

# EndNote®

## **Getting Started**

EndNote can be downloaded on a 30-day trial basis from <http://www.endnote.com>. The software is available in both Windows and Mac versions. To purchase the software (currently \$92.58 per copy), visit General Stores at [http://www.utmem.edu/gen\\_store/](http://www.utmem.edu/gen_store/).

After installing the software, open it and click on Create a New EndNote Library. You should create a new library for each research topic.

## **Importing references into EndNote**

### **1. Typing references into EndNote**

This is the easiest (and slowest) way to add references to EndNote. Click on References and then New Reference.

#### ***Quick Tips***

- ◆ Enter each author on a separate line in the format lastname, firstname; e.g. Smith, John
- ◆ End corporate author names with a comma; e.g. Harvard Medical School,
- ◆ If the corporate name includes a comma, type two commas; e.g. University of Tennessee,, Knoxville
- ◆ Enter a 4-digit year in the Year field and the rest of the date in the Date field
- ◆ If your citation style calls for short titles in repeating citations, be sure to complete the Short Title field
- ◆ In the PDF field, click on References and then Link To, if you have the full text of the article saved on your computer
- ◆ In the Images field, click on References and then Insert Picture, if you have a picture from the article saved on your computer. Be sure to complete the Caption field as well.

### **2. Searching within EndNote**

This is an easy way to get references into EndNote, but doesn't provide very sophisticated search options.

#### ***Example: Searching PubMed within EndNote***

- ◆ First time: To setup PubMed in EndNote, click on Tools and then Connect .... Scroll down and select PubMed.
- ◆ Accessing PubMed: Once PubMed is set up, simply click on Tools, then Connect, and choose PubMed.

- ◆ Downloading references: Run your search and download the references to the temporary area. Then click on Edit and Select All to take all the references or Ctrl + click (⌘ + click on the Mac) to select individual titles. Click on Copy All References To, Choose Library and select your library.

### 3. Downloading from Databases

This is a little more work than option #2, but allows you to take advantage of the sophisticated search tools available in many of the library's databases. The following instructions cover four of the library's most popular databases: PubMed, Scopus, Ovid MEDLINE, and CINAHL. However, these are not the only databases from which citations can be extracted.

#### *PubMed*

- ◆ Select titles of interest and change **Display** to **MEDLINE**
- ◆ Only selected articles will display
- ◆ **Send to, File** and save the file
- ◆ With relevant EndNote library open, go to File -> Import and find the file.
- ◆ Set the filter (import option) to PubMed and import
- ◆ **References** -> **Show All** to see the whole library
- ◆ Double click on reference to see details

#### *Scopus*

- ◆ Select the results of interest and click on **Output**
- ◆ Change Export format to **RIS format**
- ◆ Output should be **Citations Only** or **Abstract Format** – others don't work properly
- ◆ Select your library to load the citations
- ◆ **References** -> **Show All** to see the whole library
- ◆ Double click on reference to see details

#### *Ovid MEDLINE*

- ◆ Select the results of interest and choose **Direct Export** and **Save**
- ◆ Select your library to load the citations
- ◆ **References** -> **Show All** to see the whole library
- ◆ Double click on reference to see details

#### *EBSCOhost CINAHL*

- ◆ Click **Add** next to titles of interest
- ◆ Click on **Folder has items, Export**
- ◆ **Direct Export to Endnote, Save**
- ◆ Select your library to load the citations
- ◆ **References** -> **Show All** to see the whole library
- ◆ Double click on reference to see details

#### **4. Copying References from an EndNote Library**

If you have references common to two research topics you can simply copy references from one library to another. You can also use this methodology to maintain a central library containing all your references, which can be useful for searching purposes.

With both libraries open, click on Edit and Select All to take all the references or Ctrl + click (⌘ + click on the Mac) to select individual titles in the first library. Click on Edit and then Copy. In the second library, click on Edit and then paste.

#### **Creating a Bibliography**

To create a simple bibliography you must first choose a citation style. Click on Edit, then Output Style, then Open Style Manager to select your favorite style. Then click on Edit, then Output Style to select it.

Next, select the titles to include by clicking on Edit and Select All to take all the references or Ctrl + click (⌘ + click on the Mac) to select individual titles.

Click on File and then Export and choose the rtf format for a bibliography in Word or html format for a bibliography to post on a web page or on Blackboard.

For more complex bibliographies, click on Tools, then Subject Bibliography.

#### **Adding Citations in Word**

##### **1. Using EndNote to add citations**

Ensure the cursor is at the appropriate place in the Word document to add the citation. In EndNote and select the citation you want to insert, then go back to Word and click on the square brackets with the down arrow.

##### **2. Using Word's EndNote toolbar to add citations**

Ensure the cursor is at the appropriate place in the Word document to add the citation. Click on the magnifying glass to search your EndNote library. Select a citation and click on Insert.

##### **3. Formatting citations in Word**

There are three steps to this process. In EndNote, click on Edit, then Output Style, then Open Style Manager. Check the needed style. Then go to Edit -> Output Style and select the style. Finally in Word, click on Tools, then EndNote, then Format Bibliography. Select the same style, and all your references will change to that style.

## **Getting More Help**

### **EndNote Product Training Website**

The EndNote Product Training Website at <http://www.endnote.com/training/> has links to online tutorials for EndNote 9 and X, which can be viewed any time.

### **EndNote Technical Support Page**

EndNote's technical support page at <http://www.endnote.com/support/ensupport.asp> provides access to the following services:

- ◆ A frequently asked questions list, divided into categories such as installing the software and output styles
- ◆ Program upgrades, connection files, and import filters, as well as forms to suggest new connection files and import filters
- ◆ User guides for EndNote 9, X, and X1
- ◆ Links to the EndNote mailing list, where EndNote users can post questions and receive advice from fellow users

### **EndNote Live Online Training**

EndNote's expert trainer hosts live, interactive, online classes that can be taken right from your desktop; they use Webex software, which runs on both the Windows and Mac operating systems. Upcoming classes are scheduled as follows:

- ◆ Building your EndNote Library. July 19, July 25, August 9, August 16, August 30. Classes start 12 noon or 5:00 pm.
- ◆ Formatting Papers in Microsoft Word. July 19, July 25, August 9, August 16, August 30. Classes start 2:00 or 6:00 pm.
- ◆ Advanced Filters. August 29, 12 noon.

For details and to sign up, visit <http://www.endnote.com/training/enwebinarform.asp>

### **UTK Bibliographic Management Tools web page**

The University of Tennessee, Knoxville has created a Bibliographic Management Tools web page at <http://www.lib.utk.edu/refs/endnote/>. In addition to many of the links listed above, the page also provides introductory information on EndNote, including helpful information on downloading references from EBSCO, TEL, JSTOR, and Ovid. An online tutorial provides an overview of creating an EndNote library, downloading references, and using EndNote with Microsoft Word. There is also information on which browsers function best with EndNote.

### **Getting Started Guides**

This free 88-page guide covers the use of EndNote X1 for Windows. Contact Jennifer Watson to obtain your copy via campus mail.

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