Workshop Agenda

- Understand EndNote's functions and capabilities
- Find out how to download the program and how to create a library
- Add references to your library
- Create groups to organize your references
- Find full text articles
- Start a bibliography using EndNote and Microsoft Word

A few notes about the library website & how to get full text articles

- Visit the library website at: **https://library.buffalo.edu/hsl**. Check out our biomedical databases, print and electronic journals, and books.
- You have access to more full text if you begin at the library website. If you are off campus, log in with your UBITName and password.
- Once you are logged in, look for the Article Linker to get full text:
- Request articles and other library materials (from UB and other libraries) at: **https://library.buffalo.edu/delivery**. Book chapters and articles will be delivered electronically. This is a free service for UB faculty, staff, and students.

Need Help? Contact your subject librarian!

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829-5735

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Q: What's EndNote?

A: It is a reference management program. Use it to:

- Build your own personal database of references called an EndNote Library.
- Organize references by topic or project.
- Store full text PDF articles with each reference.
- Annotate and highlight articles within EndNote.
- Create formatted bibliographies and citations in Microsoft Word documents with a wide variety of citation styles as you "Cite While You Write."

Downloading EndNote

Go to **https://library.buffalo.edu/endnote** and choose the correct version for your operating system.

NOTE: If you are running Catalina on your Mac, you will need to upgrade to EndNote X9.3 as previous versions are no longer compatible. Any previously existing libraries will have to be converted before use; to do so, follow the prompts from EndNote upon opening the individual library in EndNote.

Creating a new library

Open the program, choose file and then new. Name your library, choose the location to store your library, and click save.

Advice on where to store your library from the EndNote people: Never store an EndNote working library (the .enl file and .data folder) on any cloud service for sharing, or even just for your own use. This will eventually lead to library corruption because of the way the cloud services synchronize files over the Internet. Similarly, never store a working library on a flash drive, for much the same reasons.

Layout

Select the reference panel that appears on the right-hand side of the screen to change the layout and display of Endnote. The default layout is to display on the right side, split.
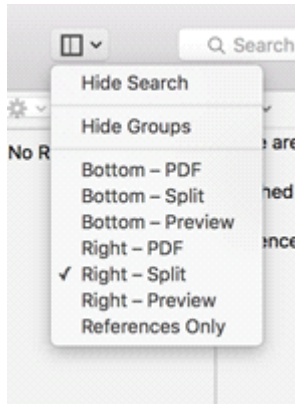
Menu and Icons

Many of the menu options have a corresponding icon.

Modes

There are three display modes to choose from in EndNote. Local library is the default option.

 Local Library - Permanent library stored on your computer.

 Online Search - Search for references from within EndNote. Copy the references you want to save into your local library. The online search mode stores items temporarily.

 Integrated - Both modes combined. Online search results will automatically be added to your local library.

Adding References – Manual Entry

References → New Reference

- There are many different reference types. The default reference type is **journal article**.
- Enter author/editor names ONE NAME per LINE. Type **LAST NAME (comma), FIRST NAME.** To enter initials instead of full names, type a period or space between initials (e.g. **S.L.** Johnson or **S L** Johnson).
- Corporate authors: put a comma *after* the company name. Do not put commas in the name of a company or all the text after a comma will be interpreted as a first name. (**eg. Centers for Disease Control,**)
- When you close a record, be sure to save it. You can choose to set save new references as a default.

Example citation:

Murdoch TB Detsky AS. The inevitable application of big data to health care. JAMA. 309(13):1351-2, 2013 Apr 3.

Adding References – Export from a Database

Note: **Firefox** and **Chrome** users, you may have to choose to open the file with EndNote if you haven't used the program before. **Safari** users: the file will go to your downloads. When opening an EndNote file for the first time, it will most likely be necessary to open your downloads folder, right click the file and select "open file with" and select EndNote. **ALL MAC USERS**: If you have any issues exporting the file into EndNote, you may have to adjust your security settings to allow your computer to open up the file type.

Very important note: leave the EndNote window open in the background. Minimizing or closing the program can interfere with citations being correctly imported into EndNote.

MEDLINE (OVID) https://research.lib.buffalo.edu/MEDLINE-ovid

After searching, select your references individually by the checkbox, or use select range (at this time you are limited to exporting 1,000 citations at a time).
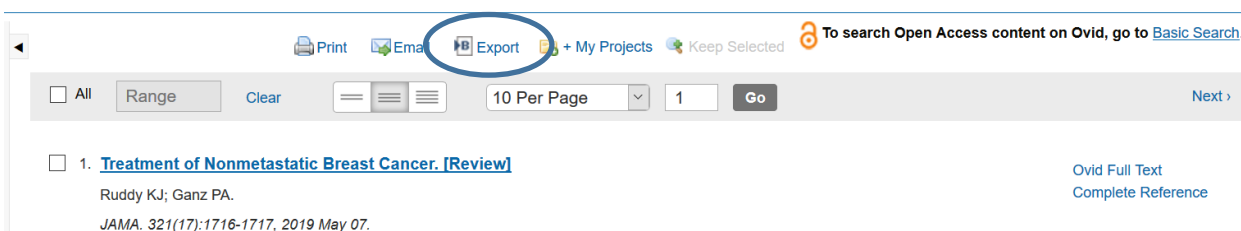

1. Make selections and click **Export.**

2. Under Format, choose **EndNote.**

3. Under Fields, select **Complete Reference**.

4. Click **Export**. If EndNote is closed, this action will usually launch EndNote.
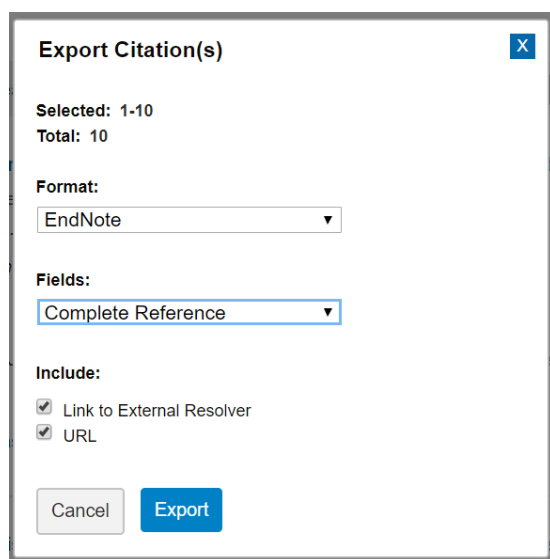
NOTE:

After the references download on your browser, when you select the download file it is common to have to choose an application. Select "Choose Application…" and open Endnote. It may ask you to select an application after each export, so it is useful to download more than one reference at a time.
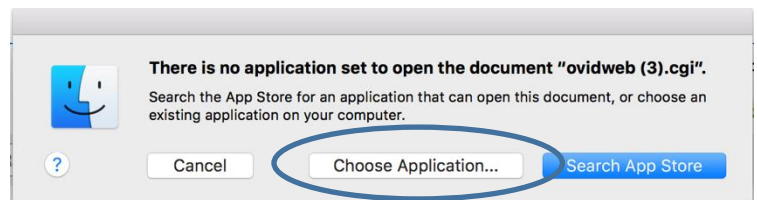
PubMed https://research.lib.buffalo.edu/pub-med

1. Make selections to send certain citations.
2. Click **Send to** and pick **Citation manager**.
3. From the drop down menu, **Send all results on this page**, **All results**, or a **Selection**.
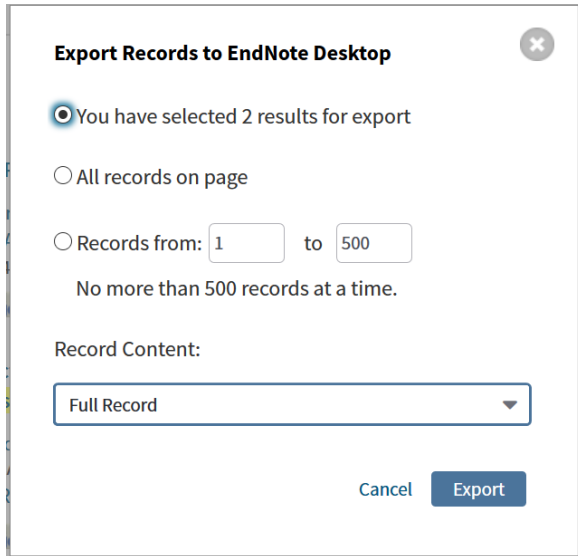4. Click **Create File**. Make sure to open the file with EndNote.

Web of Science https://research.lib.buffalo.edu/web-of-science-core-collection
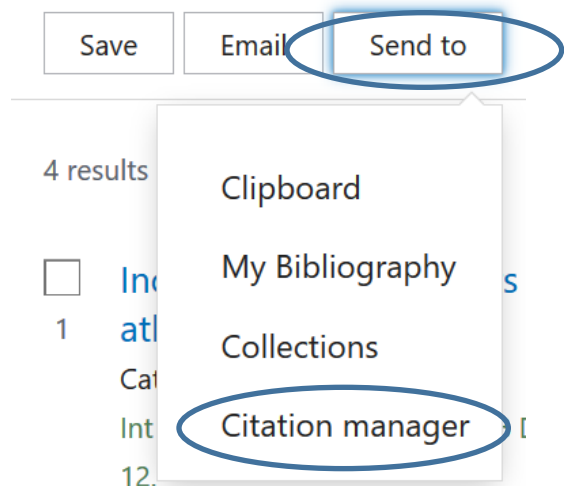
1. Select a page or specific citations and click **Export** or just click **Export**.

2. Choose **EndNote Desktop**.
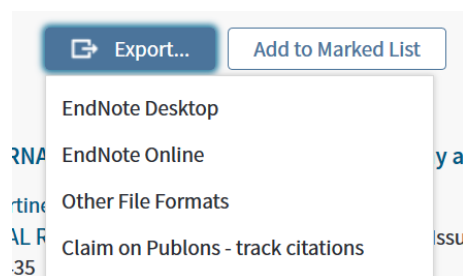
3. Change Record Content to **Full Record**.

Export Records to EndNote Desktop ⊗

◉ You have selected 2 results for export

◯ All records on page

◯ Records from: [1]   to [500]

No more than 500 records at a time.

Record Content:

[Full Record ▼]

Cancel   **Export**

4. Click **Export**.

You can also save records to your Marked List and export them from there.

CINAHL https://research.lib.buffalo.edu/CINAHL

1. Add the references you want to export to your folder. To do this, click on the blue folder with the plus sign off to the right-hand side of the citation. The folder will turn yellow when it has been added. To add batches of references more quickly, click Share. You can add a whole page of results to your folder.

2. When you are ready to export, click **Folder** at the top of the page.

3. Select the references you want to send to EndNote and then click **Export**. Save citations to a file formatted for **Direct Export in RIS Format**.

4. Click **Save** to export the file.

EMBASE https://research.lib.buffalo.edu/EMBASE

1. Select the references you want to download and click **Export**.
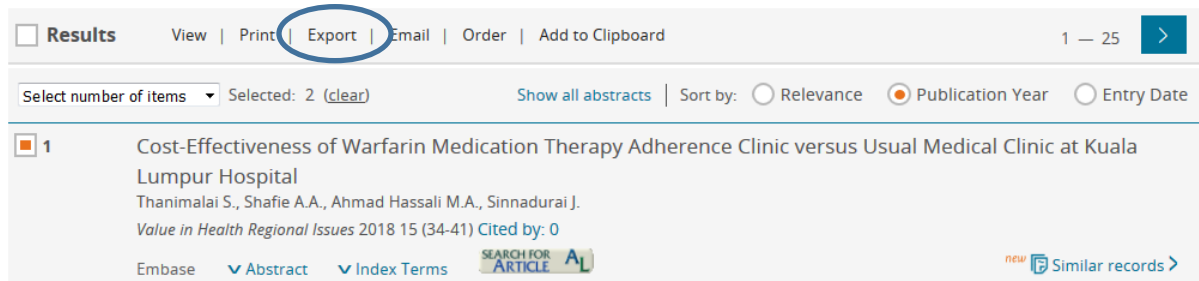
2. The default will be RIS format. Click the blue **Export** button.

3. References will be formatted for download. Click the blue **Download** button.
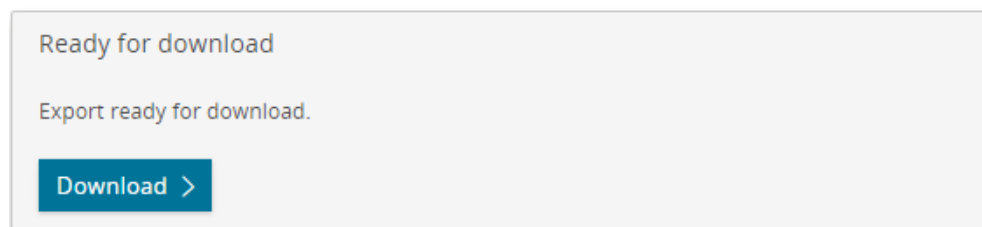
Google Scholar https://research.lib.buffalo.edu/Google-Scholar

No Google Account – export one citation at a time without changing preferences

1. Perform your search in Google Scholar.

2. Click on the quotation below the citation.

3. Choose **EndNote**.

No Google Account – export one citation at a time after changing preferences

To change your preferences:

1. Click the three bars in the upper left hand corner.

2. Click **Settings**. ⚙

3. Click **Show links to import citations into EndNote** under Bibliography manager.

4. Save your settings.

Oppositional defiant disorder.

JM Rey, G Walter - 1999 - psycnet.apa.org

Abstract In this chapter, the authors discuss the behaviors, diagnostic criteria, epidemiology, comorbidity, etiology, management, treatment, behavioral interventions, and prevention of oppositional defiant disorder (ODD). A case example is given of a 13-yr-old girl who was

☆ 𝄢 Cited by 94 Related articles All 9 versions Web of Science: 32 Import into EndNote ≫

You will now be able to Import into EndNote.

Google Account – Export Multiple Citations

1. Export multiple citations by creating or logging in with a Google account username and password.

2. From your search results, click the **star icon** for each citation you want to download. You will be prompted to enable saving to your library if you have not used this option before.

3. From **My library** select the articles you want to export.

4. Click the **Export** button icon ⬇ and choose **EndNote**.

Adding References – Online Search

Connect to an online public database (PubMed) from within EndNote and retrieve the references directly. This is helpful when searching for a known item, but is not effective as a method of browsing for articles as you do not have the ability to preview articles prior to importing them into your library.

In **Online Search Mode,** select PubMed (NLM). If it does not appear in the list go to: Tools→Online Search →select PubMed (NLM) → Choose.
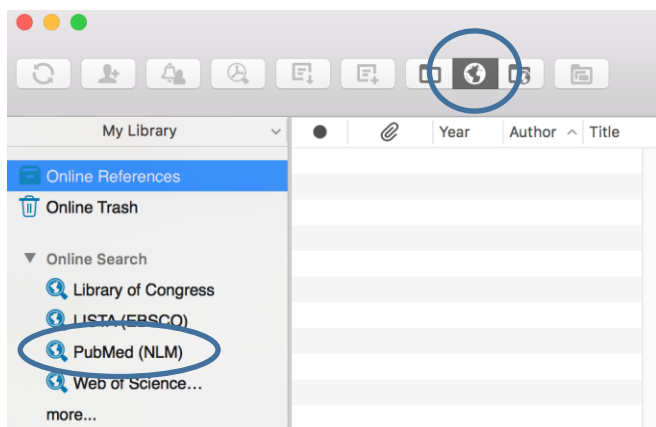
The online search box will appear in the preview screen above your EndNote library.

Enter the term(s) that you wish to search. Be sure to adjust the fields if necessary. Then, click **Search**.

A pop-up will note how many references are available for download.

Note: If you search returns a lot of results, it might be best to narrow your search.

Once you click OK, the records will load.

Once you select OK, select the references you want, either right clicking and choosing "copy to" and choosing your library or clicking on this icon located above the search box.

Groups

The groups feature allows you to organize your references by project, paper, or topic.

Create groups and group sets by going to Groups → Create Group OR Groups → Create Group Set.

Select references and drag them to the appropriate group.

Group sets allow you to create groups that belong under a larger project, paper, or topic. You can also create a group set and move existing groups into that set.
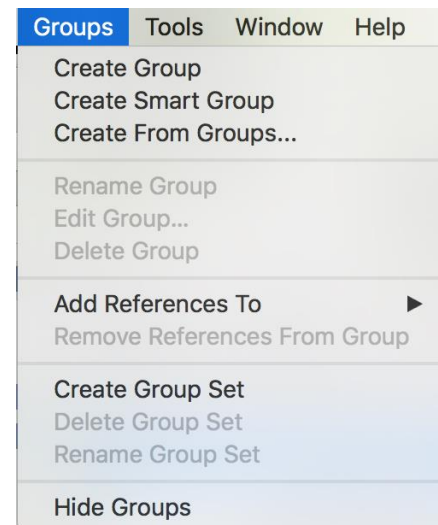
Search for Full Text Articles within EndNote

EndNote has a feature to retrieve full-text for references in your library. In order to do this, you have to do a one-time configuration in EndNote. This will enable you to retrieve the most full-text available. Copy and paste the link from the EndNote installation instructions on the library website: https://library.buffalo.edu/endnote.

1. EndNote X9 → Preferences → Find full text
2. Select all the check boxes.
3. In the Open URL path box, enter the link from the installation instructions page.
4. In the Authenticate with URL box, enter the link from the installation instructions page.
5. Click Save.

Highlight records you would like to find full text for → References → Find Full Text → authenticate (you will need to authenticate off-campus) → enter UBIT name and password → done

Then go to References → Find Full Text → Find Full Text OR click this icon

If available, the full text will download a PDF automatically to the record.

Adding References from a PDF or a Folder of PDFs on your Computer

The PDFs you are importing must have a Digital Object Identifier, or DOI, embedded in the metadata or first couple of pages. You must also be connected to the Internet unless the file is stored on your computer. Otherwise, you'll see an incomplete record that may only contain the title of the PDF like this: <Tobacco Use in Women with Lung Cancer.pdf>

PDFs must be publisher-supplied and not scanned copies.

Import a single PDF – this will create a new record and include the PDF within it.

> File → Import → File → (find it with Choose then Open)

Import a Folder of PDFs – this will create new records for each and include the PDF within it

> File → Import → Folder → (go to your saved folder location and supply folder name and OK)

De-Duping

Select references. Then go to References → Find Duplicates. You will compare the duplicates and choose which to retain. The other goes into your Trash.

Deleting References

Select a reference or a group of references. Right-click and choose Move References to Trash. Alternatively, you can click and drag references into the Trash. Right click and trash icon and empty trash. Once the trash is emptied, a reference cannot be added back into your library.

Creating a Bibliography a.k.a. "Cite While You Write"

> Note: EndNote works with Microsoft Word. Please install Microsoft Word before EndNote and make sure that your Microsoft Office programs are closed when you download EndNote. You will see a new tab in Microsoft Word called EndNote X9.

Adding a Citation to your paper using Word:

1. Type a sentence in your Word document.

2. Put the cursor where you want the reference(s) to appear.

3. Click the Insert Citation button in the EndNote X8 tab in Word.

4. Search across your library for the reference(s) you want to insert.

5. Select the reference(s) you want to insert and click **Insert**.
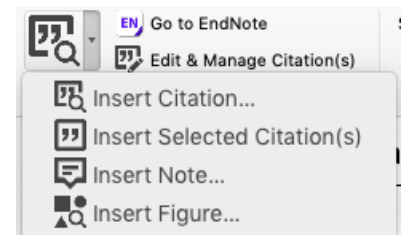
Adding a Citation to your paper using EndNote:

1. Type a sentence in your Word document.

2. Put the cursor where you want the reference(s) to appear.

3. In EndNote, select the reference(s) you want to insert.

4. Click the Insert Citation button in EndNote.

Change the bibliography style for the paper

From Word → EndNote tab → change style by clicking in drop down box → select another style (automatically updates citations and bibliography)
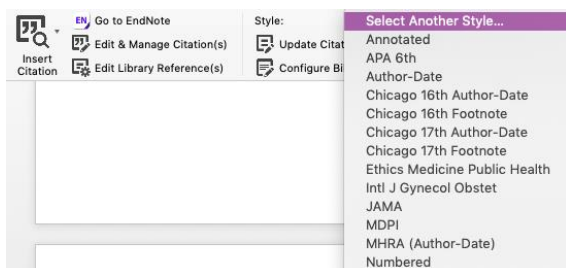
Removing a citation from your paper

The best way to remove a citation is by going to the EndNote tab in Word → Edit & Manage Citation(s) → Edit & Manage Citations → Remove Citation
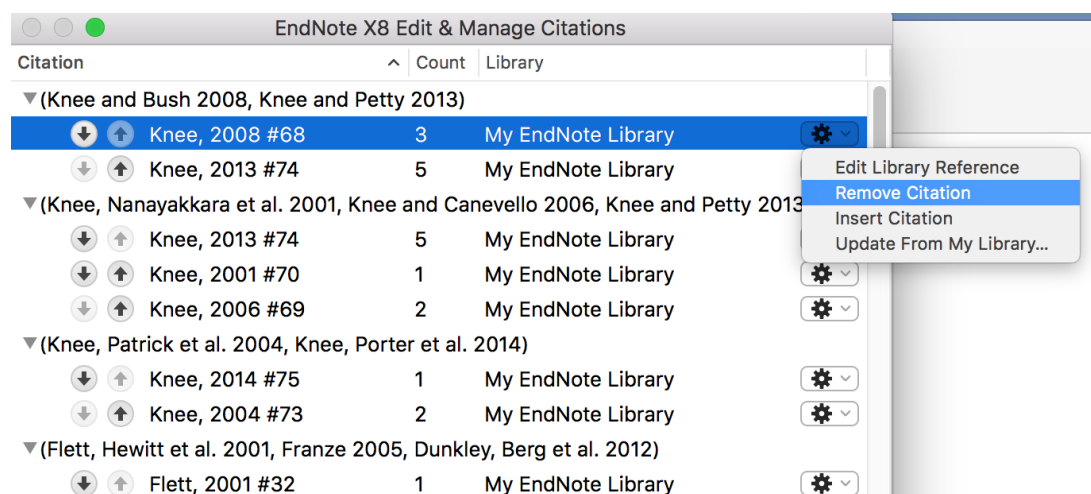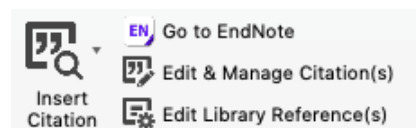
Editing your bibliography/references

After you've created a Word document with EndNote references, do NOT attempt to make corrections or changes to the citations in Word; these changes will not remain after the Word document is closed. All modifications must be made in the record in the EndNote library. Then select **Update Citations and Bibliography** in Word from the EndNote tab.
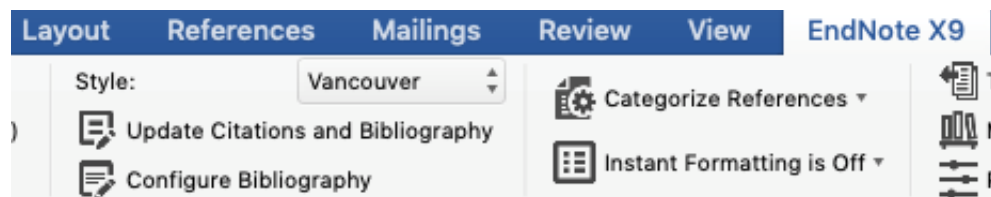
Additional Help and Training Resources

EndNote Help
EndNote Training: **http://clarivate.libguides.com/endnote_training/home#start**
EndNote provides excellent information and troubleshooting help at: **https://endnote.com/**

Output Styles
Download additional output styles here: **https://endnote.com/downloads/styles**. Be sure to save the style once you download it. For example, APA 7th is now available for download from the site.

Sharing your EndNote Library
- Option 1. Send via email. To send your EndNote Library by email, create a Compressed Library and send it as an attachment. Note that some email providers may limit the size of the attached file. File → Compressed Library → Create → with or without File Attachments → select All References, Group, or Selected References → OK
- Option 2. Use the My EndNote Web/EndNote online option. You have to sync your main library to the cloud and then you can share groups of references with other EndNote online users.
- Option 3. Library Sharing. You can share your synced library with up to 100 collaborators. They must have EndNote desktop and use EndNote online. They will have read and write access to your library, but there is a record of what changes have been made.
- Option 4. Save the library to a shared network drive.