

EndNote X5 Overview

Contents

Introduction: uses, downloading and getting assistance	3
Back up and uninstall EndNote	3
Create an EndNote library	4
Sending citations from a database to EndNote.....	4
Import citations from PubMed.....	4
Export citations from CINAHL.....	5
Import citations from PsycINFO	5
Download additional Import Filters from EndNote.com.....	6
Identify and use EndNote Functions	7
The Quick Search Window	7
Output styles (citation formats)	7
Change the output style	7
Import additional citation styles	8
Get the Full Text	8
Invoke the DOI to URL function.....	9
Change Abbreviated Journal Title to Full Journal Title.....	10
View or modify a reference	11
Manually add a reference to EndNote	11
Organize References with Groups.....	11
Create a Custom Group.....	11
Create a Group Set	11
Create a Group from Existing Groups.....	12
Establish a Smart Group	12
Print, Save, Share.....	12
Use EndNote with Microsoft Word 2010	14
The Format Bibliography menu.....	14
Cite While You Write	14
Edit or Delete a Citation in the Text or Bibliography.....	15
Edit an In-text Citation	15

EndNote X5 Overview

Delete an entry from the Bibliography.....	15
Edit a Reference from the Bibliography	15
Find the bibliographic entry for an in-text citation	15
Remove the EndNote formatting from the Document	15

EndNote X5 Overview

Introduction: uses, downloading and getting assistance

You'll use EndNote to:

- Store and manage citations and full-text
- Organize your bibliographic materials
- Create a manuscript with references in Microsoft Word

Where to get EndNote

- Hospital and KUPI: contact Phil Ellis, 5-5544
- University: Download from [myKUMC](#)
 - Click **Computing**→ **Software Download**
 - Scroll to the links for EndNote X5

If a previous version is already on your machine, before you install EndNote, use the instructions that follow to uninstall your current version of EndNote.

Back up and uninstall EndNote

Mac users

- Open your EndNote library and click **File**→ **Save a Copy** to create a backup of your library
- Save the copy to an external device, such as a flash drive or external hard drive
- Click **EndNote** → **Customizer**→ **Uninstall**
- Click **Applications**, scroll to EndNote and move it to the **Trash**

Windows users

- Open your EndNote library and click **File**→ **Save a Copy** to create a backup of your library
- Save the copy to an external device, such as a flash drive or external hard drive
- Go to the **Control Panel** of your computer
- Find **Change/Remove Programs**
- Locate EndNote in the list of programs
- Click the option to **Remove**

Get assistance with EndNote

- Dykes Library at 913.588.7166
- Dykes Library EndNote Resources: <http://library.kumc.edu/resources/EndNote.htm>
- EndNote Customer Support: 800.336.4474
- EndNote Support Materials: <http://www.endnote.com/support/ensupport.asp>

EndNote X5 Overview

Build and work with an EndNote library

Organize your work

Designate a location on your computer to store your EndNote library

Attention Windows users: For best results, particularly with accessing pdfs attached to EndNote references, save your library to the Desktop, or at the topmost level of Documents or a file server. If the file path exceeds 255 characters, pdfs will not open!

- EndNote creates two files: *.enl* and *.data*
- Once it's created, you can open the library by clicking the *.enl* icon

Create an EndNote library

1. Click **Start**→**Programs**→**EndNote**
2. Click **Finish** to bypass the EndNote Web setup
3. Click the **Create a New Library** icon
4. Decide where you want to save your library and navigate to that area (desktop, documents, etc)
5. Either rename or accept the default library name (*My EndNote Library.enl*)
6. Click **Save**

Sending citations from a database to EndNote

These instructions are written for Internet Explorer and EndNote. If you're using Chrome, Firefox or Safari, adapt the instructions to function with your browser.

Import citations from PubMed

Do a PubMed search

1. Always launch PubMed from the Dykes Library website (<http://library.kumc.edu>)
2. Execute a search and click the checkboxes to make selections
3. Click **Send to** and select **File**
4. From the **Format** pull-down menu, select **MEDLINE**
5. Click **Create File**
6. Save to the Research folder on your desktop
 - a. There is no need to rename the file: save as *pubmed results.txt*
7. Click **Close** to quit the Download Complete dialog box

EndNote X5 Overview

Import PubMed citations into EndNote

1. Go to EndNote
2. Click **File**→**Import**→**File**
3. At the Import File window, click **Choose** →*pubmed results.txt*→**Open**
4. From the **Import Option** drop-down list, click **Other Filters** and scroll to **PubMed(NLM)** and click **Choose**
5. From the **Duplicates** drop-down list, select **Discard Duplicates**
6. Leave the **Text Translation** option on **No Translation**
7. Click **Import**

NOTE: If the citations from PubMed do not appear in the EndNote window, return to PubMed, save the file again. Make sure that the **Format** option is set to **MEDLINE**.

Export citations from CINAHL

Search CINAHL

1. Go to CINAHL, enter search terms, and click **Search**
 - a. Always launch CINAHL from the Dykes Library website (<http://library.kumc.edu>)
2. Select citations by clicking **Add to folder**
3. Click the **folder icon** or the **Folder View** link to review selected citations
4. Click **Select/deselect all**
5. Click the **Export** icon
6. **Direct Export to EndNote...** is the default setting
7. Click **Save**
 - a. If EndNote is open, the citations will be displayed as **Imported References**
 - b. If EndNote is not open, you will be prompted to open a Library

Import citations from PsycINFO

Search PsycINFO

1. Always launch PsycINFO from the Dykes Library website (<http://library.kumc.edu>)
2. Execute a search and click the checkboxes to make selections
3. Click the **Marked Records** link near the top of the page
4. Click **Save,Print,Email**
5. From the **Format** pull-down menu, select **Full format**
6. Choose the File Format for PC, Macintosh, or Unix and click **Save**

EndNote X5 Overview

Import PsycINFO citations into EndNote

1. Go to EndNote
2. Click **File**→**Import**→**File**
3. Click **Choose**→*csa results.txt*→**Open**
4. **Import Option**→**Other Filters**→**PsycINFO (CSA)**
5. **Duplicates**→**Discard Duplicates**
6. **Text Translation**→**No Translation**
7. Click **Import**

Download additional Import Filters from EndNote.com

1. Go to <http://www.endnote.com/>
2. Click **Support & Services** (red bar near the top of the page)
3. Click **Import Filter** (left side of the page)
4. Scroll through **Terms of Use** and click **Accept**
 - a. You may **Sort by** Information Provider, Database, or Date
 - b. Click **Re-sort Files**
 - c. NOTE: The **Information Provider** is the entity or company that produces the database content. For instance, the Information Provider for PubMed is the National Library of Medicine. You'll find the name of the Information Provider on the database website. Look on the database itself for a logo or company name. If you can't find it, call the Dykes Library Public Services desk: 913-588-7166.
5. When you find the Database and Information Provider you want, click the **Download** link→**Open**
6. The style will open in EndNote's **Filter Manager**
7. Click **File**→**Save As**→**Save**
8. This filter will now be available when you click **File**→**Import**→**Other Filters**

EndNote X5 Overview

Identify and use EndNote Functions

The Display Window

1. From the icons in the upper left corner , choose the display you want: library with online search, library only, online search only
 - a. With your mouse, hover over the icons to view the labels
2. Click the tops of the columns (Author, Year, etc) to change the order in which the citations are displayed
3. Double-click a citation to view the entire record

The Tab Pane

1. **Preview**
 - a. Click a reference to see the citation display in the lower section of the screen
 - b. This view allows you to see how the citation will be displayed in a bibliography
2. **Search**
 - a. Use this search window to search multiple fields within your EndNote Library
 - b. Use the options in the drop-down list to search the content in pdfs, including your notes
 - c. Use this window to search external resources
3. **PDF & Quick Edit**
 - a. Access and edit references
 - b. Read and annotate pdfs
4. You may choose to **Hide** or **Display** the Tab Pane

The Quick Search Window

1. Use the **Quick Search** window on the toolbar to search any content from your references or pdfs.
2. For more complex searches, use the **Search** option on the **Tab Pane**

Output styles (citation formats)

1. The initial citation format you see is **Annotated**.
2. This format includes an abstract, if the abstract is included with the citation.

Change the output style

1. From the pull-down menu showing **Annotated** (upper left corner), click to select a style and view from the **Preview** tab in the lower section of the screen.
2. Choose **Select Another Style...** to view the available formats
 - a. Click the top headers to view the list by alphabet or by discipline
3. Select and double-click a citation format to view with the Preview tab

EndNote X5 Overview

Import additional citation styles

EndNote X3 is installed with 100 citation styles. Use the instructions that follow to install additional styles.

1. Go to EndNote's website: <http://www.endnote.com/enhome.asp>
2. Click the **support & services** link (top of page)
3. Click **Output Styles** (left column)
4. Scroll through and read **Terms of Use** and click **Accept**
5. Under **Style Finder** tab, enter **Publication Name**, use pull-down menus to select **Citation Style** or **Discipline** or scroll through the list to find a style
6. Click the **Download** link for the selected style
7. Click **Open**→**Open with** and navigate to EndNote X3
8. EndNote's **Style Manager** opens for the selected style
9. Click **File**→**Save As** and rename, if appropriate
10. Click **Save**

Get the Full Text

Set up connection to link to FindIt!@KUMC (OpenURL Connection)

This will streamline access to Dykes Library's electronic subscriptions.

NOTE: This is a one-time setup on your machine.

1. Click **Edit** →**Preferences**, and choose **Find Full Text**
2. Click to check all four boxes : ISI Web of Knowledge Full Text Links, DOI, etc.
3. Type the following text into **OpenURL Path**: <http://mt8fd2he2v.search.serialssolutions.com/>
4. Click **OK**.

Use EndNote's Find Full Text

1. Select the records for which you want to attach the full text
2. Click the **Find Full Text** icon (left of the Title column) from the toolbar
3. Review the Copyright notice and click **Ok**
4. Use the **Find Full Text** indicator in the left column to monitor progress
5. The paper clip at the far left of the record indicates that the full text is attached
 - a. The pdf is stored in the EndNote *.data* folder
6. To open the pdf: select the reference and click the **yellow** folder from the toolbar or click the **PDF & Quick Edit** tab

NOTE: This process does not find all full text available via the Dykes Library. Use a manual process or **OpenURL** to identify and attach additional full text.

EndNote X5 Overview

Use Open URL function to find full text (connect to FindIt@KUMC)

1. Right click a reference, then select **URL→Open URL link**
 - a. This should open a window for FindIt!@KUMC
 - b. If the FindIt!@KUMC window does not open, return to Edit→Preferences→Find Full Text and re-type the url
2. If the paper is available online, you'll see a link to **Article**. Click this link, then find and click the link for the pdf.
3. Save the pdf to your computer.
4. Return to EndNote and right click the reference.
5. Select **File Attachments→Attach File**, navigate to the pdf, and double-click to attach
6. Since the pdf is stored in EndNote's *data* folder, you may delete the pdf from your computer

Add pdfs from locations on your computer

EndNote will import pdfs from a location on your computer or from an external drive. If the DOI is available, EndNote will create a record, including abstract and keywords, for each document.

1. Click **File→Import→Folder**
2. Click **Choose** and navigate to the folder which holds the pdfs
3. Click to select the folder and click **Ok**
4. Click **Import**

If the DOI is not available, EndNote will import the pdf without the complete record. You'll need to import the full record from a database and re-attach the pdf.

Invoke the DOI to URL function

According to APA 6th (and other) rules for journals accessed electronically, the DOI (Digital Object Identifier) number must be included in the bibliography. If the DOI number is unavailable, the URL for the journal is to be substituted.

1. Choose APA 6th (or the style of choice) from the **Output Style** window
2. Click **Edit→Output Styles→Edit APA 6th**
3. From the **Bibliography** section, click **Field Substitutions**
4. Click to select the checkbox at **If the DOI field is empty, use:**
5. Delete **DOI** and type **Retrieved from**
6. Click **File→Save**
7. Close the Style Editor from the upper right corner
8. Use the Preview tab to review reference
9. If neither the DOI nor the URL are displayed, find the URL for the journal and edit the reference to include the URL

EndNote X5 Overview

Change Abbreviated Journal Title to Full Journal Title

Set up the Journals Term list

- a. The Journals Term list contains the full titles and 2 sets of abbreviations for journals in several disciplines, such as medicine, law, and the humanities. These lists are needed to incorporate the full journal title and to choose journal abbreviations.
- b. Click **Tools**→**Open Term Lists**→**Journals Term List**
- c. Before adding the journals term list, you must delete the current list of journals in your library
 - i. Select all of the titles listed under **Full Journal**
 - ii. Click **Delete Term**
- d. Click **Lists**→**Import List**
- e. Navigate to **C:\Program Files\EndNote X5\Term Lists\Medical**
- f. Click **Open**
- g. After the list is populated with the journal titles and abbreviations, click **Close**

NOTE: This list will not have every journal title available from literature searches, and some of your references will still have the abbreviated title. In these instances, return to the Journals Term list and click **New Term** to add the full journal title and abbreviations

Edit APA 6th (or style of choice) to incorporate the full journal title

Depending on the databases from which you import references, you might need to make changes to EndNote so the full journal title displays. For instance, records imported from PubMed will incorporate the standardized abbreviation from the National Library of Medicine.

1. Click **Edit**→**Output Styles**→**Edit APA 6th**
2. Click **Journal Names**→**Use full journal name**
3. Close window and accept changes for *APA 6th Copy*
4. Open the **Style** menu and select *APA 6th Copy*
5. Use the **Preview Pane** to review the journal title

EndNote X5 Overview

The Reference Template

View or modify a reference

1. Click to select a reference, then click **Quick Edit** from the Preview section to view or modify a reference
2. Or, double-click a reference to view or modify.

Manually add a reference to EndNote

1. Click **References**→**New Reference**
2. Use the **Reference Type** pull-down menu to select a template
3. Type the citation information into the designated fields, using the Tab key to move among the fields.
 - a. For multiple author names, type one name per line
 - b. Use the Enter key to move to the next line within a field
 - c. Use periods after initials, but no other punctuation, with the exception of Corporate Names and other entities: *National Institute of Arthritis and Musculoskeletal and Skin Diseases*; End these entries with a **comma**.
4. Use the Preview Pane to check the accuracy of the entry. The data will be displayed according to the citation format selected.

Organize References with Groups

Organize with My Groups

You may use a single EndNote library that holds citations representing a variety of topics or disciplines, using My Groups to create levels of organization. A Group is comprised of citations.

Create a Custom Group

1. Use the **Quick Search** box to search your library
2. Select the citations and right-click
3. Select **Add References To**→**Create Custom Group**
4. Type a name for the Group
5. Once groups are created, you may drop and drag references to the group.
6. References may belong to more than one Group.

Create a Group Set

You may create a 'folder' structure for Groups. A Group Set is comprised of Groups, not individual citations.

1. Right-click **My Groups**
2. Click **Create Group Set**
3. Drag a **Group** or **Smart Group** to the Group Set

EndNote X5 Overview

Create a Group from Existing Groups

You must have at least 2 Groups established. You can then create another Group from references in existing Groups.

1. Right-click **My Groups**
2. Click **Create Group from Groups...**
3. Type a name for the new Group
4. From the section **Include References in:** click to select a Group
5. Go to the next line and select a different Group
6. Click **Create**
7. This new Group will be automatically updated as new references are added to the original Groups

Establish a Smart Group

Smart Groups will be automatically updated when new references are added to your EndNote library.

1. Click the **Search** tab (next to **Preview**),
2. Select one or more fields to search (Any Field, Author, Keyword, etc),
3. Type term(s) to search within your EndNote library
4. Click **Search Whole Library**
5. View the results displayed above
6. Click **Options**→**Convert to Smart Group**
7. Type a name for the group.
8. When citations matching the search criteria are added to your EndNote library, they will be automatically added to the corresponding Smart Group

Print, Save, Share

Print a bibliography

1. Select references
2. Choose a citation output style
3. Click **File**→**Print Preview**→**Print**

Save an EndNote library

1. Click **File**→**Save a Copy...**
2. Choose a destination for your saved library
3. Note the default File Name: *My EndNote Library Copy*
4. Click **Save**

EndNote X5 Overview

Share an EndNote Library

The following instructions provide the steps to follow for preparing an EndNote library for email and incorporating emailed references into a different EndNote library. Practice by creating a compressed library, attaching and emailing the compressed library to yourself, then add the emailed references to another EndNote library:

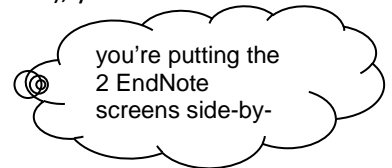
1. create a compressed library
2. email a compressed library
3. open a compressed library
4. drag or copy references from the compressed library to your own library (“home” library)

Email an EndNote library

1. Click **File**→**Compressed Library (.enlx)**
2. Make choices to create or create and email, with or without the file attachments
3. Select which references to send
4. Click **Next**
 - a. **Create:** Save the file.
 - i. When you’re ready to email, you’ll attach the enlx file.
 - b. **Create & Email:** Save the file.
 - i. Select your email provider.
 - ii. Your email will be launched with the enlx file attached.

Open a Compressed Library and Combine References

1. From the email attachment, **right-click**→**Open**
 - a. For a few seconds, you’ll see a message indicating that EndNote is Extracting the references
2. Open your own EndNote library (“home” library)
3. If you minimize both libraries (click the horizontal line from the **inner** window), you can see that they are both open and available
4. Restore one library and re-size so that it takes up ½ of the screen
5. Restore the second library and re-size so that it takes up ½ of the screen
6. Click to select the references from the emailed library
7. Use your mouse to drag the highlighted references to the “home” library
8. If **All References** is selected when you drag in the new references, those references are automatically added to the **All References** group. But, they will be displayed as **Unfiled**. When the new references are added to a **Group**, the **Unfiled** designation will go away.
9. If a **Group** is selected when you drag the new references in, those new references will be added to that **Group**
10. When you close the inner window that contains the emailed references, that emailed library will not display, unless you retrieve it again from your email.



EndNote X5 Overview

Use EndNote with Microsoft Word 2010

Open Word 2010

1. Click **Start Programs**→**Microsoft Office**→**Microsoft Word 2010**
2. Click the EndNote X5 tab for EndNote options

The Format Bibliography menu

You will use these options to select settings for the way citations are displayed in the text and bibliography of your manuscript.

1. From the **Bibliography** section of the EndNote options (the middle section), find and click the arrows in the lower right corner
 - a. The **Format Bibliography** menu opens
2. The **Output Style** matches the current format chosen in EndNote.
 - a. At any time, you may use the pull-down menu or click **Browse** to change the citation format.
3. Click **Layout** to change Font, Line spacing, etc. and to type a Bibliography Title (References, Bibliography, etc)
4. **Instant Formatting** is on, by default. Your bibliography will be listed at the bottom of your text as you write.
5. Click **Turn Off** to disable **Instant Formatting**.
 - a. In-text citations will be displayed with brackets (**Temporary citation delimiters**), instead of parentheses.
 - b. Change these delimiters from the first tab in the Format Bibliography menu
 - c. The EndNote record number will be included.
6. Click **Update Citations and Bibliography** to turn **Instant Formatting** back on.
 - a. This is a toggle that can be turned on and off during your writing process.

Cite While You Write

You can use a printed bibliography, listing references by author, as a guide for selecting citations.

1. Click **Insert Citation**→**Find Citation**
2. Enter any word from your EndNote references (author, keyword, etc) and click **Find**
3. Select the citation and double-click to insert
4. Or, select the reference and choose an option from the **Insert** drop-down list (exclude Author, Year, etc)
5. The references used for each Word document will be displayed in a unique **Group** in EndNote

EndNote X5 Overview

Edit or Delete a Citation in the Text or Bibliography

Edit an In-text Citation

Use the EndNote citation editor in Word to make changes to citations and bibliographies. Never type changes into the citation or bibliography.

1. Click **Edit & Manage Citation(s)**
2. Click to select the reference to be edited
3. From the lower section of the screen, click the **Reference** tab to view the entire record
4. From the **Formatting** drop-down list, you may remove the author or year
5. At the **Pages** window, add page numbers to the in-text citation

Delete an entry from the Bibliography

1. Click **Edit & Manage Citation(s)**
2. Click to select the reference to be deleted
3. Click the arrow from the **Edit Reference** icon and select **Remove Citation**

Edit a Reference from the Bibliography

1. Click **Edit & Manage Citation(s)**
2. Click to select the reference to be modified
3. Click **Edit Reference**
 - a. The **Reference Template** from EndNote will open
 - b. Tab through the record to make changes
 - c. Close the Reference Template and click **Yes** to save
 - d. Return to the document, click the arrow from the **Edit Reference** icon, and select **Update from My Library**
 - e. Review the reference and click **Insert→Ok**
 - f. View the change(s) in the Bibliography

Find the bibliographic entry for an in-text citation

1. Hover over or click a reference from the body of the text
2. The first author, year and record number will be displayed in a caption
3. Use Ctrl-Click to move to that reference in the bibliography

Remove the EndNote formatting from the Document

1. You may remove the EndNote formatting when all of the references have been added. This is often necessary to prepare a manuscript for publication or other submission. Or, you might want to make changes to the references in the document without altering the reference in EndNote.
 - a. This is best done when the entire manuscript is complete.
 - b. You will not be able to insert additional citations to this document
2. Click **Convert Citations and Bibliography →Convert to Plain text**
3. Follow the prompts to save the document
4. To insert additional citations using EndNote, you will use the saved, formatted document.