

INTRODUCTION TO
ENDNOTE
X9

CONTENTS

About EndNote.....	4
Obtaining and Installing EndNote.....	4
Guides	4
Creating a New Library.....	5
Making a Backup Copy of a Library.....	5
Selecting a Library Window Layout.....	6
EndNote Preferences.....	7
Find Full Text Preferences.....	7
Automatically Discard Duplicate References	7
Journal List.....	8
Manually Entering References.....	9
Exporting References from PubMed to EndNote.....	11
Exporting one reference from PubMed.....	11
Exporting one or multiple references from PubMed.....	12
Importing a File of References from PubMed	13
Exporting References from Web of Science to EndNote.....	15
Searching PubMed from within EndNote.....	16
Searching Other Online Databases from within EndNote	17
Online Search Mode.....	18
Importing PDF Files to Create New References	19
Searching an EndNote Library.....	20
Quick Search.....	20
The Search Panel.....	20
Managing and Organizing References	21
Sorting References	21
Finding Duplicate References.....	21
Editing References	21
Updating References	22
Deleting References	22
Custom Groups	22
Smart Groups	23
Group Sets.....	23
Printing References.....	23

Creating an Independent Bibliography.....	24
Exporting References.....	24
Finding Full Text for a Reference	25
OpenURL Link	25
Using EndNote While Writing in Word.....	26
Inserting Citations	27
Generating a Bibliography	28
Selecting a Different Output Style	28
Adding Styles to the Output Styles List.....	29
Editing Citations	30
Deleting Citations	30
Editing a Reference.....	31
Unformatting Citations	31
Removing Field Codes.....	32

ABOUT ENDNOTE

EndNote is a reference management program. You can use EndNote to create your own personal reference library. You can then insert citations in a Word document and generate a bibliography in the citation style you require.

OBTAINING AND INSTALLING ENDNOTE

NTNU has a site licence for EndNote, which permits staff and students of the university to use the program both at work and at home. Contact *Orakeltjenesten* if you have any enquiries about installing EndNote.

GUIDES

- The EndNote YouTube channel contains several guides
<https://www.youtube.com/user/EndNoteTraining>
- NTNU University Library, Medicine and Health Library offers guides and tips
<https://www.ntnu.no/blogger/ub-mh/en/endnote-zotero/>

CREATING A NEW LIBRARY

From EndNote's **File** menu, choose **New**.

Select the location where you would like to save your library. Enter a name for the library and click [Save].

Do not store the library on a cloud service like Dropbox or OneDrive. This might lead to library corruption.

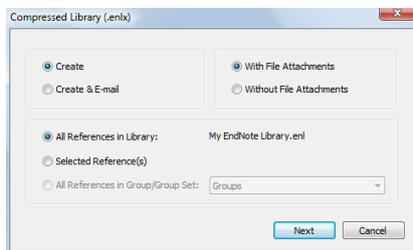
Note that the library is made up of both an .ENL file and a corresponding .DATA folder.

It is recommended that you maintain one library only.

MAKING A BACKUP COPY OF A LIBRARY

Open the library in EndNote.

From the **File** menu, select **Compressed Library (.enlx)**.



Make sure that the options With File Attachments and All References in Library are selected.

Windows: Click [Next].

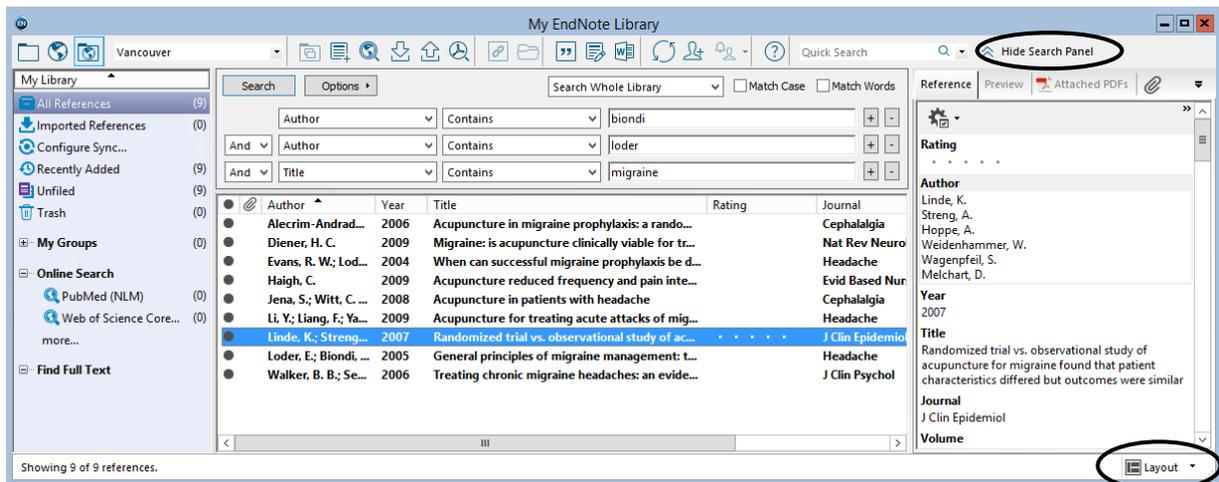
Mac: Click [OK].

Choose the location where you would like to save your backup copy. Enter a name and click [Save]. The backup copy includes both the .ENL file as well as the corresponding .DATA folder.

SELECTING A LIBRARY WINDOW LAYOUT

The Library window includes several work areas, such as the Groups panel and the Reference List panel.

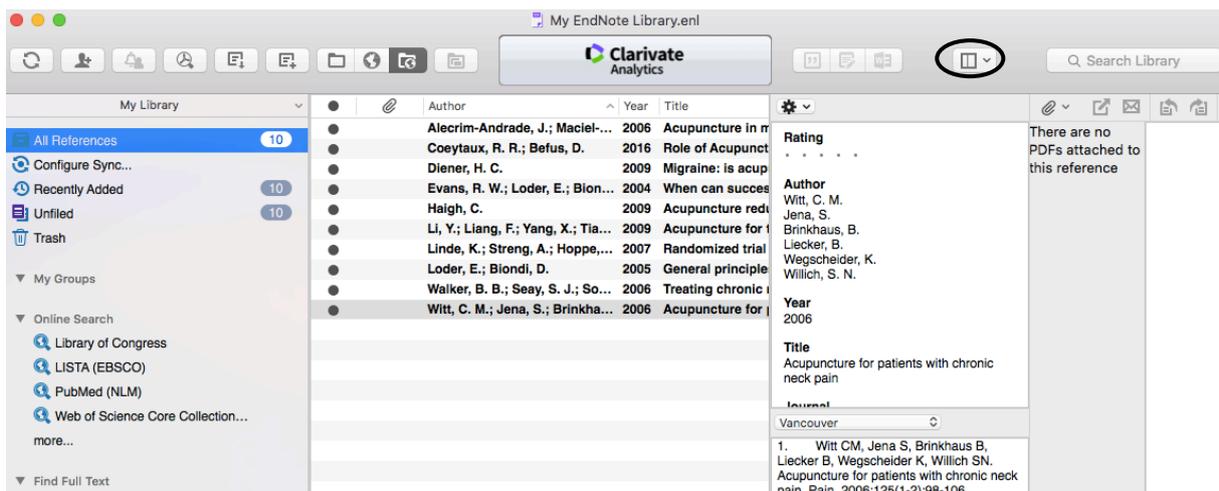
Windows:



Click the **Layout** button in the lower right-hand corner of the library window to change layout options to match your preferences.

Click the **Show Search Panel** and **Hide Search Panel** buttons to toggle between the two views.

Mac:



Select the layout view of the library window from the layout menu located in the upper right-hand corner.

Select **Show Search** and **Hide Search** from the layout menu to show and hide the Search panel.

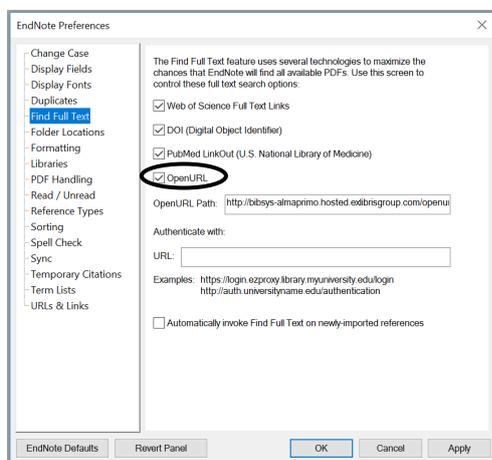
ENDNOTE PREFERENCES

Windows: From the **Edit** menu, choose **Preferences** to access EndNote preferences.

Mac: From the **EndNote X9** menu, choose **Preferences** to access EndNote preferences.

FIND FULL TEXT PREFERENCES

Select the **Find Full Text** panel.



Select the OpenURL, Web of Science, DOI and PubMed check boxes.

To search NTNU University Library, enter the following OpenURL path:

http://bibsyst-almaprmo.hosted.exlibrisgroup.com/openurl/NTNU_UB/NTNU_UB_services_page

Windows: Click [OK].

Mac: Click [Save].

AUTOMATICALLY DISCARD DUPLICATE REFERENCES

Display the **Duplicates** panel.

Under Online Search Results, select the check box to automatically discard duplicate references when retrieving references from an online database.

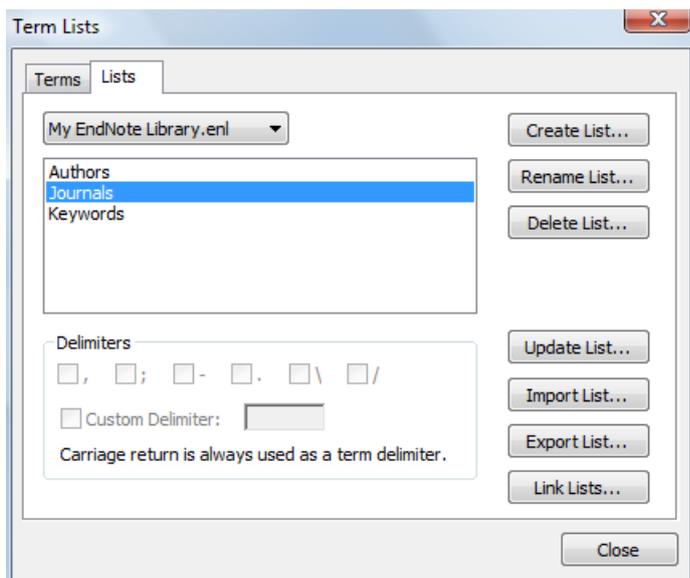
The duplicates are never inserted into the library.

JOURNAL LIST

EndNote provides several lists of journal names and abbreviations that can be imported for use with your EndNote library.

Open the library in EndNote.

From the **Tools** menu, choose **Define Term Lists**.



Click on the **Lists** tab and highlight **Journals**.

Click [Import List].

Navigate to the journal lists folder.

Mac: The journal lists folder is named Terms. By default, the location is Applications\EndNote X9\Terms

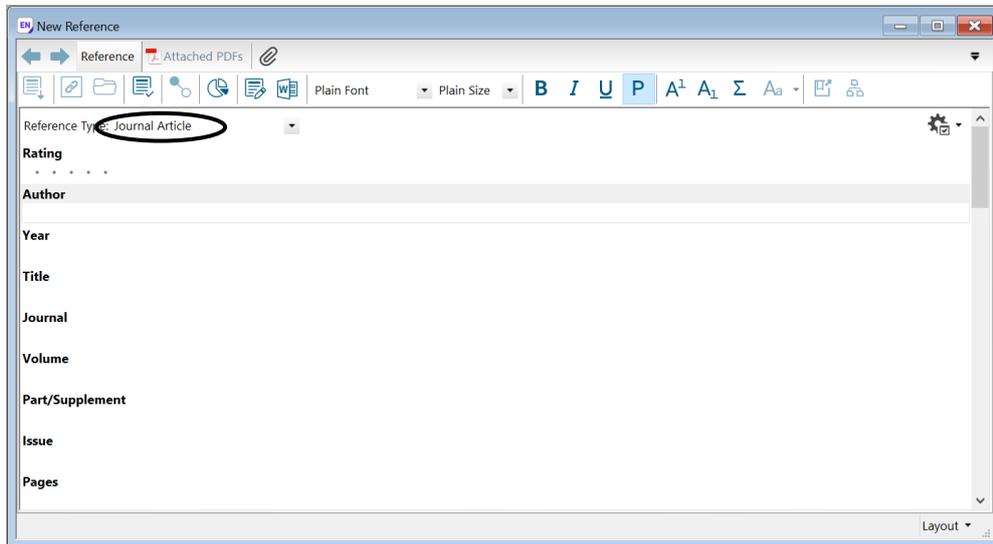
Select the file **Medical** in the journal lists folder to import the list for medicine.

Select the Terms tab to see the list of full journal names and their matching abbreviations.

Do not import more than one journal list, and import the list before entering references.

MANUALLY ENTERING REFERENCES

From the **References** menu, choose **New Reference** or click on the  button to add a new reference to an open library.



Choose a reference type from the **Reference Type** drop-down list.

Tips for choosing the right reference type:

Journal Article	journal article
Book	books written by one or more authors
Edited Book	books edited by one or more editors
Book Section	part of edited or non-edited books (for example, a chapter)
Web Page	material from a Web page

Enter the bibliographic data into the fields in the reference. Press the TAB key to move to the next field.

Information about a few selected fields:

Author	Enter author names with the last name followed by a comma and the first name. Always enter author names one name per line. Examples:
--------	--

Smith, Mary Elizabeth
Smith, J. R.

When entering corporate authors, put a comma after the name.

Examples:

University of California,
University of California,, Irvine

To accept an author name that EndNote has suggested, press the ENTER or the TAB key.

Journal	Full journal name
Alternate Journal	Abbreviated journal name
File Attachments	Use the File Attachments field to link a PDF file to the reference. From the References menu, choose File Attachments > Attach File and select a file to link to the reference.

Special bibliographic formatting and punctuation should not be included when you enter reference data into EndNote (for example, enter titles without a period or any other punctuation at the end).

Click the close button to close the reference or choose **Close Reference** from the **File** menu.

Windows: Click [Yes] to save the reference.

Mac: Click [Save] to save the reference.

EXPORTING REFERENCES FROM PUBMED TO ENDNOTE

In EndNote you may use the direct export feature to import references from PubMed directly into EndNote. See next page for instructions on how to export multiple references.

EXPORTING ONE REFERENCE FROM PUBMED

Make sure that your EndNote library is open.

The screenshot shows the PubMed.gov search results page. At the top, there is a search bar with the text "migraine acupuncture" and a search button. Below the search bar, there are links for "Advanced" and "Create alert". There are also buttons for "Save", "Email", and "Send to". The search results show 551 results. A bar chart titled "RESULTS BY YEAR" shows the number of results from 1965 to 2020. The first result is "Acupuncture for migraine prevention." by Da Silva AN. The "Cite" button is circled in red.

Perform a PubMed search.

Click [Cite] below the reference that you want to export to EndNote.

The screenshot shows the "CITE" dialog box in PubMed. It contains the citation text: "Da Silva AN. Acupuncture for migraine prevention. *Headache*. 2015;55(3):470-473. doi:10.1111/head.12525". At the bottom, there are buttons for "Copy", "Download .nbib", and "format: AMA". The "Download .nbib" button is circled in red.

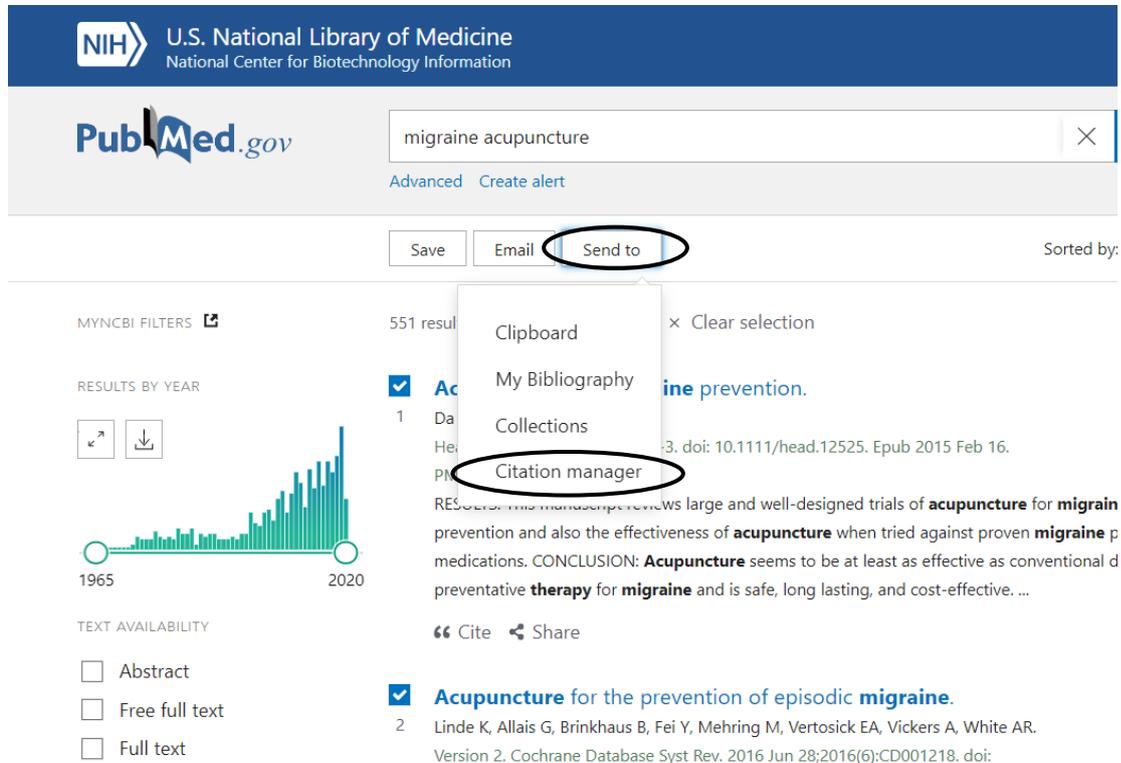
Choose [Download...].

Select the option [Open], if possible. If the reference automatically is saved to a file on the desktop open the saved file.

Peruse the imported data to make sure it imported as expected.

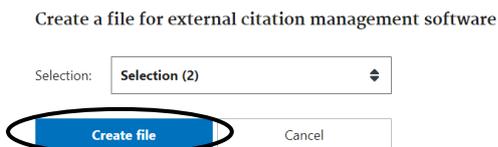
EXPORTING ONE OR MULTIPLE REFERENCES FROM PUBMED

Make sure that your EndNote library is open.



Perform a PubMed search and select the reference(s) that you want to export to EndNote.

From the Send to menu, choose **Citation manager**.



Choose [Create file].

Select the option [Open], if possible. If the references automatically are saved to a file on the desktop open the saved file.

Peruse the imported data to make sure it imported as expected.

IMPORTING A FILE OF REFERENCES FROM PUBMED

You may save PubMed references to a file and then import the file of references into EndNote. Note that direct export (see page 11-12) is an easier way to get data into EndNote because it involves no intermediate steps.

NIH U.S. National Library of Medicine
National Center for Biotechnology Information

PubMed.gov

migraine acupuncture

Advanced Create alert

Save Email Send to Sorted by:

Save citations to file

Selection: Selection (2)

Format: PubMed

Create file Cancel

MYNCBI FILTERS

551 results 2 items selected Clear selection

RESULTS BY YEAR

Acupuncture for migraine prevention.

1 Da Silva AN.
Headache. 2015 Mar;55(3):470-3. doi: 10.1111/head.12525. Epub 2015 Feb 16.
PMID: 25683754 Review.
RESULTS: This manuscript reviews large and well-designed trials of **acupuncture** for **migraine** prevention and also the effectiveness of **acupuncture** when tried against proven **migraine** p medications. CONCLUSION: **Acupuncture** seems to be at least as effective as conventional d

Step 1:

Perform a PubMed search and select the reference(s) that you want to import into EndNote.

Choose [Save].

Select **PubMed** from the Format menu.

Click [Create File] and save the file.

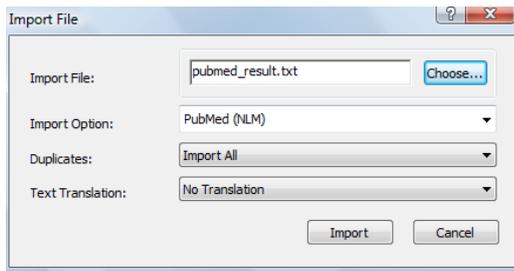
Step 2:

Go to EndNote and make sure that your library is open.

Windows: From the **File** menu, choose **Import > File** or click on the  button. Click [Choose] to locate and open the file you want to import.

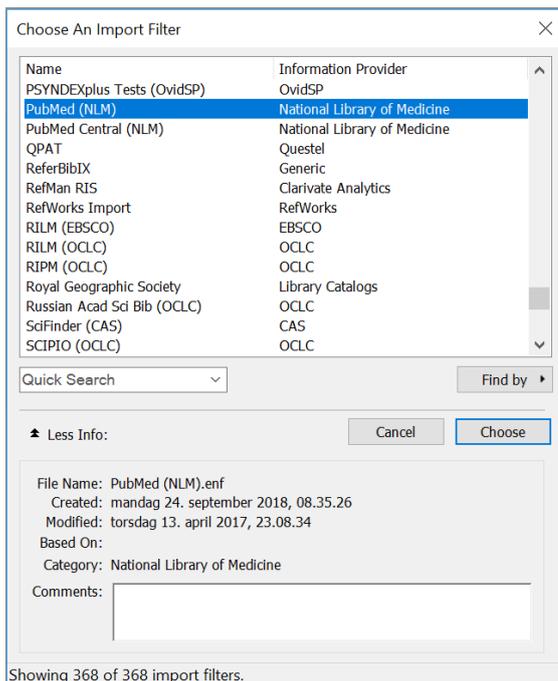
Mac: From the **File** menu, choose **Import**.

Locate the file you want to import.



Select the **PubMed (NLM)** filter from the Import Option list.

If you do not find the PubMed (NLM) filter in the Import Option list, choose **Other Filters** to see a list of available import filters.



Highlight the **PubMed (NLM)** filter and click [Choose].

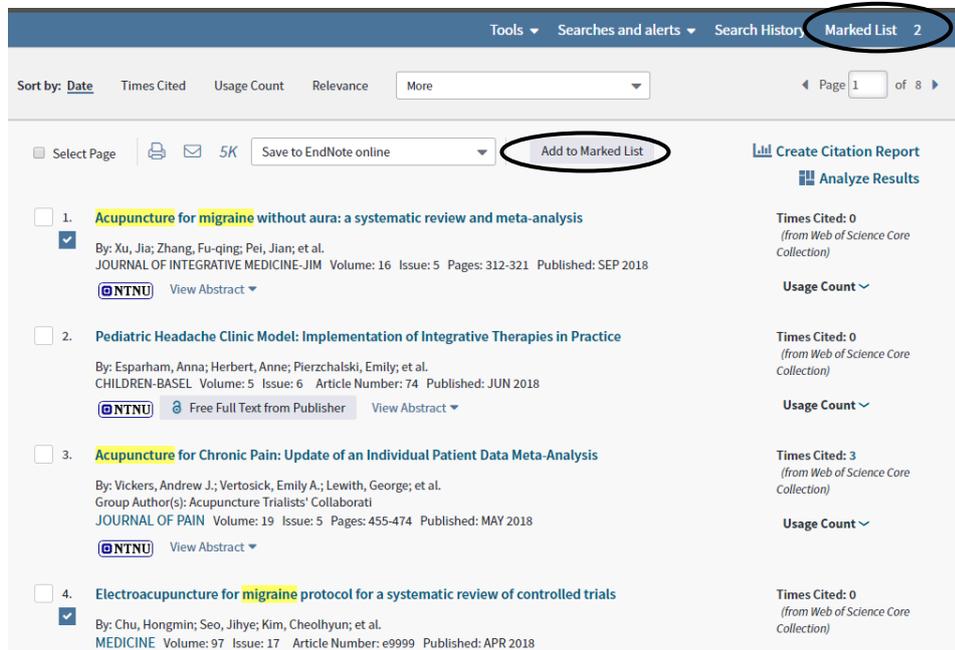
Select what EndNote will do with duplicates (import all references, discard duplicates or put duplicates in a separate duplicate library).

Click [Import].

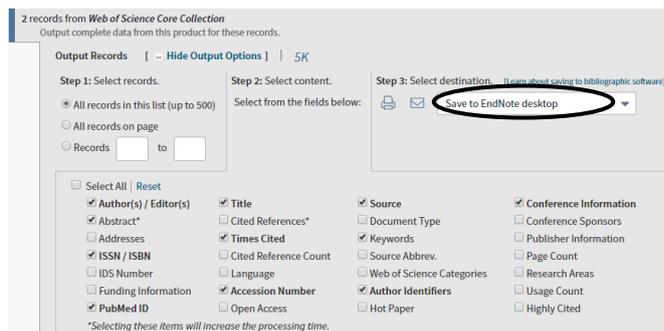
Peruse the imported data to make sure it imported as expected.

EXPORTING REFERENCES FROM WEB OF SCIENCE TO ENDNOTE

Make sure that your EndNote library is open.



Perform a Web of Science search. Select the reference(s) that you want to export to EndNote. Click [Add to Marked List] to add the selected reference(s) to the Marked List. Then click [Marked List].



Select the data to include.

From the Send to menu, choose **Export to EndNote desktop**.

Select the option [Open], if possible. If the reference(s) automatically are saved to a file on the desktop open the saved file.

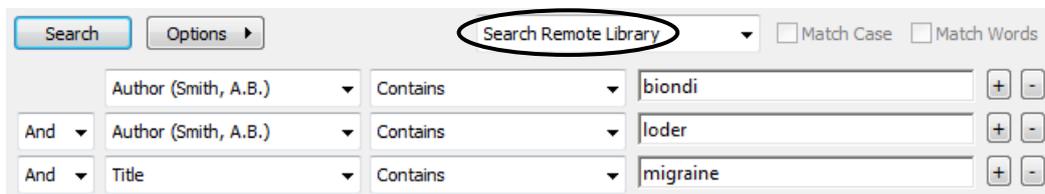
Peruse the imported data to make sure it imported as expected, and run duplicate detection.

SEARCHING PUBMED FROM WITHIN ENDNOTE

This search interface is intended for basic searches, not advanced searches.

Make sure that  Integrated Library & Online Search Mode is selected on the toolbar.

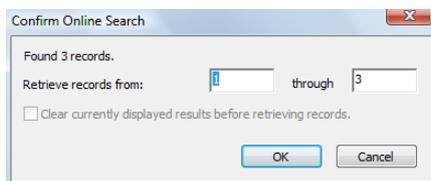
In the Groups panel under Online Search, select **PubMed (NLM)** to establish a connection with the PubMed database. (If PubMed (NLM) does not appear under Online Search in the Groups panel, follow the instructions on page 17).



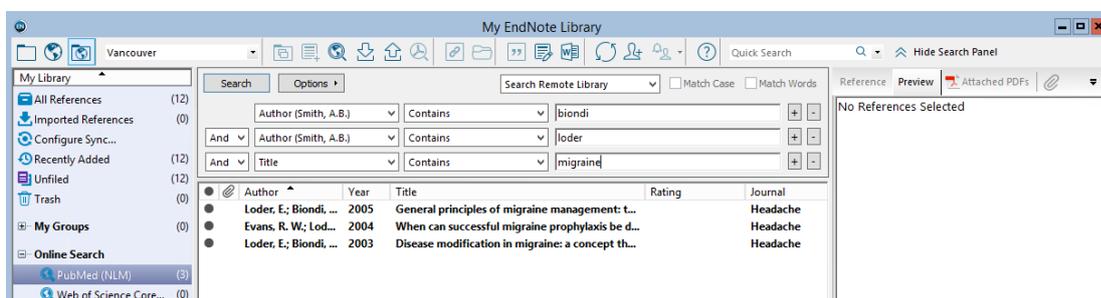
Choose a field to search and enter a search term.

You can combine search lines with the Boolean operators And, Or, and Not.

Click [Search] to begin the search.



Click [OK] to import the found references into your library.



Note that the downloaded references are saved directly into the library.

Select the Preview panel to peruse the references. If you do not wish to keep all the references, you must delete the ones you do not want. Highlight the unwanted references and choose **Move References to Trash** from the **References** menu.

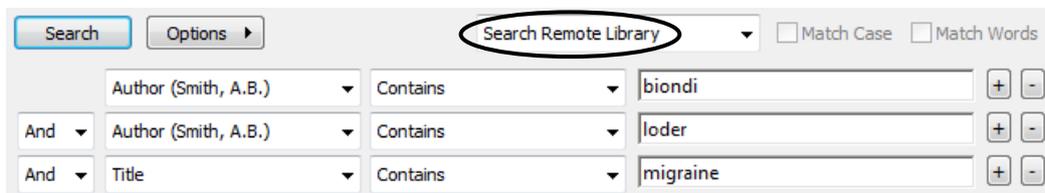
SEARCHING OTHER ONLINE DATABASES FROM WITHIN ENDNOTE

Make sure that  Integrated Library & Online Search Mode is selected on the toolbar.

Windows: From the **Tools** menu, choose **Online Search** or click on the  button to see a list of online databases that can be searched from within EndNote.

Mac: From the **Tools** menu, choose **Online Search** to see a list of online databases that can be searched from within EndNote.

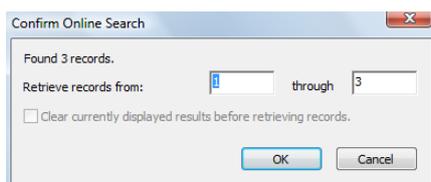
Select a database from the list to establish a connection with the database. Click [Choose].



Choose a field to search and enter a search term.

You can combine search lines with the Boolean operators And, Or, and Not.

Click [Search] to begin the search.



Click [OK] to import the found references into your library.

Note that the downloaded references are saved directly into the library.

Select the Preview panel to peruse the references. If you do not wish to keep all the references, you must delete the ones you do not want. Highlight the unwanted references and choose **Move References to Trash** from the **References** menu.

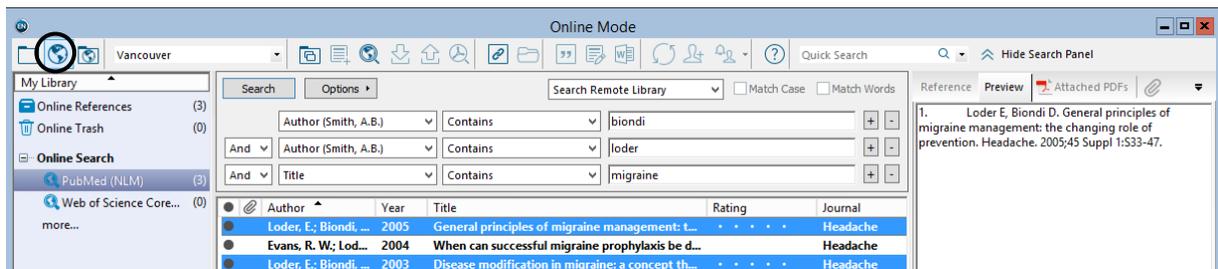
Once you have searched an online database, it appears under **Online Search** in the Groups panel. Click on the database you wish to search under Online Search, and EndNote connects to the online database.

ONLINE SEARCH MODE

This search method is most useful if your search finds a lot of references.

Select  Online Search Mode (Temporary library) on the toolbar.

See pages 16-17 for instructions on how to connect to and search an online database from within EndNote.



Note that when you download the references, the references are stored in a temporary library if you are working in Online Search Mode.

Choose the references you wish to keep.

Click on the  button to add the selected references to the permanent library.

When you have finished searching, select  Local Library Mode on the toolbar to return to your permanent library.

IMPORTING PDF FILES TO CREATE NEW REFERENCES

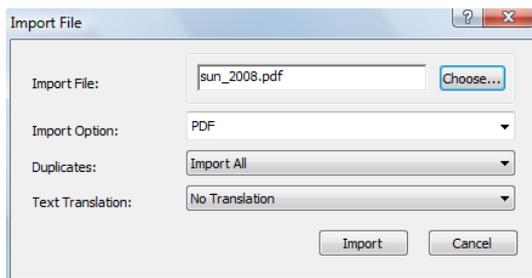
EndNote is able to import a PDF file and automatically create a new reference for it in your library. The PDF file will be attached to the reference.

Note that the PDF file must be publisher-created and contain a DOI (Digital Object Identifier) to import.

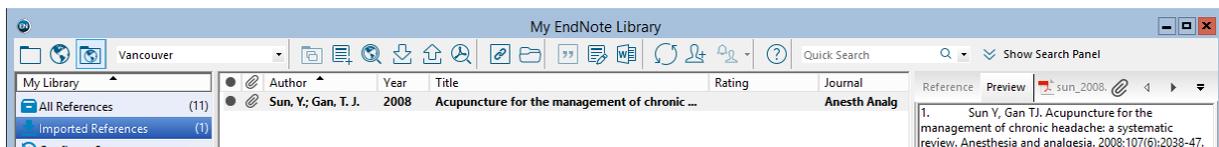
Make sure that your library is open.

Windows: From the **File** menu, choose **Import > File** or click on the  button. Click [Choose] to locate and open the PDF file you want to import. Set the Import Option to **PDF**.

Mac: From the **File** menu, choose **Import**. Locate the PDF file you want to import. Set the Import Option to **PDF File or Folder**.



Select what EndNote will do with duplicates (import all references, discard duplicates or put duplicates in a separate duplicate library). Click [Import].



Peruse the imported data to make sure it imported as expected.

You can also import an entire folder of PDF files at once.

Windows: Select **File > Import > Folder** during the import.

Mac: Select **File > Import** during the import.

SEARCHING AN ENDNOTE LIBRARY

Click on the **All References** group or choose **Show All References** from the **References** menu to search the entire library.

QUICK SEARCH

A screenshot of the Quick Search interface. It features a text input field containing the word "migraine". To the right of the text is a magnifying glass icon and a small downward-pointing arrow.

Type a search term into the Quick Search text box and press the ENTER key to search your library and attached PDF files.

THE SEARCH PANEL

Windows: From the **Tools** menu, choose **Search Library** or click the **Show Search Panel** button if the Search panel is not already showing.

Mac: From the **Tools** menu, choose **Search Library** or select **Show Search** from the layout menu if the Search panel is not already showing.

A screenshot of the Search Panel interface. At the top left is a "Search" button. Next to it is an "Options" button with a right-pointing arrow. To the right is a dropdown menu set to "Search Whole Library". Further right are two checkboxes: "Match Case" and "Match Words", both of which are unchecked. Below these elements is a search criteria table with three rows. The first row has "Author" in a dropdown, "Contains" in a dropdown, and a text box containing "endres". The second row has "And" in a dropdown, "Title" in a dropdown, "Contains" in a dropdown, and a text box containing "migraine". The third row has "And" in a dropdown, "Title" in a dropdown, "Contains" in a dropdown, and an empty text box. Each text box has a "+" button to its left and a "-" button to its right.

Choose a field to search and enter a search term.

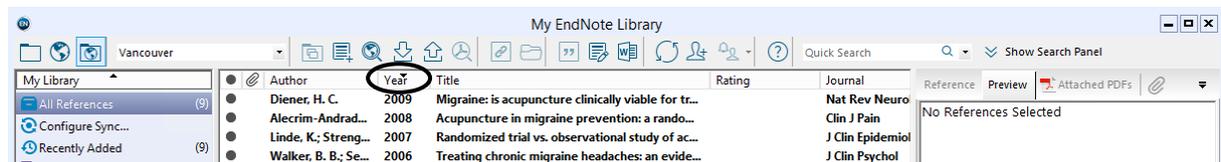
You can combine search lines with the Boolean operators And, Or, and Not.

EndNote matches partial words when searching for text. Select Match Words to find only exact matches to the search term.

Click [Search] to begin the search.

MANAGING AND ORGANIZING REFERENCES

SORTING REFERENCES

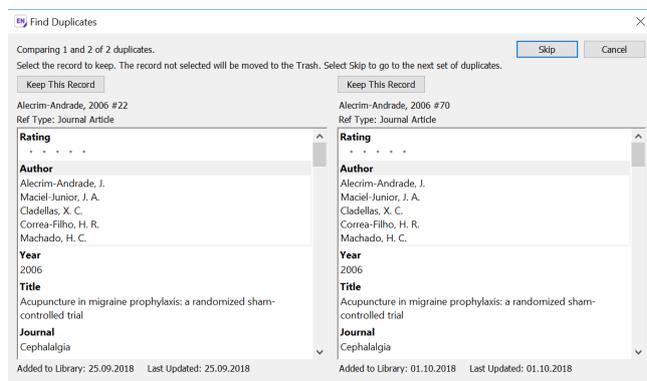


References can be sorted by clicking on a column heading.

FINDING DUPLICATE REFERENCES

Click on the **All References** group or choose **Show All References** from the **References** menu.

From the **References** menu, choose **Find Duplicates**.



Click [Keep This Record] to save that particular reference.

EDITING REFERENCES

Highlight the reference. Choose **Edit References** from the **References** menu or double-click the reference.

Edit the reference data. Close the reference to save the changes.

UPDATING REFERENCES

EndNote can update references by retrieving information from databases such as PubMed and Web of Science.

Highlight the reference(s). From the **References** menu, select **Find Reference Updates**.

Click [Update All Fields] or [Update Empty Fields], or click [Edit Reference] to manually update the reference. Click [Save and Continue] to save the changes.

DELETING REFERENCES

Highlight the reference(s) you want to delete.

From the **References** menu, choose **Move References to Trash**.

The references are not completely deleted until you choose Empty Trash.

Note: Do not delete references that have been used in a paper that you might want to reformat later.

CUSTOM GROUPS

Custom Groups are manually created by the user to help organize the library.

From the **Groups** menu, choose **Create Group** to create a custom group. Give the group a name.

Select the references you want to add to the group. From the **Groups** menu, choose **Add References To** and then select a group, or drag and drop the selected references onto the group in the Groups panel.

To delete a group, highlight the group. From the **Groups** menu, select **Delete Group**.

The references that were in the group are still part of the library.

To remove references from a group, highlight the references. From the **Groups** menu, select **Remove References from Group**. The references will still be in your library.

SMART GROUPS

Smart groups are built with search strategies, and are dynamically updated as you add references to and edit references in the library.

From the **Groups** menu, select **Create Smart Group**. Enter a name for the group.

Choose a field to search and enter a search term.

You can combine search lines with the Boolean operators And, Or, and Not.

Click [Create] to create the smart group.

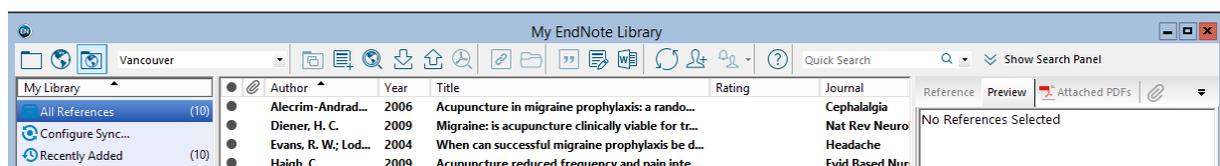
GROUP SETS

You can create group sets to organize custom and smart groups.

From the **Groups** menu, choose **Create Group Set**. Enter a name for the group set. You can drag groups to the group set, or you can create new groups under the group set heading.

PRINTING REFERENCES

If you do not want to print all showing references, highlight the desired references.



Choose a style from the drop-down list of output styles.

From the **File** menu, select **Print** to print a list of references.

CREATING AN INDEPENDENT BIBLIOGRAPHY

An independent bibliography is generated independently of a paper. (See pages 26-32 for instructions on how to generate a bibliography based on citations found in a paper).

EXPORTING REFERENCES

Open the library in EndNote.

If you do not want to export all showing references, highlight the desired references.

Windows: From the **File** menu, choose **Export** or click on the  button.

Mac: From the **File** menu, choose **Export**.

Select the type of file to be exported (Text File, Rich Text Format or HTML).

From the Output style list at the bottom of the dialogue, choose a style.

If you do not find an appropriate style, choose **Select Another Style** to see a list of available output styles. Highlight a style and click [Choose].

To export all of the references in the library, click on the **All References** group or choose **Show All References** from the **References** menu.

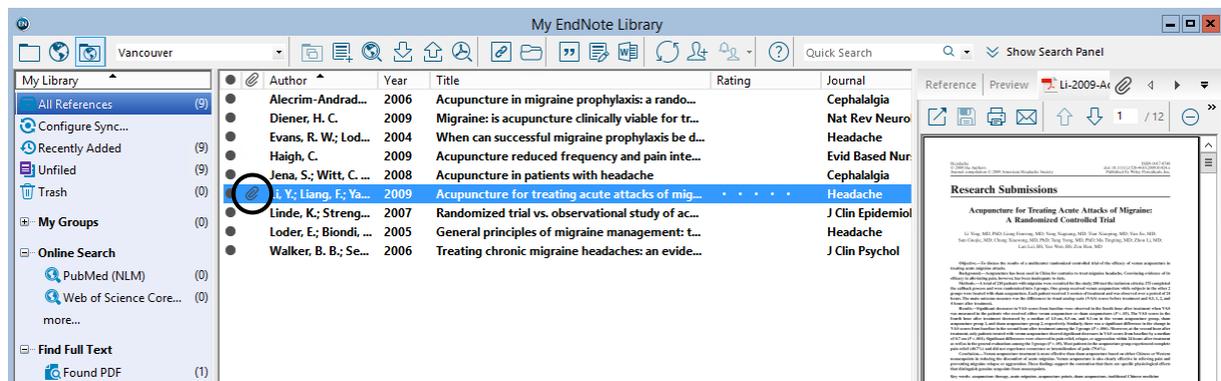
FINDING FULL TEXT FOR A REFERENCE

EndNote can attempt to locate full text files for the references. Once found, EndNote downloads and attaches the files to the references.

Make sure that your computer is connected to the network at NTNU.

Highlight the reference(s) to which you want to add full text.

From the **References** menu, select **Find Full Text > Find Full Text** or click on the  button.



When a full text file is downloaded and attached to a reference, a paper clip icon appears.

OPENURL LINK

The OpenURL Link command displays the full text if available. Note that EndNote only locates the full text. The full text file is not downloaded.

Make sure that OpenURL is enabled (see page 7), and that your computer is connected to the network at NTNU.

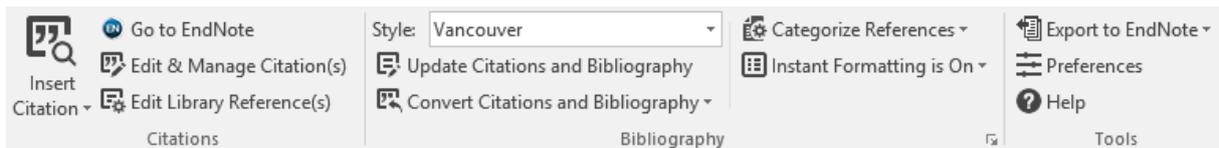
Highlight the reference.

From the **References** menu, choose **URL > OpenURL Link**.

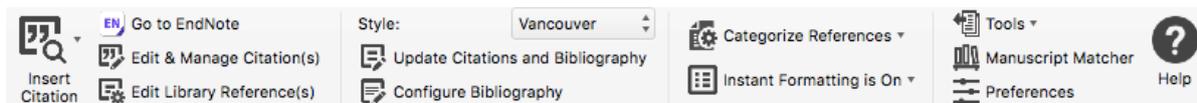
USING ENDNOTE WHILE WRITING IN WORD

EndNote's Cite While You Write feature inserts EndNote commands into Word to give you direct access to your references while writing a paper with Word.

Windows (Word 2007, 2010, 2013 and 2016): Cite While You Write commands are displayed on an EndNote tab on the ribbon.



Mac (Word 2016): Cite While You Write commands are displayed on an EndNote tab on the ribbon.

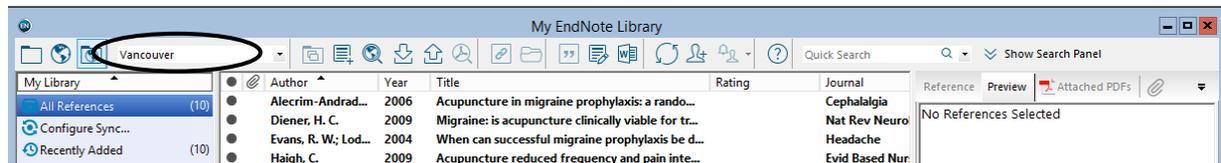


Mac (Word 2011): Cite While You Write commands are displayed on the Tools menu and on a corresponding EndNote X9 toolbar.



Open the EndNote library and open the Word document.

INSERTING CITATIONS



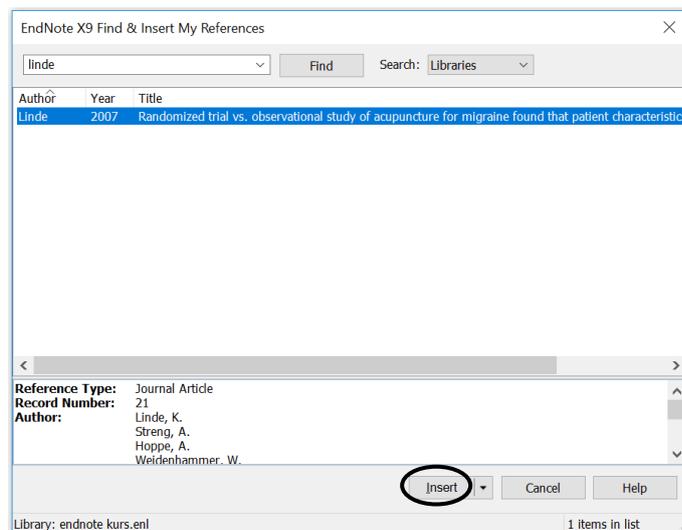
Select a style from the drop-down list of output styles.

If you do not find an appropriate style, choose **Select Another Style** to see a list of available output styles. Highlight a style and click [Choose].

Method 1:

Position the cursor in the text where you would like to put the citation.

Select the  button on the EndNote tab in Word.



Windows: Enter a search term and click [Find].

Mac: Enter a search term and press the ENTER key.

Highlight the appropriate reference.

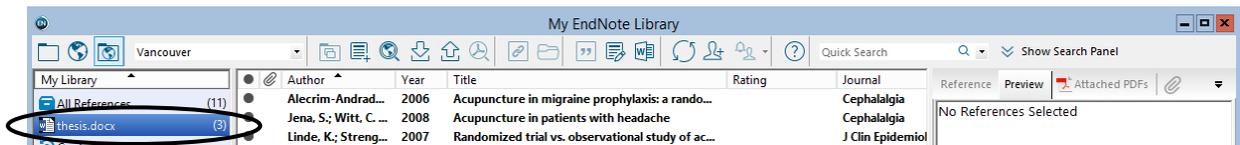
Click [Insert] or select an option from the drop-down list.

Method 2:

Position the cursor at the location where you would like the citation.
Highlight the desired reference(s) in your EndNote library.

Windows: Select the  button and then click **Insert Selected Citation(s)** on the EndNote tab in Word.

Mac: Select the  button and then click **Insert Selected Citation(s)** on the EndNote tab in Word.



Note that EndNote creates an auto-group for the Word document currently open. The auto-group contains all of the references cited in the document.

GENERATING A BIBLIOGRAPHY

By default, your citations and bibliography are automatically formatted as you work.

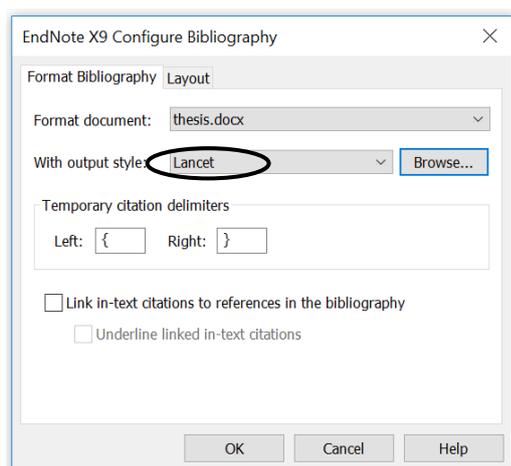
If your citations are not automatically formatted, and a bibliography is not updated each time you insert a citation, do the following:

Select the  **Update Citations and Bibliography** button on the EndNote tab in Word.

SELECTING A DIFFERENT OUTPUT STYLE

Windows: Choose the  button (corner arrow) on the EndNote tab in Word.

Mac: Choose the  **Configure Bibliography** button on the EndNote tab in Word.



Select the **Format Bibliography** tab.

Use the With output style option to choose a different style. Click [OK].

If you do not find an appropriate style, click [Browse] to display a list of available output styles. Highlight a style and click [OK].

ADDING STYLES TO THE OUTPUT STYLES LIST

More than 6000 styles are available, although a typical EndNote installation includes only the most popular styles. You can select additional styles as needed from the EndNote Website.

From EndNote's **Help** menu, choose **EndNote Output Styles**.

Perform a search to locate the desired style.

Style or Journal Name	Citation Style	Discipline	Date	
Lupus	Superscripted Number	Medicine	2012-04-11	Download

Windows: Click [Download] and then click [Open].

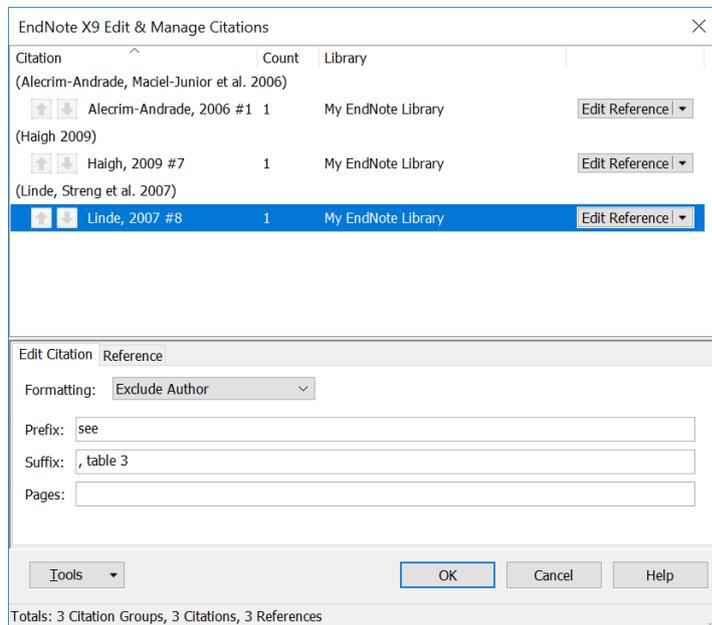
Mac: Click [Download] and then click [Save] to save the style file. Locate and open the style file.

From EndNote's **File** menu, choose **Save As**. Enter a file name and click [Save].

EDITING CITATIONS

Click on the citation you wish to change.

Select the  **Edit & Manage Citation(s)** button on the EndNote tab in Word.



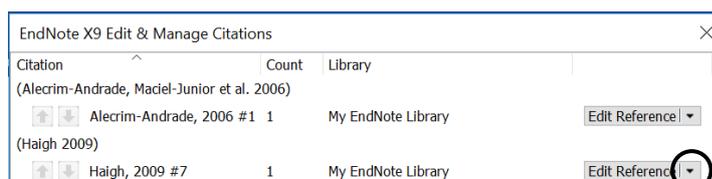
Make sure the appropriate citation from the list is highlighted and make the change(s), for example, omit the author name from the citation (formatting drop-down list) or add text before/after the citation.

Click [OK].

DELETING CITATIONS

Click on the citation you wish to delete.

Select the  **Edit & Manage Citation(s)** button on the EndNote tab in Word.



Make sure the citation you want to delete is highlighted. Choose the **Remove Citation** option from the drop-down list at the right.

Click [OK].

EDITING A REFERENCE

If you want to edit a reference (for example, need to correct the title), edit the reference in the EndNote library.

Highlight the citation in Word.

Select the  **Edit Library Reference(s)** button on the EndNote tab in Word.

Make the changes and close the reference in EndNote.

Return to Word.

Choose the  **Update Citations and Bibliography** button on the EndNote tab in Word.

UNFORMATTING CITATIONS

Windows: Choose the  **Convert Citations and Bibliography** button and then click **Convert to Unformatted Citations** on the EndNote tab in Word.

Mac: Choose the  **Tools** button and then click **Convert to Unformatted Citations** on the EndNote tab in Word.

To format the citations and generate a bibliography:

Select the  **Update Citations and Bibliography** button on the EndNote tab in Word.

Note that in order to format the paper again the corresponding EndNote library must be open.

REMOVING FIELD CODES

EndNote places Cite While You Write field codes in the Word document. You may need to remove the field codes in order to share your document with a publisher.

Windows: Choose the  **Convert Citations and Bibliography** button and then click **Convert to Plain Text** on the EndNote tab in Word.

Mac: Choose the  **Tools** button and then click **Convert to Plain Text** on the EndNote tab in Word.

Save a copy of the document without field codes.

Make sure that you keep the original document, which retains field codes, as you can not reformat a document without field codes.