EndNote X9

MANAGING YOUR REFERENCES
Introduction ............................................................................................................................ 2
Sorting references ................................................................................................................... 2
Searching endnote .................................................................................................................. 3
Editing references .................................................................................................................. 3
Manually adding a new reference ............................................................................................ 4
Attaching and viewing pdf files .............................................................................................. 5
Searching and annotating pdfs .............................................................................................. 6
Opening PDFs in full screen .................................................................................................... 7
Backing up your library .......................................................................................................... 8
Creating group sets ............................................................................................................... 8
Creating groups .................................................................................................................... 9
Smart groups ........................................................................................................................ 10
Importing PDFs .................................................................................................................... 11
Setting up a static PDF import folder ..................................................................................... 12
Searching a remote database in EndNote ............................................................................. 13
Searching PubMed ................................................................................................................. 13
Downloading from the internet .............................................................................................. 16
  Downloading from PubMed ................................................................................................. 16
  Downloading from IBSS ....................................................................................................... 17
  Downloading from Pline ....................................................................................................... 18
  Downloading from Ovid ....................................................................................................... 19
  Downloading from EBSCO Host ......................................................................................... 20
  Downloading from Web of Science .................................................................................... 21
  Downloading from SciVerse SCOPUS .............................................................................. 22
  Downloading from Cochrane ............................................................................................ 23
  Downloading from Google Scholar ................................................................................... 25
Managing duplicates .............................................................................................................. 26
Entering references into Word ............................................................................................... 27
Changing your referencing style ........................................................................................... 28
Adding a page number to a text citation .............................................................................. 29
Omitting the author/year from a citation .............................................................................. 30
Entering references into PowerPoint ..................................................................................... 31
  Inserting an in-text reference ........................................................................................... 31
  Inserting a bibliographic reference ................................................................................... 31
Creating a categorised reference list .................................................................................... 32
Creating an independent bibliography ................................................................................ 33
Converting references to plain text ..................................................................................... 34
Introduction

EndNote is bibliographic referencing software that can be used to store and sort references, manage your PDF documents, and to insert referencing information into your Word documents.

The Sample EndNote File will open in the default view (below).

Sorting references

To sort your EndNote references click on the column headings. Click on the same heading again, to sort in the reverse order.

Click on any column heading to change the order of your references
Searching Endnote

To search for a particular record in EndNote simply select the reference fields you wish to search (e.g. Author, Year, Keywords) and type your search terms. Then click on the SEARCH button.

Choose the fields you wish to search

Editing references

To edit a reference in your library, click once on the reference. All of the information about that reference will appear in the panel on the right of the screen.

Then click in the field you wish to edit and delete or add text.

Click in any of these fields to edit the text

When you click on another reference in your reference list you will be asked if you wish to save any changes you have made to the reference you have just edited.

Click YES to save your changes.
Manually adding a new reference

To manually add a new reference to your library:

1. Click on REFERENCES in the toolbar at the top of the screen and select NEW REFERENCE.

2. First, choose the type of reference you will be entering (e.g. Journal Article, Report, Web Page). Once you have chosen a reference type EndNote will display empty fields that reflect the kinds of information relevant to that reference type.

3. Enter your reference details in the appropriate fields.

4. You do not need to fill in all the fields. Fill in the fields that you know will need to appear in the reference when it is displayed in a bibliography.

In the Author field **ALWAYS** put each author on a different line.

In the Author field **ALWAYS** put a comma at the end of the name of an organisation.

Important!
Once you have finished entering the information about your new reference click on the small, light blue ‘x’ in the top right of the screen.

Attaching and viewing pdf files

EndNote allows you to attach PDFs (or other file types you might wish to reference) to the references in your library. To attach a PDF to your reference you must first save the PDF to your computer.

Then click once on the reference in your library and click on the ATTACH FILE icon in the top right of the screen.

Now browse to your PDF and select OPEN. Once you select another reference, you will be prompted to save changes. Select YES.

PDFs are visible on the attached PDF tab. If other file types are used, then they can be accessed by going to the File Attachments field and then double clicking on the appropriate icon.
Searching and annotating pdfs

You can search your attached PDFs in EndNote or you can add annotations to your PDFs which you can then search in EndNote.

To search your attached PDFs simply select PDF as the search field in your search screen.

There are two types of PDFs: NATIVE and SCANNED. Native PDFs have been generated from an electronic source. Scanned PDFs are scanned images. Many older journal articles are scanned PDFs.

EndNote can only search native PDFs. So, if you use this feature please be aware that the search function may not work on some of your PDFs.

EndNote does not tell you which PDFs it was able to search and which it was not.

You are also able to add annotations to your PDFs in EndNote. To add an annotation simply click on a reference which has an attached PDF, then click on the PDF tab in the side panel.

Then click on the ‘sticky note’ icon, and click on the spot in the PDF where you wish the sticky note to go. Double click the sticky note to add an annotation.
If you wish to search your annotations simply change the search field in your search screen to PDF notes.

An EndNote file is not a single file, rather it is a .enl file:

And a .data folder:

These files must always be kept together (i.e. if you move the .enl and not the .data folder your library will not open.

You must not change the file name of either your .enl file or your .data folder.

IMPORTANT!

Once you have attached your PDFs they are kept in the .data folder associated with your .enl EndNote file.

Opening PDFs in full screen

If you wish to expand your PDF so that it may be viewed in full-screen rather than in the side panel, click on the OPEN PDF button in the side panel.
Back up your library

In order to open your EndNote library, you will have to have both the .enl file and the .data folder. Therefore, if you want to create a backup copy of your library or if you wish to move it to another location, you should compress both those files.

To create a backup copy of your library, select FILE, then COMPRESSED LIBRARY (.ENLX).

You will be prompted to decide if you want to attach the compressed file to an e-mail, include your file attachments (i.e., your PDFs) and whether or not you wish to save your entire library. Choose your preference and select NEXT.

Your compressed file can then be saved to your preferred location.

Creating group sets

Groups are a great way to keep your references organised. You can create as many groups as you like and can drag-and-drop references into them in order to organise your library.

A single reference can be put into as many groups as you like.

Group Sets are sets into which groups may be placed.

To create a group set, right-click in the group pane on the left side of the screen and select CREATE GROUP SET.

IMPORTANT!

EndNote will not always find the PDFs you ask it to search for. If EndNote cannot find a PDF, you may still be able to obtain a copy through the databases which may be accessed through the LSHTM Library web page.
To delete a group set, or to rename it, right click on the group set and select either DELETE or RENAME.

Once you have created a group set you may add as many groups to it as you like.

**Creating groups**

To create a group, right click on a group set and select CREATE GROUP and then name your group.

You can now drag-and-drop references from your reference list into your group. A single reference can be put into as many groups as you like.

When you remove a reference from a group it will not be deleted from your library. To delete a reference from a group, click on the group, click once on the reference you wish to remove from the group, then right click and select REMOVE REFERENCES FROM GROUP.

There are some groups that appear in your EndNote library automatically.

Clicking on this group will display all of the references in your library.

Any references which have not been assigned to a group appear in the unfiled group

This is where all of your discarded references are kept. You can delete your trash can by right clicking on the icon and selecting EMPTY TRASH.
Smart groups

Smart Groups are groups that are set up with certain search terms such that when you import references into your library any references which meet the search criteria will automatically be assigned to that group.

For example, you could set up a Smart Group using an author’s name as a search term (e.g. WILLIAMSON, E.). Every time you import references into your library EndNote will automatically assign to my Smart Group any references with an author WILLIAMSON, E.

To create a Smart Groups, right click on a Group Set, then select CREATE SMART GROUP.

Now, name your Smart Group, and set the parameters you would like Endnote to use to search all existing and incoming references. Click CREATE when you are finished.
**Importing PDFs**

In EndNote X9 you may import PDFs that you have saved to your hard drive. EndNote will create a new reference for any imported PDFs and will attach your PDF to the reference. Endnote may be able to extract information from your PDFs in order to populate the reference fields – though not always! If EndNote cannot fill in the fields for you, you will have to do this manually.

To import a PDF into your EndNote library:

1. Make sure you only have one EndNote library open.
2. Make sure you have saved your PDFs on your hard drive.
3. In EndNote click on FILE and then IMPORT. Choose FILE if you wish to import a single PDF. Choose FOLDER if you wish to import an entire folder of PDFs.
4. Change the import option to PDF in the Import Option drop-down menu.
5. Click IMPORT.
6. If EndNote cannot extract the information from a PDF it will create a new reference, and attach the PDF. Your reference will include the file path in the Title field – the rest of the fields will be empty. It will appear in your reference list like this.

![EndNote Import PDF dialog box](image)

You will need to open the reference and fill in the missing fields!
Setting up a static PDF import folder

EndNote X9 will allow you to designate a folder on your computer from which it can automatically import PDFs. EndNote will check the folder at regular intervals while the programme is open and will import any PDFs that have been added since the last time it checked.

To set up a static import folder:

1. Create a folder on your H: drive (you might want to put some PDFs in the folder to start).

2. Open EndNote X9 and click EDIT and then PREFERENCES.

3. On the left of the PREFERENCES dialogue box select PDF HANDLING.

4. If you wish EndNote to rename your PDFs before importing them select the format you wish EndNote to use under PDF AUTO RENAMING OPTIONS.

5. Tick ENABLE AUTOMATIC IMPORTING and browse to the folder you created and click OK.

6. Click OK in the dialogue box.
Searching a remote database in EndNote

Before you ask EndNote to search a database you **MUST** decide if you want to *import all of the references you have found from your search*, or if you want to see the results of your search first and then *decide which references you wish to import* into your EndNote library.

If you wish to search an online database and have ALL THE SEARCH RESULTS IMPORTED TO YOUR LIBRARY you must make sure the Integrated Library & Online Search Mode is selected.

If you wish to search an online database so that you can see all of the references and SELECT THE ONES YOU WISH TO IMPORT TO YOUR LIBRARY you must make sure the Online Search Mode is selected.

**Searching PubMed**

You can search PubMed using the EndNote ONLINE SEARCH feature. To search PubMed click TOOLS and then select ONLINE SEARCH.
Once you have selected Online Search the connection box will appear. Scroll until you see PubMed (NLM). Select PubMed (NLM) and click CHOOSE.

The search panel will now indicate that you are searching a remote library.

You can now type your search criteria in the search panel. Change the search fields as required. When you have finished entering your search criteria click SEARCH.

Once you have selected SEARCH EndNote will show you how many search results it has found. You can click OK if you want to import all of the found references. Alternately, you can change the numbers in the record box to indicate how many of the search results you wish to import.

If you are in the Integrated Library & Online Library Online Search Mode search results will automatically be imported into your library. If you have selected Online Search Mode you will have to select the references from the list and click COPY TO LOCAL LIBRARY to transfer them to your EndNote Library.
If you use search terms that are too broad your search will return too many results. If this happens, either refine your search or you can change the numbers in the record box to indicate how many of the results you would like to import into your library.

**DO NOT** select OK if your search retrieves too many results!

---

**IMPORTANT!**

Too many search results!!
Do not click OK!
Downloading from the internet

Most online databases and journals will allow you to export references to EndNote. Each database and journal page requires a slightly different procedure for exporting to EndNote. Some of the frequently accessed databases and journals will be used as examples.

Downloading from PubMed

To download from PubMed either access PubMed through the LSHTM Library page or go directly to www.pubmed.org.

1. Enter your search terms in the search box.
2. When PubMed returns your search results check the boxes next to the references you wish to import into EndNote.
3. Then select SEND TO (in the top right of the page).
4. Click on the button labelled CITATION MANAGER.
5. Select CREATE FILE and when you receive a warning from Windows that a website is trying to download content click ALLOW.

When you need to import references into Endnote you need to have the library open that you want EndNote to import to.

You must have only one library open!
**Downloading from IBSS**

To download from the International Bibliography of the Social Sciences (IBSS) you must first access the IBSS from the Library webpage. To download references from the IBSS:

1. Enter your search terms in the search box.

2. Select the search results that you would like to export and then click Save, then under EXPORT/SAVE select RIS from the list.

3. When the pop-up window opens make sure it looks like the example below and select CONTINUE:

4. Click OPEN when prompted by Windows.
**Downloading from Popline**

To download from POPLINE either access POPLINE through the LSHTM Library page or go directly to www.popline.org.

1. Enter your search terms in the search box.
2. When POPLINE returns your search results scroll down the page to the option to EXPORT SEARCH RESULTS on the right side of the screen.
3. Select RIS, then select OPEN, and when you receive a warning from Windows that a website is trying to download content click ALLOW.
4. If you want to select which references to export to EndNote you will have to set up a user account with POPLINE so that you can add references to the MY DOCUMENTS folder in POPLINE.
5. To set up an account in POPLINE simply click on the SIGN IN button on the POPLINE main page and select CREATE A NEW ACCOUNT.
6. Once you have set up an account you will be able to save references to your MY DOCUMENTS folder in POPLINE. To export references to EndNote from your MY DOCUMENTS FOLDER select RIS under EXPORT MY DOCUMENTS.
7. Select OPEN.
**Downloading from Ovid**

To download from Ovid Databases (including: EconLit, EMBASE, GLOBAL HEALTH, HMIC, MEDLINE, PsychEXTRA, PsychINFO, and Social Policy and Practice) you will have to access the databases through the LSHTM Library page.

1. Enter your search terms in the search box.
2. When an Ovid database returns your search results you will have to tick the boxes next to the references that you wish to export.
3. Then click EXPORT.
4. Once you have clicked EXPORT the database will pop-up a dialog box.
5. In the dialog box change the EXPORT TO option to ENDNOTE and choose COMPLETE REFERENCE.
6. Select EXPORT CITATION.
**Downloading from EBSCO Host**

To download from EBSCO Databases (including CINAHL Plus and Africa-Wide Information) you will have to access the databases through the LSHTM Library page.

1. Enter your search terms in the search box.
2. When the EBSCO database returns your search results you will have to add any references you wish to export to your folder by clicking ADD TO FOLDER.
3. Once you have added all the references you wish to export to your folder, click on the FOLDER icon at the top of the screen to see your references.

4. In your folder select the references you wish to export by ticking the box next to the reference.
5. Then select EXPORT on the right side of the screen.
6. Do not change the file format options as they are set to export to EndNote by default.
7. Click SAVE.
Downloading from Web of Science

To download from Web of Science you will need to access the database from the LSHTM Library webpage.

1. Enter your search terms in the search box.
2. Tick the boxes next to the references you wish to export.
3. At the top of the screen click on the drop-down menu and select SAVE TO ENDNOTE DESKTOP.
4. Then select ENDNOTE at the top of the screen (NOTE: do not click on EndNote Web).

5. Change the drop-down option to AUTHOR, TITLE, SOURCE, ABSTRACT.

6. Click SEND.
SciVerse SCOPUS is available through the LSHTM Library page.

1. Enter your search terms in the SEARCH FOR box and click SEARCH.
2. Tick the boxes next to the references you wish to export.
3. Click EXPORT.

4. In the export screen change the Export Format to RIS FORMAT (ENDNOTE, REFERENCE MANAGER).
5. Select CITATION AND ABSTRACT INFORMATION in the Output drop-down menu.

6. Click EXPORT.

7. At the bottom of the screen you may see a prompt asking you if you wish to open or save the file. Click OPEN.
The Cochrane Library is accessible through the LSHTM Library or directly at www.thecochranelibrary.com.

1. Enter your search terms in the search box.

2. Tick the boxes next to the references you wish to export.

3. Click EXPORT SELECTED (or EXPORT ALL if you wish to export all your search results).

4. Change the Export Type to CITATION AND ABSTRACT.

5. Select EXPORT CITATION.

6. When you receive the pop-up box asking you if you wish to open or save the file, click on SAVE.

7. Save the file somewhere where you can find it easily.

8. In EndNote go to FILE, then select IMPORT, then select FILE.

9. Browse to the file and then in the IMPORT OPTION field select OTHER FILTERS.

10. Choose the filter called COCHRANE LIBRARY (WILEY).
11. Click CHOOSE.

12. Then click IMPORT.
Google Scholar is not an academic database! However, it may come in useful if you need to locate something quickly. Google Scholar can be accessed at www.googlescholar.com.

You will need to change the settings at Google Scholar in order to see the Export to EndNote option. To access the Google Scholar Settings click on SETTINGS at the top of the Google Scholar Screen.

1. In the settings screen change the Bibliography Manager option to ENDNOTE.

2. Click SAVE.

3. Enter your search terms in the search box.

4. When you wish to export a reference click on IMPORT INTO ENDNOTE.

5. Click OPEN when the dialogue box appears.

6. You may receive a warning from Windows that a website is trying to download content, click ALLOW if prompted.
Managing duplicates

You may occasionally find that you have created or imported a record more than once. To check for and remove duplicates:

1. Click on your ALL REFERENCES GROUP.
2. Select REFERENCES (from the menu) and then FIND DUPLICATES.
3. The Find Duplicates box will appear. You can scroll through the references and decide which one you would like to keep by selecting KEEP THIS RECORD.

It’s important to remove duplicate entries in EndNote before you start adding references to Word documents, where they are treated as separate references and will appear as duplicates in your bibliography.

**IMPORTANT!**
Entering references into Word

The Cite While You Write facility in Word allows you to add citations as you type your document but to add references at a later stage, the procedure is exactly the same.

When Word and EndNote are installed on the same computer an EndNote tab will appear in Word.

1. Open EndNote and Word.

2. In your Word document click on the place where you would like the reference to go.

3. Click on the Go to EndNote option on the EndNote X9 tab in Word and select your reference or references [NOTE: if you want to insert more than one reference in the same place go to EndNote and select the first reference, then hold down your CONTROL key and select the other references]

4. Now click on the INSERT CITATION button at the top of the screen.
5. You can also insert your references from in Word. Just click on the bottom of the INSERT CITATION button and select INSERT SELECTED CITATION(S).

Changing your referencing style

EndNote contains thousands of referencing styles. The most popular styles have been included in your drop-down menu for easy access.

Styles fall into two categories: written styles (e.g. Harvard style) or numbered styles (e.g. Vancouver style).

If you wish to change your referencing style:

1. Click on the EndNote tab in Word.
2. Click on the STYLE drop-down box and select the style you wish to use.

Harvard style looks like this when inserted in the text. (Williamson, 2011)

Vancouver style looks like this when inserted in the text. (1)

You are required to use the referencing style indicated in your Project Handbook (for your Summer Projects). For module assessments students should refer to the Academic Writing Handbook for guidance on referencing.

IMPORTANT!
Adding a page number to a text citation

If you include a direct quote in your work you MUST include a page number. To add a page number to your in-text citation:

1. Import your citation into Word.
2. Click once inside the in-text citation.

3. Click on EDIT & MANAGE CITATIONS on the EndNote tab in Word.

4. In the SUFFIX field type the page number in exactly as you need it to appear in the text.
Omitting the author/year from a citation

If you are referencing using a written style (e.g. Harvard) you may need to remove either the author’s name or the year from the in-text citation.

In the following case we would need to remove the author’s name as it is already mentioned in the sentence.

The author’s name is here.

So we don’t need it here.

1. Import your citation into Word.
2. Click once inside the in-text citation.
3. Click on EDIT & MANAGE CITATIONS on the EndNote tab in Word.
4. In the formatting drop-down box select the field you wish to omit.
5. Click OK.
Entering references into PowerPoint

EndNote X9 allows you to insert references from an EndNote library into PowerPoint presentations.

NOTE: This only works in Windows – this feature is not available for Macs.

To insert references into your PowerPoint presentations:

1. Open your EndNote library and your PowerPoint presentation (you should see the EndNote X9 tab in PowerPoint)

   ![EndNote X9 tab in PowerPoint]

2. Inserting an in-text reference

   2. Click in the section of your PowerPoint presentation where you would like the reference to be inserted.
   3. In your EndNote library click on the reference(s) you wish to insert.
   4. Go back to your PowerPoint presentation and select the referencing style you wish to use (NOTE: you cannot change the referencing style once a reference has been inserted).
   5. Then click INSERT SELECTED CITATION(S).

   ![Insert Selected Citation(s)]

3. Inserting a bibliographic reference

   Inserting references into PowerPoint does not automatically create a consolidated bibliography at the end of your PowerPoint presentation. However, you can insert bibliographic references manually. You may wish to insert the full bibliographic reference into the slide with the in-text...
reference, or at the end of your presentation as a consolidated bibliography.

2. First, it may be best to create a text box in the section of your slide into which you wish to have your reference(s) appear.
3. In your EndNote library click on the reference(s) you wish to insert.
4. Go back to your PowerPoint presentation and select the referencing style you wish to use (NOTE: you cannot change the referencing style once a reference has been inserted).
5. Then click INSERT SELECTED REFERENCE(S).

Creating a categorised reference list

Once you have finished entering your references into your Word document you may choose to re-organise your references so that they display in the categories of your choosing in the reference list (e.g. by reference type, or by topic).

To create a categorised reference list:

1. Insert your references into your document normally.
2. In Word click on the EndNote X9 tab and select CATEGORIZE REFERENCES and then CONFIGURE CATEGORIES.
3. In the Configure Categories dialogue box press the [-] button to remove any groups you do not want and the [+] button to add any.
4. Once you have created all of your category headings simply drag and drop the references into the
category to which they apply. NOTE: You can re-order a category heading by dragging it up or down the list.

5. Click OK. Your reference list will now appear as a categorised list based on the categories you have created.

Creating an independent bibliography

You may wish to create an independent bibliography (i.e. just a list of references not associated with a referenced paper).

1. Go to EndNote and change the referencing style at the top of the screen to the style you wish your bibliography to appear in.
2. Then select all of the references you wish to appear in the bibliography (use the CONTROL key to select more than one reference).
3. Right click and select COPY FORMATTED.
4. Open a Word document.
5. Right click in your Word document and select PASTE.
Converting references to plain text

You may wish to convert your Word document to plain text (e.g. some journals may request that you submit manuscripts that are not linked to an EndNote library). You may also choose to do this once all your references are inserted (e.g. if you need to make minor edits manually).

1. In your EndNote tab click on the CONVERT CITATIONS AND BIBLIOGRAPHY drop-down box.

2. Select CONVERT TO PLAIN TEXT.