

*Data Management Tool for Research*

# EndNote-X4

Brief Manual

*By*

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<http://www.lib.vt.edu/endnote/endnotemanual.pdf>

## Creating an EndNote Library/Database

1. Open the EndNote Program.
2. Click on the picture in the middle which says:  
“**Create a new EndNote Library**”
3. Click **OK**.
4. In the “**File-Name**” box, type in a name for your library/database, (e.g. **REFERENCE** or **BIBLIOGRAPHY**).
5. Click **SAVE** button and you have created an EndNote Library with three Panels:
  - A **Groups** Panel
  - A **Library** Panel
  - A **Search** Panel

## **To Search EndNote Using Temporary Library Mode**

- Open your EndNote Library.
- At the left hand side of the ribbon, click on the “**Globe**” icon.
- Go to **TOOLS**, click on **ONLINE SEARCH**.
- A **CHOOSE A CONNECTION** window opens up listing online library catalogs and databases.
- Select a library online catalog or database and click **CHOOSE** and the search panel will show that you are now connected to the online catalog or database.
- Enter your search terms and click **SEARCH**.
- A **Confirm Online Search** window opens up showing the number of retrievals.
- Click **OK** and the citation will be imported into the **Temporary** library.
- Select the citations you want to keep.
- Go up to **REFERENCES** and select **COPY REFERENCES TO** and select the EndNote library you want the citations to go to.
- Your selected citations will be moved to the EndNote library you have selected (you will see them be clicking on **ALL REFERENCES**).
- Close the Temporary Library.
- You’ll be asked if you want to discard all the online references.
- Click **OK**.
- Go to **FILE** and open up your library and you will see the citations have been imported.

## **To Search EndNote Using Permanent Library Mode**

- Open your EndNote Library.
- At the left hand side of the ribbon, click on the “**Globe plus Books**” icon.
- Go to **TOOLS**, click on **ONLINE SEARCH**.
- A **CHOOSE A CONNECTION** window opens up listing online library catalogs and databases.
- Select a library online catalog or database and click **CHOOSE** and the search panel will show that you are now connected to the online catalog or database.
- Enter your search terms and click **SEARCH**.
- A **Confirm Online Search** window opens up showing the number of retrievals.
- Click **OK** and **all** the citation will be imported into the **Permanent** library.
- Select the citations you **don't** want to keep.
- Go up to **REFERENCES** and scroll down to **REMOVE REFERENCES TO TRASH**.
- On the **GROUPS** panel, click on **ALL REFERENCES** to see all the citations in your permanent Library.

## Importing Search Retrievals through Filters

(This procedure is used when you have to **import** your search retrievals.

Save your search retrievals as a text file with field tags (e.g. AU, TI, SO, etc.)

1. Open the EndNote Library.
2. Go to **FILE** and scroll down to **IMPORT**, (*An IMPORT window appears*).
3. Click on **Choose File** button.
4. Go to the site where you have saved your search file (e.g. the desktop), and click on the file.
5. Click **OPEN** and an **Import Window** opens up (*The filename should appear on the Import Data File window*).
6. From the **“Import Option”** window, select the database (*e.g. PubMed, CABDirect, Web-of-Knowledge*) from the appropriate provider (*e.g. NLM, SP, CSA*) that you searched in. Click on **Other Filters** the filter is not on the List. (*The name of the import filter will appear in the “Import Option” window*).
7. From the **“Duplicates”** window, select your option to exclude duplicates or to import all.
8. Click the **IMPORT** button. (*Your EndNote Library/Database will now have all the imported citations*).

## “Exporting” Search Retrievals from CABDIRECT

- After retrieving your search results from the database, mark the needed citations.
- Then click on **Export Marked Citations** under **Tools**.
- Then choose the format you want to export and click the Export **EndNote (RIS) format** button.
- An **Opening Citations.Ris** window opens up.
- Click the radial button to the left of **Open with ResearchSoft Direct Export Helper (default)** and then click **OK**.
- The citations will be imported into your EndNote Library.

## “Exporting” Search Retrievals from COMPENDEX (from Engineering Village)

1. After retrieving your search results from the database, mark the needed citations, and click the **Download** button.
2. **“Download Selected Records”** window opens up.
3. Check the radial button to the left of **“RIS, EndNote, Reference Manager”**.
4. Click the **Download** button and **“You have chosen to open”** window opens up.
5. Check the radial button to the left of **“ResearchSoft Direct Export Helper”** and then click **OK**.
6. The marked citation will be imported into your EndNote Library.

## **“Exporting” Search Retrievals from EBSCOhost databases** **(e.g. ERIC, PsycINFO, etc)**

1. After retrieving your search results from the database, mark the needed citations by clicking on **Add to Folder** below each citation you want to keep.
2. Then click the **Save Searches/Alert** above.
3. Click on the **folder-icon** in the “blue ribbon” above.
4. A screen with the citations that you Added to Folder appears.
5. Check the square boxes to the left of the citations.
6. Click on the **Export** icon (the one with a page and an arrow).
7. Check radial button to the left of **Direct Export to EndNote, Procite, or Reference Manager**.
8. Click **SAVE**.
9. An **Opening Delivery** window appears.
10. Check the radial button to the left of **Open with (Web Export Helper)** and click **OK**. This will open up the EndNote program and a **Select a Reference Library** window opens up.
11. Go to where your EndNote database is located (e.g. desktop).
12. Click on the library and then click **OPEN** and the citations will be imported.



## Create Smart Group

- Open our EndNote Library and click **All References**.
- Click on **GROUPS** above and scroll down to **Create Smart Group** and a Smart Group Window opens up.
- In the **Smart Group Name** window enter the name of the Group you want to create e.g. **Iron**.
- Click the arrow in the window which has “Author” and select the field you want EndNote to search, e.g. **Keywords**, and in the blank window to the right of it enter the term, eg. **Iron**.
- Then click the arrow in the window which has “Date” and select **Abstract** and in the blank window to the right of it enter the term to be searched.
- Repeat the procedure for the third window which shows **Title**.
- In the extreme left hand column, select the Boolean **OR** in both the windows.
- Then click the **Create** Button.
- The new Smart Group will be created showing the number of Iron-citations in you EndNote Library.
- To enter the word stem of a word to catch singular and plural and other variant forms of the word, e.g. Fluorescence, tec., enter the Word Stem, e.g. **Flourese** and in the middle column where it says **Contain**, click on the arrow and select **Word Begins With**.

## Create Custom Group

- Open your EndNote-X2 Library and click **All References**.
- Click on **GROUPS** on the top of the screen and scroll down to **Create Group**.
- On the Group Panel on the left hand side of the screen, a **New Group** opens up under **Custom Groups**.
- Type in the name of the group you want to create, e.g. **Reviews**, or **Methodology**, etc., and press **ENTER**.
- Then click **All References** to go to your Library.
- Hold down the **CRTL-key** and select the citations you want to put into the Group.
- Release the **CRTL-Key**.
- Then click on one of the citations and **drag and drop** (the other citations that you have selected will follow) into the (Reviews) group that you have created.

## To Delete Group

- Click on the group to be deleted.
- Go up to **GROUPS** and select **Delete Group**.

## **To Delete Citations**

- Open your EndNote Library and click on **All References**.
- Select citation to be deleted from your EndNote Library.
- Go up to **REFERENCES**.
- Scroll down to **MOVE REFERENCES TO TRASH**.

## **To Retrieve from Trash**

- Click “Trash” in the Group Panel on the left hand side of the screen.
- The citation will appear in the “Reference Panel”, i.e. your EndNote Library.
- Click on this citation and **drag and drop** citation into **ALL REFERENCES**.

## Entering Images into EndNote Library

1. Open your EndNote Library.
2. Go to **REFERENCES** and select **New References**. A “*New Reference*” window opens up.
3. From the **Reference Type** window’s pull-down menu, select **Figure**.
4. Enter the name of the creator, title of the image, date, etc.
5. When you get to the **Figure** field click on it and go up to **REFERENCES** above and select **Figure** and **Attach Figure**.
6. An “**Attach Window**” opens up.
7. Click the **Choose File** button.
8. Go to where you saved your image (e.g. desktop or a folder) and highlight it and click **OPEN**.
9. The image will appear in the Figure Field.
10. Go to the “Caption” field and enter a caption.  
*(this is optional)*
11. Close the entry it will be saved into your EndNote Library.

## **Entering Charts, Tables, Diagrams, PDF-files, and PowerPoint, into EndNote Library**

1. Open your EndNote Library.
2. Go to **REFERENCES** and select **New References**. A “New Reference” window opens up.
3. At the **Reference Type** window on top, click on the down-arrow and select **Charts** or **Tables** from the pull-down menu.
4. Enter the data that you want to enter for the Diagram, Table, Graph, etc.
5. When you get to the **Figure** field click on it and go up to **REFERENCES** above and select **Figure** and **Attach Figure**.
6. An “**Attach Figure**” window opens. Click the **Choose File** button.
7. At the **Look In** window select the site where you have saved your diagram, e.g. the Desktop or Folder).
8. Locate the **Diagram, Table, Graph, PowerPoint or PDF file** you want to insert and **Click on the file** and then click **Open**.
9. The **New Reference** window re-appears, showing an icon of imported item in the figure Field.
10. Go to the **Caption** field and type in a caption for your Table (*this is optional*).
11. **Close** the window and the imported Diagram, Table or Graph will be saved into your EndNote Library.

## **Importing a PDF into an Image field in a citation record in EndNote Library**

1. Open your EndNote Library.
2. Go to **TOOLS** and scroll down to **SEARCH LIBRARY**.
3. Enter search terms and click **SEARCH**.
4. Double click on the retrieved citation to open the citation.
5. Scroll down and click on the **Figure** field.
6. Go back up and click on **REFERENCES** and scroll down to **Figure** and **Attach Figure**.
7. The Attach Figure window opens, click **CHOOSE FILE** button.
8. Go to the location (e.g. desktop, My Document folder, etc.) where you've saved your PDF file.
9. Click on the PDF file and then click **OPEN**.
10. The PDF file will be imported into the citation.
11. Close the citation.

## **Manually Entering Bibliographic Citations/Reference**

This is the procedure for entering references such as books, book chapters, proceedings, electronic citations, patents, etc. and articles not available through database searches.

1. Open your EndNote Library.
2. Go to **REFERENCES** and select **New Reference**.  
(This opens up an empty New Reference Window)
3. At the **Reference Type** window click on the arrow to the right of the window and select the reference type you want to enter manually (e.g. book section, conference paper, patent, thesis, etc).
4. Enter the bibliographic data into each of the fields in the reference. *(The information on the Title page of the publication is essential information for EndNote to cite that publication correctly).*
5. For **Authors**, **enter each author on a separate line**.
6. When you have finished, **CLOSE** the reference to save it to the EndNote library.

## **Inserting Reference from EndNote Library into Manuscript and Formatting Bibliography**

1. Open your EndNote Library that contains the references you wish to cite and minimize it so that it will not be in the way.
2. Open the Word manuscript.
3. Click on **EndNote** on the tool bar.
4. Position the cursor in the text in our Word-document where you would like to put the citation.
5. In the **Citation section** click on the arrow next to **Insert Citation** and scroll down to **Find Citation**.
6. A **Find Citation(s)** window opens up.
7. Enter your search for the references in the **“FIND”** window, and click the **Search** button. *(Reference(s) matching your search will be retrieved)*
8. Click on the reference(s) you want to cite and then click the **INSERT** button on the lower right hand corner.
9. Repeat steps 4 through 8 until you have cited all your references.
10. To format the bibliography, go to the **Bibliography section** and click on the arrow next to Bibliography.
11. An **EndNote Format Bibliography** window opens up.
12. Click the **BROWSE** button on the right side of the **With Output Style** window.
13. Select the journal/bibliographic style you want from the **With Output Style** window and then click the **OK** button and your citations will be formatted according to the style chosen.



## **Incorporating Photographs, Charts, Graphs, Tables, etc. in the figure field into the Manuscript**

1. Open your EndNote Library that contains the figures you wish to incorporate into your manuscript and minimize it so that it will not be in the way.
2. Open the manuscript that you have saved on your Word Processing Program (e.g. Microsoft Word).
3. Click on **EndNote** on the tool-bar.
4. Position the cursor in the text in our Word-document where you want the image or figure to appear.
5. In the **Citation** section, click on the arrow next to **Insert Citation** and scroll down to **Find Figure**.
6. An **EndNote Find Figure(s)** window opens up.
7. In the **Find** box, enter the name you have assigned to the Photograph, Chart or Table in your EndNote Library which you want to insert.
8. Click **SEARCH** (*EndNote displays a single matching reference. The file attachment icon appears in the lower part of the screen*).
9. Click the **INSERT** button at the lower right corner of the screen. (*The Photograph, Chart or Table will load slowly and appears at the location where you want it to be.*)
10. To resize the incorporated Photograph, Chart or Table to fit on the page, **Click on a corner of the photograph/graph/chart** and then hold down the **SHIFT-key, and drag the photograph/graph/chart** to resize it proportionally.
11. Go to **FILE** and **SAVE**. (**since it is now a Word File**)

## **E-Mailing a Copy of EndNote Library**

1. Open EndNote Library, and Click on **All References**.
2. Go to **FILE**.
3. Scroll down to **COMPRESSED LIBRARY** ..... and **Create & Email** .....
4. This saved compressed copy of the library will have an extension **.enlx**.
5. Then click **Next**.
6. **SAVED** the compressed library on the desktop or folder.
7. The saved copy of your EndNote Library can then be sent to your collaborator as an attached document to your e-mail.

## **Copying an EndNote Library into another EndNote Library**

1. Double click on the library with an extension **.enlx** to open it.
2. Go to **EDIT** and **SELECT ALL**.
3. Go to **EDIT** and **COPY** (you have now copied the library).
4. Open the library2 you want to copy to.
5. Go to **EDIT** and **PASTE**.
6. The citations are now pasted in your library2 and they are high-lighted.

## Sending a Group from EndNote

- Open the EndNote Library and click on the **Group** you want to send.
- Click on a citation and then press **CTRL+A** to highlight all the references in the group.
- Go to **FILE** and scroll down to **EXPORT**. An *Export File Name* window opens up.
- Set the output style to **Refman (RIS) Export** in the **Output Style** window.
- Make sure that **Export Selected Reference** box is checked.
- **SAVE** the references as a text file on the desktop.
- Save this text file as an attachment in your e-mail.
- When your colleague receives the file, he/she **IMPORT** it into his/her EndNote library selecting **Refman(RIS)** as the filter.

## **Set EndNote to Not Import Duplicates**

- Open the EndNote Library.
- Go to **EDIT**.
- Select **PREFERENCES** and the EndNote Preferences window opens up.
- Select **Duplicates** on the left hand panel.
- On the right hand column, under **Compare references based on the following Fields**, check the fields you want.
- Under the **Online Search Results**, check the square box next to **Automatically discard Duplicates**.
- Then click **OK**.

## **Downloading Output Styles from EndNote Homepage**

1. Activate browser and go to EndNote's homepage at: <http://www.endnote.com>.
2. Click on **support & services**.
3. Scroll down to **Downloads** and select **Output Styles** and click **More....**
4. The EndNote Output Styles window will appear.
5. Click the **Sorting Options** tab.
6. Click on the arrow of the **"Sort by"** window and select either **Discipline** or **Style Name** or **Date**.
7. Click the **Re-sort Files** button on the right side of the screen, and the output styles will be sorted by what you have selected, (e.g. the discipline or the Journal Style Name or Date).
8. Scroll and locate the journal output style you want to download, (e.g. Veterinary Microbiology, Agricultural and Forest Entomology, etc).
9. Click on the **Download** (on the far right) for the selected journal style, and **"You have chosen to open"** window opens up.
10. Click the radial button to the left of **Save File** and then click **OK**.
11. Save the downloaded style to the desktop.
12. You have now downloaded the journal output style. Close the EndNote Homepage.
13. Go to the Desktop and **right-click** on the **"downloaded journal output style"** icon and scroll down and click **CUT**.
14. Double-click **My Computer** to open the C-Drive and then open the **Program File** folder.
15. Locate and open the **EndNote** folder.
16. Go to **EDIT** and **PASTE**. The downloaded journal output style icon will appear on the screen.

17. Click on the downloaded journal output style icon and drag and drop the icon into the **Styles** folder. You have now added the downloaded journal output style to your folder of output styles.

## **Downloading Import Filters from EndNote Homepage**

1. Activate browser and go to EndNote's homepage at: <http://www.endnote.com>.
2. Click on **support & services**.
3. Scroll down to **Downloads** and select **Import Filters** and click **More...**
4. The EndNote Import Filters window will appear.
5. Click on the button of the "Sort by" window select either **Information Provider** or **Database** or **Date**.
6. Click the **Re-sort Files** button on the right side of the screen, and the filters will be sorted by what you have selected, (e.g. Database or Information Providers).
7. Scroll and locate the filter for the database you want to download, (e.g. ERIC, Biological Sciences, Compendex, etc).
8. Click on **Download** (on the far right) for the selected database, and "**You Have Chosen to Open**" window opens up.
9. Check the radial button for **Save to Disk** and then click **OK**.
10. Save the downloaded filter on the desktop.
11. You have now downloaded the filter. Close the EndNote Homepage.
12. Go to Desktop and **right-click** on the "**Downloaded Filter**" icon and then scroll down and click **CUT**.
13. Double click **My Computer** to open the C-Drive and open the **Program File** folder.
14. Locate and open the **EndNote** folder.

15. Go to **EDIT** and **PASTE**. The downloaded filter icon will appear on the screen.
16. Click on the downloaded filter icon and drag and drop the icon into the **Filter folder**. You have now added the downloaded filter to your file of filters.

## **Downloading Connection Files from EndNote Homepage**

1. Activate browser and go to EndNote's homepage at: <http://www.endnote.com>.
2. Click on **support & services**.
3. Scroll down to **Downloads** and select **Connection Files** and click **More....**
4. The EndNote Connection Files window will appear.
5. Click on the **Sort by** arrow and select what you wish to sort by (e.g. date, database or provider).
6. Click the **Re-sort Files** button on the right side of the screen, and the Connection Files will be sorted by what you have selected.
7. Scroll and locate the Connection File you want to download.
8. Click on the **Download** (on the far right) for the selected Connection File.
9. Check the radial button for **Save to Disk** and then click **OK**.
10. Save the downloaded Connections File on the desktop.
11. You have now downloaded the Connection File. Close the EndNote Homepage.
12. Go to the Desktop and **right-click** on the **"Downloaded Connection File"** icon and scroll down and click **CUT**.
13. Double-click **My Computer** to open the C-Drive.
14. Locate the **Program File** folder and open it.

15. Locate and open **EndNote** folder.
16. Go to **EDIT** and **PASTE**. The downloaded Connection File icon will appear on the screen.
17. Click on the downloaded journal output style icon and drag and drop the icon into the **Connection** folder. You have now added the downloaded Connection File into the folder.

## **Merging Documents**

1. Open your EndNote Library that you used to write your document and minimize it.
2. Open the document to be merged.
3. Click on the **EndNote** tab on top.
4. Choose **Convert Citations and Bibliography** and **Convert to Unformatted Citations**.
5. Press **[CTRL]+A** on the keyboard to highlight everything.
6. Press **[CTRL]+C** to copy the highlighted text.
7. Close the document and you'll be asked whether you want to save the changes, click **NO**.
8. Then in the blank Word document press **[CTRL]+V** to paste and then **SAVE**.
9. Repeat Steps 2 through 7 until all the documents are pasted in the merged Word document.
10. Once you have pasted all the documents in the merged Word document, make sure you have all the EndNote tab and **Format** the Bibliography.
11. A Bibliography will be formatted at the end of the merged document.



## **To Enter Corporate Authors**

1. To Enter a Corporate Author, put a comma after the name:  
e.g. **U.S. Department of Agriculture,  
Apple Computer Inc,**
2. This ensures that the entire name is treated as a first name, so no name manipulation will be applied.
3. If the Corporate Author name includes a comma in the name itself, use two commas in place of the first comma:  
e.g. **University of California,, Irvine**

**EndNote treats this as a last name followed by a blank first name. Then, everything after the (blank) first name is appended, including a second comma in the name. The formatted result is the Corporate Name with the comma in place.**

## **Edit (Add or Remove) Citations in Manuscript**

1. Open the EndNote Library and minimize it.
2. Open the manuscript that you want to edit.
3. Click on the EndNote Tab on the top of the screen.
4. Click on **EDIT & Manage Citation(s)**.
5. A window opens up showing your citations.
6. Click on the citation you want to delete and then click the arrow next to **Edit Reference**.
7. In the sub-menu that appears click **Remove Citation** and then **O.K.** (the citation is removed from the in-text reference but it is still in the Bibliography).
8. Format the Bibliography again and the citation will be deleted from the Bibliography.
9. Close your document and you'll be asked if you want to save the changes.
10. Click **Yes**.

# HIDDEN CODES APPEARING IN WORD DOCUMENT

## On Windows: Word 2007

- Within Microsoft Word 2007 click the Office icon in the upper left, and then click **“Word Options”** at the bottom of this window.
- Click on the **Advanced** option on the left hand side and scroll down to the section titled **“Show Document Content”**.
- Uncheck the item titled **“Show Field Codes Instead of their values”** and click **OK**.
- The document should now appear normal.

## On Windows: Word 2003/2002/2000

- In Word, go to the **“Tools”** menu, and select **“Options”**.
- Here, on the **“View”** tab, uncheck the box named **“Field Codes”**.
- Click **“OK”**.
- The document should now appear normal.

## On A Macintosh:

- In Word, go to the **“Word”** menu, and select **“Preferences”**.
- Here, on the **“Menu”**, uncheck the box named **“Field Codes”**.
- Click **“OK”**.
- The document should now appear normal.

This setting is a universal setting for Word, so making this change should fix any documents that are currently displaying the field codes.

## Merging EndNote Libraries

1. Open both EndNote libraries. You can use the Window menu to switch between the two.
2. In one library, click on the **EDIT** menu and click **Select All**.
3. Click on the **Edit** menu again and select **Copy**.
4. Switch to the destination library.
5. Click on **Edit** and select **Paste**.

## **Importing PDF and Generates Citation in EndNote Library**

With EndNote-X4 you'll be able to import the PDF file, and if that article has a DOI number EndNote-X4 will automatically generate a bibliographic citation to go with the PDF. This way, you don't have to import the bibliographic citation.

The procedure is as follows:

- Open your EndNote-X4 Library.
- Go to **File** and scroll down to **Import**.
- Choose **File** in the Sub-Menu that opens up.
- An **Import File** window opens up.
- Click the **Choose ...** button and go to where you store your PDF file, highlight it and click **OK**.
- In the **Import Options** window choose **PDF**.
- Then click **Import**.
- The PDF file will be imported and if the article has a DOI number a citation will also be generated for the PDF full text.

## **Importing a Folder of PDF Files**

With EndNote-X4 you'll be able to import a whole folder of PDF files. For those articles with DOI numbers, EndNote-X4 will automatically generate bibliographic citations to go with those PDFs. This way, you don't have to import the bibliographic citations.

The procedure is as follows:

- Open your EndNote-X4 Library.
- Go to **File** and scroll down to **Import**.
- Choose **Folder ...** in the Sub-Menu that opens up.
- An **Import Folder** window opens up.
- Check the square box to the left of **Include Files in the Subfolders**.
- Click the **Choose ...** button and go to where you store your folder of PDF files, highlight it and click **OK**.
- In the **Import Options** window choose **PDF**.
- Then click **Import**.
- The PDF files in the folder will be imported and for those articles that have DOI numbers citations will also be generated. For those without, the PDFs will be imported without the corresponding citations.

## **Setting EndNote to Maximize Full Text Search**

- Open your EndNote Library.
- Go to **EDIT** and click on **PREFERENCES** to open up the EndNote Preferences window.
- On the left hand column click on **FIND FULL TEXT**.
- Check the square boxes for: ISI Web of Knowledge; DOI; PubMed; Open URL.
- In the **Open URL Path**, enter  
<http://su8bj7jh4j.search.serialsolutions.com/>
- For **Authenticate with**, enter  
<https://login.ezproxy.lib.vt.edu:2443/login?qurl=>

**This allows you to access the library resources from off-campus like your home or off-campus facilities.**

- Then Click **OK**.