

~ ENDNOTE ~

**Adding References to Your EndNote Library**

The exercise set covers **manually** adding references, as well as adding references from PubMed (via a **text file**), and from Global Health (via **direct export**). Instructions on adding references to EndNote from many databases/catalogs are at [www.lib.berkeley.edu/BIOS/end\\_import.html](http://www.lib.berkeley.edu/BIOS/end_import.html) and [www.lib.berkeley.edu/sciences/managing\\_citations](http://www.lib.berkeley.edu/sciences/managing_citations).

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**Adding/Modifying EndNote Display Fields**

1. Under the **Edit** menu, choose **Preferences**, then click **Display Fields**.
2. Use the drop-down menus to add/change the field display in your EndNote library. Up to 8 fields can be displayed. The **Heading** field text is what will display in your window, and may be modified if desired.
3. Click **OK**.

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**Importing a PDF file and Creating a New Record Automatically**

1. Under EndNote's **File** menu, choose **Import ► File....**
2. Click the **Choose** button to locate and select the PDF file you want to import.
3. Choose the **PDF** import option from the **Import Option** list.
4. Click **Import** to import the file and create a record.

The new record will include bibliographic information mined from the **Digital Object Identifier (DOI)** embedded in the PDF file, such as title, author, volume, issue, page, year, and DOI. The file is imported to the EndNote library's **.DATA folder**. Add keywords or copy/paste the abstract to the new reference if desired – this information typically does not import from a PDF file – and peruse the imported data to make sure it imported as expected.

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**Finding and Retrieving Full Text**

To do this from an *off-campus location*, you need to install and be logged into the **campus VPN**. See [www.lib.berkeley.edu/Help/vpn.html](http://www.lib.berkeley.edu/Help/vpn.html) for information. Links to the full text are put into the **File Attachments** field and the full text files are saved to the **.DATA folder**. Note that occasionally, full text may not be found even though UCB or UC has licensed access to the item.

1. In your EndNote library, **select** the reference(s) for which you want to find full text.
2. Under the **References** menu, choose **Find Full Text > Find Full Text**, then click **OK**.
3. In the **My Library** column, you should see **Searching** under **Find Full Text**, then **Found** and/or **Not Found** with a number of items by each.

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**Adding/Linking a File to an EndNote Reference**

Nearly any file type can be *attached or linked* to a reference in your library.

1. Select (click on) a reference in your library.
2. Under the **References** menu, select **File Attachments ► Attach File ...** (...continued on next page)

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3. Use the dialog box to locate and select a file that you would like attached to that reference. (To create a **file link**, **uncheck** the box next to: **Copy this file to the default file attachment folder and create a relative link**. Otherwise, the file will be **added** to your EndNote library's **.DATA folder**.)
  4. Open the reference and scroll down to File Attachments to check that the file was linked.
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**Making a Change in More than One Record at a Time**

1. **Select** the records you wish to modify.
  2. Go to **References**, select **Show Selected References**.
  3. Go to **Tools**, select **Change and Move Fields**.
  4. Under the **Change Fields** tab, select the field you wish to change:
    - a. Select the appropriate field in the drop-down menu
    - b. Select the desired radio button
    - c. Enter text in the box on the right.
    - d. Make a choice in the checkboxes near the bottom of this dialog box.
    - e. Click **OK**, then **OK**, then **OK**.
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**Copying or Moving References from One EndNote Library to another EndNote Library**

1. Open the two EndNote libraries and select the citation(s) to copy or move.
  2. Under EndNote's **Edit** menu, choose **Copy** or **Cut**
  3. Open the 2nd EndNote library. Under the **Edit** menu, select **Paste**
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**Moving References from EndNote to RefWorks**

1. In RefWorks, go to the **References** menu and choose **Export**.
  2. Select the references you want to export (e.g., All, or by folder), verify the **Bibliographic Software** button is selected, and click the **Export to Text File** button
  3. A new browser window opens with your references presented in a structured format. (If the references do not appear in a new Web browser window automatically, click **Download It**.)
  4. **Save** your references to a text file by selecting **File > Save As**.
  5. Create a new EndNote library, or open an existing one to import the text file.
  6. From the EndNote **File** menu, choose **Import**.
  7. Click the **Choose File** button to locate the file saved from your RefWorks account.
  8. On the **Import Option** drop-down list, choose **Reference Manager (RIS)**.
  9. Click the **Import** button. EndNote will present your references in a library window. You can view all references in a library by selecting the *References* menu and *Show All References*.
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**Backing up Your EndNote Library**

1. Open your library and click on **Save a Copy ...** under the **File** menu.
  2. Choose a location to save a copy of your library.
  3. Rename the copy if desired – the default name is **[Libraryname] Copy** – and click **Save**.
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### **Using Cite-While-You-Write**

#### **Adding citations to your Microsoft Word document:**

1. Type your document and when you get to a place where you want to add a citation, go to **Tools** (in Word) - **EndNote X4 - Find Citation(s)**.
2. Search for and find the citation you wish to insert; **double-click** it to add it to your Word document.

#### **Changing/deleting citations to your Word document:**

1. Select the citation you want to change or delete.
2. Go to **Tools - EndNote X4 - Edit Citation(s) - Insert** (if you want to edit a citation display)/**Remove** (if you want to delete a citation.) **Do NOT use the Backspace or Delete keys** on your keyboard to modify in-text citations; otherwise, the EndNote formatting will be lost.

#### **Sending your Word document to a publisher:**

Publishers frequently want the Word document to be stripped of all formatting codes.

1. Save a copy of your document – see “Backing Up ...,” above.
2. Go to **Tools - EndNote X4 – Remove Field Codes**. Once field codes are removed you can neither add/modify/delete citations nor reformat the bibliography. Make a copy of your document **before** you remove the field codes.

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### **Manuscript Templates**

You can create a “submission-ready” Microsoft Word document using a predefined manuscript template.

1. From EndNote’s **Tools** menu, select **Manuscript Templates**.
2. The Templates folder should automatically open. **Select and open** the template named for the desired style or journal to which you intend to submit your manuscript.
3. A new Word document will open, based on the template file, and a wizard will guide you through the process of writing your paper. **NOTE:** The first time you launch the manuscript template wizard, you may be asked about macros. Select “**Always trust ...**” then **Accept Macros** to continue.
4. Enter the information requested by the wizard. Click **Next** after each operation. If you are unsure of what to enter, just click **Next** to move on. At the final wizard window, click **Finish**, and start writing.

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### **EndNote Content Files**

**EndNote Import Filters:** As databases change or information providers obtain new databases, you may need to download a new import filter. This ensures that citations are imported correctly into your library.

1. Open a web browser and go to: **<http://www.endnote.com/support/enfilters.asp>**
2. Find the filter you want and click **Download**.
3. When prompted, **Save** the **xxx.enf** file in the **Filters** folder in **C:\Program Files\EndNote X4\**.

**EndNote Output Styles:** Output styles may change over time, and new styles frequently appear.

1. Open a web browser and go to: **<http://www.endnote.com/support/enstyles.asp>**
2. Find the style you want and click on **Download**.
3. When prompted, **Save** the **xxx.ens** file in the **Styles** folder in **C:\Program Files\EndNote X4\**.

### **EndNote Help**

#### **EndNote (etc.) Help and Tutorials (Public Health Library)**

<http://www.lib.berkeley.edu/PUBL/endnote.html>

*Includes handouts/exercise sets from classes and **NEW** tutorials on importing citations*

#### **EndNote FAQs (Thomson Reuters)**

<http://www.endnote.com/support/faqs/index.asp>

*These FAQs are the best place to go for help with most EndNote problems or questions*

#### **EndNote Tutorials, versions X2 through X4 (Thomson Reuters)**

<http://www.endnote.com/training/>

#### **EndNote Tip Sheets, versions up to X1 (Thomson Reuters)**

<http://www.endnote.com/support/entips.asp>

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### ~ REFWORKS ~

#### **Adding References to Your RefWorks Database**

The exercise set covers **manually** adding references, as well as adding references from PubMed (copy/paste) and PolicyFile (direct export). Instructions on adding references to RefWorks from many databases/catalogs are at [www.lib.berkeley.edu/BIOS/ref\\_import.html](http://www.lib.berkeley.edu/BIOS/ref_import.html) and at [www.lib.berkeley.edu/sciences/managing\\_citations](http://www.lib.berkeley.edu/sciences/managing_citations).

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### **RefGrab-It**

**RefGrab-It** lets you import data from web pages into your RefWorks database as references.

1. Install **RefGrab-It** in your browser. Go to **Tools > RefGrab-It**
2. When viewing a web page you wish to import into your RefWorks database, click the **RefGrab-It icon** in your browser toolbar or favorites list.
  - ✓ RefWorks will identify the Title and the URL of your current webpage and give the option to import it (with the *Ref Type = Web Page*) into your RefWorks account.
  - ✓ If an **ISBN**, **PubMed ID**, **COinS**, or **DOI** exist on the web page, **RefGrab-It** will automatically search various web resources behind the scenes to get supplemental information, so you will be able to import it with the correct Ref Type
  - ✓ When using **RefGrab-It** on a web page, it automatically opens a *temporary results page* in a new window. You can view the information, and then decide if you want to import the data into your RefWorks database
  - ✓ More information, including download instructions, is available in RefWorks: see **Help > Getting References Into You Account**

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#### **Attaching Files to References in RefWorks**

1. Click **Edit** on any reference
2. Click **Browse...**, to the right of the **Attachments** box
3. Locate the file you wish to attach. The maximum file size is 20MB.
4. Click **Add Attachment**. Note the thumbnail preview of the attachment in the Edit Reference view.

*(...continued on next page)*

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5. Click **Save Reference**, then **Back to Reference List**
  - ✓ You will see a *paper clip icon* in the reference indicating a file is attached. Click **View** or change the database view to **Full View** to access the attachment.

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### Sorting References

**Sort** the references in your RefWorks database by primary author, publication year, title, and more by using the drop-down menu labeled **Sort by** near the top right of the database display.

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### Sharing References (“RefShare”)

1. In **Tools**, select **Share References** and choose a **folder** or your **entire database**.
2. Make permission selections.
3. You can email the URL of the shared folder/database from here if desired.

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### Globally Editing Data in Reference Fields

**Global Edit** adds/edits information to any particular field in a *selected group* of references, e.g. when tagging specific citations to a particular project or paper in a User Defined field.

1. **Select** the references you want to edit: specific ones (place a check in the box to the left of each), the page or the entire list (select these options in the **References to Use:** menu, near the top of the RefWorks window).
2. Click **Global Edit** near the top center of the RefWorks window.
3. Select the field you want to edit from the drop-down list.
4. Type the data to add in the field in the box below; use the optional formatting if desired.
5. Select the desired option for handling the field if it **already contains data**.
6. Click **Add** then **OK**. You should see a message indicating the edit was successful.

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### Moving References from RefWorks to EndNote

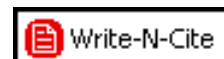
1. Make sure EndNote is not open on your computer.
2. From RefWorks’ **References** menu, select **Import EndNote V8+ Database**.
3. Browse for and select your EndNote library (.enl). **Note:** Currently there is a 25 MB import limit on the size your EndNote library. Specify a **folder** to import your records into (optional)
4. Click **Import** at the bottom of the Import window. RefWorks will notify you when the import is complete. Your records should automatically appear in the **Last Imported** folder.

To import EndNote libraries from versions earlier than EndNote 8, see **RefWorks Help**.

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### Downloading Write-N-Cite

1. Select **Write-N-Cite** from the **Tools** drop-down menu at the top of the RefWorks window.
2. Click on **Click Here...** to download the plug-in. (Scroll down for Mac version)
3. Click **Save**, save the file to a location you will remember, and close RefWorks.
4. Click the RefWorks plug-in (**wnc3inst.exe**) to install. If asked to restart your computer, click **OK**.
5. After the computer restarts, open Word (or close and re-open, if Word was open already during the install) and you will see the red **Write-N-Cite button** on the toolbar:



### **Using Write-N-Cite with Microsoft Word**

1. Launch **Write-N-Cite** by clicking on the **Write-N-Cite** icon on the Word toolbar. You may then need to log on using your RefWorks logon to access Write-N-Cite
  - ✓ At the top of the Write-N-Cite window, you should see the name of your Word document. *It is best to have only the one Word document you are working on open.*
2. To add a citation to your document, click **Cite** next to the reference in the Write-N-Cite window.
3. When finished adding citations, go to Write-N-Cite and click **Bibliography** (near the top).
4. Choose the desired **Output Style**.
  - ✓ If the desired Output Style is not on this list, go to your RefWorks database window and select **Tools > Output Style Manager**. Select the desired style(s) on the left pane and add to your “**Favorites**” on the right pane.
5. Click **Create Bibliography**. You will see a message: *Your document has been processed in [output style name] style with no errors.*
  - ✓ Wait until you see this message before viewing your Word document. Your document will now be formatted in the desired style.
6. To edit citations once you have saved the Word document, such as rearranging their location within your document, **unformat** the citations first:
  - ✓ In Write-N-Cite, go to **Tools > Display Unformatted Citations**
  - ✓ Use cut/paste in Word to relocate citations, or delete citations using the backspace key in Word, then repeat steps 4-6 above

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### **Using RefMobile**

Go to [www.refworks.com/mobile](http://www.refworks.com/mobile) on any web-connected mobile device. You will have access to all your folders and references. Use **Smart Add** to add a reference to your database with a quick search and one click. RefMobile requires you to log in with the UC Berkeley **Group Code**, found at <http://sunsite3.berkeley.edu/BIOS/refworks/groupcode.html> (CalNet authentication required)

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### **RefWorks Help**

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*Includes handouts/exercise sets from classes and **NEW** tutorials on importing citations*

#### **RefWorks Quick Start Guide**

[http://www.refworks.com/Refworks/help/RefWorks\\_Quick\\_Start\\_Guide.pdf](http://www.refworks.com/Refworks/help/RefWorks_Quick_Start_Guide.pdf)

#### **RefWorks Online Tutorials**

In RefWorks, go to Help > Tutorial > and choose the tutorial you wish to view.

#### **RefWorks Online Help**

<http://www.refworks.com/Refworks/help/Refworks.htm#>