Using

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Contents

Managing Bibliographic References using EndNote

EndNote is a software tool for creating a personal database of references which can be integrated with Word to insert citations into a document and create reference lists. EndNote calls these databases Libraries. The software is available for PCs and Macs. These notes were produced using the PC version.

Note   There is also a web version of the software called EndNote Web, the two packages are can interact with each other.

Starting EndNote the first time

When you start EndNote it may offer to create an EndNote Web account or integrate with your existing account. You can ignore this and set this up later.
You will then be presented with a **Getting started** screen.
The *Learn about EndNote* option uses the Help file to introduce EndNote.
If you close this window you will be invited to create a new default EndNote Library where your references will be stored; the default name is *My EndNote Library*. When you have done this, EndNote displays the screen below.
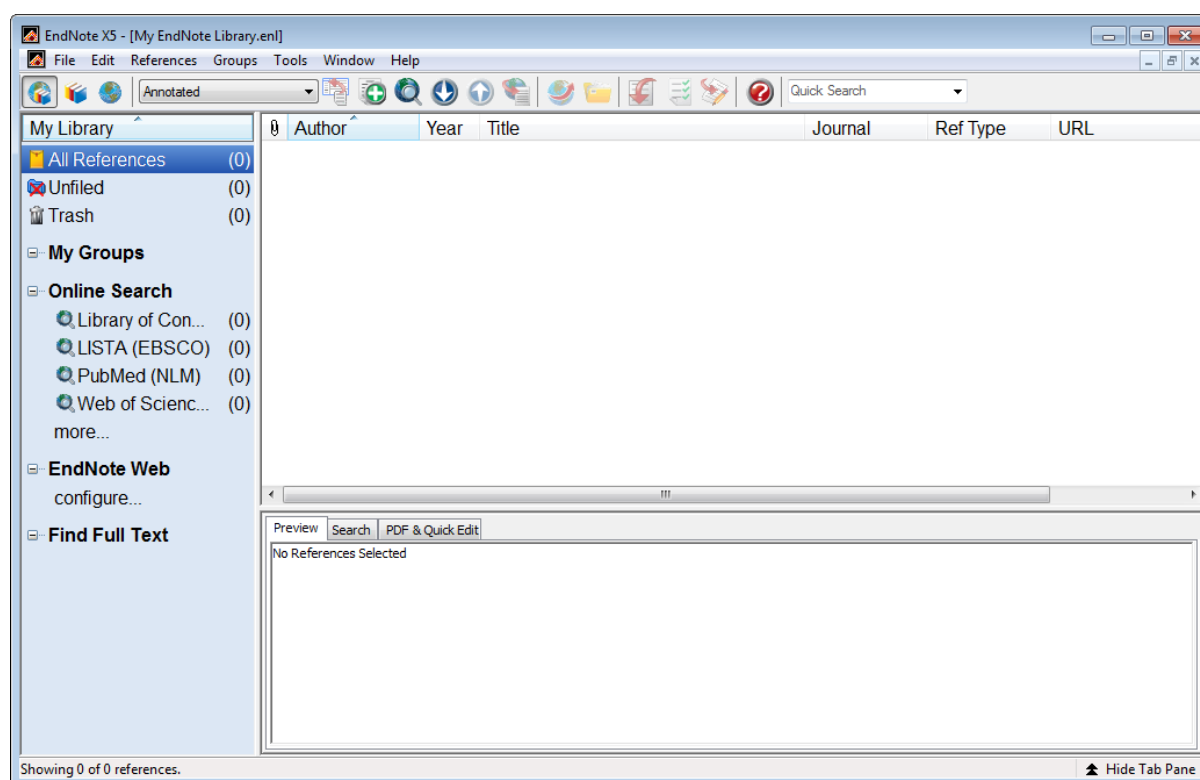
Groups

EndNote uses groups (similar to folders) to manage sets of references. Although you can leave your references in an 'All References' group, it is recommended that you create groups to store and view subsets of references. A Group points to a subset of references that already exist in the EndNote library.

Types of Groups in EndNote

There are several types of groups that allow you to organize your references in EndNote. The first sections of groups are automatically generated, and include both permanent groups and temporary groups.

- **Permanent Groups** include *All References, Unfiled* and *Trash*. These are groups that you cannot remove or rename. *All References* displays every reference in the library. *Unfiled* are references that have not been placed in a custom group (*My Groups*) *Trash* is a holding place for references you have removed from the library but have not yet permanently discarded by emptying the *Trash*. It is like the Recycle Bin.
- **Temporary Groups** include *Copied References*, *Duplicate References*, *Full Text*, *Imported References*, and *Search Results*. These temporary groups may be replaced as you use commands in EndNote, and are always deleted when you close a library. (Only the groups are deleted; the references remain in the library.)
- **Custom Groups** in the *My Groups* section are manually created by the user to help organize the library; you can drag-and-drop to copy individual references into a custom group. Custom Groups are listed alphabetically (click the Groups header to toggle between ascending and descending order). These could be chapters for a thesis.
- **Smart Groups** (Not visible) use search criteria to dynamically update groups as existing references are edited or new references are added to the library.
- **Combination** (Not visible) are created by logical operations (AND, OR, NOT) on Custom and Smart Groups.
- **Online Search** groups allow you to easily initiate a search of a favourite online database and quickly view the latest download.
- **EndNote Web** groups allow you to easily initiate a transfer of references between an EndNote Web folder and your EndNote desktop library.

Collecting References

There are three approaches to collecting references.

1. Perform an *Online Search* within EndNote. This is the quickest way, but not always the best approach from a bibliographic searching perspective.
2. Enter a *New Reference* manually by typing the details in. This is a last resort and will not be described in these notes because you should rarely need to use it. It is much better to search for a reference online, even if you have the paper copy in front of you.
3. Perform a search using a bibliographic provider such as OVID or EBSCO to search databases and then *Import References* found. This is a better approach and is recommended by librarians; the reasons for this will be explained later.

Online Searching

EndNote initially offers four databases to search:

- Library of Congress
- LISTA(EBSCO)
- PubMed
- Web of Science

For Biomedical researches PubMed and Web of Science will be of interest. To remove databases you will not use regularly, right click on the database name and select *Delete Group*. If you click the *more…* item you will be offered a lot of other resources to search. This is discussed later (see page 8).

Searching PubMed

Suppose you are interested in whether there is any evidence that pet hamsters are associated with asthma. Select PubMed, a brief connecting to host message will be displayed.

Change the dropdown displaying *Author (Smith, A.B.)* to *Keywords(MeSH)* and enter the search criteria (**asthma** and **hamster**) into the text boxes as shown below.
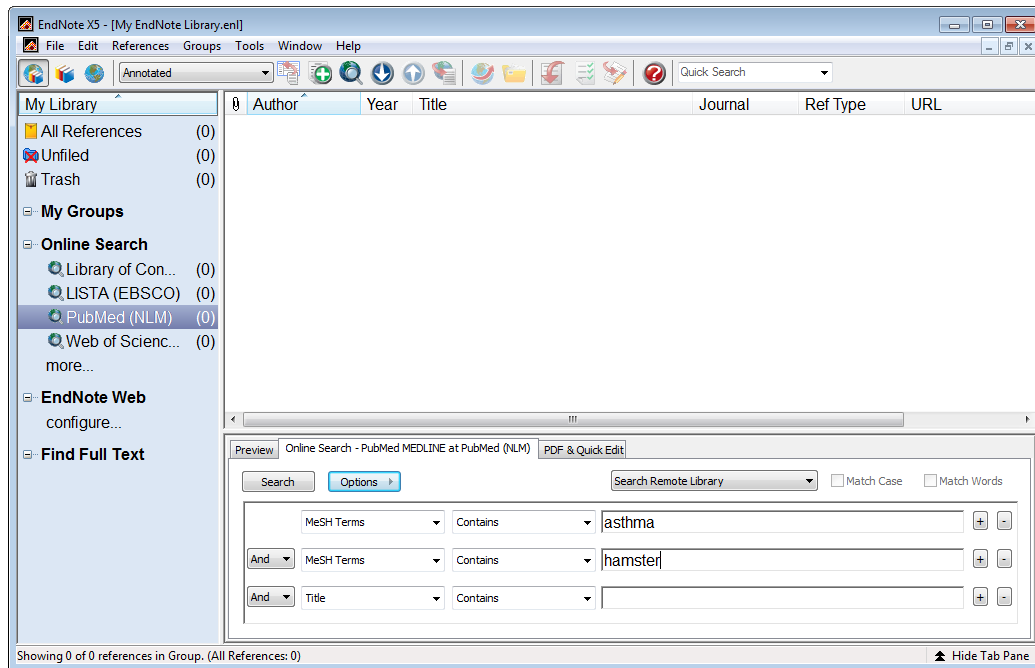
Click **Search**

A *Confirm Online Search* dialogue displays the number of records that will be retrieved for your search. You can cancel this and refine your search if you get too many hits. Click **OK** to retrieve the results.
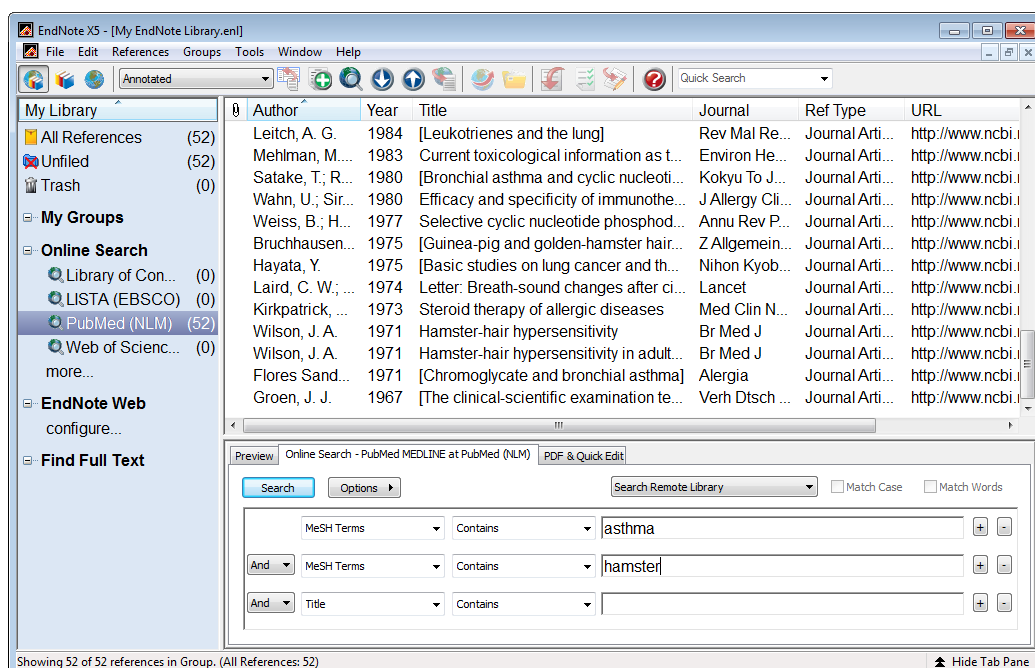
The title of each column above the retrieved references can be used to sort them by clicking on the column heading; a second click reverses the sort order.

Clicking on a reference selects it and a right mouse click displays a menu of options for that reference.

Double clicking on a reference displays an editing window with the full details of the reference and here you can make changes to the record. You can also use the *PDF & Quick Edit* tab to do the same.

The Open Link button 🌐 in this dialogue and on the main toolbar opens the PubMed entry for this journal article in your web browser.
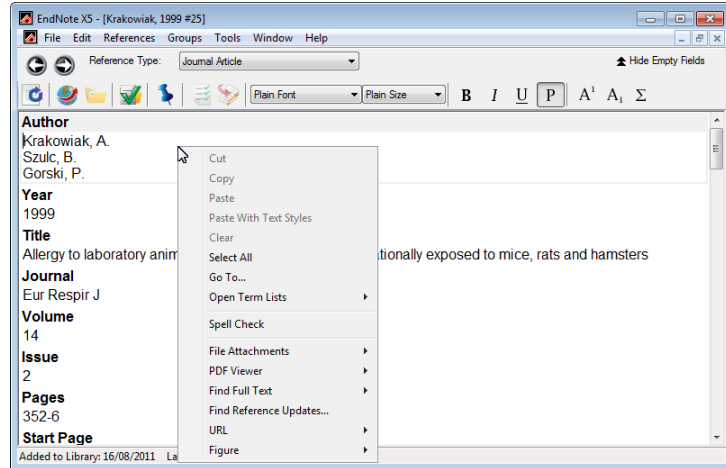
Searching Web of Science

Another useful bibliographic source is Web of Science (part of the Web of Knowledge). Web of Science covers Science Arts & Humanities and Social Science.

Suppose you wish to perform a similar search to the previous PubMed search (page 5) using *Web of Science…* with **asthma** and **hamster** as the search criteria. Change the drop down list from *Author (Smith, A.B.)* to *Title/Keyword/Abstract*. Click **Search**
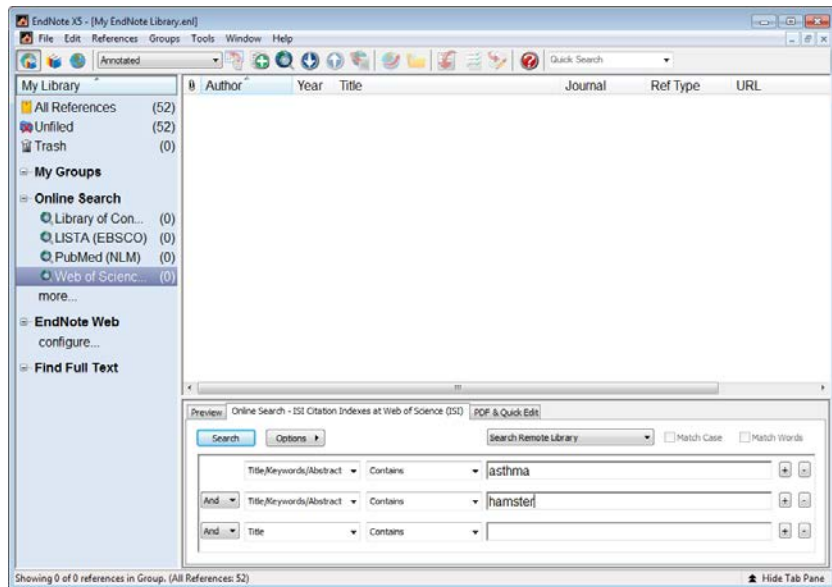
Note   A different number of references, greater in this case, will be returned compared the PubMed search carried out previously. Some references will be the identical to those from the PubMed search, others will be new. Web of Science catalogues different publications but covers the major biomedical journals and include conference proceedings.

One difference between reference information from the PubMed and Web of Science search is in the URL column.

The URL from a Web of Science search points to the ISI Web of Knowledge site.
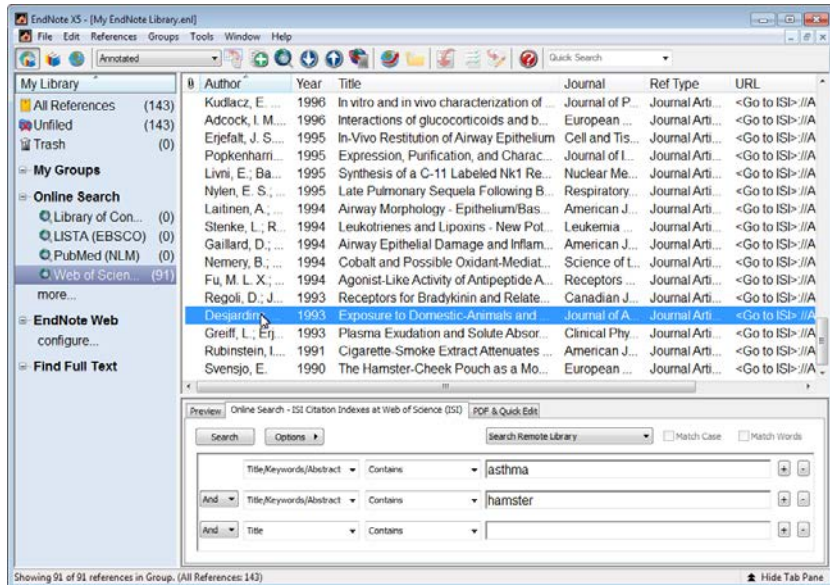
Clicking the Open Link button takes you to the Web of Knowledge entry.

If you click on:

35 **Times Cited**, WoK will display publications citing this paper. Similar information comes from **Times Cited** 34 (from Web of Science)

Cited References 35 displays the references cited by this publication.
view related records will search for and display publications similar to the one shown.
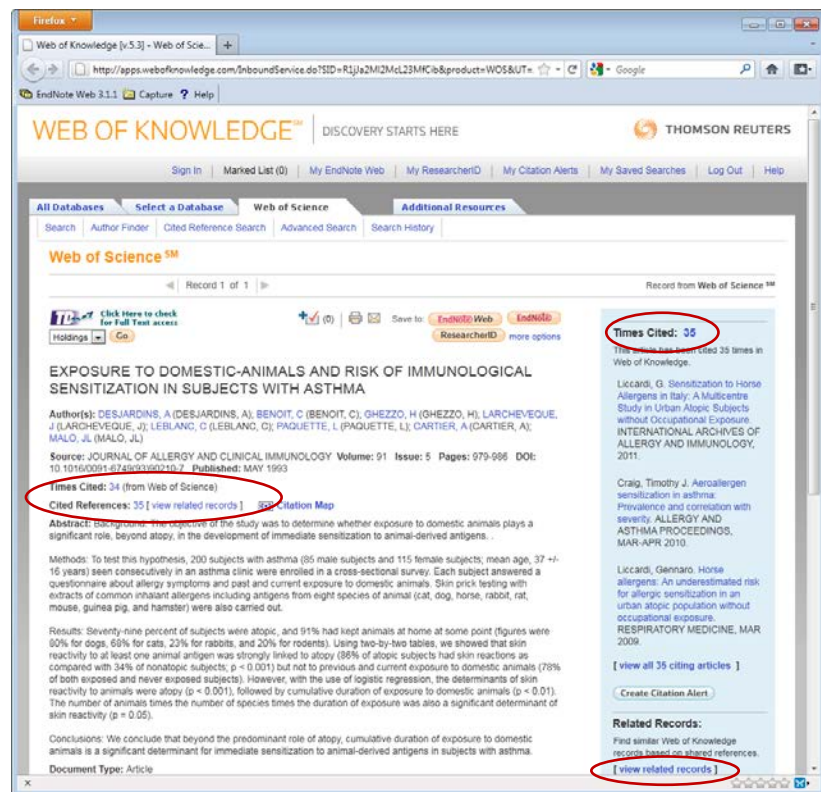
Note   The Web of Knowledge page displays a link *, this will link to the full text of the paper if the Library has a subscription for the journal.*
The ***Save to:*** *links can be used to save selected items to EndNote from within the Web of Knowledge.*

EndNote and ISI Web of Science/Knowledge are produced by the same organisation, Thompson Reuters, and are closely integrated, offering additional features that you do not get from PubMed searching.

Searching Other Resources

The *Online Search– more…* option links to more than 4300 other bibliographic systems primarily library catalogues. To add other resources to the Online Search list, select **more…**
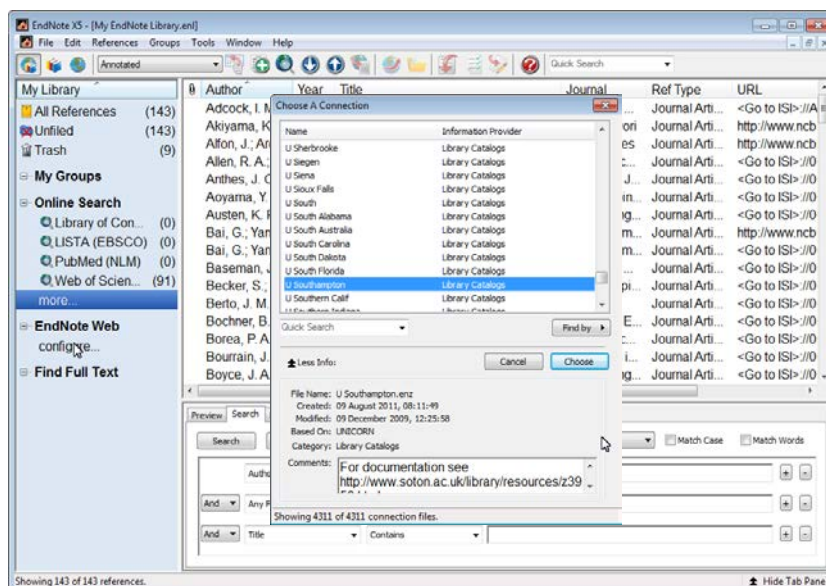
You could for example select U Southampton to enable you to search the Library catalogue (see below).

To remove or hide a connection from the Online Search list right clikc over the name and select Delete Group. It is unlikely that you will need LISTA(EBSCO) for example

Searching Library catalogues

EndNote can search University libraries for book details. However the search facilities for U Southampton are strict and do not offer fuzzy matching. For example searching for "Altman Douglas" finds 9 books, but a search for "Altman D" or "Altman D.G." fails to locate any books by this author. A better connection to use is "*U Manchester*". This is because this database includes the catalogues of many UK academic libraries, including Southampton, and the search facilities are less restrictive. Searches of "Altman Douglas", "Altman D", or "Altman D.G." all find the books by this author. Note variations such as "Altman DG" or "Altman D G" do not work!

Capturing References from OVID, EBSCO and Faculty of 1000

References can be 'pushed' to EndNote from bibliographic providers such as OVID, EBSCO and Faculty of 1000. This is useful if you need to search databases which cannot be searched directly using EndNote.

Note: The Library provides general guides and online information skills tutorials for these resources. Follow the Databases link. You may notice that there are connection filters in EndNote for Medline (OVID SP) and other databases that are available at Southampton. These do not work for UK sites, they login details for the USA.

OVID

OVID provides access to *AMED (Allied and Complementary Medicine), EMBASE, Medline, Health Management Information Consortium* and other databases.

The figure below shows the results of a search of the **EMBASE** database (European equivalent of MEDLINE/PubMed) for 'Asthma' and 'Hamster'.

Select the *Results* to be exported to EndNote from the *Results* list.
Individual references can be selected by clicking the check boxes ☑ (not shown). All references by checking ☐ **All** box.
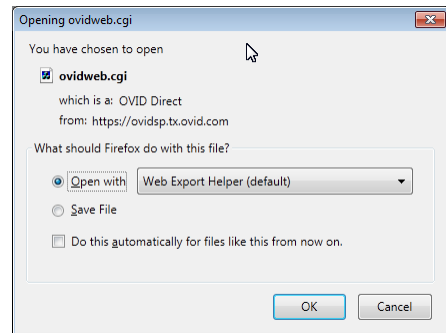
Select the 🅱 **Export** button.

The Export Citation List dialogue will be displayed
Use the *Export To* drop down to select **EndNote**.

In *Select Fields to Display* select *Complete Reference*.

Click **Export Citation(s).**

A dialogue, *Opening ovid.cgi*, will be displayed. Choose the *Open with Web Export Helper(default)*

A Choose Destination, offering EndNote, EndNote Web or Reference Manager may be displayed if these packages have been installed on your system. If so select EndNote.

EndNote will display a *Choose An Import Filter* dialog. Use this to select the database and provider that was used to provide the references.

You can either scroll down the list of over 600 filters, or click the **Filter by** button and use this list to select the information provider, in this case *OvidSP*, and then select the database, *EMBASE*. Click **Choose** to import the references. A temporary *Imported References* group is created which disappears when you close EndNote.
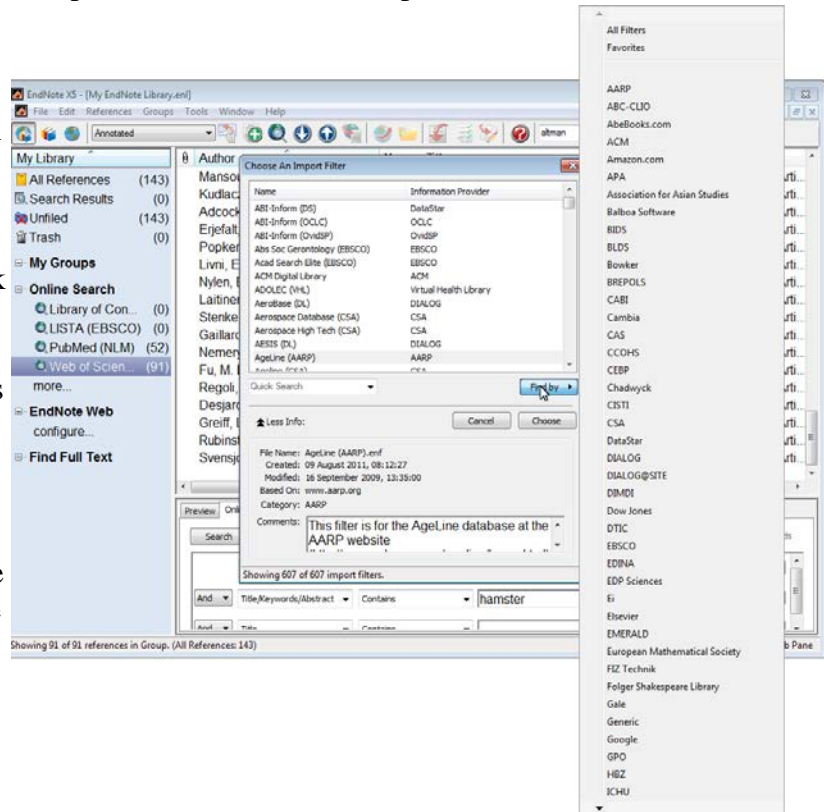
The filter EMBASE (OvidSP) is then added to the Favorites list at the top of the Find by list.

EBSCO

EBSCO enables searching of the *CINAHL, PsycINFO, PsycARTICLES* and *Medline* databases.

To save results from an EBSCO search view the folder containing the results.

Select the references you wish to save using **Alert / Save / Share ∨** .
Add the references to the generic Results folder or to a named folder.

Select the folder link (top right of screen) **Sign In | Folder | Preferences | New Features! | Help**
Select (All) the references to save.

Click the ***Export*** button
Select *Direct Export to EndNote, ProCite, CITAVI, or Reference Manager*.

An *Opening delivery* dialogue will appear similar to the *Opening ovid.cgi* at the top of this page. Use the *Open with Web Export Helper (default)* option and click **OK**. In this case the references are automatically imported into EndNote, you do not have to select an Import filter.

Faculty of 1000

Select the articles of interest and use the ⬆ Export button to select EndNote in the *to* dropdown list on the Export dialogue window, click **Send**.

In the *Opening endnote.enw* dialogue, select *Open with EndNote X5 (Bld xxxx) (default)*. Click **OK**. The articles will be imported into EndNote.
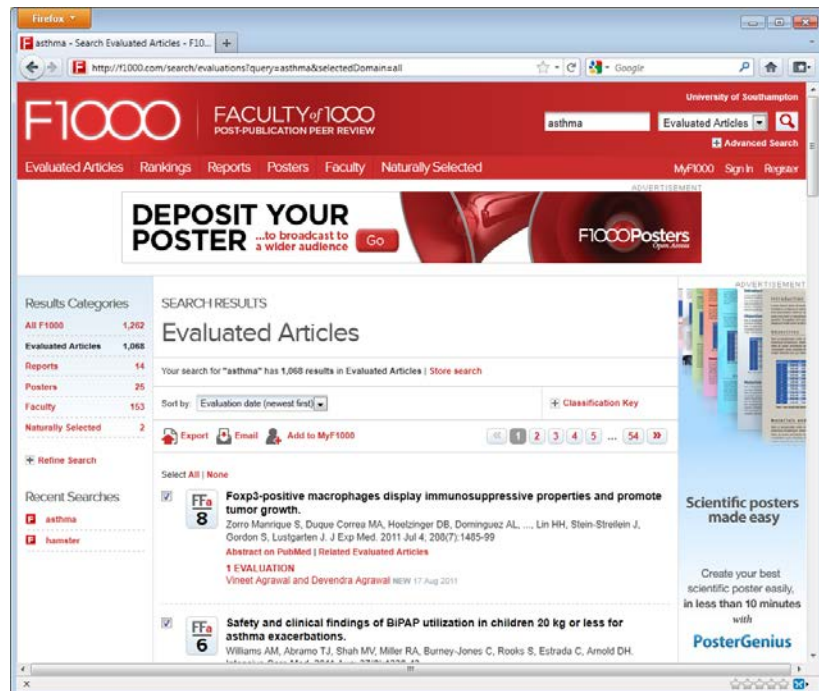
Unlike other information providers, the URL link provided by Faculty of 1000 takes you directly to the journal article, if you have institutional access or it is free to view. Other providers take you to their web site from where you can use a [image] link to access the full article.

Importing details from a PDF file

If you have a PDF documents of an article that is not in the EndNote library, EndNote can import the details of that article if it contains the appropriate metadata and DOI information. Select **File | Import | File** for a single document, or select **File | Import | Folder** if you have several PDFs. EndNote will scan the document(s) and extra details if possible.

Linking documents to a reference– File attachments

You can link a reference to a file, for example a PDF of the article if the copyright permits this.

Select the article in the list of references, right click and select *File Attachments* and then *Attach File*. This opens a *Select a file to link to the reference* dialogue. Navigate and select the file you want to link to.

You can also use the References menu to achieve the same thing.
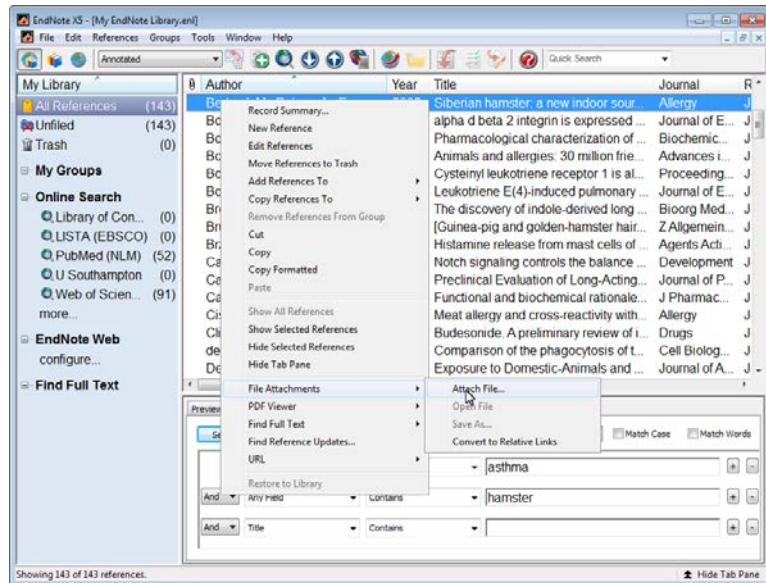
Finding Full Text for a Reference

EndNote can attempt to locate full text (PDF) files on the Web and link these to the references in your library. It uses various methods to optimise the likelihood of finding full text files associated with your bibliographic records.

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

- In the Library window, you can highlight up to 1000 references.

  You can select a single reference, use the *Ctrl- Click* technique to highlight individual references, or use **Edit | Select All** to select an entire Group of displayed references.

- Either *Right Click* the selected references, or from the menu, choose **Find Full Text > Find Full Text**.
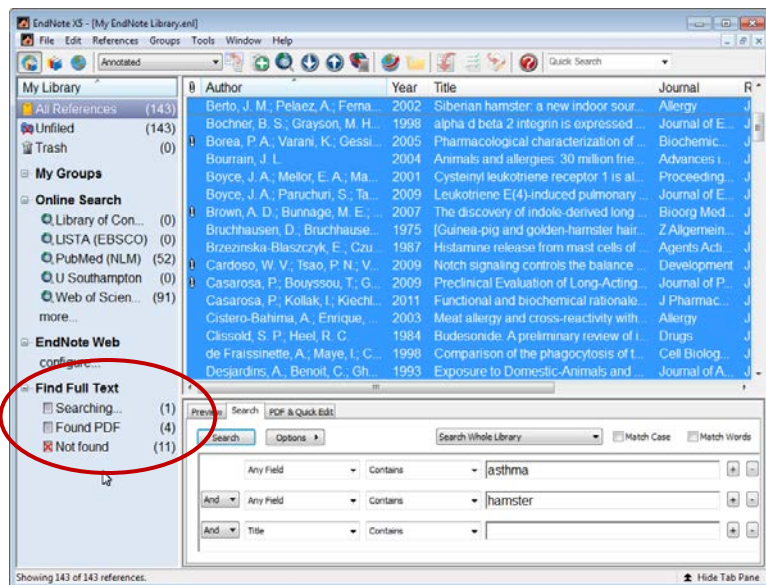
A pop will warn you about copyright and publisher rights. EndNote will search in the background and shows the progress of this feature with numbers for the Searching, Found PDF and Not Found items. The Ü symbol shows references with attached files. The *PDF & Quick Edit* tab will display PDFs attached to references.

You may be directed to an institutional login web page during this process . Follow the instructions to log in, such as entering the appropriate User ID and password. Once you are logged in, click *Continue*.

Duplicates

Duplicate detection is not guaranteed to detect all duplicate references in your library. On the menu select **References | Find** duplicates to search for duplicates.
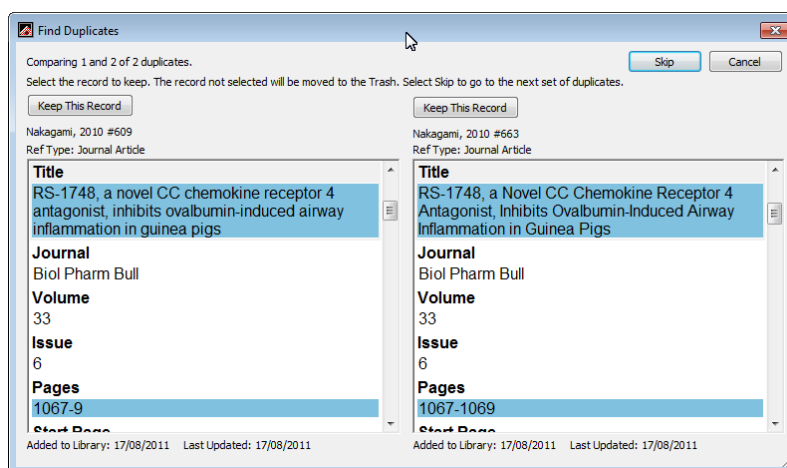
Use the **Keep this Record** button to select which version of a reference to keep.

Beware it is not perfect! The two references below illustrate this. A pairs of duplicate references by Gonzalez-Mendiola *et al* which were not identified as duplicates by EndNote. This is because they were obtained from different sources which entered author names differently as:

> González-Mendiola, R; Montano, PP; Macias, MH; Lombardero, M; Martin, TM
> González-Mendiola R, Prieto Montaño P, Hinojosa Macías M, Lombardero M, Muñoz Martin T.

One uses the full European alphabet, it also added a full stop at the end of the title field!

Note   You might want to experiment with the fields used by EndNote to detect duplicates; it uses Author, Title and Year. However using just Year and Volume may detect further duplicates but also suggest references that are not duplicates.

Linking with EndNote Web

EndNote Web is a web based version of EndNote with similar, but fewer features. However it can be used from any computer/smart device using a web browser You can create a personal EndNote Web account and transfer references between the two systems (EndNote Desktop and EndNote Web). See Before You Begin Transferring References in EndNote Help.

Using Cite While You Write

Cite While You Write enables you to place citations into your Word document as you create it. An EndNote toolbar is added to Word to facilitate the process.
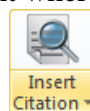
Word 2010 toolbar
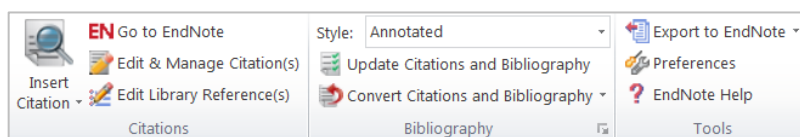
Word 2003 toolbar

The features of all these buttons are described in EndNote Help / . Some are described below.

Word 2010

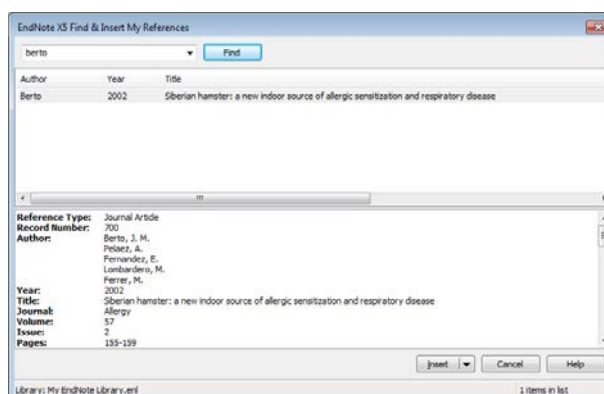*Note   These notes for Word 2010 also apply to Word 2007.*

Start writing your Word document, when you reach the point where you need to cite

previously published work, click the **Insert Citation** button ,if a drop down menu appears, select **Find Citation**.
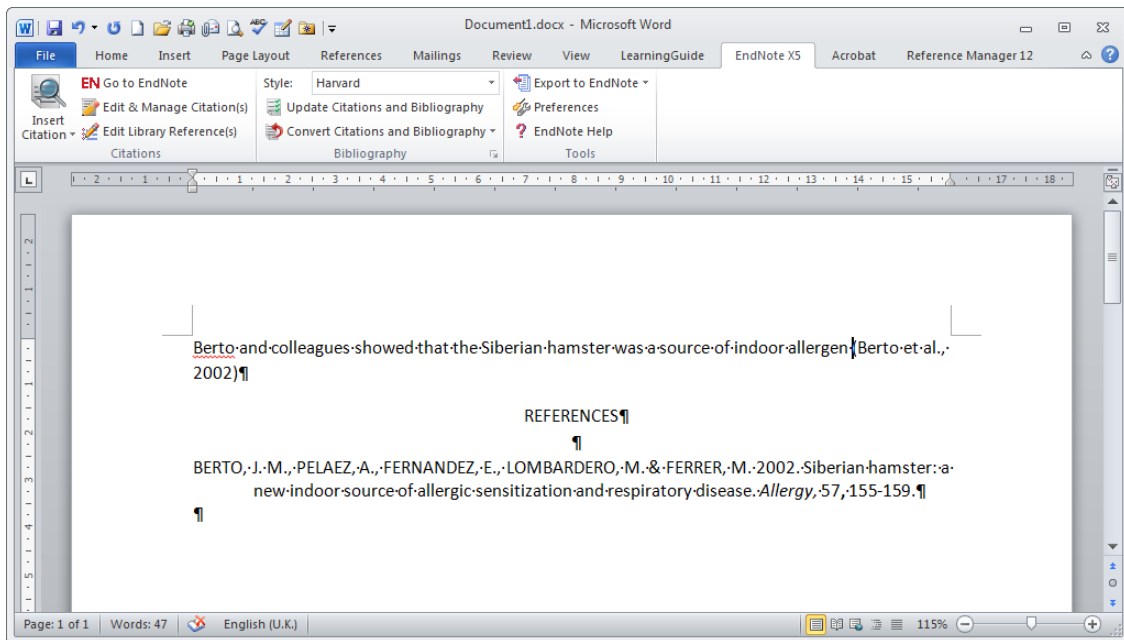
An *EndNote X5 Find & Insert My References* window is displayed. Enter a term in the *Find* text box. It could be an author, for example `Berto`.

Click the **Find** button.

All references matching the search term are displayed, a single reference in this example. Select the reference by clicking on it. If you find several references and want to insert more than one citation, use <Ctrl Click> to select multiple references.

Click the **Insert** button. The citation is inserted into your Word document and a reference list is created at the end of the document in the style of journal currently selected, *Harvard,* in this case. The correct output style may need to be selected but you can do this after citations have been added.

The citation and reference are inserted as Word fields. You can see this by clicking on them. They have a grey background.

To change the reference list details click the **Style:** drop down. If the required style is listed, the *Brit Medical J* (British Medical Journal) in this case, select it, otherwise choose the first item *Select Another Style*
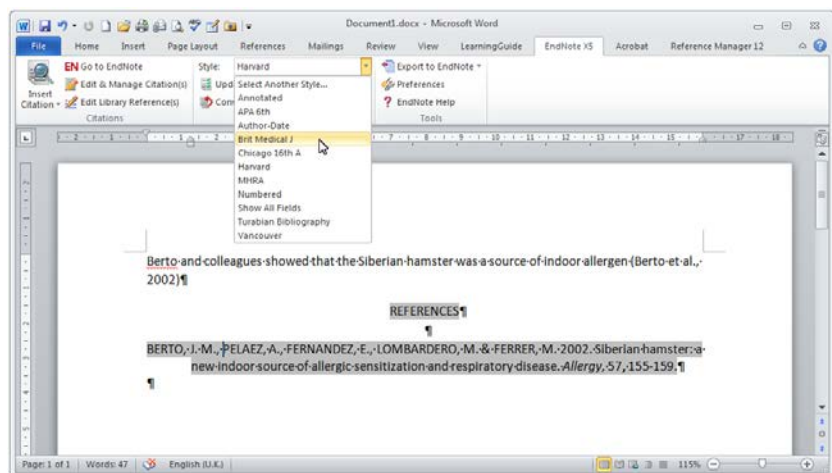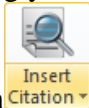

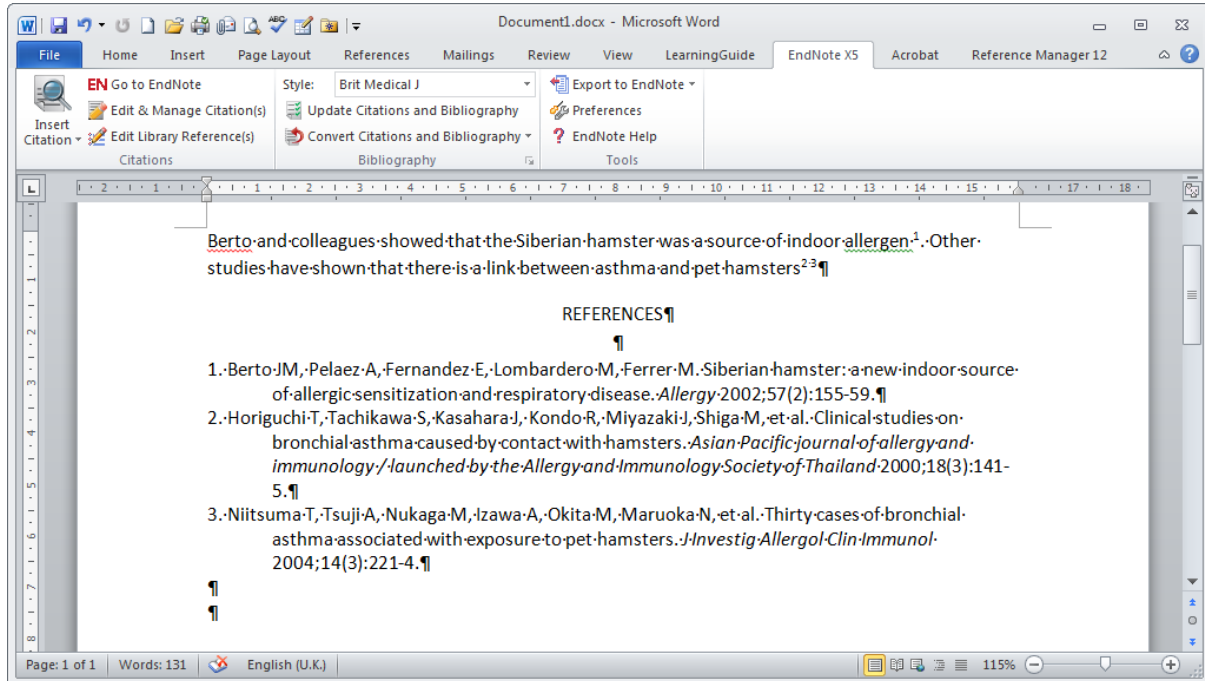Select the styles you want from the EndNote X5 styles window, click **OK**.
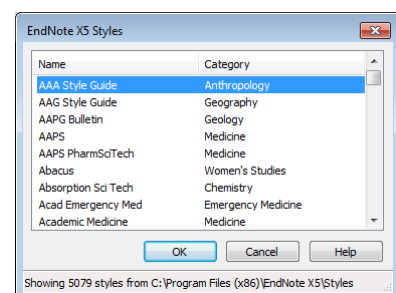
Note   Using the Harvard format above had author names capitalised in the Reference list whereas the BMJ format (next page) uses mixed case.

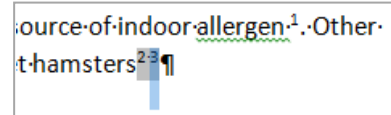Continue writing your document and when you need to cite additional papers use the **Insert**

Citation button to search your EndNote references for them. In the example below two papers were found by entering '`asthma hamster`' as the search term.


Tips on using CWYW

1. *Errors in Citations*. You may find errors in the reference list for the citations you have inserted. To correct this, select the citation in the text of your Word document. In the example reference 3 has been selected by dragging across it. Click the button. This will open up an EndNote Edit window for the reference as described on page 6. Correct the error and select **File | Close Reference**, you will be asked if you want to **Save** the changes. You can return to Word by clicking the **Return to Word Processor** button . Click on the button to rebuild the document with the reference corrected.

2. *Changing the order of, inserting or deleting citations*
   Click the button to display the EndNote X5 Edit & Manage Citations window opposite. Here you can move the order of citations in a list using the buttons. Use the button to Edit the current reference (as above), Remove the current citation or Insert another citation.
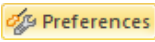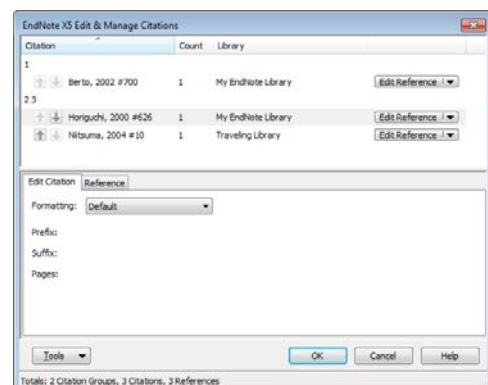
3. *Disabling the automatic generation of the reference list*

With large documents, containing many references you may find that the Instant Formatting feature of rebuilding the reference list each time you insert a new reference is tedious and Word is busy for too long.
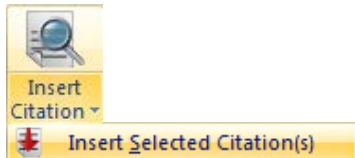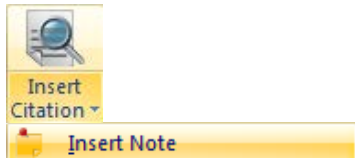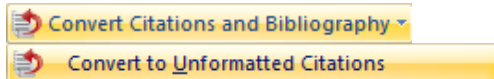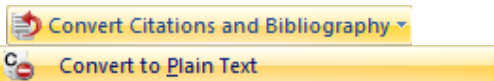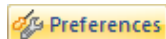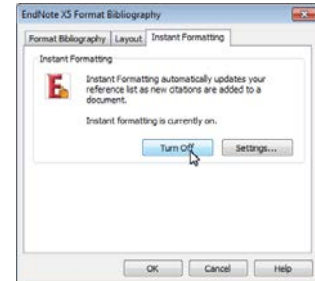Select the arrow at the bottom of the bibliography section.

A bibliography dialogue window is displayed. Select the *Instant Formatting* tab and click the **Turn Off** button.

Alternatively, select Preferences choose the *General* tab and untick the *Enable Instant Formatting on New Word documents* box. The automatic generation of the reference list is turned off, Use the Update Citations and Bibliography button to generate the full list of references when you are ready.

Other Word - EndNote buttons

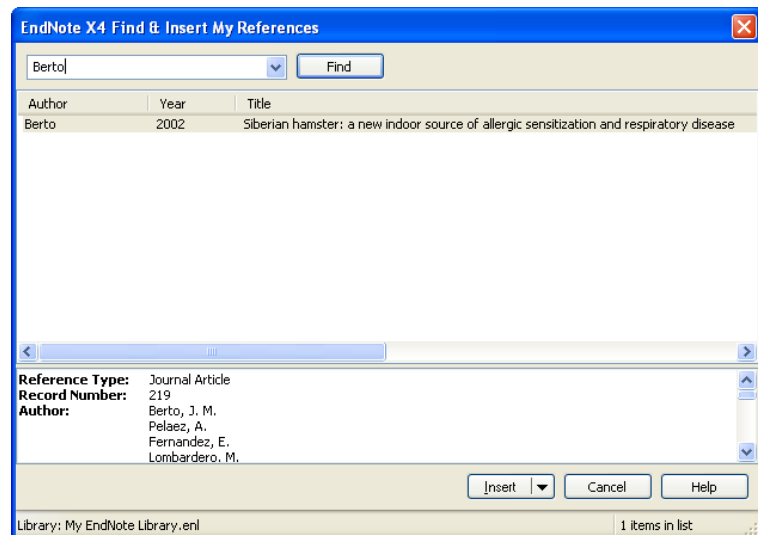| Button	Function
Insert Citation – Insert Selected Citation(s)	If you find and select references in EndNote, you can use Insert Selected Citations to insert these references into your Word document. This is an alternative to using Insert Citations from Word.
Insert Citation – Insert Note	Some journal styles require that you include notes along with the list of works cited at the end of the document. In such a system, notes are numbered just like citations, and are included in the reference list in order of appearance, along with bibliographic references. Including notes in this way makes sense only when you are formatting your paper with a numbered (Vancouver) style.
Convert Citations and Bibliography – Convert to Unformatted Citations	Converts formatted or unformatted citations back to the original identifying text you entered. The bibliography can be regenerated from this text. This feature may be useful for resolving problems with corrupted Word documents which cannot create the bibliography correctly.
Convert Citations and Bibliography – Convert to Plain Text	This feature removes all of the Cite While You Write field codes and converts formatted citations and the bibliography to plain text. It is used to create the final document you send it to a journal. However, before using this feature, make sure you have a copy of the original Word document containing the EndNote codes.
Export to EndNote – Export Traveling Library	There may be occasions where you want to have an EndNote library of only those references used in your Microsoft Word. You can then pass this EndNote library to a colleague. This feature may also be useful if you have a corrupted EndNote Library because if generates a new library of the references used in your Word Document
Preferences	Use the Preferences dialog box to change Cite While You Write preferences and keyboard shortcuts Word.

Word 2003

This section was written for EndNote X4, X5 is very similar.

Start writing your Word document, when you reach the point where you need to cite previously published work, click the **Find Citations** button on the toolbar.

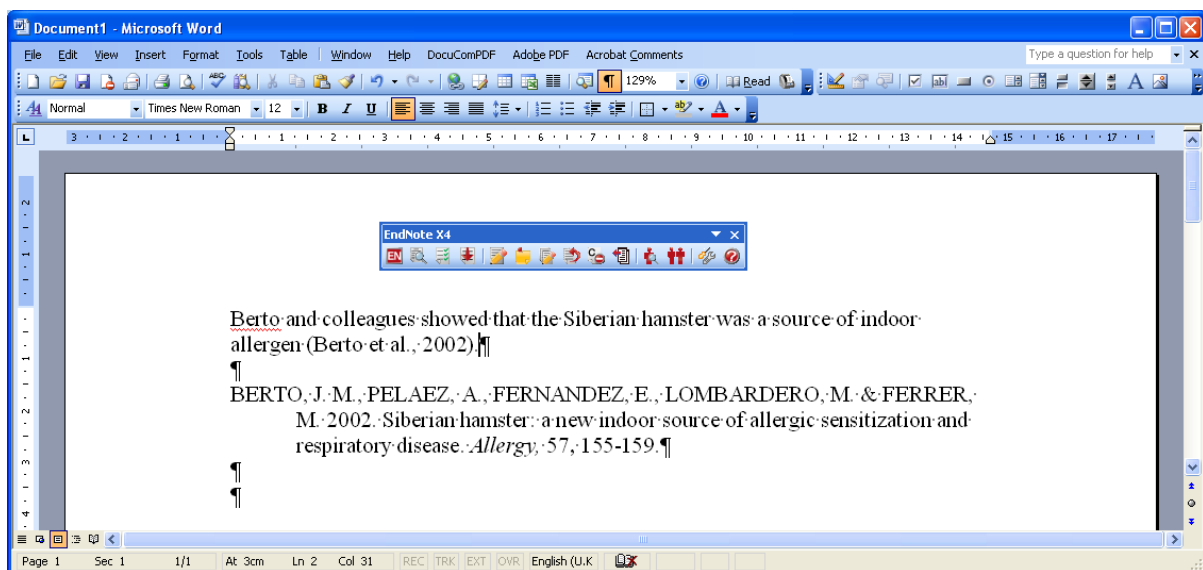An *EndNote Find &Insert My References* window is displayed.

Enter a term in the *Find* text box. It could be an author, for example **Berto**.

Click the **Find** button.

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Click the **Insert** button. The citation is inserted into your Word document and a reference list is created at the end of the document in the style of journal currently selected, *Harvard* in this case. The correct output style may need to be selected but you can do this after citations have been added.

The citation and reference are inserted as Word fields. You can see this by clicking on them. They have a grey background.
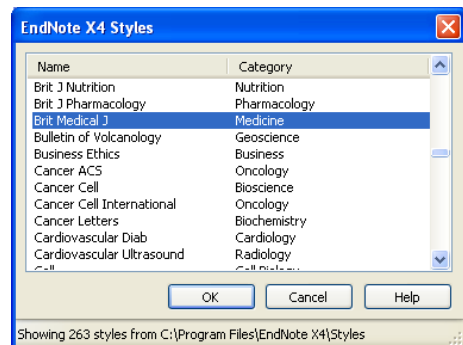
To change the reference list details click the **Format Bibliography** [icon] button.

Select the **Browse** button
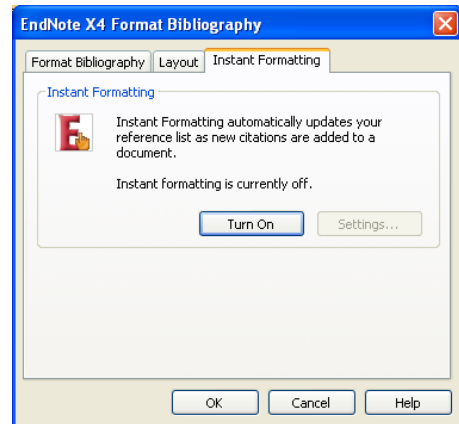
Scroll the Styles window to find the Medicine category and select the journal of your choice. The *Brit Medical J* (British Medical Journal) in this case.

Click **OK**.

Continue writing your document and when you need to cite additional papers use the **Find Citation(s)** button [icon] to search your EndNote references for them. In the example below two papers were found and added by entering '**hamster asthma**' as the search term.
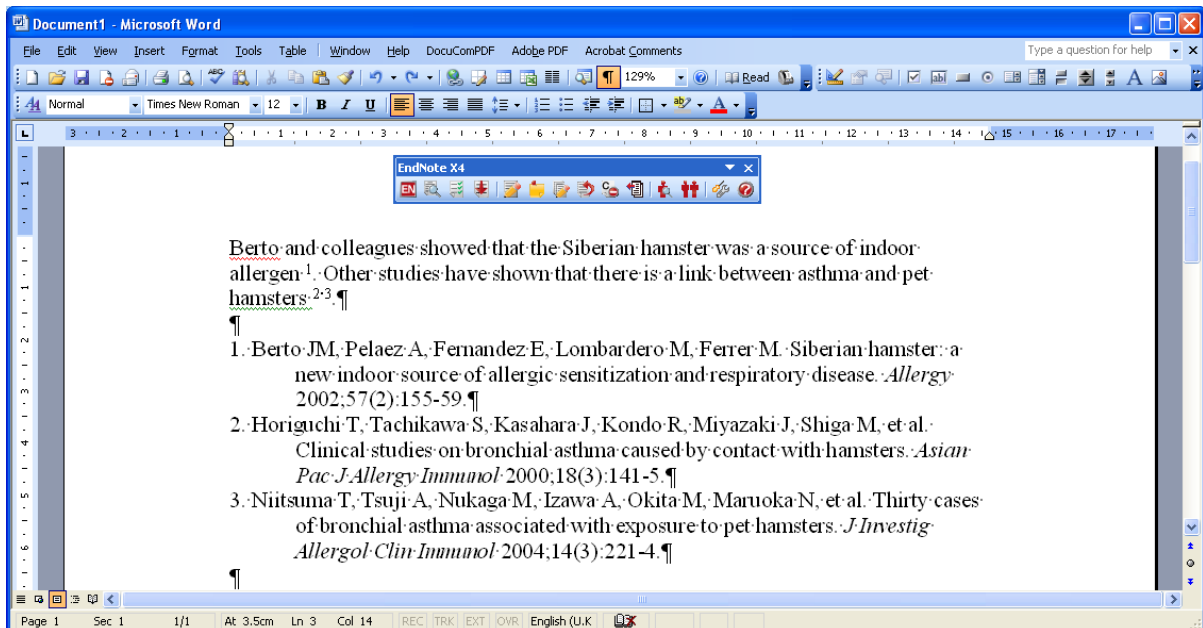
Tips on using CWYW

1. *Errors in Citations*. You may find errors in the reference list for the citations you have inserted. To correct this, select the citation in the text of your Word document. In the example reference 2 has been selected by dragging across it. Click the **Edit Library Reference(s)** button . This will open up the EndNote Edit window for the reference as described on page 6. Correct the error and select **File | Close Reference**, you will be asked if you want to **Save** the changes. You can return to Word by clicking the **Return to Word Processor** button . Click on the **Format Bibliography button** to rebuild the document with the corrected reference.

2. *Changing the order of, inserting or deleting citations*

   Click the **Edit & Manage Citations** button to display the window opposite. Here you can move the order of citations in a list using the buttons. Use the button to Edit the current reference (as above), Remove the current citation or Insert another citation.
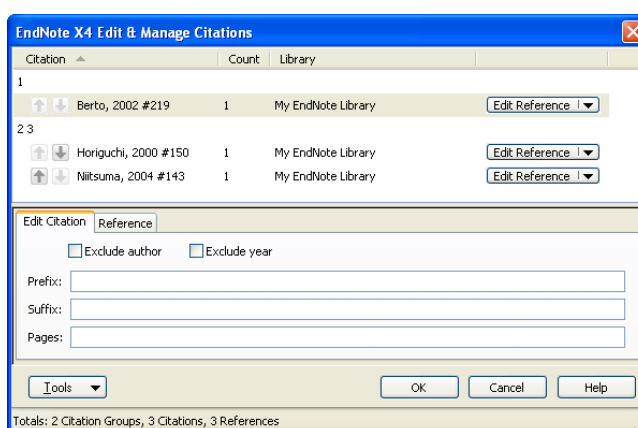
3. *Disabling the automatic generation of the reference list*

   On large documents, containing many references you may find that the Instant Formatting feature of rebuilding the reference list each time you insert a new reference is tedious and Word is busy for too long. Select the **Format Bibliography** button . A bibliography dialogue window is displayed. Select the *Instant Formatting* tab and click the **Turn Off** button.
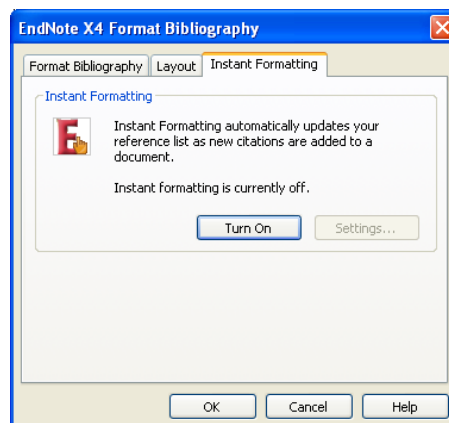
   Alternatively, select **Cite While you Write Preferences** button and untick the *Enable Instant Formatting on new Word documents* box. The automatic generation of the reference list is turned off.

   When you want to generate the full list of references use the button and use the features on the *Format Bibliography* tab.

Transferring references from Reference Manager

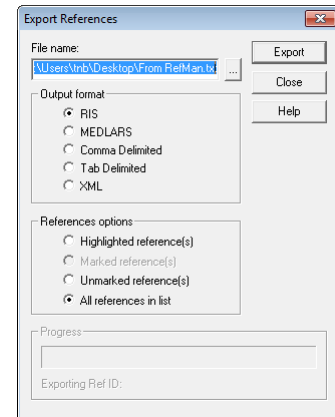It is easy to transfer references into EndNote from Reference Manager and vice versa.

In Reference Manager select **File | Export**.
Use the *Export References* dialogue to enter a file name.
Select either the *RIS* or *XML* as the Output format
Select *All references in list*.
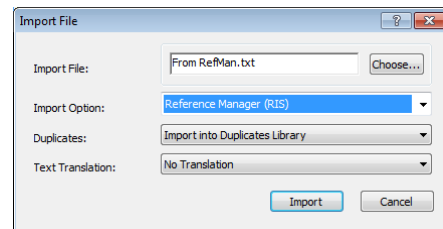Click **Export**.

In EndNote, select **File | Import | File**.
Use the *Import File* dialogue to locate the file exported from Reference Manager.
Select *Reference Manager (RIS)* as the Import Option (unless you used XML).
Decide how to deal with Duplicates.
Click **Import**.

Additional Resources and Training

- The University Library provides materials on the use of EndNote. See:
  www.southampton.ac.uk/library/infoskills/bibliographic/endnote/endnotetraining.html

- There are some online video tutorials on how to use EndNote at
  www.endnote.com/training/

- Use the Help menu to investigate the more advanced features of EndNote.

- Try looking at the EndNote Web FAQs
  http://www.endnote.com/support/faqs/index.asp to resolve problems

- Try the EndNote users forum
  http://forums.thomsonscientific.com/ts/?category.id=endnote

- The UK distributors site has useful information for resolving problems. Go to
  http://www.adeptscience.co.uk/products/refman/endnote/ and use the
  Service & Support section (bottom left of screen).