Introduction to Endnote X9

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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.
1. Basic Information and Setup
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](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...)

![EndNote X9 - My EndNote Library.enl](image)

![New Reference Library](image)
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.)
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.
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.
Run your search.
If you have less than 200 references to import:
Select your citations
Click “Send to”
Select Citation manager
Click “Create File”
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.
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
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

![Image of OVID database interface showing export process]

- Export Citation(s)
  - Format: EndNote
  - Fields: Complete Reference
  - Include:
    - Link to External Resolver
    - URL

Click Export to save the file to your computer.
Import citations from EBSCO Databases

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
Import citations from Google Scholar

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

2. **Settings**

3. **Bibliography manager**
   - Don't show any citation import links.
   - Show links to import citations into EndNote
   - Save or Cancel
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
Import citations from Google Scholar

More than one at a time:

1. Open your EndNote Library
2. In Google scholar, add the articles you want in Endnote, into your “Google Scholar Library” by clicking on the star icon ⭐
3. Go to “My Library” in Google Scholar
4. Select All
5. Click on the “Export” Icon
6. 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.
3. Full Text with EndNote
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.
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).
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
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

To access this presentation:
https://www.jgh.ca/care-services/health-sciences-library/instruction/workshop-presentations-handouts/
1. Frati, F., Touchette, J., Kleinberg, J. (2015), EndNote X6 Basics, Presented at JGH
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