

Introduction to EndNote: Building and Maintaining Your Library

(Revised 5/2004)

I. Intro to EndNote (version 6.0 or higher)

Starting a library—the virtues of having one library

- Starting a new library is as simple as choosing *File...New*.
- One EndNote library can hold 32,000 citations
- Even if you work in several different fields, do not start multiple libraries. Instead use keywords to differentiate your topics (explained below)
- If you are a single user and start multiple libraries, the bibliographies at the end of your papers may not be formatted properly within Word.
- If you use only one library you can set EndNote to open that file every time you open EndNote by choosing *Edit...Preferences...Libraries*. Choose to set the currently open library as the default.
- EndNote marks each citation with a unique database record number. This number is how EndNote identifies citations for the bibliography later.
- If you work for different people, you may want to consider starting multiple libraries, one for each of them.

The reference structure

- To add a new citation to your library by hand, choose *References...New*
- Choosing *References...New* also allows you to see the structure of an individual record.
- When entering a new record, first choose the type of material being cited (e.g. book, chapter, journal article etc.). The information you will enter depends on what type of medium being cited.
- Advanced: What fields are available and what fields display are alterable under *Edit...Preferences...Reference Types*. You can customize the reference structure and add up to 6 personalized fields. Please see the intermediate notes for assistance.

Searching your library

- The easiest way to search by author last name is to simply start typing in the letters in the general display window. EndNote will jump down in your library as it tries to match the name: e.g. type "R" and it will jump down to authors beginning with R.
- If you want to type several of the letters of the last name, you can do that too...simply type them in fast enough that EN knows that you want the letters to appear contiguously: e.g. type "Smi" and it will jump down to (likely) Smith.
- To search your whole library for a subset of articles, choose *References...Search*.
- When using *References...Search*, you may select which field you would like to search in by using the drop down menu. It defaults to "Any field" but each field in EndNote is individually indexed and searchable. Any information you enter into a field can be found later using *Search*.

- Once you have conducted a search you may do several things with the results
 - 1) Export them and mail to a colleague. Choose *Edit...Output Styles...EndNote Export*. After setting this, choose *File...Export* and save the file. This file can now be sent via email to other EndNote (and other bibliographic) users. *NOTE: See below for explanation of output styles.*
 - 2) Produce an annotated bibliography. Choose *Edit...Output Styles...Annotated*. Next choose *File...Print* to send the list to a printer. Alternatively, insert the citations into a Word document (see Intermediate notes for examples of how to do this), then you will have an electronic file and not just a hard copy.
 - 3) "Mark" these as belonging to a particular topic. Once the search has been performed, go back to the search dialog box and choose *Save search*. Give your search a name. This can now be recalled later by doing *Load search*. This is the equivalent of bookmarking these particular citations.

Setting preferences—Duplicates, display fields

- EndNote can automatically search for duplicates every time you import new records into your library. It searches based on certain criteria, which you can change by going to *Edit...Preferences...Duplicates*.
- The way EndNote searches for duplicates is very literal. If there are several authors in one reference and they are all listed, if you try to import the same record with the authors listed as Smith et al. (where they are not all listed) it will think that they are different articles. I find that setting EndNote to NOT match on author is best.
- You can change the fields that display in your EndNote library window. You can display up to 5 fields, and those fields can be resized too depending on your mood. Choose *Edit...Preferences...Display Fields*. Two other good choices are URL and the field where you store information about your citations (such as keyword or notes).

Preview & Show commands

- To see a preview of how your citations will display, choose the *Tools...Show Preview* option. This gives a window at the bottom of the library which shows the highlighted reference in the selected output style. If you set the style to annotated then you can read the abstracts of articles without actually having to open the reference.
- Whenever you import something new into your library, the library window will display only those items. The rest of your stuff is still there, it's just not being shown at the moment. Choose *References...Show All* to see your entire library.
- You can also choose to display only certain items in your library window by selecting them (hold "Ctrl" and click for non-contiguous selections) and then choosing *References...Show Selected*. One reason for doing this is that you may want to print out an annotated bibliography from EndNote of just those references and not your whole library. Or you may want to do a search and replace command on just those citations (see below).
- Be aware that when you have a subset of your library showing in the window that certain commands will only affect those showing at the time.

- You will always know how many references you are displaying by looking in the bottom left hand corner where it will say “Showing x out of x references”

Search & Replace: Adding keywords by using Change Field

- Much like the Word feature of search and replace, EndNote can change large amounts of data easily.
- Create a subset of references by doing a search on your library. Or create a subset by hand by choosing the references you want to highlight and then choosing *References...Show selected*.
- Once only the references showing in the window are the ones you want to change, choose *References...Change and move fields*.
- Which field you choose to put your keyword into depends on your preference. The Notes field is generally under-used and makes a good candidate. The other option is to use the existing keyword field and add your keywords to the bottom of the list. Advanced: A third option is to create your own special "my keyword" field. See the intermediate notes for an explanation of how to do this.
- From the *References...Change and move fields* dialog box, use the drop down menu to select in which field you would like the information stored.
- If you choose keyword and would like to keep the existing data in the field, select an option that allows the current data to stay. Use a semi-colon (;) to separate data.
- If you choose the notes field and do not care about losing any information already in there (most of which is junk) then choose the "replace whole field" option.

Output Styles

- Output styles is one of the three key features of EndNote that makes it so powerful (the other two, connection files and import filters, are dealt with below.)
- EndNote can change the look and feel of your bibliography with just one click. Choose *Edit...Output Styles* to see your choices. Annotated and numbered are several of the generic choices. By choosing *Edit...Output Styles...Open Style Manager* you can choose one of several hundred journal submission styles that are already EndNote enabled. Click each journal you are interested in and these will appear on the short list when you choose *Edit...Output Styles*.
- Advanced: If the journal you would like to submit to does not appear in the list, you may edit one of the existing ones or find out which journal is the same or closest to the one you are trying to emulate. Please see the intermediate notes for an example of how to do this.

II. Downloading Citations

- You can choose to search databases in one of two ways: via the EndNote Connection Files, or directly from online databases. There are advantages and disadvantages of each style. It is actually important to know how to do both.

Connection Files

- Choose *Edit...Connection Files...Open Connection Manager* to see which files are available. The only ones which we will be allowed to access are those that specifically say UCSF or CDL (California Digital Library). Check all that you would like to see on a regular basis and then close the window.
- Choose *Tools...Connect* and choose your option to actually search a database via EndNote. Select your fields and search. Choose Add if you would like to add more lines to your search, i.e. you want to search more than two terms at a time.
- When the search results are displayed, highlight the ones you want to add to your library. This is a good time to add a keyword using the *References...Change and move fields* option (described above). There is a box in the upper right hand of the screen that says "Copy X references to"
- Advantages of this way of searching: easily imported into your library.
- Disadvantages of this way: the search engine is not as powerful

Online Databases: Using the Import Filter Command

- By searching the online databases themselves, you can construct a much more powerful search. This method does require, however, that you save a file after your search and then import it into EndNote.
- Select *Edit...Import Filters...Open Filter Manager*. Choose several that you think you will use, or you can always go back and add more later. Choose PubMed, options listing UCSF, Melvyl or California Digital Library as the sponsor, or CSA for PsycInfo.
- Go to the Internet (use Inside CAPS lit searching at <http://www.caps.ucsf.edu/inside/research/litsearch.html>) and conduct a search using an online database, e.g. CSA's PsycInfo or Pubmed
- For PubMed, save your search using the "Medline" type from the drop down menu labeled "Display". Save the file as a .txt file.
- For PsycInfo, choose the "save/print/email" option from the search display results screen. All of the default options are fine. Proceed to save and name it with a .txt extension.
- To import these files choose *File...Import*. From the dialog box choose the file that you just downloaded. Next make sure you pick the appropriate filter (which database you used). Tell it what you would like to do with duplicates that it finds, like import them into a separate library. Once you click OK, the records should import easily into your library.

Special cases

- If you are lucky enough to need an article from one of the online journals maintained by Highwire Press of Stanford, then you can download the citation and the journal article itself all in one step.
- Use BMJ as an example. [<http://www.bmj.com/>] {Science is another good example}

- After finding the article you need, simply choose “Download to citation manager” from the options at the right-hand side of the screen. Choose EndNote on the next screen. You will be prompted to open it or save it, choose Open it. Then choose the name of the library you would like to put it in, and that’s it.

III. Link features

Linking online articles

- You can do this in two ways. If you already have the article saved in PDF format on your hard drive, then click the reference you want to attach it to, right click and choose *Link to...* and insert the file.
- If you are in Netscape or Internet Explorer and have the URL for the article in the address window, copy the URL from the internet window, then double click the citation to attach it to and paste it into the URL field.
- Documents can be linked in the same way as linking an online article above. Simply right click the mouse, choose *Link to...* and attach the Word document or other file.

Opening linked files

- Regardless of how you attached the file, they can all be opened in the same way. Highlight the reference that has the attachment, right click and choose *Open Link*