EndNote 8

Wouter Gerritsma, Marianne Renkema

© 2005 Wageningen UR Library

EndNote 8

Publisher

Wageningen UR Library

Editors

Wouter Gerritsma
, Marianne Renkema

Chief editor

Annemie Kersten

Version, Versiondate

1.02.03, 2005-11-15

Acknowledgement

© 2005 Wageningen UR Library

Products that are referred to in this document may be either trademarks and/or registered trademarks of the respective owners. The publisher and the author make no claim to these trademarks.

While every precaution has been taken in the preparation of this document, the publisher and the author assume no responsibility for errors or omissions, or for damages resulting from the use of information contained in this document or from the use of programs and source code that may accompany it. In no event shall the publisher and the author be liable for any loss of profit or any other commercial damage caused or alleged to have been caused directly or indirectly by this document.

Printed: November 2005

Table of Contents

Chapter 1 Introduction 3

1.1 What is Endnote? ... 3
1.2 Basic concepts ... 3
1.3 Endnote at Wageningen UR ... 4

Chapter 2 Starting EndNote 5

2.1 Create a new library ... 5
2.2 Displaying the toolbars ... 7
2.3 Open an existing libray ... 7

Chapter 3 Add references to a library 7

3.1 Enter references manually ... 9
3.2 Direct export from databases ... 11
3.3 Download from WinSpirs ... 13
Create a download from WinSpirs ... 13
Import a WinSpirs download into a library ... 14
3.4 Download from WebSpirs ... 15
Create a download from WebSpirs ... 15
Import a WebSpirs download into a library ... 16
3.5 Download from PubMed ... 17
Create a download from PubMed ... 17
Import a PubMed download into a library ... 19
3.6 Retrieve references from Wageningen catalogue with a connection file ... 20
Make a connection to Wageningen Catalogue ... 20
Search Wageningen Catalogue ... 20
Retrieve references from the catalogue into an EndNote library ... 21
3.7 Retrieve references from Wageningen catalogue with a downloaded file ... 22
Create a download from the Wageningen catalogue ... 22
Import a Wageningen catalogue download ... 24

Chapter 4 Manage libraries 25

4.1 Transfer references between libraries ... 25
4.2 Search ... 25
Browse ... 25
Specific searches ... 26
4.3 Deduplicate ... 28
4.4 Print references ... 28

Chapter 5 Integration with MS-Word 29

5.1 Include references in a document ... 29

© 2005 Wageningen UR Library

5.2 Format reference lists according to another journal style 30

Index 31

© 2005 Wageningen UR Library

1 Introduction

This is a brief manual for the Windows version of EndNote. It is intended to help new users of EndNote at Wageningen UR to get started with the programme. Some basic skills in using Windows and MS Word are assumed.

In this brief manual not all possibilities of EndNote are dealt with. The original manual is well written and very detailed. It can be purchased as a printed version from the manufacturers, but is also available in PDF and should reside in the EndNote program directory. It is also available via Internet. Consult the Help function from the menu bar of EndNote for online help.

This manual is used as course material for the course Working with Endnote 8. During the course you will learn:

- How to use EndNote to store details of references
- How to add downloaded references to an EndNote library
- How to use EndNote to search in catalogues
- How to manage data in EndNote
- How to use EndNote to automatically insert references in your texts and create reference lists

1.1 What is Endnote?

EndNote is a reference database. It specializes in storing, managing, and searching for bibliographic references, figures and tables in your private reference library. EndNote is also a reference list maker. It builds lists of cited works automatically in any format or journal style within the word processing programme MS Word or WordPerfect, facilitating the compilation of bibliographic reference lists of articles, reports or books.

1.2 Basic concepts

- **library**

  In EndNote you work with libraries, also called Reference Library Files. They are the database files where your references are stored. EndNote libraries have the extension .enl. You can make as many libraries as you wish. In version 8 the size of a library is unlimited.

- **reference**

  A library consists of references. EndNote automatically assigns a unique number to each reference. You cannot change this record number. EndNote uses this number to format reference lists. It is possible to enter long abstracts and notes—up to 32K, or approximately 5 pages of text, in any field.

- **reference type**

  EndNote works with various reference types. There are reference types for journal articles, books, book chapters *etc*. This is essential because EndNote manipulates the references when formatting a bibliography or reference list according to a specific journal style. Usually a book has to be formatted in another way than a journal article, and so on.

- **field**

© 2005 Wageningen UR Library

An EndNote reference consists of fields, in which a particular piece of bibliographic information is stored, e.g. Author, Title, Year etc. This enables EndNote to manipulate the filed contents when formatting a reference according to a specific journal style, e.g. journal title in italics or volume numbers in bold. The maximum number of fields is 52 per reference.

- **filter**

  A filter is a file consisting of one or more templates that instruct EndNote how to interpret and import data into the corresponding fields in an EndNote library. For each bibliographic database a unique import filter is required, because the organisation of data differs between databases. EndNote filters have the extension .enf (EndNote filter).

- **(output) style**

  A style is the file that contains information how to arrange references for a wide variety of bibliographic formats. Styles format in-text citations, footnote citations and reference lists. They are specific for different journals, though they can also be based on more general style guides, such as the Chicago Manual of Style or the MLA Handbook. EndNote provides more than 1000 preconfigured styles. You can also create a new style. EndNote styles have the extension .ens (EndNote style).

- **format**

  The EndNote format command arranges the information of your EndNote references in such a way that the in-text citations and reference lists appear in a specific journal style when writing a document.

- **connection file**

  EndNote is able to provide access to remote online bibliographic databases or catalogues when the sources use the information retrieval protocol called Z39.50. For this process EndNote uses connection files. EndNote provides several connection files. Connection files have the extension .enz.

1.3 Endnote at Wageningen UR

Wageningen UR has a campus wide license for Endnote. The software is available at distribution costs at the I&S Print/ScanDesk in the Computechnion, groundfloor, Building 313, Dreijenplein 2, 6703 HB Wageningen.

Wageningen UR Library supports the use of EndNote by introductory courses and WUR specific manuals. For employees of Wageningen UR, the library creates EndNote support files. These additional styles, connection files and filters are not included with the programme itself. You can download these files from the URL http://library.wur.nl/endnote/ . Transfer these additional EndNote files into the folder ..\endnote\, the styles into the folder ..\endnote\styles\, filters into the folder ..\endnote\filters\ and connection files into the folder ..\endnote\connections\.
Files are added or updated on a regular base.

For former Cardbox users, Wageningen UR Library provides filters to convert Cardbox databases with the PUDOC format into an EndNote library. The conversion results in a fully searchable library. The source information, however, is not divided in separate fields, but is placed in the journal title field. This means that the references need some editing before use in your own publications. The Cardbox filters (Cardbox(WUR).enf or Cardbox(WUR)2.enf) can be found on http://library.wur.nl/endnote/.

For specific questions on the use of Endnote, please contact the library helpdesk (tel. 84440 or email helpdesk.library@wur.nl). You can also ask your information specialist for assistance.

© 2005 Wageningen UR Library

2 Starting EndNote

This depends on the way EndNote has been installed on your computer:

1. Double click the EndNote icon on the desktop area
2. Or: choose Programs from the Start menu, select EndNote 8 and then select the EndNote programme
3. Or: Use Windows Explorer and select the drive and folder where the EndNote programme has been installed and (double) click on the file EndNote.exe

2.1 Create a new library

On starting EndNote a dialog box appears (Figure 1), with **Untitled.enl** as the name of a new library. There is an option to skip this screen. It is recommended to keep using this screen.

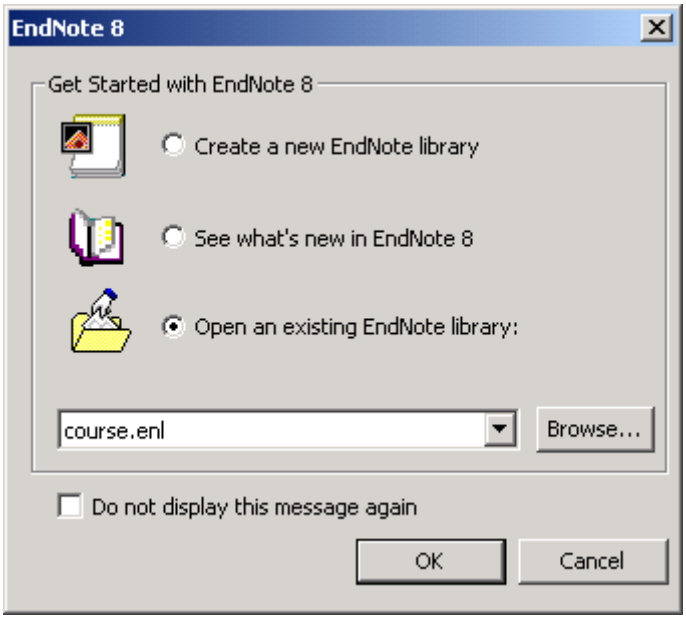


Figure 1. Intial dialogue box

Create a new library:

1. Check the **Create a new EndNote library** radio button. Figure 2 appears.

© 2005 Wageningen UR Library

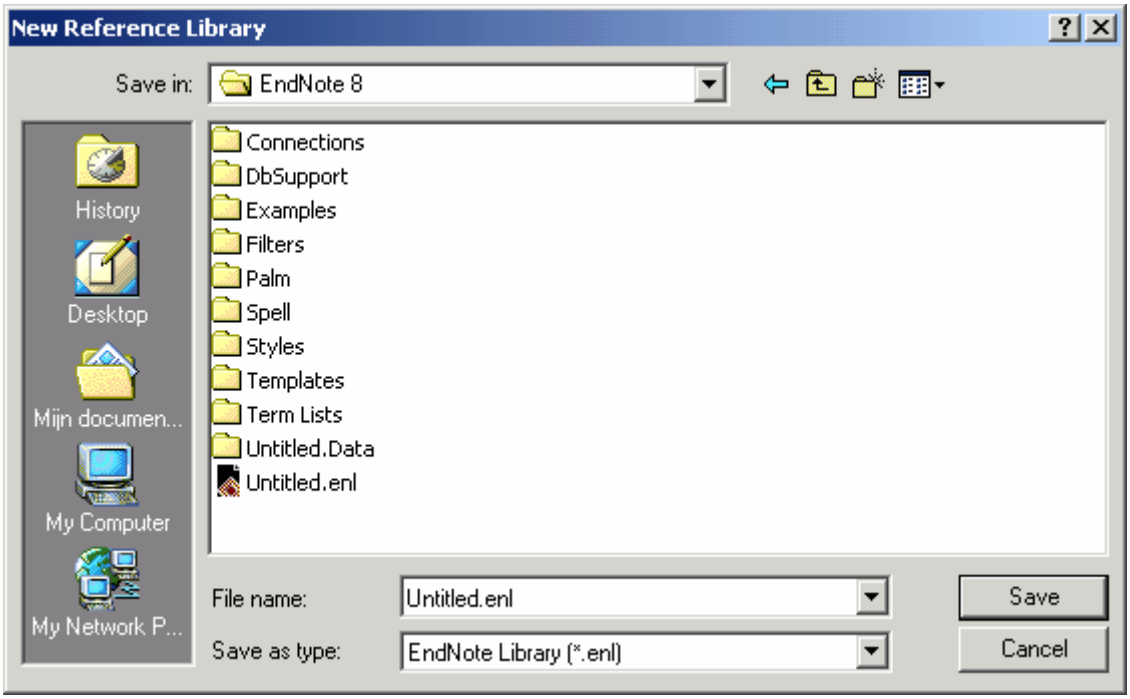


Figure 2. New library dialogue box

2. Select the drive and folder where you want to save the library from the **Save in** box
3. Enter the name of your new library in the **File name** box
4. Click the **Save** button. The new library appears as an empty EndNote library with "Showing 0 out of 0 reference" at the bottom of the window (Figure 3).

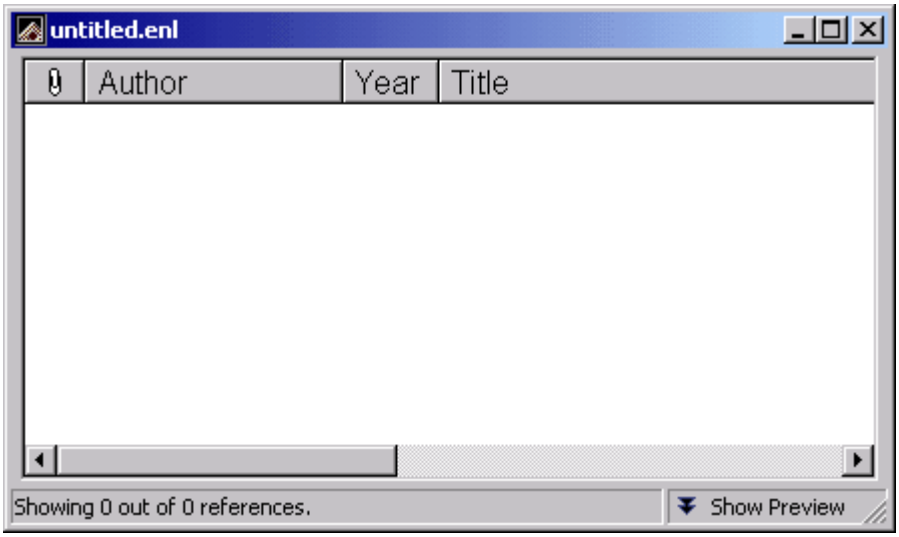


Figure 3. New library window

© 2005 Wageningen UR Library

2.2 Displaying the toolbars

The toolbars are often not shown. To make the main toolbar visible:

1. From the **Tools** menu on the menu bar, select **Show Toolbar**
2. Select **Main**. The Main toolbar appears (Figure 4)

Figure 4. Main toolbar

There is also a less frequently used Text Style toolbar. To make this toolbar visible:

1. From the **Tools** menu on the menu bar, select **Show Toolbar**
2. Select **Text Style.** The text toolbar appears (Figure 5)

Figure 5. Text Style toolbar

2.3 Open an existing libray

Once a library has been created and saved, EndNote will remember that the library exists.

To open an existing library:

1. Click the **Browse...** button in the initial dialogue box (Figure 1 5) to select the name of the library
2. Click on the **OK** button.

Alternatively, if the intial dialogue box (Figure 1 5) is not displayed:

1. From the **File** menu select **Open**. The saved library's file name should be displayed in the submenu.
2. If the library is not displayed, select **Open** from the **File** menu and then **Open Library....** Locate the library file on your computer.

3 Add references to a library

There are several ways to add references to a library:

- Enter references manually 9
- Direct export from databases 11 (Science Citation Indexes)

  Records from a range of databases can be exported directly to EndNote. This direct export option is provided by Web of Science and Current Contents Direct (both from ISI, the producer of EndNote), but also by ScienceDirect (Elsevier Journals) and Highwire Press.
- Download from WinSpirs 13

  For this option you need the filter Spirs(WUR).enf or database specific filters. These filters are not included in EndNote. Download filters developed for Wageningen UR from http://library.wur.nl/endnote/. Store downloaded filters in the folder ..\Progam Files\endnote8\filters\.
- Download from WebSpirs 15

© 2005 Wageningen UR Library

WebSpirs is the Internet version of WinSpirs. As in the previous option, you need the filter Spirs(WUR).enf or database specific filters. These filters are not included in EndNote. Download filters developed for Wageningen UR from http://library.wur.nl/endnote/. Store downloaded filters in the folder ..\Progam Files\endnote8\filters\.

- Download from PubMed 17
- Retrieve references from the Wageningen catalogue with a connection file 20

  In this option references from Wagingen catalogue are retrieved directly by using the connection file. Although you do not need to download and import your search results, search options are more limited than by using the standard Web Interface to search the catalogue. To add references from a search in Wageningen catalogue by using the connection file, you need the connection file Wageningen Catalogue(WUR).enz. This connection file is not included in EndNote. Download this connection file from http://library.wur.nl/endnote/. Store this file in the folder ..\Progam Files\endnote8\connections\.

- Retrieve references from the Wageningen catalogue with a downloaded file 22

  In this option references from Wageningen catalogue are downloaded and imported into your library. It is recommended to use this option when you prefer to use all search options provided by the standard Web Interface to search the catalogue.

Note: Wageningen Catalogue contains bibliographic information of books, reports, theses, journal titles etc. In contrast to a bibliography, a catalogue does not contain journal articles or book chapters.

© 2005 Wageningen UR Library

3.1 Enter references manually

1. Select **New Reference** from the **References** menu. A window appears with **New Reference** in the title bar. This window is called the New Reference window (Figure 6)

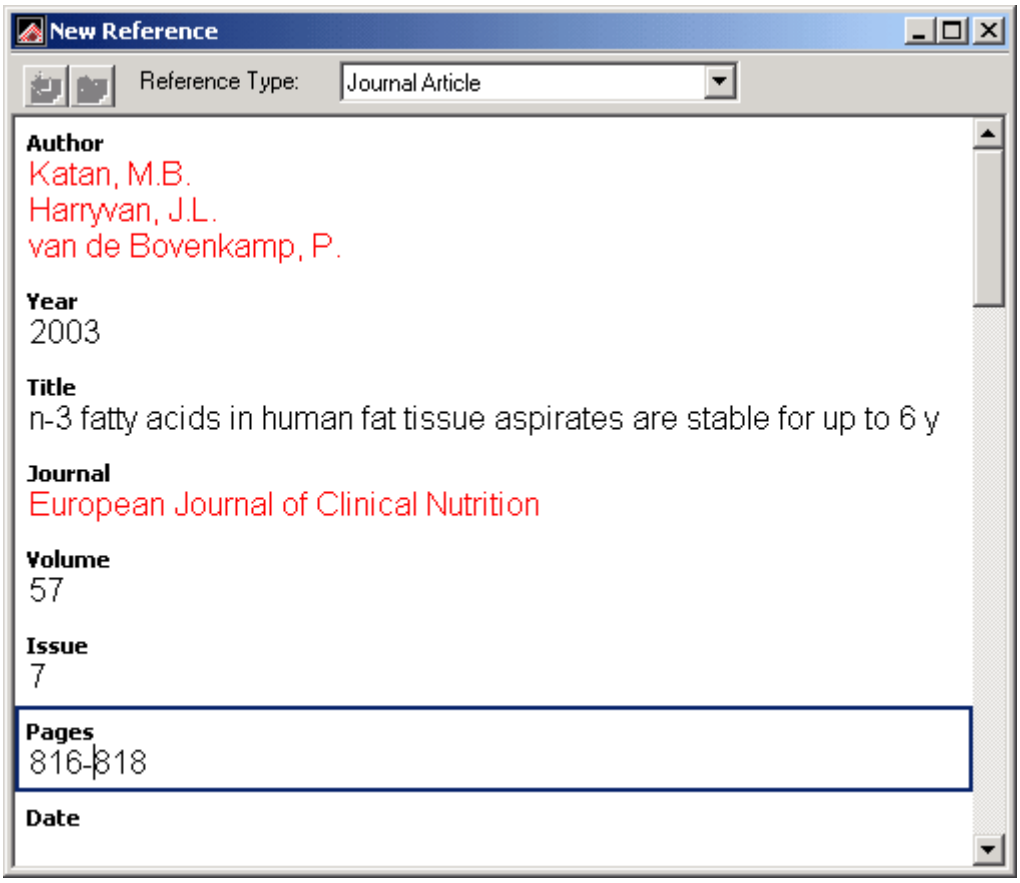


Figure 6. New Reference window

2. Select the appropriate reference type from the **Reference Type** drop down list (book, journal article, conference proceedings etc.)
3. Enter bibliographic data into the fields of the New Reference window. Use your mouse to select a field or use Tab to select the next field and Shift+Tab to select the previous field. Not all fields need to be filled. The most important fields are discussed.
   - **Author**

     There are several input options:
     - Katan, M.B.
     - Katan, Martijn B
     - M.B. Katan
     - Martijn B. Katan

     In case of multiple authors, each author should be entered on a single line. If an author has more than one initial, make sure that full stops or spaces separate the initials; otherwise EndNote will interpret the initials as a first name.
     For complex author names, it is advised to enter the last name first:
     - van der Heijden, Willem B.
     - van der Heijden, W.B.
     - de T. Alvim, Paulo

© 2005 Wageningen UR Library

- de T. Alvim, P.

Enter corporate names with a comma at the end:

- Food and Agricultural Organization,
- World Bank,

- **Year**

  Complete the year with 4 digits: 1989

- **Title**

  Font types and punctuation of the original title are generated automatically by EndNote when formatting the references. Exceptions are the use of capitals (e.g. DNA) and letters in italics (e.g. names of species).

- **Journal**

  Fill in the complete journal title: European Journal of Clinical Nutrition

- **Alternate journal**

  Used for the abbreviated journal title. In this example: Eur. J. Clin. Nutr.

- **Volume**

  Fill in the volume number: 57

- **Issue**

  Fill in the issue number: 7

- **Pages**

  Do not use commas. Separate page numbers by a hyphen: 816-818

- **Label**

  Optional. Used for reprint numbers.

- **Keywords**

  Optional. Used to improve retrieval of relevant articles.

- **Abstract**

  Optional. Used to provide a short summary

- **Notes**

  Optional. Used to make notes about the article

- **URL**

  Optional. If you complete this field with a relevant link (to the online-version) of the journal (article), the journal can be started from within EndNote. The journal opens in your Internet browser by clicking the link, or <Ctrl+g>.

- **Link to pdf**

  Optional. Used to link to a file on disk.

Once you have completed the New Reference window, the reference will be automatically saved on

© 2005 Wageningen UR Library

closing the window. Close the window by clicking the cross at the top right hand of your window. The Library window is shown, with references sorted by first author name, publication year or title (Figure 9 14). You can easily change the sequence by clicking on the grey field heading bars.

3.2 Direct export from databases

Direct export from Web of Science (Science Citation Indexes):

1. Start your browser and go to the shortcuts section of the Desktop Library (http://library.wur.nl/desktop/direct/index.html)
2. Select Web of Science.
3. Perform a search in Web of Science by selecting **General search** in the Science Citation Index Expanded.
4. Select individual records using the check boxes or check the **All records on page** radio button or indicate a range of records. Then select **Full record**. (Figure 7)
5. Click on the **Export** button. A screen appears confirming the exchange of data from Web of Science to your local computer. Data are stored in a temporary file. After the exchange of data has been completed, choose destination **Endnote** and EndNote automatically starts.
6. Select the name of the library in which you want to store the references. The records will be transferred to your library (a counter keeps track of the number of records processed).

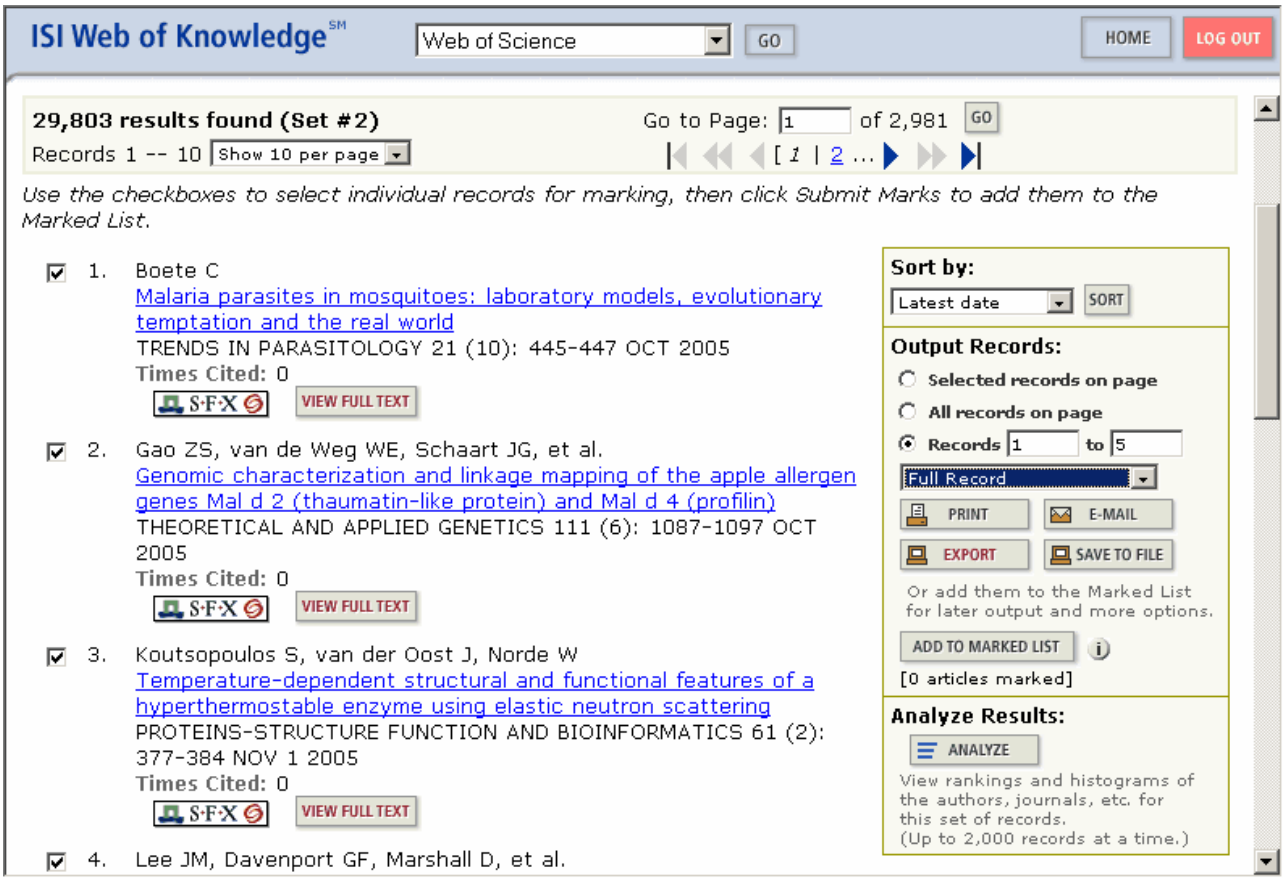


Figure 7. Search results-summary window from Web of Science

7. For more output options, **Add** the selected records **to Marked List.** Then select the **Marked List** button on the toolbar to go to the Marked List page. The **Marked List** button appears only after you have marked records. On the Marked List page, check boxes for Author, Title and Source are selected by default (Figure 8).
8. Select additional fields to export by checking other boxes, e.g. keywords and abstract
9. Click on the **Export to Reference Software** button. A screen appears confirming the exchange of data from Web of Science to your local computer. Data are stored in a temporary file. After the exchange of data has been completed, choose destination **Endnote** and EndNote automatically starts.
10. Select the name of the library in which you want to store the references. The records will be transferred to your library (a counter keeps track of the number of records processed).
11. After the programme has finished uploading, a filled library is shown. Only the imported references are shown in the window. This window is called the Library window (Figure 9 14). By default, the library window displays the first author's last name, the year and the title of each reference. You can browse through the reference library by using the scroll bar, the scroll arrows, Page down, Page up, Home, End and Arrow keys.
13. Click the **Show Preview** button at the bottom of the Library window. Now the selected reference appears in the preview window
14. Double click on a reference to edit the reference

Note: In a similar way references from Scopus, Elsevier journals (ScienceDirect), HighWire Press *etc.* can be exported directly into EndNote.

© 2005 Wageningen UR Library

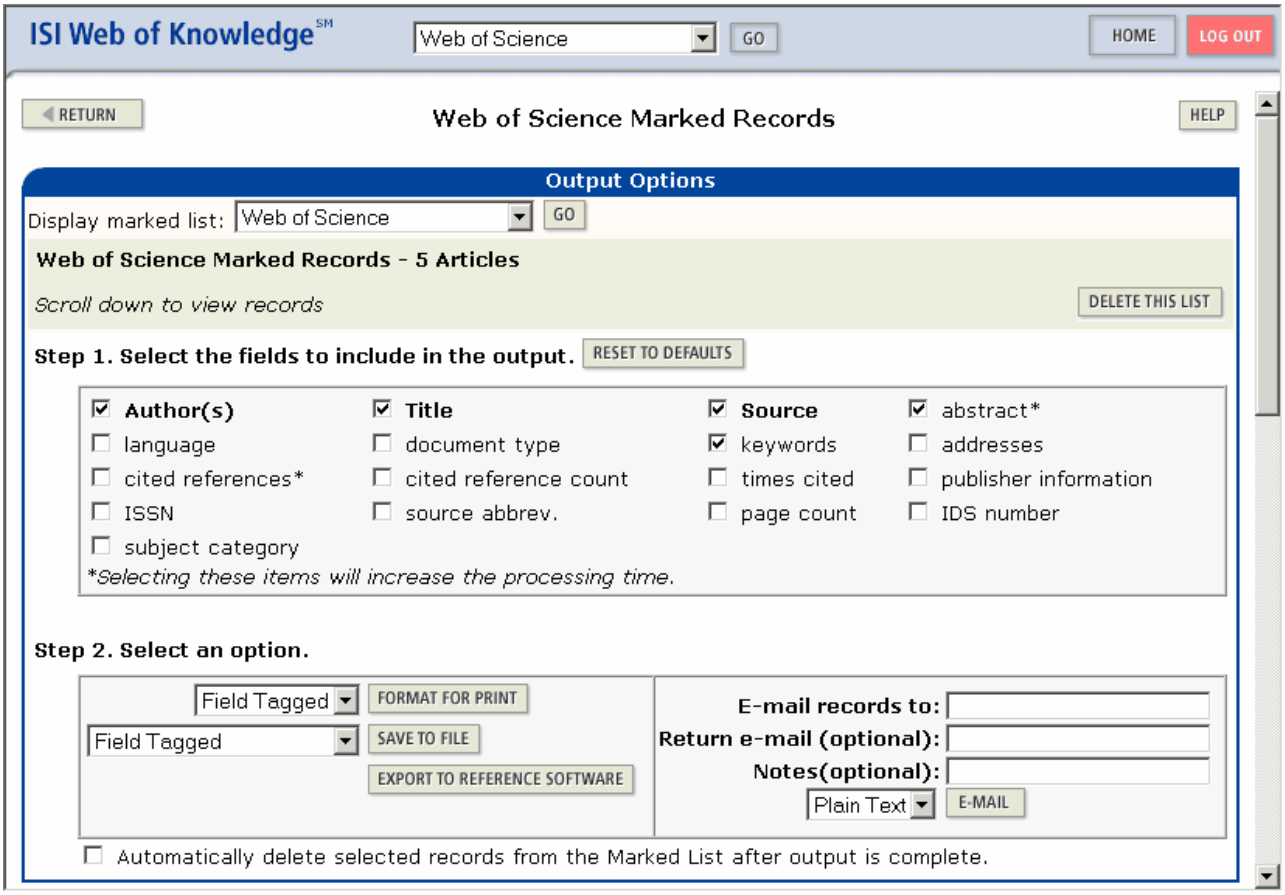


Figure 8. View marked records window from Web of Science with the abstract and keywords marked as additional download fields.

3.3 Download from WinSpirs

Download from bibliographies on the ERL-server using WinSpirs:

- Create a download from WinSpirs 13
- Import a WinSpirs download into a library 14

3.3.1 Create a download from WinSpirs

1. Perform a search in WinSpirs.
2. Click the **All fields** button at the bottom of the window.
3. Click the **Download** button at the top of the window. A new window Download Records appears.
4. Enter a name for the download file in **File Name.**
5. Select the required disk drive in **Drives**.
6. Select the required folder or directory in **Directories**.
7. In **Download Range** indicate which records you wish to download.

© 2005 Wageningen UR Library

8. Indicate in **Download Fields** the option **As Shown**
9. Click the **Save** button.

You have now created a download file which contains all selected references.

3.3.2 Import a WinSpirs download into a library

1. Start EndNote. Create a new library 5 or open 7 an existing one.
2. Select **Import...** from the **File** menu. A pop up window appears.
3. Click the **Choose file** button. Complete the window with the drive, directory and file name of the downloaded file.
4. Select other files from the **Import Option** drop down menu. A list of import filters appears.
5. Select **Spirs(WUR).enf** (or **Econlit(WUR).enf** when the search was performed in Econlit *etc*).
6. Click on the **Choose** button. When these filters do not appear, look at the beginning of this chapter for instructions on downloading these filters.
7. Click on the **Import** button. The conversion programme of EndNote starts. After the programme has finished the conversion you will see a filled library. Only the imported references are shown in the window. This window is called the Library window (Figure 9). By default, the Library window displays the first author's last name, the year and the title of each reference. You can browse through the reference library by using the scroll bar, the scroll arrows, or the Page down, Page up, Home, End and Arrow keys.
   Note: If the import filter does not function properly ask your information specialist for assistance.
8. Click on the **Show Preview** button at the bottom of the Library window. Now the selected reference appears in the preview pane.
9. Double click on a reference to edit the reference.

© 2005 Wageningen UR Library

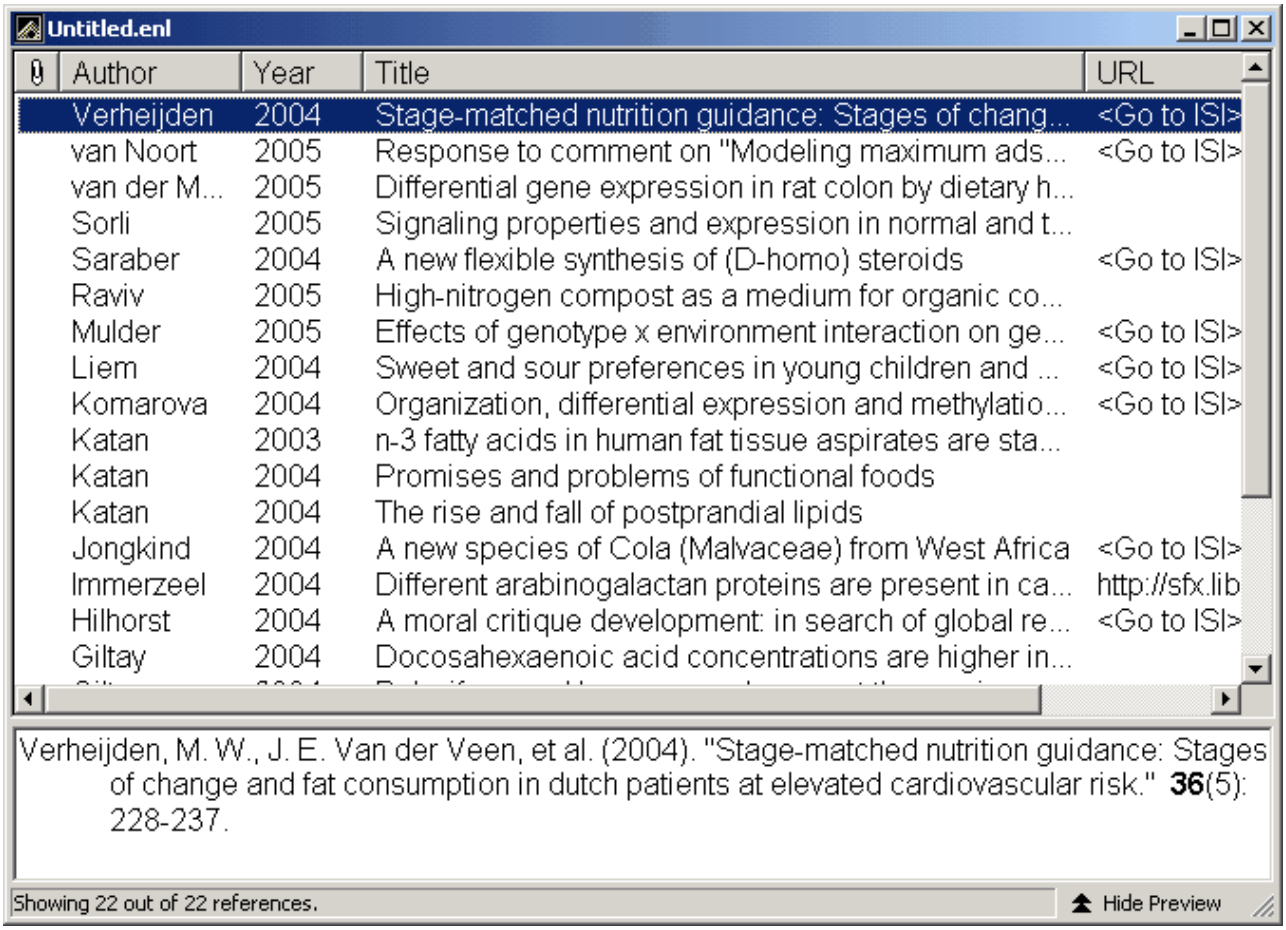


Figure 9. Library window.

3.4 Download from WebSpirs

Download from bibliographies on the ERL-server using WebSpirs 5.0.x

- Create a download from WebSpirs 15
- Import a WebSpirs download into a library 16

3.4.1 Create a download from WebSpirs

1. Start your browser (either IE or Firefox).
2. Go to the shortcuts page of Wageningen Desktop Library
3. Click in the right frame on the name of a specific bibliography, e.g. Biological Abstracts or CAB Abstracts. Or select in the left frame **ERL WebSpirs** to search multiple databases in a single search.
4. Perform your search
5. Start the download procedure by clicking on the **Save** button. A new window appears.
6. Complete the window as indicated in Figure 10. Select **All records** (or **Marked records** when desired), **Complete Record** and **Short labels**. Do not check boxes for **Record Number and**

© 2005 Wageningen UR Library

database name, and **Word wrapping**

7. Click on the **Save** button.

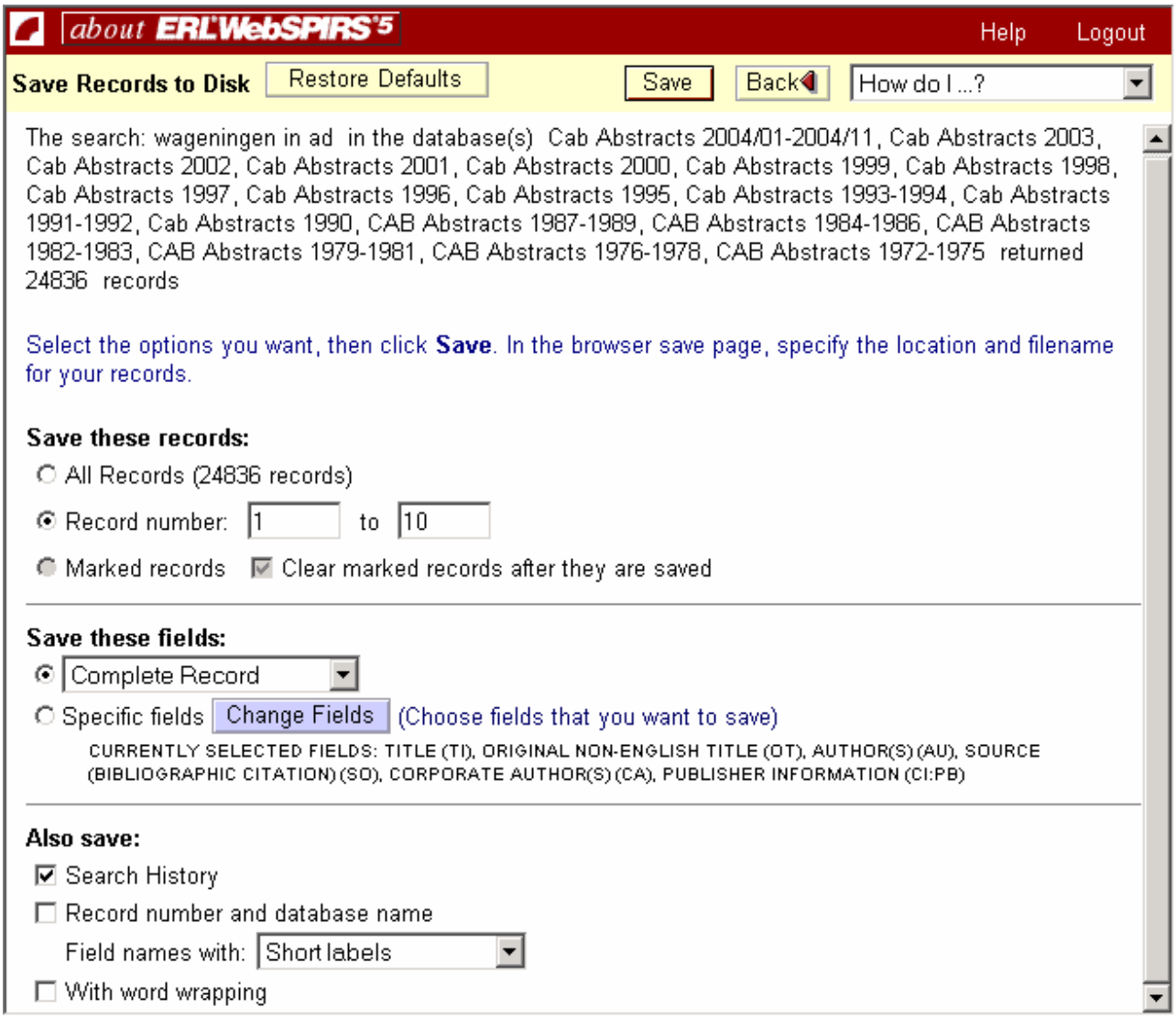


Figure 10. Completed download screen from WebSPIRS

3.4.2 Import a WebSpirs download into a library

1. Start EndNote. Create a new library 5 or open 7 an existing one.
2. Select **Import...** from the **File** menu. A pop up window appears.
3. Click on the **Choose file** button. Complete the window with the drive, directory and file name of the downloaded file.
4. Select **Other filters...** from the **Import Option** drop down menu. A list of import filters appears.
5. Select **Spirs(WUR).enf** (or **Econlit(WUR).enf** when the search was performed in Econlit *etc*).
6. Click on the **Choose** button. When these filters do not appear, look at the beginning of this chapter for instructions to download these filters.

© 2005 Wageningen UR Library

7. Click on the **Import** button. The conversion programme of EndNote starts. After the programme has finished the conversion, you will see a filled library. Only the imported references are shown in the window. This window is called the Library window (Figure 9 14). By default, the library window displays the first author's last name, the year and the title of each reference. You can browse through the reference library by using the scroll bar, the scroll arrows, or the Page down, Page up, Home, End and Arrow keys.
   Note: If the import filter does not function properly ask your information specialist for assistance.
8. Click on the **Show Preview** button at the bottom of the Library window. Now the selected reference appears in the preview pane.
9. Double click on a reference to edit the reference.

3.5 Download from PubMed

Add references to your library with a download from PubMed:

- Create a download from PubMed 17
- Import a PubMed download into a library 19

3.5.1 Create a download from PubMed

1. Start your browser.
2. Go to the shortcuts page of Wageningen Desktop Library
3. Select **PubMed** in the right-hand frame
4. Perform your search.
5. Check references on the search results page and select **MEDLINE** from the **Display** drop-down menu (Figure 11).
6. Choose **File** from the **Send to** drop-down menu, and click on **Send to**.

© 2005 Wageningen UR Library

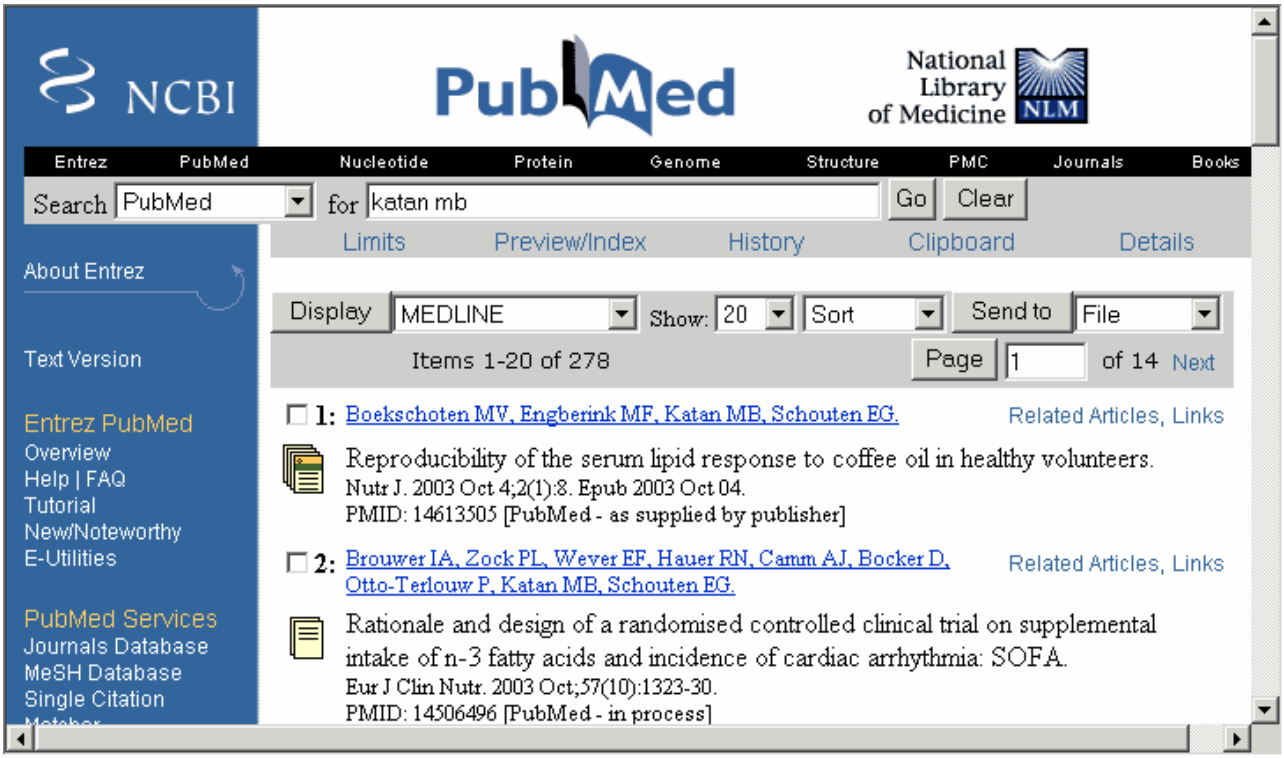


Figure 11. Search results page

7. Select **Save** in the next screen (Figure 12).

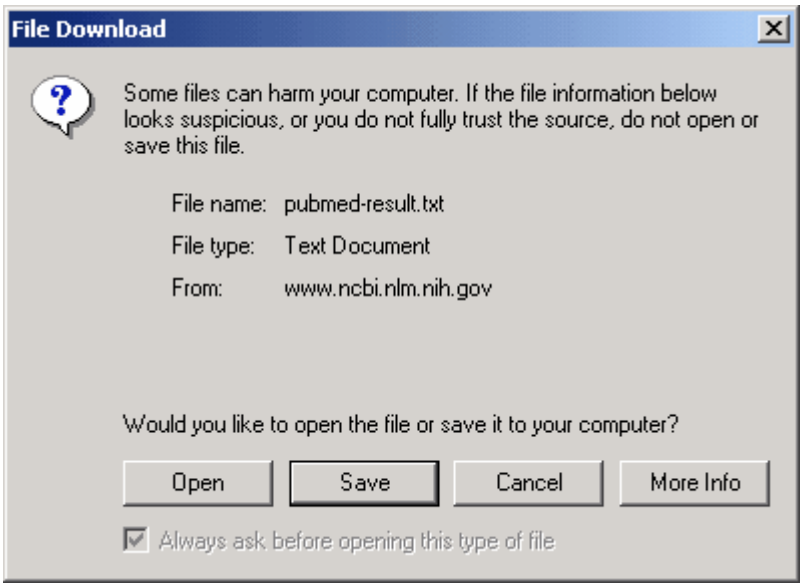


Figure 12. File download screen

8. Select the disk and directory in the **Save in** box
9. Save the records as a *.txt type by selecting All Files in **Save as type** box and typing the file name with a .txt extension in the **File name** box (Figure 13)

© 2005 Wageningen UR Library

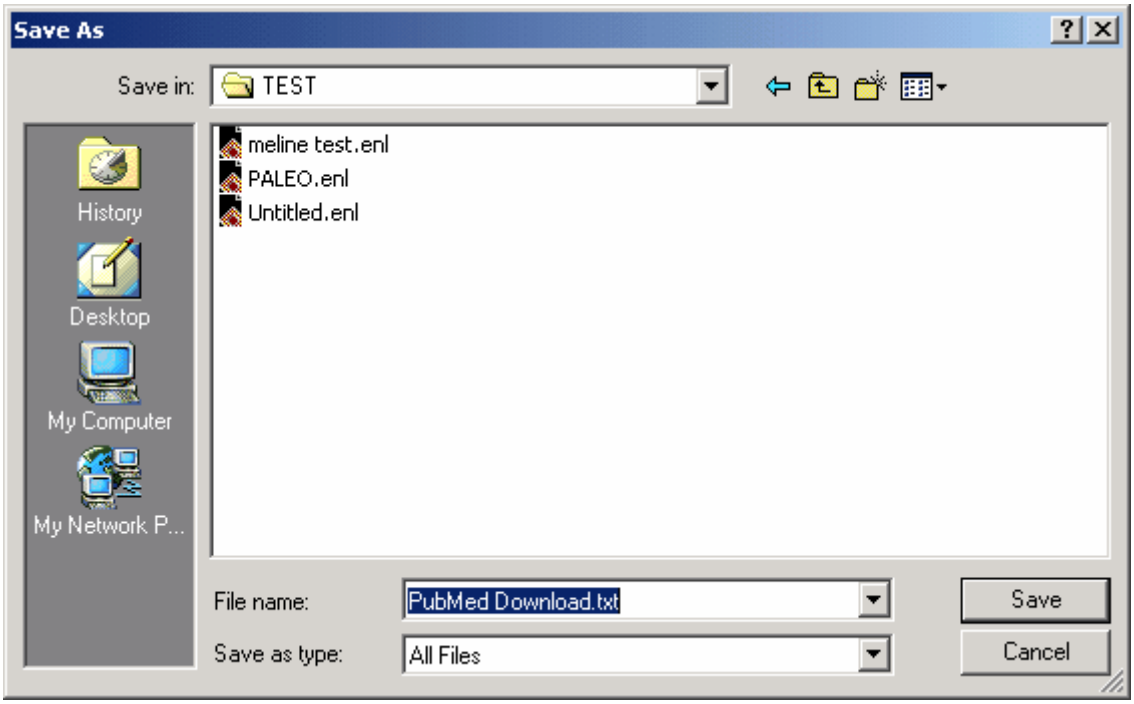


Figure 13. Save as window

3.5.2 Import a PubMed download into a library

1. Start EndNote. Create a new library 5 or open 7 an existing one.
2. Select **Import...** from the **File** menu. A pop up window appears.
3. Click on the **Choose file** button. Complete the window with the drive, directory and file name of the downloaded file.
4. Select other files from the **Import Option** drop down menu. A list of import filters appears.
5. Select **PubMed(WUR)**.
6. Click the **Choose** button. When these filters do not appear, look at the beginning of this chapter for instructions to download these filters.
7. Click on the **Import** button. The conversion programme of EndNote starts. After the programme has finished the conversion you will see a filled library. Only the imported references are shown in the window. This window is called the Library window (Figure 9 14). By default, the library window displays the first author's last name, the year and the title of each reference. You can browse through the reference library by using the scroll bar, the scroll arrows, or the Page down, Page up, Home, End and Arrow keys.
   Note: If the import filter does not function properly ask your information specialist for assistance.
8. Click on the **Show Preview** button at the bottom of the Library window. Now the selected reference appears in the preview pane.
9. Double click on a reference to edit the reference.

© 2005 Wageningen UR Library

3.6 Retrieve references from Wageningen catalogue with a connection file

Retrieving references from Wageningen catalogue by using a connection file:

- Make a connection to Wageningen Catalogue 20
- Search Wageningen Catalogue 20
- Retrieve references from the catalogue into an EndNote library 21

3.6.1 Make a connection to Wageningen Catalogue

1. Start EndNote. Create a new library 5 or open an existing one.
2. Select **Connect** from the **Tools** menu. A small pop-up window appears with Choose A Connection File in the title bar.
3. Select **Wageningen catalogue (WUR).**
4. Click on the **Connect** button.Two new windows appear (Figure 14).

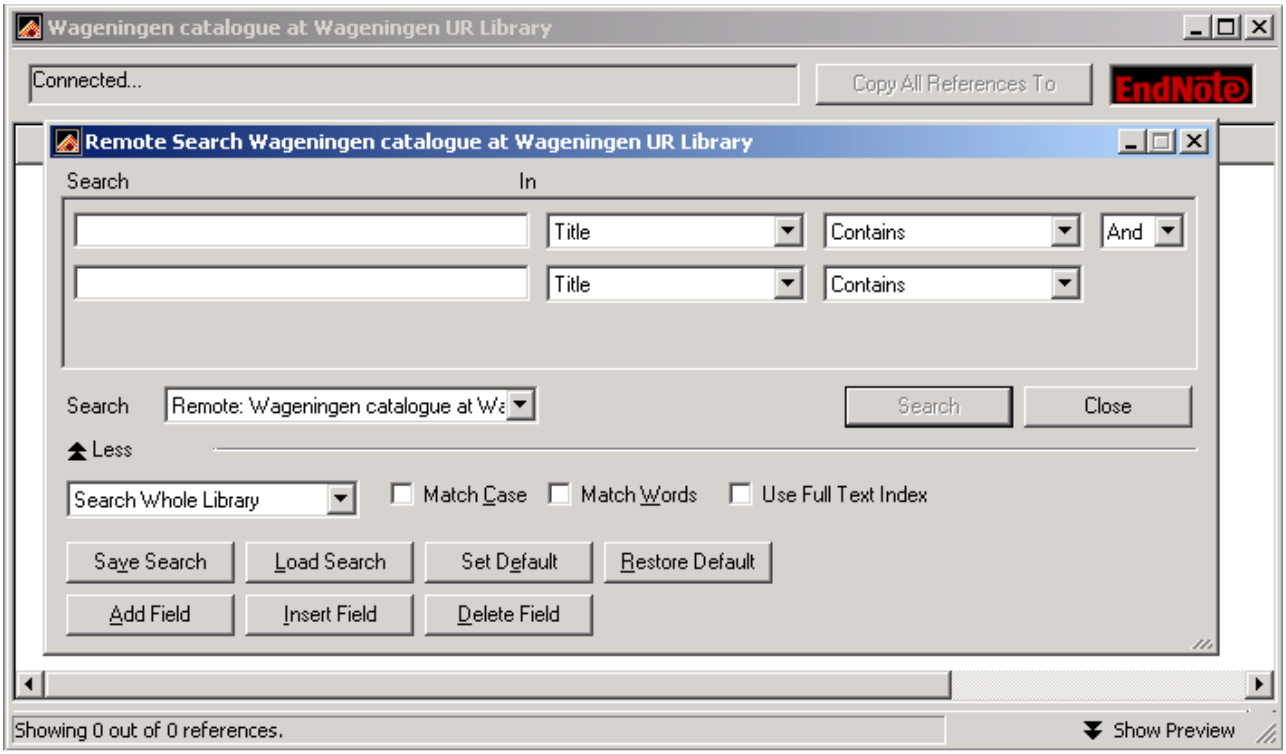


Figure 14. Connection windows that open on selecting a connection file

3.6.2 Search Wageningen Catalogue

Searches in the catalogue using EndNote are always performed on the root of the search term, i.e. a search for the word "bioinformatic" results in references with "bioinformatica" and with "bioinformatics". There are drawbacks: a search for the author "Altschul" results in references with Altschul, but also with Altschuld. Search for authors using family names. Initials are ignored.

1. Enter your search terms in the window with Remote Search Wageningen catalogue at Wageningen

© 2005 Wageningen UR Library

UR Library in the title bar (Figure 15)

2. Select **Author** from the drop-down menu next to **Title** and search for an author, e.g. Katan
3. Click on the **Search** button. A pop-up window with Confirm Remote Search in the title bar appears (Figure 16).
4. Click on the **OK** button

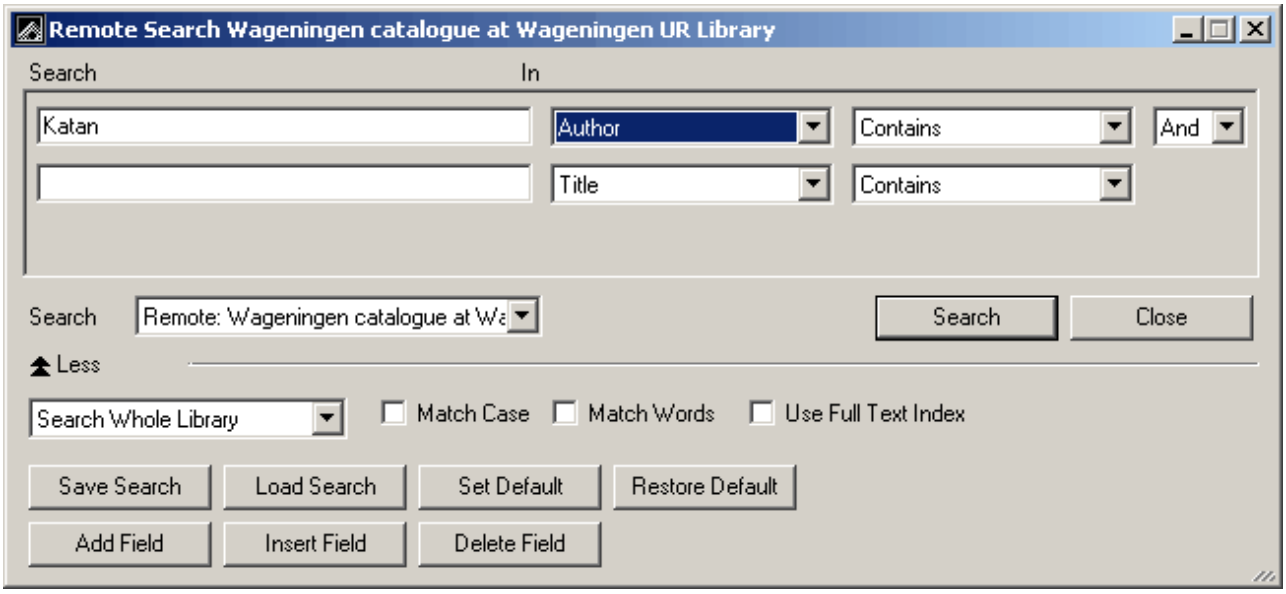


Figure 15. Search window for a remote search

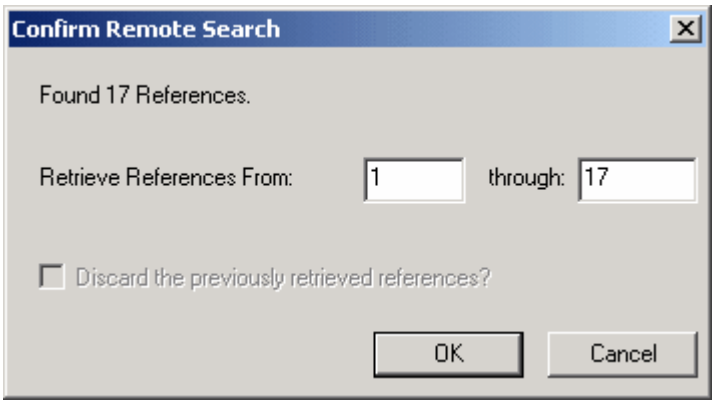


Figure 16. Confirm remote search window

3.6.3 Retrieve references from the catalogue into an EndNote library

1. After clicking on the **OK** button the window with 'Wageningen catalogue at Wageningen UR Library' in the title bar will be filled with references (Figure 17). The name of the first author, year of publication and the title of the references are displayed in this window. Copy all references to a reference library opened before by clicking the **Copy All References To** button. Copy a selection by clicking selected references. Select more references by holding down the 'Control' key and clicking the references.
2. Select the name of the library. The references show up in the library opened at the start of the session. You can continue searching the catalogue and retrieving references into Endnote, as long as all three windows are open.

© 2005 Wageningen UR Library

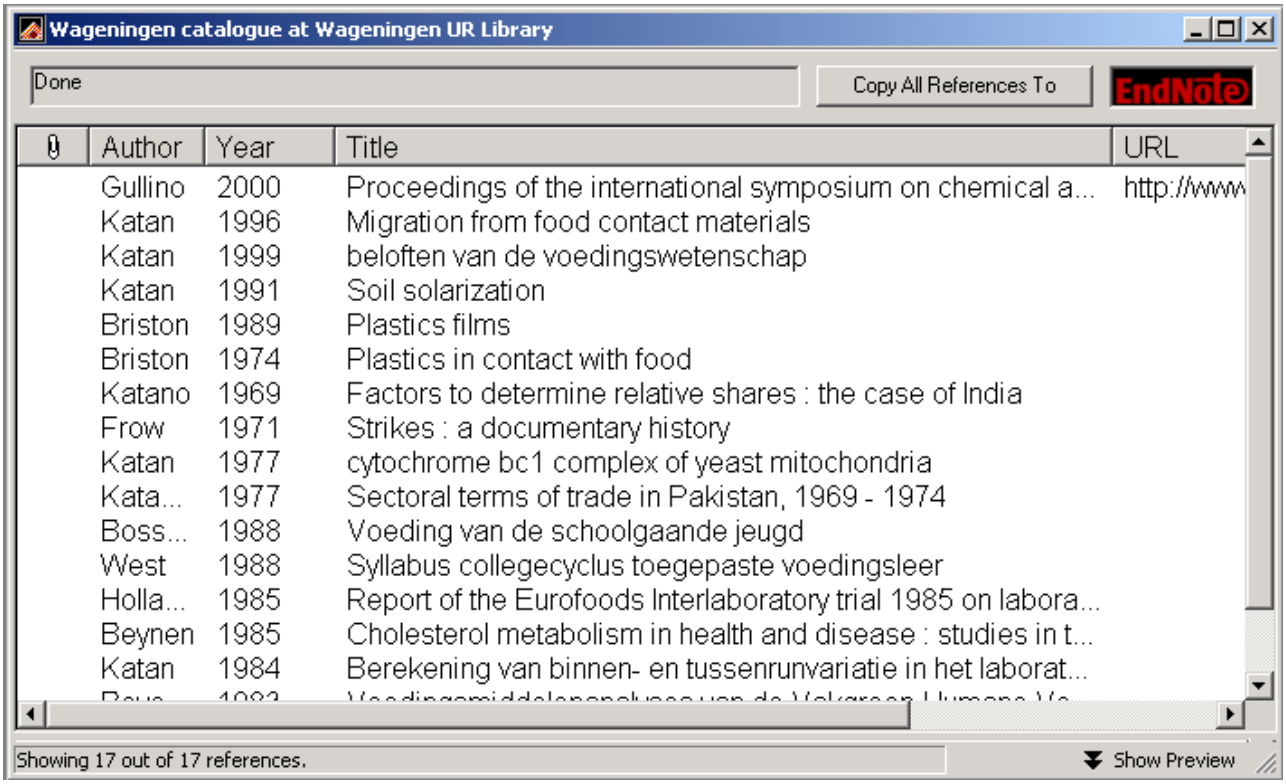


Figure 17. Connection window

3. After you have finished searching the Wageningen catalogue and retrieved the references into your EndNote library, close the extra windows (one with the title bar Wageningen catalogue... and the other with the title bar Remote search ...) by clicking the cross in the upper right-hand corner.

3.7 Retrieve references from Wageningen catalogue with a downloaded file

Retrieve references from Wageningen catalogue by downloading your search results and importing your download:

- Create a download from the Wageningen catalogue 22
- Import a Wageningen catalogue download 24

3.7.1 Create a download from the Wageningen catalogue

1. Search the Wageningen catalogue by using the standard search or the boolean search.
2. Check titles from the results list and click on the **print/save** button print/save.
3. A new window opens (Figure 18). Check the **RIS format** radio button.
4. Select the approriate **Maximum records/page** (15 is the current maximum).
5. Click on the **Display records** button. A new window opens where the tagged file is shown.
6. Wait till all records have been retrieved.

© 2005 Wageningen UR Library

7. Select **Save as...** from the **File** menu.
8. Provide the disk, directory and file name. Select **Text File (*.txt)** in the **Save as type** box.
9. Click on **Save**

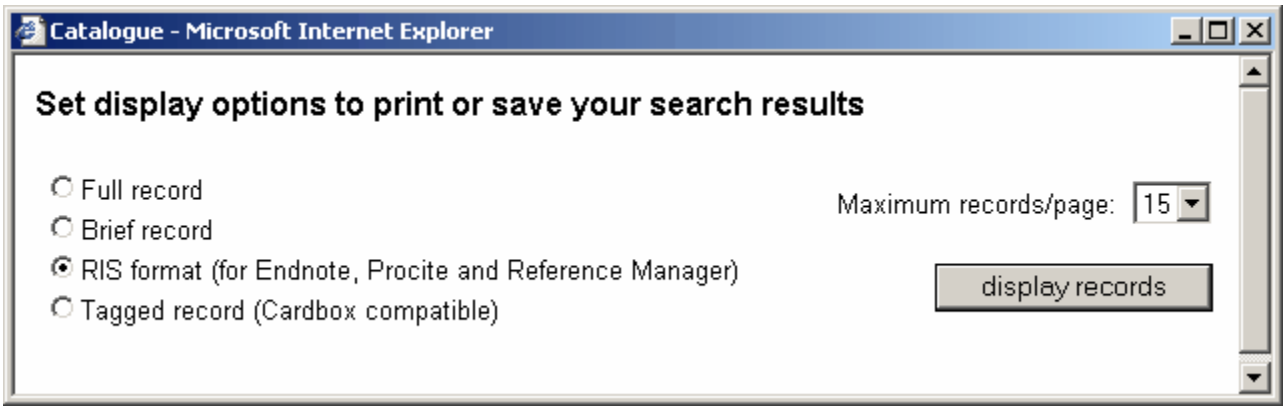


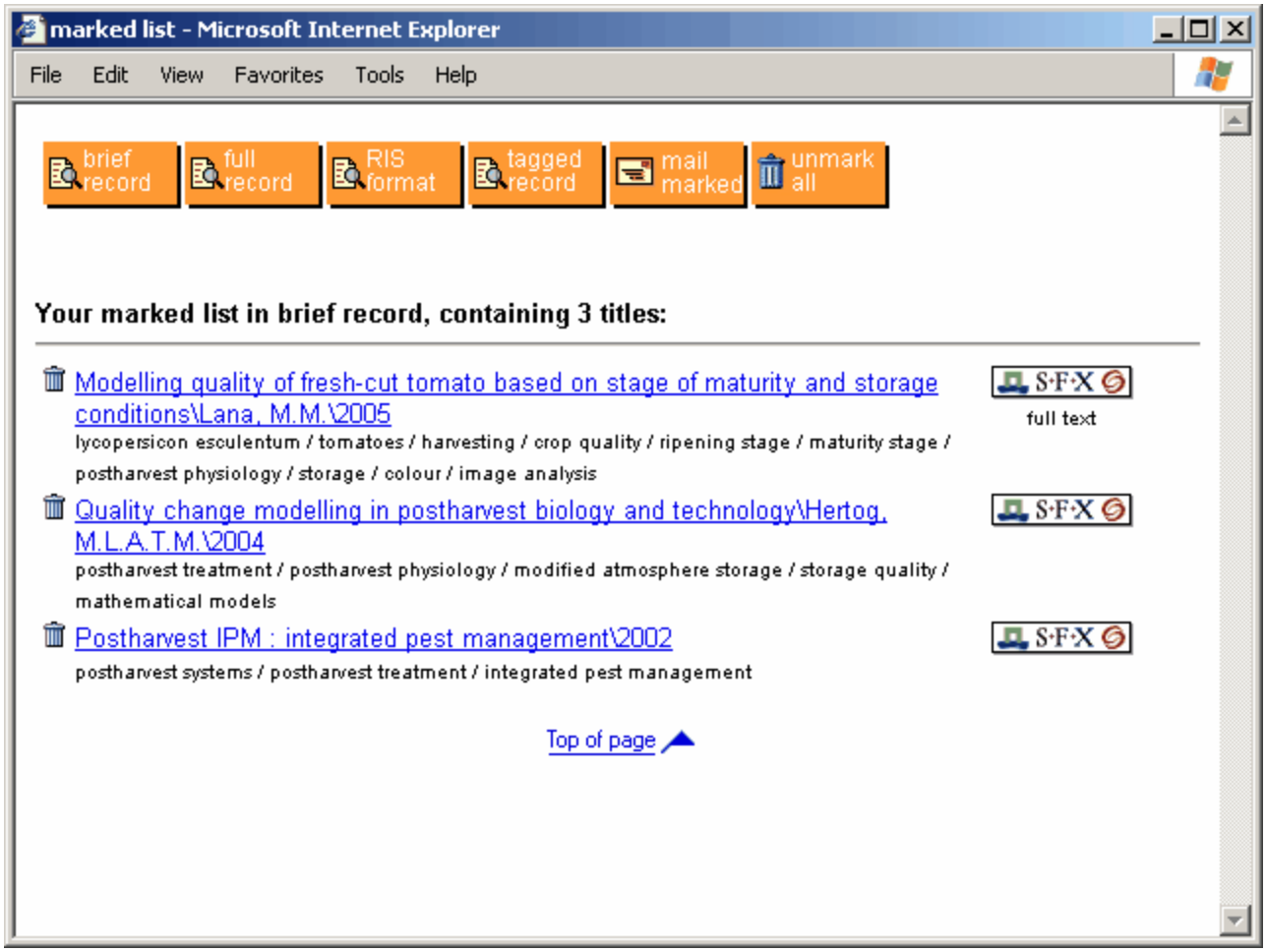
Figure 18. Saving records window from Wageningen catalogue

Another option is:

1. Search the Wageningen catalogue by using the standard search or the boolean search.
2. Check titles from the results list and click on the **marked list** button

.
3. A new window opens (Figure 19). Click on the **RIS format** radio button. A new window opens where the tagged file is shown.
4. Select **Save as...** from the **File** menu.
5. Provide the disk, directory and file name. Select **Text File (*.txt)** in the **Save as type** box.
6. Click on **Save**

© 2005 Wageningen UR Library



3.7.2 Import a Wageningen catalogue download

1. Start EndNote. Create a new library 5 or open 7 an existing one.
5. Select **Import...** from the **File** menu. A pop up window appears.
6. Click on the **Choose file** button. Complete the window with the drive, directory and file name of the downloaded file.
7. Select **Reference Manager (RIS)** in the **Import Option** drop down menu.
8. Click on the **Import** button. The conversion programme of EndNote starts. After the programme has finished the conversion you will see a filled library. Only the imported references are shown in the window. This window is called the Library window (Figure 9 14). By default, the library window displays the first author's last name, the year and the title of each reference. You can browse through the reference library by using the scroll bar, the scroll arrows, or the Page down, Page up, Home, End and Arrow keys.
9. Click on the **Show Preview** button at the bottom of the Library window. Now the selected reference appears in the preview pane.
10. Double click on a reference to edit the reference.

© 2005 Wageningen UR Library

4 Manage libraries

Managing libraries:

- Transfer references between libraries 25
- Deduplicate 28
- Search 25:
  - Browse 25
  - Specific searches 26

4.1 Transfer references between libraries

Transfer references from one library to another by using the **Copy** and **Paste** commands from the **Edit** menu:

1. Open both libraries and select **Tile** from the **Window** menu to view both libraries
2. Select the references you want to copy. Use **Select All** (Ctrl+A) from the **Edit** menu to copy the complete library
3. Select **Copy** (Ctrl+C) from the **Edit** menu
4. Select the destination library where you want to add the references by clicking on the library window
5. Select **Paste** (Ctrl+V) from the **Edit** menu

4.2 Search

In an open library you can search specific references:

- Browse 25
- Specific searches 26

4.2.1 Browse

1. Browse the library by using the scroll bar at the right-hand side of the window. Or by using the navigation keys on the keyboard: Page up, Page down, Home, End, and arrow keys.
2. Change the sequence of the references by clicking on the grey field heading bars. Click a second time to put the order upside down. For more sort options, select **Sort references** from the **References** menu.
3. Select authors by typing the first letter of the author's last name. This is only possible when the authors are sorted aphabetically.

To change the fields displayed in the library window (by default, first author, year of publication and title):

1. Select **Preferences...** from the **Edit** menu
2. Select **Display Fields**
3. Select the fields you want to display in the library window (up to five fields)

© 2005 Wageningen UR Library

4.2.2 Specific searches

EndNote provides powerful and flexible Search commands to locate specific references or groups of references. In this manual only basic principles are discussed. Detailed information on specific searches can be found in the EndNote manual (Chapter 8). In this topic the library included with EndNote …\Program Files\endnote8\examples\paleo.enl will be used.

To perform searches:

1. Open the library ....\Program Files\endnote8\examples\paleo.enl
2. Select **Search References...** (Ctrl+F) from the **References** menu. The Search window appears (Figure 20).
3. Enter search terms in the Search boxes. A search term can be restricted to a single field, e.g. searching for Billoski in the author field.
4. Click on **Any Field** and select **Author**. Enter Billoski in the Author field
5. Click the **Perform Search** button. Only references which conform to the search criteria will be shown in the next library window.
6. Select **Show All** (Ctrl+M) from the **References** menu to return to the full set of references

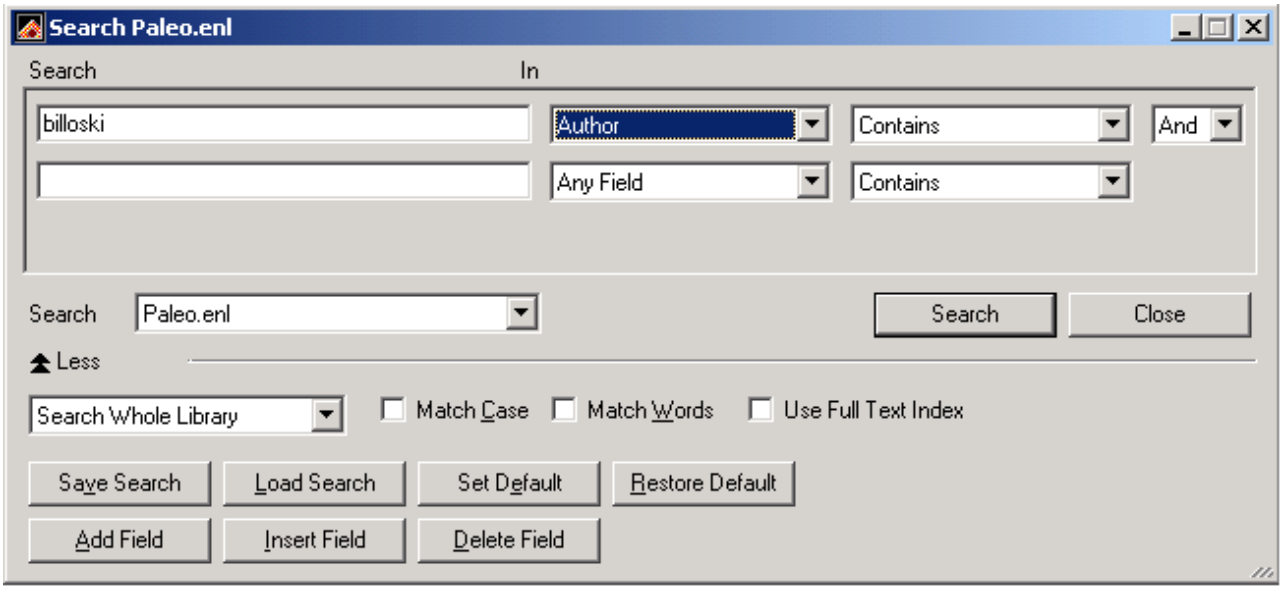


Figure 20. Search window with billoski in the author field

7. Search for journal articles: Select **Reference Type** from the drop down menu, enter Journal Article into the Search box and click on the **Search** button. 154 Journal articles are included in the library \Program Files\endnote8\examples\paleo.enl.
8. Search for non-journal articles (i.e. books, book chapters, theses etc.): Select **Reference Type** from the drop down menu, enter Journal Article in the Search box, select **Omit from showing references** from the drop down menu of the search set list and click on the **Search** button (Figure 21)

© 2005 Wageningen UR Library

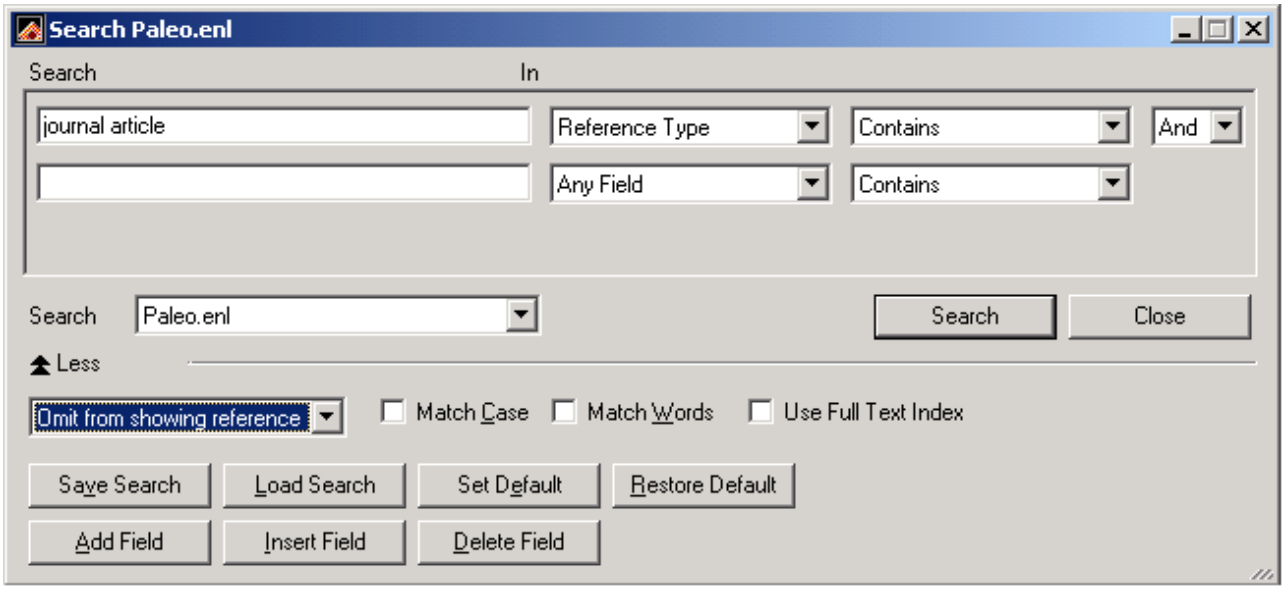
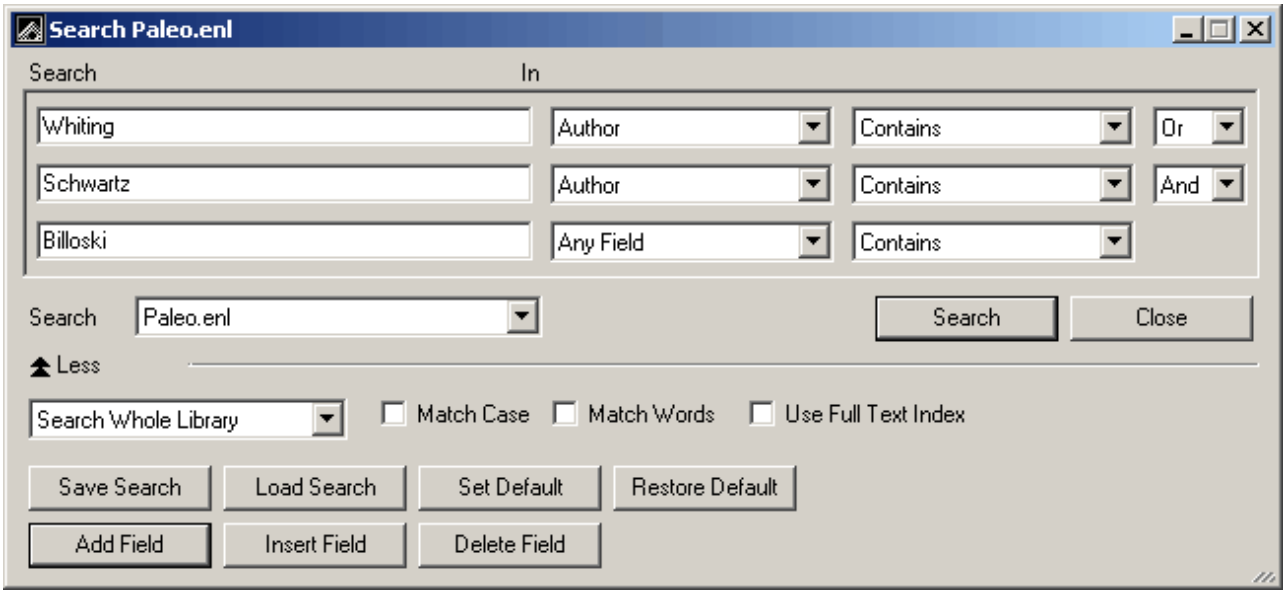


Figure 21. Search window with Omit from showing references selected

9. Combine search terms by Boolean operators And, Or and Not. Select these operators by checking the radio buttons between the search boxes. By default the Or operator is selected.
10. Add, insert or delete additional search terms by clicking the button **Add Field**, **Insert Field** or **Delete Field**. By default two search boxes are shown (Figure 20).
11. Increase the number of search boxes by clicking the **Add Field** button (Figure 22)
12. Search terms in combination searches are performed from the top to the bottom of the Search window. EndNote searches by combining the results of the first two terms with the third search term. This means that a search for references from the authors Billoski and Whiting or from the authors Billoski and Schwartz should look like Figure 22.



.

Figure 22. Search window with one search field added

© 2005 Wageningen UR Library

4.3 Deduplicate

If you collect references from various sources, you may have duplicate references in your libraries. You can remove these duplicates from the EndNote library:

1. Adjust the fields for judging duplicates in the preferences of EndNote by selecting **Preferences...** from the **Edit** menu. A pop-up window appears with in the title bar 'EndNote Preferences'
2. Select **Duplicates** from the left menu. A box appears entitled 'Compare references based on the following fields:'
3. Override some of the Endnote default settings. It is recommended to dedupulicate by Author, Year, Title, Volume and Reference Type. Make sure these boxes are checked.
4. Click on the **OK** button.
5. Click on **References** in the menu bar and subsequently on **Find Duplicates**. A new window appears, showing duplicates in blue. According to the deduplication criteria these references are duplicates. It is recommended to check duplicates before deleting.
6. Click on **References** in the menu bar and select **Delete References...** (Ctrl+O)
7. To return to the complete library, select **Show All References** (Ctrl+M) from the **References** menu

4.4 Print references

1. Open the library (Ctrl+O). Make sure that the references you want to print are shown in the Library window.
2. To print the complete library: Select **Show All References** (Ctrl+H) from the **References** menu to check whether all references are shown. To print a selection: Make a selection and select **Show Selected References** from the **References** menu. References are printed in the order in which they are listed in the Library window.
3. Select **Sort References** from the **References** menu to sort the library
4. To see the submenu with output styles, select **Output Styles** from the **Edit** menu. A submenu appears with one or more output styles, e.g. Science
5. If the style required is not listed in the submenu, select **Open Style Manager...** from the **Output Styles** submenu. The EndNote Styles window appears (Figure 23)
6. Select an Output Style (journal style) by checking the box to the left of the style. Several styles not provided by Endnote can be downloaded from http://library.wur.nl/endnote/. It is recommended to place these files in the directory ..\endnote\styles\ If the required style is missing ask your information specialist for assistance.
7. Close the EndNote Styles window
8. Select again **Output Styles** from the **File** menu. The selected style appears in the list of styles.
9. Select the Output Style you want to use.
10. Select **Print** from the **File** menu (Ctrl+P) to print the references according to the selected style. A window for the confirmation of the print command appears.
11. Click on the **OK** button.

© 2005 Wageningen UR Library

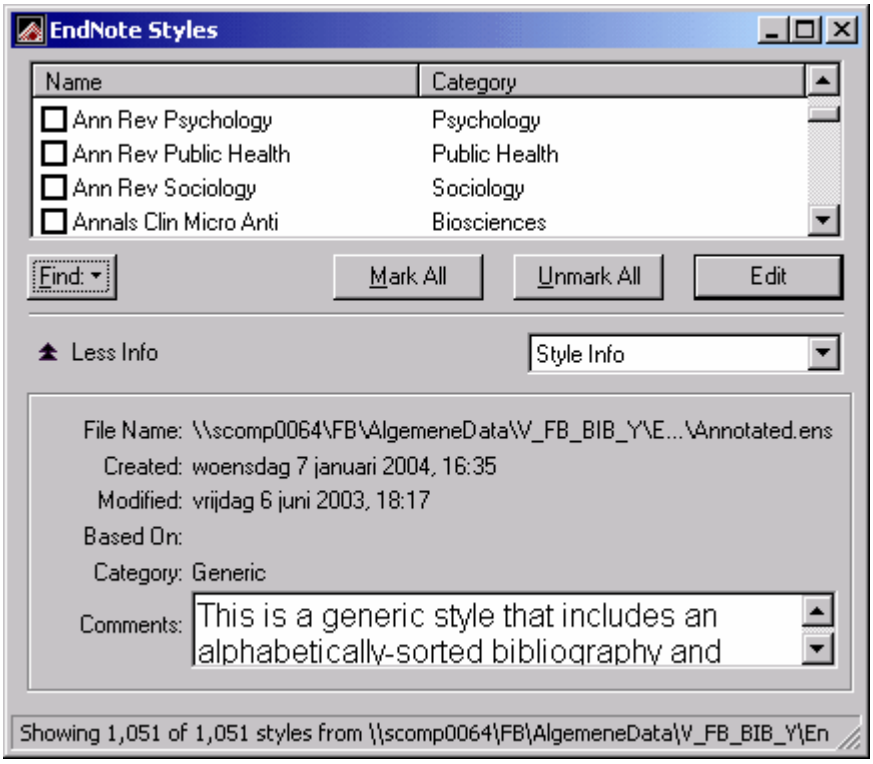


Figure 23. Select styles window

5 Integration with MS-Word

In addition to being a reference database, EndNote is a reference list maker. EndNote is integrated with your word processor to include in-text citations and to create a reference list formatted according to the instructions for authors of hundreds of scientific journals. This part discusses integration with MS Word, but integration with WordPerfect is equally possible. It is assumed that the EndNote add-in tools are already integrated with your favourite word processor during installation of Endnote.

- Include references in a document 29.
- Format reference lists according to another journal style. 30

5.1 Include references in a document

On succesful installation of EndNote on your computer, MS Word shows the EndNote toolbar (Figure 24). You can place the EndNote toolbar between the other toolbars. If the EndNote toolbar is not visible in Word, consult our FAQ.

Figure 24. EndNote toolbar for Word

Basic steps to cite a reference:

1. Start MS Word and open the document

© 2005 Wageningen UR Library

2. Put the cursor in the text where you would like to insert a citation
3. Start EndNote by clicking **Go To Endnote** on the EndNote Toolbar
4. Open the library and select the reference you want to cite
5. Choose **Insert Selected Citation(s**) from the Word toolbar. EndNote inserts the selected citation and adds the reference at the end of the document according to the style currently selected in EndNote.
6. Click the **Save** button (Crtl+S) to save changes to your Word document

5.2 Format reference lists according to another journal style

1. Start MS Word and open your document
2. Select **Format Bibliography** from the Endnote toolbar in Word.
3. Select a style from the **With output Styles** drop-down menu. Or select another style by using the **Browse** button (Figure 25).
4. After selecting the appropriate style click on the **OK** button. EndNote scans the paper for the temporary citations, replaces them by the formatted citation for the style selected, and appends a reference list or bibliography to the end of the document.

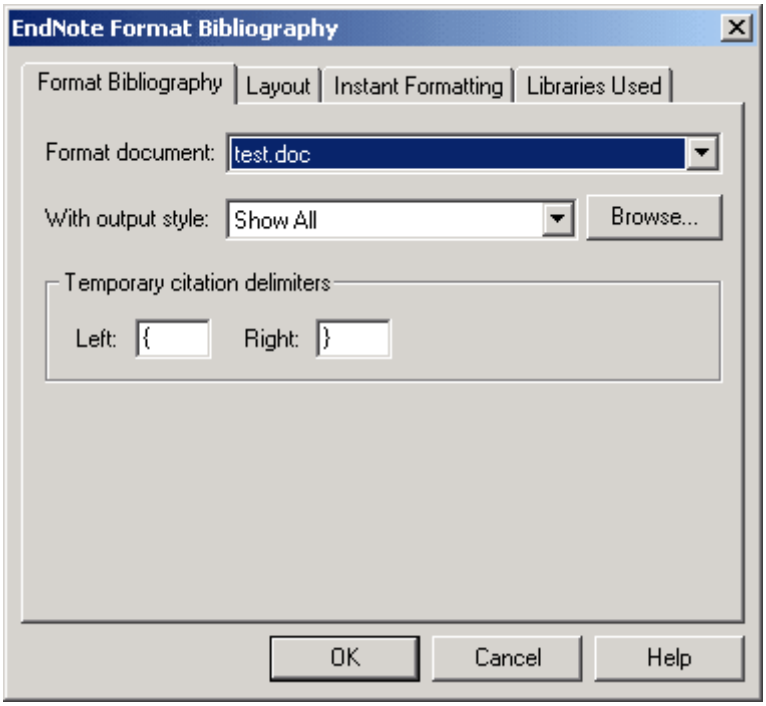


Figure 25. Format bibliography window in Word

© 2005 Wageningen UR Library

Index

- A -

abstract 9
add-in tools 29
alternate journal 9
author names 9

- B -

Boolean operators 26
browsing 25

- C -

capitals in reference 9
Cardbox 4
citation 29
Connecting 20
connection file 3, 7, 20
Connection to Wageningen catalogue 20
copy references between libraries 25

- D -

deduplication 28
direct export 11
displayed fields 25
download 13, 15, 17
duplicate references 28

- E -

Elsevier Journals 7, 11
Endote tool bar 29
enf 3
enl 3
ens 3
entering references 7, 9
enz 3
export 11
extension .enf 3
extension .enl 3
extension .ens 3
extension .enz 3

- F -

field 3
filter 3, 7
format 3
format bibliography 30
formatting references 30
full text link 9

- H -

HighWire press 7, 11

- I -

import filter 3, 7, 14, 16, 19
importing 14, 16, 19, 24
including references in a document 29
initials 9
insert citation 29
integration with MS Word 29
interpunction 9
in-text citations 29
issue 9
italics in references 9

- J -

journal 9
journal names 9
journal style 28

- K -

keywords 9

- L -

label 9
lettertype 9
library 3
library window 11, 14, 16, 19, 24

© 2005 Wageningen UR Library

link to pdf 9
- M -

main toolbar 7
manual 3
MS Word 29
- N -

new library 5
new reference 9
notes 9
- O -

omit from showing references 26
open library 7
output style 3, 28, 30
- P -

page numbers 9
pages 9
Preferences 25
preview 14
print references 28
PubMed 7, 17, 19
- R -

record number 3
reference 3, 7, 9
reference list 29, 30
Reference Manager (RIS) filter 24
reference type 3, 9, 26
remote search 20
removing duplicates 28
retrieving references 20, 21, 22
- S -

saving a library 5
saving a reference 9
Science Citation Indexes 7, 11
ScienceDirect 7, 11
search references 26
searching 26
show preview 11, 14, 16, 19, 24
software 4
sort references 25, 28
sorting 25
Spirs(WUR).enf 7, 14
start EndNote 5
style 3, 28, 30
summary 9
support 4
- T -

text style toolbar 7
title 9
toolbars 7, 29
transfer references between libraries 25
- U -

url 9
- V -

volume 9
- W -

Wageningen catalogue 7, 20, 21, 22, 24
Web of Science 7, 11
WebSpirs 7, 15, 16
WinSpirs 7, 13, 14
WordPerfect 29
- Y -

year 9
year of publication 9

© 2005 Wageningen UR Library