

# Introduction to Endnote X9

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# OBJECTIVES

At the end of this workshop you should:

- Be able to create an EndNote library
- Be able to enter, import and manage records
- Be able to search your library & generate a list of references
- Be able to use the Cite-While-You-Write (CWYW) in Word to generate in text citations and a bibliography.

# Endnote X9

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- 1 Basic Information and Setup
- 2 Getting Records into my Endnote Library
- 3 Full Text with Endnote
- 4 Tips for Using Endnote
- 5 What to do with records once they are in Endnote?
- 6 Going Further
- 7 Reminder & References

# 1. Basic Information and Setup

# What is Endnote?

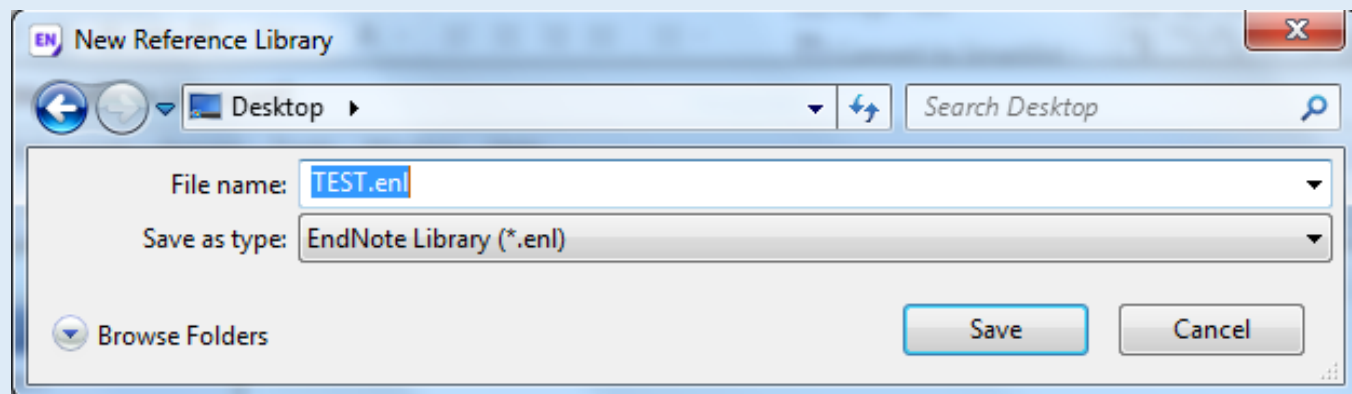
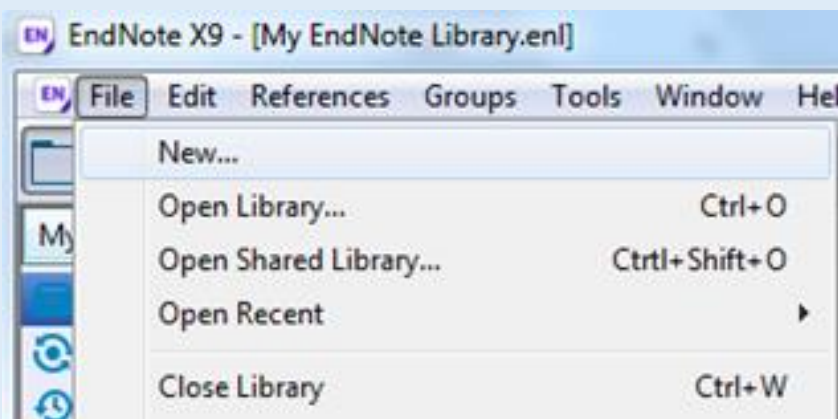
EndNote is one example of bibliographic or citation management software. It allows you to:

- Create a searchable customized database or “library”
- Keep track of the articles you are reading
- Keep track of other formats i.e. books, figures/tables, dissertations, letters etc.
- Import citations directly from databases or e-journals
- Connect full text to your records
- Easily generate in text citations and a bibliography using the Cite While You Write (CWYW) feature.

# Download Endnote

- If you are affiliated with McGill:
- <http://kb.mcgill.ca/it/endnote>
- If you are affiliated with another university download Endnote from their pages.
- TIPS:
  - Install Endnote on the computer you plan on doing most of your research on.
  - Create an Endnote Web account to use while you are doing research at a computer other than the one where you installed Endnote desktop and sync your Endnote library with your Endnote Web account when you are back on your main computer.

# Create a new library




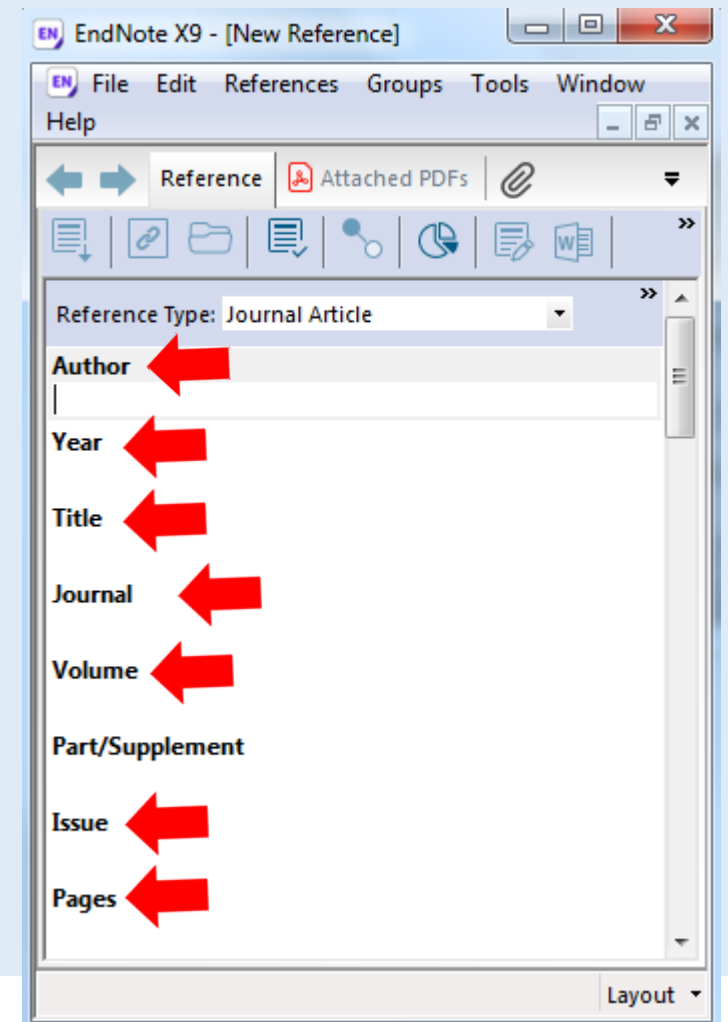
- File > New > Give your Library a Name > Save
- Create a new library for each new research project
- TIP: Save your Endnote library for a given project, in project a folder with all other documents that are relevant to that project ( Word documents, Excel files, PDF's...)

## 2. Getting Records into my Endnote Library



# Create a record manually

- Reference > New reference, or use icon 
- New window pops open
- Select your reference type
- Default reference type = Journal Article
- Fill in fields. Minimum needed: author, year, title, journal, volume, issue, pages
- Can access full text from record (see slides no.)



# Import citations - General

- Creating a record manually rarely necessary.
- You can import citations directly from most databases and most electronic journals.
- If you have a printed article, you can search for the article online and import the reference.
- The following slide will demonstrate how to do this a few different ways.
- Most databases and journals will work in one of these ways.

# Import citations – Browser Tips



- For the most seamless exporting Mozilla Firefox is recommended.
- Firefox has an Export Helper that will automatically open.
- I will be demonstrating with Google Chrome as this is what most people use regularly. However, this adds a few steps to importing citations into your endnote library.
- You can also use Safari, which also works slightly differently.

# Import citations from PubMed

- Run your search.
- If you have less than 200 references to import:
- Select your citations
- Click “Send to”
- Select Citation manager
- Click “Create File”

NCBI Resources How To

PubMed.gov  
US National Library of Medicine  
National Institutes of Health

PubMed breast cancer Search

Create RSS Create alert Advanced Help

Article types  
Clinical Trial  
Review  
Customize ...

Text availability  
Abstract  
Free full text  
Full text

Publication dates  
5 years  
10 years  
Custom range...

Species  
Humans  
Other Animals

Clear all

Show additional filters

Format: Summary Sort by: Best Match Per page: 20 Filters: Manage Filters

Search results  
Items: 1 to 20 of 387886 Selected: 2

Send to

Choose Destination

☐ File ☐ Clipboard  
☐ Collections ☐ E-mail  
☐ Order ☐ My Bibliography  
☒ Citation manager

Generate a file for use with external citation management software.  
Download 2 citations.  
Create File

1. [Breast cancer in young women: a](#)  
Anastasiadi Z, Lianos GD, Ignatiadis G. Updates Surg. 2017 Sep;69(3):313-317. doi: 10.1016/j.ru.2017.06.003. Epub 2017 Mar 4. Review. PMID: 28260181 [Similar articles](#)

2. [Breast cancer in the 21st century: from early detection to new therapies.](#)  
Merino Bonilla JA, Torres Tabanera M, Ros Mendoza LH. Radiologia. 2017 Sep - Oct;59(5):368-379. doi: 10.1016/j.rx.2017.06.003. Epub 2017 Jul 14. Review. English, Spanish. PMID: 28712528 [Free Article](#) [Similar articles](#)

Find related data  
Database: Select Find items

# Import citations from PubMed

- If you want to import up to 200 at the same time,
- You can skip the step of selecting the references you want and directly go to “Send to” and select the number you want

Format: Summary ▾ Sort by: Best Match ▾ Per page: 20 ▾ Filters: [Manage Filter](#)

**Search results**  
Items: 1 to 20 of 387886

<< First < Prev F

☐ [Breast cancer in young women: a](#)  
1. Anastasiadi Z, Lianos GD, Ignatiadc  
Updates Surg. 2017 Sep;69(3):313-317. c  
Epub 2017 Mar 4. Review.  
PMID: 28260181  
[Similar articles](#)

☐ [Breast cancer in the 21st century: a](#)  
2. [therapies.](#)  
Merino Bonilla JA, Torres Tabanera M, Ros Mendoza LH.  
Radiologia. 2017 Sep - Oct;59(5):368-379. doi: 10.1016/j.rx.2017.06.003. Epub  
2017 Jul 14. Review. English, Spanish.  
PMID: 28712528 **Free Article**  
[Similar articles](#)

Send to ▾ Sort by: **Choose Destination**

☐ File ☐ Clipboard  
☐ Collections ☐ E-mail  
☐ Order ☐ My Bibliography  
☒ Citation manager

Generate a file for use with external citation management software.

Number to send **200 ▾**

Start from citation

Create File

Select

Find items

# Import citations from PubMed

- If you have more than 200 references to import:
- Step 1:
  - Click “Send to”
  - Select “File”
  - Select Format “MEDLINE”
  - “Sort by” does not matter
  - Click “Create File”
  - Save it to your computer

Format: Summary ▾ Sort by: Best Match ▾ Per page: 20 ▾ Filters: [Manage Filter](#)

Search results

Items: 1 to 20 of 5129 << First < Prev

Filters activated: Review, Free full text, [Clear all](#) to show 389282 items.

1. [Awareness and current knowledge](#)  
Akram M, Iqbal M, Daniyal M, Khan  
Biol Res. 2017 Oct 2;50(1):33. doi: 10.118  
PMID: 28969709 **Free PMC Article**  
[Similar articles](#)

2. [Obesity and adverse breast cancer risk and outcome. Mechanistic insights and strategies for intervention.](#)  
Picon-Ruiz M, Morata-Tarifa C, Valle-Goffin JJ, Friedman ER, Slingerland JM.  
CA Cancer J Clin. 2017 Sep;67(5):378-397. doi: 10.3322/caac.21405. Epub 2017 Aug 1. Review.  
PMID: 28763097 **Free PMC Article**  
[Similar articles](#)

Send to ▾

**Choose Destination**

☒ File ☐ Clipboard  
☐ Collections ☐ E-mail  
☐ Order ☐ My Bibliography  
☐ Citation manager

Download 5129 items.

Format  
MEDLINE ▾

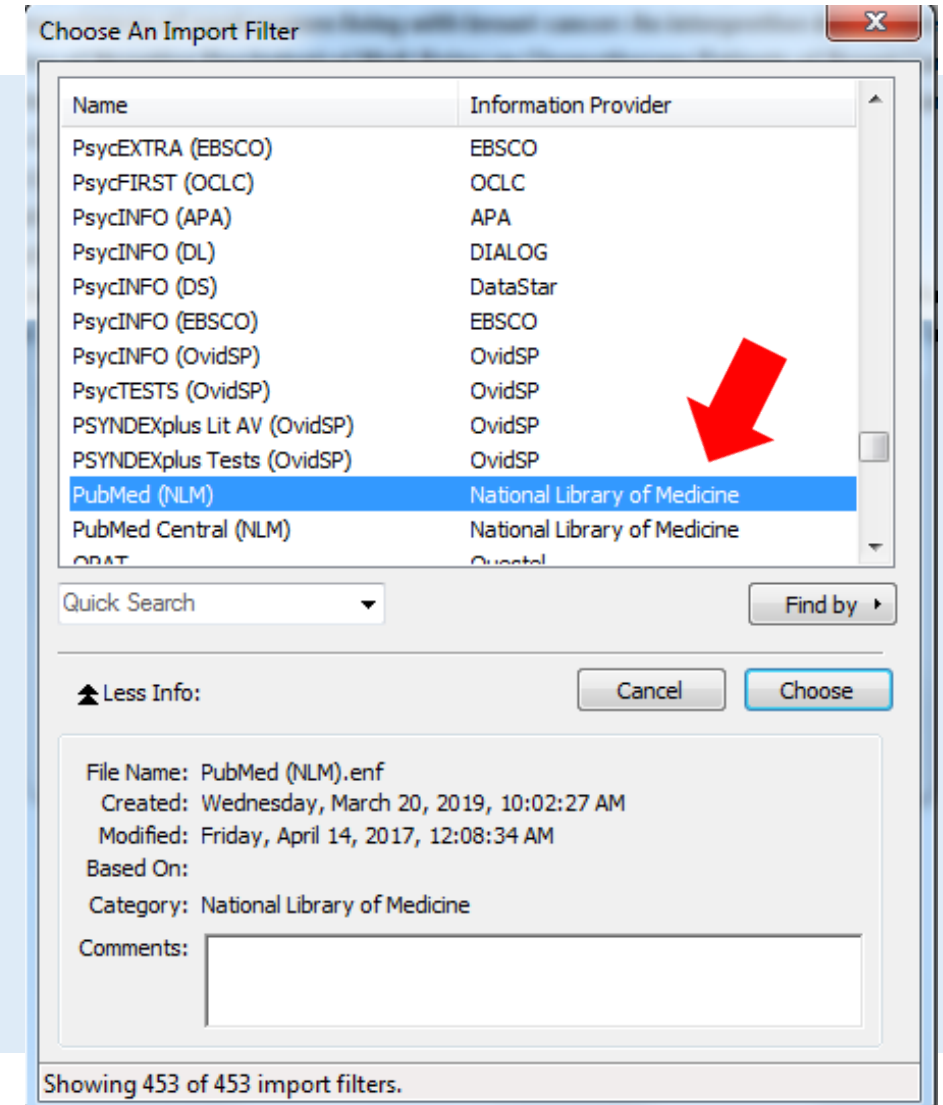
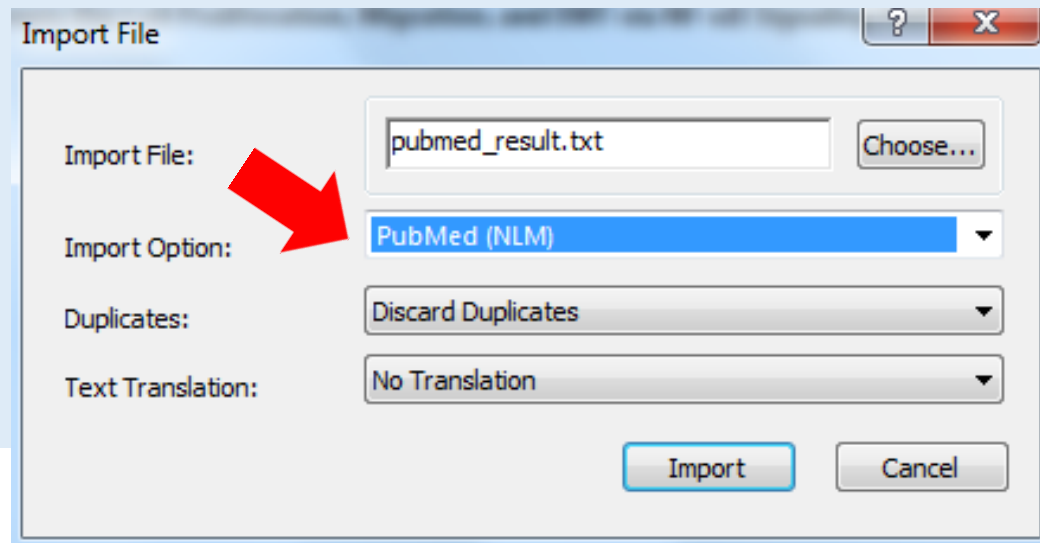
Sort by  
Best Match ▾

Create File

triple negative **breast**  
**breast cancer** review  
metastatic **breast can**  
**breast cancer** risk  
**breast cancer** treatme

# Import citations from PubMed

- Step 2 - In Endnote:
  - File > Import > File > Choose the file you just saved onto your computer from PubMed > Select Import Filter: PubMed (NLM)
  - If PubMed (NLM) is not immediately visible as an import option:
    - go to other filters > find PubMed (NLM) > Choose



# Import citations from OVID Databases


## ➤ Run your search

1. Select articles (or all)
2. Click Export
3. Choose desired options  
Note: I highly recommend selecting “complete reference”
4. Click Export
5. Save file to computer
6. Open file with Endnote X9

The screenshot displays the OVID search results interface. At the top, a toolbar contains icons for Print, Email, and Export (highlighted with a red circle and the number 2). Below the toolbar, a list of search results is shown. The first result is selected, indicated by a checked checkbox (highlighted with a red circle and the number 1). The article title is "Anxiety, depression and emotional profile in renal transplant recipients and healthy subjects: a comparative study." by Pascasio L; Nardone IB; Clarici A; Enzmann G; Grignetti M; Panzetta GO; Vecchiet C. The journal is "Transplantation Proceedings. 42(9):3586-90, 2010 Nov." The UI number is 21094820. The authors' full names are listed below. At the bottom of the article entry, there are links for Abstract, My Projects, and Annotate. On the right side, an "Export Citation(s)" dialog box is open. It shows "Selected: 1-2" and "Total: 2". Under "Format", "EndNote" is selected (highlighted with a red circle and the number 3). Under "Fields", "Complete Reference" is selected (highlighted with a red circle and the number 3). Under "Include", both "Link to External Resolver" and "URL" are checked. At the bottom of the dialog, there are "Cancel" and "Export" buttons, with the "Export" button highlighted by a red circle and the number 4. A red curved arrow points from the top right of the main interface towards the export dialog.




# Import citations from EBSCO Databases

Sign In  Folder Preferences Languages ▾ Ask a JGH Librarian Help

2.

Search Results: 1 - 50 of 61,041

Relevance ▾ Page Options  Share ▾

## 1. Anxiety as Predictor of Negative Psychological Well-Being on Chemotherapy Patients of Breast Cancer.



Academic Journal

(includes abstract) Nurwahyuni, Eka; Poeranto, Sri; Supriati, Lilik; International Journal of Nursing Education, Jul-Sep2019; 11(3): 63-68. (6p) (Article) ISSN: 0974-9349 AN: 137636472  
Abstract: **Breast cancer** is the second highest cause of death in women after cervical **cancer**. The most commonly used therapy for **breast cancer** is chemotherapy. Chemotherapy has side effects on physical and psychological that may affect the psychological well-being of patient. Anxiety is psychological side effect that is most felt by chemotherapy patients. This study aimed to understand correlation between anxiety and psychological well-being of chemotherapy patients of **breast cancer**. This study used observational analytic method with cross sectional approach. Population in this research was chemotherapy patients of **breast cancer** in 2-6 session in Army Hospital Lv.II of dr.Soepraoen Malang. Total sample in this study was 62 people that taken by using stratified random sampling technique based on chemotherapy session of patients. Data collection was conducted by using questionnaires. Data were analyzed by using univariate and bivariate analysis. The bivariate analysis result by using lambda correlation test shown that there was negative correlation between anxiety and psychological well-being with a value of  $p=0.050$  and  $r=-0.200$ . The conclusion of this study stated that the higher the anxiety, the higher probability of negative psychological well-being.

**Subjects:** Breast Neoplasms Drug Therapy; Chemotherapy, **Cancer**; **Cancer** Patients Psychosocial Factors; Psychological Well-Being; Anxiety; Adolescent: 13-18 years; Adult: 19-44 years; Middle Aged: 45-64 years; Aged: 65+ years; Female

 [HTML Full Text](#)  [PDF Full Text](#)

1.



3.

Open EndNote Library > Run your search:

1. Add selected articles to your folder (or Click "Share" and add up to 50 at once)
2. Open folder (bar on the top of webpage)
3. Select articles
4. Click Export > Save file to computer > Open file with Endnote X9

## Articles

1-1 of 1

Page: 1

Date Added ▾ Page Options ▾



Select / deselect all

Delete Items



1. Anxiety as Predictor of Negative Psychological Well-Being on Chemotherapy Patients of Breast Cancer.

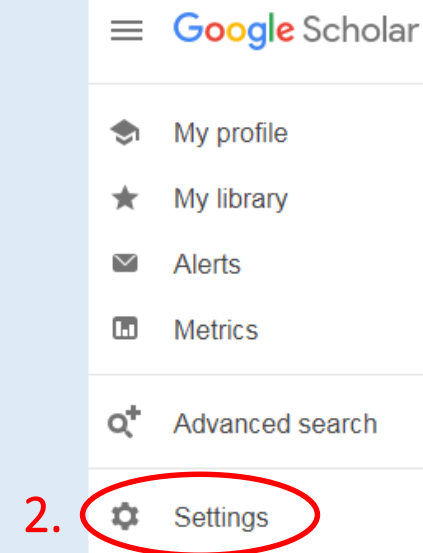
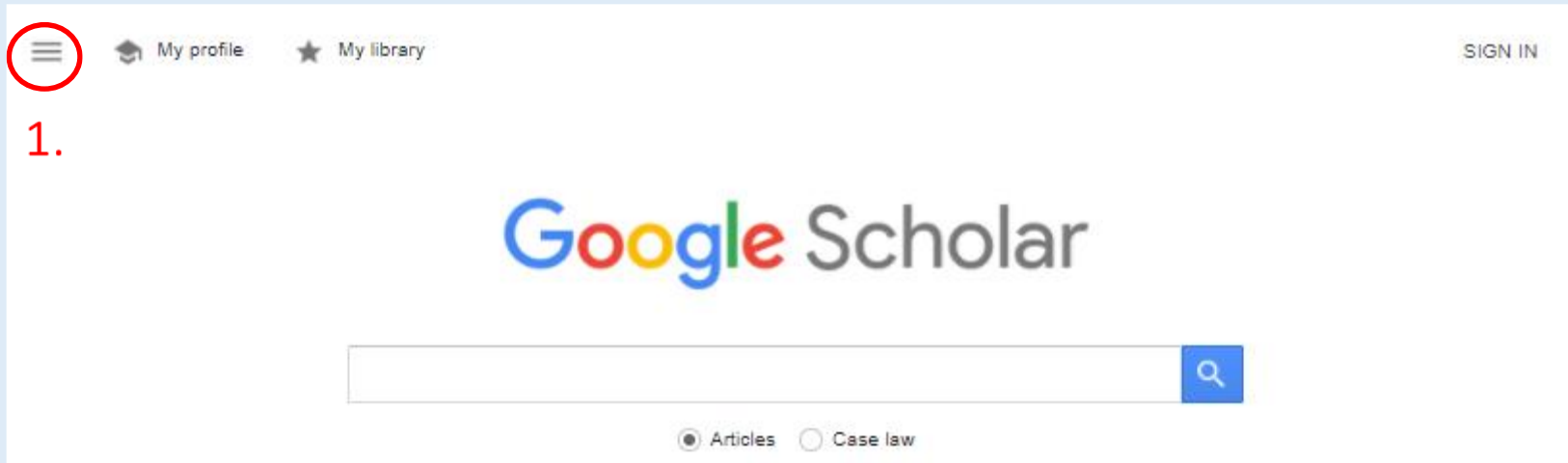
 Print

 E-mail

 Save as File

 Export

# Import citations from Google Scholar



- Option 1 – Step 1 - One at a time:
- On homepage, set your settings to show links to import citations into EndNote
- Return to search

## Bibliography manager

- ☐ Don't show any citation import links.
- ☒ Show links to import citations into

BibTeX  
EndNote  
RefMan  
RefWorks

3.

Save


Cancel

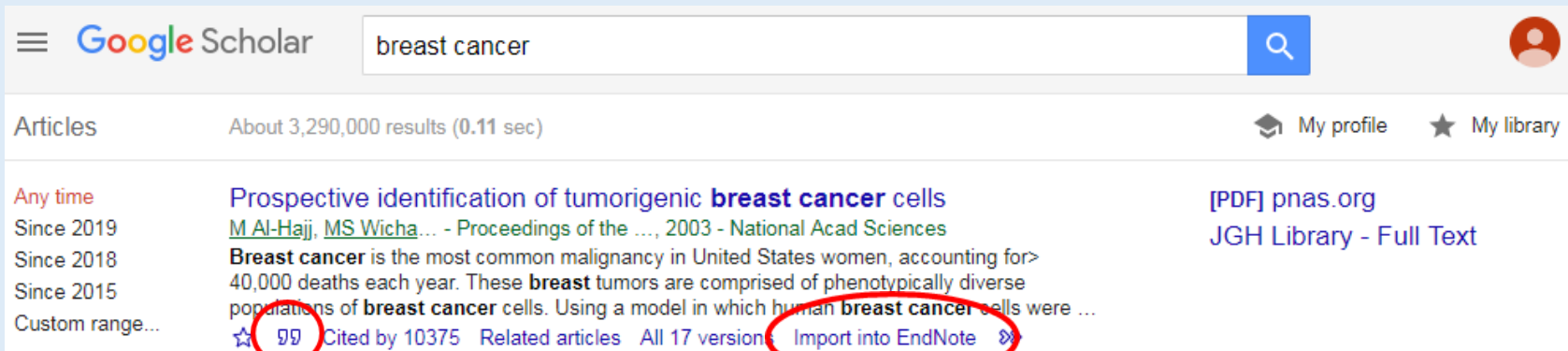
# Import citations from Google Scholar

## ➤ Option 1 - Step 2 - One at a time:

- Open your EndNote Library
- 1. In Google scholar, click on “Import into EndNote”
- Save the file on your computer (by default into downloads)
- Go to the file on your computer and open it with Endnote X9

## ➤ Option 2 - One at a time:

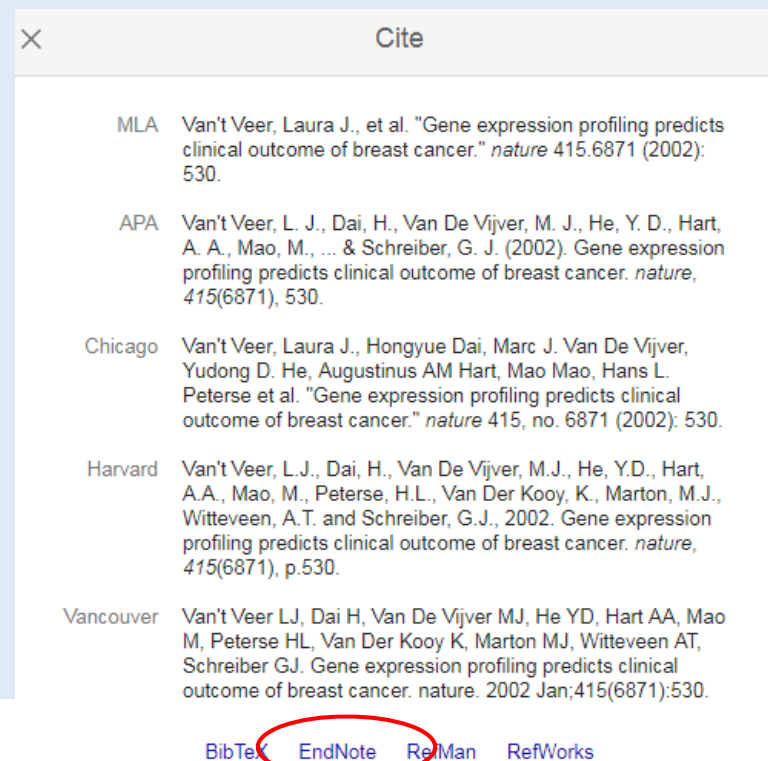
- 2.1. Click on the “quotation marks” Icon 
- 2.2. Choose Endnote



The screenshot shows the Google Scholar interface with the search term 'breast cancer'. The results list includes a top entry titled 'Prospective identification of tumorigenic breast cancer cells' by M Al-Hajj and MS Wicha. Below the title, there is a red circle around the 'Import into EndNote' link. To the left of this link, there is another red circle around the 'quotation marks' icon (two double quotes).

2.1.

1.




The screenshot shows the 'Cite' dialog box in EndNote. It lists various citation styles: MLA, APA, Chicago, Harvard, and Vancouver. The 'EndNote' style is highlighted with a red circle. Below the list of styles, there are links for 'BibTeX', 'EndNote', 'RefMan', and 'RefWorks'. The 'EndNote' link is also circled in red.

2.2.

# Import citations from Google Scholar

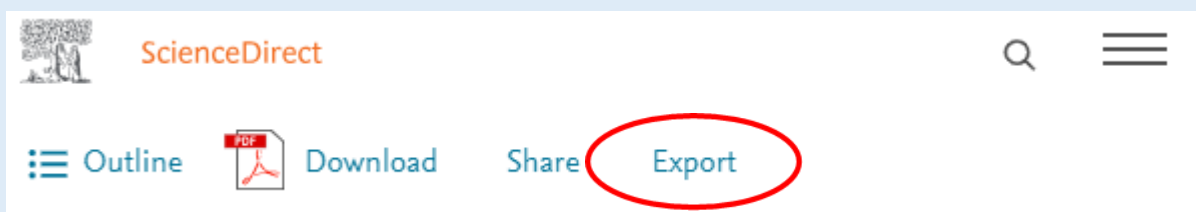
The first screenshot shows the Google Scholar search results for "breast cancer". A red circle labeled "1." highlights the star icon in the bottom left of the first search result. A red circle labeled "2." highlights the "My library" link in the top right navigation bar.

The second screenshot shows the "My library" page. A red circle labeled "3." highlights the "Select All" checkbox. A red circle labeled "4." highlights the "Export" icon (a download arrow). A red circle labeled "5." highlights the "EndNote" option in the export dropdown menu.

- More than one at a time:
- Open your EndNote Library
  1. In Google scholar, add the articles you want in Endnote, into your “Google Scholar Library” by clicking on the star icon ☆
  2. Go to “My Library” in Google Scholar
  3. Select All
  4. Click on the “Export” Icon 
  5. Export the articles to Endnote

# Import citations from Journal Websites

- On the journal website, find the “Export / Download Citation / Cite Feature” on the page of the article you wish to import > Click on it > export the citation in RIS or Endnote format



Letter | Published: 07 February 2018

## Asparagine bioavailability governs metastasis in a model of breast cancer

Simon R. V. Knott, Elvin Wagenblast, Showkhin Khan, Sun Y. Kim, Mar Soto, Michel Wagner, Marc-Olivier Turgeon, Lisa Fish, Nicolas Erard, Annika L. Gable, Ashley R. Maceli, Steffen Dickopf, Evangelia K. Papachristou, Clive S. D'Santos, Lisa A. Carey, John E. Wilkinson, J. Chuck Harrell, Charles M. Perou, Hani Goodarzi, George Poulgiannis & Gregory J. Hannon ✉

*Nature* **554**, 378–381 (15 February 2018) | [Download Citation ↓](#)



The NEW ENGLAND  
JOURNAL of MEDICINE

## 4th ESO–ESMO International Consensus Guidelines for Advanced Breast Cancer (ABC 4)<sup>†</sup> FREE

F Cardoso ✉, E Senkus, A Costa, E Papadopoulos, M Aapro, F André, N Harbeck, B Aguilar Lopez, C H Barrios, J Bergh ... Show more

*Annals of Oncology*, Volume 29, Issue 8, August 2018, Pages 1634–1657,  
<https://doi.org/10.1093/annonc/mdy192>

Published: 19 July 2018

[PDF](#) [Split View](#) [Cite](#) [Permissions](#) [Share ▼](#)



... MORE

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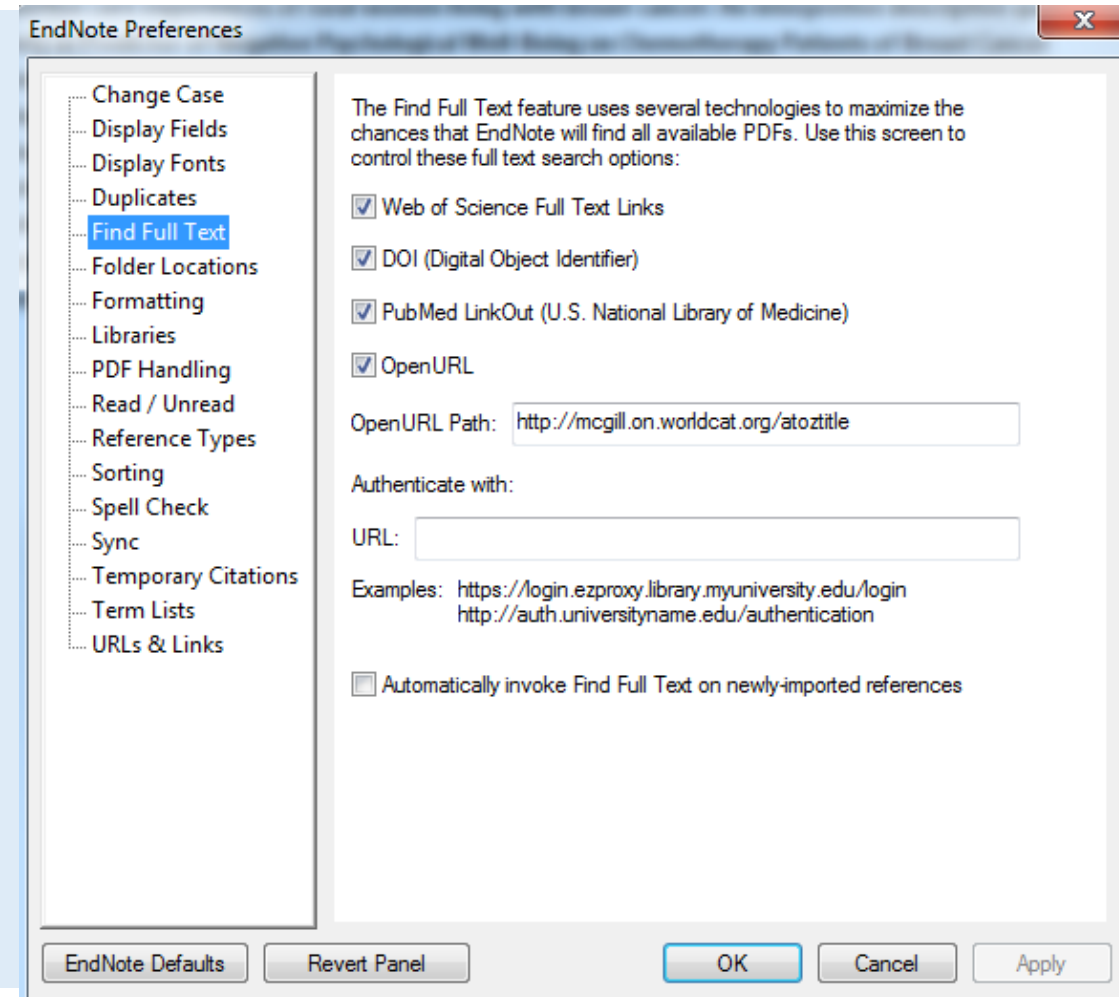
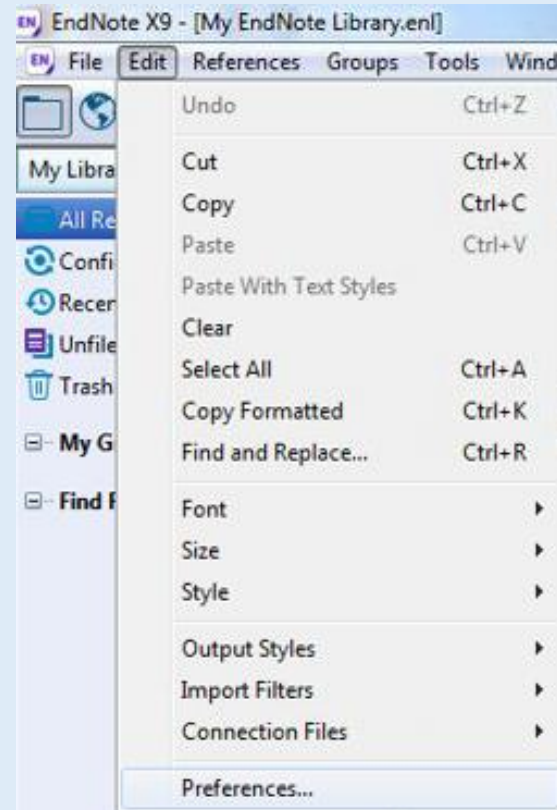
[Download Slides](#)

### 3. Full Text with EndNote



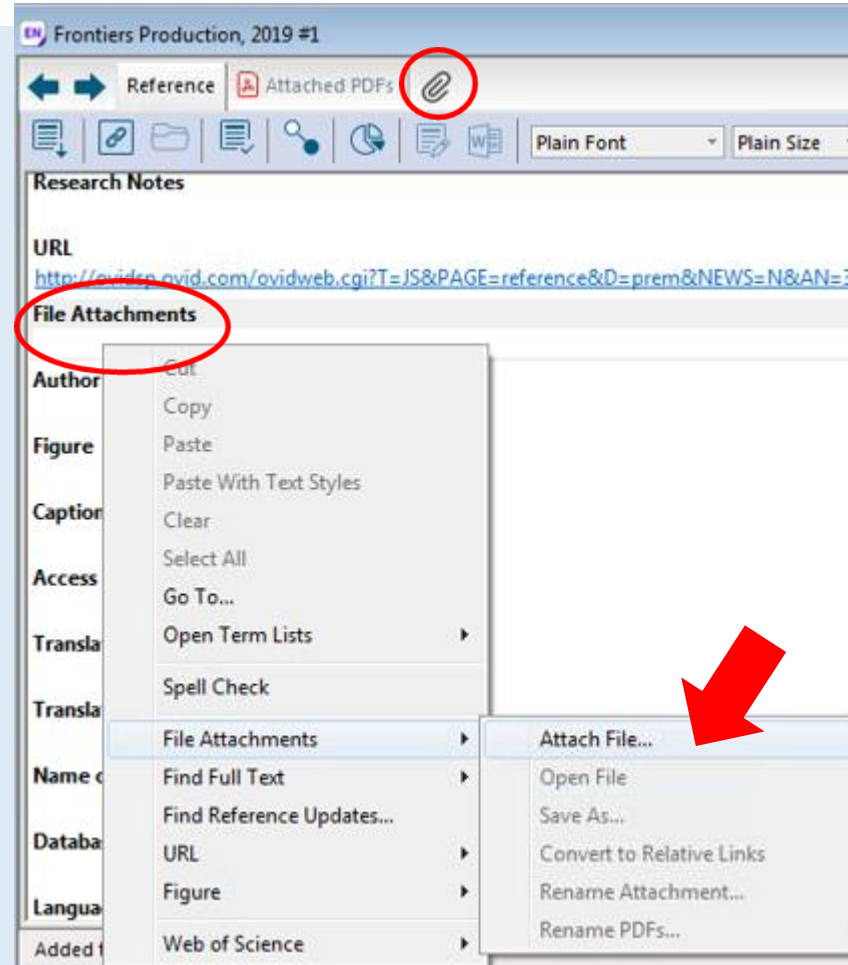
# Enable OpenURL

- OpenURL allows you to access the full text of an online article directly from your EndNote record
- Enable it by going to Edit > Preferences > Find Full Text and typing the following path: <http://mcgill.on.worldcat.org/atoztitles/link>
- Use Open URL directly from a record in EndNote by scrolling down to the URL field
- Right click > URL > OpenURL Link



# Attach a pdf file

- You can also attach a PDF of the article to the record
  1. Open a record
  2. Scroll down to the File Attachments field
  3. Right click > File Attachments > Attach File... (you need to have already saved this PDF on your computer)
- Or, click on the paperclip icon to attach your pdf

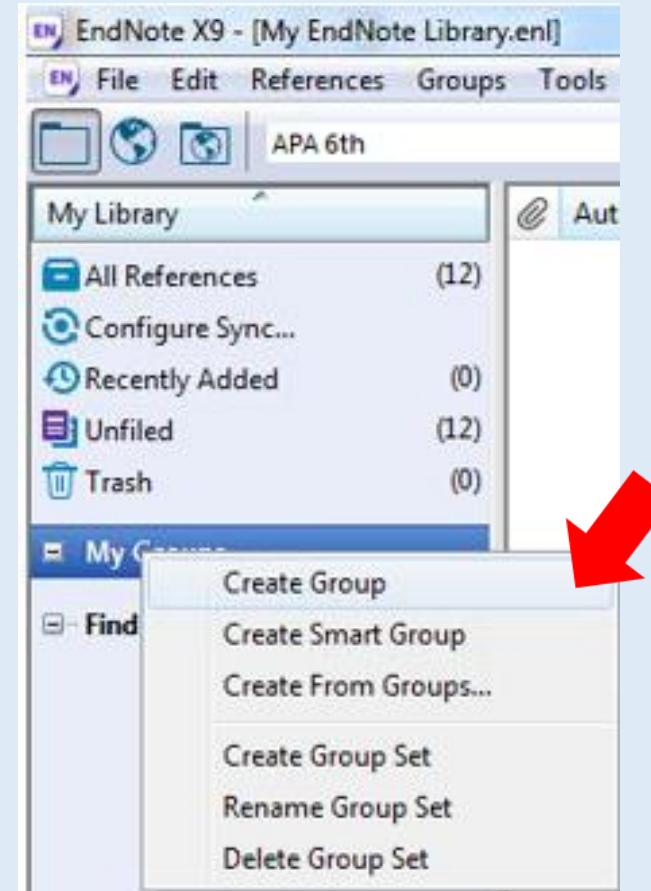




## 4. Tips for Using Endnote

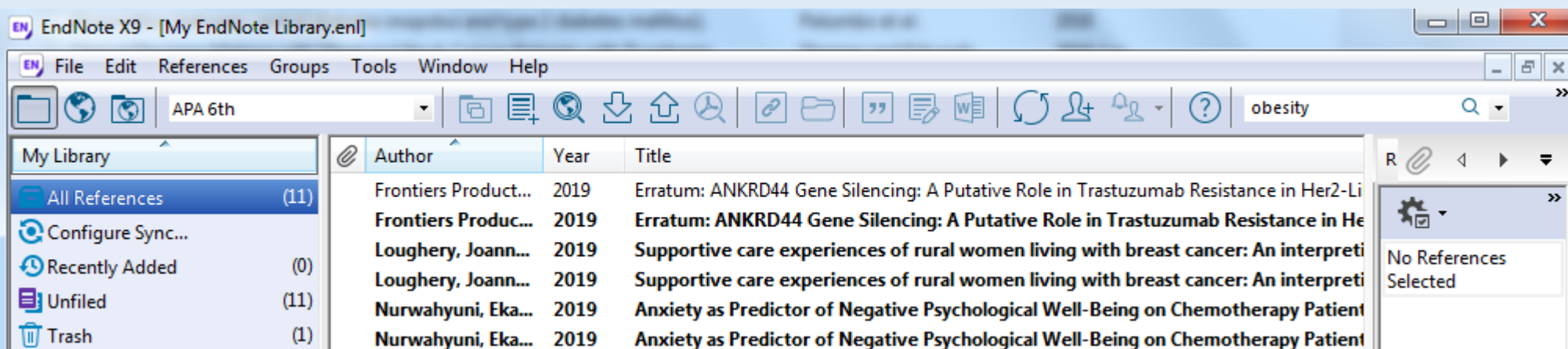
# Create groups

- Use groups to create subsets for your library
- My Groups > Right Click > Create Group
- Smart Groups update automatically by adding new records that fit similar criteria without you having to add references manually
- TIP: Exercise caution with the Smart Groups feature

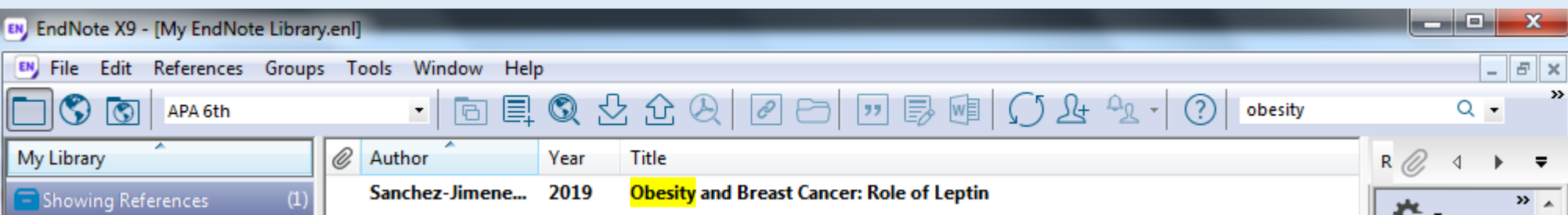


# Search your citations

- Type your keyword
- Click “search”

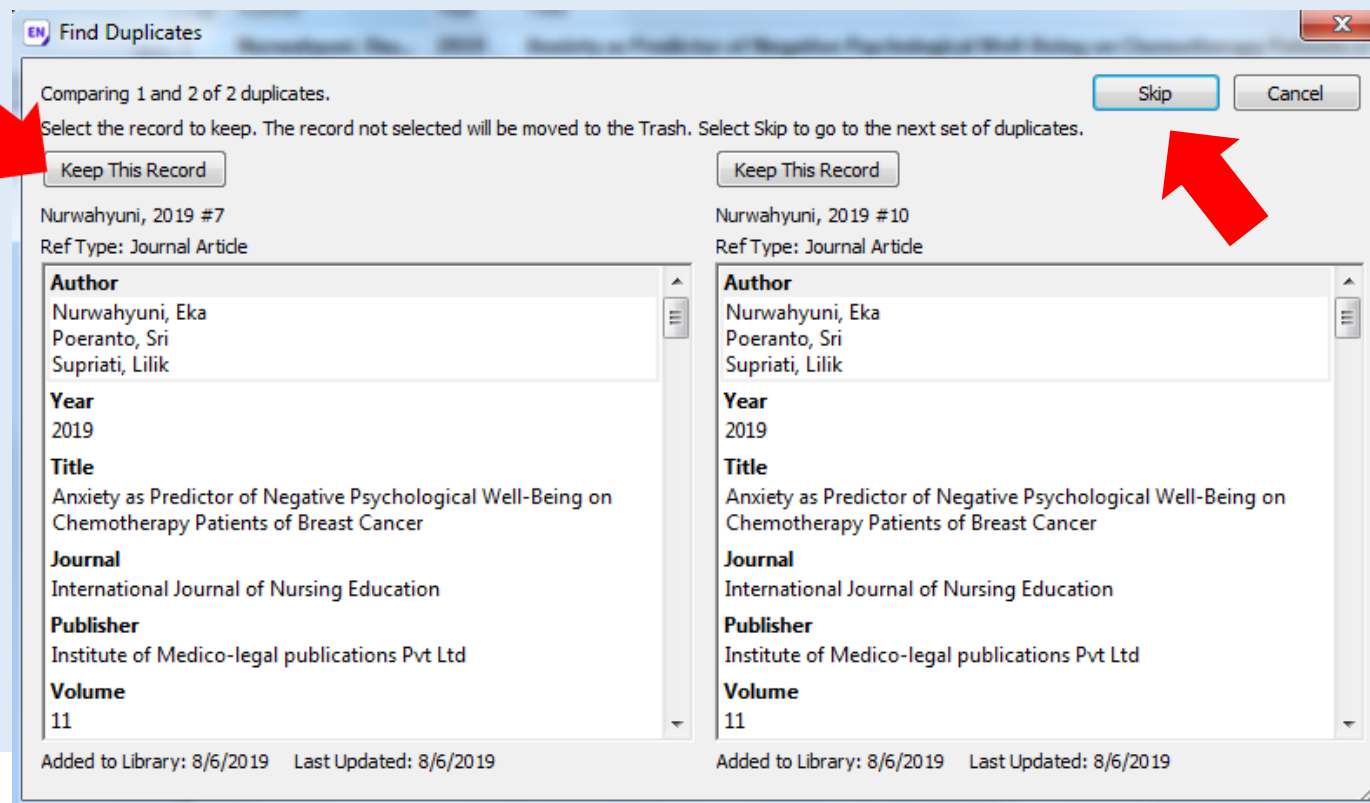
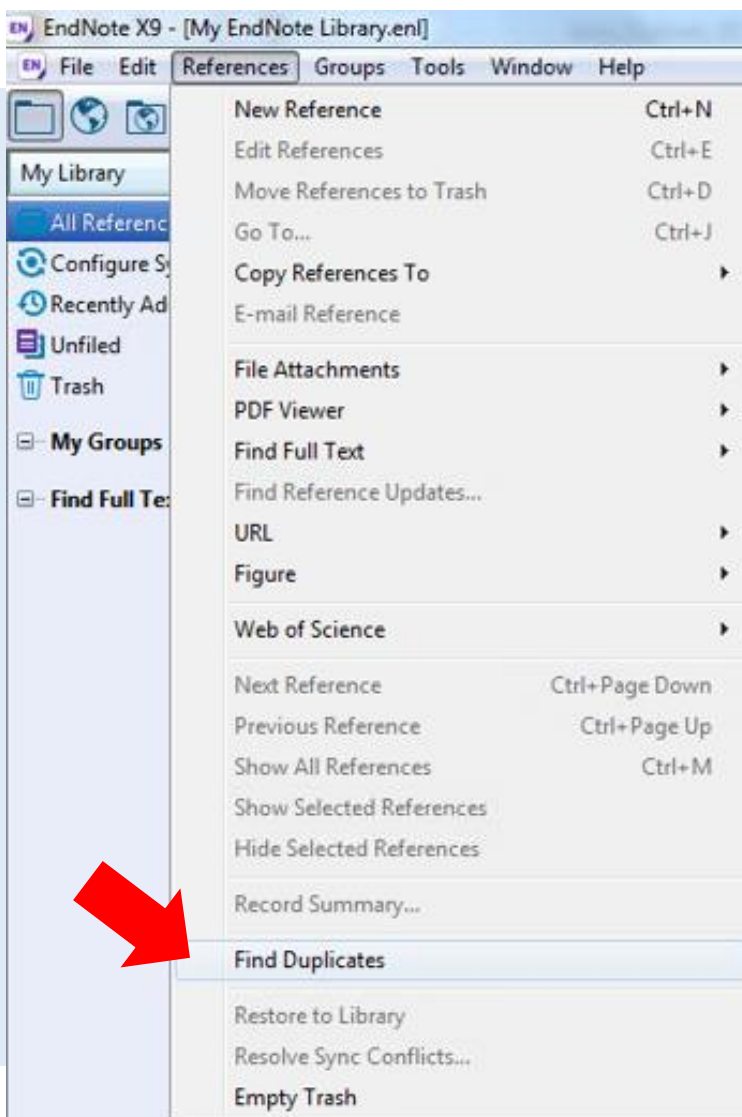


(...)



# Delete duplicates

- References > Find Duplicates > Select which record to keep / Or Skip if it is not a duplicate



# Delete duplicates

- To set your duplicates preferences:
  - Edit > Preferences > Duplicates
  - Note: The more fields you include in the matching criteria, the less likely the program will actually find duplicates- it is best to use title only

5. What to do with records  
once they are in Endnote?


# Choose your output style

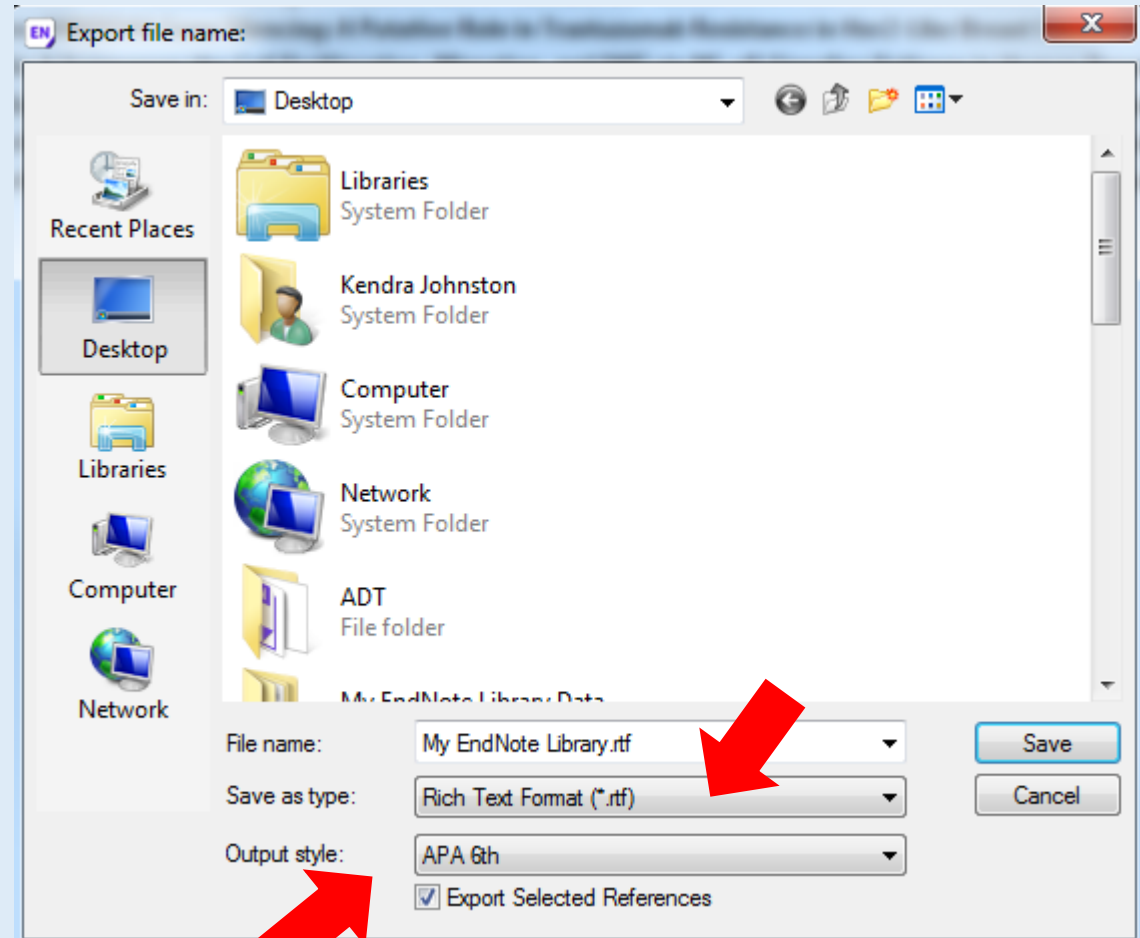
- Click on the arrow to select another output style.
- Which one you choose depends on which citation style you need to use for your document.
- For example: depending on indications for the journal you are submitting to - see the journal's guidelines for authors).



# Export your references

To Create a bibliography:

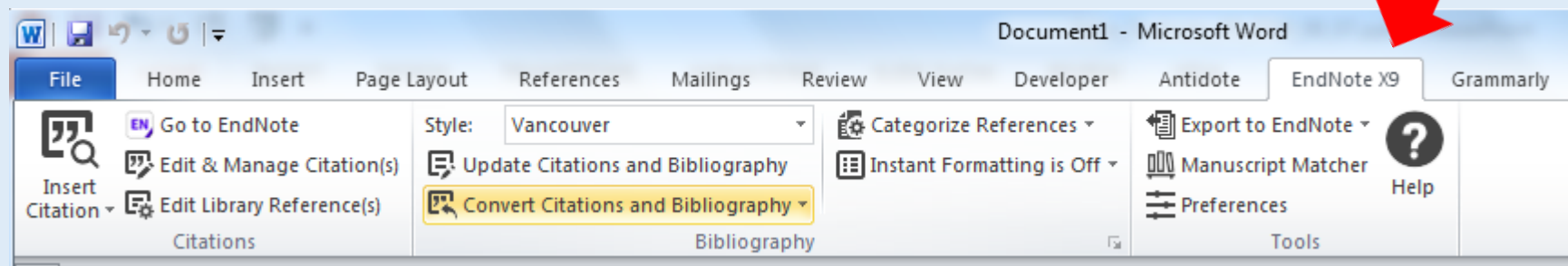
- Select references
- File > Export or click on icon 
- Select file name and output style
- Save as .rtf file to open it in a word processor software





# Cite-While-You-Write (CWYW)

- CWYW stands for Cite While You Write
- Use this feature to insert citations as you write your paper and to generate a bibliography when you are done.
- You must have Word installed on your desktop for this feature to work- CITRIX interferes with EndNote's ability to communicate with Word.
- CSIT can install Word on your desktop for approx. \$70.
- One-on-one tutorials are available.



## 6. Reminder & References

# REMINDER

- A JGH Librarian is available to provide one-on-one instruction and help  
Kendra Johnston, 514 340 8222 x22453  
[kendra.johnston.ccomtl@ssss.gouv.qc.ca](mailto:kendra.johnston.ccomtl@ssss.gouv.qc.ca)
- To access this presentation:  
<https://www.jgh.ca/care-services/health-sciences-library/instruction/workshop-presentations-handouts/>

# REFERENCES

1. Frati, F., Touchette, J., Kleinberg, J. (2015), EndNote X6 Basics , Presented at JGH

# THANK YOU

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