



EndNote X8

Basic Course

George F. Smith Library of the Health Sciences



RBHS

Course Objectives

- At the end of this class you will be able to:
- Download and install EndNote.
- Create EndNote libraries, enter references manually, and import references from University Libraries (UL) databases and Google Scholar.
- Use Cite-While-You-Write (CWYW) with Microsoft Word to create bibliographies.
- Have a basic understanding of manuscript templates.

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EndNote X8

Groups Pane Library Window Layout Tab Citation Preview PDF Viewer

The screenshot shows the EndNote X8 interface. On the left is the 'Groups Pane' with a tree view of library groups like 'Avian Intelligence', 'Bats', and 'My Groups'. The main 'Library Window' displays a list of references with columns for Author, Year, and Title. A red arrow points to the 'Layout Tab' at the top of the window. Another red arrow points to the 'Citation Preview' area, which shows a preview of a selected reference. A third red arrow points to the 'PDF Viewer' on the right, which displays a PDF document. At the bottom left, it says 'University Libraries' and at the bottom right, 'George F. Smith Library of the Health Sciences'.

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Overview

- Organizes the references for papers, articles, grants etc. into an EndNote Library.
- Imports search results from PubMed, Google Scholar, OvidSP Medline & other library databases into the EndNote library.
- Formats the bibliographic record into thousands of styles. (e.g.) APA, JAMA, Chicago.
- Inserts a reference from the EndNote library into Microsoft Word documents & PowerPoint Slides.

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Get the program from the Rutgers website.

- Available for download via the University Libraries webpage; <https://www.libraries.rutgers.edu/endnote>
- Downloaded file requires unzipping.
- The file name is endnotex8.zip
- Installation on Rutgers computers may require administrative privileges. consult your department's IT support when installing.
- Can be installed on desktops, laptops, at home, dorm or office.

Download the EndNote zip file. Unzip it onto a home/personal computer

A guide to the extract process is available here

https://www.libraries.rutgers.edu/sites/default/files/health_sciences/EndNoteGraphicTutorial.pdf

Download via the University Libraries webpage here

<https://www.libraries.rutgers.edu/endnote>

1. Clicking on the downloaded file opens the file in the Windows default extract window.
3. Depending on the version of Windows the extract function will be to the left or above the main window.
4. Click Extract (where it appears in the program).

Download the EndNote zip file. Unzip it onto a home/personal computer (2)

Extract has now created a new folder with the two zipped files, that are now unzipped and ready for installation.

1. Locate this folder on the PC's desktop.
2. Open the folder and begin the installation process by clicking the file called ENX8Inst.

As the installation process continues a dialog box will offer the choices of Typical or Custom. **Choose Typical.**

This completes the installation process.

When launching EndNote X8 for the first time, do not integrate with EndNote Web. **Do Not Check the box**

Create a "shortcut" to the desktop or "pin" to the Start Up Menu

To create a shortcut the desktop or to the Start Up Menu do the following:

1. Drag the EndNote Icon found in the Program Folder to the desktop to create a shortcut or drag it to the start menu for easy access.
2. From the Windows Start menu navigate to EndNote.

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EndNote Toolbar

This is the Style pull down menu. To access the 5080 Styles choose "Select Another Style".

Create a New Reference

Find Full-Text Accessing Rutgers Subscribed Content

These three icons are for CWYW: Insert Selected Citation, Format Bibliography and Return to Word.

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Preferences/Display Fields

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Preferences/Display Fields (2)

Use the Edit pull down menu to launch the “EndNote Preference” menu.

- By default the “Display Fields” will be available for editing first.
- “Display Fields” correspond to the fields contained in a reference e.g. author, year, title
- Changing any of the “Display Fields” will change the on screen appearance of EndNote.

Preferences/Display Fields (3)

- The default order of the “fields” displayed will be: attachments, author, year, article title, journal title, reference type, URL, and last update.
- The “Display Fields” can also be changed to include any of the available fields contained in a reference.
- There are also 8 custom fields available that an EndNote user can assign for specific purposes.

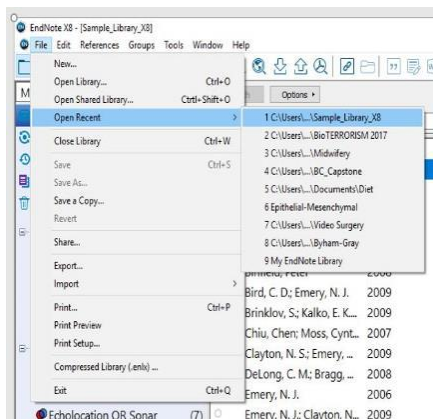
Create and Open/Close Libraries

EndNote calls the library “My EndNote Library;” rename the library to reflect the paper, manuscript or grant (e.g. Capstone Project)

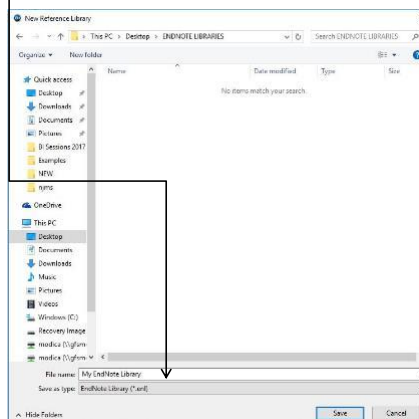
Saved in the “My Documents” on a Windows PC folder, the library and data folder have the same name but different file extensions (.enl and .data)

Open or Create EndNote Libraries

File/Open RECENT



Name the library



Open/Close EndNote library or bibliography

- EndNote libraries in either the compressed or non-compressed can be opened directly.
- Closing a library can be accomplished from the “File” menu, or by closing EndNote.
- A pop up asking to “Save” only occurs when creating or saving references. When a reference is “Saved” to the library it is permanent until it is either edited or deleted.

Save/Name EndNote library or bibliography.

- By default EndNote will name each new library “My EndNote Library” and it will chose the “Save as” destination as “My Documents”.
- Users should chose a name that reflect the “library’s” content.

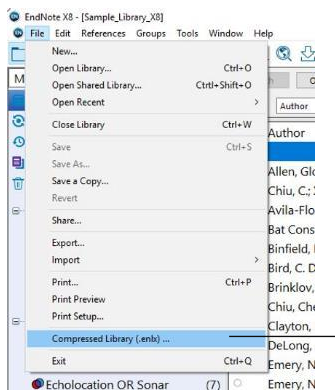
Open/Save when using a Jump Drive

Using a jump drive/flash/drive/thumb drive to save an EndNote library requires the use of the compress feature.

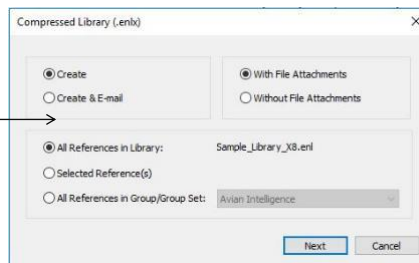
1. To compress an EndNote library choose “Compress Library .enlx” from the File Menu.
2. The “Compress Library .enlx” dialog box will open: choose “Create” as the first option, choose “with file attachments as the second option, choose “all references” as the third option and then click “next”.

Save and/or compress the EndNote Library

File/ Compressed Library (.enlx)



The Compressed Library dialog



Open/Save when using a Jump Drive (2)

- Saved Compressed Library (.enlx) will now display a Windows Explorer “Save As...” box.
 - By default “My Documents” will be “save as” destination.
 - By default the “File name” will be that of the existing EndNote library.
 - The “Save as type” will be (.enlx) indicating a compressed library.
3. Change the ‘save as’ destination to the drive letter that corresponds to your jump drive and “Save”.

Importing/Export References.

- Import options vary among databases.
- OvidSP databases “export” the references directly to the open EndNote library.
- PubMed requires extra steps: choose the MEDLINE format (on screen) and download references as a text file, then import the text file into EndNote.

Importing References Google Scholar.

1. Google Scholar: choose EndNote in the Google Scholar Preferences under Bibliography Manager.
2. Google Scholar: choose EndNote in the Google Scholar Preferences under Bibliography Manager.
2. "Show links to import citations to into..."
3. "Save Preferences" and exit Scholar preferences.

Google Scholar will now display a hyperlink option "Import into EndNote".

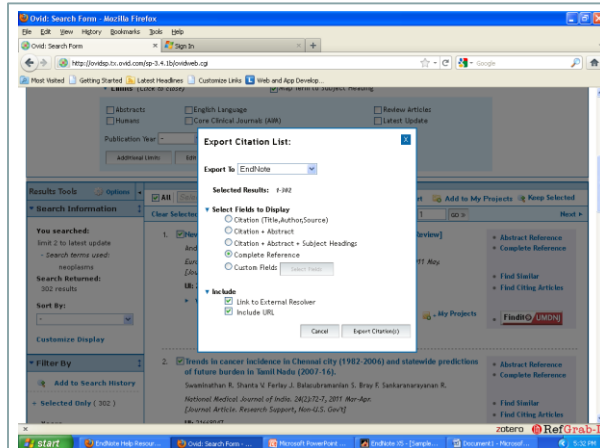
Each reference selected will need to be imported.

Note: References from Google Scholar will NOT contain all of the information that a Pub Med or Medline reference contains. Various fields will remain empty.

Importing References Google Scholar (2)

The screenshot shows the 'Bibliography Manager' preferences window. At the top, there are two radio buttons: 'Don't show any citation import links.' (unselected) and 'Show links to import citations into' (selected). Below the radio buttons is a dropdown menu that is open, showing a list of options: 'EndNote', 'BibTeX', 'EndNote', 'RefMan', 'RefWorks', and 'WanXianWang'. The first 'EndNote' option is highlighted. To the right of the dropdown menu is a 'Save Preferences' button. Below the dropdown menu, there is a green bar with the text 'Save your preferences when finished and return to search.'

Import/Export for OvidSP Medline



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Import/Export OvidSP Medline (2)

Follow these steps to export OvidSP Medline search results.

1. Select reference(s) from those displayed from the Ovid search results.
2. Use the Export button to open the export dialog box.
3. Change Microsoft Word to EndNote in the top pull down menu and then select the "Complete Reference" radio button.

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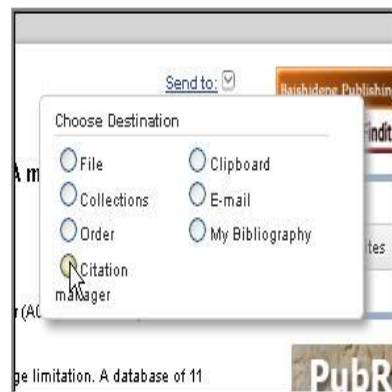
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OvidSP export (3)

4. Set the Export to go to EndNote and choose “Complete Reference,” clicking the Export Citation(s) button (as seen on screen lower right) begins the export.
 - If EndNote is closed it should open the program and ask which library the citation(s) should be directed to or it will export them directly into the Open EndNote library.
 - Only the imported reference will be showing on screen; from the References pull down menu, choose “Show All” Now all references will be seen in the library window.

PubMed (1)

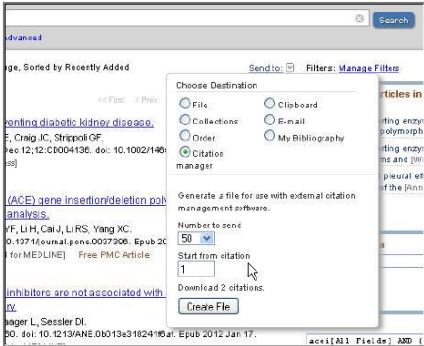
- Exporting citations from PubMed simplified.
- Citations can be chosen individually or results can be exported in groups of from 5 to 200.
- Use the “Send to:” pull down and choose Citation manager.



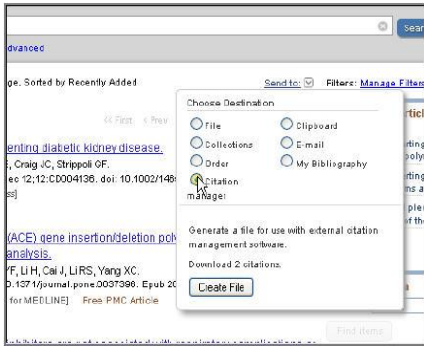
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PubMed (2)

No Citations chosen



Citations chosen



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PubMed (3)

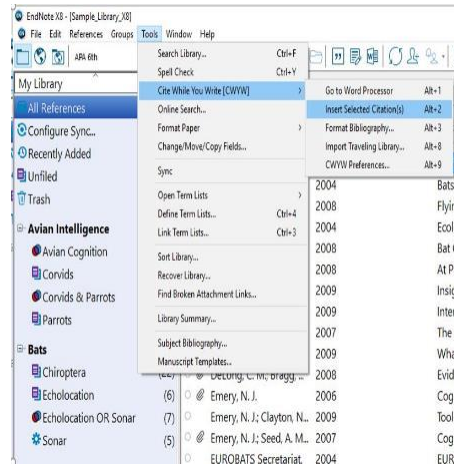
- Click **Create File:** on the lower right of screen.
- The file created is called citations.nbib
- Windows will pop open an “Open With” dialog box.
- Look for “ResearchSoft” “Direct Export Helper (default)” or browse to C:/ Program Files/ EndNote X8 and chose EndNote X8 and the export/import should begin.

Important NOTE: The Safari browser does NOT work well. Mozilla FireFox is optimized for this procedure. Chrome can also be used.

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Cite While You Write (CWYW)

- Cite While You Write (CWYW) is the EndNote component reference from the EndNote library directly into Word docs.
- Cite While You Write (CWYW) can be used from within EndNote or from within Word.
- From EndNote choose the Tools pull down menu and Cite While You Write (CWYW).
- Depending on the version of MS Word choose the Tools pull down menu or the EndNote tab.



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Cite While You Write (CWYW) (2)

The reference as it will appear in the text using the output style for the journal *Neuroscience* (Porter, 2009)

Below is the reference as it will appear in the reference list or bibliography for the journal *Neuroscience*.

Porter, J. I. (2009). Is Art Modern? Kristeller's 'Modern System of the Arts' Reconsidered. *British Journal of Aesthetics*, 49(1), 1-24. doi: 10.1093/aesthj/ayn054

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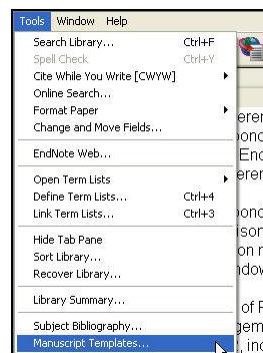
Cite While You Write (CWYW) (3)

- Using (CWYW) will insert the citations from the EndNote library into the manuscript or document.
- An in-text citation will be placed where the cursor is located.
- A bibliography will be generated at the end of the document.
- Tip: Never try to use more than one EndNote Library to insert references into a document, consolidate references into one library before using (CWYW).

Manuscript Templates

191 Manuscript templates are available within EndNote to set up a paper in MS Word.

From the EndNote “Tools” pull down menu choose “Manuscript templates.”



Follow up and help.

- The Information desk 973.972.4358
- A copy of the “Getting Started Guide” is on your hard drive in PDF, C:\Program Files (x86)\EndNote X8
- EndNote.com

The University Libraries EndNote Users Blog

- Answers to frequently asked questions are regularly posted to the Blog.
- <https://rutgersendnote.wordpress.com/>
- Tutorials and other links are also posted on the University Libraries website.
<https://www.libraries.rutgers.edu/endnote>

Additional Resources

- Getting Started Guide.
- The full EndNote Help manual is available through the Help pull-down menu.
- EndNote Help can be accessed from the EndNote folder in the Programs Files folder as a PDF, it is indexed by subject and is also searchable by keyword.

Thank You !

