

# OBJECTIVES

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- ❖ **What is** EndNote?
- ❖ EndNote X7 (**Installation & technical issues**)
- ❖ Introduction to EndNote's **interface**
- ❖ **Importing** references
- ❖ **Managing and organizing** citations
- ❖ **Inserting citations** into your paper (CWYW)

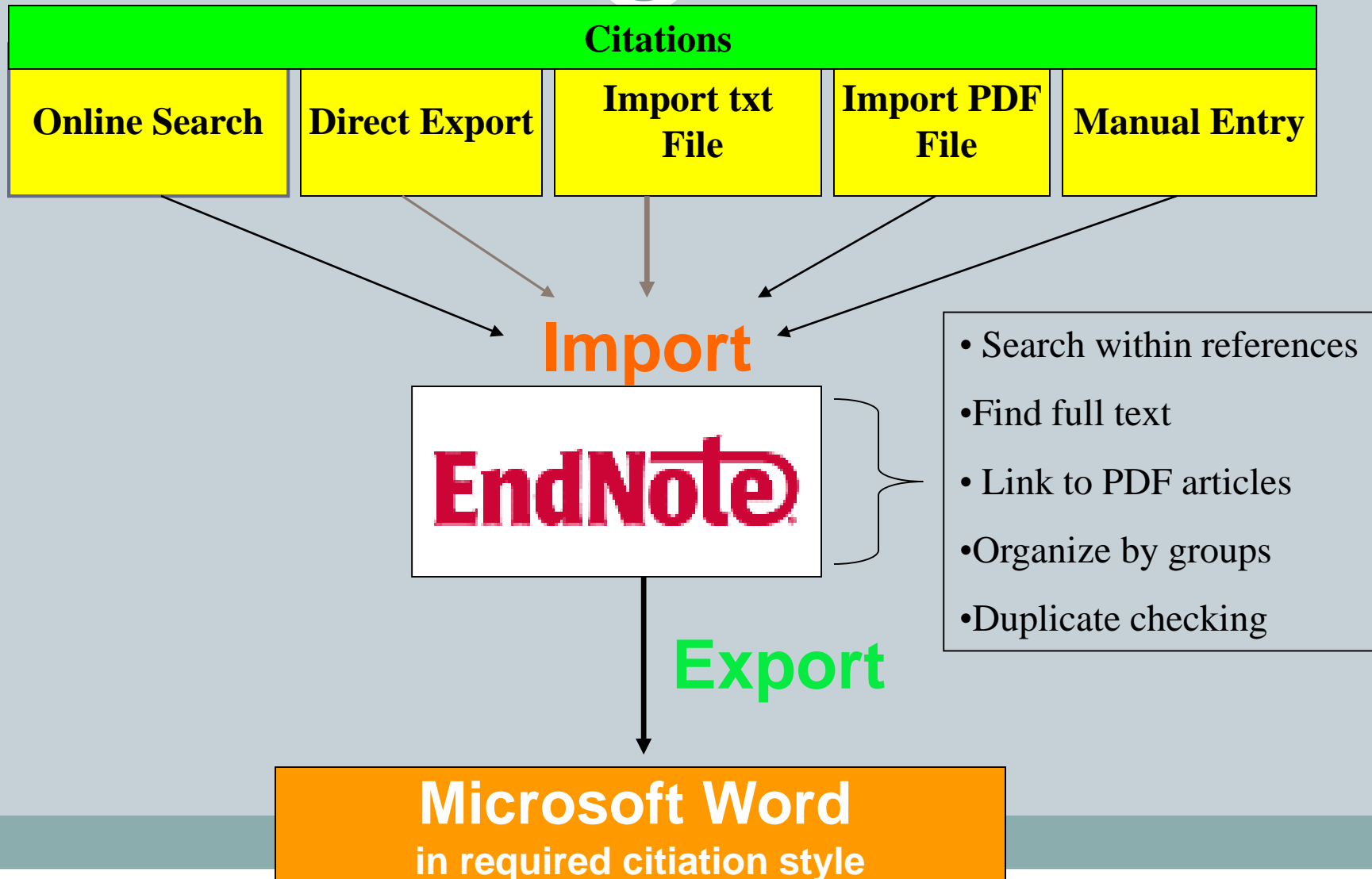
# What is **EndNote** ?

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- **Stores** and organizes references found from many sources
- **Inserts** these citations into a Word document, and
- Automatically **format** your references according to a predefined citation style

# EndNote Flowchart

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# Software & Hardware Requirements

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## Software Requirements:

- Windows XP SP3, Vista , 7 or 8 with latest service packs
- Microsoft Word 2003, 2007 , 2010 or 2013

## Hardware Requirements:

- Pentium 450 MHz or faster processor
- At least 180MB hard disk free space
- Minimum of 256 MB RAM
- Internet or LAN connections

# Endnote X7 Installation Guide

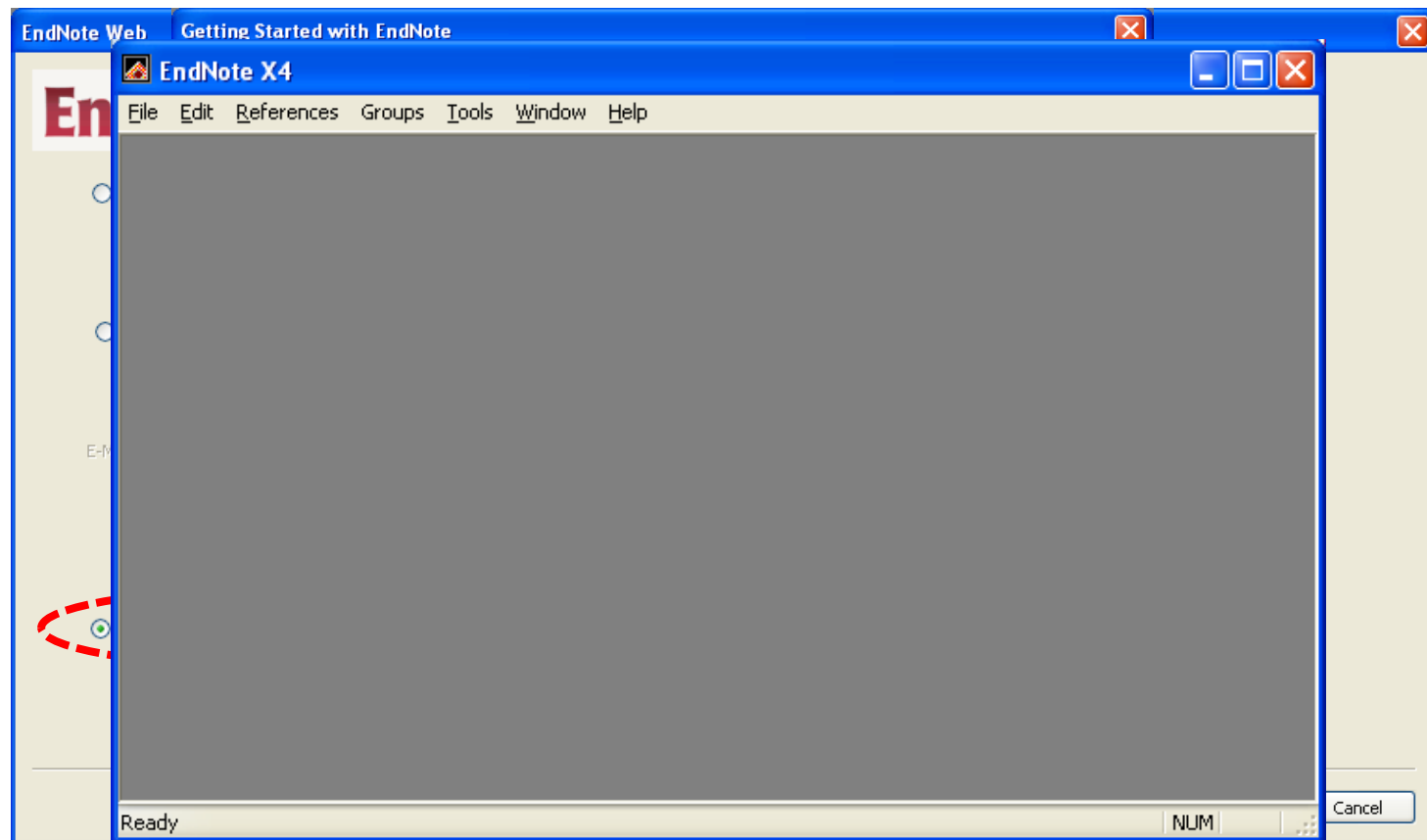
6

- Run **ENX710Inst\_v17.1.0.7705.exe** file from **Endnote X7** Folder
- After installation, copy the **EndNote.exe** file from **Crack** folder in the installation place: **C:\Program Files(x86)\EndNote X7**
- Then copy files from **Connections**, **Templates**, **Filters** and **Styles** folders and paste them in appropriate folders with same names in the installation place like: **C:\Program Files\EndNote X7**

# Launch EndNote

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- *Start > Programs > EndNote > EndNote Program*



# Library Window

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The screenshot shows the 'Library Window' interface. The top menu bar includes 'File', 'Edit', 'References', 'Groups', 'Tools', 'Window', and 'Help'. Below the menu is a toolbar with various icons and a 'Quick Search' field. The main area is divided into three panes:

- Groups Pane (Left):** Contains a tree view with 'My Library' (All References (345), Unfiled (345), Trash (24)), 'My Groups' (Book (15), FLV (60), powerlab (2)), 'Online Search' (Center for Res... (0), Lib... of Gen... (0), LISTA (EBSCO) (0), ProAros (0), PubMed (NLM) (0), Singapore Poly... (0), Web of Scienc... (0)), and 'Find Full Text'.
- References List Pane (Center):** A table listing references with columns: Author, Year, Title, Journal, Reference Type, and Last Updated. The first row is highlighted in blue.
- Tab Pane (Bottom):** A preview of the selected reference, showing the title 'Evaluation of 5-ethynyl-2'-deoxyuridine staining as a sensitive', the journal 'Brain Research', and the ScienceDirect logo.

Author	Year	Title	Journal	Reference Type	Last Updated
Zeng, C.; Pan, ...	2010	Evaluation of 5-ethynyl-2'-deoxyuridi...	Brain Res	Journal Article	08/04/2013
Zehr, K. J.; W...	2001	Comparison of myocardial oxygen co...	Eur J Cardio...	Journal Article	08/04/2013
Yang, D. J.; H...	2007	Effects of different steeping methods ...	J Chromato...	Journal Article	08/04/2013
Xu, Lili; Luo, ...	2010	A novel method for blood vessel dete...	BioMedical ...	Journal Article	08/04/2013
Xu, X.; Colecr...	2009	Primary culture of adult rat heart my...	J Vis Exp	Journal Article	27/04/2013
Wolff, K. D.; K...	2008	Thiel embalming technique: a valuabl...	Microsurgery	Journal Article	08/04/2013
Wilson, K.; Yu...	2008	In vitro and in vivo bioluminescence r...	J Vis Exp	Journal Article	27/04/2013
Whishaw, I. ...	2008	Use of roto...	J Vis Exp	Journal Article	08/04/2013
Watkins, K. H...	2009	A rapid high-throughput method for ...	J Vis Exp	Journal Article	08/04/2013
Wang, X.; Yan...	2008	In vitro differentiation of mouse emb...	J Vis Exp	Journal Article	08/04/2013
Wang, F.; Wu...	2006	The sensitive fluorimetric method for...	J Fluoresc	Journal Article	08/04/2013
Vogler, G.; Oc...	2009	Visualizing the beating heart in Dros...	J Vis Exp	Journal Article	27/04/2013
Vinegoni, C.; ...	2009	Born normalization for fluorescence ...	J Vis Exp	Journal Article	27/04/2013
Venditti, P.; ...	2000	Effect of vitamin E on the response to...	Life Sci	Journal Article	08/04/2013
Van Campen...	2006	A novel method to quantify in vivo tr...	Clin Chim A	Journal Article	08/04/2013

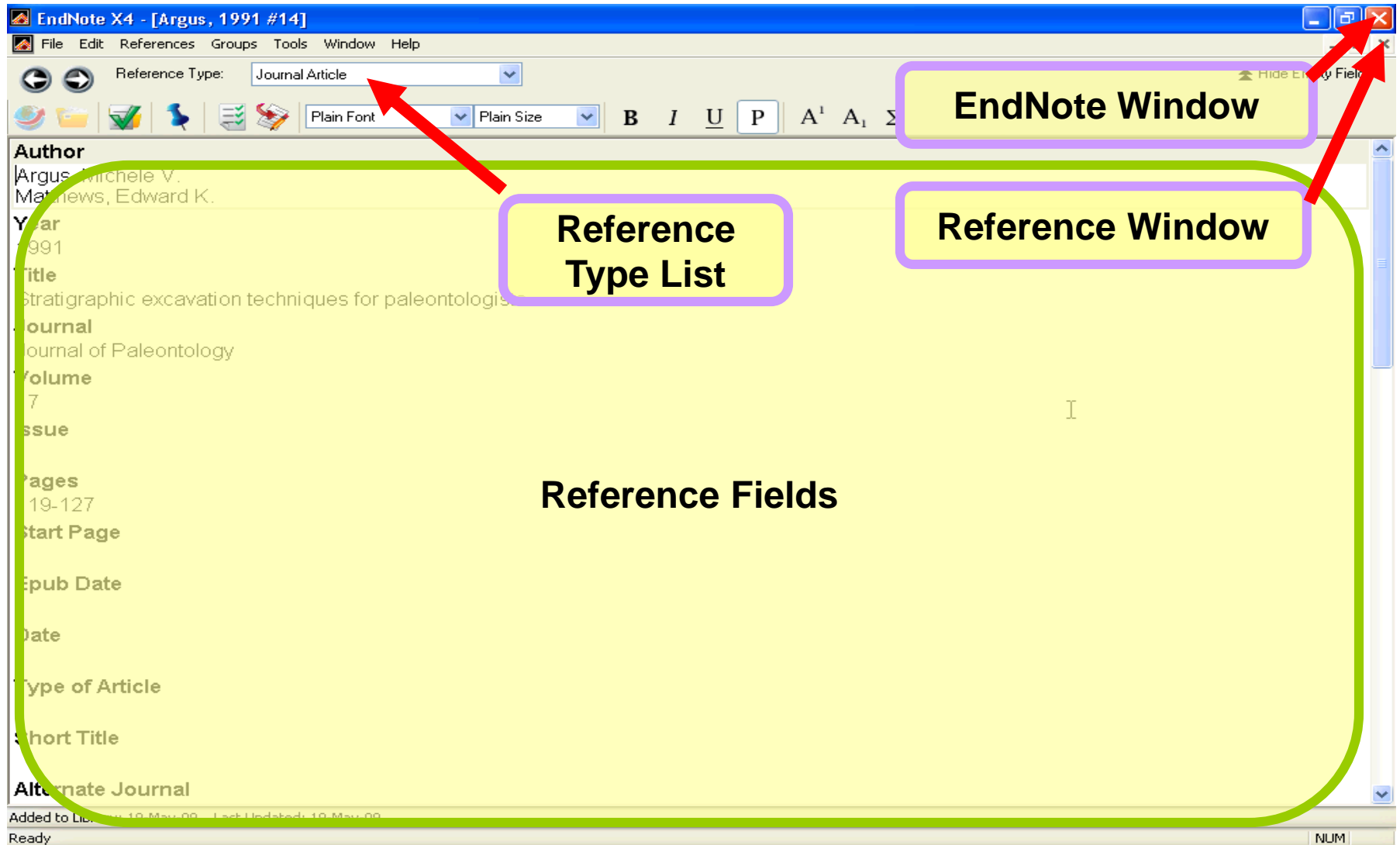


# Reference Window

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- Stores the information required to cite it in a bibliography & other information (e.g. keywords, notes, abstract)
- Automatically assigned a unique record number pertaining to the library that cannot be changed
- 45 different reference types + 3 unused reference types
- Up to 52 fields per reference
- Text should remain as “plain text”, unless special term or character
- 45 files in the File Attachment field
- Only 1 graphic or file in the Figure field
- Automatically saved when it is closed

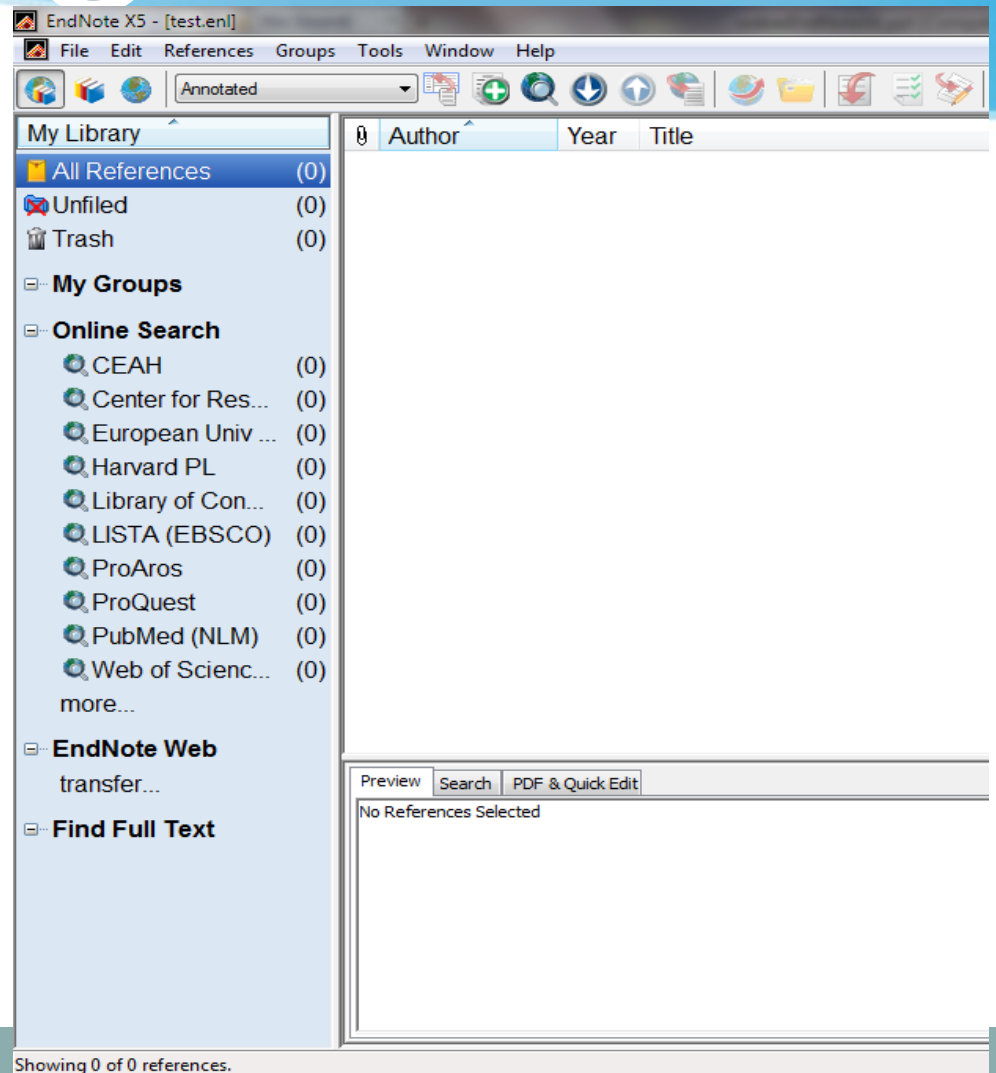
# Reference Window



# Create a Library

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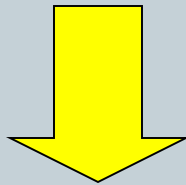
- *File > New...*
- Key-in the library filename (\*.enl)
- Select location to save the library
- Click “**Save**” to create the new library



# EndNote Library (files needed)

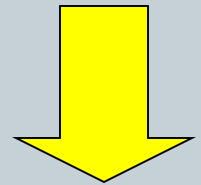
12

.ENL file  
e.g. test.enl



EndNote Library references

.DATA folder  
e.g. test.data



Contains figures, groups, pdf

Portable to be placed in same directory

# Inserting References

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Overview

EndNote Library

**References**

Cite While You Write

Other Features

- Online Search
- Direct Export
- Import Text File
- Import PDF File
- Manual Data Entry

# Online Search

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The screenshot displays the EndNote X4 interface. On the left, the 'My Library' pane shows a hierarchical list of categories. The 'Online Search' category is expanded, and 'Nat U of Singapore' is selected. The main pane shows a table of search results from the National University of Singapore library catalogue. The table has columns for Author, Year, Title, Journal, and Ref Type. A red arrow points from the 'Online Search' section in the left pane to the search results table.

Author	Year	Title	Journal	Ref Type
Boden	1996	Artificial intelligence		Book
Dastbaz	2002	Designing interactive multimedia systems		Book
Imaz	2007	Designing with blends : conceptual foundations of human-computer interactio...		Book
Faulkner	1998	The essence of human-computer interaction	The essenc...	Book
Levitin	2002	Foundations of cognitive psychology : core readings		Book
Salvendy	1997	Handbook of human factors and ergonomics		Book
	1985	Human-computer interaction		Generic
	1988	Human-computer interaction		Book
Dix	1999	Human-computer interaction		Book
	1992	Human computer interaction		Book

Showing 10 of 10 references in Group. (All References: 114)  
Ready

# Direct Export

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The screenshot displays the EndNote X4 interface with the following components:

- Left Sidebar (My Libr...):** A tree view showing library groups. The 'Imported Referenc...' group (5) is highlighted with a red arrow. Other groups include 'All References (100)', 'Unfiled (12)', 'Trash (0)', 'Paleontology' (with sub-groups: Earth Studies (38), Eocene (4), Excavation (6), Fossils (3)), 'Bats' (with sub-groups: Chiroptera (23), Echolocation (7), Sonar (5)), 'Abstract Art' (with sub-group: Ab. Expressi... (17)), 'Online Search' (with sub-groups: Library of Con... (0), Natl U of Singa... (0), PubMed (NLM) (0)), 'EndNote Web', and 'Find Full Text'.
- Main Reference List:** A table with columns: Author, Year, Title, Journal, Ref Type, URL, and Last Updated. The first reference is highlighted with a red arrow.
- Right Sidebar:** A vertical panel with a 'Next >' button, a dropdown menu, and a 'Citations' section showing counts for various categories (0, 0, 1, 0, 1, 0).
- Bottom Panel:** A preview area with tabs for 'Preview', 'Search', and 'Quick Edit'. It currently shows 'No References Selected'.
- Status Bar:** At the bottom, it indicates 'Showing 5 of 5 references in Group. (All References: 100)' and 'Ready'.

Author	Year	Title	Journal	Ref Type	URL	Last Updated
Xu, R.; Chen...	2012	Makespan minimization on single bat...	Computers ...	Journal Arti...	http://www.scopus...	01-Sep-11
le Mast, J...	2011	The tactical use of constraints and str...	Omega	Journal Arti...	http://www.scopus...	01-Sep-11
Sai, N. C.; L...	2011	Interaction between cardiovascular s...	Applied Ma...	Journal Arti...	http://www.scopus...	01-Sep-11
Greco, S.; K...	2011	Selection of a representative value fu...	Computers ...	Journal Arti...	http://www.scopus...	01-Sep-11
Velasquez-C...	2011	General asset management model in...	Electric Po...	Journal Arti...	http://www.scopus...	01-Sep-11

# Import Text File - PubMed

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The screenshot displays the EndNote X4 interface with the title bar 'EndNote X4 - [Sample\_Library\_X4.enl]'. The menu bar includes File, Edit, References, Groups, Tools, Window, and Help. The toolbar contains various icons for file operations and a 'Quick Search' dropdown. The left sidebar, titled 'My Libr...', shows a tree view of the library structure. The main pane displays a table of references. A red arrow points from the 'Imported References' folder in the sidebar to the first three rows of the table, which are the most recent imports.

Author	Year	Title	Journal	Ref Type	URL	Last Updated
Zadrazil, J.	2011	[Aetiology and a clinical picture of chr...	Vnitř Lek	Journal Arti...		01-Sep-11
Xu, S.	2011	Occupational stress and psychosom...	Work	Journal Arti...		01-Sep-11
Zhang, J.	2011	The Structural Stability of Wild-type H...	J Biomol St...	Journal Arti...		01-Sep-11

Showing 3 of 3 references in Group. (All References: 140)  
Ready



# Import PDF File

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The screenshot shows the EndNote X4 interface with the following components:

- Title Bar:** EndNote X4 - [Sample\_Library\_X4.enl]
- Menu Bar:** File, Edit, References, Groups, Tools, Window, Help
- Toolbar:** Includes icons for file operations and a 'Quick Search' dropdown.
- Left Panel (My Libr...):**
  - All References (140)
  - Imported References (2) - **Selected**
  - Unfiled (52)
  - Trash (8)
  - My Searches**
    - Artificial Intelligence (0)
  - Paleontology**
    - Earth Studies (38)
    - Eocene (4)
    - Excavation (6)
    - Fossils (3)
  - Bats**
    - Chiroptera (23)
    - Echolocation (7)
    - Sonar (5)
  - Abstract Art**
    - Ab. Expressionism (17)
  - Online Search**
    - Library of Congress (0)
    - Natl U of Singapore (0)
    - PubMed (NLM) (0)
    - more...
  - EndNote Web**
    - transfer...
  - Find Full Text**
- Reference List:**

Author	Year	Title	Journal	Ref Type	UF
0		<How Readers Navigate to Scholarly Content.pdf>		Journal Arti...	
8	2009	One box to search them all: Implementing federated search at an academic li...	Library Hi T...	Journal Arti...	
- Bottom Panel:** Preview, Search, Quick Edit tabs. Text: 'No References Selected'.
- Status Bar:** Showing 2 of 2 references in Group. (All References: 140) Ready

A red double-headed arrow points to the first two references in the list, highlighting the 'Imported References' group.

# Manual Data Entry

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- Enter citation by hand.

**EndNote**  
...Bibliographies Made Easy™

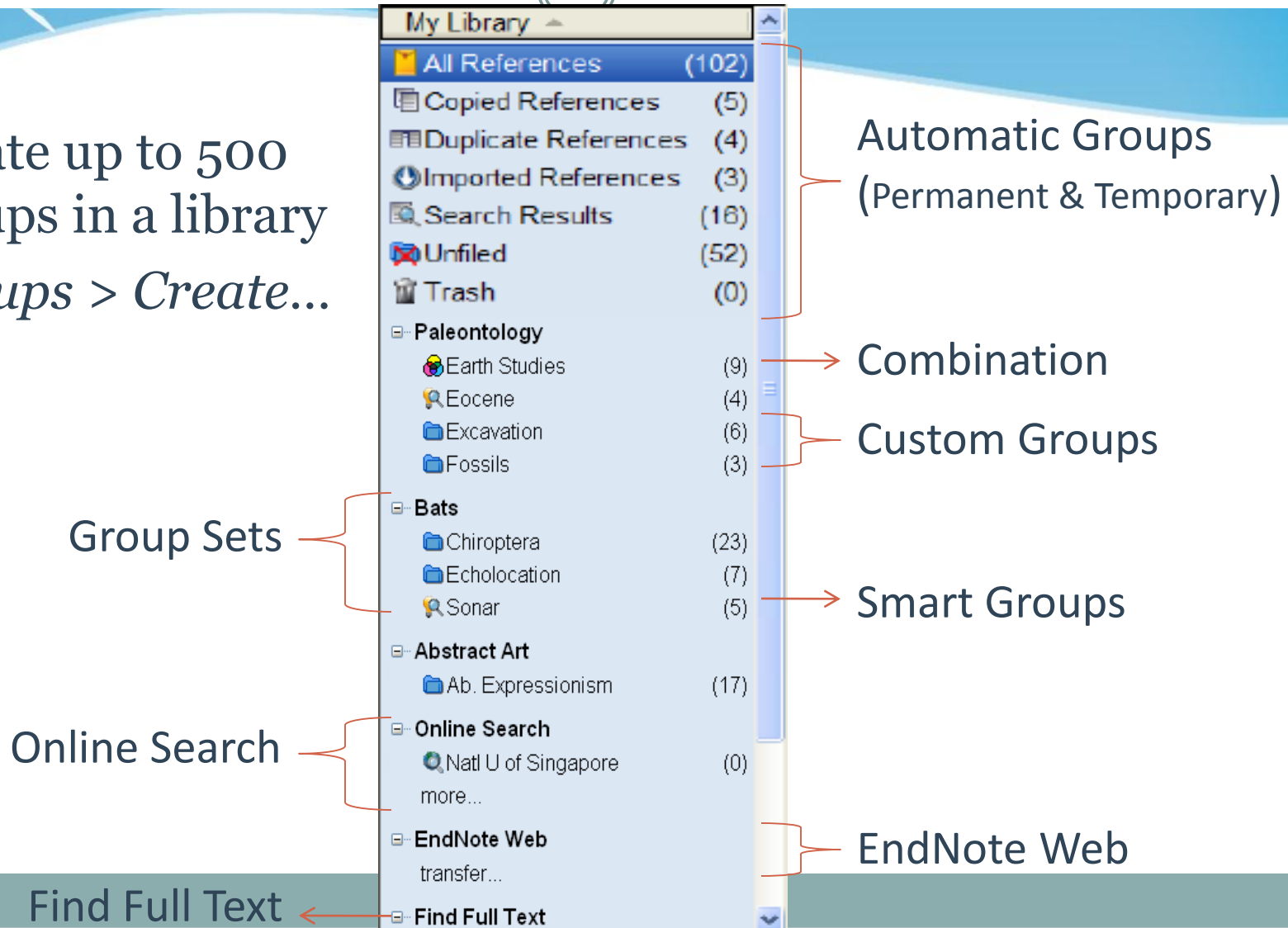
Manual Data Entry



# Groups

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- Create up to 500 groups in a library
- *Groups > Create...*



# Groups – Types of groups

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## Permanent groups\*

**Remains unless  
user removes**

<b>All References</b>	<b>Custom groups</b>	<b>Smart groups</b>	<b>Endnote Web</b>
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## Temp groups\*

**Cleared after  
exiting EndNote**

<b>Imported References</b>	<b>Online Search</b>	<b>Search results</b>	<b>Full text</b>	<b>Duplicate References</b>
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*\* Definition differs from EndNote Manual*

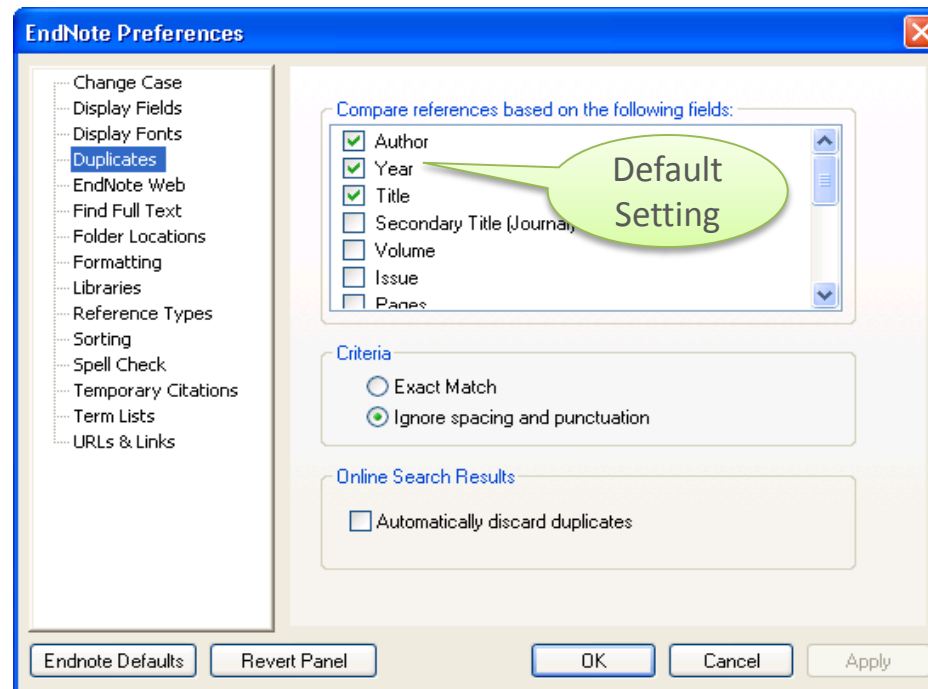
# References and groups

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- Each reference can be in more than 1 group.
- “All reference” group contains every reference (**except those in trash**)
- You can drag and drop references to custom groups and trash (will be deleted when closing EndNote Library).
- Deleting the whole group only removes the reference from that group and not the library.
- Deleting reference from any group (except custom group) will delete reference from library!

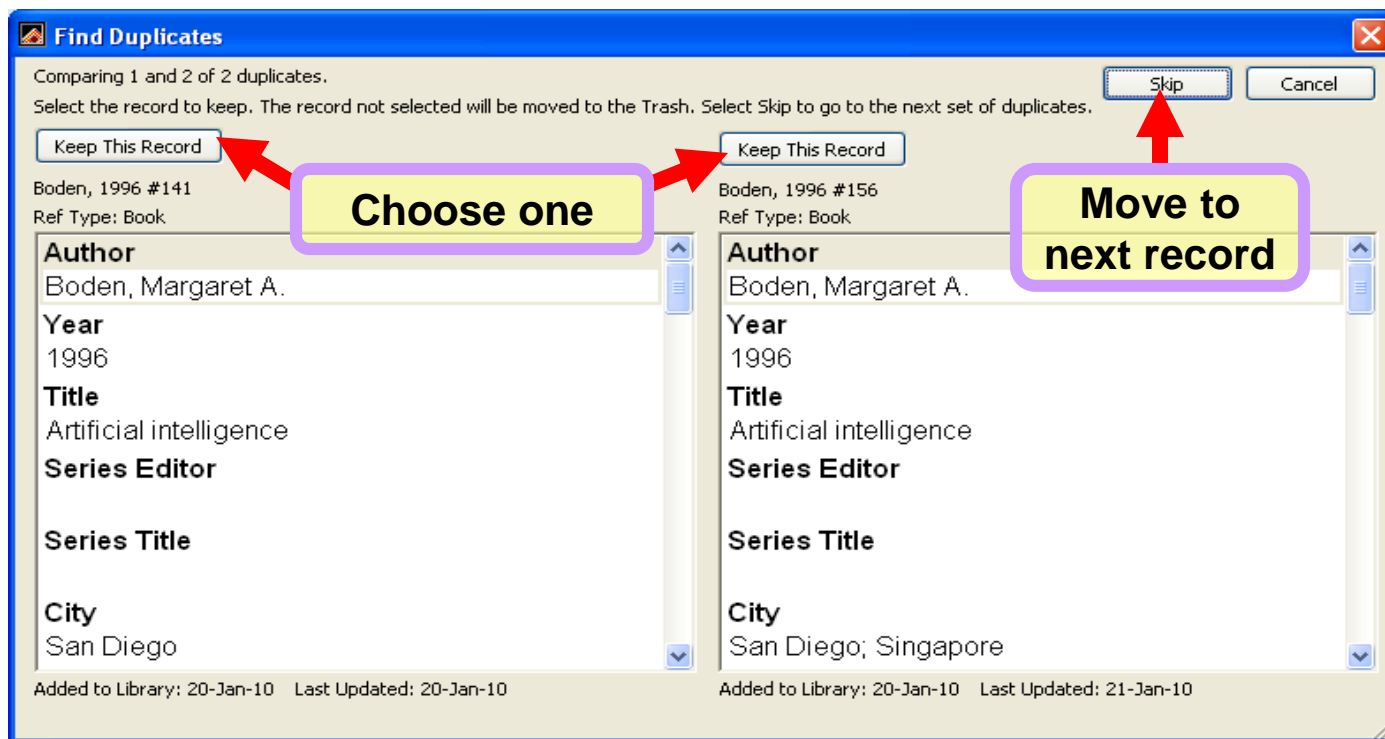
# Find Duplicates

- Locate duplicate references
- To set criteria:
  - *Edit > Preferences... > Duplicates*



# Find Duplicates

- To find duplicate:
  - *References > Find Duplicates*



# Search within reference

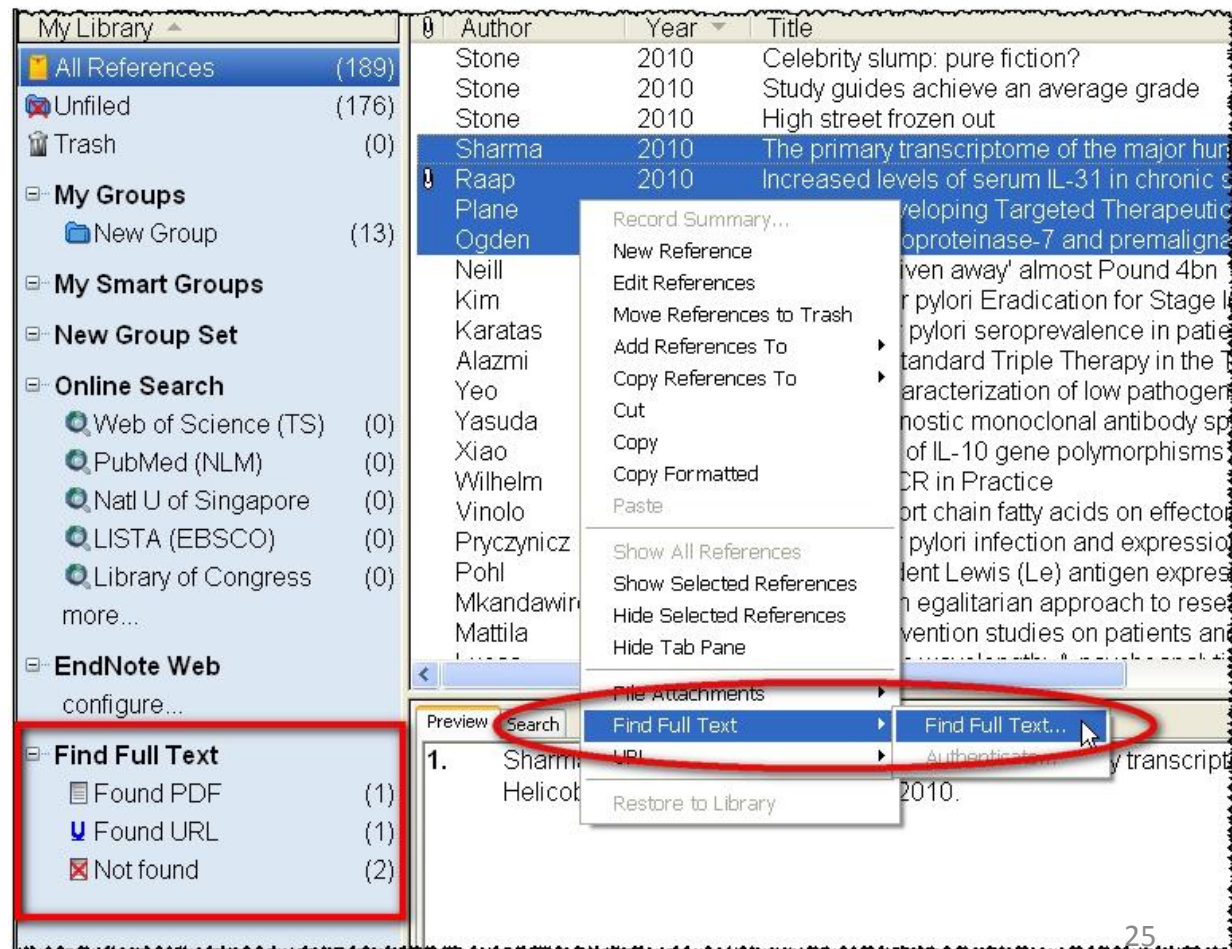
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- Allows you to search within whole library or within groups.
- Click on any group to search within group, or select “add to showing reference” to search whole library and add to current references.
- Results will be displayed in the temp. “Search group”
- You can save/load searches, or convert a search to a smart group (see later)
- Creates/fills temporary “Search results” group.



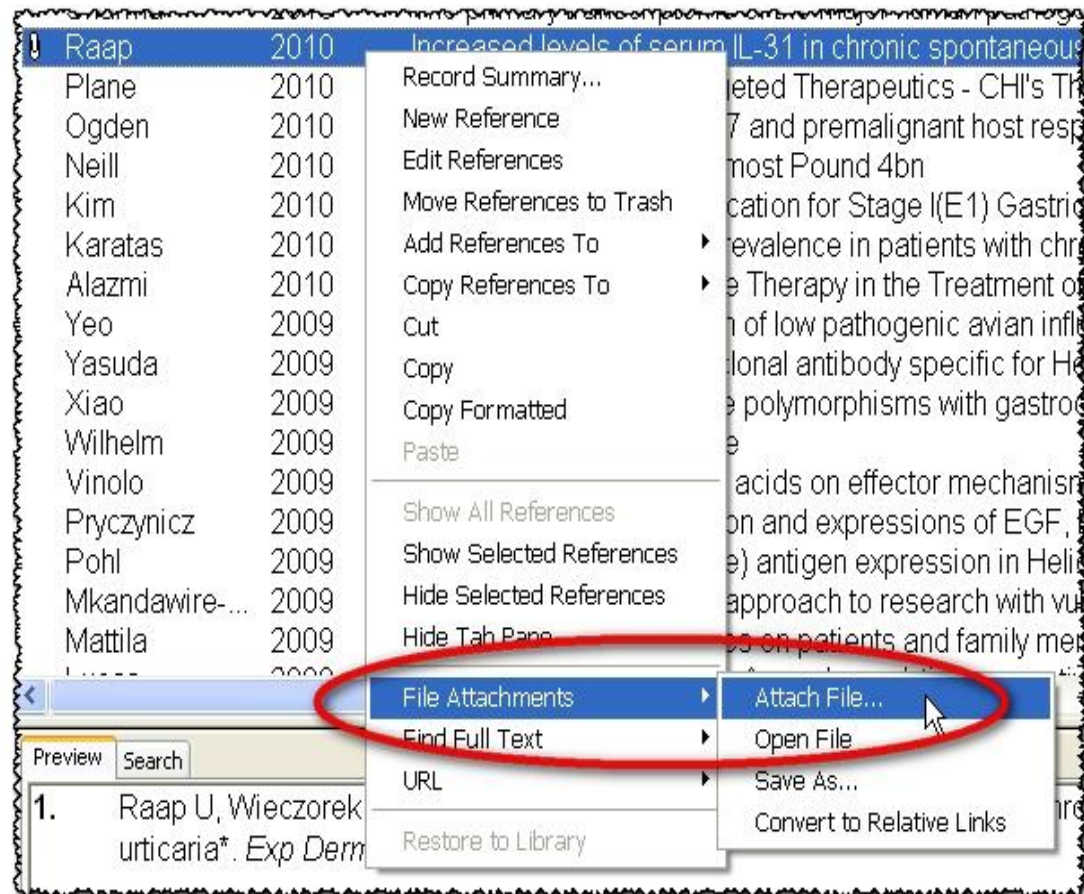
# Find Full-Text

- Search the Internet for freely available full-text



# Attach Files

- Attach files (e.g. full-text PDF) to an EndNote reference
- *References > File Attachments > Attach Files...*
- This will copy the pdf into the .DATA folder and link to that file.
- Increases portability.



# Cite While You Write (CWYW)

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***ADDING CITATIONS  
TO  
YOUR PAPER***

# Cite While You Write

- CWYW Toolbars in Microsoft Word
- Find & Insert Citations
- Customize Citations
- Additional CWYW Features

Overview


EndNote Library

References

**Cite While You Write**

Other Features

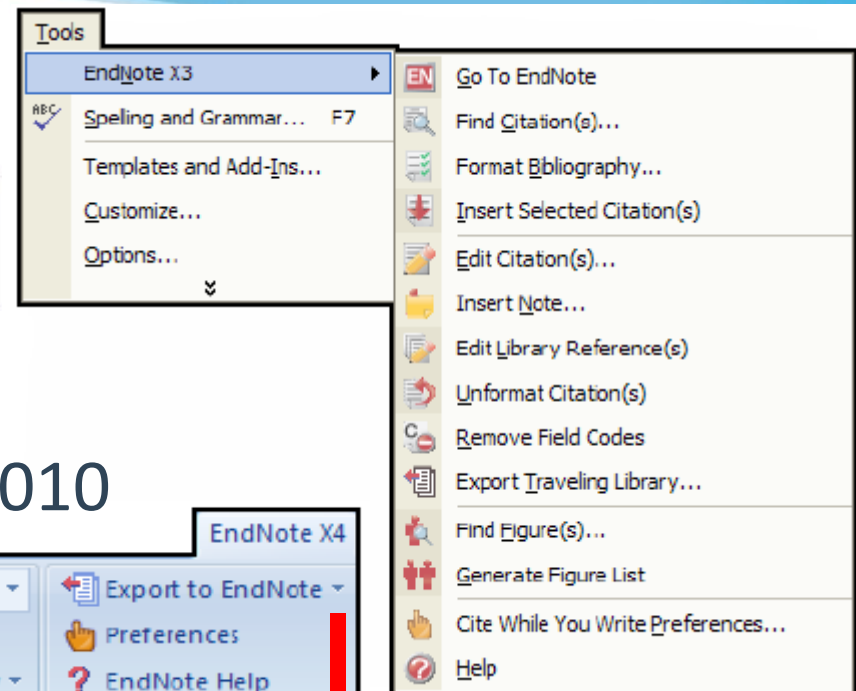
# CWYW Toolbars in Microsoft Word

- Easily and quickly cite *references, figures & tables*, and create a paper with properly *formatted citations, a bibliography, figures & tables*
- **DO NOT** edit the citations and bibliographies in Word Processor. Edit the reference in the EndNote Library ONLY
- To locate citation and bibliography fields, change the Microsoft Word's **Field Shading** option  
 > Word Options > Advanced > Show document content > Field shading > change from “When selected” to “Always” [Word 2007]

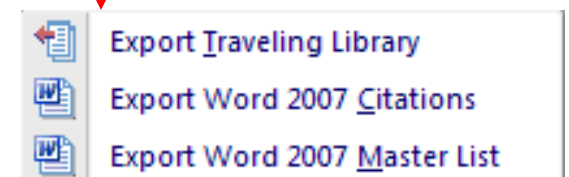
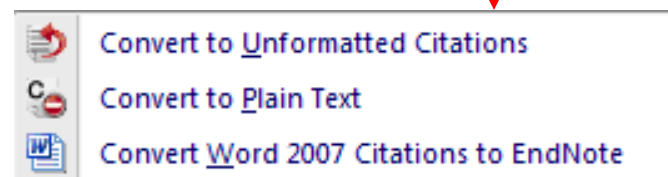
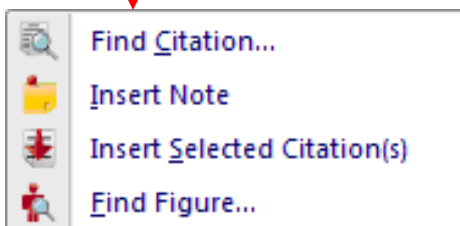
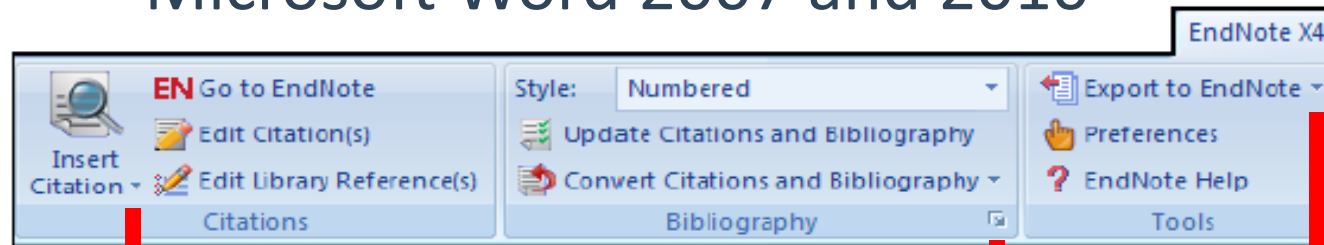


# CWYW Toolbars in Microsoft Word

- Microsoft Word 2003



- Microsoft Word 2007 and 2010

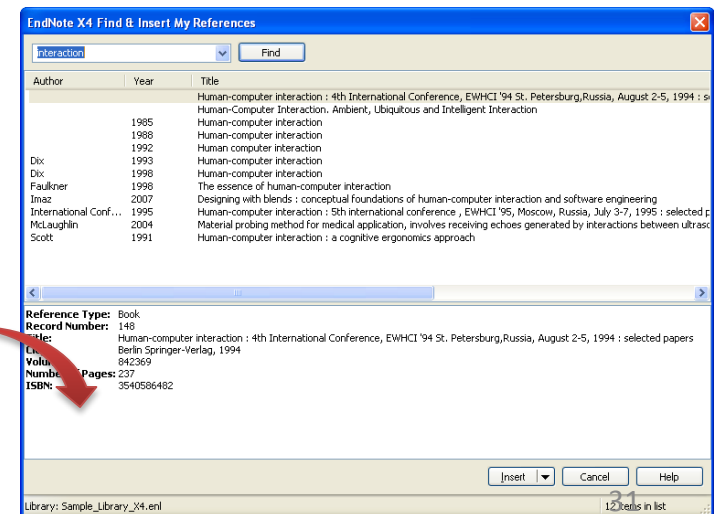
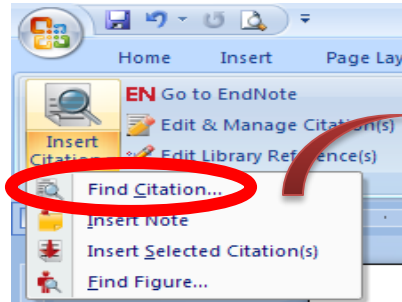


# Find & Insert Citations

## Find Citation...



- Search for EndNote references to select and insert as citations in Word document.
  1. Open EndNote library
  2. Open Word document and place cursor at the location for citing
  3. In Word: *EndNote X5* Tab > *Citations* Group > *Insert Citation* > *Find Citation...*
  4. Enter text/keywords
  5. Click *Find* to search for matching references
  6. Select the intended reference(s)
  7. Click *Insert* to cite

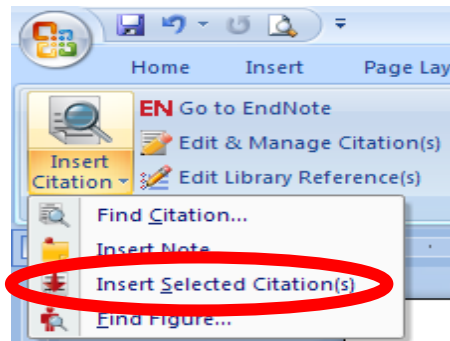


# Find & Insert Citations

## Insert Selected Citation(s)



- Insert the references selected in EndNote into document at the location of the Word cursor.
  1. Open EndNote library and select the reference(s) that would like to cite
  2. Open Word document and place cursor at the location for citing
  3. In Word: *EndNote X5* Tab > *Citations* Group > *Insert Citation* > *Insert Selected Citation(s)*
  4. The reference(s) is cited at the location specified

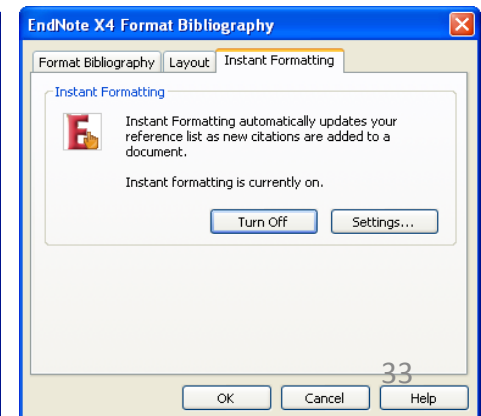
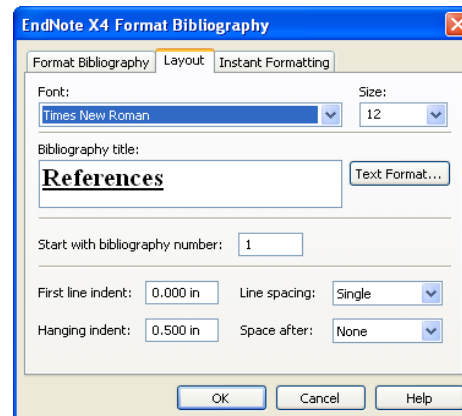
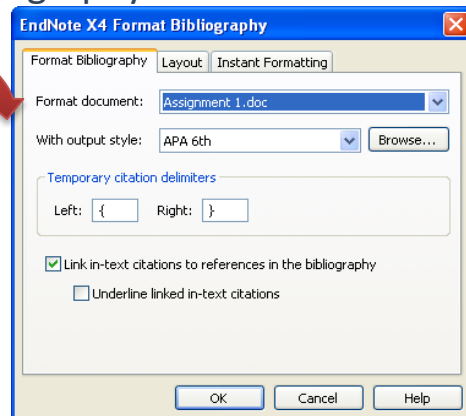
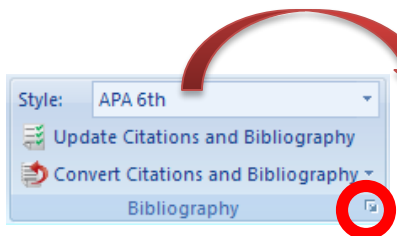




# Customize Citations

## Format Bibliography

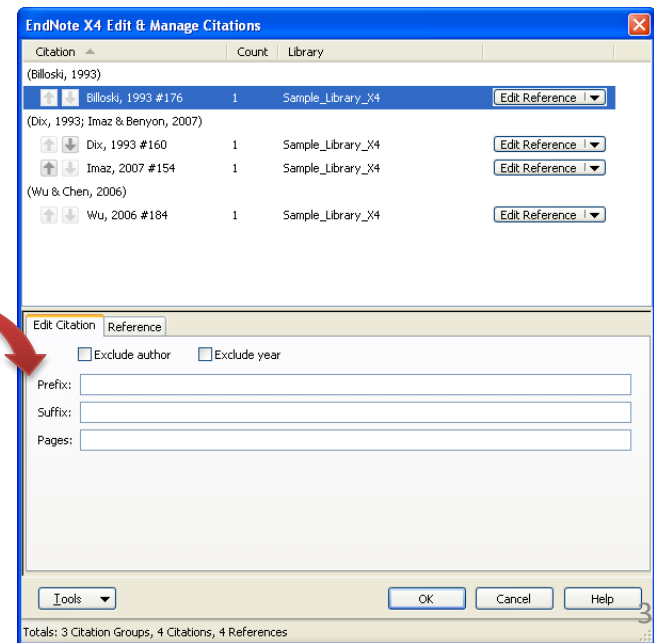
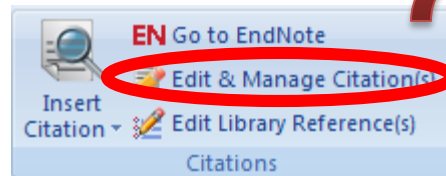
- Change or verify the style and layout of the bibliography
  1. In Word: *EndNote X5* Tab > *Bibliography* Group > Click-on corner arrow
  2. Able to:
    - a. Format Bibliography – change output style, temporary citation delimiters, and **in-text citations linkage**
    - b. Layout – configure font type and size, spacing, indentation, etc.
    - c. Instant Formatting – enable for automatically formatting citations and updating the bibliography



# Customize Citations

## Edit & Manage Citation(s)

- Make any changes inside a citation, such as adding page numbers or removing author names from author-date citations.
  1. In Word: *EndNote X5* Tab > *Citations* Group > *Edit & Manage Citation(s)*
  2. Able to:
    - a. Edit Reference – insert and remove citation
    - b. Exclude author & Exclude year
    - c. Prefix, Suffix & Pages
    - d. Citation display order



# Customize Citations

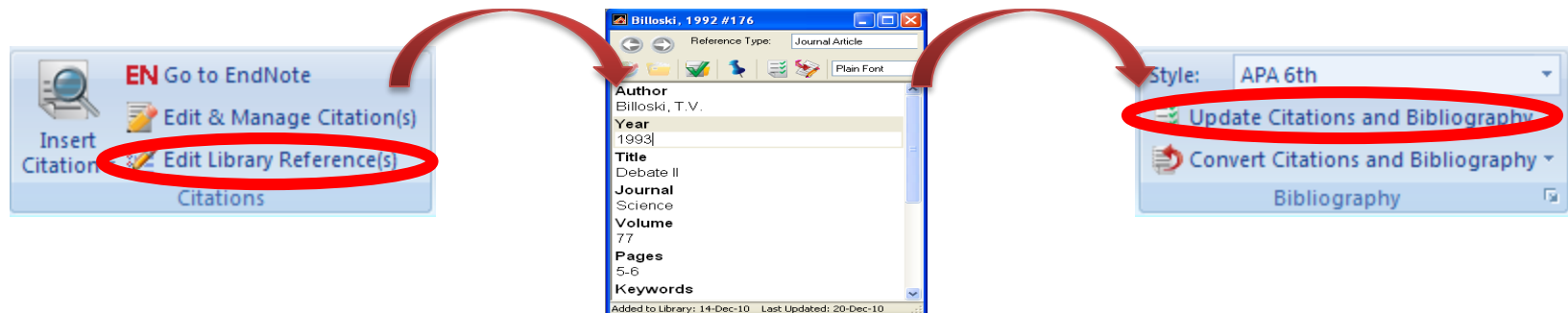
Edit Library Reference(s)



Update Citations and Bibliography



- Edit the corresponding references in EndNote directly for any selected citation. Update in-text citations and bibliography for any changes.
  1. Place cursor at the in-text citation to be updated
  2. In Word: *EndNote X5* Tab > *Citations* Group > *Edit Library Reference(s)*
  3. Screen switch to EndNote library, make necessary changes and close the Reference window
  4. To update the display, in Word: *EndNote X5* Tab > *Bibliography* Group > *Update Citations and Bibliography*

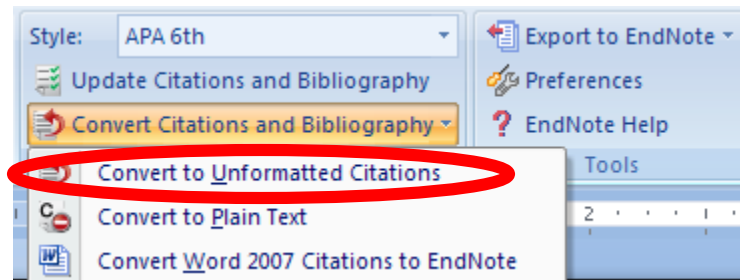


# Additional CWYW Features

## Convert to Unformatted Citations

- Revert formatted citations to temporary citations, removes the bibliography, and turns off instant formatting.
  1. In Word: *EndNote X5* Tab > *Bibliography* Group > *Convert Citations and Bibliography* > *Convert to Unformatted Citations*
  2. To change back to formatted citations, in Word: *EndNote X5* Tab > *Bibliography* Group > *Update Citations and Bibliography*

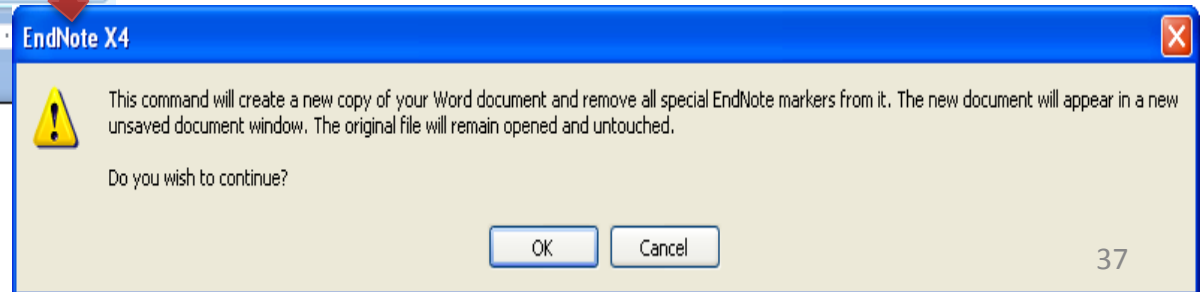
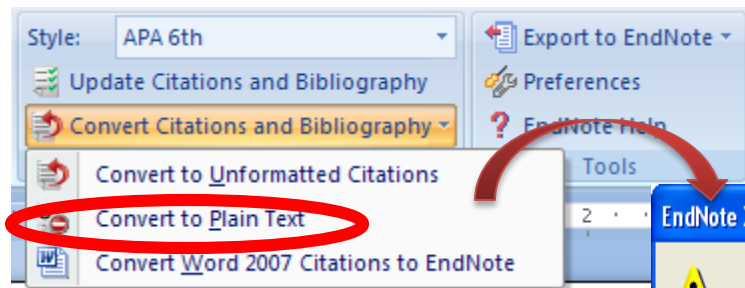
(Heller, 2008)  {Heller, 2008 #144}



# Additional CWYW Features

## Convert to Plain Text

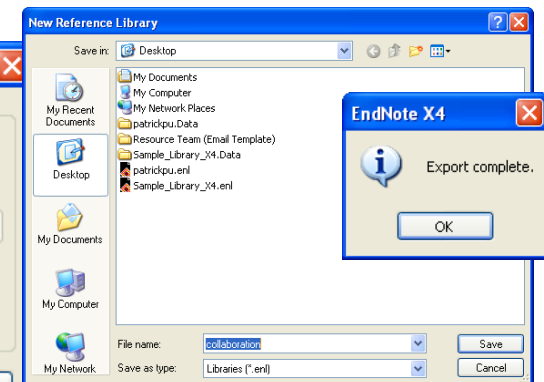
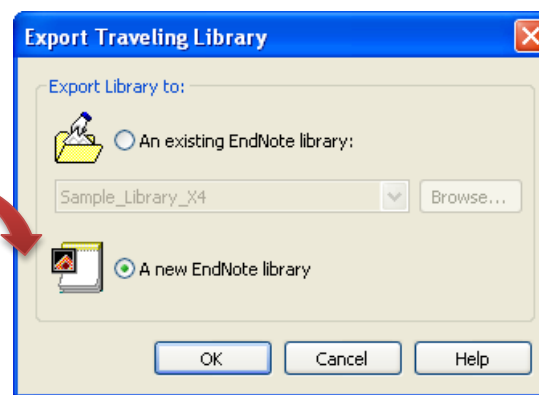
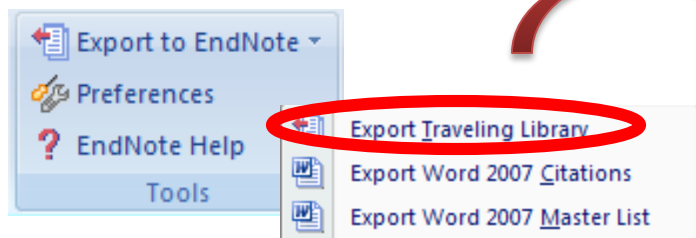
- Save a copy of the document and convert formatted fields to regular formatted text.
  1. In Word: *EndNote X5* Tab > *Bibliography* Group > *Convert Citations and Bibliography* > *Convert to Plain Text*
  2. Click *OK*
  3. A new Word document will be created with no field codes



# Additional CWYW Features

## Export Traveling Library

- Export the references (exclude Notes, Abstract, Figure & Caption) in this traveling library to a regular EndNote library.
- Hidden “traveling” library containing only the references used.
  1. In Word: *EndNote X5* Tab > *Tools* Group > *Export to EndNote* > *Export Traveling Library*
  2. Select *A new EndNote library*
  3. Click *OK*
  4. *Save the new library*
  5. Click *OK*



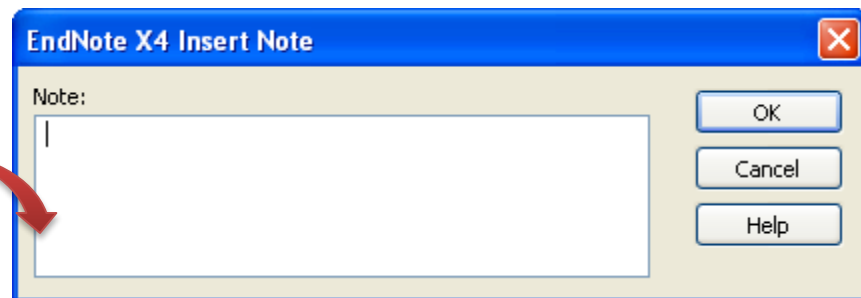
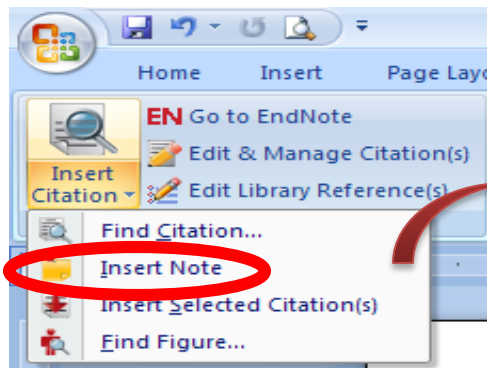


# Additional CWYW Features

## Insert Note



- Insert explanatory notes to be numbered as though they were bibliography entries, and then placed in the bibliography.
  1. Place cursor at the location for inserting note
  2. In Word: *EndNote X5* Tab > *Citations* Group > *Insert Citation* > *Insert Note*

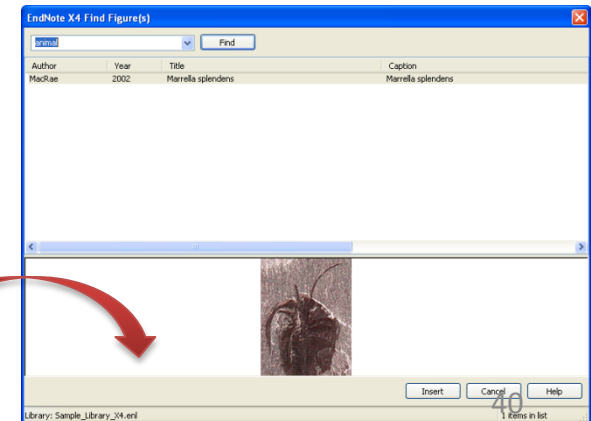
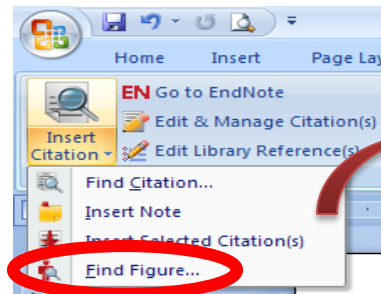


# Additional CWYW Features

## Find Figure...



- Search for an EndNote reference that contains an image, and insert a figure or table citation in Word.
- The citation is numbered, and the figure or table is automatically added to the document
  1. Place cursor at the location for figure
  2. In Word: *EndNote X5* Tab > *Citations* Group > *Insert Citation* > *Find Figure...*
  3. Enter text/keywords
  4. Click *Find* to search for matching records
  5. Select the intended record(s)
  6. Click *Insert*



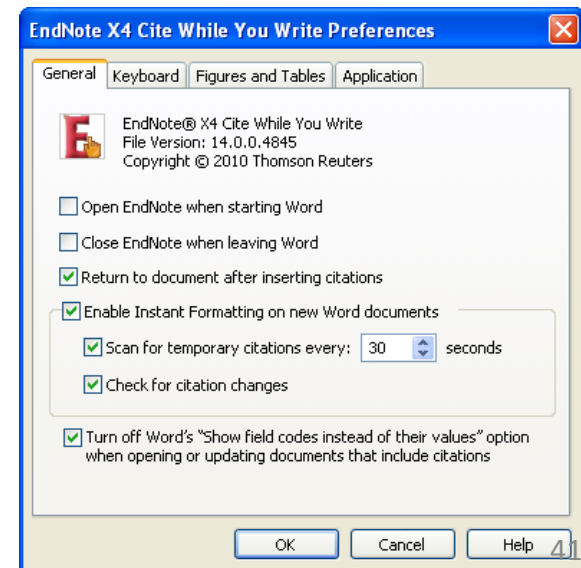


# Additional CWYW Features

## Preferences



- Set preferences for EndNote's cite while you write settings for future documents.
- Note: If you use Word as your e-mail editor in Microsoft Outlook, you should leave the *"Open EndNote when starting Word"* option in the CWYW preferences unchecked.





# Other Features

- Backup Libraries
- Recover Library
- Find Duplicates
- Find Full-Text
- Attach Files
- EndNote Web
- Re-Install via Software Catalogue

Overview

EndNote Library

References

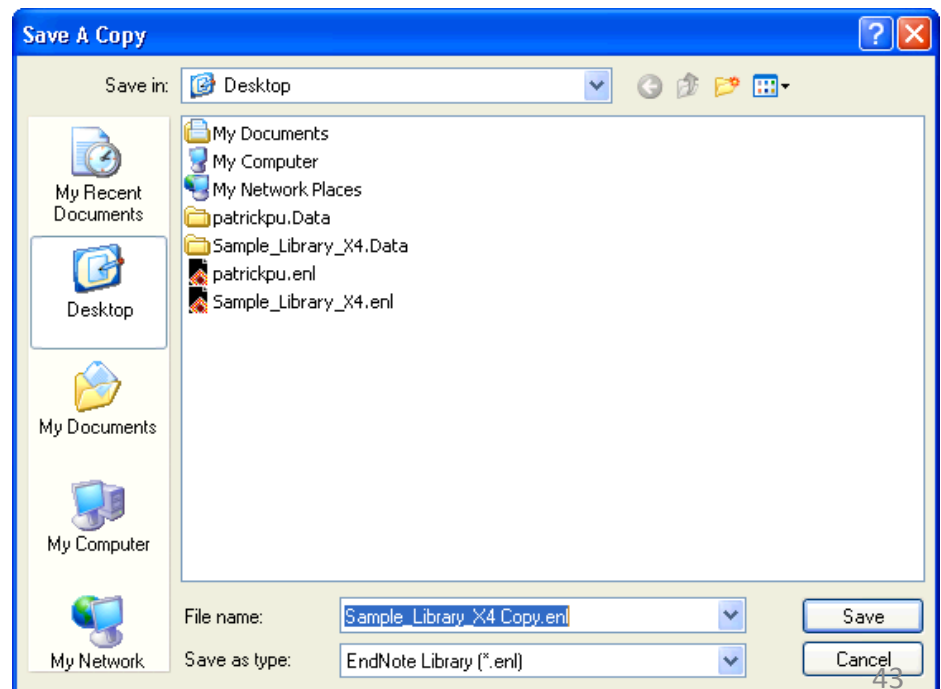
Cite While You Write

**Other Features**

Installation Issues

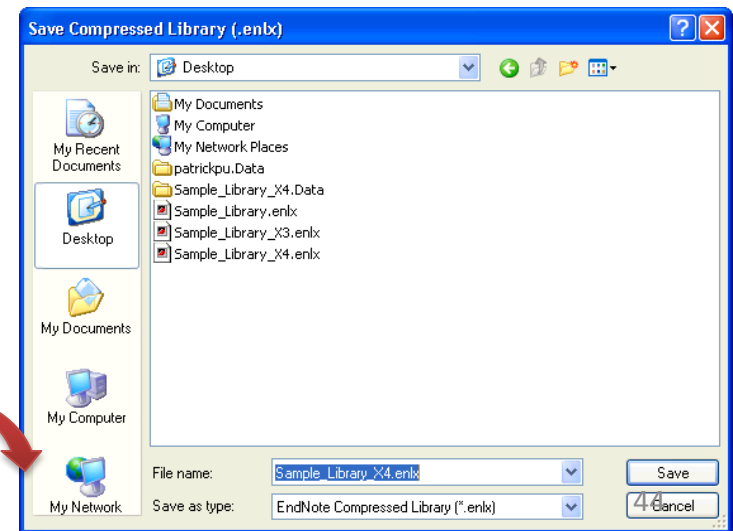
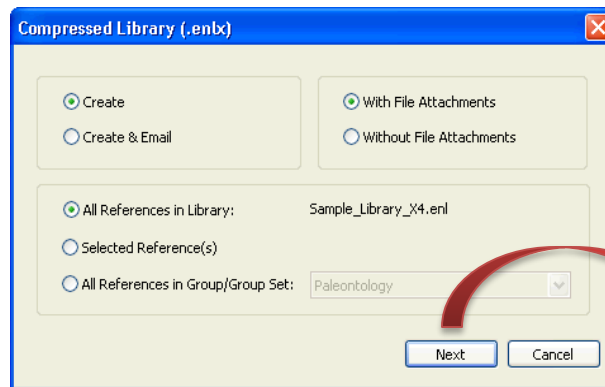
# Backup Libraries

- Option 1: Save a Copy
  - Create an exact copy of the library, including [library name].DATA folder
  - *File > Save a Copy...*



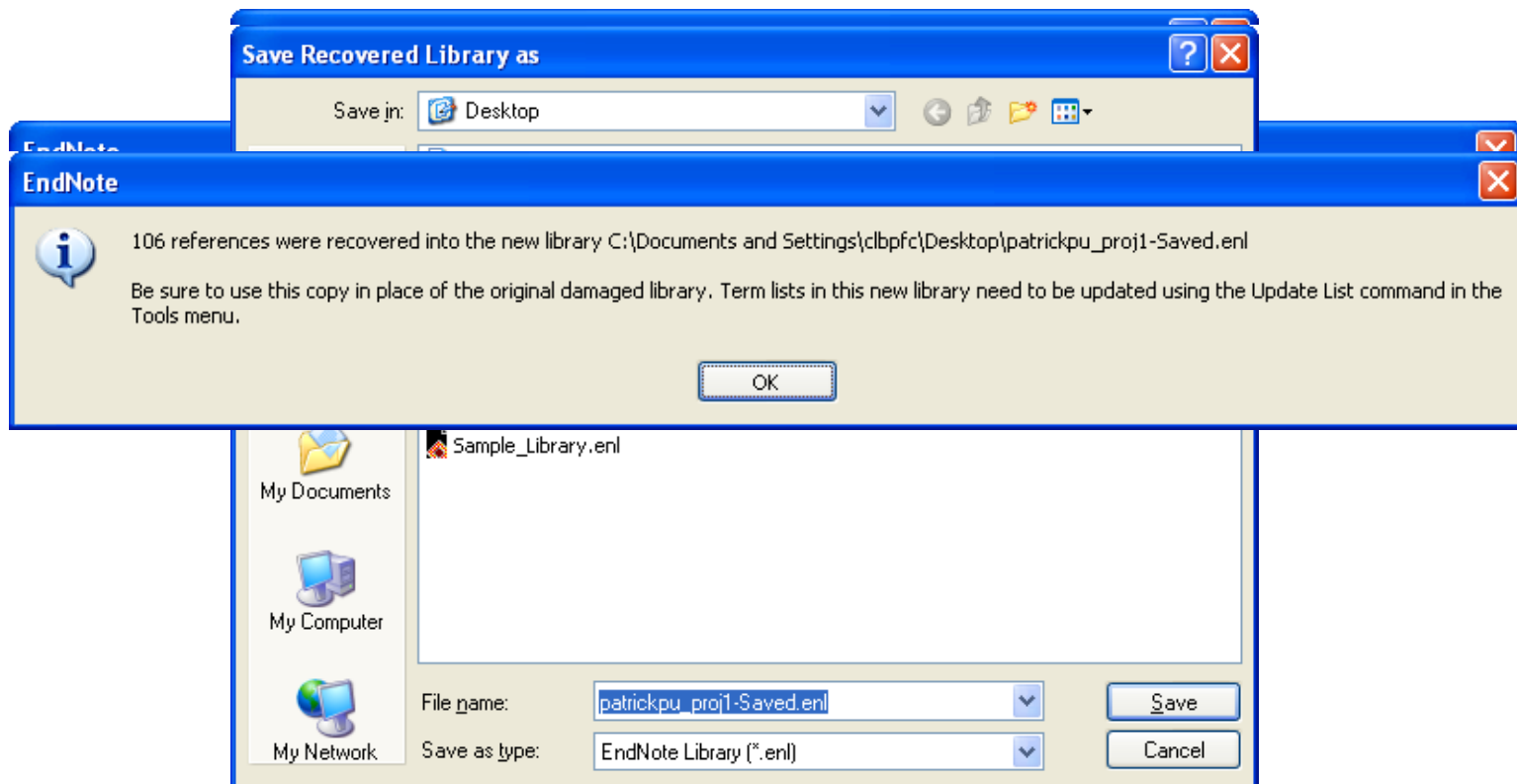
# Backup Libraries

- Option 2: Compressed Library
  - Save the complete library to a single compressed file, including [library name].DATA folder
  - To create:
    - *File > Compressed Library (.enlx)...*
  - To restore:
    - *File > Open > Open Library...*



# Recover Library

- Repair the damaged EndNote Library
- *Tool > Recover Library...*



# Rule of using CWYW

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**Do not** manually over-write anything added by EndNote (shaded in grey!)

Any changes **will be automatically removed** by EndNote the next time another citation is added.



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THANK YOU  
Wish you all the best!

