

A Quick Reference Guide to EndNote

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Contents

Part I: Obtaining References.....	2
Searching for references from within EndNote	2
Importing references into EndNote after browsing PubMed.....	2
Importing references from other databases or search engines	2
Importing references from a full-text PDF.....	3
Entering references by hand.....	3
Part II: Using References in Text	4
Inserting references into text	4
Creating the bibliography	5
Fixing problems with references.....	5
Removing field codes.....	5
Part III: Output Styles	6
Getting started	6
Making sure that citations are numbered	6
Formatting author lists	6
Formatting journal titles.....	6
Formatting page numbers	6
Changing the elements in the reference, or changing the order of elements	7
Part IV: Other Useful Information.....	7
Making references more accessible to other EndNote users.....	7
Formatting journal titles the way you want them	7
Sharing EndNote libraries	8
Troubleshooting	9

Part I: Obtaining References

Searching for references from within EndNote

Most useful when you already know which references you want to add to your EndNote library.

1. Open the EndNote library to which you want to add references
2. With either the *Online Search Mode* (the globe) or the *Integrated Library & Online Search Mode* (globe and books together) icon selected, choose the database you want (eg, PubMed [NLM] for journal articles, Library of Congress for books) from the Online Search menu on the left-hand side of the screen. If the database you want is not there, click *more...*
3. Use the search form to find the reference(s) you want. (Author, Year, and Title are the default search fields; you can click one of the + buttons on the right to add more.) If your search pulls up too many references, use additional search terms to narrow it down
4. Add the reference(s) to your library
 - a. If you have *Online Search Mode* selected, select the references you want to copy and click the *Copy To Local Library* icon on the toolbar (the icon with 2 sheets of paper and a red arrow going up and to the left)
 - b. If you have *Integrated Library & Online Search Mode* selected, the references you found are already in your library; just delete any that you do not want to keep

Importing references into EndNote after browsing PubMed

Most useful if you want to import references that you find while browsing PubMed.

1. In PubMed, whenever you find references you want, check the box next to each reference
2. In the *Send To* drop-down menu, select *Clipboard*
3. Click *Add to Clipboard*
4. Once you have found all the references you want, click on the hyperlink next to "Clipboard:" that shows how many items you have
5. In the *Send To* drop-down menu, select *Citation manager*
6. Click *Create File*
7. Save the file to your computer
8. In EndNote, go to File > Import and choose *File...*
9. In *Import Option:*, choose *PubMed (NLM)* (If you haven't done this before, you'll have to go to *Other filters...* and find the PubMed [NLM] filter there)
10. Click *Choose...* and select the saved file on your computer
11. Click *Import*

The references will now appear in your EndNote library.

Importing references from other databases or search engines

Most useful if you want to use the advanced search capabilities of Ovid, Scopus, Google Scholar, etc, to find references, including references that are not available through PubMed.

Each search engine or database has a different mechanism for transferring references to EndNote. For example,

- In **Scopus**, select your references and click the *Output* command button. Then select *RIS format (Reference Manager, ProCite, EndNote)* from the drop-down menu and click *Export*. At that point, you will have the option to *Open* (which saves references directly to an open EndNote library) or *Save* (which saves references to an RIS file that you can import later by using EndNote's RIS import filter)
- In **Embase**, check the boxes next to the references you want, then click *Export* (the one next to Results, not the one next to History). In *Export format:*, choose *RIS format (Mendeley, EndNote)* and click *Export >*. On the next screen that comes up, click *Download >*. Import the reference file into your library by using EndNote's RIS import filter
- **Ovid** has a radio button labeled *Direct Export*. Once you have selected the references you want to save, click that button, then click on the *Save* command button, and finally click the radio button for EndNote. The references will be saved directly to whichever EndNote library you have open
- In **Google Scholar**, click on the quotation-mark symbol beneath the reference. At the bottom of the window that pops up, select EndNote and save the file. Use the *EndNote Import File* filter to import the file into your library

Importing references from a full-text PDF

Often, if you have the full-text article in PDF format, EndNote can create a reference from it. (Note that this only works if the reference information is embedded in the PDF file in a way that EndNote can read, which may not be the case for PDFs of old articles, or articles from certain journals.)

1. In EndNote, go to File > Import and choose *File...*
2. In *Import Option:*, choose *PDF*
3. Click *Choose...* and select the saved file on your computer
4. Click *Import*

The reference will be added to your library with a copy of the full-text PDF attached.

Entering references by hand

Most useful when you simply cannot find a given reference in a downloadable format. Do this as a last resort, because hand-entering references creates the possibility of introducing errors.

1. Select References > New Reference
2. At the top of the pane, choose the reference type (journal article, book section, etc)
3. Enter all necessary information (You do not have to fill in every section, just the ones you will need to use in the citation)
4. For authors' and editors' names, use the format *last name, first name (or initials)*
 - a. Put a period after each initial
 - b. Start a new line for each author or editor
 - c. For suffixes like "Jr" and "III," put a comma between the author's first name or initials and the suffix
 - d. For institutional authors, put a comma at the end of the institution's name (Otherwise, instead of "Society of Thoracic Surgeons," you will get "Surgeons SoT")
5. When finished, close the pane. Your new reference will appear in the library

Note: References to book chapters do not have to be entirely entered by hand. Instead, you can do this:

1. Download a reference to the book (eg, from the Library of Congress, or one of the many university library catalogues you can access through Online Search)
2. Change the reference type from Book to Book Section
3. Move the book editors' names from the Authors field to the Editors field
4. Move the book title from the Title field to the Book Title field
5. Hand-enter the chapter authors' names, chapter title, and page numbers

To make a reference to a website:

1. In your web browser, go to the website
2. In EndNote, go to References > New Reference
3. From the dropdown menu for Reference Type, select *Web Page*
4. If the web page indicates who the author is (whether it is a person or an organization), put the author's name in the Author field*
5. If there is a publication year for the web page (sometimes it is in the fine-print copyright info at the bottom of the page), put it in the Year field*
6. Enter the web page's title in the Title field
7. Put the current year in Access Year and the month and day of today's date in Access Date
8. Paste the website's URL into the URL field
9. Close and save the reference

*If there is no information to put in these fields, leave them blank.

Part II: Using References in Text

Note: If the EndNote tab is not in the ribbon in Word, you may need to have EndNote reinstalled.

Inserting references into text

There are a lot of options for inserting references into text.

- This is one of the quickest ways:
 - a. In Word, put the cursor in the place where you want to insert the reference
 - b. In EndNote, highlight the reference you want. If you want to cite several references at once (eg, "1, 4-7"), hold down CTRL and click on each reference
 - c. In EndNote, click the *Insert Citation* icon
- This way works well if you can put EndNote and Word side by side on your screen(s):
 - d. Click the reference you want and drag it to the place where you want to put the citation
 - e. If you want to do this with multiple references at once, use CTRL to select them, then drag them
- Type the first author's surname (and the year, if you wish) in braces (curly brackets), like so: {Smith,1998}. EndNote will use this information to retrieve the reference later when you create the bibliography (see below)
- On the EndNote toolbar, click the *Insert Citation* icon (above the Insert Citation dropdown menu), then search for the citation you want and insert it (This is handy if you have a very large library and cannot easily find the reference by browsing through it)

Creating the bibliography

If you have Instant Formatting turned on, each new reference citation will format itself the moment you insert it, and the reference will be added to the bibliography at the end of the document. If you want to turn Instant Formatting off:

1. Go to the EndNote tab in Word
2. Click the dropdown arrow next to *Instant Formatting is On* and select *Turn Instant Formatting Off*

Later, when you want to format the references:

1. In the EndNote tab, select the output style you want from the Style dropdown menu (Click *Browse* to see the entire list of available output styles.)
2. Click the tiny arrow at the bottom right of the Bibliography group
3. In the Layout tab, make sure the font, type size, line spacing, indents, and heading for the References section are set the way you want them
4. Click *OK*

Note: The first time you format references in a given document, the bibliography will appear at the end of the document. If you want it to appear somewhere else in the document, you can cut and paste it.

Fixing problems with references

- If a reference looks wrong because of errors in the original citation (eg, an author's name was misspelled in PubMed), you can correct these errors by opening the reference in EndNote, fixing the errors, and clicking *Update Citations and Bibliography* to re-run the bibliography
 - If a reference title is in title case (eg, Transcatheter Aortic Valve Replacement...) and needs to be in sentence case (Transcatheter aortic valve replacement...), select the title and use SHIFT+F3 to cycle through cases
- You can fix problems with reference format by editing the output style you are using (see Part III: Output Styles)
- 5. If all else fails, you can fix problems directly in the Word document after you remove the field codes (see below). Note that if you don't remove the field codes first, the changes will be lost the next time the bibliography is updated.

Removing field codes

EndNote field codes can cause errors when journals do the layout of your article. To prevent this, you can remove the field codes before the document is submitted.

1. In the EndNote tab in Word, click the *Convert Citations and Bibliography* dropdown menu and select *Convert to Plain Text*
2. EndNote will create a new version of the document without field codes; save it under a different name than the coded version (It is a good idea to keep the coded version in case further changes are needed later)
3. If something goes wrong and you can't remove all of the field codes for some reason, select the coded text and hit CTRL-SHIFT-F9, which will strip all field codes from the document

Part III: Output Styles

Sometimes, the output style that EndNote uses for a particular journal is inaccurate or outdated. You can fix this by editing the output style you want to use.

Getting started

1. Go to Edit > Output Styles
2. If you are currently using the style you want to edit, you can select it from the menu. Otherwise, click *Open Style Manager...*, select the style you want to edit, and click *Edit*

Making sure that citations are numbered

1. Select Citations > Templates
2. Click *Insert Field* and choose *Bibliography Number*
 - a. If the journal requires that reference numbers be superscripted, select the Bibliography Number field you just inserted and click the superscript button (A^1) on the toolbar
 - b. If the journal requires that reference numbers be enclosed in parentheses or brackets, put parentheses or brackets around the Bibliography Number field
3. Select Citations > Numbering
4. Make sure the box next to *Use ranges...* is checked
5. To make sure that references are numbered in the References section, select Bibliography > Layout
6. Click Insert Field > Bibliography Number. Type in a period and a space (or whatever the journal uses) after the bibliography number field

Formatting author lists

1. Click Bibliography > Author List
2. Set the separators between authors to whatever you need (usually commas or periods)
3. Click Bibliography > Author name
4. Usually, you want to set First Author and Other Authors to *Smith Jane* and *Doe John*
5. Leave capitalization *As Is*
6. Set initials to according to the style the target journal uses (*AB* is most common)

Formatting journal titles

1. Select *Journal Names*
2. Choose the format you want:
 - a. Full title
 - b. Abbreviation 1 = abbreviated title with periods
 - c. Abbreviation 2 = abbreviated title without periods

Formatting page numbers

Select *Page Numbers* and choose the format you want.

Changing the elements in the reference, or changing the order of elements

Select Bibliography > Templates

- To add a field, select it from the *Insert Field* list
- To remove a field, just delete it
- To add other elements (eg, spaces, punctuation, or words like “In:” or “Eds”), just type them in

Note: You can trade output styles with other EndNote users. You can find the files in the EndNote\Styles folder on your computer.

Part IV: Other Useful Information

Making references more accessible to other EndNote users

When a reference is added to an EndNote library, EndNote assigns it a *record number*. This number cannot be changed and is completely arbitrary; the same reference, when imported into two different EndNote libraries, will probably have two different record numbers. EndNote’s default setting is to use these record numbers when creating temporary citations, which can make it difficult to share documents between EndNote users who are not using the same EndNote library.

To solve this problem, you can have EndNote use the reference’s *accession number* instead of its record number when it creates temporary citations. Any reference downloaded from Medline (whether via PubMed, OVID, or another search engine) has a unique accession number that will be the same in every EndNote library. To set EndNote to use accession numbers instead of record numbers:

1. Go to Edit > Preferences...
2. Select *Temporary Citations* in the left-hand menu
3. Check the box labeled *Use field instead of record number*
4. From the drop-down menu next to the box, choose *Accession Number*
5. Click *OK*

Formatting journal titles the way you want them

The Journal field in an EndNote reference may not always have the journal title formatted the way you want. It may be spelled out when you need it abbreviated, it may be in the wrong case (eg, “Jama” instead of “JAMA”), or it may not be the form of the title that you want (eg, “Advances in Clinical Pathology : The Official Journal of Adriatic Society of Pathology” instead of “Adv Clin Pathol”).

The Journals term list helps you deal with these problems by letting EndNote know which form of the journal title to use when you format your bibliography. Each EndNote library has its own Journals term list. When you create a new library, this list is empty. To populate it with useful information:

1. Select Tools > Open Term Lists > Journals Term List
2. In the Terms tab, select any existing terms in the list and delete them (EndNote may have added some terms to the list when you imported your references, but these terms aren’t complete and should be removed before you create your new Journals term list)
3. In the Lists tab, click *Import List*

4. In the Program Files > EndNote > Term Lists folder on your computer, you will find several lists of terms, such as Chemical, Humanities, and Medical. Import the list you want to use
5. Click *Close*

If some articles cited in your manuscript are from journals that don't appear on the list, you can add them.

1. Select Tools > Open Term Lists > Journals Term List
2. In the Terms tab of the Term List box, click *New Term*
3. Type the full journal title in the Full Journal box (eg, "Archives of Internal Medicine")
4. Type the abbreviated title *with* periods in the Abbreviation 1 box (eg, "Arch. Intern. Med.")
5. Type the abbreviated title *without* periods in the Abbreviation 2 box (eg, "Arch Intern Med")
6. If there is some third version of the journal title that appears in some of your EndNote references (eg, "Archiv Intern Med"), type that in the Abbreviation 3 box. Otherwise, just leave this box empty
7. Click *OK*
8. Click *Close*

If you want to use your updated Journals term list in other EndNote libraries, you can export it to a text file (using the *Export* button in the List tab of the Term List box) and then import it into other libraries.

Sharing EndNote libraries

When working with coauthors or editors who use EndNote, if you and they have access to the same server, you may want to put your EndNote library on that server so that you can all work from it.

If that isn't an option, and you are sending drafts of your document back and forth by email, you may want to send the latest version of your EndNote library along with the document. Otherwise, if you have added new references to the library or changed existing references since your coauthor last worked with the library, your coauthor will have trouble working with the new references, and the changes you made will disappear the next time your coauthor updates the bibliography.

The best way to send someone an EndNote library (or a subset of references from one) is to send it as a compressed library:

1. Go to File > Compressed Library (.enlx)
2. In the dialog box that appears, you can choose whether you want to send the whole library or just a subset of the references (eg, just those you have added or changed since you received the library from your coauthor). You can also choose whether you want the compressed library to include any files that may be attached to the references (eg, PDFs of the full-text article)

If an author sends you a document with EndNote references in it but does not send an EndNote library, your options are to (1) export the traveling library from the Word document or (2) ask the author to send you the full library. The traveling library will sometimes do, but you may need the full library if:

- You want to look at the abstracts of the references. (Traveling libraries do not include the abstracts.) You can get them by using References > Find Reference Update..., but this can take a while if you have a lot of references

- The full library contains full-text PDFs or other attached files that you need
- Some sort of corruption in the document prevents you from exporting the traveling library

Troubleshooting

Page Number Problems. Some references include a separate set of page numbers (eg, *discussion* and *table of contents* page numbers) that follow the main page numbers. There are two ways in which these extra page numbers can be problematic when you are formatting a bibliography:

1. When you use a reference style in which page numbers are abbreviated, EndNote will abbreviate every number after the first one (eg, page numbers that should be listed as “893-5; discussion 896-7” will be listed as “893-5; discussion 6-7” instead). There is no easy fix for this; you have to either (1) change the output style so that the page numbers are displayed the way they are listed in the EndNote reference (which only works if they are already listed the way you want in every reference) or (2) remember to fix the problematic page numbers manually when you are otherwise finished with the references and can remove the EndNote field codes from the document.
2. When you are using a reference style in which page numbers are fully listed, these additional page numbers may be listed incorrectly if the additional page numbers start with a different digit than the first main page number (eg, page numbers that should be listed as “487-502; discussion 503-504” may be displayed instead as “487-502; discussion 403-404”). This happens when the page numbers are abbreviated in the EndNote reference, and the problem can be fixed by editing the reference so that the full page numbers are listed in the Pages field.

Changes Made to References in the EndNote Library Don’t Appear in the Bibliography. If you make changes to a reference in the library and you find that the change doesn’t appear in the bibliography, try this:

1. In the EndNote tab in Word, click *Update Citations and Bibliography* (because even if Instant Formatting is on, EndNote may not have reformatted the bibliography since you made the change in the library)
2. If that does not work, try this:
 - a. If only 1 reference is affected,
 - i. delete the citation in the Word document and then reinsert it
 - b. If several references are affected,
 - i. If Instant Formatting is on, turn it off
 - ii. In the EndNote tab, click *Convert Citations and Bibliography* and choose *Convert to Unformatted Citations* (This will change all of the reference citations back into temporary citations like this: {Abizaid, 2001 463982})
 - iii. Click *Update Citations and Bibliography* to recreate your bibliography
3. If even this doesn’t work, then it is possible that 1 or more reference citations in the document have become corrupted. To find out,
 - a. Use *Convert to Unformatted Citations* again to convert the references to temporary citations

- b. Look through the document for any citations that did not convert (ie, that still appear as superscripted numbers, numbers in brackets, or whatever the format is)
- c. For each faulty citation you find,
 - i. Select the citation and press CTRL + SHIFT + F9 to remove its EndNote field codes and turn it into normal text
 - ii. Delete the faulty citation
 - iii. Reinsert the reference(s) that should be cited in that spot
- d. Click *Update Citations and Bibliography* to recreate your bibliography

When you are using Track Changes in Word, deleted reference citations come back when you reformat the bibliography. If this happens, here is a solution:

1. Delete the reference citations again
2. Select the deleted citations and press CTRL + SHIFT + F9 to remove their EndNote field codes
3. Reformat the bibliography again. Now, the deleted citations should stay deleted
4. Subsequently, if you need to delete other reference citations in the document, accept the tracked deletions after you make them, or else delete the citations with Track Changes turned off

When you use Convert to Plain Text to remove EndNote field codes from a document that has line numbering, the new, field-code-free document does not have line numbering. It is not clear why this happens, and there is no way to prevent it. You just need to watch out for it and, if it happens, add the line numbers to the new document.