

# EndNote X7

## Citation and Reference Management

2015

UC Libraries EndNote Website  
<http://guides.libraries.uc.edu/EndNote>

Randall L. Roberts  
[randall.roberts@uc.edu](mailto:randall.roberts@uc.edu)  
513-556-1864  
University of Cincinnati Libraries

# EndNote X7

## Workbook

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EndNote provides a comprehensive users guide. To open the *EndNote X7 User Guide*, open Windows Explorer, go to “Programs Files” on your [C] drive and then find and click on the EndNoteX7 folder. Double click on the **EndNoteX7WinHelp** file to open the *User Guide*.

Many of the exercises in this workbook use files from the UC Langsam Libraries’ electronic classrooms. These same files are embedded in the electronic version of this workbook and these files are placed proximate to the exercise for which they are needed.

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**Randall L. Roberts**

**randall.roberts@uc.edu ---- (513) 556-1864**

**Research, Teaching & Services Department**

**University of Cincinnati Libraries**

**Cincinnati, OH 45221**

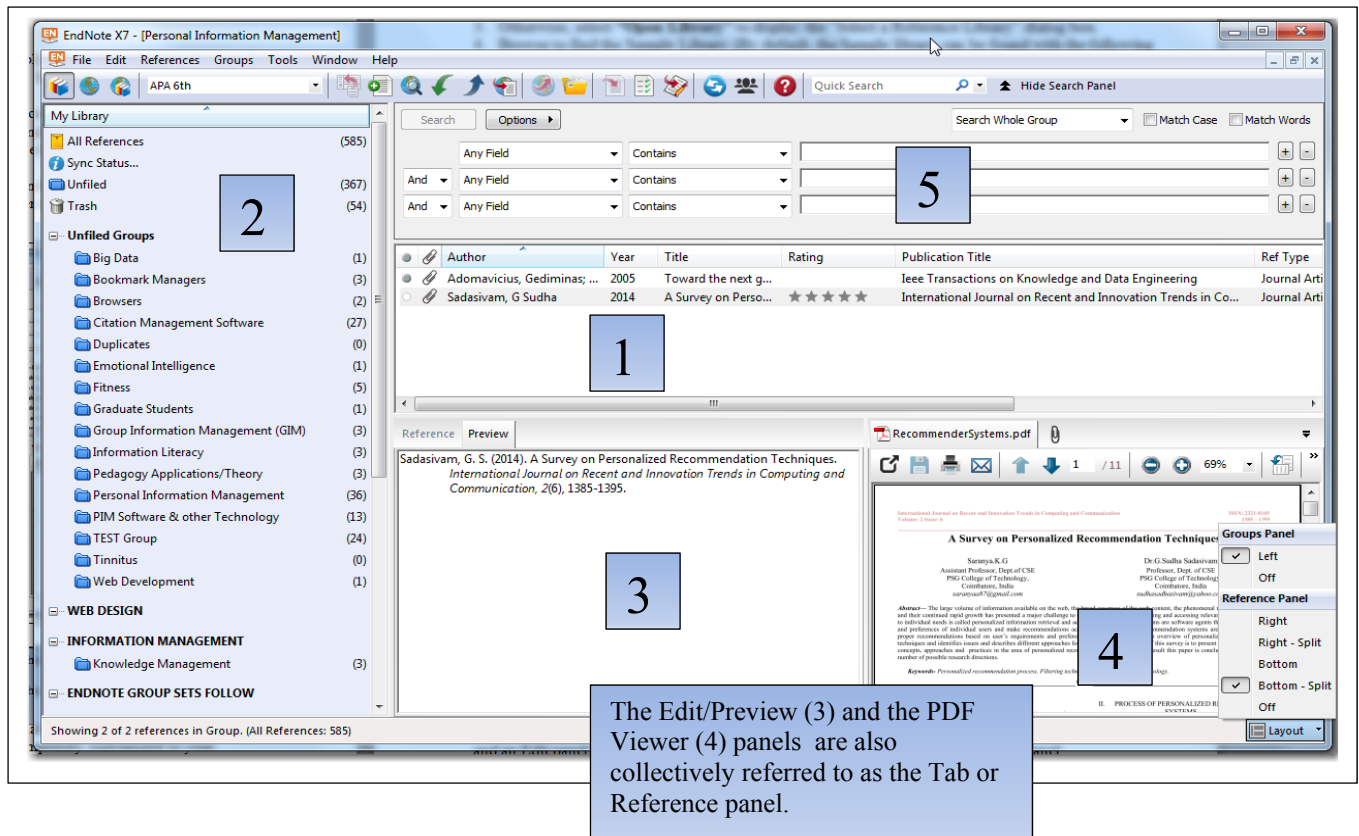
**[EndNote UC Libraries' Web Pages](#)**

# The EndNote Library

## The Library Window

The EndNote Library Window (see below) offers an incredibly diverse and functional array of individual panels. It is possible to open and resize anywhere from 1 to 5 panels:

1. Reference List panel – highly configurable window for displaying and sorting references
2. Groups panel – collapsible panel displays EndNote and user created groups
3. Edit/Preview panel – collapsible panel used to edit the highlighted reference or to preview the reference in any of over 5,000 output styles
4. PDF Viewer panel – collapsible panel used to view and edit attached PDFs
5. Search panel – collapsible panel used to search references



## Reference Panel

The **Reference panel** (above) displays the references in your database in single line format with up to 10 columns (all sortable) of information. This panel can be completely customized to your preferences, including number of displayable columns, arrangement of columns, information in columns, font size and style and size of the panel.

### EXERCISE (Open the Sample Library)

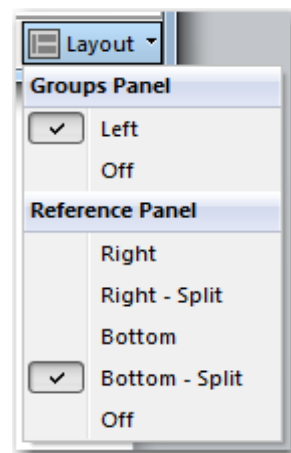
1. Select **File** from the EndNote menu bar, and then select **“Open.”**
2. Previously opened libraries will be displayed below the “Open Library” command. If your library is listed, select it.
3. Otherwise, select **“Open Library”** to display the “Select a Reference Library” dialog box.
4. Browse to find the Sample Library (By default, the Sample library can be found with the following path: C:// ... Program Files/EndNoteX7/Examples.
5. Double click on the “Examples” folder short cut and then select the Sample library (Sample\_Library.enl) and click on **[Open]**.

**TIP:** Adding Record Number to the Library display window provides a clear picture of the sequential nature of the references added to your library/database. This can be a very useful tool for identifying recent additions to your Library even “after” references have been sorted in any number of ways.

### EXERCISE (Add “Record Number” to the Reference panel)

1. Select **Edit** from the EndNote menu bar, and then select **“Preferences”** and then **“Display Fields.”**
2. Change “Last Updated” in Column 10 to be “Record Number” and then modify the corresponding Heading to **“Record #”**.
3. Click on **[OK]** to confirm.

**NOTE:** To view all 10 columns of information in the Reference List panel you may need to move the Reference panel to the bottom of the window via the Layout options. The “Bottom – Split” option enables the viewing of both the Edit/Preview and the PDF viewer panel for references with attached PDFs.



### Groups Panel

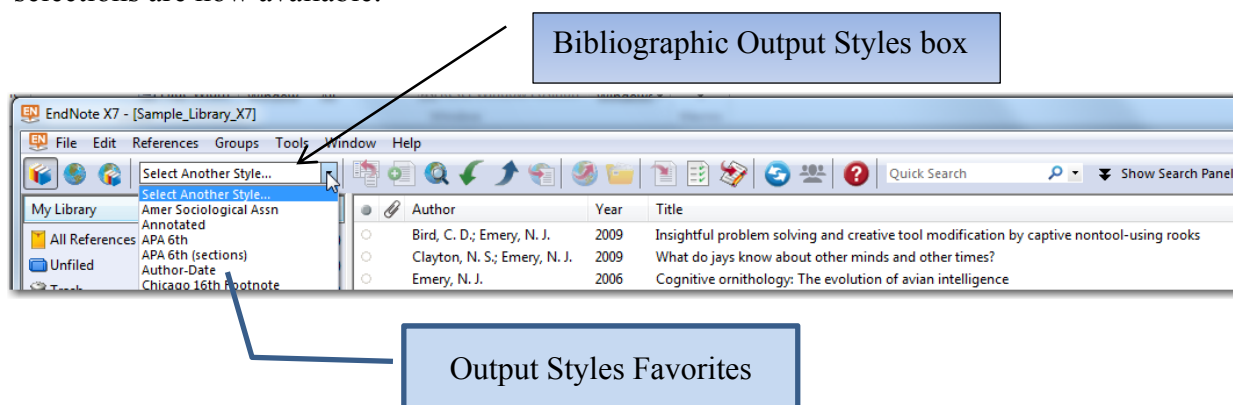
The **Groups panel** (see #2 graphic on previous page) occupies the left side of the Library Window, and it includes a wide range of standard (default) and customized groups to enhance the organization and finding capabilities of your database.

### Edit/Preview Panel

The **Edit/Preview panel** (see #3 graphic on previous page) is bifunctional and may occupy either the bottom or the right side of the Library Window. This panel provides two functionalities: a preview panel to preview any highlighted reference in the Reference panel in any of over 5,000 output styles, and an Edit panel in which you can edit any highlighted reference in the Reference panel.

## EXERCISE (Add the following output styles -- APA, Lancet & MLA -- to the favorites list for use with the Preview panel)

1. Click on the down arrow to the right of the “Bibliographic Output Style” box to invoke a “drop down” menu.
2. Click on “Select Another Style ...”
3. Find and select the output style you need by entering it in the **Quick Search** box.
4. Enter “apa” into the search box and press **[Enter]**.
5. Highlight “**APA 6<sup>th</sup>**,” and then click on the [Choose] button to make APA 6<sup>th</sup> a favorite.
6. Make favorites of the *Lancet* and *MLA* output styles by repeating steps 2 – 5.
7. Click on the down arrow of the “Bibliographic Output Styles” box to confirm all of your new selections are now available.



**TIP:** EndNote offers over 6,000 output styles. If the style you need is not displaying in the Output Styles favorites window (see graphic above), use the process in the above exercise to add the styles you require. If the style you require is not among those listed in the “Choose a Style” dialog box, click on the [EndNote Output Styles](#) link to access all 6,000 styles to download the style you need. Instructions for downloading a style are included on the [EndNote Output Styles](#) website.

## Creating Libraries

EndNote recommends you create no more than one library because of the difficulties of maintaining and working with two libraries that may contain overlapping data. References in the single library may be organized through use of the **Groups** feature.

**To create an EndNote library/database**, select **File** from the menu bar and then select “New.” Name your library and click on “Save.” EndNote will automatically add the file extension “.enl,” and will also automatically create a folder “.Data” with the same name as your library. The “.Data” folder will contain database settings, and (if you added any of the following) figures, tables and full text articles. In the exercise below the library you create will have an “.enl” library file and a “.Data” folder and will appear as follows:

*MyFirst.enl* -- File name with extension  
*MyFirst.data* -- automatically created Folder

### **EXERCISE (Create a library called “MyFirst”)**

1. Select **File** from EndNote menu bar, and then select “**New.**”
2. For this exercise in the UC Libraries classrooms the path is “**C:// ...Desktop/Roberts/EndNote**”
3. Enter “**MyFirst**” into the “File name:” box and click on the [**Save**] button.
4. Your “MyFirst” library will appear as an empty EndNote library with zero references.

**TIP: EndNote’s Sample library is located in EndNote’s “Examples” folder. However, you can place your personal EndNote library in any folder (location) of your choosing. It is probably a prudent idea to place your library in a folder that is regularly and automatically “backed up.” For example, you may want to go to MyDocuments and create a folder called “EndNoteLibraries.”**

### **Saving a Copy of a Library**

There is normally no need to “save” a copy of a library. EndNote libraries/databases are automatically saved when you close them. However, you should “always” back up your libraries, including both the “.enl” file and the “.Data” folder for each EndNote library. See the next section on “*Saving a “compressed” copy of a library.*”

### **Saving a “compressed” copy of a library**

Use the Compressed Library command, available under **File** on the menu bar, to save a compressed copy of both your library file and the associated “.Data” folder (including all of its configuration settings and also full text articles if preferences are set to set to copy full text as a relative link). This is also a time and space saving way to back up your EndNote library, its settings and full text articles.

### **Opening a Library**

To open a library/database select **File** from the menu bar, select “Open” and then either click on the name of the library or click on “Open Library” and look for your library.

### **Closing a Library**

To close a library/database, simply close the library window. All changes will be saved automatically.

### **Deleting a Library**

You can delete a library/database by deleting both the “.enl” file and the “.data” folder through the operating system, e.g. Windows. You also can delete these same two files from within EndNote by selecting **File** from the menu bar then select “**Open,**” then select “**Open Library**” and then finding and deleting both the “.enl” file and the “.data” folder.

# Entering Records into an EndNote Library – Overview

EndNote provides a variety of mechanisms for adding references into your EndNote library. The five most commonly used mechanisms (listed in order of popularity) are direct export of references from research literature databases, manual reference entry, importing references from PDF files, importing references from research literature databases, and the Z39.50 utility (EndNote online search).

Usually the most efficient method for adding new references to your database, particularly for multiple records, is the direct export of references from a database. However, circumstances may often dictate the method available to you. All five mechanisms are described below. Furthermore, exercises for all five methods are included in this workbook.

## Exporting references directly from a research literature database

Exporting is the quickest and most convenient method for adding multiple references to your EndNote library. You search your favorite databases, e.g., Medline, PsycINFO, or SocINDEX, and directly export your selected references directly to EndNote without ever leaving the database.

## Manual Record Entry

Sometimes keying in individual references is necessary. For example, some of your references may not come from a database source, or your references may come from a database with no export or import options. In any case, you will have occasions where entering the reference manually is your most convenient option or your only option.

## Importing saved references from a research literature database

Some databases do not offer the export feature. For these databases, references must be saved as a text file (.txt file) and then imported (uploaded) into EndNote as a separate operation. This process is nearly as fast as exporting, is much faster than manual inputting of references and has the advantage of passing all the imported references through EndNote's duplication filter.

## Importing references from PDF files

This exciting new utility enables the creation of new EndNote references from either a collection of PDF files in a folder or from a single PDF file. EndNote extracts DOI (digital object identifier) information from the PDF and matches that information with data available from the CrossRef.org database to capture the bibliographic content to create the EndNote references, saving you the typing time. One other thing – EndNote automatically attaches the PDF to the EndNote reference.

## EndNote Online Search using Connection Files to access Databases

From within EndNote you can seamlessly connect to public library catalogs (e.g., the UC library catalog or the OhioLINK library catalog) or public databases (e.g., PubMed). This process is just as efficient as the export process for electronically importing references into your library.

**TIP: References from other personal bibliographic management programs, e.g. RefWorks, Zotero or Mendeley can be easily imported into EndNote.**

## Exporting References Directly into EndNote

The direct export option is available from most major research literature databases. The process for most databases involves four generic steps and is relatively easy. Though the “look” and terminology may vary depending on the database interface, most databases utilize the same four steps:

- 1. Open a database, conduct a search and retrieve some records.**
- 2. Select, save, store or mark the records you want to export.**
- 3. Go to the place where the selected or marked records are saved or stored.**
- 4. Look for the word “export,” and then select “EndNote” as the export format or source.**

Some databases do not offer the export option. For these databases you will likely have to “import” the records into EndNote. An explanation of the import process and corresponding exercises can be found in the section on [Importing Saved References](#).

The exercises on the following pages demonstrate how to enter a search, retrieve and select records and export records to EndNote. These exercises are conducted in seven different databases. However, many of these databases share an interface with dozens of other databases. That is, dozens of databases may have totally different content, but they share the same interface or “look,” and all databases that share a common interface “export” records identically. Therefore, by practicing and learning how to export records from one of the databases in the following exercises you will acquire the skill set needed to export records from dozens of other databases that use the same interface, and any one of these “related” databases may be one of the databases that is a primary database in your discipline.

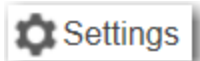
### EndNote direct export exercises in this workbook

Database Name	Brief Description	Interface name & number of databases sharing the interface
Google Scholar	Very large multidisciplinary Internet search engine that indexes a wide range of resources	Google (1)
ProQuest Criminal Justice	Specialized database for the criminal justice literature	ProQuest (49)
PsycINFO	Specialized database of the psychology literature	EbscoHost (100)
Scopus	Large database of the science, social science and (to a limited extent) humanities journal literature	Elsevier (1)
Summon	Index to article databases and books, films and other materials in the UC Libraries catalog	N/A
Web of Science	Large database of the science, social science and humanities journal literature	ISI (3)
WorldCat	Worldwide catalog of books and other materials	OCLC (19)

## **EXERCISE   [Google Scholar](#) — Interface: Google**

Exporting records from Google Scholar requires the setup of Google’s “Bibliography Manager.” **Records imported with the Google Scholar Bibliography Manager are imported one at a time.** If these references contain bibliographic data, this information will usually populate the EndNote fields. However, sometimes some information is missing from the Google record, and you may need to supply the missing information.

1. Make sure cookies are enabled in your browser to allow setting of preferences in Google Scholar.
2. Go to the Google Scholar search screen (<http://scholar.google.com> ) and then click on.



3. At the bottom of the screen and next to “Bibliography Manager” click on the radio button for “**Show links to import citations into,**” and then select **EndNote**.
4. Click on **[Save]**.
5. Now when you conduct a search in Google Scholar the results at the list level will display an “Import into EndNote” link.

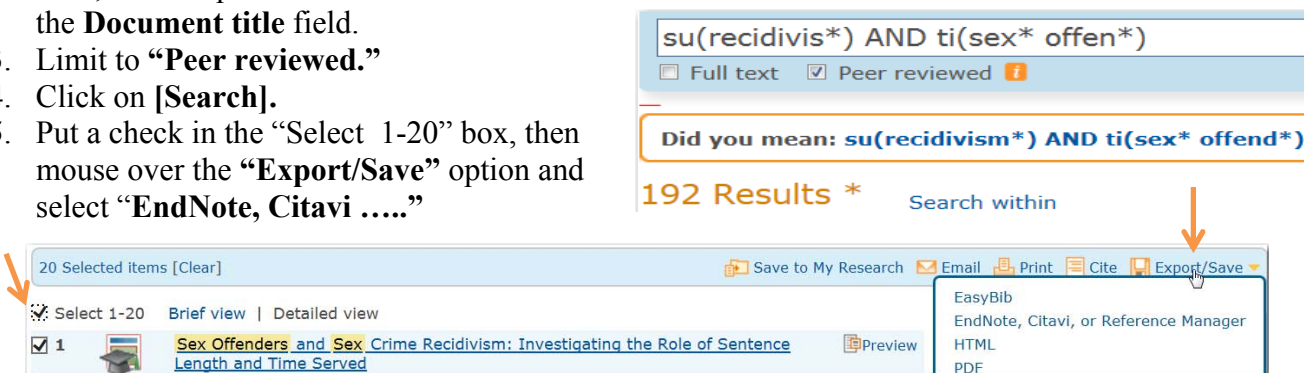
## **EXERCISE   (Searching and exporting from Google Scholar)**

1. Connect to Google Scholar (<http://scholar.google.com> ).
2. Enter the following search: “*cognitive style*” *personality*.
3. Select any Google reference from the retrieved list, and then click on the “Import into EndNote.” If this option is not displayed, click on the “More” option to invoke its appearance, and then click on “Import into EndNote.”
4. This will open a “File Download” box with 3 options: [Open], [Save] or [Cancel]; select **[Open]**.
5. The new reference will import into your EndNote library in the “Imported References” group.
6. Check the reference for incomplete information. If necessary, edit the reference or store it for later editing.

**TIP:** The “Import into EndNote” option will display “only” if you enabled the “Bibliography Manager” in Google Scholar. (See the exercise at the top of this page.) There are other options for exporting Google Scholar records into EndNote. Clicking on the title link in the Google Scholar list of results may invoke different publisher or vendor web sites (e.g., Science Direct or APA PsycNet) that often include their own bibliography management export tools.



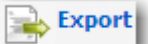

**EXERCISE** ProQuest Criminal Justice — **Vendor: ProQuest** (This database vendor hosts a wide variety of databases in the areas of business and the social sciences as well as the newspaper and dissertation literature.)

1. Open the Criminal Justice Periodicals database.
2. Conduct the following search: enter the term *recidivis\**, limiting to the **Subject heading (all)** field, then drop down to the next line of boxes and enter the expression *sex\* offend\** -- limiting to the **Document title** field.
3. Limit to **“Peer reviewed.”**
4. Click on **[Search]**.
5. Put a check in the “Select 1-20” box, then mouse over the **“Export/Save”** option and select **“EndNote, Citavi .....**”



6. From the **Export /Save** window click on the **[Continue]** button to export records to EndNote. This may open a “File Download” box with 3 options: [Open], [Save] or [Cancel]; select **[Open]**.
7. Records will be exported directly into the library that is currently open and active and will be placed in the “Imported References Group.”
8. Randomly check these references for errors.
  - a. If errors are detected, move the flawed records to another group, e.g., Problem References Group, to edit later.
  - b. Assign the remaining references (usually most or all the records) to an appropriate “Group” or simply allow these references to become part of your library.
9. Optional Global Edit to add valuable metadata:
  - a. Confirm that you are still looking at the “Imported References Group.” Now you will conduct a global edit of your newly imported references.
  - b. Click on **[Tools]** from the Endnote menu bar and then click on **“Change/ Move/Copy Fields.”**
  - c. After **“In:”** select the **“Name of Database”** field, and then select **“Replace whole field with:”**
  - d. Click inside the text box and enter **“ProQuest Criminal Justice,”** and then click on the **[OK]** button.
  - e. Confirm the change by clicking on **[OK]**, and then confirm again by clicking **[OK]** one more time.
  - f. All of these references in the “Imported References Group” now include the name of the database from which they were retrieved. This is useful metadata added to each reference should you ever need to find all or some of the references in your library from this particular database.

## **EXERCISE   PsycINFO — Vendor: EBSCOHost**

1. Open the PsycINFO database.
2. In the first search box enter the expression **(substance OR drug) N4 abuse** (limiting to the **TI Title** field) and then drop down to the next search box and enter the expression ***evaluat\* OR assess\**** (limiting to the **TI Title** field).
3. Confirm that the **AND** operator is the selected Boolean operator between the two search boxes, and limit your search from 2008 to 2015. Then click on the **[Search]** button.
4. Click on the **Share** button and then click on “  **Results (1 – ##)**” to add these references to your EbscoHost folder.
5. Click on the  icon that is located on the Ebsco main menu bar.
6. Check the “**Select/deselect all**” box to select all the records, and then click on .
7. Select  and then click on the **[SAVE]** button.

This may open a “File Download” box with 3 options: [Open], [Save] or [Cancel]; select **[Open]**.

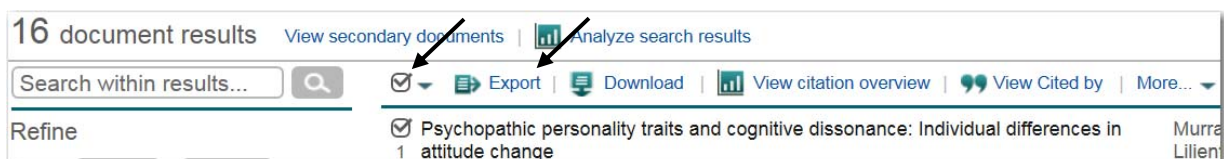
8. Records will be exported directly into the library that is currently open and active and will be placed in the “Imported References Group.”
9. Randomly check these records for errors
  - a. If errors are detected, move the flawed records to another group, e.g., Problem References Group, to edit later.
  - b. Assign the remaining references (usually most or all the records) to an appropriate “Group” or simply allow these references to become part of your library.
10. Optional Global Edit to add valuable metadata:
  - a. Confirm that you are still looking at the “Imported References Group.” Now you will conduct a global edit of your newly imported references.
  - b. Click on **[Tools]** from the Endnote menu bar and then click on “**Change/Move/Copy Fields.**”
  - c. After “**In:**” select the “**Name of Database**” field, and then select “**Replace whole field with:**”
  - d. Click inside the text box and enter “PsycINFO” and then click on the **[OK]** button.
  - e. Confirm the change by clicking on **[OK]**, and then confirm again by clicking **[OK]** one more time.
  - f. All of these references in the “Imported References Group” now include the name of the database from which they were retrieved. This is useful metadata added to each reference should you ever need to find all or some of the references in your library from this particular database.

## **EXERCISE** [SCOPUS](#) — Interface: Elsevier

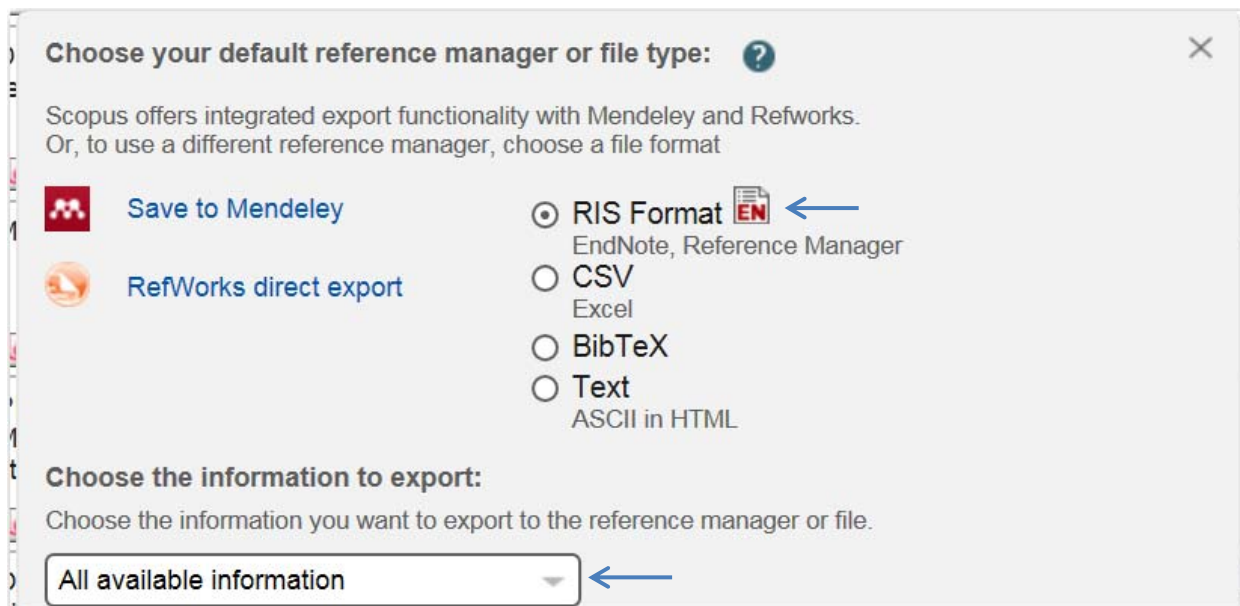
1. Open the SCOPUS database and conduct the following search.
2. Enter the expression “*cognitive dissonance*” W/4 *personality*. (including the quotation marks)

NOTE: The “W/4” is a proximity operator that, in this case, requires the word “personality” to be within 4 words of the expression “cognitive dissonance.” Any number may be substituted for the “4.”

3. Press the [**Search**] (magnifying glass) button.
4. Limit this result further from the “Subject Area” box to “**Psychology**”, and press the [**Limit to**] button.
5. In the **Document Results** box put a check in the “All” box to select all the references, and then select [**Export**].



8. This will invoke the **reference manager selection** box. (see below)
9. For “**Export format:**” select “**RIS**” format.
10. For “**Output:**” select “**All Available Information**” and then press [**Export**].



This may open a “File Download” box with 3 options: [Open], [Save] or [Cancel]; select [**Open**].

10. Records will be exported directly into the library that is currently open and active and will be placed in the “Imported References Group.”

**11. Randomly check these records for errors**

- a. If errors are detected, move the flawed records to another group, e.g., Problem References Group, to edit later.
- b. Assign the remaining references (usually most or all the records) to an appropriate “Group” or simply allow these references to become part of your library.

**12. Optional Global Edit to add valuable metadata:**

- a. Confirm that you are still looking at the “Imported References Group.” Now you will conduct a global edit of your newly imported references.
- b. Click on **[Tools]** from the Endnote menu bar and then click on **“Change/ Move/Copy Fields.”**
- c. After **“In:”** select the **“Name of Database”** field, and then select **“Replace whole field with:”**
- d. Click inside the text box and enter “Scopus” and then click on the **[OK]** button.
- e. Confirm the change by clicking on **[OK]**, and then confirm again by clicking **[OK]** one more time.
- f. All of these references in the “Imported References Group” now include the name of the database from which they were retrieved. This is useful metadata added to each reference should you ever need to find all or some of the references in your library from this particular database.

**EXERCISE** [Summon](#) (This search tool provides a master index for many of the research literature databases, including the UC Libraries' library catalog.)

1. Open the Summon database.
2. Select the **[Advanced Search]** option to invoke the window displayed below.
3. In the **title search** box, enter the following expression: **child\* obesity longitudinal** and press the **[Search]** button.

With these **terms**:  [Basic Search](#)

Written/created by:   
e.g. Fitzgerald

With these words in the **title**:   
e.g. The Great Gatsby

**ISBN**:

From this **publication**:   
e.g. Journal Of Endocrinology

**Volume**:  and **Issue**

**Dates** published from:   to

Show with this **format**:

Show Only:  Items with full text online  
 Scholarly materials, including peer-reviewed  
 Items in the library catalog (mostly print and physical material)

Exclude from results:  Newspaper articles  
 Book reviews  
 Dissertations

Expand your results:  Include results from outside your library's collection

[Reset Form](#) [Clear Form](#)  [Cancel](#)

4. Save the first three references by clicking on the “**save this item**” icon associated with each reference. (Note: You will need to “mouse over” each reference to activate this icon.)

Analysis of Drop-Outs in a **Longitudinal Study: The Spanish Sample of the EU Childhood Obesity Programme: Early Programming by Infant Nutrition (QLK1-2001-00389) (EPOC)**

Author: Méndez, G; Escribano, J; Closa, R; Capdevila, F; Luque, V; Mariné, J  
 Early Nutrition and its Later Consequences: New Opportunities Vol: 569 ISSN: 0065-2598 Date: 2005 Start Page: 217  
 Subjects: Medicine & Public Health, Developmental Biology, Pediatrics, Medicine/Public Health, general

**Availability:** Full Text Online

5. At the bottom of the Summon search results page click on your “Saved Items” (see below) to invoke the “**Saved Items**” dialog box.

2015 Summon | Powered by Summon™

Personalized Search | Saved Items (3) | Clear

6. Click on “**EndNote.**” This may open a “File Download” box with 3 options: [Open], [Save] or [Cancel]; select **[Open]**.
7. Records will be exported directly into the library that is currently open and active and will be placed in the “Imported References Group.”
8. Randomly check these records for errors
  - a. If errors are detected, move the flawed records to another group, e.g., Problem References Group, to edit later.
  - b. Assign the remaining references (usually most or all the records) to an appropriate “Group” or simply allow these references to become part of your library.
9. Optional Global Edit to add valuable metadata:
  - a. Confirm that you are still looking at the “Imported References Group.” Now you will conduct a global edit of your newly imported references.
  - b. Click on **[Tools]** from the Endnote menu bar and then click on “**Change/ Move/Copy Fields.**”
  - c. After “**In:**” select the “**Name of Database**” field, and then select “**Replace whole field with:**”
  - d. Click inside the text box and enter “Summon” and then click on the **[OK]** button.
  - e. Confirm the change by clicking on **[OK]**, and then confirm again by clicking **[OK]** one more time.
  - f. All of these references in the “Imported References Group” now include the name of the database from which they were retrieved. This is useful metadata added to each reference should you ever need to find all or some of the references in your library from this particular database.

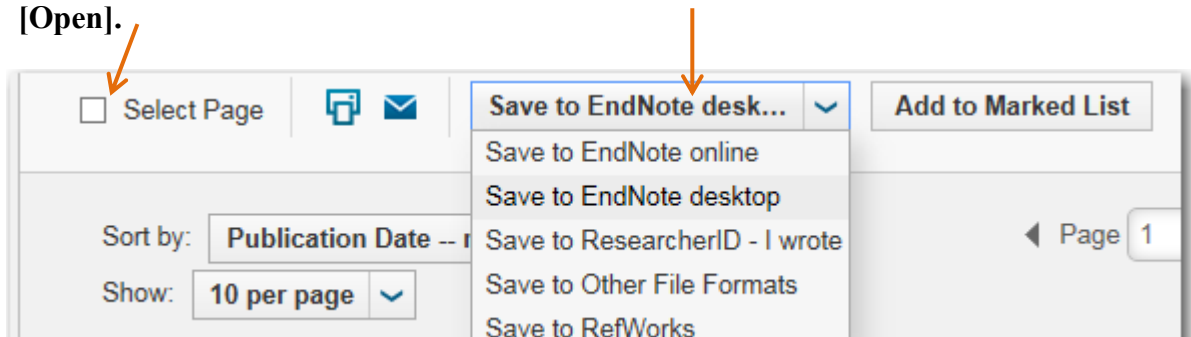
**EXERCISE** [Web of Science](#) (Web of Knowledge) — **Vendor: Thomson Reuters**

1. Open the “**Web of Science**” database.
2. Enter the following search query: “**learning style\***” NEAR/4 **technolog\*** (see below), then select the “**Title**” field, and then click on the [Search] button to invoke the search.



3. The Web of Science will display the first 10 of your retrieved records. Scroll to the bottom of the page (image below). The next three steps will prepare your records for exporting *to EndNote*.
  - a. Step 1: Select “**Select Page**” to save the first 10 records from your search.
  - b. Step 2: Select “**EndNote desktop**” as your citation & reference management tool.
  - c. Step 3: “For Record Content:” select “Author, Title, Source, Abstract,” and then click on “**Send.**”

This may open a “File Download” box with 3 options: [Open], [Save] or [Cancel]; select [Open].



4. Records will be exported directly into the library that is currently open and active and will be placed in the “Imported References Group.”
5. Randomly check these records for errors
  - a. If errors are detected, move the flawed records to another group, e.g., Problem References Group, to edit later.
  - b. Assign the remaining references (usually most or all the records) to an appropriate “Group” or simply allow these references to become part of your library.

7. Optional Global Edit to add valuable metadata:
  - a. Confirm that you are still looking at the “Imported References Group.” Now you will conduct a global edit of your newly imported references.
  - b. Click on **[Tools]** from the Endnote menu bar and then click on **“Change/ Move/Copy Fields.”**
  - c. After **“In:”** select the **“Name of Database”** field, and then select **“Replace whole field with:”**
  - d. Click inside the text box and enter “Web of Science” and then click on the **[OK]** button.
  - e. Confirm the change by clicking on **[OK]**, and then confirm again by clicking **[OK]** one more time.
  - f. All of these references in the “Imported References Group” now include the name of the database from which they were retrieved. This is useful metadata added to each reference should you ever need to find all or some of the references in your library from this particular database.

## EXERCISE [WorldCat](#) — Interface: OCLC FirstSearch

1. Open the WorldCat database, and conduct the following search.
2. Enter the expression “**difference\* gender science**” (see below) into the first search text box, and limit your search to the “**Title**” field. (Note: WorldCat inserts the Boolean “AND” between search terms.)
3. Further limit your search by entering “**2007-2012**” into the Year box and checking the “**Books**” box and then press [Search].

The screenshot shows the WorldCat search interface. At the top, there are 'Search' and 'Clear' buttons. Below that, the database is identified as 'WorldCat' (Updated: 2012-12-18), described as the 'OCLC catalog of books and other materials in libraries worldwide'. The search criteria are: 'Search for: difference\* gender science' in the 'Title' field. Below this, there are two more search rows, each with an 'and' dropdown and a 'Keyword' field. The 'Limit to:' section includes: 'Year: 2007-2012 (format: YYYY-YYYY)', 'Language: No Limit', and 'Number of Libraries: All'. The 'Limit type to:' section has a checkbox for 'Books' which is checked, and other options like 'Serial Publications', 'Articles', 'Visual Materials', 'Sound Recordings', 'Musical Scores', 'Computer Files', 'Archival Materials', 'Maps', and 'Internet Resources' are unchecked. Blue arrows point to the search term, the 'Title' field, the 'Year' field, and the 'Books' checkbox.

4. Click on the “**Export**” button from the menu bar

The screenshot shows the menu bar of the WorldCat search results page. The menu items are: Home, Databases, Searching, and Results. Below these, there are buttons for 'List of Records', 'Detailed Record', 'Marked Records', and 'Saved Records', along with a 'Go to page' dropdown. A row of icons includes 'Sort', 'Related', 'Limit', 'E-mail', 'Print', 'Export', and 'Help'. The 'Export' button is highlighted with a blue arrow. To the right, the text reads: 'WorldCat results for: ti: difference\* a' and 'Records found: 41 (English: 40) Rank by'.

5. From the “Direct Export Records” screen select the radio button for “**Records 1-10**,” and select “**EndNote**,” then press [Export].

The screenshot shows the 'Direct Export Records' screen. It has three sections: 'Export:', 'Export To:', and 'Note:'. The 'Export:' section has two radio buttons: 'Records 1 - 10' (selected) and 'EndNote (get latest filters)'. The 'Export To:' section has three radio buttons: 'RefWorks', 'Text file', and 'EndNote'. The 'Note:' section says 'OCLC does not distribute or provide support'. At the bottom, there is an 'Export' button. A blue arrow points to the 'EndNote' radio button in the 'Export To:' section.

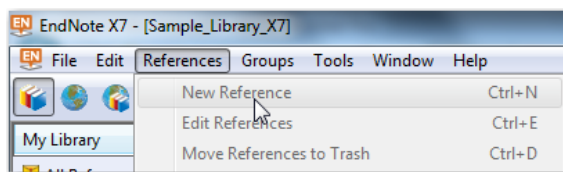
6. This may open a “File Download” box with 3 options: [Open], [Save] or [Cancel]; select **[Open]**.
7. From the “Choose an Import Filter” box, enter “**WorldCat**” into the “Quick Search” box and press the **[Enter]** key.
8. Select “WorldCat (OCLC) and press the **[Choose]** button.
9. Your newly imported references will display in the “Imported References” group.
10. Randomly check these records for errors.
  - a. If errors are detected, move the flawed records to another group, e.g., Problem References Group, to edit later.
  - b. Assign the remaining references (usually most or all the records) to an appropriate “Group” or simply allow these references to become part of your library.
11. Optional Global Edit to add valuable metadata:
  - a. Return to the “Imported References Group” to provide a global edit of your newly imported references.
  - b. Click on **[Tools]** from the Endnote menu bar and then click on “**Change/ Move/Copy Fields.**”
  - c. After “In:” select the “Name of Database” field, and then select “Replace whole field with:”
  - d. Click inside the text box and enter “WorldCat,” and then click on the **[OK]** button.
  - e. Confirm the change by clicking on **[OK]**, and then confirm again by clicking **[OK]** one more time.
12. All of these references in the “Imported References Group” now include the name of the database from which they were retrieved. This is useful metadata added to each reference should you ever need to find all or some of the references in your library from this particular database.

# Manual Entry & Editing of References

As indicated previously, the most efficient method for entering new references, particularly multiple references, into your EndNote library is usually via direct export from a database. Occasionally, however, manual entry of references is necessary or even preferable to the direct export. There will be occasions, for example, when you have a single reference or perhaps even several references to enter into your EndNote database and none of the references came from or appeared to come from an electronic database. In such instances you may find manual entry faster and more convenient than trying to “find” said references in an electronic database that provides an export or even an import capability.

## Creating a New Reference

Adding a new reference manually is usually a simple, straight forward operation. Open a new reference data form (see right), be sure to enter the correct reference type, enter the bibliographic information and save the reference. Details for entering specific bibliographic information can be found on page 52 of the *EndNote X7 User Guide*.



## Choosing a Reference Type

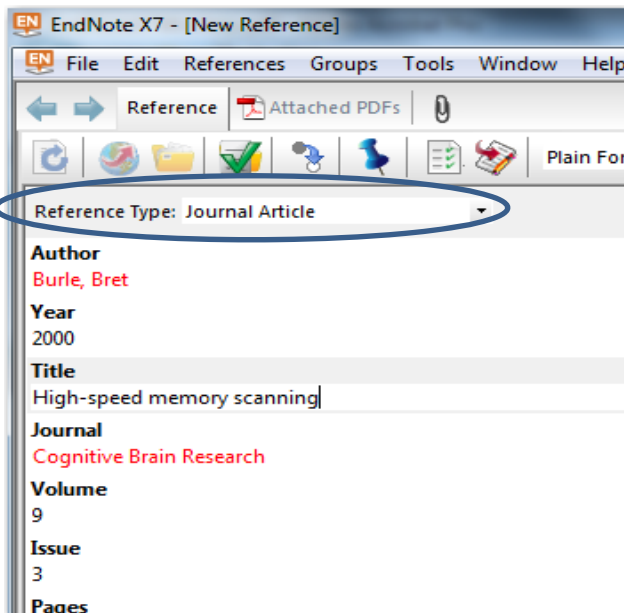
The “reference type” (book, journal, manuscript, etc.) not only determines the type and number of editable fields in a reference, but it also controls the formatting of the references for bibliographies. Therefore, it is essential that you select the appropriate reference type when manually adding new references.

### **EXERCISE Manually adding references**

1. Open your MyFirst library.
2. The data for this exercise is in the box on the right. You have two references to enter by the author Bret Burle.
3. If you want to place this reference in one of your custom Groups, highlight that group. Otherwise, highlight the EndNote permanent group, “All References.”
4. Select References from the EndNote menu bar and then select New Reference. **(See above)**
5. For “Reference type” select “Journal Article.” (This is a critical step. Be certain you select the appropriate Reference Type to ensure your data displays correctly in the output style you choose.) **(See image on the right)**
6. Enter your data in all the necessary fields.
7. Save the reference by closing it.
8. Repeat this exercise with the 2<sup>nd</sup> Burle reference.

Burle, Bret (2000). High speed memory scanning. *Cognitive Brain Research*, 9(3), 327-337.

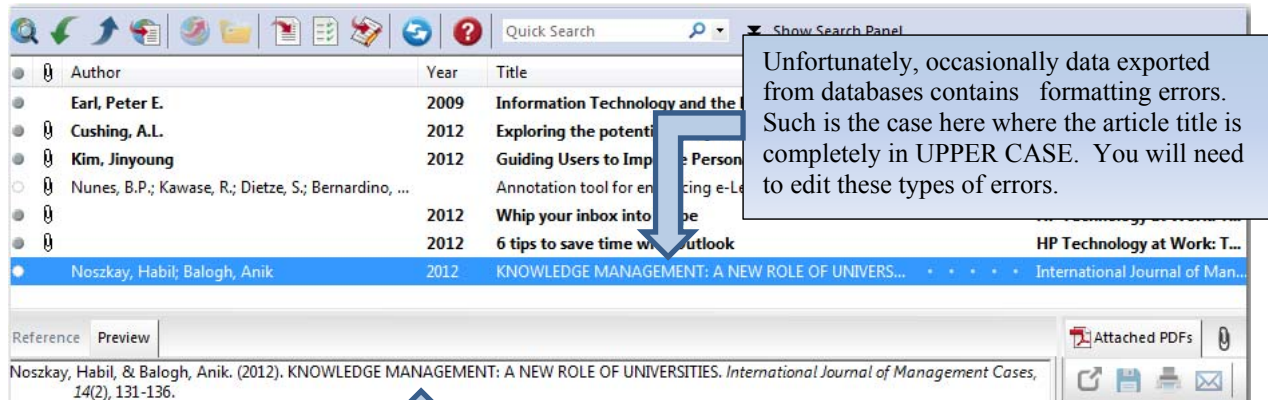
Burle, Bret (2000). Response selection in a four choice task. *Cognitive Brain Research*, 9(4), 125-134.



**TIP: When you manually create references, be aware of which EndNote group or customized group is highlighted or open. The new reference will be automatically added to the open group.**

## Editing a reference

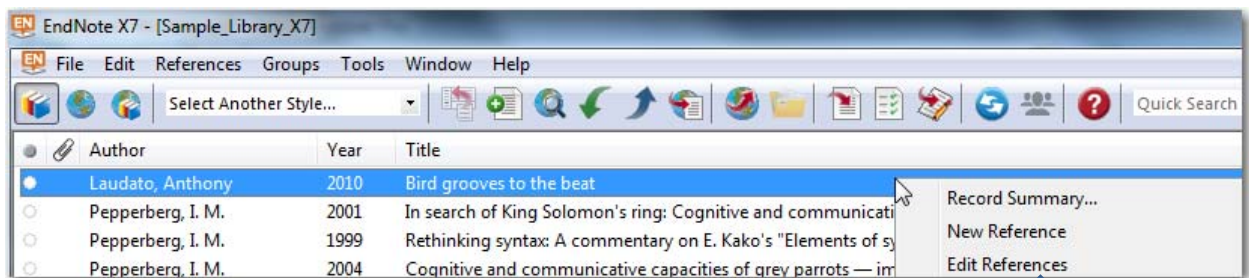
There are many reasons to edit a reference. Perhaps the two most common reasons are to either correct reference formatting errors, e.g., all of the letters in a reference title exported from a database are in upper case (see below), or to add additional information, e.g., a missing author's name or even your own notes to enhance the value of a reference.



This formatting error causes an output error. In this case, the title of this article will be output in the bibliography in UPPER CASE. (Shown in APA 6<sup>th</sup> ed. style.)

## Selecting and opening single & multiple References


To work on a reference (e.g., to edit, copy, export, etc.) simply highlight the reference, right click and then select “Edit References” from the drop down menu (see below). OR just double click on the reference; does the same thing. To select a group of non-contiguous references, hold down the [Ctrl] key and highlight references. To select a contiguous group of references, drag your mouse cursor over them with the left mouse button suppressed. Finally, to select the complete group of references in the library window, click on [Edit] on the EndNote menu bars and then click on “Select All.”




Left click on the reference to highlight it, and then right click to invoke the drop down menu. Then click on “Edit References.”

## **EXERCISE Opening and closing single and multiple references** (use the (MyFirst library))

1. To OPEN a reference in the Reference List panel complete either of the following operations:
  - a. double click on a single reference OR
  - b. highlight a reference and then click on **References** from the menu bar and then click on “**Edit References.**”
2. CLOSE the reference by using either of the following techniques:
  - a. click on **File** on the menu bar, and then click on “**Close Reference.**”

- b. Click on the inner  box in the upper right hand corner of the EndNote window.

### **Multiple References**

1. To OPEN multiple references, highlight any five references in the Reference List pane.
2. Click on **References** on the EndNote menu bar, and then click on “**Edit References**” to open all five references.
3. CLOSE one of the five references by using either of the following techniques:
  - a. click on **File** on the EndNote menu bar, and then click on “**Close Reference.**” OR
  - b. click on the inner  box in the upper right hand corner of the EndNote screen.
4. CLOSE the remaining four references by holding down [Ctrl] [Shift] and pressing the [W] key.

# Importing Saved References into EndNote

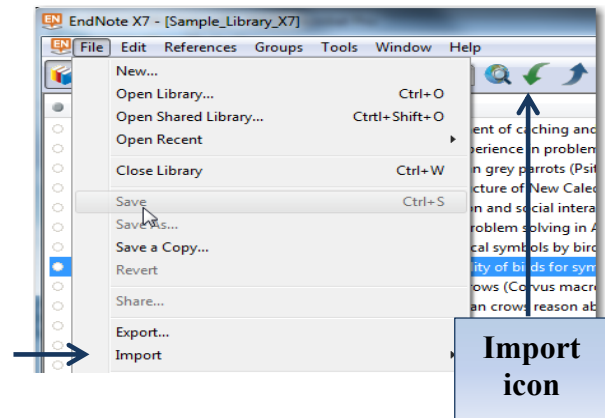
Either of two reasons may direct you to “import” references into Endnote.

- 1) Occasionally your only electronic option for adding references to your EndNote library is to **import** references by using the “importing saved references” function. This is true when a research literature database does not offer a direct export option or if the database offers the direct export option but it fails to work.
- 2) Articles you have already downloaded as PDFs are often more convenient to “import” than to add all of the data manually and then “attach” the PDF to the reference. If you have a single PDF or even a folder of PDF files, it may be possible to import such references with a minimal amount of typing, and the PDF is automatically attached to the reference.

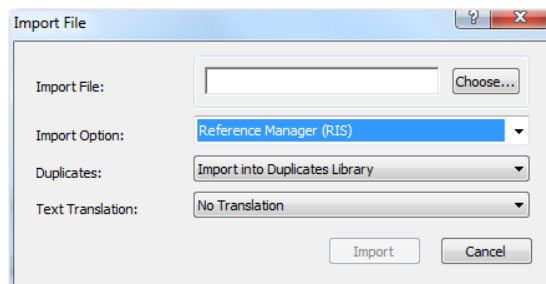
The process of importing references may require a few more steps than using the direct export function but there is at least one major advantage to importing. Importing references from research literature databases does enable control over duplicate references.

Importing references from a research literature database requires that you “save” the references in a text (.txt) file and in a tagged format. (Note: This step is not necessary for importing PDFs.) The latter requirement simply means that you must save the records in an “EndNote,” tagged or similarly named format.

Once you have saved the data as a “.txt” file, you simply click on **[FILE]** from the EndNote menu bar and then select “Import” from the drop down menu (right) and then select “File.” **OR simply click on the “import” icon on the same menu bar (right).**



This will invoke the “**Import File**” box into which you enter the path (see “Choose”) for your saved tagged file, select the correct import filter and make a decision on how to handle duplicate records.



### EndNote import exercises in this workbook

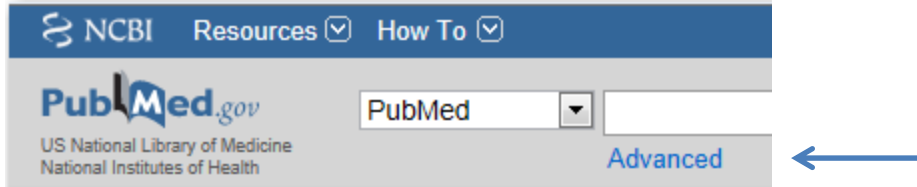
<b>Database Name</b>	<b>Brief Description</b>	<b>Notes</b>
<b>PubMed</b>	National Library of Medicine (NLM) database of the biomedical literature	No direct export option is available from NLM. Data must be imported into EndNote.
<b>RefWorks</b>	This is a personal bibliographic service similar to EndNote	RefWorks references are exported as a file in RIS format. The exercise for importing references from RefWorks includes instructions for this operation. The RIS file of exported references from RefWorks can be imported into EndNote, again in RIS format.
<b>PDF or folder of PDFs</b>	Either a single PDF or a folder of PDFs can be imported into EndNote, often with complete bibliographic information.	Sometimes the PDFs have no DOI or the article is not registered with CrossRef.org and no bibliographic information is downloaded.

**(NOTE: Two of the three import exercises in this workbook include instructions for searching, retrieving records, preparing those records for importing and importing into EndNote. The PDF import instructions include only information about importing the records into EndNote. For the PDF exercise you need only save the folder of PDF articles (attached to the top of the [PDF exercise page](#)), to your desktop and then open it during the EndNote import process.)**

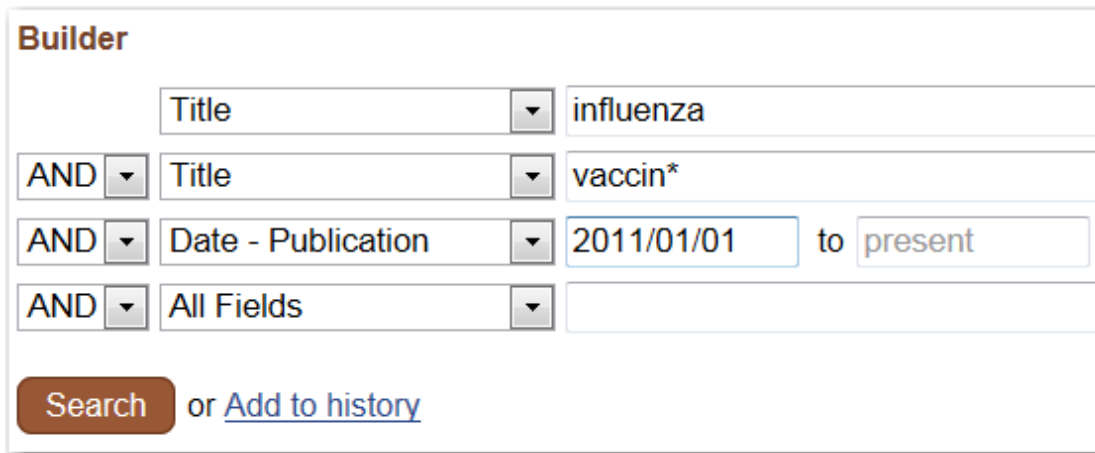
## EXERCISE [PubMed](#) — Interface: NLM

This example includes an exercise in opening the PubMed database and saving references as a text file. URL for PubMed (<http://www.ncbi.nlm.nih.gov/entrez/query.fcgi?db=PubMed>)

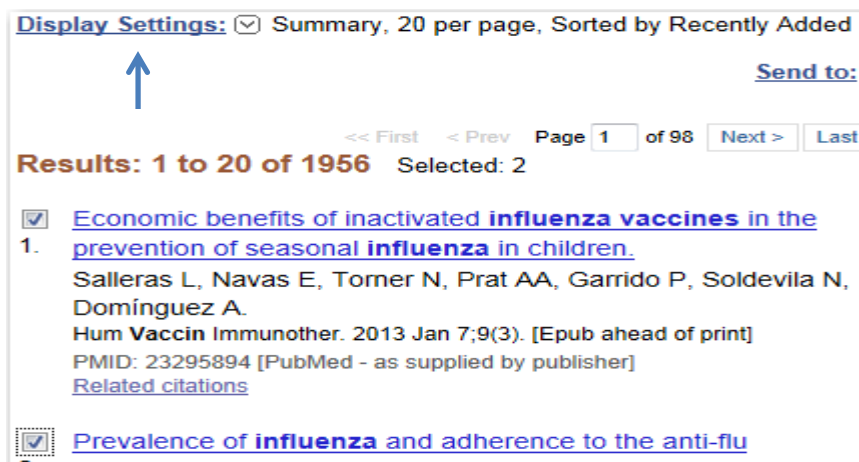
1. Open the PubMed database and select the “Advanced” search mode (below).



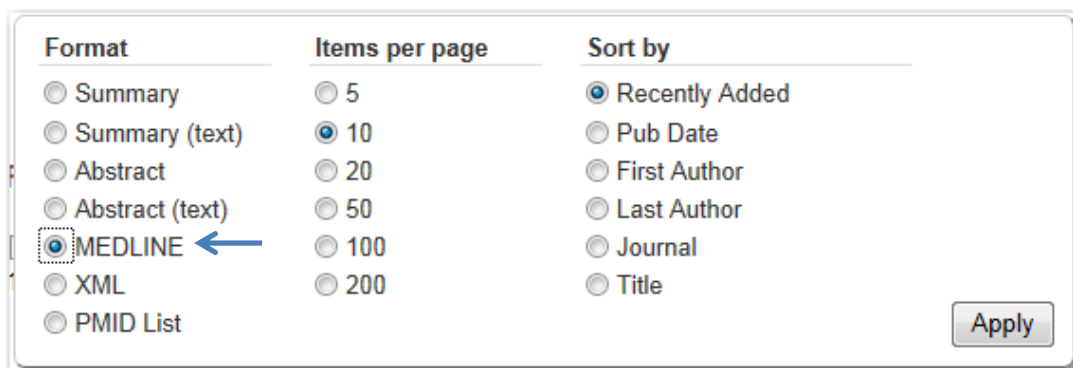
1. Enter a search for the terms *influenza* AND *vaccin*\* (both in the TITLE fields) for publications dated *2011* to the *present*, and click on the [Search] button. See the Advanced Search box below.

A screenshot of the PubMed search builder interface. It shows a 'Builder' section with four rows of search criteria. The first row has 'Title' selected and 'influenza' entered. The second row has 'AND' selected, 'Title' selected, and 'vaccin\*' entered. The third row has 'AND' selected, 'Date - Publication' selected, '2011/01/01' entered, 'to' selected, and 'present' entered. The fourth row has 'AND' selected, 'All Fields' selected, and an empty field. At the bottom, there is a 'Search' button and a link to 'Add to history'.

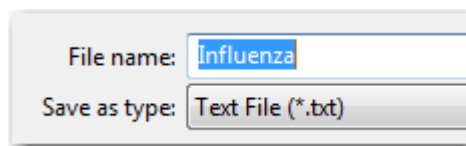
2. Your results will display as in the graphic below. Select the first four records and then click on “Display Settings” to put your records in the correct format for exporting into EndNote.



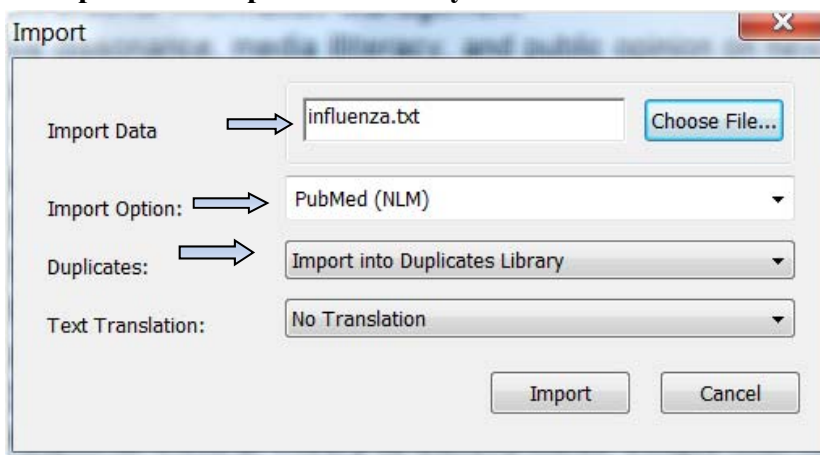
- To prepare your results for importing into EndNote, select “MEDLINE” for your format, and then press the [Apply] button (see below).



- Use your **Browser’s “Save As”** function to save the file to your computer. Name the file “Influenza.” **Make sure to save the file as a “.txt” file** via the **Save as type** option (see below). (**Note:** you may want to pay attention to “where” you save the file.)



- Open EndNote and select your MyFirst library or another EndNote library of your choosing.
- Select **File** from the menu bar, select **Import** and then select “**File.**” The Import box will display (see below).
- From the Import dialog box, press the [Choose File...] button to find and select the file you just saved via your browser.
- For the **Import option**, select “**PubMed (NLM)**” as the import filter you will use to convert your data.
  - If PubMed (NLM) does not appear in the short list of filters, select “**Other filters.**”
  - A “Choose an Import Filter” box will open. Enter “**pubmed**” in the Quick Search box and press [Enter].
  - Click on “**PubMed (NLM)**” and then press [Choose].
- For the **Duplicates option**, select “**Import into Duplicates Library.**”
- Click on the [Import] button.
- The imported references will appear in the “Imported References” group.



13. Randomly check these records for errors
  - a. If errors are detected, move the flawed records to another group, e.g. Problem References Group, to edit later.
  - b. Assign the remaining references (usually most or all the records) to an appropriate “Group” or simply allow these references to become part of your library.
  
14. Optional Global Edit to add valuable metadata:
  - a. Return to the “Imported References Group” to provide a global edit of your newly imported references.
  - b. Click on **Tools** from the Endnote menu bar and then click on “**Change/ Move/Copy Fields.**”
  - c. After “In:” select the “**Name of Database**” field, and then select “**Replace whole field with:**”
  - d. Click inside the text box and enter “**PubMed,**” and then click on the **[OK]** button.
  - e. Confirm the change by clicking on **[OK]**, and then confirm again by clicking **[OK]** one more time.

**EXERCISE RefWorks** — RefWorks is a personal bibliographic management tool, similar to EndNote. It is possible to transfer records from RefWorks into EndNote.

1. Select **File** from the EndNote menu bar, then select **Import** and then select **File**.
2. From the **Import File** dialog box, **choose** (find and select) the file you wish to import. In this exercise find the file “RefWorksExport.txt” in the ...Roberts/EndNote folder.. Highlight this file and press [**Open**]. (*Note: The references used in this exercise were already exported from RefWorks for you. If you need to perform this operation, follow the instructions in the side bar.*)

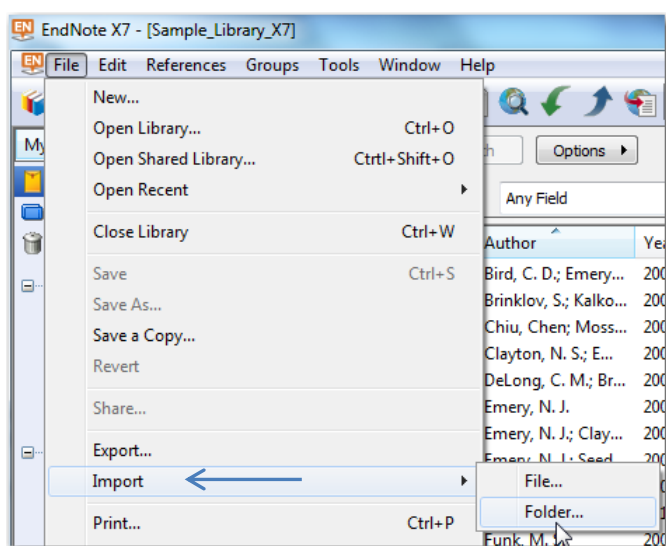
### Instructions for Exporting References from RefWorks

1. Select **References** from the RefWorks menu bar, and then select **Export** to display the Export screen.
  2. Identify the references you wish to export by selecting one of the following options: “All References,” “MyList” or one of your folders.
  3. In the **Export Format** options area, select “Bibliographic Software” to create a text file suitable for import into EndNote.
  4. Click on the [**Export**] button to open a new browser window of your exported references.
  5. Use your browser to save these references as a “.txt” file, and then follow the instructions in the above RefWorks exercise to import the references into EndNote.
3. For the **Import option**, select **RefManager (RIS)** as the import filter you will use to convert your data.
    - a. If RefManager (RIS) does not appear in the short list of filters, select “**Other filters.**”
    - b. The “**Choose an Import Filter**” box will open. Enter “**RefMan RIS**” in the Quick Search box and press [**Enter**].
    - c. Click on “**RefMan RIS** “ and then press [**Choose**].
  4. For the **Duplicates** option, select “**Import into Duplicates Library.**”
  5. Click on the [**Import**] button.
  6. The imported references will appear in the “Imported References” group.
  7. Randomly check these records for errors
    - a. If errors are detected, move the flawed records to another group, e.g., Problem References Group (a group you created) to edit later.
    - b. Assign the remaining references (usually most or all the records) to an appropriate “Group” or simply allow these references to become part of your library., i.e., no groups assigned.
8. Optional Global Edit to add valuable metadata:
    - a. Return to the “Imported References Group” to provide a global edit of your newly imported references.
    - b. Click on [**Tools**] from the Endnote menu bar and then click on “**Change/Move/Copy Fields**” to open a new dialog box.
    - c. After “**In:**” select the “**Database Provider**” field, and then select “**Replace whole field with:**”
    - d. Click inside the text box and enter “Data from [whomever sent you the data],” and then click on the [**OK**] button.
    - e. Confirm the change by clicking on [**OK**], and then confirm again by clicking [**OK**] one more time.

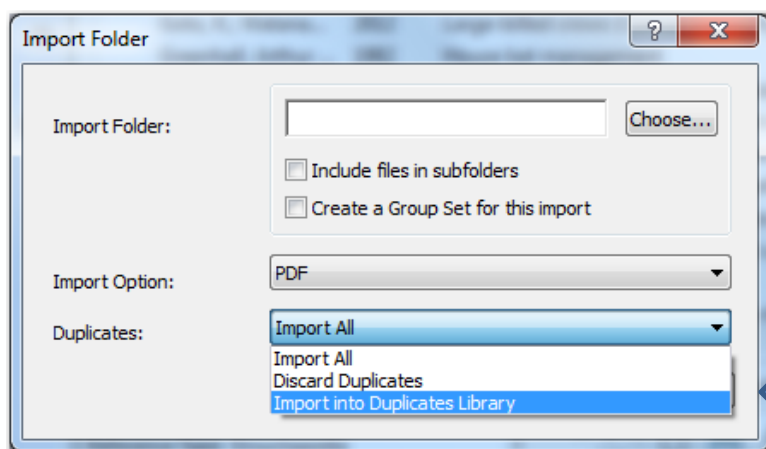
## Importing References from PDF Files/Folders

The PDF import feature enables fast and convenient conversion of a folder of PDF files or the conversion of a single PDF file into EndNote references. This feature requires the PDF documents be readable (not an image) and include a DOI (digital object identifier). EndNote creates references by using the DOI information and capturing data from [www.CrossRef.org](http://www.CrossRef.org). Moreover, the full text record is “automatically” added to the respective EndNote reference.

### **EXERCISE (1) -- Folder of PDF files (Desktop>Roberts > EndNote > PDF\_Folder)**



1. Open the EndNote Library into which you want to import the PDF references.
2. Select [**F**ile] from the menu bar, then select “**I**mport” and then select “**F**older.” (see left) to open the “**I**mport Folder” dialog box. (below and left)
3. Use the [**C**hoose] button to locate and select the desired folder of PDFs.  
**Note:** If the selected folder includes sub-folders of PDFs, be sure to check the “Include files in subfolders” box.
4. For the “**I**mport Option:” select “**P**DF.”
5. For “**D**uplicates” select “**I**mport into **D**uplicates **L**ibrary.” (see below)
6. Click the [**I**mport] button to invoke the process to create the references and attach the PDFs to each reference.



### **Duplicates**

You actually have 3 options here:

1. Import All – gets everything, including duplicates
2. Discard Duplicates – uses an EndNote algorithm to identify and discard duplicates
3. Import into Duplicates Library – uses the same algorithm to identify duplicates, but EndNote saves the duplicates into a “Duplicates” library.”

(Note: the duplicates library will be similar to the library into which you just imported references. For example, if your EndNote library is “MyFirst,” your duplicates library will be “MyFirstDuplicates.”)

## **EXERCISE (2) -- A Single PDF file**

1. Open the EndNote Library into which you want to import a PDF reference.
2. Select **[File]** from the menu bar, then select “Import” and then select “File” to open the “Import Folder” dialog box.
3. Use the **[Choose]** button to locate and select the desired PDF file.
4. For the “**Import Option:**” select “**PDF.**”
5. For “**Duplicates**” select “**Import into Duplicates Library.**”
6. Click the **[Import]** button to invoke the process to create the reference and attach the PDF to the reference.

# Executing the EndNote Online Search (Please read the TIP below)

EndNote provides access to local catalogs such as UCLID and OhioLINK and to hundreds of other online catalogs, including some notable and prodigious databases such as the Library of Congress and the National Library of Medicine. The EndNote Online Search utility through which you can search the aforementioned catalogs/databases is the same utility used to search your own EndNote built library. Through this one search utility/interface you can search your EndNote library, UCLID, OhioLINK and hundreds of other catalogs/databases, thus reducing the learning curve you would experience if you had to use different interfaces for all of those catalogs/databases. Moreover, EndNote's Online Search utility exports records from those catalogs/databases into EndNote accurately and seamlessly. This is often not the case if you were to attempt to export records from the search utilities of the individual library catalogs.

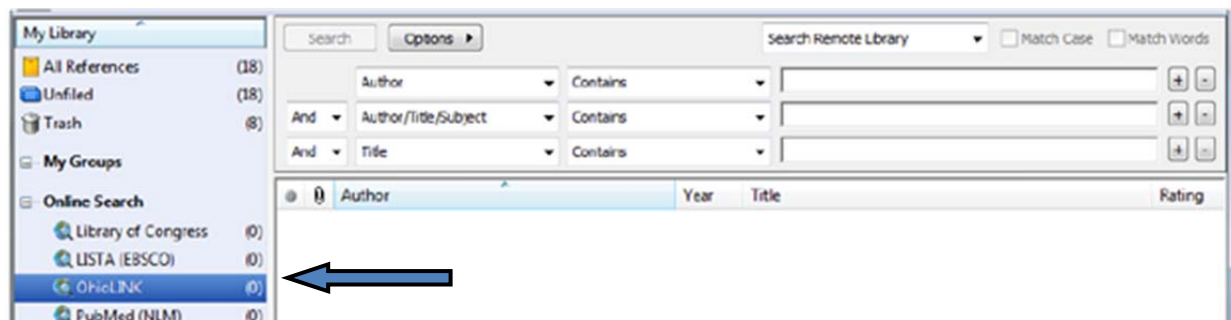
**TIP: The EndNote online search tool is an information retrieval protocol (Z39.50) used for searching library catalogs and selected "free" research literature databases. Fee-based (access restricted) databases are generally not available through the EndNote's Z39.50 utility. Fee-based databases, e.g., PsycINFO or ABI Inform, are best searched by using the search engine or interface of the fee-based database. Records from these databases may then be exported or imported to EndNote.**

## Overview

EndNote uses "connection files" to store specific information on how to connect and search hundreds of catalogs. You must select the correct connection file to search a specific catalog.

## EXERCISE Setting up Connection groups for access to library catalogs

1. Make sure your Groups panel is open. If not, select **[Groups]** from the EndNote menu bar, and then select "Show Groups" to open the Groups panel.
2. Click on the **Show Search Panel** option on the menu bar.
3. Click on **[Tools]** from the EndNote menu bar.
4. Click on "Online Search." This will open the "Choose A Connection" dialog box.
5. In the "Quick Search" box enter the name of the catalog or database you wish to search. In this instance enter "ohiolink" and press the **[Enter]** key.
6. Highlight "OhioLINK," to add it as a favorite and then press the **[Choose]** button.
7. The connection you selected, OhioLINK, will now appear in the Groups panel under the Group Set "Online Search." (see below)



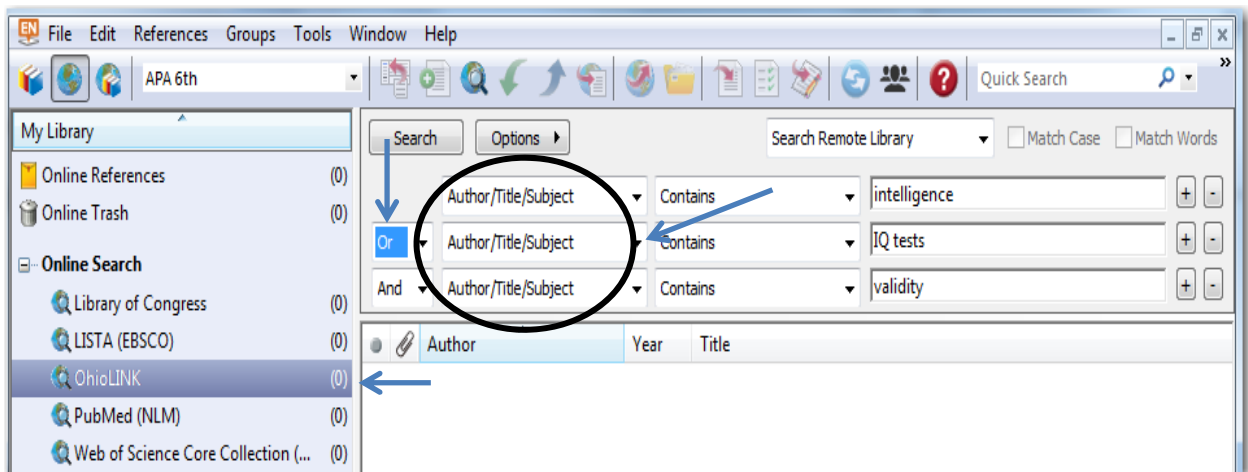
## **EXERCISE Performing a remote database (library catalog) search**

1. Complete the preceding exercise on “Setting up Connection groups...”
2. Make sure the Groups panel is open. If it is not, open it by clicking on **Groups** on the menu bar and then clicking on “**Show Groups.**”
3. Click on the “**Online Search Mode**” icon (see below, dashed arrow) on the EndNote menu bar . (NOTE: This will open a temporary Reference List panel for your search results.)

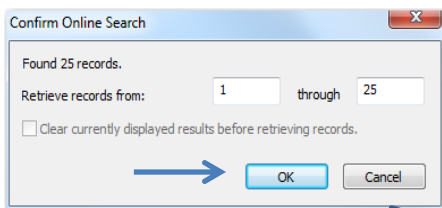


Online Search Mode icon

4. In the Groups panel and under “Online Search,” click on the “OhioLINK” group (see below). (Note: This will invoke the OhioLINK connection file and open the EndNote Online Search box to enable your search of the OhioLINK catalog.)
5. Set up your search to look “exactly” as in the graphic below, especially including the “OR” in the first Boolean operator box and all the search fields set to “**Author/Title/Subject**,” and then click on the [Search] button to begin the search.



6. A “**Confirm Online Search**” box should indicate your search result total. Click on the [OK] button to download these results to your temporary library online search window.

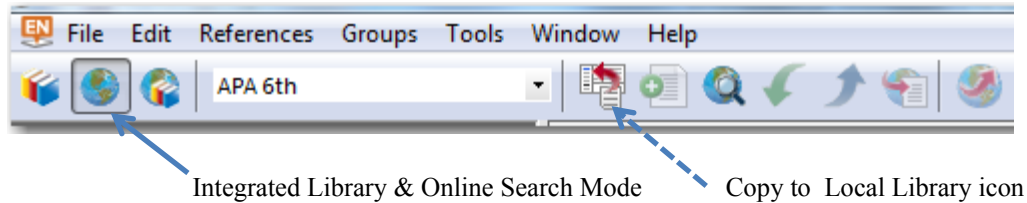


OR – if your retrieved too many records, select the [Cancel] button to cancel the download.

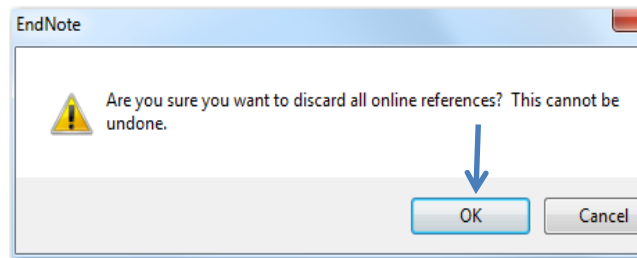
**TIP1:** At any point during the downloading of these records you may pause the process by clicking on the [Options] button (see image above) and then clicking on “Pause.”

**TIP2:** If you retrieved too many records you can either adjust the total downloaded to your library or cancel the download entirely and refine the search to retrieve fewer records.

7. Copy any four references (see 3a & 3b below) for your EndNote Library using the “**Copy to Local Library**” icon (below). The remaining references will NOT be added to your personal library.
  - a. Select references you wish to keep by holding down the [Ctrl] key and clicking on each reference you intend to keep.
  - b. After selecting (highlighting) references, click on the “**Copy to Local Library**” icon (graphic below, dashed arrow) and then click on the “**Integrated Library & Online Search Mode**” icon (graphic below, solid arrow) to return to your local library.



- c. An EndNote “Warning” message will appear to confirm your discarding of “all online references.” You may click [OK] for this.



8. Your new references will appear in the “Copied References” group at the top of the Group panel. Click on “Copied References” to display these references in the References List pane.

## Creating Groups

Groups can be an extremely useful tool to facilitate the organization of your EndNote references. EndNote creates many of these groups, and you have the option to create three additional types of groups. All of these groups can significantly enhance your ability to organize, manage and find your references. See the table below for an explanation of all the different types of groups.

Permanent & Temporary Groups Created by EndNote		Custom, Smart & Combination Groups Created by you (Limit: 5,000 groups)	
Permanent Groups	Description	Group Type	Description
<b>All References</b>	Displays “all” the refs <sup>1</sup> in your library	<b>Custom</b> (You create)	Refs can be copied or dragged and dropped into these groups. Updated only when you add refs to these groups.
<b>Unfiled</b>	Refs not placed in either a “custom” or “smart” group	<b>Smart</b> (You create)	Refs are added “automatically” based on your search query. Updated automatically when new refs match search query.
<b>Trash</b>	Refs removed from your library are held here until you remove them permanently. These refs are recoverable until removed from the Trash group -- similar to the Windows “Recycle Bin.”	<b>Combination</b> (You create)	Combination of smart and custom groups that are updated automatically when new refs match your saved search query and whenever you add refs manually to these groups.
<b>Sync Status</b>	Though placed in the Groups Panel, this is not truly a group. Clicking on “Sync Status” will provide information about the latest synchronization.		
<b>Sync Conflicts</b>	Appears only when there are conflicts with refs from synchronization		
<b>Temporary Groups<sup>2</sup></b>	<b>Description</b>		
<b>Duplicate References</b>	Refs found with the “Find Duplicates” command		
<b>Imported References</b>	The most recent group of refs imported or exported into your library		

<sup>1</sup> Refs is used as an abbreviation for “References.”

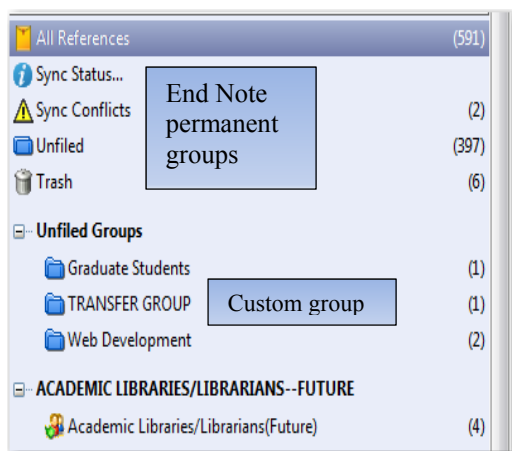
<sup>2</sup> These groups, not refs in them, are deleted when you close a library.

<b>Search Results</b>	The most recent group of refs resulting from either a quick or an advanced search of your EndNote library
<b>Full Text groups</b>	Comprised of dynamic sub groups that reveal full text searching results.

Permanent groups are just that – permanent. These group names always display in the group panel even if there are no references in them. Temporary groups, on the other hand, are deleted when your EndNote session ends, though the references from these groups remain in your library.

Customized, smart and combination groups are created by you. These groups provide an excellent organizational and management tool that enables you to create up to 500 groups of your EndNote references. You can place references manually to custom groups, and you can create a search query to “automatically” send references to groups, including newly added references, based on your saved search query. Additionally, a hybrid group, the Combination group, enables the “mixing” of the custom and smart groups to create a group to which you can manually place references or automatically add references via your save search query. Further, EndNote provides the “Group Set” feature that enables the creation of group sets for a higher level of categorization of your customized, smart and combination groups.

### Group panel



### Custom groups

References can be sent to custom groups via EndNote commands or by dragging the references to a custom group.

#### EXERCISE Creating a new custom group

(Open the MyFirst Library for this exercise.)

1. From the EndNote menu bar, click on **Groups** and then select “**Create Group.**”
2. Enter the name of your new group: *Treatment* and press [Enter].
3. Repeat the process and create a second group, “*Problem References.*”

(This latter group may be useful for depositing downloaded references that require some editing.)

#### EXERCISE Adding references to a custom group (Use the MyFirst Library for this exercise.)

1. Select the “**All References**” group.
2. Highlight any three references in the display window.
3. Right click your mouse and select “**Add References to.**”
4. Select the *Problem References* group to add these references to this group.

**TIP:** You may find the occasion to set a reference aside for later editing. By creating a group labeled “**Problem references**” or a similarly named group, you will have a place in which to “store” references until you find time to correct problems.

**EXERCISE** Removing references from any group and deleting groups (Use the MyFirst Library for this exercise.)

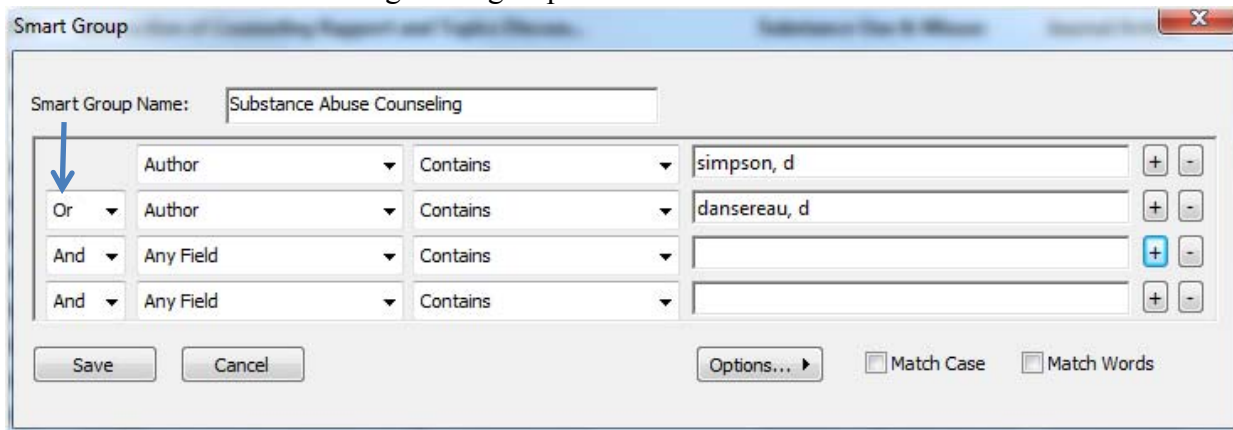
1. Click on the Problem References group in the Group panel.
2. Highlight the references you previously added.
3. Right click your mouse.
4. Click on “Cut.” (Note: These references will **NOT** be deleted from your library.)
5. Click on the **Delete** button to confirm.
6. Highlight the *Problem References* group, then right click and select “Delete” to remove the group. Click on the **Delete** button to confirm

## Smart groups

Smart groups are created with search criteria. References are automatically added to these groups by EndNote if the references match the search criteria. This is a very convenient way to organize references automatically.

**EXERCISE** Creating a smart group (Use the MyFirst Library for this exercise.)

1. From the EndNote menu bar click on **Groups** and then select **Create Smart Group**.
2. In the Smart Group search box that appears (see graphic below), enter “**Substance Abuse Counseling**” as the Smart Group Name.
3. Click on the down arrow next to “Any Field” and then select “Author” for the field label for the first two boxes.
4. Change the first Boolean operator from “And” to “Or.” (see the arrow in the image below)
5. Add the author names “exactly” as you see them in the graphic below.
6. Click on [**Create**] to create your new Smart Group. Hence forth any new reference added to your EndNote library that includes either of these two authors will automatically be added to this smart group. (NOTE: These two authors publish prolifically in the area of drug abuse counseling and therapy, thus adding everything added to your EndNote library with either of these two authors, regardless of words used to describe their works, will automatically be added to your Substance Abuse Counseling smart group.)
7. To test the effectiveness of this smart group open the **PsycINFO** research literature database and enter the search expression “exactly” (including case) as follows:  
**AU simpson, d\* OR AU dansereau, d\*) AND substance abuse**
8. Follow the instructions (steps 4 – 8) for exporting references from PsycINFO into your EndNote library on **page 11** of this workbook and note how the references are automatically placed into the Substance Abuse Counseling smart group.



## Combination groups

You cannot add references manually to “Smart” groups. References can be added **only** via the automatic route by utilizing a saved query. Custom groups, on the other hand, require manual deposits of references, nothing can be added automatically. Combination groups, because they can be composites of both smart and custom groups allow both manual and automatic entry of references. For example, let us assume there is a smart group defined by the following query:

***substance abuse OR drug abuse OR alcoholism***

### Results

All references added to your library with any of the terms on the left are automatically added to the smart group “Drug Abuse.”

**BUT**, what if a reference is added to your library with the expression “meth addiction” in the title? This reference would not be added to your “Drug Abuse” smart group, AND you cannot add it manually to the smart group.

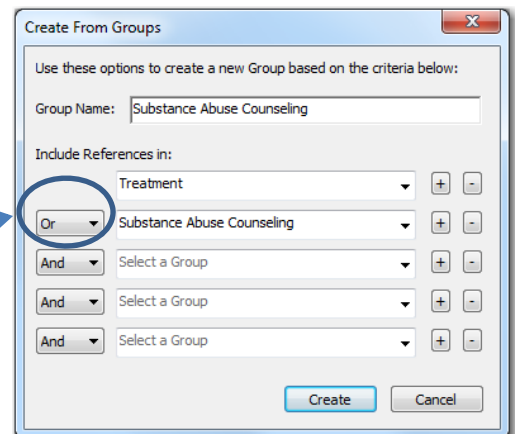
**However**, if you create a custom group (let’s also name it “Drug Abuse”) and manually add the reference to that group. **Then you create a “Combination group”** that combines the contents of both the smart and custom “drug abuse groups.

**Solution – the combination group enables you to collect rogue references that are on topic but do not use the words in your smart group query by adding them manually to the custom group, BUT you need check only your combination group for all the references related to drug abuse.**

## **EXERCISE** Creating a combination group (Use the MyFirst Library for this exercise.)

1. From the Groups panel, select “*Create from Groups*” to open the “*Create from Groups*” window.
2. Enter “*Substance Abuse Counseling*” for the group name.
3. Enter the group names for your previously created custom and smart groups (graphic on right).
4. Change the Boolean operator from AND to OR.
5. Click on [Create] to complete the exercise.

NOTE: By using the “**OR**” operator (step #4) all manually added references to the custom group “Treatment” and all “automatically” added references to the smart group “Substance Abuse Counseling” will be included in your combination group “Substance Abuse Counseling.”



## Group Sets

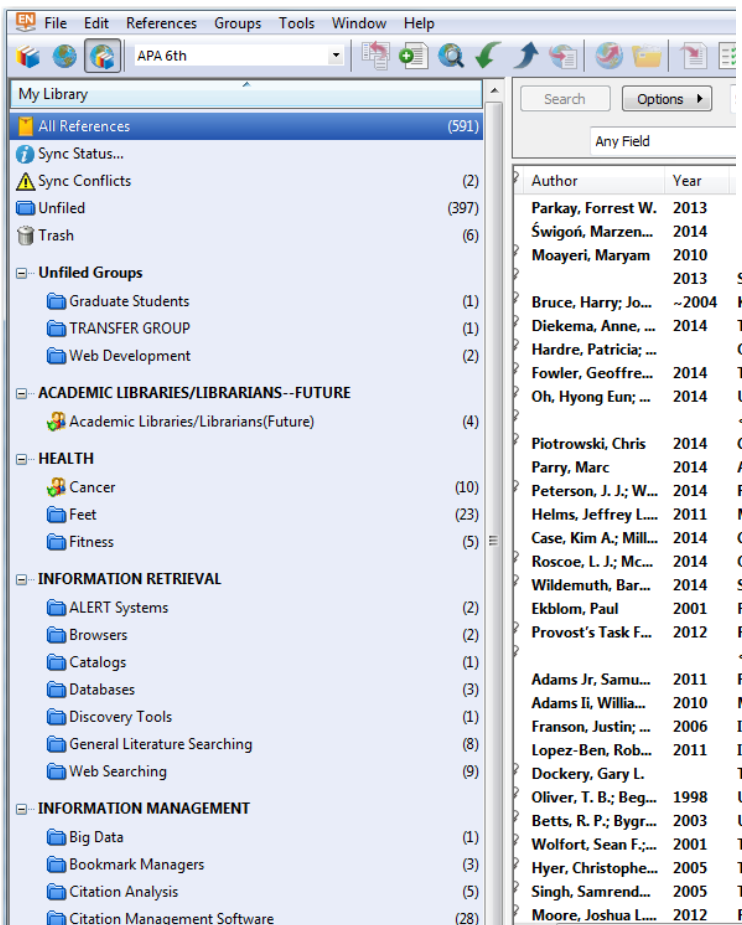
Group sets provide another level of organization of your customized and smart groups. All these groups may be organized by up to 500 group sets. EndNote provides two permanent group sets: “**Find Full Text**” and “**Online Search**,” the rest remain for you to create. Group sets may be expanded or collapsed (using the + and – symbols) to show or hide groups under each group set. Further, group sets may be renamed, deleted or even moved (to organize) by dragging the group set name in the Group panel.

### **EXERCISE** Creating a group set (Use the MyFirst Library for this exercise.)

1. From the **Groups** option on the menu bar, select “**Create Group Set.**”
2. Enter the name “**DRUG ABUSE**” for your group set and press [Enter].  
(NOTE: Capitalizing Group Set names will facilitate their discovery.)

### **EXERCISE** Moving a group to a group set (Use the MyFirst Library for this exercise.)

1. Left click on the “Treatment” group (keeping the button suppressed), drag the group over the newly created group set, “Drug Abuse” and release the mouse button.
2. The “Treatment” group should now be under its new parent group set. Groups added this way will automatically be sorted alphabetically.



3. Take a look at the Groups panel in the graphic on the left to see a more developed groups hierarchy of group sets and groups.

## Managing EndNote References

Citation and reference management systems are of little value if you can't easily and quickly find, manipulate and enhance the references collected and stored in your personal database. EndNote exceeds these fundamental requirements. Included among the many reference management features offered by EndNote are the following:

- intuitive navigation tools
- easy-to-use and efficient browsing tools, including up to 10 browsable fields from a selection of dozens
- a robust groups feature with which to organize references
- both a simple “Quick Search” tool and a more advanced search tool for finding references
- a marking tool to indicate which references have been reviewed or read
- a rating tool to indicate the importance of each reference
- a robust global editing tool with which to edit multiple references simultaneously
- a versatile duplicate detection tool that finds duplicates, highlights differences in duplicate references and enables easy editing and retention of the best parts of the duplicate references
- a full-text finding tool that automatically finds and attaches full text articles to references
- attachment tools that facilitate the attachment of full text articles and other documents (in PDF or other formats) to the corresponding references in your EndNote database.

## Navigating in EndNote

EndNote offers an incredibly versatile, configurable and productive window divisible by as many as five different panels, each with its own set of productivity tools. In the graphic below you see the EndNote window showing four panels: the Groups panel, the Reference List panel, the Edit/Preview panel and the Attachments/PDF panel. The Search panel is hidden. This panel was discussed earlier in the EndNote Online Search section. We will revisit the Search panel again when we cover the Advanced Search feature.

Because of the availability of so many panels you have multiple and convenient access points to your entire EndNote library. The Groups panel (previously covered on [page 4](#)) provides a broad and convenient way to organize and find your references by hierarchically arranged categories. The Reference List panel, on the other hand, provides a robust browsable organizing/finding tool to locate individual or similarly grouped references, e.g. by author, title, journal name or even by a rating scheme. Click on any of up to 10 column headers to toggle between alphabetical or numerical sorts in ascending or descending orders. Providing additional “individual” reference capabilities, the Edit/Preview panel enables both an edit function for any reference highlighted in the Reference List panel and an output style, e.g. APA or MLA, “preview” of any highlighted reference. And the Attachments/PDF panel enables both display and limited editing capability for any PDF linked to a reference highlighted in the Reference List panel.

The screenshot shows the EndNote application window with the following panels and features:

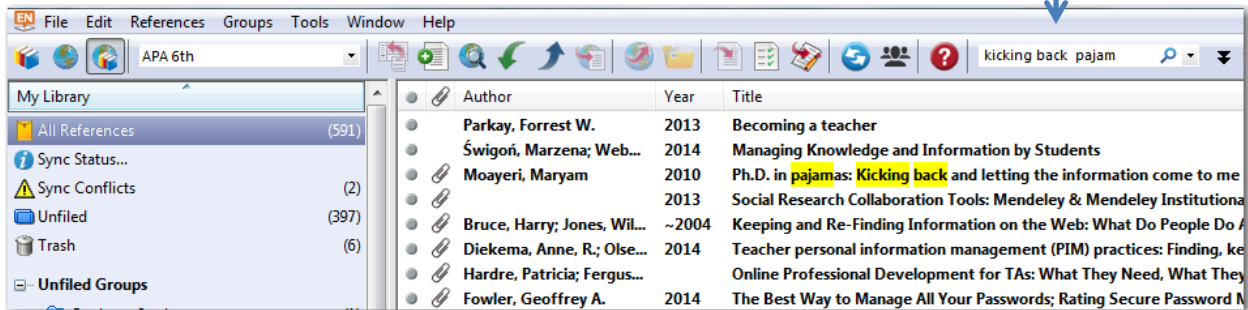
- Groups Panel:** Located on the left side, it displays a hierarchical tree of library groups such as 'All References (591)', 'Unfiled (397)', and 'ACADEMIC LIBRARIES/LIBRARIANS--FUT... (38)'. It includes sub-groups like 'ALERT Systems', 'Browsers', 'Catalogs', 'Databases', 'Discovery Tools', 'General Literature Searching', and 'Web Searching'.
- Reference List Panel:** The central panel displaying a list of references with columns for Author, Year, and Title. A blue arrow points to the '1 of 10 sortable fields' dropdown menu above the list.
- Edit/Preview Panel:** Located at the bottom left, it shows the details of a selected reference, including the Reference Type (Journal Article), Rating (4 stars), Author (Roscoe, L. J. McMahan), Year (2014), Title (Outcomes of Introduction to the Psychology Major: Careers and Opportunities Course), and Journal (Teaching of Psychology).
- Attachments/PDF Panel:** Located at the bottom right, it displays a preview of a PDF document titled 'Teaching of Psychology' by Roscoe, L. J. McMahan, published in 2014. The document content includes the title, author, year, and journal information.

The “Layout” option controls a wide range of panel configurations. It both closes panels and enables various panel configurations.

## Quick Searching

The Quick Search box, located on the EndNote menu bar, is a convenient and, you guessed it, “quick” tool for simple searches of your entire library. Use it to search for terms or phrases in all fields of all your EndNote references, and including PDF attachments. Multiple search words in the Quick Search box include implicit “AND” operators between each word.

**Quick Search box:** here a search is entered for the search terms “kicking back pajam.” Notice that the word “pajam” is not completely spelled out. Nonetheless, EndNote invokes an automatic truncation at the end all terms, thus retrieving both singular & plural forms and other possible variants of the word stem. In this example, EndNote found the article entitled, “ Ph.D in pajamas: Kicking back and letting the information come to me.”



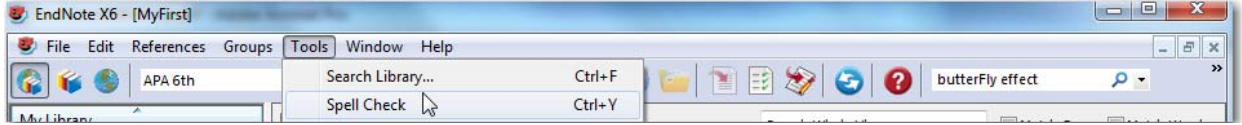
**NOTE:** For more complex searches, use the EndNote “Search Library” utility.

### **EXERCISE** Using the Quick Search box

1. Open the Sample library.
2. Use the Quick Search box to enter a search for the term “bat,” and then click on the magnifying glass icon or press the [Enter] key. **Note the number of references you retrieve. This number appears in the “Search Results group” in the Groups panel.**
3. Now conduct a second search for the phrase “bat flying free.”
4. Note the reduced number of references retrieved. (Note: the second search found only a single reference with the exact expression, “free flying bat.”)

## EndNote Search Library panel (for advanced searching of references in your EndNote library)

The EndNote “Search Library” utility, available from the **Tools** option on the EndNote menu bar

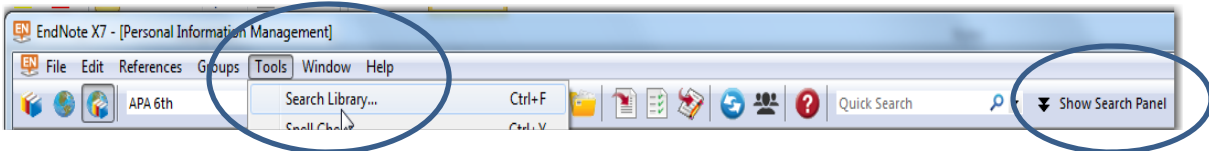


is a robust finding tool that provides you with comprehensive access to the references in your personal EndNote database. The “Search Library” utility includes the following functions:

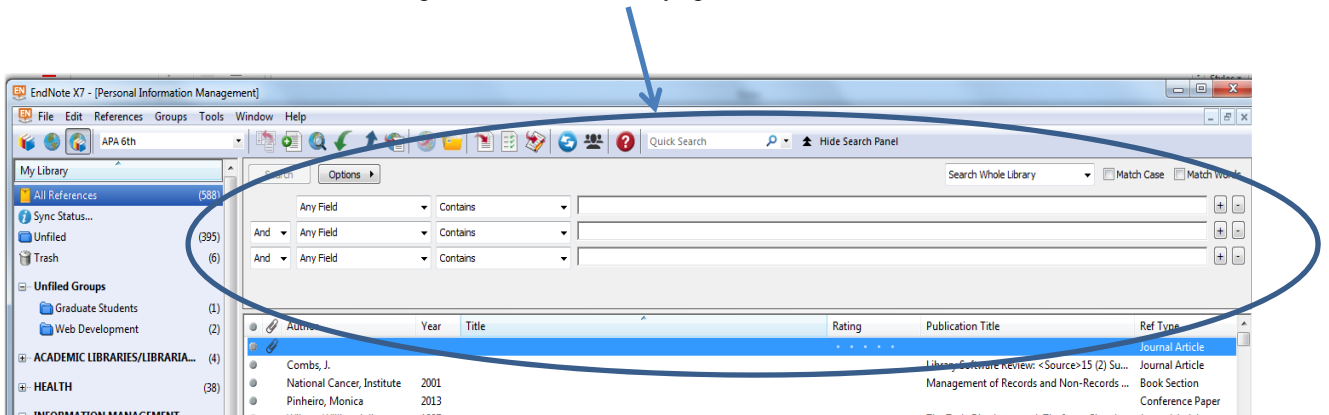
- searches for multiple concepts using Boolean operators
- searches the whole database or any part of it, including groups or temporarily created subsets of references
- optional search of readable PDF attachments, even including notes fields (your notes)
- can limit searches to specific fields, e.g., author, title, abstract, etc.
- can add additional search text boxes
- can match case
- can save searches or invoke saved searches
- can convert searches to “Smart Groups”

The Search Library panel may be opened with 3 different commands:

- Select **Tools** from the menu bar, and then select “**Search Library.**”
- Press [**Ctrl**] **F**.
- From the EndNote menu bar, click on the [**Show Search Panel**].

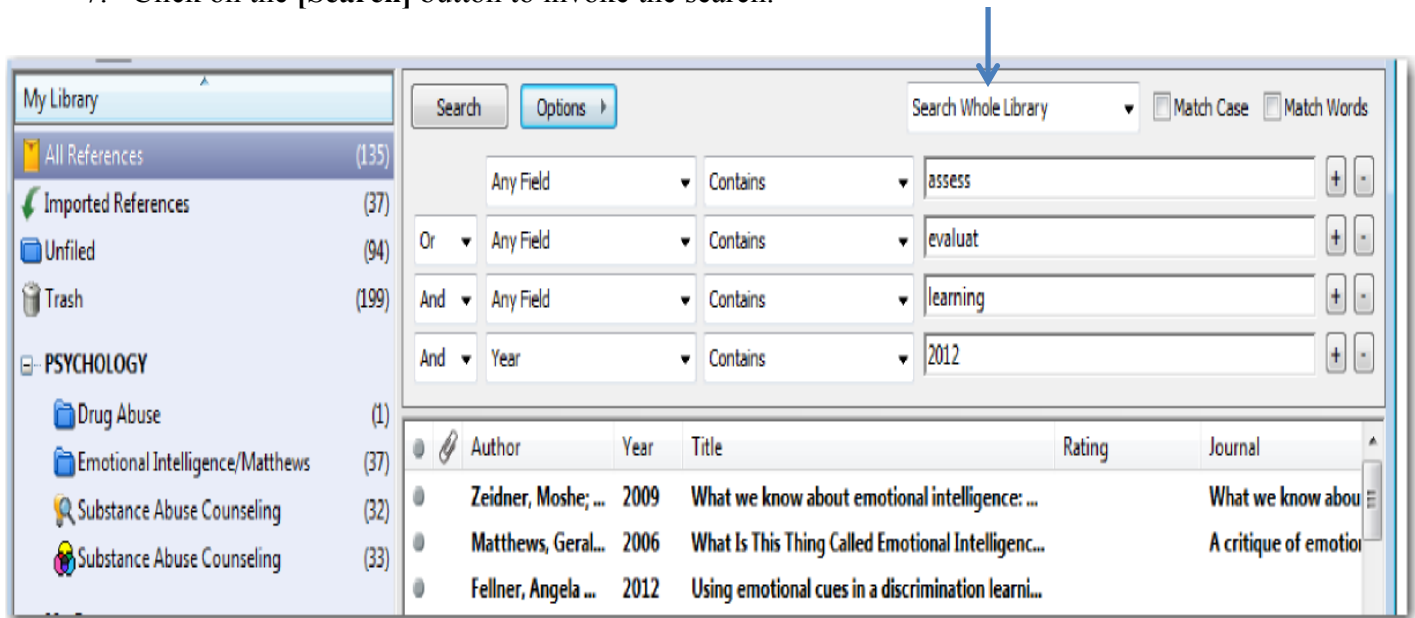


Using any of the 3 methods listed above will open the “Search Library” panel below.



**EXERCISE** Using the Search Library utility to search the MyFirst Library  
(NOTE: Complete the PsycINFO exercise on page 11 prior to conducting this exercise.)

1. Open the “MyFirst” library and open the Search Library utility by clicking on **Tools** on the EndNote menu bar and then clicking on “**Search Library.**” (Note: Be sure you select “**Search Whole Library**” (see arrow below) because the search may default to a preselected “**group**” of references. You may have to select the “**All References**” group to ensure you are searching your entire library.)
2. Enter the term “**assess**” in the first text box and set the [Field box] to “Any Field.”
3. Enter the term “**evaluat**” in the second text box, set the [Field box] to “Any Field” and set previous Boolean operator to “OR.”
4. Enter the term “**learning**” in the third text box, set the [Field box] to “Any Field” and set previous Boolean operator to “AND.”
5. Enter the phrase “2012” in the fourth text box, set the [Field box] to “Year” and set the previous Boolean operator to “AND.”
6. Your search query should look like the search query in the image below.
7. Click on the [**Search**] button to invoke the search.



**TIP:** The Search Library utility uses top-down processing of search statements. That is, each search statement (line) works on the results of the previous search. When mixing AND and OR operators, “always” put the OR operators first.

## Marking as “Read” or “Unread” and Rating References

As you may have surmised by now, EndNote provides you with a wide range of discovery tools for organizing and, more importantly, finding references in your EndNote library. That is, found references, those added to your library, stay found. The use of groups, the nearly endless capabilities for browsing your references (via all the columns in the Reference List panel) and the quick and advanced search tools all facilitate quick and accurate recall of whichever references you need.

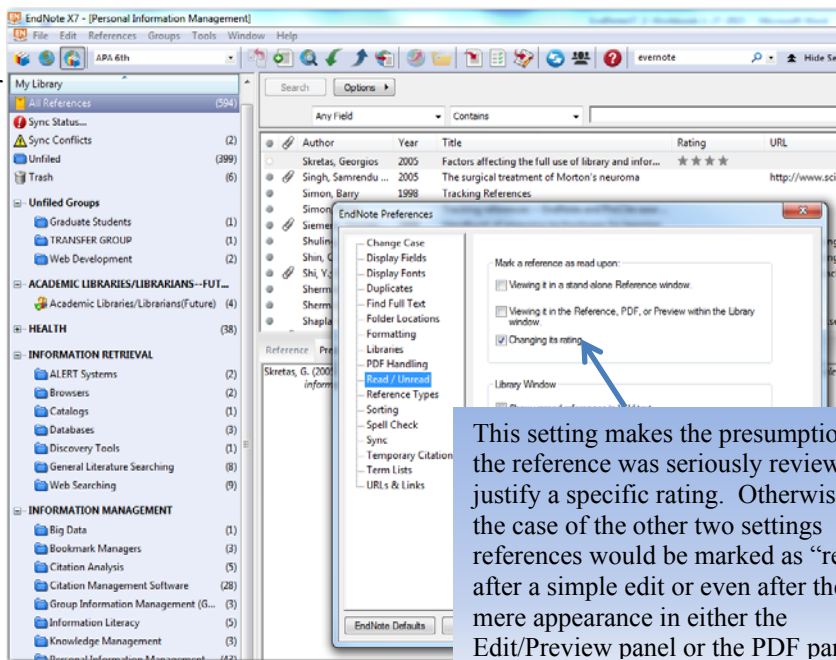
Not enough? EndNote recently added another useful tool to its suite of discovery tools: the read/unread and rating feature. These two functions work most effectively in concert with each other. Used together, references can be distinguished from each other by acquiring a status of either “read” or “unread” and earn a rating of from one to five stars. You would determine the rating continuum, i.e., whether “1 star” or “5 stars” would be the highest rating.

### **EXERCISE (1) Establishing the Read/Unread and Rating Relationship**

1. Open the EndNote Sample library.
2. Click on **Edit** on EndNote menu bar and then click on **“Preferences.”**
3. Select **“Read/Unread.”**
4. Make sure that the **“Mark as read upon rating change”** is the only box checked.
5. Click on [OK] to save the change.

### **EXERCISE (2)**

1. Select any reference in the EndNote Sample library, right click on the reference and select a 4 star rating. NOTE that the reference now is marked as “read” (an unfilled circle).
2. Select another reference, right click on the reference and select a 2 star rating. This reference also acquires the “read” status.
3. Click on the “Rating” column header a couple of times and notice that the sort order of all of the references toggles from highest to lowest rated.
4. Similarly, click on the “Read/Unread” column header and notice how the sort order toggles between “read” and “unread” references.



## Show and Hide Selected References for Global Editing

The “Show References” and “Hide References” commands are EndNote tools used to include or exclude references in the Reference List panel to facilitate myriad operations used to globally edit, manage, display or output references. Many of EndNote’s global editing and other reference management tools work with the references that are “showing” and not necessarily the references you may have “highlighted.” For example, if you have 20 references “showing” in the Reference List panel and 10 of those references are highlighted, for whatever reason, and you invoke a global edit to add a piece of information to the database fields of these references, all of the “showing” references will be changed -- not just the “highlighted” references.

### **EXERCISE Using the “Show References” command for a global edit**

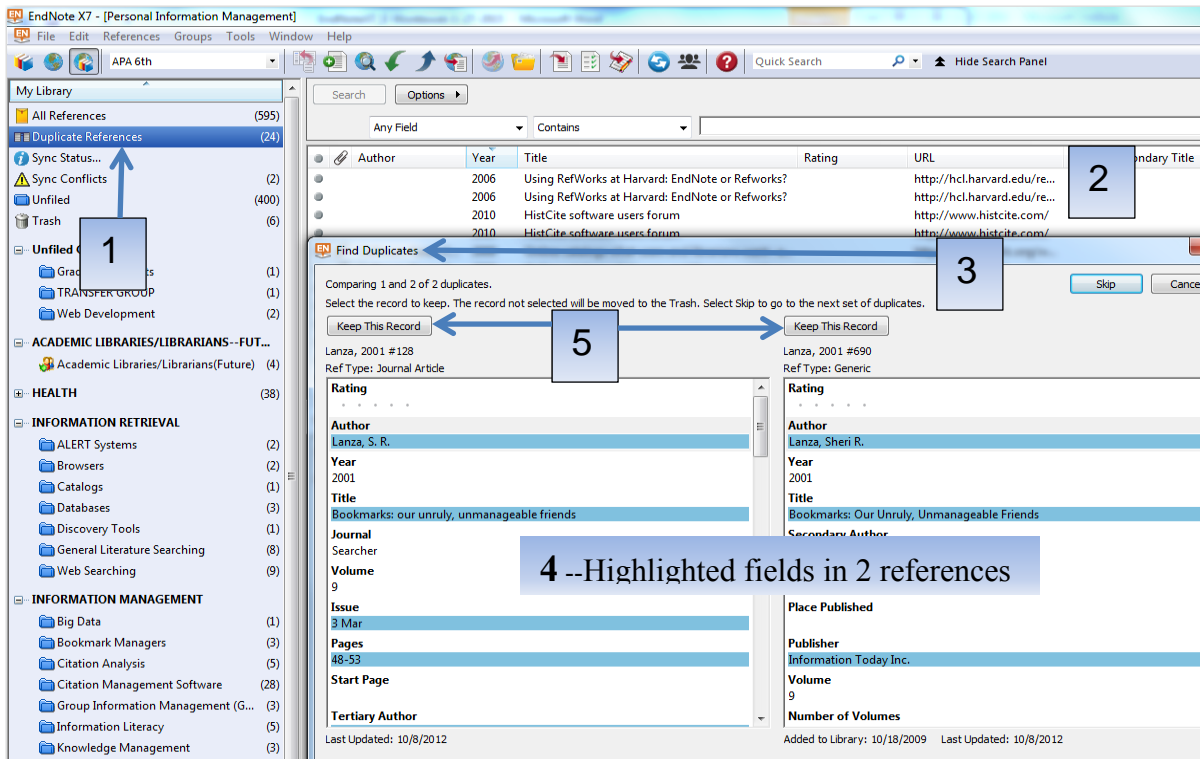
1. Open the MyFirst Library
2. Select the “All References” group.
3. Sort the references by Record # in descending order, giving you a sort from which you can easily identify the most recent references added to your library.
4. Select the most recently added 8 references. (the References from the [RefWorks exercise](#))
5. Click on **References** from the EndNote menu bar, and then click on **“Show Selected References.”**
6. Click on **Tools** from the EndNote menu bar, and then click on **“Change/Move/Copy Fields.”**
7. After **“In:”** select the **“Research Notes”** field and then select **“Insert after field’s text:”**
8. Click inside the text box and enter “RefWorks Refs from Dr. Richards” and click on **[OK]**.
9. A confirmation window will appear from which you can opt to cancel. Click on **[OK]**.
10. Another confirmation window will appear; click on **[OK]** again.
11. Open a reference or two (by double clicking) to review how the new information appears. You will need to scroll down the reference to view the “Research Notes” field. Close the reference to return to the Reference List panel.

## Managing Duplicate References

As you increase the size of your personal EndNote library it is almost inevitable that you will encounter duplicate records, particularly if you electronically add references to your database from multiple research literature databases. Duplicate references are wasteful, both in terms of time and space.

EndNote facilitates the management of duplicate references through two mechanisms: the “Import” tool and the “Find Duplicates” tool. The Import tool, which detects duplicates “before” they enter your database, was discussed in a [previous section](#). The “Find Duplicates” tool identifies duplicates already in your database, references that entered your database most likely via the “Export” process, i.e. directly from a research literature database.

The “Find Duplicates” tool finds duplicate references based on matches in the following default fields: author, year, title and reference type. It is possible and sometimes necessary to both add and subtract fields to the EndNote comparison table that is used to identify duplicates. If EndNote finds any duplicates, a “Duplicate References group” for these duplicate references is created in the Groups panel (1), the duplicate references are displayed in the Reference List panel (2) and EndNote simultaneously opens a “Find Duplicates” window (3) over the Reference List panel that places a pair of “open” duplicate references side-by-side for easy comparison. Differences in the duplicate references are highlighted (4). See the image below.



Once you have identified duplicate references you must decide which reference to “keep.” Select the reference you wish to keep by pressing the [Keep This Record] button (5). See image above. **However, be careful with this choice.**

It is not always the most recent reference that you will want to eliminate. There may be several considerations:

- which record is the most **accurate**
- which record is the most **complete**
- does one of the records have an **attachment**, e.g. PDF full text article
- is one of the records already used as in **in-text citation** in your paper or manuscript, in which case you must retain this record or replace the reference in your paper/manuscript with the record you elect to keep

Ensuring you have both the most **accurate and the most complete record** (1<sup>st</sup> two bulleted items) is easy. While both records are displayed side-by-side, you can simply copy and paste information into either record to “build” the most accurate and complete reference, discarding the other reference to the “Trash” group.

If one record has an **attachment** and the other record does not, and you elect to “Keep” the duplicate without an attachment, you will have to reattach the attachment to the record you elect to keep.

If you already have used one of the duplicate references as an **in-text citation** in your paper or manuscript, you must either “Keep” the record in your paper/manuscript or you will need to delete that record from your paper/manuscript and replace it in your paper/manuscript with the record you elect to keep.

### **EXERCISE Search for duplicate references in your MyFirst database**

**NOTE:** For this exercise 1) Select **Edit** from the EndNote menu bar, 2) then select **Preferences**, 3) then select **Duplicates**, 4) then remove the “check” from the “Author” box and click on **[OK]**.

**After the exercise put the “check” back into the “Author” box.**

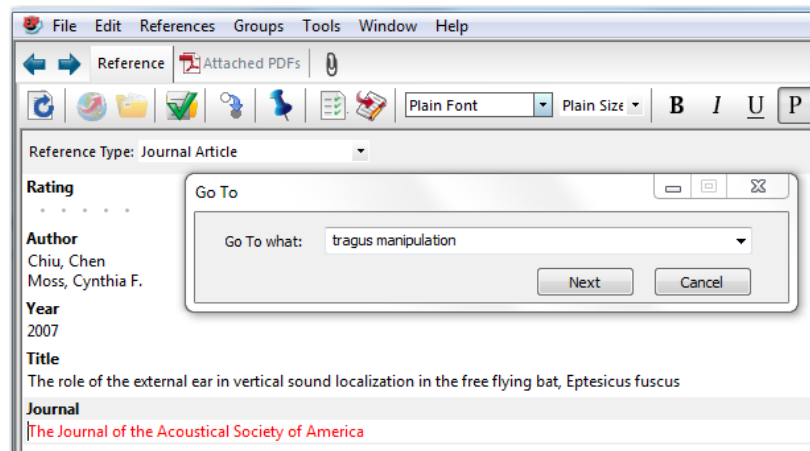
1. Open the “MyFirst” library.
2. Click on any single reference to highlight it.
3. Right click on that reference and select “Copy.” (**Pay attention or even write down the name of the first author or the reference.**)
4. Click anywhere on the Reference List panel and then right click and select “Paste” to paste a copy of the previously copied reference to your list of references. You now have a duplicate reference.
5. Click on the “Author” column header to sort your references by author. Note that the original reference and copied reference appear next to one another.
6. Open one of these two references (double click on the reference), click your mouse in the “Author” field, hit the **[Enter]** key and then add the author “**Bogus, Alfred.**”
7. Close the reference.
8. Select **References** from the EndNote menu bar, and then select “**Find Duplicates.**”
9. Note that in the Find Duplicates window the “Author” fields are highlighted because a “difference” exists in these two fields.
10. Select the **[Keep This Record] button** for the reference without the added authors name.
11. The Find Duplicates window will close unless additional duplicates exist in your library.
12. **NOTE** that if no duplicates are found, EndNote will display a window indicating “No duplicate references found.”

## Finding text in a single reference

EndNote provides the “Go To” utility to find text in individual EndNote references. This is a particularly useful feature for finding words or phrases in large references. The “Go To” utility does not search full-text attachments.

### **EXERCISE** Finding text in a large reference

1. Open the Sample Library ,and then find and open (double click) the “Chiu” reference in *The Journal of the Acoustical Society of America*.
2. Invoke the “Go To” utility by clicking on **References** on the menu bar and then selecting “Go To” to invoke the “Go To” box. (see below)
3. Enter the expression “**tragus manipulation**” and click on the [Next] button.
4. The expression ”tragus manipulation” will be highlighted for easy identification.



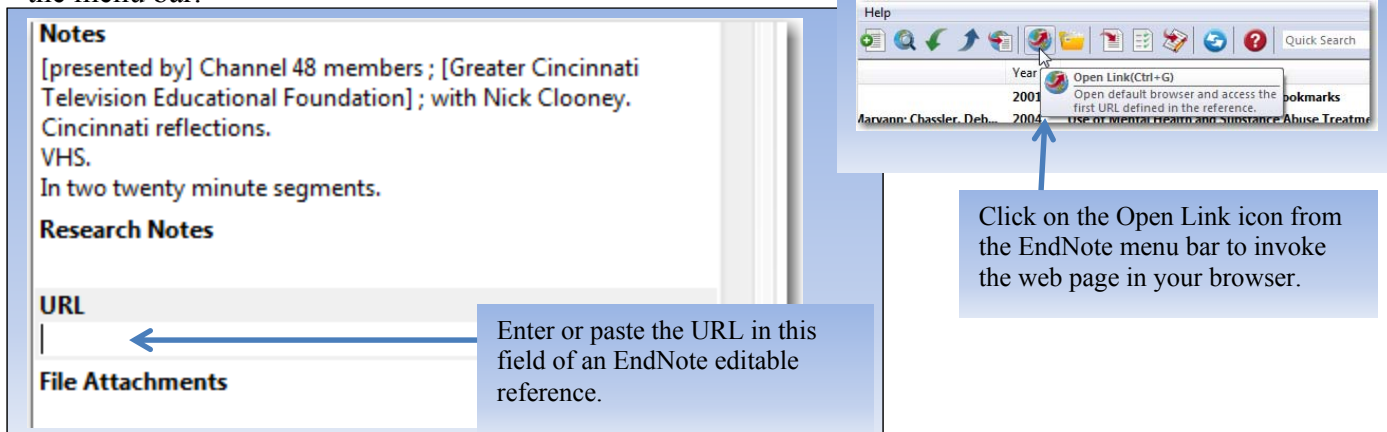
## Managing Full-Text Records

EndNote offers a variety of tools to collect and manage full text documents and miscellaneous file attachments to your EndNote references. Therefore, your EndNote library of references can also become a library (personal database) for your full text collection of articles. What follows is a list of EndNote features (tools) to assist your collection and management of full text documents. Each feature is covered in detail, in many cases including recommended settings.

- Link directly to a persistent URL to access Websites, including full text documents
- Connect to the UC Libraries' openURL syntax server to access full text journal articles
- Manual attachment of PDFs and other file types
- PDF import utility (previously covered on [pages 29 - 30](#)) to import and create new references and attachment of full text records to EndNote references
- Find Full Text utility for automatic finding, downloading and attachment of full text articles to EndNote References

### Linking to a URL

Any EndNote reference can link to one or even multiple URLs (web addresses) to access web sites, articles or a wide range of documents. To add a URL to a reference simply type or copy and paste a URL address into the URL field in the EndNote reference. To open the link, use the Open Link tool on the menu bar.



### **EXERCISE Link to a URL (articles, web pages, miscellaneous documents)**

1. Open the Sample Library, select the "All References" group and double click on the "Binfield" reference to open the editable record, and scroll down to the URL field.
2. **Surprise!** The URL address is already entered, but you do see where the URL would go.
3. Close the reference.
4. Highlight the "Binfield" reference.
5. Click on the "**Open Link**" tool (see above image on right) on the EndNote menu bar to invoke the web page.

## Linking to articles and journals via UC's OpenURL server

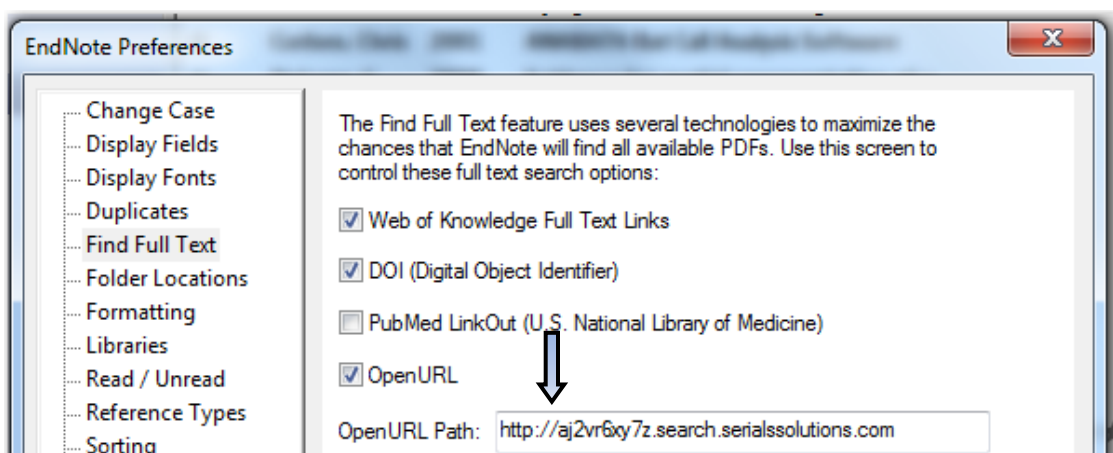
To connect to the UC Libraries' electronic full text journal collection, you must configure EndNote to access the University of Cincinnati Libraries' openURL server. Use this function to find full text articles via UC's openURL server, and then go to the "**Linking a File**" section of this workbook to learn how to attach full text articles to the references in your EndNote library.

### **EXERCISE** Setting up the OpenURL syntax service


1. Select **Edit** from the EndNote menu bar, select "**Preferences**" and then select "**Find Full Text.**"
2. In the EndNote Preferences dialog box put a check in the "**OpenURL**" box, and then put the following URL address (copy/paste will reduce errors) into the "**OpenURL Path**" box:  
<http://aj2vr6xy7z.search.serialssolutions.com>

(**Note:** You will replace any address that might already be in the "OpenURL Path" box.)

3. Click on [**OK**] to confirm this new setting.



### **EXERCISE** Find an article using the UC Libraries' openURL server

1. Open the Sample library and highlight the article by "**DeLong.**"
2. Select **References** from the EndNote menu bar, and then select **URL**.
3. Select "**OpenURL Link**" to open the UC Libraries "UC Article Linker" window. (This is the UC openURL server.)
4. Select the "**Article**" link across from "OhioLINK Electronic Journal Center."
5. From the **EJC** window, click on **the title link for this article** to move to the window to retrieve the full text article.
6. Finally, click on  to retrieve the full text article.

## Linking a file (including a PDF) to an EndNote reference

There are two ways to “automatically” attach full text articles as PDF files to EndNote References:

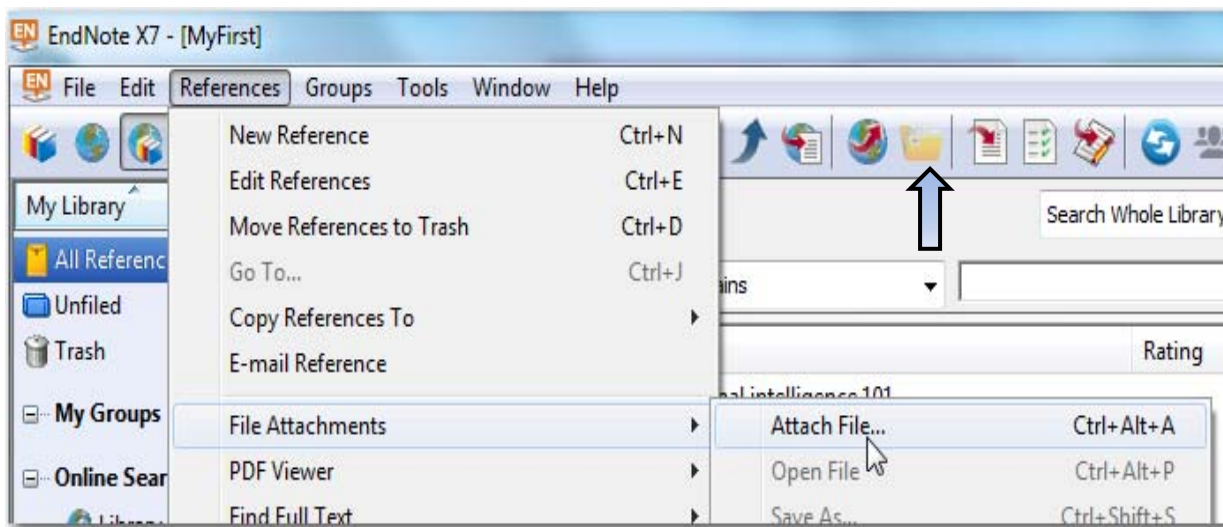
- Importing a folder of PDF files or by importing a single PDF file (**covered on pages 29 - 30**)
- Using the “**Find Full Text**” utility (**pages 52-53**)

Both of these options can conveniently and quickly attach a significant number of full text articles to your EndNote references. However, if neither of these utilities is either appropriate or effective for this operation, EndNote provides a simple manual procedure to attach documents, e.g. full text articles, to EndNote references, the “Attach File” command.

Using the Attach File command you can link a file (e.g., a Word document, a spreadsheet, a graphic and especially a PDF full text article) to any EndNote reference. To add an attachment you must either highlight a reference in the EndNote “Reference List” panel or open a reference in edit mode.

### **EXERCISE Link to and open a PDF article for an EndNote reference**

1. Open your MyFirst library, select the “All References” group and highlight the *Praslova* reference.
2. Select **References** from the EndNote menu bar, and then select “**File Attachments**,” and then select “**Attach File**.”
3. For this exercise, locate and select the “**PraslovaArticle**” file from the EndNote Folder and click on **[Open]**.
4. Then click on any other reference and then click on “**Yes**” to save this change
5. To verify the attachment, highlight the Praslova reference. The PDF article will appear in the PDF Viewer panel.



**TIP:** See page 72 of the *EndNote X7 Users' Guide* to help you determine whether you should create a “relative” path or an “absolute” path to your EndNote references. I recommend you that you use a “relative” path for the simple reason that all of your attachments will be stored in the EndNote “Data” folder that corresponds to your EndNote library, and both your EndNote library and Data folder can be easily backed up with “Compressed Library” command available under [File] on the menu bar.

## Find Full Text

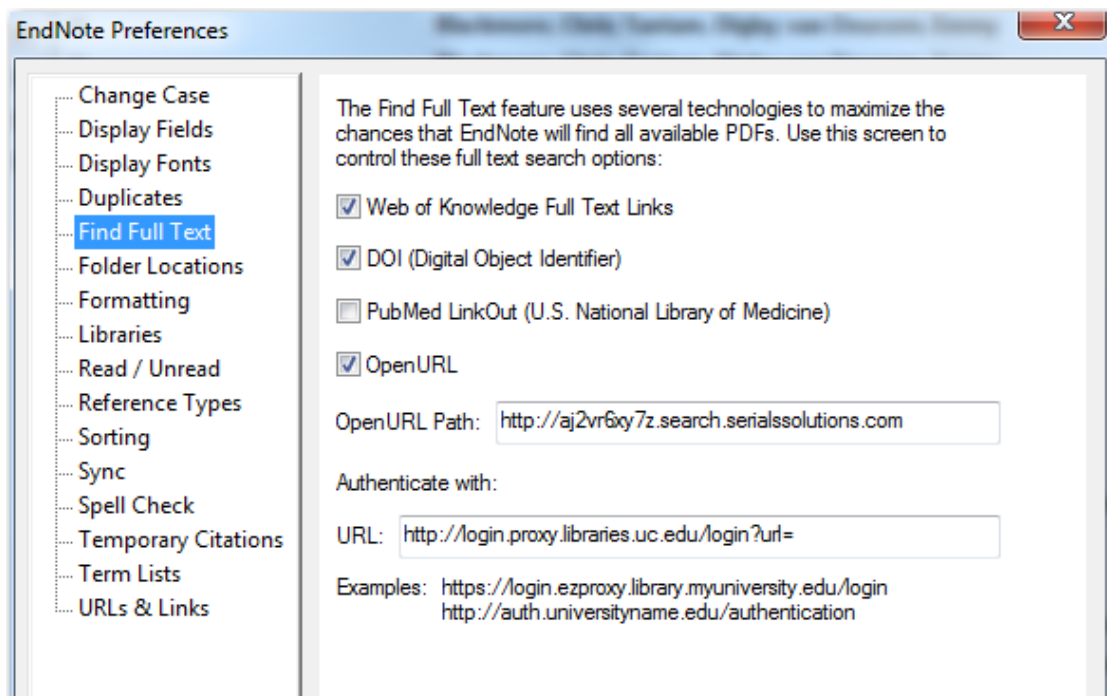
Talk about a time saver -- EndNote's "Find Full Text" feature is designed to search for, identify, retrieve and attach full text articles to your EndNote references, saving you countless hours of time if you were to perform these same tasks manually. Complete the following exercises to optimize your Find Full Text configuration and to learn how to use the Find Full Text feature.

### **EXERCISE** Configuring the Find Full Text Preferences

1. Select **Edit** from the EndNote menu bar, select "**Preferences**" and then select "**Find Full Text.**"
2. In the EndNote Preferences dialog box put a check in the following boxes: ISI Web of Knowledge..., DOI... and OpenURL. (See below.)
3. Put the following URL address (copy/paste will reduce errors) into the "**OpenURL Path**" box:  
<http://aj2vr6xy7z.search.serialssolutions.com>

(**Note:** replace any address that might already be in the "**OpenURL Path**" box.)

4. Under the expression "Authenticate with," enter the following address in the URL box:  
<http://login.proxy.libraries.uc.edu/login?url=>  
(NOTE: this 4<sup>th</sup> step is unnecessary if you always start the remote access [VPN](#) service before you invoke the **Find Full Text** command.)
5. Click on [OK] to save these settings.



**EXERCISE Find, retrieve and attach full text articles for several EndNote references simultaneously**

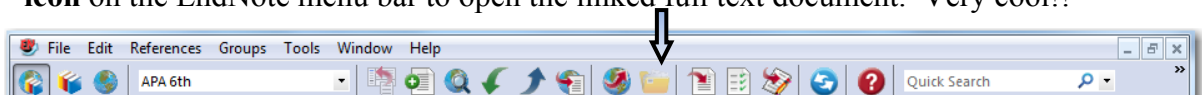
1. Open your MyFirst library.
2. Select the “All References” group.
3. Click on the “Reference Type” column header to create a sort that will place all of the journal references together.
4. Select (highlight) any 10 journal references. (Remember – hold down the [Ctrl] key to select non-consecutive references.)
5. Click on **References** from the EndNote menu bar, and then click on “Find Full Text,” or alternatively click on the “Find Full Text” icon on the menu bar. Either of these commands invokes the “Find Full Text” process. (NOTE: For off-campus ac

**TIP:** During the process of finding full text, results are continually posted under the “Find Full Text” group SET. Four temporary groups may appear as you can see in the graphic below.

Group Name	Count
Searching...	8
Found PDF	2
Found URL	2
Not found	1

The “**Searching**” group is deleted once all references have been searched. (This is how you will know the process is completed.) The “**Found PDF**” group reflects the number of full text items found. The “**Found URL**” group includes references for which no PDF was found but a URL was identified, and the “**Not Found**” group includes references for which nothing was found. The graphic on the left shows a possible result from this exercise.

6. You may have to enter your UC central login information, but after completing that process EndNote will begin the full text search and create the various Find Full Text processing groups. (See image above, on right)
7. The references for which you retrieved full text files have become part of the temporary “Found PDF” group. Notice that all these references now show the attachment icon (paper clip) in the Reference List panel.
8. Highlight any one of these references with the paper clip icon, and click on the “Open File” icon on the EndNote menu bar to open the linked full text document. Very cool!!



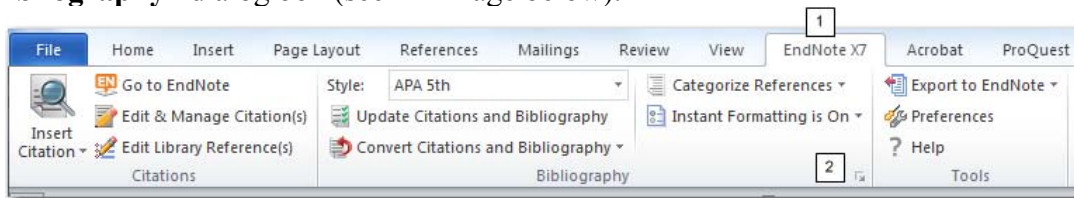
# Cite While You Write with MS Word

EndNote's Cite While Your Write (CWYW) is an auxiliary manuscript production utility. With CWYW you can format in-text citations, bibliographies, figures or tables in thousands of different output styles. EndNote version X7 is compatible with Word 2007, Word 2010, Word 2013 and OpenOffice.org Writer 3. **(The exercises in this workbook are based on Microsoft Word 2010.)** EndNote's installation program automatically installs the CWYW utility for Microsoft Word.

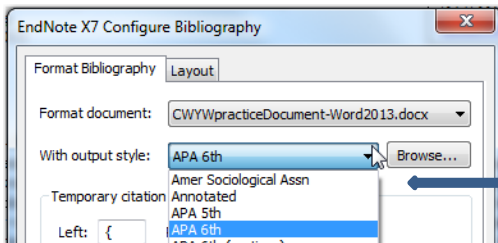
For additional information about using CWYW with OpenOffice.org Writer, version 3, see page 384 of the *EndNote X7 User Guide*. For all other word processor programs documents may be saved in RTF format. The *EndNote X7 User Guide* provides basic instruction for formatting papers using RTF format on page 401.

## **EXERCISE** CWYW with MS Word (using references from the MyFirst database)

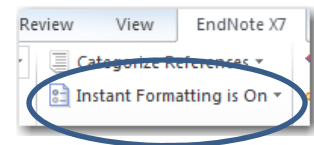
1. Open the file “CWYW practiceDocument-Word2013.doc” in the EndNote folder.
2. Click on the “EndNote X7” tab [1] (see below) to display the CWYW menu options.
3. Click on the small arrow [2] under ”Instant Formatting ...” to invoke the “EndNote X7 Configure Bibliography” dialog box (see 2<sup>nd</sup> image below).



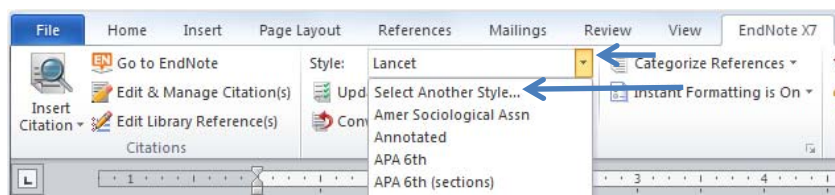
4. Select “APA 6<sup>th</sup>” for your output style, and click on [OK] to close the box.
5. On the EndNote menu bar, make sure the “Instant Formatting” is turned “On,” (below).



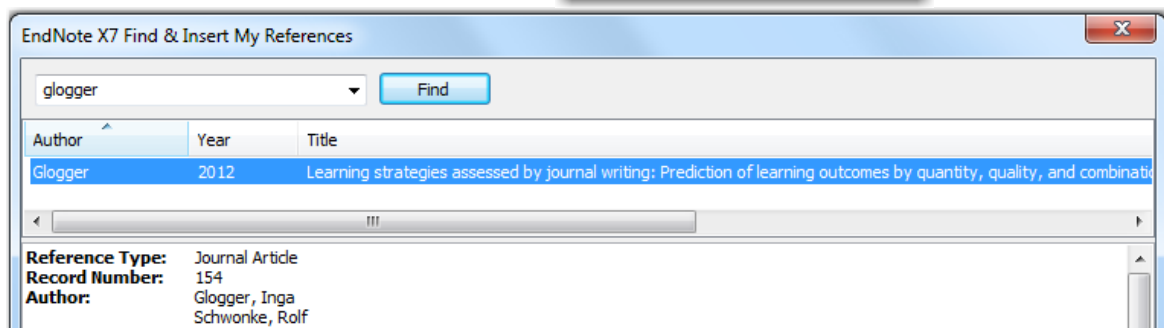
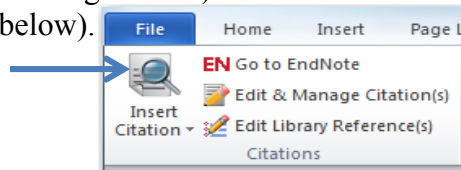
The output styles listed here come from your selections of output styles in the “Bibliographic Output Style” box on the EndNote menu bar.



**TIP:** If you need to add an output style that is not included in the drop down list in the Configure Bibliography box (above), click on the down arrow across from “Style:” on the EndNote menu bar (below). Then click on “Select another Output style” to open the “EndNote X7 Output Styles box and select the style you need.



6. Place your cursor just after “**Glogger**” in the **1<sup>st</sup> paragraph** of the CWYW practice document. Add a single space to separate the text from the in-text citation.
7. Click on the “**Insert Citation**” icon (1<sup>st</sup> image below) to invoke the “**EndNote X7 Find & Insert My References**” window (2<sup>nd</sup> image below).



8. Enter “**Glogger**” into the Find box and press the **Find** button or **[Enter]** key on your keyboard. (Note: you will need to **highlight** the relevant cited article if more than one reference appears.)

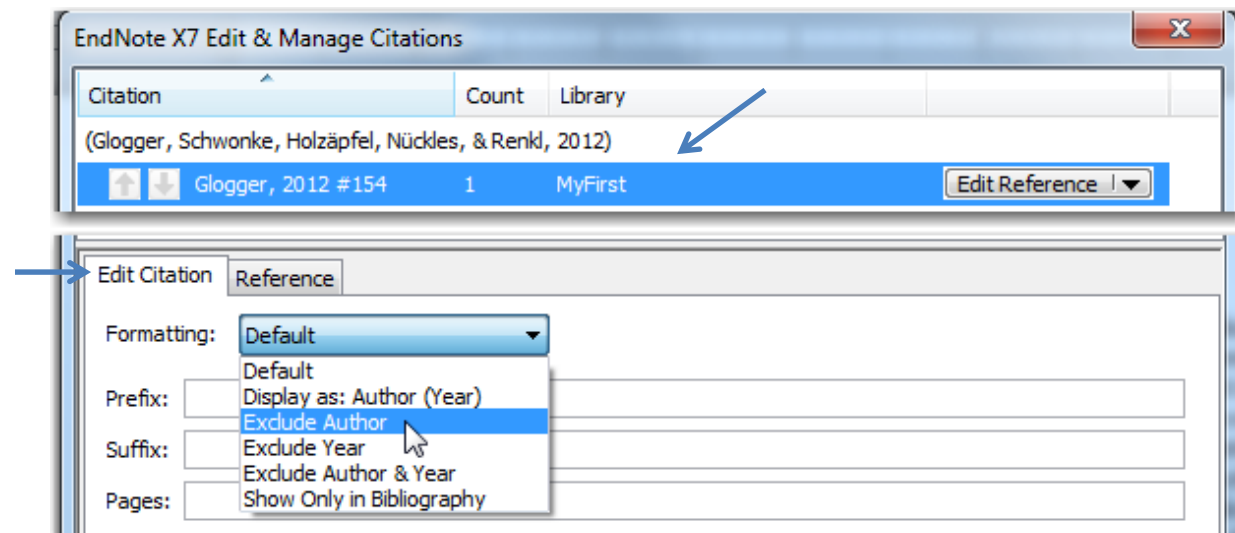
**TIP:** Make sure the EndNote library is open that contains the references in your manuscript. Also, when searching for references in the Find box, note that a specific search is more efficient than a general one. For example, if our search for the “Glogger” reference, resulted in multiple hits, we could easily add a word from the article title (e.g., “glogger learning”) to narrow our results. EndNote combines multiple terms with the Boolean operator AND, thus requiring all search terms be found in retrieved references. Alternatively, if a reference includes multiple authors, search for the author name that is the **most unique**.

9. Click on the **[Insert]** button to place the citation into the manuscript text and to create the corresponding bibliographic citation into the bibliography.
10. Place your cursor at the end of the 2<sup>nd</sup> paragraph (just before the period). Again, add a single space to separate the text from the in-text citation.
11. Click on the “**Insert Citation**” icon to invoke the “**EndNote X7 Find & Insert My References**” window.
12. Enter “**Burle**” into the Find box and press the **[Find]** button. **Highlight** the article by **B. Burle** about “high speed memory scanning.”
13. Click on the **[Insert]** button to place a citation into the text and to create the corresponding bibliographic citation into the bibliography.
14. Place your cursor at the end of the 3<sup>rd</sup> paragraph (just before the period). Again, add a space.
15. Click on the “**Insert Citation**” icon to invoke the “**EndNote X7 Find & Insert My References**” window.
16. Enter “**Burle**” into the Find box and press the **[Find]** button. **Highlight** the article, “Response selection in a four choice task.”
17. Click on the **[Insert]** button to place a citation into the text and to create the corresponding bibliographic citation into the bibliography.

18. Place your cursor at the end of the 4<sup>th</sup> paragraph (just before the period). Again, add a single space to separate the text from the in-text citation.
19. Click on the “**Insert Citation**” icon to invoke the “**EndNote X7 Find & Insert My References**” window.
20. Enter “**Posner**” into the Find box and press the [**F**ind] button. **Highlight** the article by **Michael Posner**.
21. Click on the [**I**nsert] button to place a citation into the text and to create the corresponding bibliographic citation into the bibliography.
22. Place your cursor anywhere on the **Posner citation**.
23. Click on the “**Insert Citation**” icon to invoke the “**EndNote X7 Find & Insert My References**” window.
24. Enter “**Praslova**” into the Find box and press the [**F**ind] button to retrieve the article by **Ludmila Praslova**.
25. Click on the [**I**nsert] button to place a citation into the text and the corresponding bibliographic citation into the bibliography. (Note: EndNote integrates the citations puts them in alphabetical order to comply with the APA style guide.)

### Corrections & Adjustments to Citations

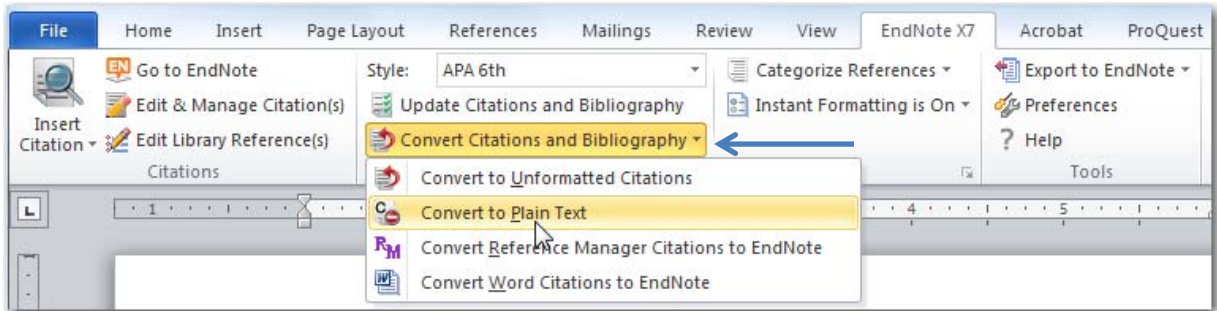
Occasionally (depending on your circumstances and output style rules) you will need to amend a citation, e.g., suppress an author’s name or add a note to the citation. On these occasions you will use the Edit & Manage Citation(s) option (CWYW menu) to invoke the window below.



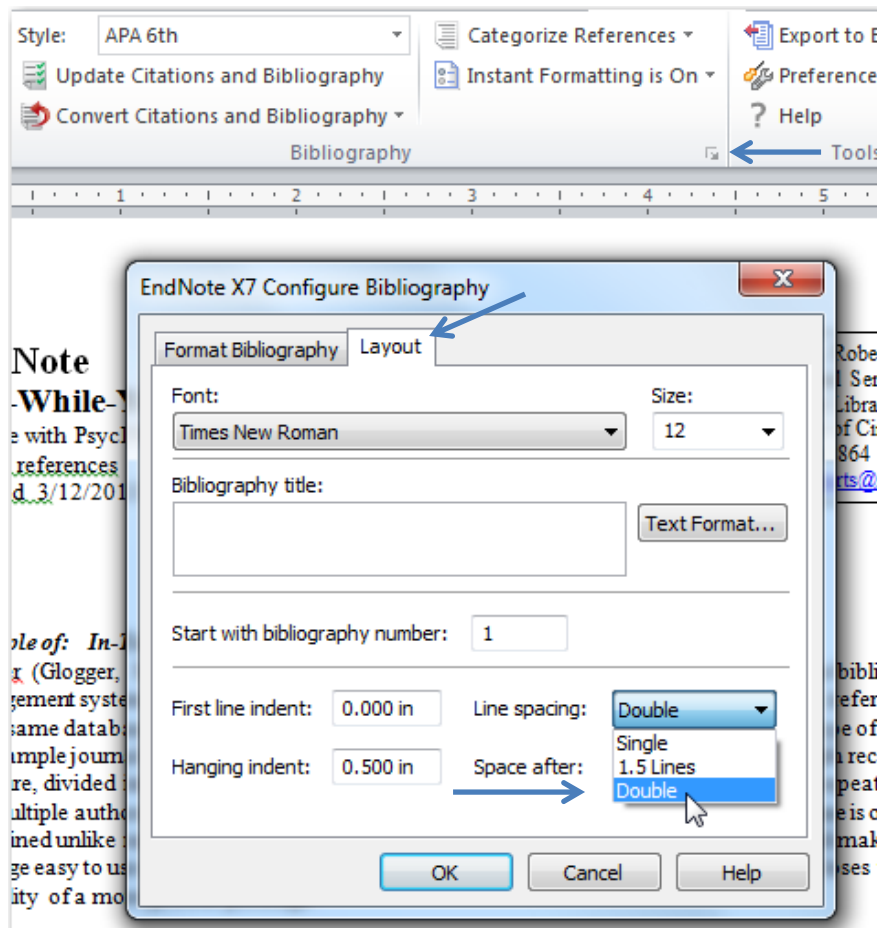
26. Return to the “Glogger” citation in the 1<sup>st</sup> paragraph, and place your cursor over the citation.
27. Click on the **Edit & Manage Citation(s)** option from the CWYW menu; click on the “Edit Citation” tab and then click the down arrow across from “Formatting.”
28. Select “**Exclude Author**” and then click on [**O**K] to permanently remove the author’s name from the in-text citation. (Note: this is an APA rule for author’s names that appear in the narrative of the article.)

**TIP:** Never edit your citations with Microsoft Word. Editing with Word will not amend the “code” associated with the citation, and the text of the citation will automatically revert to its original state.

29. Publishers prefer that you remove the field codes from your document created via EndNote. To remove the field codes, click on **“Convert Citations and Bibliography”** and then click on **“Convert to Plain Text.”** A dialog box will appear to inform you that a copy of your document will be made and your original document (with field codes) will remain open. **Click on [OK].**



**TIP:** For APA style you will need to set the bibliography for double spacing. Click on the bibliography diagonal arrow to open the **“Configure Bibliography”** box, then click on the **“Layout”** tab and then change the **“Line spacing:”** to **“Double.”** Click on **[OK]** to confirm the changes.

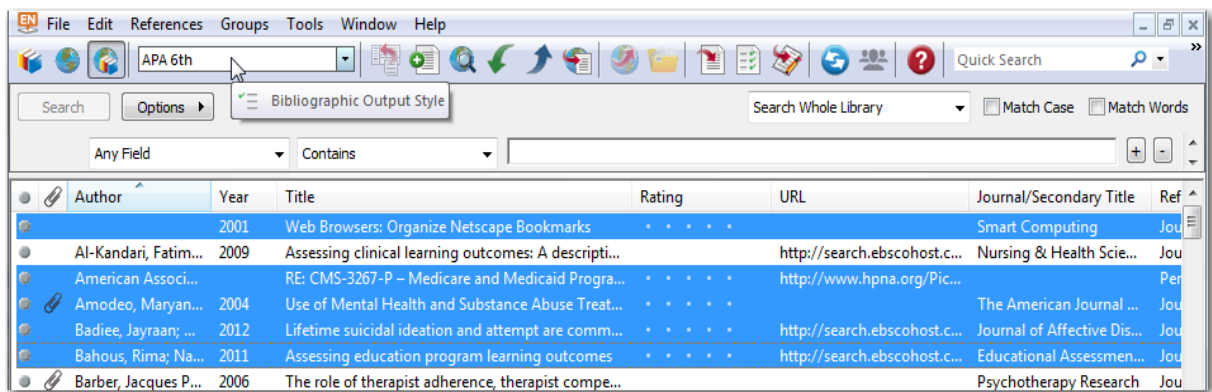


# Creating Independent Bibliographies

There may be occasions when you need to create a bibliography that is not associated with a manuscript. EndNote refers to these bibliographies as “independent bibliographies” because they have no relationship to citations in a paper. EndNote provides four different ways to produce these types of bibliographies (pages 415 – 418 in the *EndNote X7 User Guide*). The exercise below uses the “copy formatted” procedure.

## **EXERCISE** Create a bibliography from your MyFirst library

1. Open your MyFirst library.
2. From the “Output styles favorites” box (see arrow), select the APA 6<sup>th</sup> output style.



3. Select (highlight) any 5 references from the EndNote References List panel. (Note: Suppress the [Ctrl] key and simultaneously left click you your mouse to select either consecutive or nonconsecutive references.)
4. Right click your mouse over these references, and select “Copy Formatted” to copy the references.
5. Open a document in your word processor, place the cursor where you want the references to appear and paste the references to your document.

**TIP:** Regardless of the order in which you select these references from your EndNote library, the references will be sorted and formatted according to the rules of the output style you select.

# EndNote Online

EndNote Online provides EndNote desktop users with an increasingly robust online collaborative tool, and **ALL** UC students, faculty and staff are authorized to register for a free institutional EndNote Online account. EndNote Online is a capable independent (stand-alone) citation and reference management tool. However, as a companion tool to EndNote desktop, it adds a significant number of capabilities to the desktop EndNote product. EndNote Online provides EndNote desktop users the following additional citation & reference management capabilities:

- a synchronization utility that creates an online copy (essentially a backup) of your desktop EndNote library, including groups and full text attachments
- 24/7 remote access to your EndNote library, including groups and full text attachments
- access to your EndNote library on multiple devices: desktop, online & [iPad](#)
- a group sharing feature that enables EndNote desktop users to share their references via EndNote groups with an unlimited number of EndNote Online users (see the next section on **“EndNote Sharing & Collaboration features.”**)
- downloadable Capture utility that retrieves both single or multiple references directly into your EndNote Online library through a browser

## Setting up your EndNote Online account

Back up your EndNote desktop library first.

### **EXERCISE Create a backup copy of your EndNote desktop library**

1. Click on **File** from the EndNote menu bar and then select **“Compressed Library (.enlx).”**
2. In the “Compressed Library dialog box leave all the default settings as is to back up your entire library with attachments, and click on **Next** to invoke the standard file save box.
3. Identify the location of your saved file and click on **Save**.

You may have already set up your EndNote Online account when you installed EndNote. However, if did not set the account, you can set up your EndNote Online account now. There are several ways to do this; the following exercise shows you how to complete the task from your EndNote program.

### **EXERCISE Set up your EndNote Online account**

1. Click on **Edit** from the EndNote menu bar and then select **“Preferences.”**
2. Select **“Sync”** from the list of EndNote preferences options.
3. Click on **“Enable Sync”** to invoke the **“EndNote Login”** box.
4. Enter your UC email address and a password.
5. Click on the **“Sign Up”** button to create your EndNote Online account.

## Using EndNote Sync & Setting Sync Preferences

You can manually initiate the sync process at any time. Alternatively, you can set up an automatic sync process through EndNote sync preferences (see the automatic sync exercise below).

### EXERCISE Initiate the sync process

1. From the EndNote menu bar click on the Sync icon (see below).

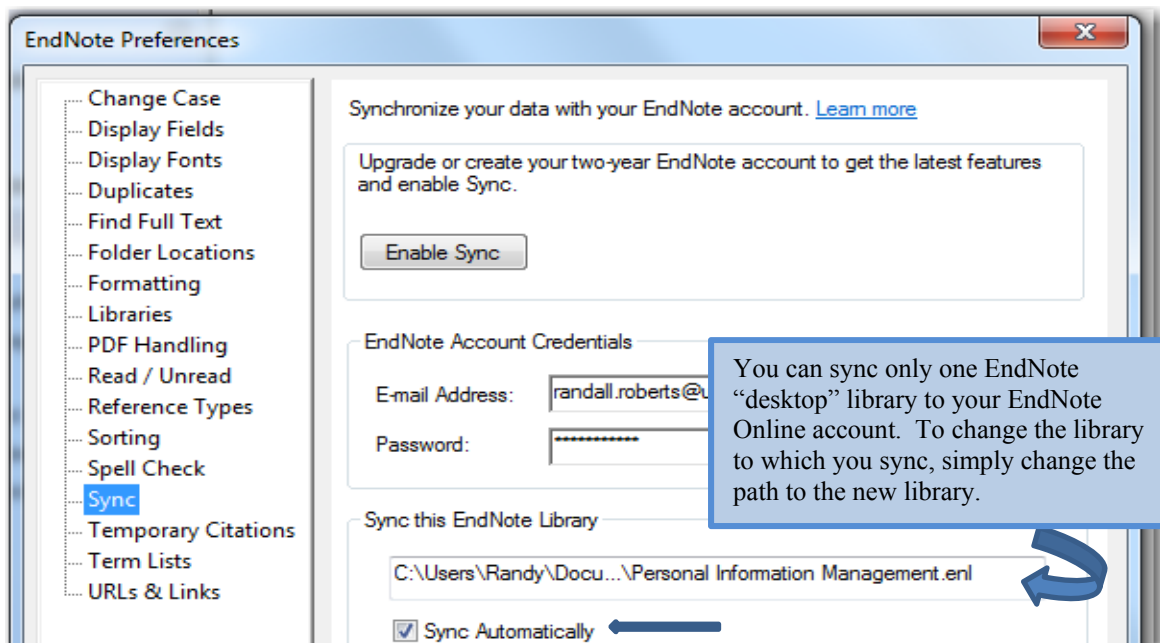


2. During the first sync all the references, including custom groups and attachments, will be copied from your EndNote desktop library to your EndNote Online account. This may take a few minutes if your library is large. (Note: Subsequent syncs will reciprocally copy from both libraries, desktop and online, and the process will be faster.)
3. If you set up an automatic sync (next exercise), changes made in either library will be reflected in the other library, including additions and deletions.

Use EndNote preferences to automate the sync process and to even change the EndNote library that you choose to sync, assuming you created multiple EndNote desktop libraries.

### EXERCISE Setting up the automatic sync

1. Click on **Edit** from the EndNote menu bar and then select **“Preferences.”**
2. Select **“Sync”** from the list of EndNote preferences options.
3. To make the sync process automatic (every 15 minutes) put a check in the **“Sync Automatically”** box and click on **[OK]**.



## EndNote Online Capture Plug-In

The browser plug-in will work in either Internet Explorer or Mozilla Firefox. You will find links to instructions for installing the plug-in below. The Capture plug-in can be used to retrieve a whole page of multiple references into your EndNote Online account, **a real plus if you don't have access to your desktop EndNote library**. A list of databases and vendors for which the Capture plug-in is compatible can be found at the [EndNote Online Help](#) web page.

### [Firefox plug-in instructions](#)

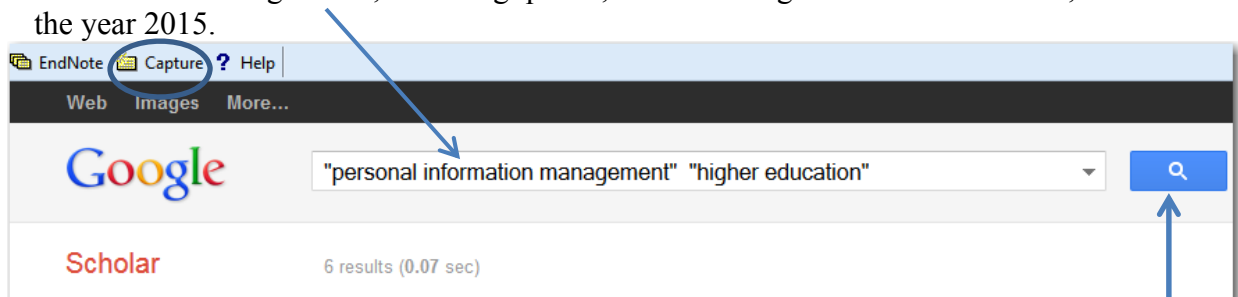
### [Internet Explorer plug-in instructions](#) (The Little EndNote How-To Book)

**Note:** see page 49 in this e-book for detailed instructions.

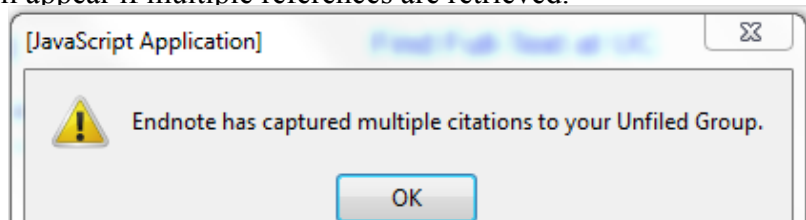
The Capture plug-in is extremely useful on those occasions when you have internet access but you do not have access to your desktop EndNote library. You can use the Capture plug-in to retrieve multiple references from a single web page and add them to your EndNote Online account. If you have set up the automatic sync feature from your EndNote desktop library, the next time you open your desktop library you will find the new references from EndNote Online have been added to your desktop library. Alternatively, you can manually sync your desktop library to accomplish the same result.

## EXERCISE Capturing data from the [Google Scholar](#)

1. Using either Internet Explorer or Firefox open your EndNote Online account and then connect to Google Scholar (see above link).
2. Enter the following search, including quotes, into the Google Scholar search box, and limit to the year 2015.



3. Click on search icon.
4. Click on the **Capture plug-in icon** (see circle in above graphic), and the following message will appear if multiple references are retrieved.



5. Look at the “Unfiled” group in your EndNote Online for the new references. You may need to sort the references by “Last Updated – newest to oldest” to view the new references.

## **EndNote Sharing & Collaboration (forthcoming)**

# EndNote

## Version X7

Randall L. Roberts  
 Reference & Instructional Services  
 Langsam Library, Univ. of Cincinnati  
 Phone: (513) 556-1864  
 Email: [randall.roberts@uc.edu](mailto:randall.roberts@uc.edu)  
 Revised: 1/5/2015

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## Workshop Objectives

- Acquire an understanding of the purpose of EndNote
- Acquire a working knowledge of EndNote’s major functions
- Learn how to customize the EndNote interface
- Learn how to create and use groups to organize your references
- Learn how to browse and search your personal database
- Learn how to use the duplicate and full-text management tools
- Build an EndNote library using the following functions:
  - Manual data entry
  - Import PDFs
  - Export data directly from a database
- Learn how to add in-text citations and a corresponding bibliography using the CWYW function
- Learn how to produce an “independent” bibliography

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## EndNote Overview

- EndNote is a desktop citation and reference management database program with internet access for remote database control and data backup security.
- The program enables users to electronically create, import and conveniently manage bibliographic information.
- EndNote significantly facilitates collection, organization and management of full text documents.
- The program facilitates the creation of in-text citations, images, bibliographies and figure/table lists in almost any major style format.
- EndNote offers collaboration capabilities that enable sharing of groups, manuscripts or even your complete EndNote library.

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## HELP – EndNote Software

- Help option from the EndNote menu bar
- Context sensitive help, select [F1]
- EndNote User Guide
 

The *EndNote X7 User Guide*, nearly 500 pages, is your comprehensive reference for EndNote X7. To access the Guide select the Windows' Start button, then "All programs" and then "EndNote." Retrieve the Guide and save it to a convenient location for future reference.

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## Important EndNote Links

- [University Libraries EndNote Information page](#)
- [EndNote home page](#)
- [Download a trial version](#) (good for 30 days)
- [Technical support](#)
- [EndNote Knowledgebase](#)

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## Cohort HELP

- **EndNote Forums & ListSers**
  - The Thomson Reuters EndNote Community
    - <http://community.thomsonreuters.com/ts/?category.id=endnote>
  - EndNote ListServ Archives
    - <http://lists.adeptsience.co.uk/endnote/>

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## Recent Enhancements

### • Version 8

- Support for Unicode standard
- Unlimited library size (previously 32MB)
- Larger field size (50Kb, 10pages)
- 9 new reference types
- 10 new reference fields
  - Link to PDF
  - Access and last modified dates
  - Name of database
  - Research notes
- Print preview for printing "formatted" reference lists

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## Recent Enhancements

### • Version 9

- Improved performance (speed)
- Addition of Unicode support and new Marc formats expands multi-language access to world wide literature
- Compatibility with Mac OS X Tiger desktop search technology for finding EndNote references

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## Recent Enhancements

### • Version X

- Conveniently link PDF files to EndNote records
- Compress PDF files in the EndNote library
- Improved & expanded control over display columns
- Improved display with show/hide empty fields option

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## Recent Enhancements

### • Version X1

- Create groups to view and manage reference subsets
- Add up to 45 file attachments to each reference
- Transfer references to and from EndNote Web for collaboration and remote access to references

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## Recent Enhancements

### • Version X2

- Addition of Smart Groups to view & manage subsets of references. (Smart Groups are driven by user developed search queries, and references are "automatically" added to these groups.)
- Addition of the *Find Full Text* utility that seeks, finds and attaches full text files (usually a PDF) to single or multiple EndNote references.
- Addition of automatic date stamp information for all new EndNote references.
- Addition of summary reports for EndNote libraries and references.

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## Recent Enhancements

### • Version X3

- Group sets now provide the option of sub-groups
- Enhanced duplicate management displays side-by-side details of references to facilitate retention decisions
- Enhanced full-text retrieval that can be customized to work with the UC Libraries' open URL resolver
- Multiple bibliographies by sections/chapters, end of document or both
- Cite-While-You-Write compatibility with Open Office

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## Recent Enhancements

### • Version X4

- Import PDF files or folder of PDFs directly into EndNote
- PDF attachment files can now be searched separately or in combination with references
- Cite-While-Your-Write (CWYW) enhancements
  - Automatic hyperlinks between in-text citations and the bibliography in Word
  - Combined edit/management command from Word toolbar
  - Citation report in EndNote of cited references in Word
- New Quick Edit tab in the Tab pane

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## Recent Enhancements

### • Version X5

- Quickly review duplicate references with the new auto-highlight feature that highlights each field where differences are found
- Add or transfer file attachments to references in EndNote Web
- View and even annotate PDF files within the EndNote Library

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## Recent Enhancements

### • Version X6

- Significantly enhanced EndNote screen layout options, i.e., more data to see and edit and more flexibility for screen organization
- Apply ratings to references (wide range of applications for this feature)
- Assign read or unread status to references
- Instant and configurable updating and synchronization of references from your EndNote PC account your EndNote Web account
- E-mail single references, including full text attachments, to colleagues

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## Recent Enhancements

### • Version X7<sup>+</sup>

- Improved synchronization between your EndNote desktop library and EndNote online, even across multiple computers & iPads
- Synchronization process to automatically backup your EndNote library, including attachments, to your EndNote online account
- Expanded PDF support, including:
  - An auto-import folder that EndNote monitors for new PDFs
  - Control how PDFs are named in your library
- Search terms from Quick Search now highlighted (version x7.1)
- Share whole library with “any” 14 collaborators, including attachments with annotations & unlimited cloud storage (version x7.2)

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