

Introduction to EndNote X2
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Manually Adding References to Your EndNote Library

1. Open EndNote.
2. Open an existing Library or create a new Library.
3. From **References**, select **New Reference**.
4. Change the **Reference Type** if the item you are entering is different from the default Reference Type (usually Journal Article).
5. Type the appropriate information into each field.
 - a. Author names should be entered one author per line, last name followed by a comma, then first name.
 - b. If the author is a corporate entity, put a comma after the name
 - E.g. Centers for Disease Control and Prevention,
 - c. Use complete, not abbreviated, journal titles.

Importing PubMed Records into EndNote

Saving your citations from PubMed:

1. Search PubMed using the PubMed for UCB URL: **<http://uclibs.org/PID/17708>**
2. Select the citations you wish to save by checking the box to the left of each.
3. After all the citations you wish to save have been selected, change the drop down box next to Display to **MEDLINE**.
4. Select **File** from the "Send to" drop down menu.
5. **Save** the file. Change the name and location of the file to something you will remember. Keep the file suffix ".txt" and make sure the "Save as type" is **Text Document**.

Importing your PubMed records:

1. Open EndNote.
2. Open an existing Library or create a new Library.
3. Under the File menu, choose **Import**.
4. Next to Import Data File, click on **Choose File**. Find the file you saved above from your PubMed search; click on **Open**.
5. Next to Import Option, click on the down arrow and look at the pull down menu. Highlight **PubMed (NLM)** if it is listed. If not, select **Other Filters**. A window will pop open called Choose An Import Filter. Scroll down and highlight **PubMed (NLM)**. Click on **Choose**. **NOTE:** You may need to download the latest PubMed (NLM) filter (5/14/08) filter before you import if you installed EndNote prior to the latest filter date. See below for more information on importing filters.
6. Leave Duplicates at Import All.
7. Ignore Text Translation. This option allows for translations of extra characters from other languages.
8. Click on **Import**.
9. Review your imported citations to make sure they imported correctly. If not, it may be an indication that you need a filter update.

Importing Google Scholar Records into EndNote

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. Search for the citations you want to import.
 9. Under the citation you would like to import it into EndNote, click on **Import into EndNote**.
 10. Select **your library** to save the citations into.
 11. Check the citations as they import to make sure they import correctly. Edit as necessary since not all information imports.
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Finding and Retrieving Full Text

To retrieve full text articles from UCB or UC licensed resources from an off-campus location, you need to be logged into the campus VPN. Links to the full text are put into the File Attachments field and the full text files are saved to the DATA folder.

1. Select the reference(s) you want to find full text for.
2. Under the **References** menu, choose **Find Full Text**.
3. Click on **OK**.
4. In the **Groups** window, you now see **Full Text (#)**. Full text was found for the highlighted references.

NOTE: Occasionally, full text may not be found even though UCB or UC has licensed access to the item.

Adding/Modifying EndNote Display Fields

1. Under the **Edit** menu, choose **Preferences**.
 2. Click on **Display Fields**.
 3. Use the drop down menus to add/change the field display in your EndNote library. Up to 8 fields can be displayed. The Headings field text is what will display in your window. This text can be modified.
 4. Click **OK**.
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Creating a Custom or Smart Group

You can group references together by creating a custom or smart group. References must be manually added to a custom group; whereas, references are automatically added to a smart group according to the search criteria you set up.

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.

Smart Group

1. Under the **Groups** menu, select **Create Smart Group**
2. Designate the search criteria for the group.
3. Click on **Create**.

4. Click on the Smart Group name.
 5. Under the **Groups** menu, select **Rename Group**
 6. Type the new name and press **Enter**.
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Linking a File to an EndNote Reference

You can link a file (image, a word processing document, a PDF file, spreadsheet, etc.) on your computer to an EndNote reference.

1. Click on a reference in your library.
2. Under the **References** menu, select **File Attachments – Attach File ...**
3. Use the dialog box to locate and select a file that you would like linked 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**. If you do **NOT** uncheck this box the file will be **added** to your EndNote library.
4. Click **Open**.
5. Open the reference and scroll down to File Attachment to check that the file was linked. When you mouse over the icon, you should see a file pathname. EndNote will display an icon indicating the type of file inserted. You can insert up to 45 files into the same File Attachments field.

Note: Another way to link a file to the File Attachments field is to *drag and drop* the file to the reference in either the Library window or the Reference window. Whether the file is saved with the database or is linked with an absolute path is determined by the **default file attachment setting** in **Preferences URLs & Links** under the **Edit** menu.

Adding the PMC number to your EndNote Library

When submitting a grant to NIH, the PMC number is required for all references. Perform the following steps to add the PMC number to your EndNote Library. Do **NOT** perform these steps if you are using the Custom 2 field to hold your own notes. First move the contents of the Custom 2 field to another Custom field.

1. Go to: **c**
2. **Save** the file.
3. Double-click on the folder and **extract all files**.
4. Closed the zipped folder.
5. Open EndNote X2 and your library.
6. Go to **Edit**, select **Preferences**.
7. Click on **Reference Type**, select **Import**.
8. Select the "**Pubmed_PMCID-X2.xml**" file and click **Open**.
9. Click on **Apply** then **OK**.
10. From the NIH folder, double-click on **NIH.ens** to open it.
11. In EndNote X2, go to the **File Menu** and choose **Save as**.
12. Change the file name from **NIH Copy** to **NIH**
13. Click **Save**.
14. Close the window.
15. From the NIH folder, double-click on the **PubMed (NLM).enz** to open it.
16. In EndNote X2, go to the **File Menu** and choose **Save as**
17. Change the file name from **PubMed (NLM) Copy** to **PubMed (NLM)**
18. Click **Save**.
19. Close the window.
20. From the NIH folder, double-click on the **PubMed (NLM).enf** to open it.
21. In EndNote X2, click on **Templates**.
22. Scroll down to the tag: **PMC -**.

23. In the fields column change **PMC{IGNORE}** to **PMCPMCIID**
 24. Go to the **File Menu** and choose **Save as**.
 25. Change the file name from **PubMed (NLM) Copy** to **PubMed (NLM)**.
 26. Click **Save**.
 27. Close the window.
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Using a Custom Field

You may wish to use a custom field if, for example, you wish to add your own subject terms to the references in EndNote, or tag citations that are related to specific projects or papers.

1. Under the **Edit** menu, choose **Preferences**
 2. Click on **Reference Types**
 3. Click on **Modify Reference Types**
 4. Scroll down to the **Custom 1** field, and enter the name of the new field (e.g. "Project") in the box to the right.
 5. Click on the **Apply to All Ref Types**. Click **OK**, then **OK** again. If you want the contents of this field to display in your Library display, see "**Adding/Modifying EndNote Display Fields**" above.
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Moving Contents from One Field to Another

1. Under the **Tools** menu, choose **Change and Move Fields**
 2. Click on **Move Fields** tab
 3. In the From: choose the field name of the contents you want to move.
 4. In the To: choose the new field you want to move the contents to.
 5. Select the appropriate choice insertion.
 6. Click **OK**, **OK**, then **OK** again.
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To Make a Change in More Than One Record at the Same 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. Click **OK**, then **OK**, then **OK**
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Copying or Moving Citations from One EndNote Library to Another EndNote Library

Method 1: Copy/Cut and Paste Single Citations

1. Open 2 EndNote libraries
2. Select the citation, under **Edit** menu - **Copy** or **Cut**
3. Click on 2nd EndNote library, under **Edit** menu - **Paste**

Method 2: Drag and Drop Citations

1. Open 2 EndNote libraries
 2. Select the citation(s) you want to move and drag them from one library into the other library window
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Using UC-eLinks with EndNote X2

You can enable EndNote X2 to link to the UC-eLinks server, which will provide all UC-eLinks services including full text access (when available) to all your citations in your EndNote library. **NOTE:** These instructions are modified from: http://www.lib.berkeley.edu/BIOS/end_uc-elinks.html

1. To enter the UC-eLinks server information into EndNote X2, open EndNote and select **Preferences** under the **Edit** menu.
2. In Preferences, select **URLs & Links** and then **check Enable Open URL**. Delete the existing OpenURL Path and type in the following: **http://ucelinks.cdlib.org:8888/sfx_local**
3. In the Arguments box, replace "WoS" with "**EndNote**" so that the argument is:

?sid=ISI:EndNote&aufirst=AUFIRST&aulast=AULAST&issn=ISSN&isbn=ISBN&atitle=ATITLE&title=TITLE&volume=VOLUME&issue=ISSUE&date=DATE&spage=SPAGE&epage=EPAGE

4. Leave checked "Copy new file attachments to the default file attachment folder and create a relative link."
5. Click on **Apply** then **OK**.
6. To use the UC-eLinks, **select a reference** in your library.
7. Under the **References** menu, choose **URL - OpenURL Link**. A UC-eLinks window will open with your citation and full text retrieval options.

Backing up Your EndNote Library

It's a good idea to make a backup copy of your EndNote library and the associated DATA folder.

1. Open EndNote.
2. Click on **Save a Copy** under the **File** menu.
3. Choose a location to save a copy of your library.
4. Rename the copy if desired. The default name is **[Libraryname] Copy**.
5. Click on **Save**.

Using Cite-While-You-Write: The Basics

Adding citations to your Word document:

1. Type your document.
2. When you get to a place where you want to add a citation, go to **Tools** (in Word) - **EndNote X2 - Find Citation(s)**.
3. Search for and find the citation you wish to insert, and **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 X2 - 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 for publication:

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

1. Save a copy of your document.

2. Go to **Tools - EndNote X2 – Remove Field Codes**. Once you remove the field codes you can **NOT** go back to add/modify/delete citations and reformat the bibliography; this is why you make a copy of your document **BEFORE** you remove the field codes.
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Manuscript Templates

You can create a Microsoft Word document using a predefined manuscript template.

1. Open EndNote
 2. From the **Tools** menu, select **Manuscript Templates**
 3. The Templates folder should automatically open. **Select and open** the template named for a particular editorial style guide or the journal to which you intend to submit your manuscript.
 4. A new document will now open in Word that is based on the template file, and a manuscript template wizard will guide you through the process of writing your paper.
 5. **NOTE:** The first time you launch the manuscript template wizard, you may be asked about macros. **Enable macros** to continue.
 6. 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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Other EndNote Information

EndNote Import Filters

As database fields change or information providers obtain new databases, you may need to download a new import filter. This will ensure that citations are imported correctly into your library.

Downloading new import filters:

1. Open a web browser.
2. Go to: <http://www.endnote.com/support/enfilters.asp>
3. Find the filter you want and click on **Download**.
4. When the "Save As..." window opens, save the "**xxxx.enf**" file in the C:\Program Files\EndNote X2\Filters or to the location of the EndNote X2 program Filter folder.
5. Close your browser.

Output Styles Provided with EndNote

If you are writing a manuscript and wish to utilize citations from your EndNote library, EndNote can help you create your bibliography in various style formats. You may need to download a new output style if it is not one of the hundreds already available in your version of EndNote. Also, like import filters, output styles may change with time.

Downloading new output styles:

1. Open a web browser.
2. Go to: <http://www.endnote.com/support/enstyles.asp>
3. Find the style you want and click on **Download**.
4. When the "Save As..." window opens, save the "**xxxx.ens**" in the C:\Program Files\EndNote X2\Styles or to the location of the EndNote X2 program Style folder.
5. Close your browser.

EndNote Help and Tutorials (UCB Library)

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

EndNote Tip Sheets (for all versions) (ISI ResearchSoft)

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

EndNote FAQs (ISI ResearchSoft)

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

EndNote Discussion List – Searchable Archives (Adept Scientific)

<http://lists.adeptscience.co.uk/endnote/>