

Exercise #1: Create an EndNote Library and Manually Add References

1. Open EndNote X2.
2. Select - **Create a new EndNote library.** (From EndNote's **File** menu, choose **New.**)
3. Name and save the new library on your **Desktop.**
4. Manually enter a citation for a book into your EndNote library. From the **References** menu, choose **New Reference.**

The default for a new reference type is **Journal Article.** Use the drop-down menu to see the entire list. The fields will vary, depending upon the reference type you choose.

5. Choose Reference Type: **Book.** Use this information:

Author: Kaukiainen, Anneli

You can enter author names as **First Middle Last** or **Last, First Middle.** Multiple authors should be entered on separate lines. Use **Enter** to get to the next line of the field, **Tab** to get to the next field.

Year: 2000
Title: Promotion of the health of construction workers
City: Helsinki
Publisher: Finnish Institute of Occupational Health
Number of pages: 85

6. **Save** this reference by closing the window. You will now see the reference highlighted in your library.

Manually Enter a Web Page Citation

1. From the **References** menu, choose **New Reference.**
2. Choose Reference Type: **Web Page.**

Author: National Institute for Occupational Safety and Health,
(continued on the back)

Make sure you add the comma to the end of the corporate author names.

Year: 2008
Title: Essential Elements of Effective Workplace Programs and Policies
for Improving Worker Health and Wellbeing
Access Date: 04/07/2009
URL: <http://www.cdc.gov/niosh/worklife/essentials.html>

NOTE: You do not need to enter information in every field in the EndNote record.

3. Close the reference window to save the information.

Manually Enter a Journal Article Citation - OPTIONAL EXERCISE

1. From the **References** menu, choose **New Reference**.
2. Choose Reference Type: **Journal Article**.
3. Use this information:

Author: Aldana, SG
Greenlaw, RL

Use the Enter key to place each author's name on a separate line.
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Year: 2005
Title: Effects of a worksite chronic disease prevention program
Journal: Journal of Occupational and Environmental Medicine
Volume: 47
Issue: 6
Pages: 558-64

4. Close the reference window to save the information.

Exercise #2: Importing Citations Into Your EndNote Library and Finding Full Text

PubMed

1. Open up the web browser and go to the **PubMed for UCB**:
<http://uclibs.org/PID/17708>
2. Type "**chronic disease prevention**" **AND** **nutrition** into the search box and click **Go**.
3. Choose some citations (about 5 or so) by clicking in the box to the left of the citation number.
4. Use the drop-down menu to the right of the **Display** button to choose **MEDLINE**. Use the **Send to** menu to send the results to **File**.
5. **Save** and **name** the file. Keep the file suffix **.txt**. **Save** to your desktop.
6. Go back to **EndNote**. Make sure your library is open.
7. Choose **Import** from the **File** menu.
8. Next to **Import Data File**: click on the **Choose File** button to choose the text file you have just saved to the desktop. **Select** the file and click **OK**.
9. Click on the down arrow to choose **PubMed (NLM)** as the **Import Option**. If it is not listed, choose **Other Filters...** and choose the **PubMed (NLM)** filter.
10. Leave the **Duplicates** options as **Import All**.
11. Ignore the **Text Translation** box.
12. Click the **Import** button.

The references showing are the ones you have just imported. Note the message at the bottom of the library window saying, "Showing **x** out of **x** references in Group. All references: **y**"

Finding Full Text for Your References

13. Select all the references by holding the **Shift key** down and clicking on the **first then last** reference.

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14. Under **References** menu, select **Find Full Text**.
15. Click on **Continue**.
16. In the **Groups** window, you now see **Full Text (#)**. Full text was found for the highlighted references.
17. Click on **All References** from the **Groups** window to see your entire library.

Google Scholar - OPTIONAL EXERCISE

1. Go to Google Scholar - <http://scholar.google.com>
2. Click on **Scholar Preferences**
3. In the **Library Links** box, type **university of california berkeley**
4. Click on **Find Library**.
5. Click in the box next to **University of California Berkeley - UC-eLinks**
6. Scroll down to **Bibliography Manager**, select **Show links to import citations into** and choose **EndNote** in the drop down box.
7. Click on the **Save Preferences** button.
8. Type **obesity prevention workplace** into the search box and click **Search**.
9. Choose a citation and import it into EndNote by clicking on **Import into EndNote**. Choose about 3 or so more and import them into EndNote. Include some non-article citations.
10. Select **your library** to save the citations into. You may need to select **Open With EndNote.exe** to download citations into your EndNote library from Firefox.
11. Check the citations as they import to make sure they import correctly. Edit as necessary since not all information is imported into EndNote.

<p>If you use Firefox and Zotero is also loaded, you need to disable Zotero by going to Tools, Add-ons, Extensions, Disable Zotero and then restart Firefox to be able to import Google Scholar citations directly into EndNoteX2.</p>
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Exercise #3: Sorting References, Changing Display Fields, Creating Groups, and Linking Files

Sorting References and Changing Display Fields

1. Open the Library that you saved onto your **Desktop** in Exercise #1. If it is not already open, go to **File** and then **Open**.
2. Click on **All References** from the **Groups** window to see your entire library
3. Click on the field names at the top of the columns (**Author, Title...**) to change the sort order.
4. To change the display fields:
 - a. Under the **Edit** menu, choose **Preferences**.
 - b. Click on **Display Fields**.
 - c. Using the drop-down menu, change the Field in Column 1 to "**Reference Type**"
You can change the Heading text to display what text you would like.
 - d. Click on **OK**. You should now see the new display field.

Creating a Custom Group

1. Under the **Groups** menu, select **Create Group**.
2. **Name** the group and press **Enter**.
3. Click on the **All References** group.
4. Click on a reference you would like to add to the group. Holding the mouse button down, drag the reference to your new group.
5. Click on your group name in the Groups column to see the references you have in your group.
6. To remove a reference from a group, click on the **reference** and then hit the **Delete** key OR under the **Reference** menu select **Remove References from Group**.

Linking Files

1. Open up **Word** and create a new document.
2. Type "**My test document**" into it.
3. **Save** the document to your desktop. Call the document anything you wish. (**NOTE:** you will use this document in Exercise #4).

4. Go to your **EndNote** Library.
5. Click on a reference.
6. Under the **References** menu, select **File Attachments – Attach File ...**
7. Use the dialog box to locate and select the file you just created. To create a **file link**, **uncheck** the box next to: **Copy this file to the default file attachment folder and create a relative link**. If you do **NOT** uncheck this box the file will be **added** to your EndNote library.
8. Click **Open**.
9. **Double click on the reference** you added the file to.
10. Scroll down to the **File Attachment field** and you should see an icon. When you mouse over the icon, you should see the file pathname to that document appear.
11. To open the linked document, double click on it.
12. Close the reference window.

Creating a Smart Group - OPTIONAL EXERCISE

1. Under the **Groups** menu, select **Create Smart Group**
2. Change **Any Field** to **Year**.
3. Leave **Contains**.
4. Type **2008** in the search box.
5. Click on **Create**.
6. Click on the **Smart Group name**.
7. Under the **Groups** menu, select **Rename Group**
8. Type the **new name** and press **Enter**.
9. Next to the name is the number of references that match your search criteria.

Exercise #4: Using Cite-While-You-Write

1. Open your EndNote library – the one you created in Exercise #1.
2. Open the Word document you made in Exercise #3.
3. Start typing in the Word document – anything you wish.
4. To add a citation, go to **Tools** (in Word) - **EndNote X2 - Find Citation(s)**.
5. Enter a keyword into the search box to lead you to one of your saved citations. You can always enter 'a' to get a list of all your citations.
6. Double click on a citation to add it.
NOTE: This may take some time the first time you add a citation. It will be added in the style indicated in the drop-down list near the top of the EndNote window.
7. Type some more and **add 2 citations** to the same new sentence.
8. Continue writing a few more sentences and add about 2 more citations.
9. To change a citation, go to your citation and click on it.
 - a. Go to **Tools - EndNote X2 - Edit Citation(s)**.
 - b. Click on **Insert**. Find the citation you want to add. Click on the **citation** and then click on **Insert**.
 - c. Click on the **citation** you want to delete then click on **Remove**.
 - d. Click **OK**.
10. Change the bibliographic style of your manuscript.
 - a. In Word, go to **Tools - EndNote X2 - Format Bibliography**.
 - b. Next to **With output style**, click on **Browse**.
 - c. Select **JAMA** as your new style.
 - d. Click **OK**.
 - e. Click **OK**.
11. Move your sentences around. Your citations should reformat by themselves. If they don't, go to **Tools - EndNote X2 - Format Bibliography** and click on **OK**.