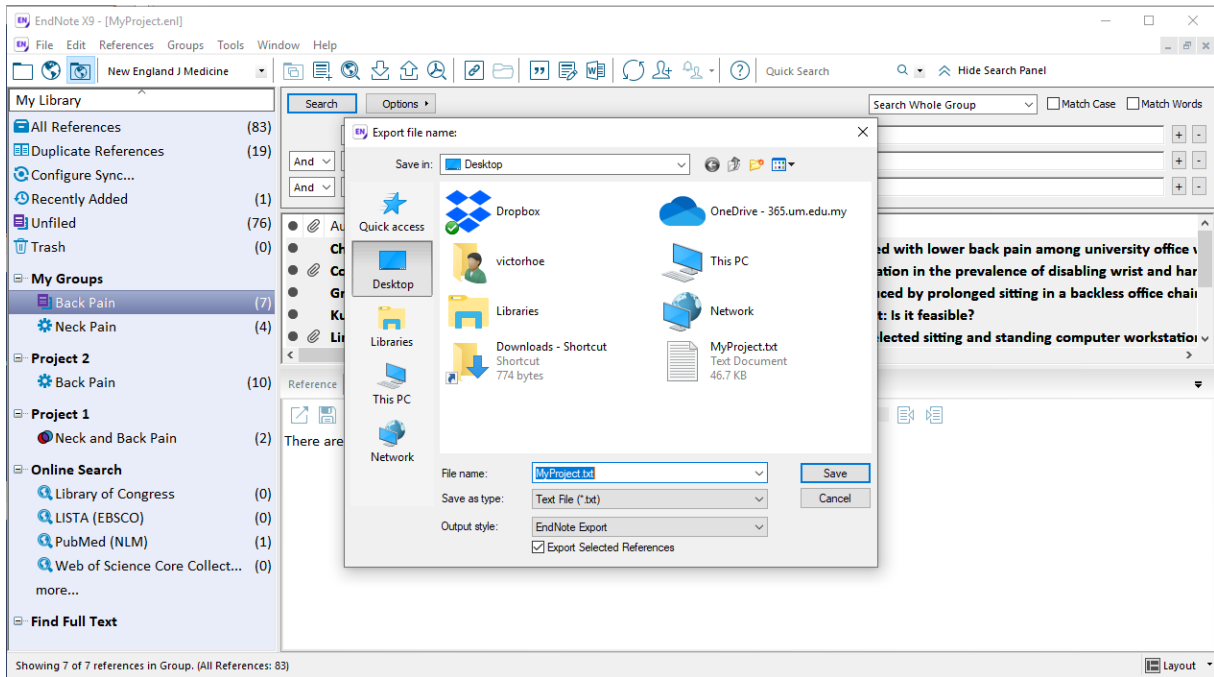


- To export selected references, first you need to select the references. To select more than one reference, hold down the **CTRL** key while you click on each reference.
- Select **File → Export ...**



A pop-up window will appear.

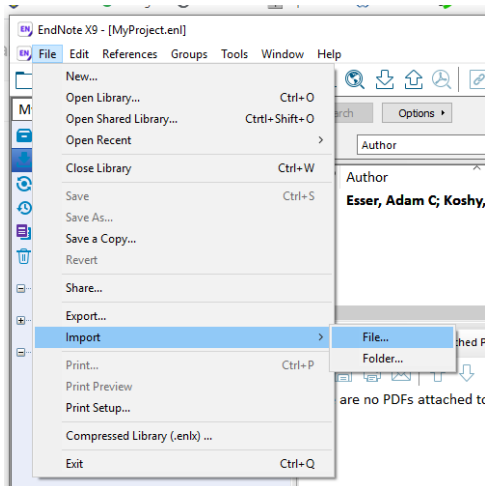
- Select the location to Export your file.
- Enter the File name and Select the Output style. The Output Style will depend on what you want to do with the data. If you want to share with your Supervisor or co-Researcher who also uses EndNote, choose the EndNote Export output style.
- Click Save to save the file containing the reference data.



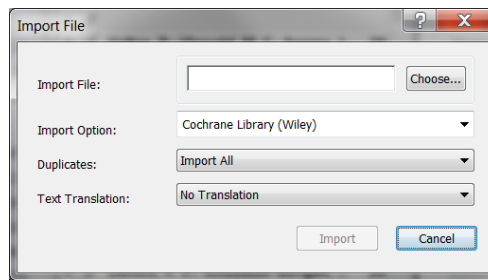
18. Importing a Reference File

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 the database from which you have downloaded your citations

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

Import all

Discard duplicates

Import into Duplicate Library - EndNote will create another library with same names as yours, plus the duplicates. 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 have selected the correct **Import Option**.
- Your citations will now appear in the **Imported References** tab.