WAGENINGEN UR
For quality of life

Endnote 7

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Endnote 7

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1 Introduction

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 bibliography maker. It builds lists of cited works automatically in any format or journal style within the word processing programme Microsoft Word, facilitating the compilation of bibliographic reference lists of articles, reports or books.

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 are assumed.

In this brief manual not all possibilities of EndNote are mentioned. 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 as an Internet version. Consult the Help function from the menu bar of EndNote for online help.

Tip 1 For employees of Wageningen UR, EndNote support files are created. 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/ Files are added or updated on a regular base.

Tip 2 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\.

Tip 3 There is no default field for the language of the publication. If you wish to store this information, make changes in the so-called Reference Types Table. Rename the field Custom 2 in Language for all the reference types. In the original manual it is described how to do this step by step. The language of publication from the Web/WinSpirs databases is transferred to this new field Language when using the filter Spirs(WUR).enf (see Tip 1).

Cardbox databases can be imported into EndNote. However, in general this procedure results in all kind of problems. Usually problems are related to the lack of a reference type field in the Cardbox database, with inconsistencies in the source field in the Cardbox database, or the lack of a specific separation symbol between two authors in the Cardbox database.
Wageningen UR Library provides a general filter to convert Cardbox databases with the PUDOC format into an EndNote library. The references are fully searchable. However, when you cite references from this converted Cardbox database in your ducument, the information of these references has to be placed in the appropriate fields. Only after assigning appropriate fields, the references will be formatted according to the journal style. The Cardbox filter (Cardbox(WUR).enf) is available in EndNote import filters at http://library.wur.nl/endnote/.

1.1 What will you learn in this course?

During the course Working with EndNote you will learn:

- How to use EndNote to store details of references

- How to add references you have downloaded to an EndNote library

- How to use EndNote to search in catalogues

- How to manage data in EndNote

- How EndNote can automatically insert references in your texts and create reference lists

- How to use EndNote to manage figures and graphs

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.

- **reference**

  A library can store up to 32.000 references (or 32 MB). EndNote automatically assigns a unique number to each reference. You cannot change this record number. EndNote uses this number to format reference lists. Each reference can grow to accommodate roughly 16 pages of text (64.000 characters).

- **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 according to a specific journal style, and usually a book has to be formatted in another way than a journal article, and so on.

- **field**

  Every EndNote reference consists of a number of fields: Author, Title, and Year etc. This is essential because EndNote must manipulate the filed contents when formatting a refernce according to a specific journal style. Sometimes the journal title has to be in italics, or the volume numbers in bold. To be able to apply these styles, EndNote distinguishes the information in the various fields. The maximum number of fields is 41 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 EndNote. Various information providers have different ways to organize reference data in a database, for example CAB, Current Contents, databases from other bibliography formatting software, or spreadsheets. You need a filter to import data into EndNote. EndNote filters always have the extension .enf (EndNote filter).

- **style**

  Styles are the files that EndNote uses to determine how to arrange references for a wide variety of bibliographic formats. They format in-text citations, footnote citations and bibliographies. Styles 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 around 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 citatations and reference lists appear in a specific journal style when writing a word 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. The connection files EndNote uses for this process have the extension .enz. EndNote provides several connection files.

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 and then select the EndNote program

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.
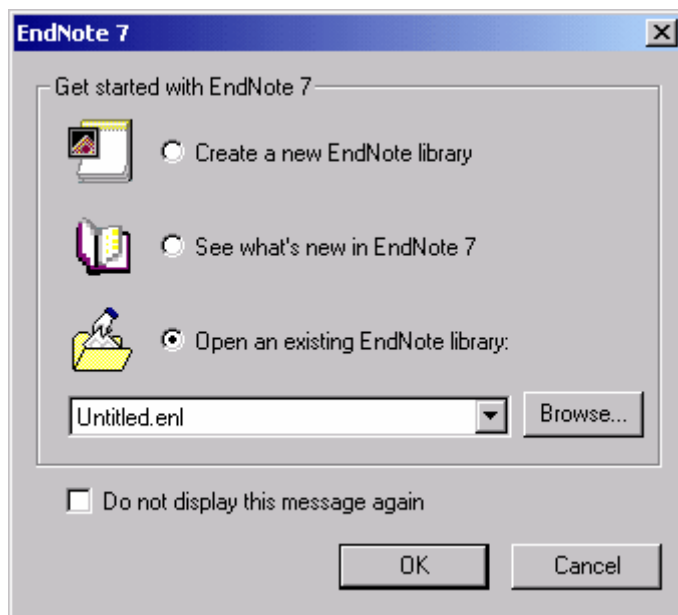
Figure 1. Intial dialogue box

Create a new library:

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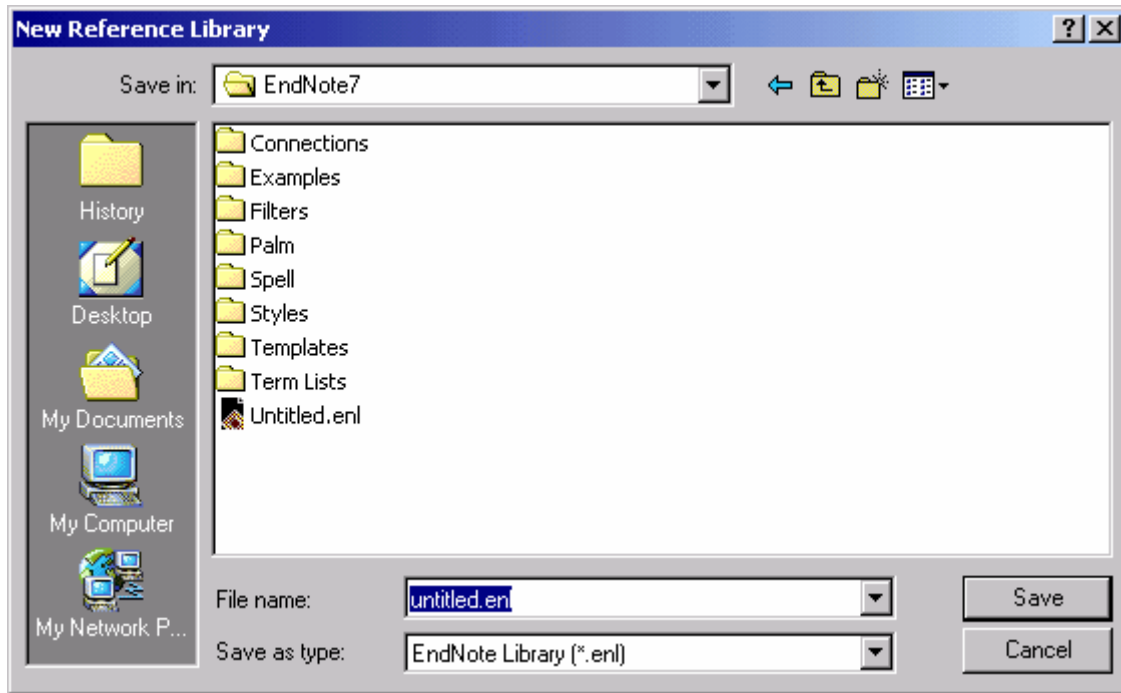
Figure 2. New library dialogue box

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).
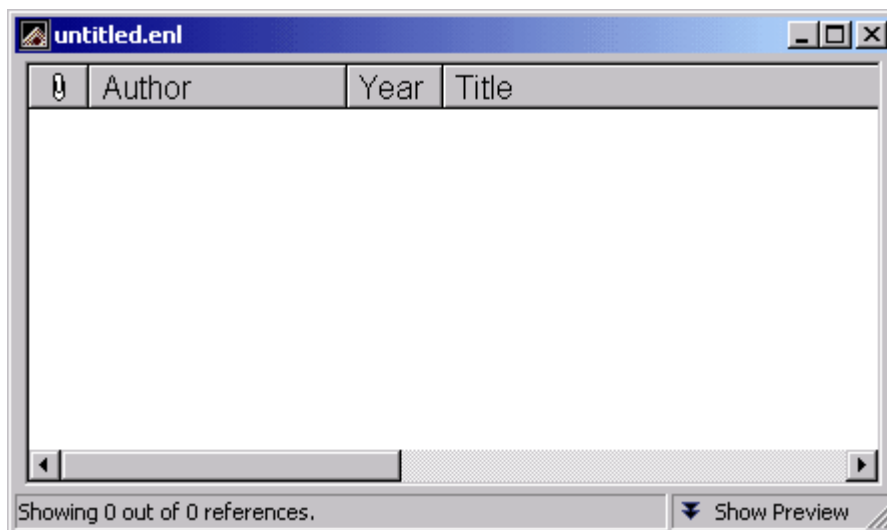
Figure 3. New library window

2.2 Displaying the toolbars

Often the toolbars are 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 exisiting library:

1. Click the **Browse...** button in the initial dialogue box () to select the name of the library

2. Click on the **OK** button.

Alternatively, if the intial dialogue box () 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 th **File** menu and then **Open Library....** Locate the library file on you computer.

3 Add references to a library

There are several ways to add references to a library:

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- (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

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  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 ..\endnote\filters\.

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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 ..\endnote\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.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 ..\endnote\connections\.

- Retrieve references from the Wageningen catalogue with a downloaded file [23]

  In this option references from Wageningen catalogue are downloaded and imported into you 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.

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)
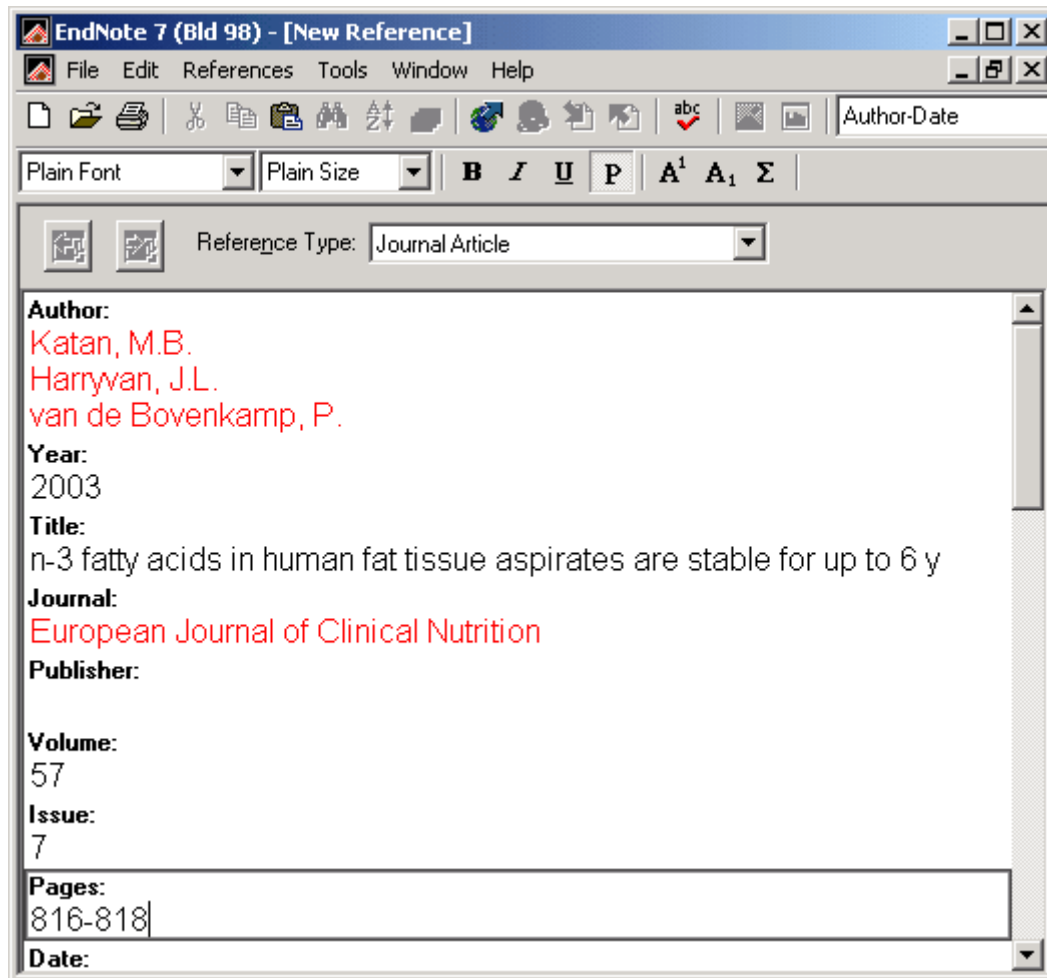
Figure 6. New Reference window

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, i.e. "Katan, M.B."or "Katan, Martijn B." or "M.B. Katan" or "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.

- **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>. Also used to link to a file on disk.

Once you have completed the New Reference window, the reference will be automatically saved on 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 (Figure 8 13).

Author & editor names.

The author fields are so-called intelligent fields. EndNote can distinguish between first names and family names.

Best practice is to enter last name first followed by a comma and then the initials. Spaces or points should separate the initials. However, first names can be completed as whole. Depending on the style selected for the bibliography EndNote can abbreviate first and middle names. The following are all correct ways.

- Katan, M.B.
- Katan, Martijn B.
- Martijn B. Katan
- M.B. Katan

For complex author names it is advised to enter the last name first.

- van der Heijden, Willem B.
- van der Heijden, W.B.

or

- de T. Alvim, Paulo
- de T. Alvim, P.

Corporate names should be entered with a comma at the end.

- Food and Agriculture Organization,
- World Bank,

3.2   Direct export from databases

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

1. Start EndNote. In order to be able to check whether references are imported in the correct way, it is recommended to create a new library. After performing this check and improving the import results, you can easily merge the new library with an existing library

2. From the **File** menu, select **New…**

3. Provide the name, drive and directory for the new EndNote library. Click the **Save** button. An empty library with the new name in the title bar appears.

4. Minimize EndNote

5. Start your browser and go to the shortcuts section of the Desktop Library (http://library.wur.nl/desktop/direct/index.html)

6. Select Web of Science.

7. Perform a search in Web of Science, e.g. by selecting the **full search** option and performing a **general search** in the Science Citation Index Expanded.

8. Mark records by checking the box to the left of the reference. Or mark records by clicking the **Mark Page** or **Mark All** button above the references.

9. Click the **Marked List** button on the toolbar to go to the Marked List page. The **Marked List** button appears only after you mark records. On the Marked List page check boxes for Author, Title and Source are selected by default (Figure 7).

10. Select additional fields to export by checking other boxes, e.g. keywords and abstract
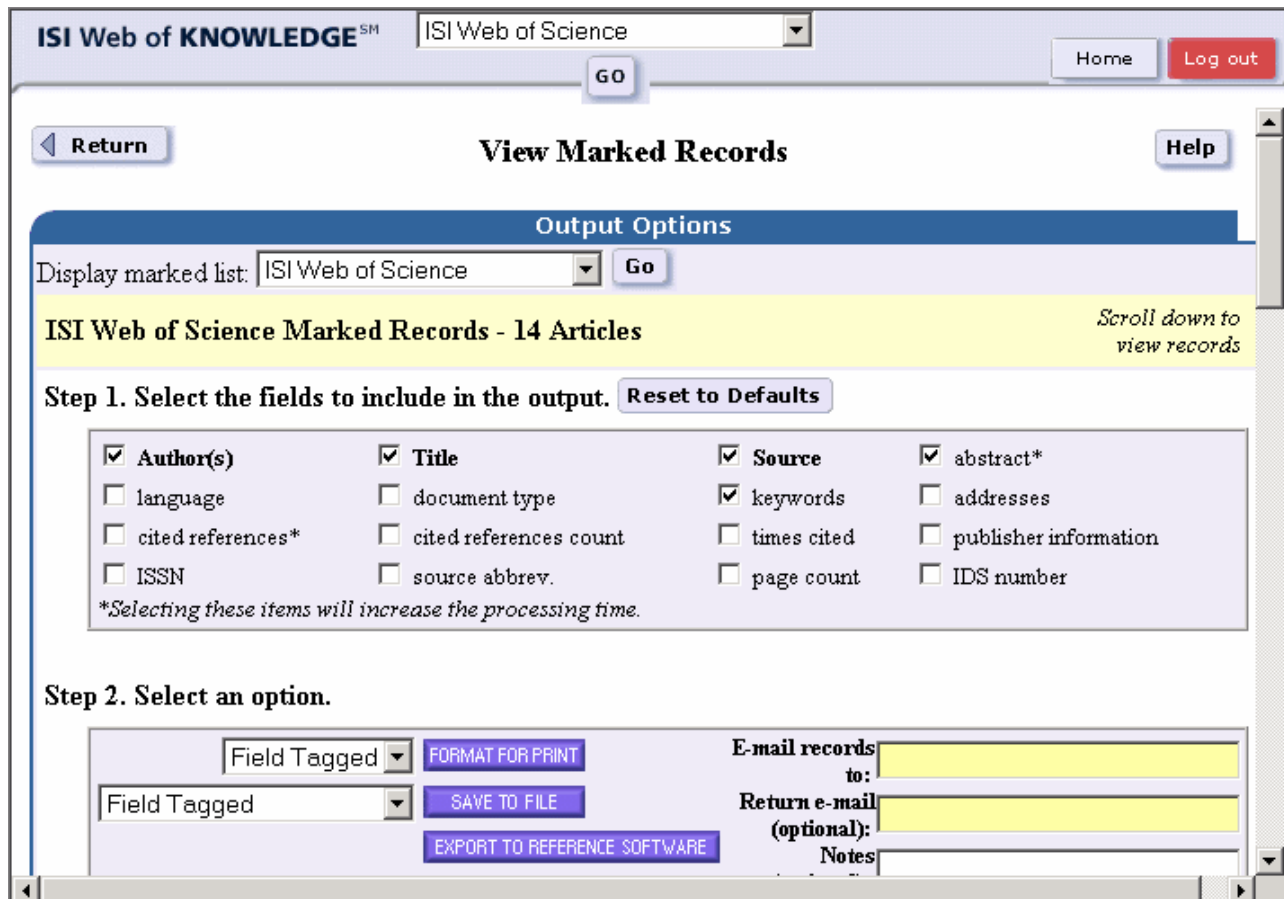
Figure 7. View marked records window from Web of Science with the abstract and keywords marked as additional download fields.

11. 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 EndNote automatically starts.

12. Select the name of the library in which you want to store the references (the file you created in the first 3 steps of this instruction). The records will be transferred to your library (a counter keeps track of the number of records processed). 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 8 [13]). 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

After checking the library and editing (if necessary) you can add this library to your final library:

1. Close all open references

2. From the **Edit** menu on the menu bar, choose **Select All**. Click again **Edit** and subsequently **Copy**.

3. Open the final library

4. Select **Edit** from the menu bar and then **Paste**. The references from the first library will be pasted in alphabetical order between the references in the final library

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

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 [13]

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.

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. In order to be able to check whether references are imported in the correct way, it is recommended to create a new library. After performing this check and improving the import results, you can easily merge the new library with an existing library.

2. Click on the **File** menu, and choose **New…**

3. Provide the name, drive and directory for the new EndNote library.

4. Click on the **Save** button. An empty library with the new name in the title bar appears.

5. Select **Import...** from the **File** menu. A pop up window appears.

6. Click the **Choose file** button. Complete the window with the drive, directory and file name of the downloaded file.

7. Select other files from the **Import Option** drop down menu. A list of options appears.

8. Select **Spirs(WUR).enf** (or **Econlit(WUR).enf** when the search was performed in Econlit *etc*).

9. Click on the **Choose** button. When these filters do not appear, look at the beginning of this chapter for instructions to download these filters.

10. 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 8 [13]). 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.

11. Click on the **Show Preview** button at the bottom of the Library window. Now the selected reference appears in the preview pane.

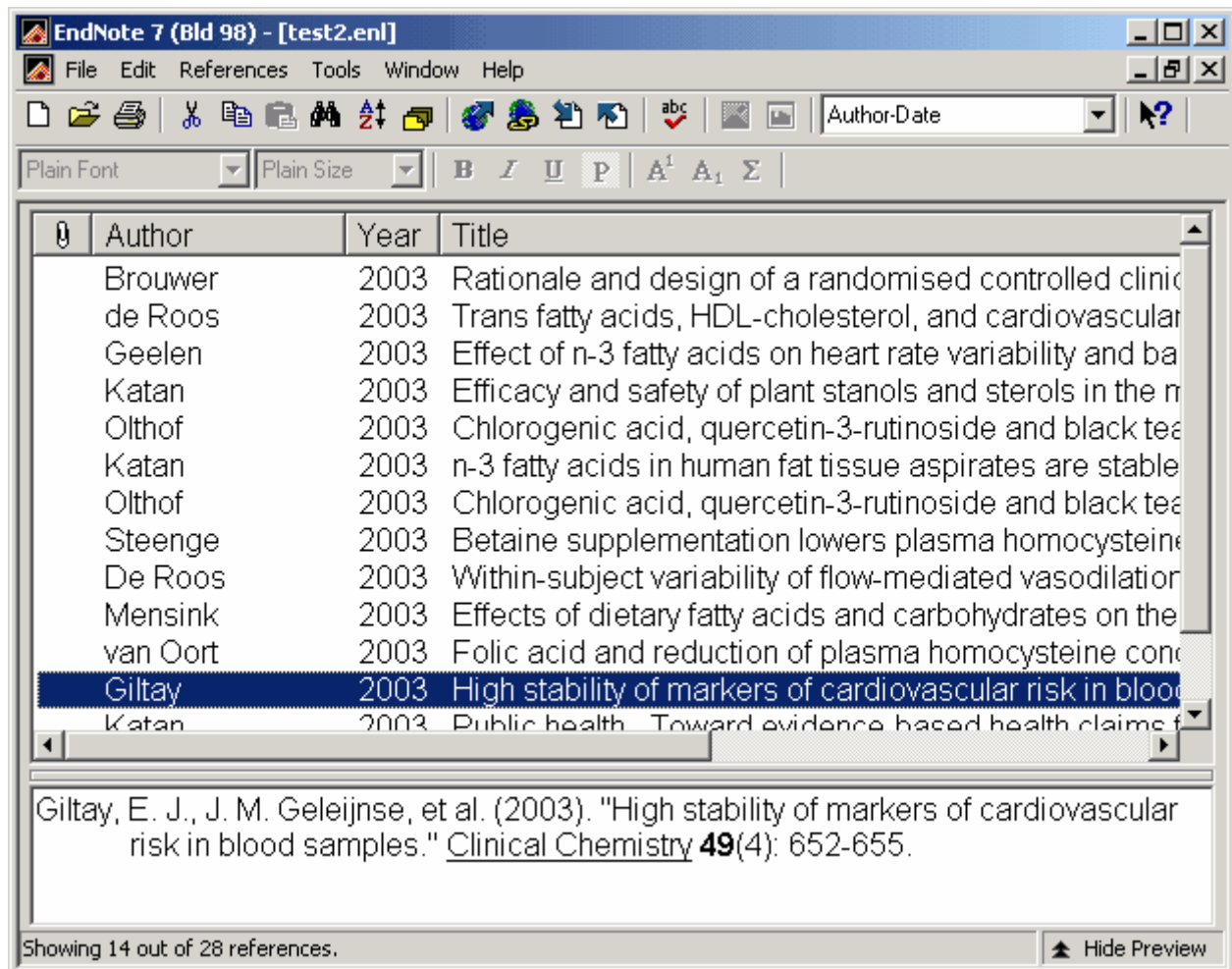12. Double click on a reference to edit the reference.

Figure 8. Library window.

After checking the library and editing (if necessary) you can add this library to your final library:

1. Close all open references

2. From the **Edit** menu on the menu bar, choose **Select All**. Click again **Edit** and subsequently **Copy**.

3. Open the final library

4. Select **Edit** from the menu bar and then **Paste**. The references from the first library will be pasted in alphabetical order between the references in the final library

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 Netscape).

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 9. Select **All records** (or **Marked records** when desired), **Complete Record** and **Short labels**. Do not check boxes for **Record Number and database name**, and **Word wrapping**

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

Figure 9. Completed download screen from WebSPIRS

3.4.2 Import a WebSpirs download into a library

1. Start EndNote. In order to be able to check whether references are imported in the correct way, it is recommended to create a new library. After performing this check and improving the import results, you can easily merge the new library with an existing library.

2. Click on the **File** menu, and choose **New…**

3. Provide the name, drive and directory for the new EndNote library.

4. Click on the **Save** button. An empty library with the new name in the title bar appears.

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 other files from the **Import Option** drop down menu. A list of options appears.

8. Select **Spirs(WUR).enf** (or **Econlit(WUR).enf** when the search was performed in Econlit *etc*).

9. Click on the **Choose** button. When these filters do not appear, look at the beginning of this chapter for instructions to download these filters.

10. 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 8 ⌐13⌐). 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.

11. Click on the **Show Preview** button at the bottom of the Library window. Now the selected reference appears in the preview pane.

12. Double click on a reference to edit the reference.

After checking the library and editing (if necessary) you can add this library to your final library:

1. Close all open references

2. From the **Edit** menu on the menu bar, choose **Select All**. Click again **Edit** and subsequently **Copy**.

3. Open the final library

4. Select **Edit** from the menu bar and then **Paste**. The references from the first library will be pasted in alphabetical order between the references in the final library

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. On the search results page select **MEDLINE** from the **Display** drop-down menu (Figure 10).

6. Choose **File** from the **Send to** drop-down menu, and click on **Send to**.

Figure 10. Search results page

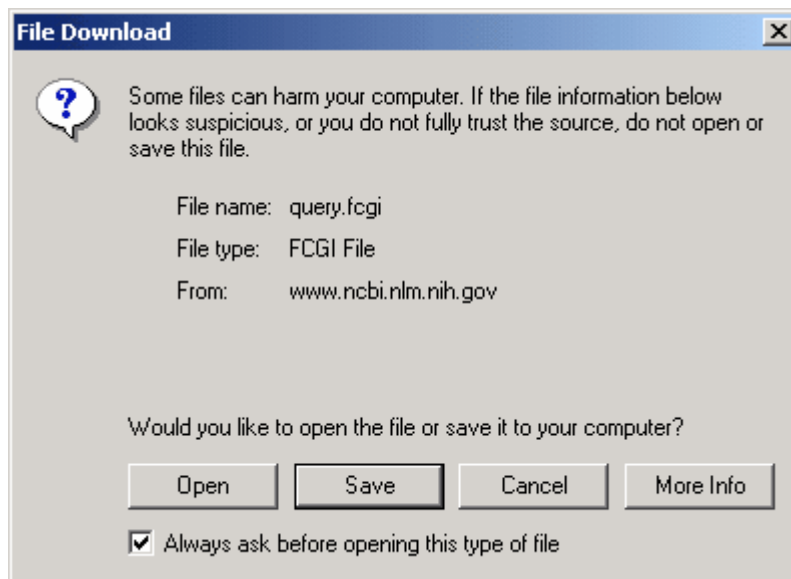7. Select **Save** in the next screen (Figure 11).

Figure 11. 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 12)
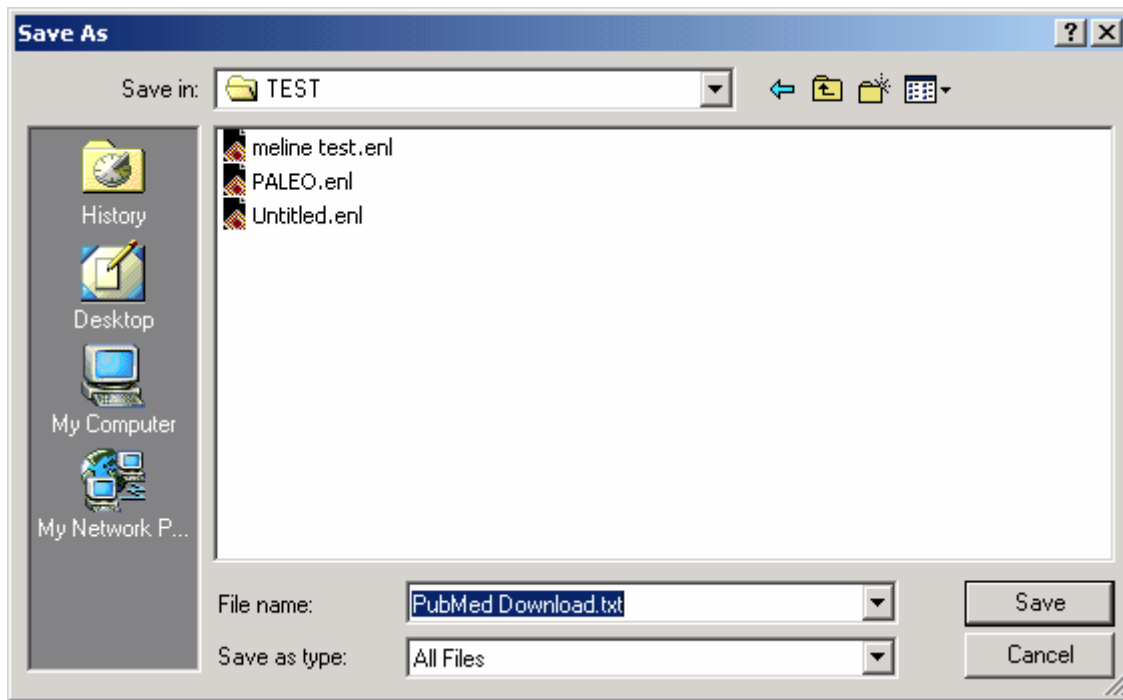
Figure 12. Save as window

3.5.2   Import a PubMed download into a library

1.   Start EndNote. In order to be able to check whether references are imported in the correct way, it is recommended to create a new library. After performing this check and improving the import results, you can easily merge the new library with an existing library.

2.   Click on the **File** menu, and choose **New…**

3.   Provide the name, drive and directory for the new EndNote library.

4.   Click on the **Save** button. An empty library with the new name in the title bar appears.

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 other files from the **Import Option** drop down menu. A list of options appears.

8.   Select **PubMed(WUR)**.

9.   Click the **Choose** button. When these filters do not appear, look at the beginning of this chapter for instructions to download these filters.

10. 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 (<u>Figure 8</u> 13). 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 <u>information specialist</u> for assistance.

11. Click on the **Show Preview** button at the bottom of the Library window. Now the selected reference appears in the preview pane.

12. Double click on a reference to edit the reference.

After checking the library and editing (if necessary) you can add this library to your final library:

1. Close all open references

2. From the **Edit** menu on the menu bar, choose **Select All**. Click again **Edit** and subsequently **Copy**.

3. Open the final library

4. Select **Edit** from the menu bar and then **Paste**. The references from the first library will be pasted in alphabetical order between the references in the final 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 [21]

*   Retrieve references from the catalogue into an EndNote library [22]

3.6.1   Make a connection to Wageningen Catalogue

1. Start EndNote. In order to be able to check whether references are imported in the correct way, it is recommended to create a new library. Only after performing this check and improving the import results, you can easily merge the new library with an existing library.

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 13). In the window with Search "Wageningen catalogue at Wageningen UR Library" in the title bar, the box **Search Remote** is checked
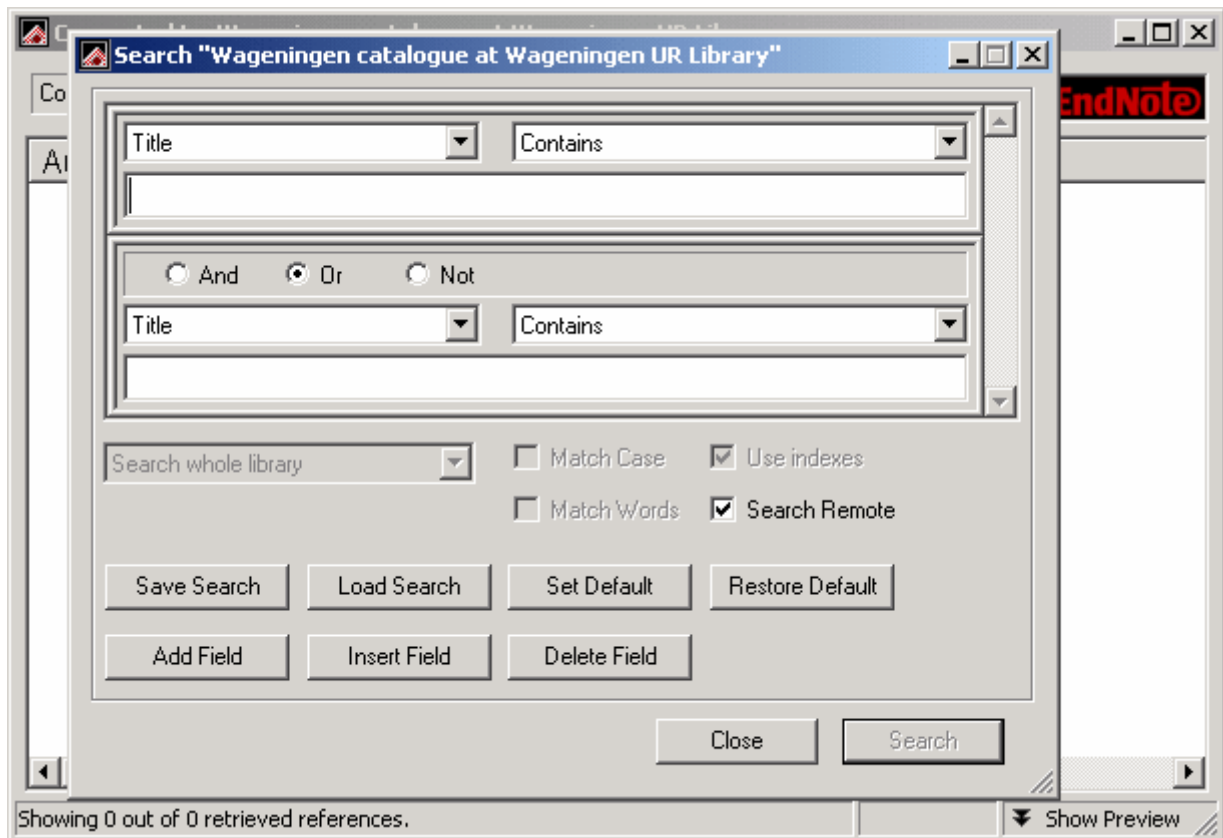
Figure 13. Connection windows that open on selecting a connection file

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 Search "Wageningen catalogue at Wageningen UR Library" in the title bar (Figure 14)

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 15).
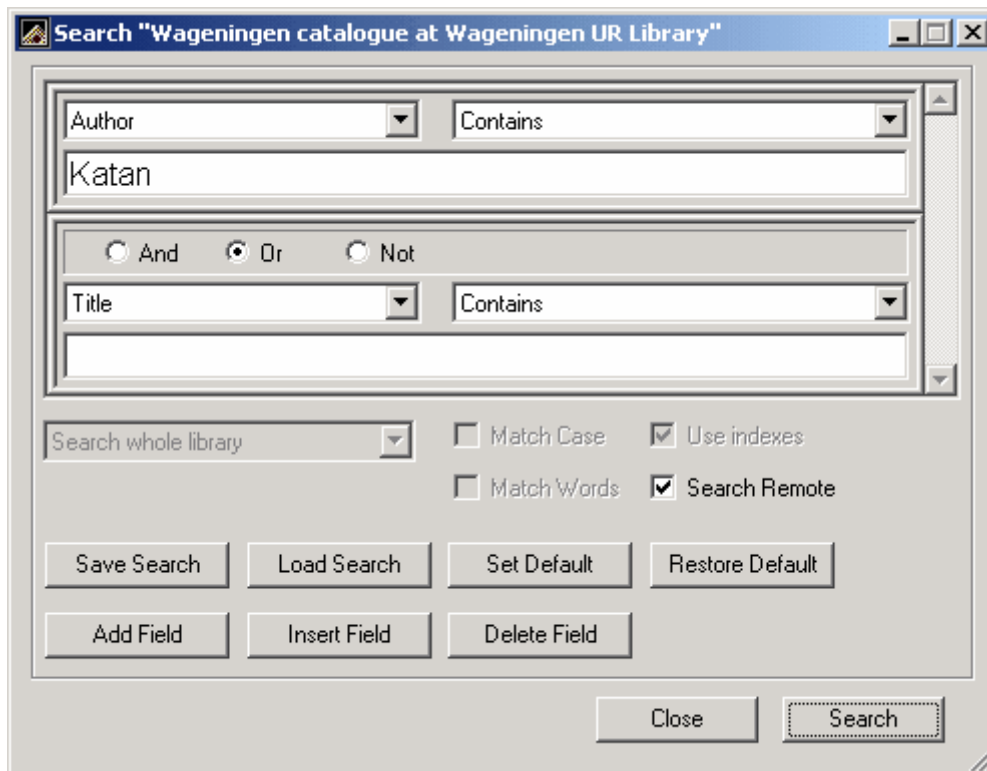
4.   Click on the **OK** button
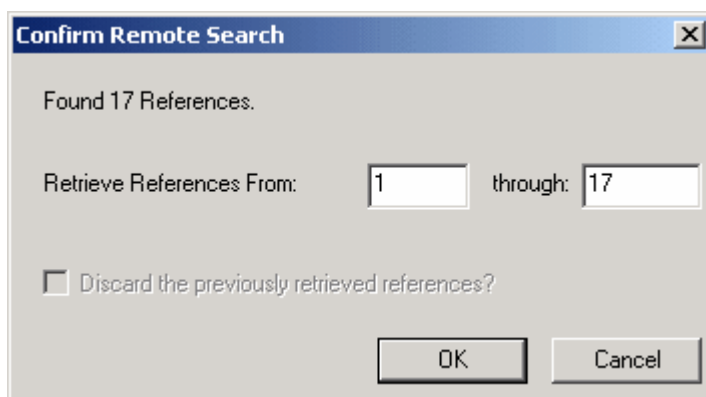
Figure 14. Search window for a remote search

Figure 15. 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 'Connected to: Wageningen catalogue at Wageningen UR Library' in the title bar will be filled with references (Figure 16). 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. Make sure that **Search Remote** box is checked in the window with Search

"Wageningen catalogue at Wageningen UR Library" in the title bar. If this box is not checked, the searches are performed in your own EndNote library.
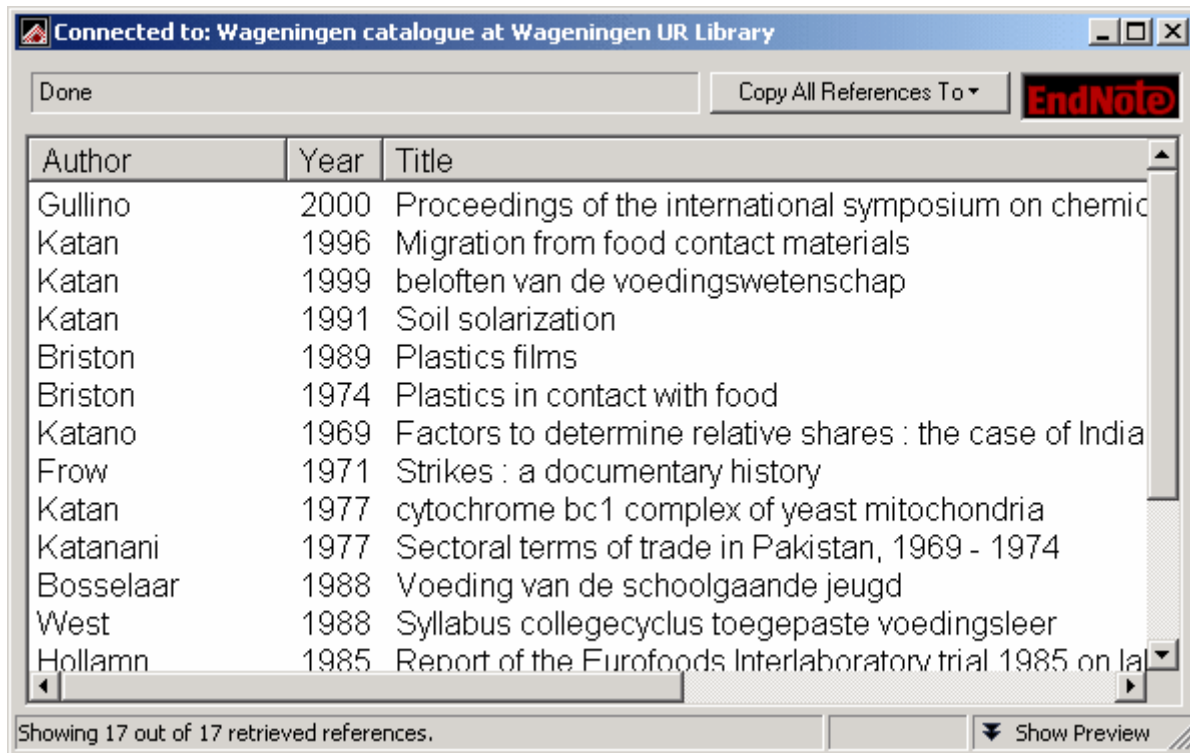

Figure 16. Connection window

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 Connected to … and the other with the title bar Search ….) by clicking the cross in the upper right-hand corner.

After checking the library and editing (if necessary) you can add this library to your final library:

1. Close all open references
2. From the **Edit** menu on the menu bar, choose **Select All**. Click again **Edit** and subsequently **Copy**.
3. Open the final library
4. Select **Edit** from the menu bar and then **Paste**. The references from the first library will be pasted in alphabetical order between the references in the final library

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 24
*   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. After obtaining your results, click on the **print/save** button ![print/save].

3. A new window opens (Figure 17). Check the **Tagged format (EndNote compatible)** radio button.

4. Select the approriate **Maximum** number of records per page (500 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.

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.
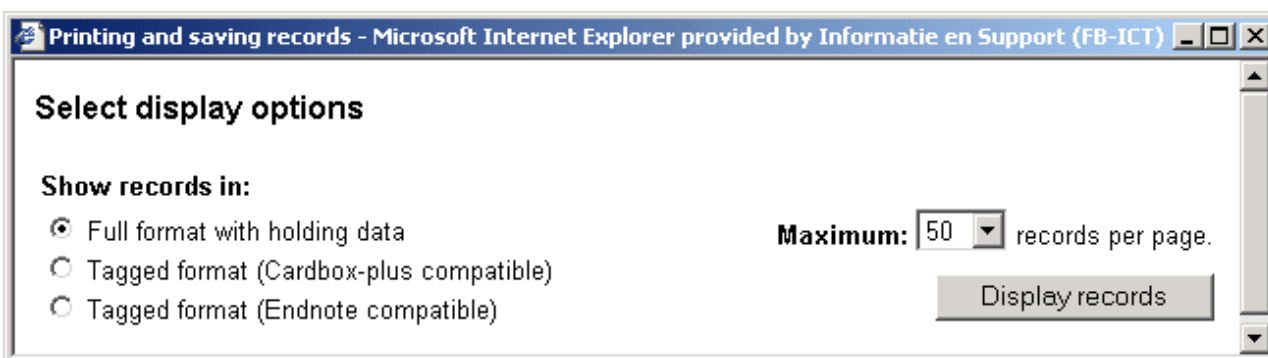
9. Click on **Save**

Figure 17. Saving records window from Wageningen catalogue

3.7.2   Import a Wageningen catalogue download

1. Start EndNote. In order to be able to check whether references are imported in the correct way, it is recommended to create a new library. After performing this check and improving the import results, you can easily merge the new library with an existing library.

2. Click on the **File** menu, and choose **New…**

3. Provide the name, drive and directory for the new EndNote library.

4. Click on the **Save** button. An empty library with the new name in the title bar appears.

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 **EndNote import** in the **Import Option** drop down menu.

9. Click on the **Choose File** button.

10. 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 8 [13]). 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.

11. Click on the **Show Preview** button at the bottom of the Library window. Now the selected reference

appears in the preview pane.

12. Double click on a reference to edit the reference.

After checking the library and editing (if necessary) you can add this library to your final library:

1. Close all open references

2. From the **Edit** menu on the menu bar, choose **Select All**. Click again **Edit** and subsequently **Copy**.

3. Open the final library

4. Select **Edit** from the menu bar and then **Paste**. The references from the first library will be pasted in alphabetical order between the references in the final library

4 Manage libraries

Managing libraries:

- Transfer references between libraries 25
- Deduplicate 29
- Search 25:
  - Browse 26
  - 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

3. Select **Copy** (Ctrl+C) from the **Edit** menu. Use **Select All** (Ctrl+A) from the **Edit** menu to copy the complete library

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 26
- 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.   Select authors by typing the first letter of the author's last name

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)

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. Detailled information on specific searches can be found in the EndNote manual (Chapter 8). In this topic the library included with EndNote …\endnote\examples\paleo.enl will be used.

To perform searches:

1.   Open the library ....\endnote\examples\paleo.enl

2.   Select **Search References...** (Ctrl+F) from the **References** menu. The Search window appears (Figure 18).

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.

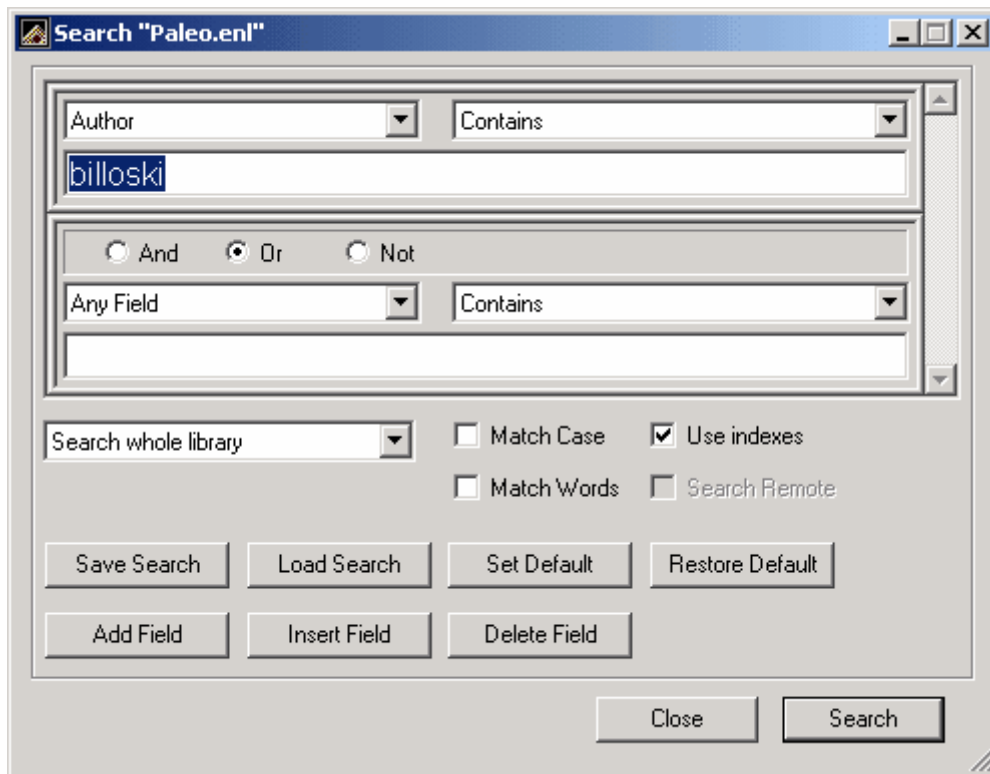6.   Select **Show All** (Ctrl+M) from the **References** menu to return to the full set of references

Figure 18. Search window with biloski 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 \endnote\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 19)
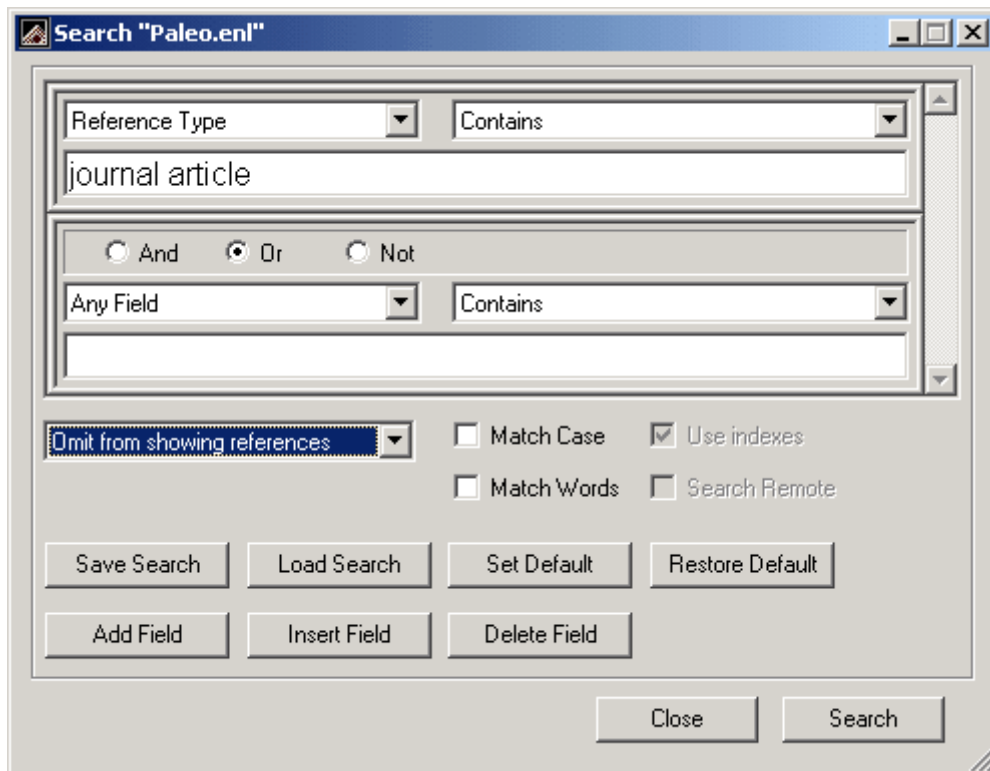
Figure 19. Search window with Omit from showing references selected

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 19).

11. Increase the number of search boxes by clicking the **Add Field** button (Figure 20)

12. Search for references from the authors Billoski and Whiting or from the authors Billoski and Schwartz.

13. 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.
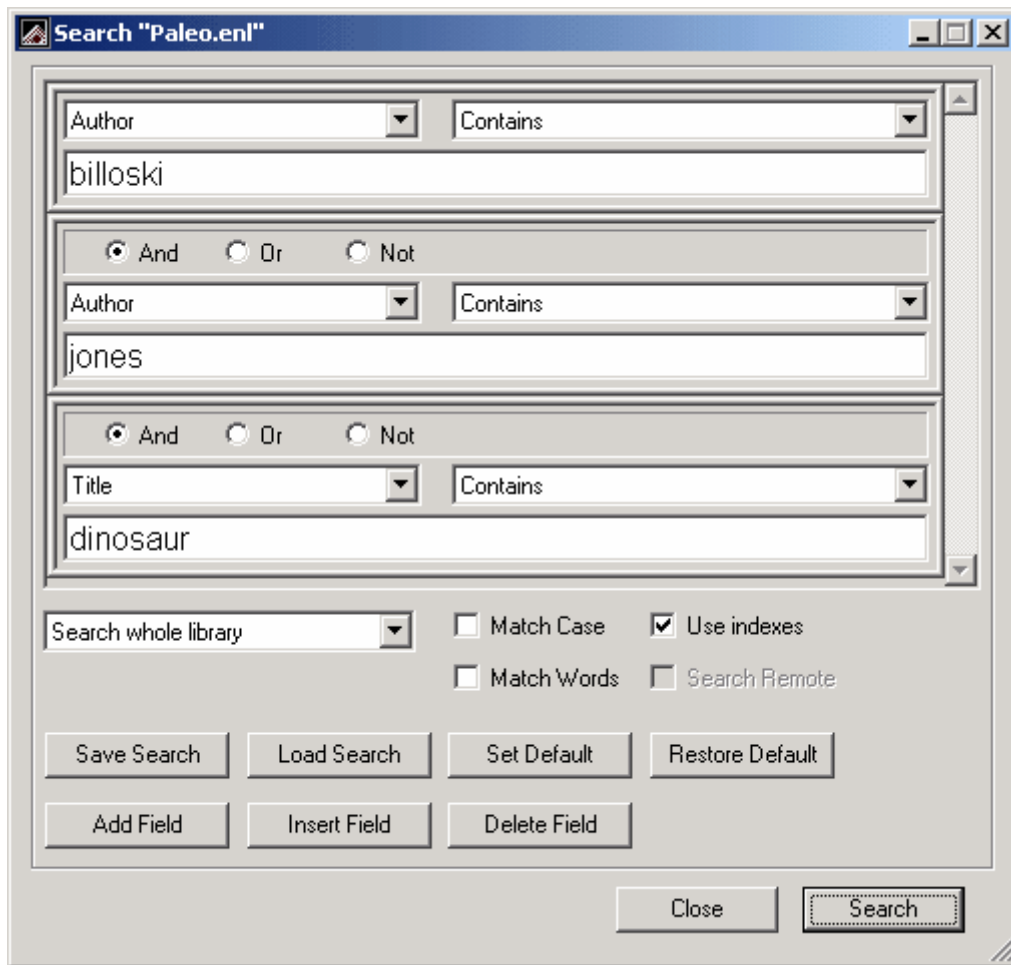
Figure 20. Search window with one search field added

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. 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 Library** 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 21)

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.
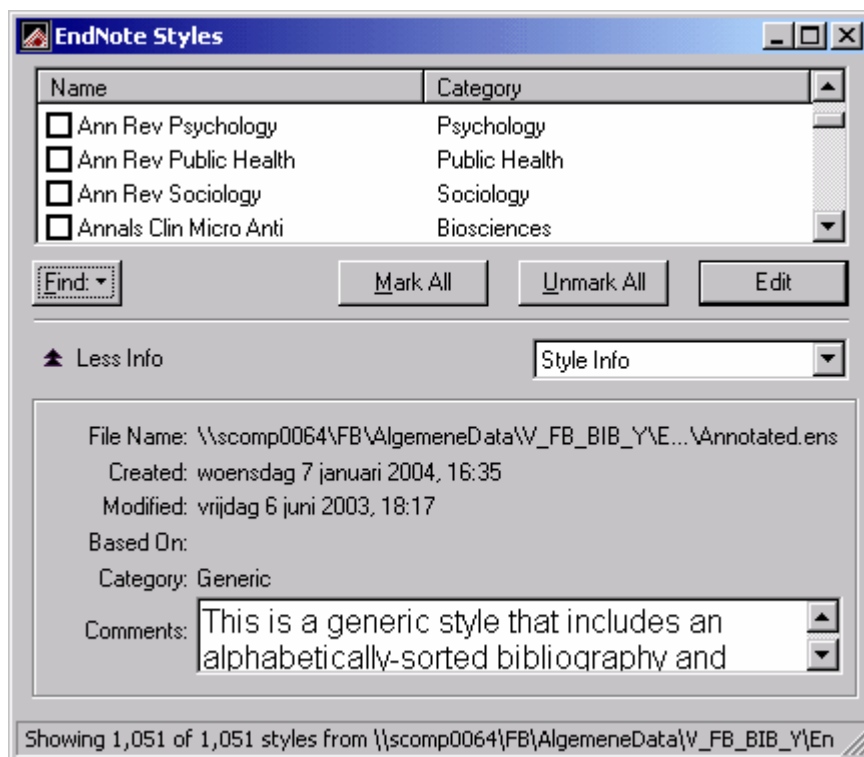
11. Click on the **OK** button.

Figure 21. Select styles window

5   Integration with MS-Word

In addition to being a reference database, EndNote is also 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 31.

- Format reference lists according to another journal style. 31

5.1   Include references in a document

On succesful installation of EndNote on your computer, MS Word shows the EndNote toolbar (Figure 22). You can place the EndNote toolbar between the other toolbars. If the EndNote toolbar is not visible in Word, consult our FAQ.

Figure 22. EndNote toolbar for Word

Basic steps to cite a reference:

1. Start MS Word and open the document

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 23).

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 bibliography to the end of the document.
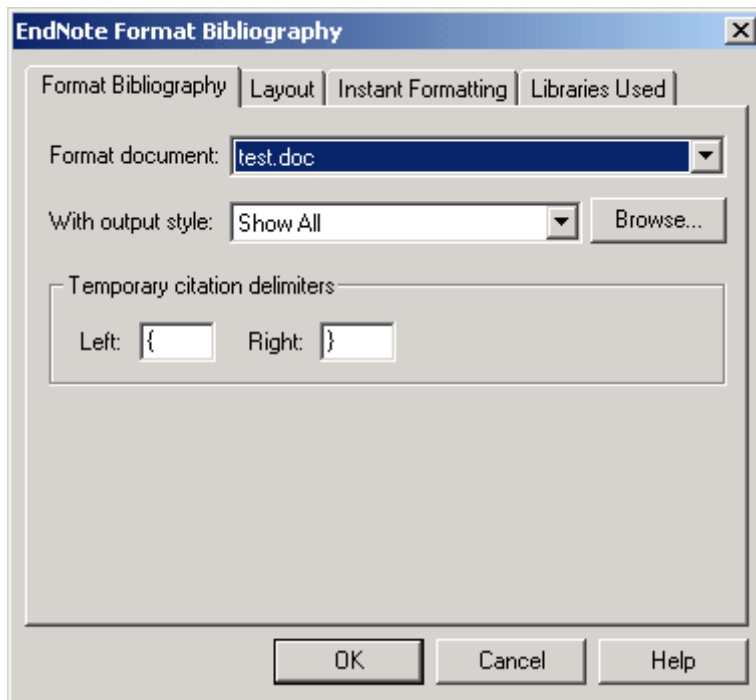
Figure 23. Format bibliography window in Word

6   Managing figures and tables with EndNote

The ability to manage figures and tables with EndNote is one of the major reasons for upgrading from EndNote version 5 to version 7.

In this chapter the basics of figure and table management are explained.

- [Storing figures and tables in an EndNote Library](#) 32
- [Inserting figures and tables into a Word document](#) 33

6.1   Storing figures and tables in an EndNote Library

All figures and tables added to your library are actually stored in a .DATA folder in the same folder as the library. If you copy or move the library you must also copy or move the .DATA folder.

You can insert only graphics into the Image field of the reference. The following image formats are supported in EndNote 7: BMP, GIF, JPEG and TIFF.

To store a figure in your library:

1. Start EndNote and open a library
2. Select **New Reference** from the **References** menu
3. Select **Figure** from the **Reference Type** drop-down menu at the top of the new reference window.
4. Although most of the fields are optional, a brief description in the **Title** field is recommended.
5. Insert the figure by selecting **Insert Picture...** from the **References** menu on the main.

6. Enter caption text in the **Caption** field of the new reference window. The text is a detailed description of the figure that is later included in the Word doument. The caption is limited to 245 characters in length.

7. Save the reference

To store a table in your library the procedure is very similar:

1. Start EndNote and open a library

2. Select **New Reference** from the **References** menu

3. Select **Table** from the In the **Reference Type** drop-down menu at the top of the new reference window

4. Although most of the fields are optional, a brief description in the **Title** field is recommended.

5. Insert the table by selecting **Insert Object...** from the **Reference** menu.

6. Enter caption text in the **Caption** field of the new reference window. The text is a detailed description of the table that is later included in the Word doument. The caption is limited to 245 characters in length.

7. Save the reference.

6.2   Inserting figures and tables into a Word document

 Inserting tables and figures into your document:

1. Start Word and open your document

2. Place the cursor at the position where you want to insert your figure or table

3. Click on the **Find Figures** button on the EndNote toolbar. A dialogue box opens which searches only for references which contain attached files. Text in any of the fields of these references will be searched.

4. Select the figure or table and click on the **Insert** button. EndNote inserts the citation of the figure or table, e.g. "(Figure 1)" or "(Table 2)". The position of the figures and tables and their captions depends on the output style.

6. Click on the **Save** button to save the document

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