EndNote 8 ...Bibliographies Made Easy™

What is EndNote?

- EndNote is a bibliography and manuscript maker—it formats citations, figures, and tables in Microsoft® Word with the Cite While You Write™ feature.
- EndNote is a reference and image database—it specializes in storing, managing, and searching for bibliographic references in your reference library.

Before We Start: Installing EndNote

Depending on your situation, either install EndNote on your computer yourself or through the Rush Information Systems Department following EndNote's supplied instructions. The Library does not install or provide technical support for EndNote on any computer. We serve as an educational resource only, providing training on how to use EndNote. If you need technical assistance, while we will attempt to answer every question asked, we are not responsible for any troubleshooting or software problems related to EndNote in any way.

Start EndNote

To start the EndNote program:

1. From the *Start* menu, choose *All Programs*, select *EndNote*, and then choose the *EndNote Program*. A dialog box appears prompting you to open a reference library.

2. Make your selection and click *OK*.

3. If you choose *Create a new EndNote library*, you will be prompted to name the file on the next screen. Type in the file name and save.

4. EndNote will automatically open the newly created library.

What is an EndNote Library?

EndNote works with files that it calls "libraries." A library is a collection of citations, each containing the information required to create a bibliography. Additional information such as keywords, notes, and abstracts can also be stored in these references. The citation data in a library is organized into fields. The fields that appear in a reference are determined by the reference type: book, journal, conference proceeding, online database, electronic journal, etc.

- There is no limit to the number of libraries you can create.
- You can create libraries of any size. You can enter abstracts and notes upto 50KB or 10 pages of text in each.
- You can have more than one library open at a time.
- Libraries created on one platform (Macintosh, Windows or DOS) can be used with EndNote program on any other platform.
- Each library is a separate file that can be independently moved, copied, renamed or deleted.

Entering and Managing References

This is the main screen of an open library. Once a library is open, you can add new references to it.

1. From the *References* menu, choose *New Reference.*

2. An empty Reference window opens with the words "New Reference" displayed at the top. Click the *Reference Type* drop-down menu to select the type of item you are adding: Journal Article, Book, Electronic Journal, Audiovisual Material, etc.
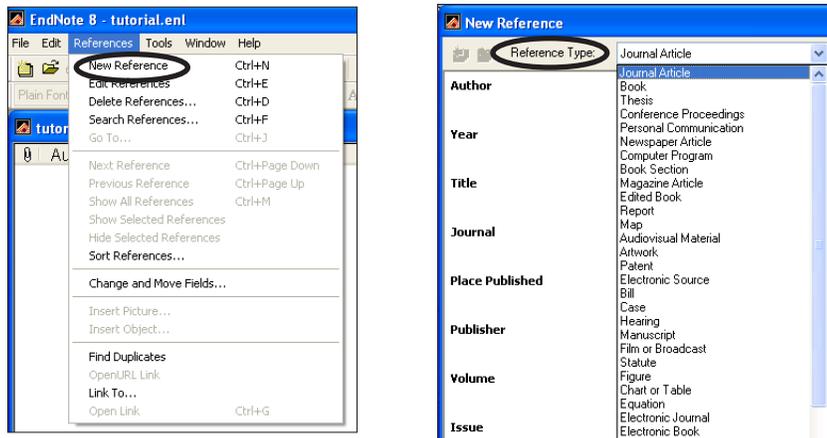
3. You are now ready to enter reference information, beginning with the author names. Author names can be entered two ways: either "First Middle Last" such as "Carol Margaret Jacobson" or "Last, First Middle" such as "Jacobson, Carol Margaret." Individual author names *must* be entered one per line, in the following way, using the ENTER key after each name:

> Right: Smith, JA   Wrong: Smith, JA Jones, BR
>   Jones, BR
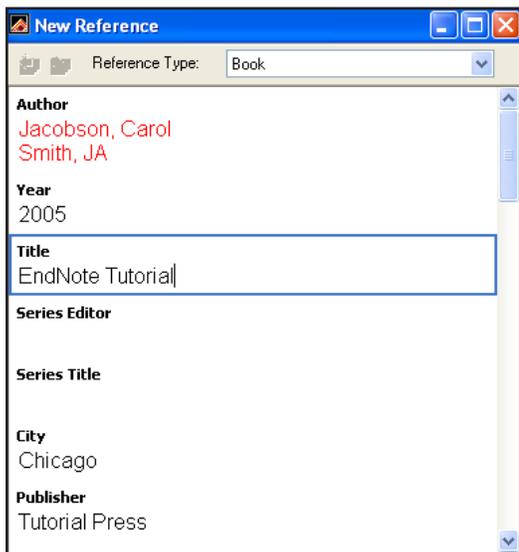
4. Continue entering the reference, using the TAB key to move to the next field, and SHIFT+TAB key to move to the previous field. You can also use the mouse to click in the desired field. If you do not have information for a particular field, leave that field empty.

   There are many information fields. The exact fields that will appear in your bibliography depends on the format you select for your bibliography. Fields like Subject Headings, while not appearing in a bibliography, make locating citations and organizing your library easier. You are encouraged to fill in as much information as possible in your records.

5. Close the Reference window by clicking the X in the upper-right hand corner of the screen or by choosing *Close Reference* from the *File* menu when you are done. EndNote automatically saves your work. Your new reference will appear in the library window.

Importing Citations From OvidWeb

Instead of having to type the information from your citations into EndNote by hand, you can automatically import the data from OvidWeb into your library.

1. Perform your search in OvidWeb. View your results and select the citations you wish to import into EndNote by clicking inside the box in front of each desired citation.

2. *The Results Manager* is located at the left side of the screen. Change the settings as shown in the example at left:

Results: *Selected Results*
Fields: *Complete Reference*
Result Format: *Direct Export*

3. Click on *Save* to continue. OvidWeb automatically opens the EndNote program and displays a list of your libraries.

4. Double click on the name of the library you wish to add your citations to, or highlight the name then click *Open*.

5. After the citations are imported, the display in EndNote shows just the new citations you imported. From this display, you can edit or delete the new citations before they are finally added to your library. When you are done reviewing the citations, choose *Show All References* from the *References* menu.
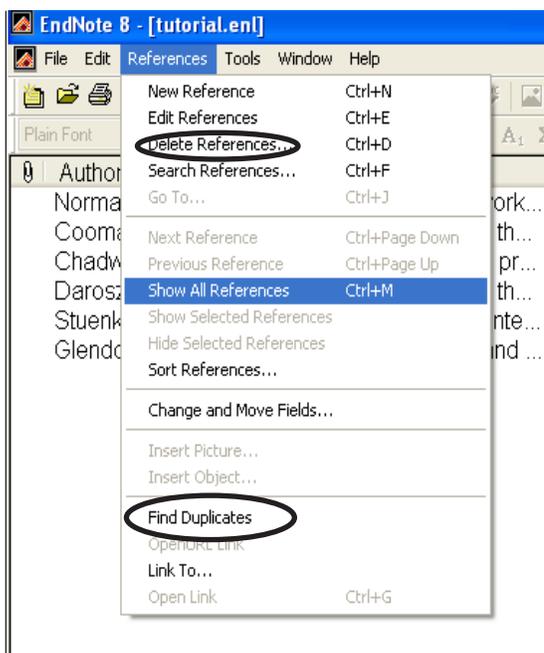
6. It is also important to make sure there are no duplicate citations in your library. To find duplicate citations, click on *Find Duplicates* from the *Reference* menu. EndNote locates the duplicate citations. You can delete the duplicates by pressing DELETE key or selecting *Delete References* from the *References* menu.

Importing Citations From PubMed

1. Perform your search in PubMed (www.pubmed.gov). View your results and select the citations you wish to import into EndNote by clicking inside the box in front of each desired citation.

2. When you have completed selecting the citations, change the *Display* option to MEDLINE.

3. The screen will change to show the selected citations in the MEDLINE format.

4. Select *File* from the drop-down menu as shown. This brings up the standard windows save box as shown below. Use the drop-down menu to select where you want the file to save to. Give your file a name. Be sure that *Save as type* is set as Text Document. Click on *Save*.
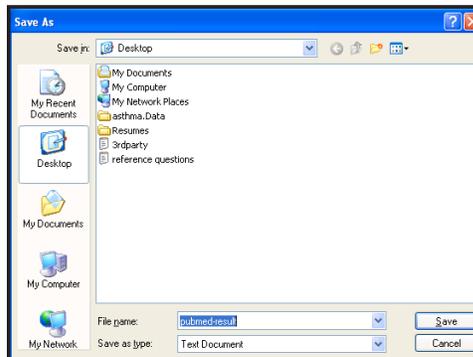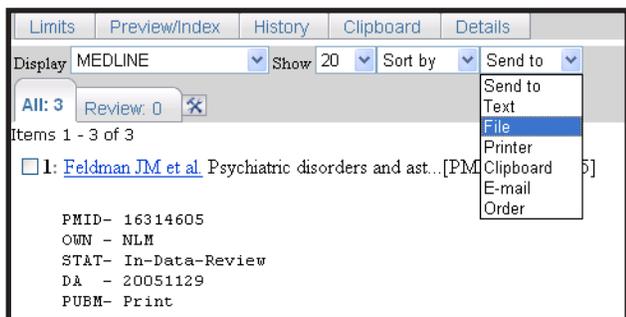
Now that you have saved your citations, you are ready to import them into your EndNote library.

1. Open the EndNote library to which you wish to import these citations. Choose *File* them select *Import*.

2. Select the file name by clicking on the *Choose File* button and locate the file of citations you saved from your search. When you find the file, click on it. The name should display in the *Import Data File:* box as seen in the example below. In the example, the name of the file for the citations saved from the PubMed search was pubmed-result.txt.
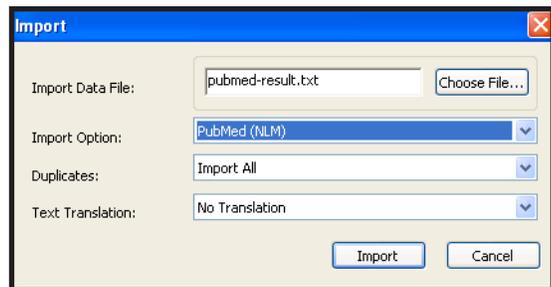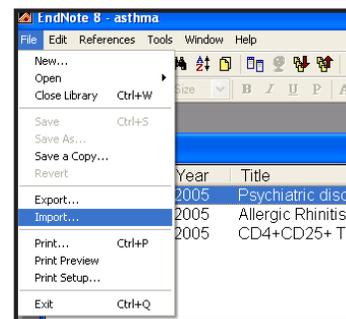
3. Select the *Import Option* that matches the database you searched. Since you searched PubMed, the correct filter is PubMed (NLM). Use the pull-down menu to find the name of the database you searched. If you do not see the name immediately, click on *Other Filters*. This allows you to search the entire selection of EndNote's import options.

4. Click *Import* to begin the process.

After the citations are imported, the display in EndNote shows just the new citations you imported. From this display, you can edit or delete the new citations before they are finally added to your library. When you are done reviewing the citations, click on *References* from the tool bar at the top of the screen and select *Show All References*.

Sorting Your Library

You can sort your citations in a variety of ways. You should be able to sort by any field in a record. From the main EndNote screen, click the [icon] button on the tool bar at the top of the screen.
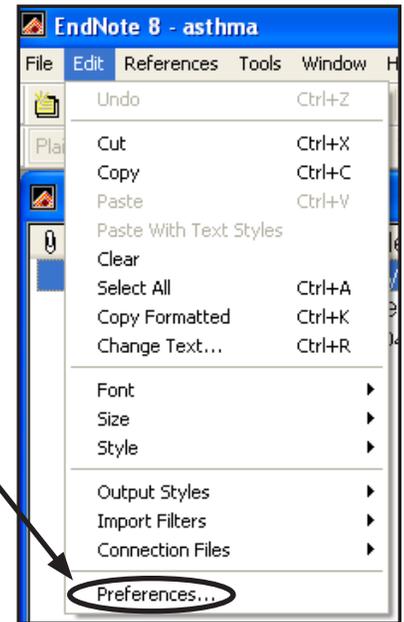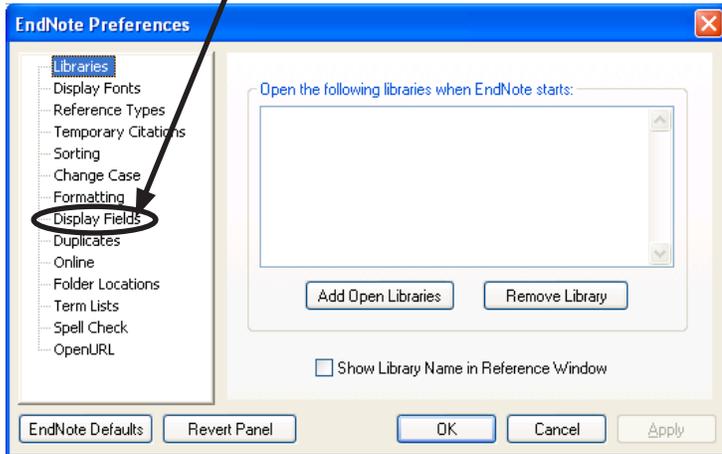
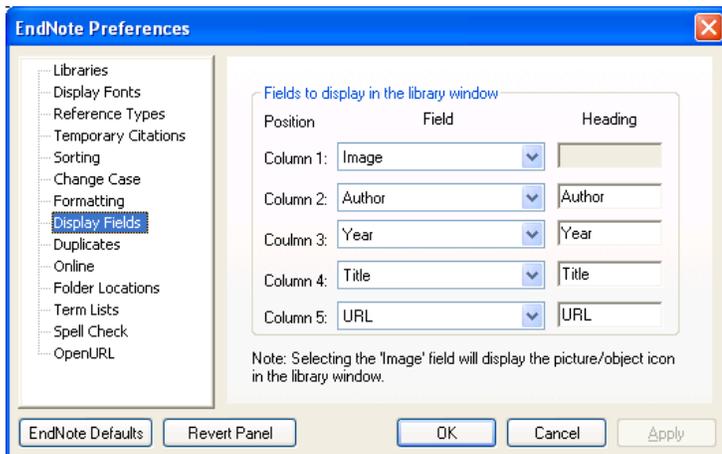Change the field you wish to sort by and click *OK*.

Display Options

You can change the information that is displayed on the main screen of your EndNote library.

1. From the *Edit* pull-down menu, select *Preferences*.
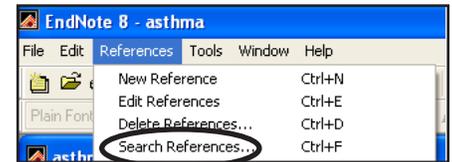
2. Select *Display Fields*.

3. Select which fields you would like to display then click *OK*.

Searching Your Library

EndNote provides several ways to organize your data. Click on *References* and select *Search References* to see the options.

Every field in an EndNote record can be searched.

1. Enter a keyword, number, date, etc. that you wish to search for.

2. Select which field you want to search.

3. Specify parameters such as *contains, greater than, less than,* etc.

4. You can add a second term using *And, Or,* or *Not.*

5. Click *Search*.
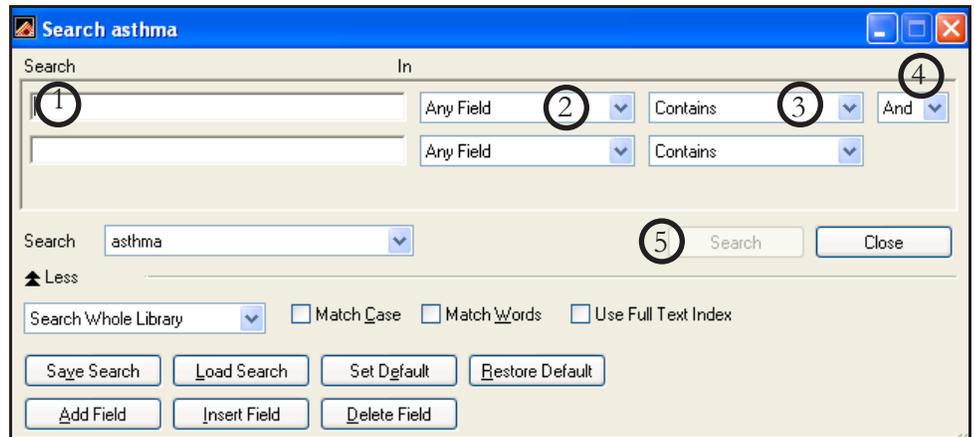
Creating Bibliographies

References in an EndNote library can be used to generate bibliographies. A bibliographic style is applied to the raw data in the reference library; the style controls the appearance of references in formatted bibliography. EndNote provides several different ways to generate a bibliography:

- Using the EndNote Add-in for word processing softwares. The Add-in integrates with your word processor. As you write, you add temporary citations to the document whenever you want to cite a reference in the text. The Add-in *Format Bibliography* command replaces the temporary citation with a formatted in-text citation, and automatically creates a finished bibliography.

- Using the *Export* command. Selected references can be exported to text or word processor files as formatted independent bibliographies.

- By printing selected references.

- By copying and pasting individual formatted references using the *Copy Formatted* command.

The first step in creating a bibliography is to tell EndNote what style you would like your bibliography to be in. (i.e. APA Format, Chicago Manual of Style, etc.)

In order to select a style for your bibliography, select *Output Styles* from the *Edit* menu. Then select *Open Style Manager*. This displays all of the styles EndNote can apply to format your bibliography. Scroll through the styles to select the one you wish to use by placing a check mark. Close the box by clicking on the "x" on the upper-right corner of the box.

When you go back to *Output Styles*, your selection will appear on the list. Select the style from the list.
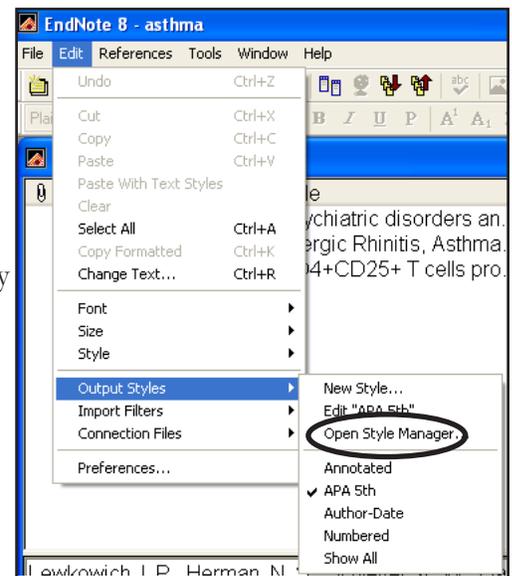
Printing Bibliographies from Your Library

To print a stand-alone bibliography (a list of citations that are not part of a paper) from the citations in your database, you can use one of the following methods:

Using the Export Feature

1. Select an *Output Style* for your bibliography (see previous page).

2. Choose the references you want by holding down the Control (Ctrl) key on your keyboard while you click on the references you are interested in. Do not open the references.

3. Choose *Export* from the *File* menu. The Windows *Save As* dialog box appears. Give a file name and select a location. Select *Rich Text Format (.rtf)* for *Save As Type*. Click *Save*.

4. You can now open the file with your word processor, make edits, and save the document or print it out.

Using the Copy Formatted Feature

1. Select an *Output Style* for your bibliography (see previous page).

2. Select the citations to work with.

3. Under the *Edit* menu, select *Copy Formatted*.

4. Open your word processor. Use the *Paste* command to add the selected citations into a document in the format you selected.
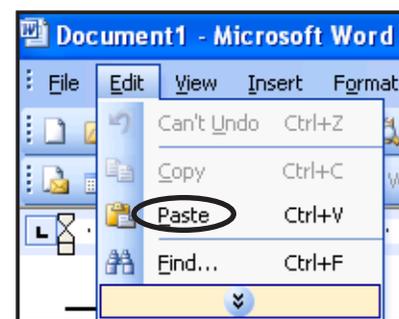
Microsoft Word word processing software

Printing selected references directly from the EndNote library

1. Select an *Output Style* for your bibliography (see previous page).

2. Select the citations to work with.

3. Choose *Print* from the *File* menu.

Writing a Paper

When EndNote is installed, it automatically creates tools allowing you to use EndNote from within your word processor (Microsoft Word or Microsoft WordPerfect). The features are located under the *Tools* menu in the word processor. You may also see the EndNote Tool Bar at the top of your word processor screen. (shown on page 8)

To add references to a paper you are writing, open the document using your word processor. Next, open the EndNote library that contains the citations you wish to work with.
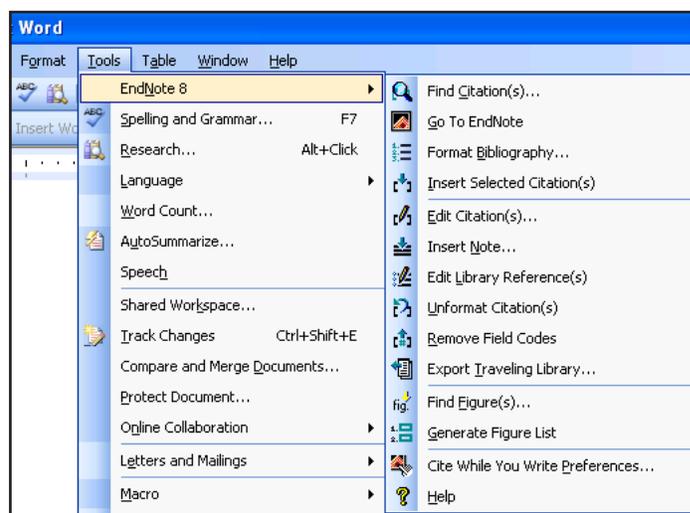
Tools pull-down menu

Inserting a Reference

1. Type the sentence you wish to add a citation to. Position your cursor so that there is a space between the last word of the sentence and the period.

   Example: *Verbal instruction, illustrations, pamphlets, and handouts were the most frequently used forms of educational media* |.

   ↑
   Insert one space and place cursor here

2. Select *Go To EndNote* from the EndNote *Tools* menu of your word processor. It will take you to your EndNote library. Select the citation you wish to insert. It should now be highlighted. If you wish to cite multiple works in the same citation, hold down the Control (Ctrl) key on your keyboard while you click on the citations you wish to insert. They should all appear highlighted. When you have selected your citaions, return to your word processor. From the word processor's *Tools* menu, select *Insert Citation*. The citation(s) you highlighted are added to your paper.

   Example: *Verbal instruction, illustrations, pamphlets, and handouts were the most frequently used forms of educational media [Lawler, 1994 #39].*

At this point, the citations are in a temporary format. The information displayed shows the data from your End-Note library, **not how it will appear in your paper**. For example, "#39" in the sample above indicates this is a citation number 39 from your EndNote library, not the 39th citation in your paper. You can add or delete citations from anywhere in your document. EndNote will automatically update the numbering when you make the final formatting.
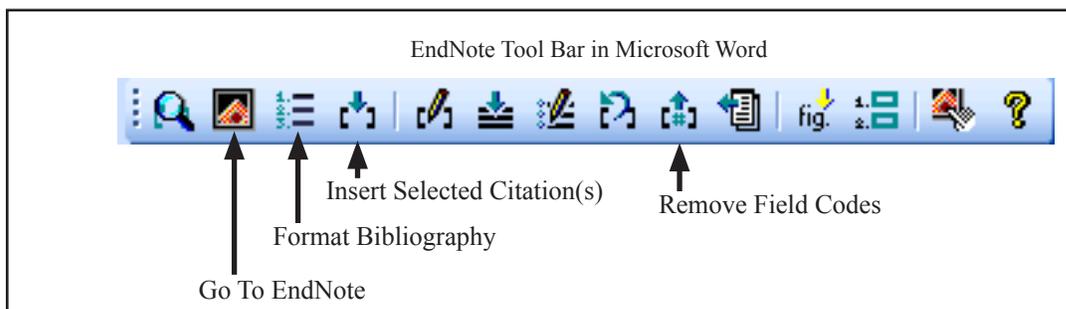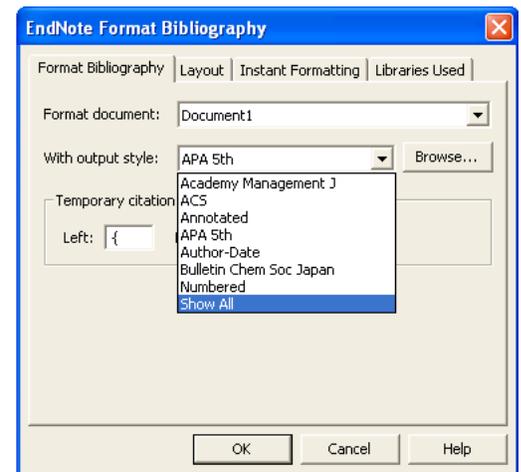
Before you go any further, create a back-up of your paper and keep it in a safe place. This is critical. Always make sure you have a clean backup copy of your paper before you do any EndNote formatting.

Formatting Bibliography

To format the citations, select *Format Bibliography* from the *Tools* menu from your word processor. The *EndNote Format Bibliography* dialog box appears.

When you click on the *With Output Style* drop-down arrow, the list of style options appears. If the style you wish to use is not listed, select *Show All* from the list and click *Browse*. Select the style you wish to use from the list. Click *OK* then *OK* again to close the dialog box.

Please note that if you add new citations to a document after formatting it, you must run the *Format* command again. Formatting is not permanent. If you format your paper in one style, you can change it at any time to a different style. Once the citations are formatted, you can change their appearance (font type and size) through the normal tools of your word processor.

EndNote Tool Bar in Microsoft Word

Insert Selected Citation(s)

Format Bibliography

Remove Field Codes

Go To EndNote

Formatting Your Paper for Electronic Submissions via Disk, E-mail, Etc.

If you are submitting a paper electronically (by disk, e-mail, etc.) you must follow the steps described below to insure that your references and bibliography appear correctly when the file is opened. The EndNote Add-in for Word and WordPerfect uses hidden fields and codes to store information about the citations in your word processing document. You MUST remove these hidden codes to submit a paper electronically.

Important: Before you unlink the field information, make a copy of your paper by choosing *Save As* from Word's *File* menu. Give the file a name. Remember--This is the copy you will need if you want to re-format the bibliography with EndNote.

Select *Remove Field Codes* from the *Tools* menu of your word processor to unlink the field information. Now the citations and bibliography are converted to the standard word processor format. You can now save the document and send it via any electronic media without losing any data; the citations and bibliography retain the formatting you selected.

Adding EndNote Tools to Microsoft Word

EndNote allows users to access its features from within Microsoft Word. When EndNote is installed on a computer, it automatically creates this link. However, when using networked workstations, you may have to install the link from MS Word to EndNote by hand.

1. Go to the *Start* button on the lower left corner of your screen and select *My Computer*. Double click the *Local Disk (C:)* icon.

2. Double click *Program Files* then *EndNote 8*.

3. Scroll down to find EN8Cwyw (Word.Addin.8) and EN8CWYW (Microsoft Word Template). Select both by holding down the Control (Ctrl) key on your keyboard and clicking on the icons.

4. Select *Copy* from the *Edit* menu.

5. Go back to *Documents and Settings* by clicking on the *Back* button. Double click *(your user name; ie jdiehl)* then *Application Data,* then *Microsoft,* then *Word,* then *START UP*.

6. Select *Paste* from the *Edit* pull-down menu.
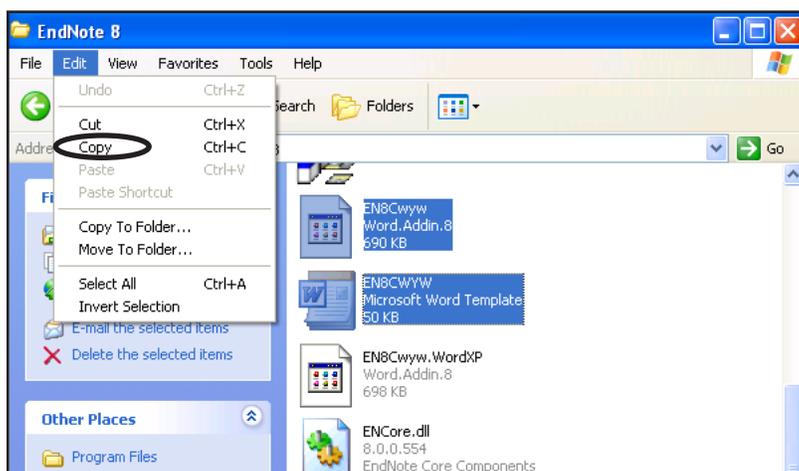
Additional Help

This handout covers the basics of using EndNote. There are many other features of this software that have not been discussed. To learn more about EndNote or to find additional help:

- From within EndNote program, select the pull-down menu *Help*. Select *Contents* to see a list of topics. Select *Search* to find help on a specific question.

- Contact the reference staff at the Library. They will gladly assist with any problems or questions.

- Browse the manufacturer's home page at http://www.endnote.com. You will find several sources of help. Visit http://www.endnote.com/support/entechform.asp for EndNote's technical support contact information.

- Read the manual. They are available for use within the McCormick Educational Technology Center (METC). Ask at the METC Service Point.

Library of Rush University Medical Center
600 South Paulina Street, 5th Floor
Chicago, Illinois 60612
(312) 942-5950
Lib_Ref@rush.edu
http://www.lib.rush.edu/library