

## Introduction to EndNote X9

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### Getting Started

**Note to all users:** Prefer Firefox over other browsers.

**Note to Mac users:** Make sure to have installed the most recent updates for Endnote X9 if you have upgraded your operating system to Catalina (the Catalina operating system does not support any previous versions of Endnote). Preferably do not use Safari.

#### 1. Creating a library

- Create a new endnote library for each new project or research topic.
- Under **File** choose **New**.
- **Note to PC users:** Depending on your setup parameters EndNote sometimes creates a file with a **.enl** extension and a folder with a **.Data** extension for your EndNote Library. If this is the case these two files have to be together at all times, do not move one without the other!

#### 2. Import Journal Term Lists - Required step for each NEW library you create.

- Go to **Tools > Open Term Lists > Journals Term List**. Click on the **Lists** tab.
- Highlight **Journals** then click **Import List**. The lists on a PC may be located in
  - C:\Program Files (x86)\Endnote X9\Terms Lists\
- Select *medical* for medical journals or *bioscience* for biology. Click **Open**. Close the **Term List** window.

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### Entering References

#### 1. Manually entering citations (NOTE: Method 2. Direct export is preferred when possible)

- a. Typing information into a reference form: Under **References**, choose **New Reference**
- b. Next to **Reference Type** make a selection from the drop-down menu
- c. At minimum you must enter in these fields to get an accurate citation: author, year, title, journal, volume, issue, pages
- d. Enter authors on separate lines. Format: *Family Name, First Name*
  - Corporate or organizational authors need a comma after: *World Health Organization,*

#### 2. Direct export from databases

Example 1: **Ovid databases (e.g., Ovid MEDLINE)**

- Choose what results to export (selected results/selected range/all results ≤ 1000)
- Choose **Export** above results list
- Next **Export to:** choose **EndNote**
- Under **Fields to Display** choose **Complete Reference**

Example 2: **Google Scholar**

- **One at a time:**
  - Click on **Settings** in the upper left corner (in the menu)
  - Under **Bibliography Manager > Select Show links to import citations into > choose EndNote and Save**
  - Click **Import into EndNote** below a reference and choose **Open**
- **Several at a time:**

- Add the articles you wish to import to your **Google Scholar Library** by clicking on the **star icon** under the each citation
- Go to **“My Library”** in the upper right corner of Google Scholar
- Select the **export icon** in the upper bar, and select **Endnote**

#### Example 3: PubMed

- Select the records you want to save (all records are selected by default)
- For up to 200 records: From **Send to** option (top right of results) choose **Citation manager**
  - Click on **Create File**
    - In **Internet Explorer or Chrome**: save the file (.nbib)
    - If file was saved, import the file into EndNote (**File menu—Import**)
    - In **Firefox**: open with EndNote
- For over 200 records: From the **Send to** option (top right of results) choose **File**
  - Change Format to **MEDLINE**
  - Click on **Create File**
  - In **Firefox**: open with EndNote
  - If file was saved, import file into EndNote (File menu—Import—File) > Select PubMed (NLM) filter (if not visible, click “Other Filters...” to find it)

#### Example 4: EBSCO databases (e.g. CINAHL)

- From the **Share** option (top right of **Search Results** section), choose **Add to folder: Results (1-[total # of results], you must add the search results from each result page to your folder one page at a time)**
  - From the top navigation bar, open **Folder**
  - Select records to export
  - Click **Export** icon on right of page
  - Select **Direct Export in RIS format**

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## Working with a Library

### 1. Creating Groups

- Under **Groups**, choose **Create Group** or **Create Smart Group**
- Groups require manual relocation of records. One record can be in multiple groups.
- Smart Groups use criteria you set to automatically retrieve matching citations within your EndNote library.

### 2. Removing duplicates

- Under **References** choose **Find duplicates**
- To edit specifications for de-duplication, go to **File > Preferences > Duplicates**
- Choose **Keep this record** to eliminate one of the duplicate records
- Be sure not to have duplicate records in your library when using CWYW: If inserted into your document, duplicate records will show up as multiple references in your reference list and citations.

### 3. Automatically find full text:

- Under **Edit**, choose **Preferences**
- Choose the **Find Full Text** option

- Add the following:

OpenURL Path: <http://mcgill.on.worldcat.org/atoztitles/link>  
 If you have a McGill username and password  
 (unnecessary if you have a McGill VPN setup):  
 Authenticate with <http://proxy.library.mcgill.ca/login?url=>

- Click on reference(s) of interest
- Under **References** choose **Find full text** (also right click)
- A search will begin. If the full text is found it will be added to the reference and a small paper clip will appear and PDF full text document will be attached.
- With a McGill Username and password: When the authentication page appears after you click on find full text, type in your McGill email address and password. Click **OK**. You need to authenticate only once per session.
  - An EndNote copyright box will appear every time you attempt to locate full text articles. Click **OK** each time this box appears.

#### 4. Manually attach documents to a reference (PDF, .doc, etc.)

- Under **References** choose **File attachments** then **Attach file...**
- When the file is attached, a small paper clip will appear next to the reference

#### 5. Converting a PDF or a Folder of PDFs into a reference(s)

- Under **File** choose **Import**. Click on **File** or **Folder**
- Click on the **Choose** button and locate the PDF or Folder of PDF's you wish to convert into a reference(s)
- Click **Open**
- In Import Option, select the **PDF option**
- In Duplicates, choose **one** the following options:
  - Import All: All references, including duplicates, are imported.
  - Discard Duplicates: No duplicates are imported.
  - Import into Duplicates Library: Duplicate references are imported into a library called [your library name]Dupl.enl.
- In Text Translation, choose **No Translation**
- The new reference(s) is/are stored in the Imported References group. This group is temporary and will disappear when you exit from the library. The reference will remain in your library.
- How well this works will depend on the quality of the **metadata** stored with the PDF, it **may or may not work**.

#### 6. Saving a compressed Library for transferring or e-mailing

- Choose to compress the entire library, one group or selected set of references
- Under **File** choose **Compressed Library**, then **Create**. You must name this new file.
- **Note:** This unique file will have a **.enlx** file extension rather than the standard **.enl file** and **.Data folder**

#### 7. Creating a quick bibliography

- Select the references of interest
- Under **Edit** choose **Copy formatted**
- Paste the references in a Word document or email message

#### 8. EndNote Library Sharing

- Watch: <https://youtu.be/DMvf3igDhq8>
- You first need to fully sync your library with your EndNote Online account (create one for free).

- Share your entire EndNote library, including references, PDFs, and annotations
- Everyone can add to, annotate, & use the library; there is an Activity Feed that you can monitor

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## Using Cite While You Write (CWYW) with a word processor, e.g., Microsoft Word

1. Inserting in-text citations
  - Place your cursor where you wish to insert your citation(s) in your Word document.
  - In the Endnote Library highlight the reference(s) you wish to cite.
  - Switch back to your Word document and, using the EndNote toolbar, select the arrow on the **Insert Citation** button > Choose **Insert Selected Citation(s)** from the menu.
2. Changing the citation style (e.g., from Vancouver to APA 6<sup>th</sup> or vice-versa): If style not visible, choose “Select another style...”
3. Editing citations: excluding authors, adding page numbers, etc.
4. Converting citations to plain text for final submission
  - Select Tools > Endnote > Convert to Plain Text from the Word menu.
  - Note: Word 2007-onwards for Windows has a separate EndNote tab in its menu. Select **Convert Citations and Bibliography > Convert to Plain Text**.

### More information about output styles, import filters, and connection files

What is a filter?

- A filter is a file that acts as an interface that allows EndNote to interpret the parts of references that have been saved in a file (i.e., downloaded from an online catalogue or database). The filter allows EndNote to import the file.

What is a connection file?

- Connection files allow you to search and import references from online databases and catalogues, using EndNote itself as a search interface. EndNote connection files are available for library catalogues and a limited number of online databases.

What is an output style?

- Output style files act as templates that show EndNote how to arrange the information in each of your EndNote references when you’re creating citations and bibliographies. Output styles can be modified and saved.
- Styles include discipline-specific citation styles such as APA (social sciences), MLA (humanities), and CSE (biological sciences), or styles established for specific journals (*Journal of Politics*, *The Lancet*, etc.)

When you download EndNote on your own computer, a selected set of common output styles, connection files, and filters is included. However, these do not correspond directly to the connection files and filters for databases to which we have access at McGill, nor is every style included.

If you don't see the style, filter, or connection file that you need, you can check the EndNote website for additional files: <http://endnote.com/downloads/styles>