Introduction to EndNote

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Facilitator

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Agenda

● Getting started
● Capturing information
● Managing citations
● Working in Word
● Sharing with others
● Troubleshooting and questions
Why use a citation management tool?

Collect references from different sources

Organize your database (annotate, rate, tag)

Cite and generate bibliographies

Share references and collaborate with colleagues
Different versions of EndNote

### Comparison: EndNote Basic // EndNote Basic via Web of Science // EndNote Desktop

<table>
<thead>
<tr>
<th></th>
<th>EndNote Basic</th>
<th>EndNote Basic via Web of Science</th>
<th>EndNote Desktop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost</td>
<td>Free</td>
<td>Free, for UBC students, staff, and faculty</td>
<td>$249.95 + some discounts for students</td>
</tr>
<tr>
<td>Output styles</td>
<td>21</td>
<td>6000+</td>
<td>6000+</td>
</tr>
<tr>
<td>Reference storage</td>
<td>50,000</td>
<td>50,000</td>
<td>Unlimited</td>
</tr>
<tr>
<td>File attachment storage</td>
<td>2GB</td>
<td>2GB</td>
<td>Unlimited</td>
</tr>
<tr>
<td>Web of Science data and links, including Times Cited counts</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Full library sharing</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Private group sharing</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Direct export from databases</td>
<td>9</td>
<td>9</td>
<td>500+</td>
</tr>
<tr>
<td>Import PDFs and data from computer</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Annotate and highlight PDFs in application</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Search PDF text, notes and annotations</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Find full text</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Recently added list</td>
<td>No</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**This tutorial is focused on EndNote Basic via Web of Science**
Getting Started
Creating and signing into your account

To create an account with UBC, it’s best to go through Web of Science, using UBC Library’s “Indexes and Databases” tab.
Installing plug-ins

**Cite While You Write:** Microsoft Word plug-in, used to insert in-text citations and bibliographies

**Capture Reference:** A button you can install in your Bookmarks or Favorites bar in your browser, used to capture reference information from PDFs and database records. Find both under Downloads in the EndNote top menu bar.
Capturing information
Capture citations from Google Scholar

Option 1 - You can use the **Capture Reference** plug-in

Option 2 - **Export**: once you have configured Google Scholar to send references to EndNote, you will be able to select Import into EndNote.

*Instructions for exporting*: Go to the Google Scholar homepage and click **Settings** in the upper left-hand corner. Under **Bibliography Manager**, select the option **Show links to import citations into** and choose **EndNote** in the drop down box. Click on the **Save** button.
Capture citations from Google Scholar

When you return to your Google Scholar results page, you should see an Import Into EndNote link underneath each record, which will generate the citation file download.
Capture citations from Google Scholar

Click Import into EndNote and save the file.
Capture citations from Google Scholar

In EndNote, select Collect from the toolbar. Then Import References. Select the file that you have saved to your computer. Under Import Option, select “EndNote Import”. Under To, select whichever folder you prefer (or simply choose “Unfiled”). Select Import.
Capture citations from UBC Library website

Option 1: You can use the **Capture Reference** plug-in.

Option 2: **Export.** Select the **More Actions** option from an article record. Choose **Export to → EndNote**, and the citation will download as an .ris file.
Capture citations from UBC Library website

*Note: when you go to import the reference into EndNote, it will only import if the correct Import Option is selected. “Citation” will work in this instance.
Capture citations from PubMed

Option 1: You can use the **Capture Reference** plug-in.

Option 2: **Export.** References can be exported directly from records from the search results page, and then imported into EndNote.

*Instructions for exporting:* Select the files you are interested in. Then select **Send to → Citation Manager.** This will prompt you to save the .nibib file. In EndNote, follow the same procedure to import your reference (see photos on next slides).
Capture citations from PubMed

Search results
Items: 1 to 20 of 7875  Selected: 2

   PMID: 30245724  Free Article
   Similar articles

2. Biochemical and hematological changes among anemic and non-anemic pregnant women attending antenatal clinic at the Bolgatanga regional hospital, Ghana.
   PMID: 30037895  Free PMC Article
   Similar articles
Capture citations from PubMed

Note: You will want to select “PubMed (NLM)” under Import Option.
Capture citations from Web of Science

Direct Export:
References can be exported from the main search results page by selecting articles and clicking Add to Marked List.
Capture citations from Web of Science

From within the Marked List, select output options and click Save to EndNote Online. The citations will then populate in your References in EndNote.
Manually create a citation

Sometimes, you’ll come across formats that are unique to cite: videos, audio recordings, tweets...

You can manually fill in the information you want to appear in your bibliography.

*Instructions for manual creation of citation*: Create a new reference by selecting Collect → New Reference. Select a Reference Type from the drop-down menu for appropriate fields. Fill in information for author, year, title, etc., and click Save.
Managing citations
Importing and organizing citations into groups

By default, EndNote places your references into Unfiled group. Happily, you can create your own groups in EndNote, which allow you to organize your references into subsets.

Instructions for creating groups:
Select the articles you would like to go in a new group. From the dropdown menu, you can select New Group. Label your new group. The selected files will then appear in that group. (For example, please see photo on next slide).
Importing and organizing citations into groups
Importing and organizing citations into groups

**Note:** You can place a reference into multiple groups. To see which groups a reference is in, click the folder icon below the reference.
Importing and organization citations into groups

To manage your groups:
Select Organize → Manage My Groups. Here, you can press New group to create a new group. You can also rename or delete a group.
Deduplication

Select Organize → Find Duplicates to check library for duplicates. One copy of each duplicated reference will already be selected.

To remove the selected duplicates, click the Delete button.

**Note:** EndNote identifies based on Author, Year, Title, and Reference Type fields.
Editing citations

To edit an existing citation, enter its full record from the My References page.

Click on any of the fields to edit -- they will all open up into a full text-editing box. In the photo to the left, the author field is being edited.
Removing citation from group and deleting

If you’d like to remove a citation from a group, but not delete it from your EndNote account:

Navigate into My Groups and select the reference in question.
Select Remove from Group if you’d like to remove the reference from a group, but keep it within your general EndNote library. (See photo in next slide).
Select Delete if you’d like to delete the reference from your entire EndNote library.
You can always bring it back from the Trash by selecting it and adding to a different group!
# Removing citation from group and deleting

## Example Group

<table>
<thead>
<tr>
<th>Author</th>
<th>Year</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gies, S.</td>
<td>2018</td>
<td>Effects of Weekly Iron and Folic Acid Supplements on Malaria Risk in Double-Blind, Randomized Controlled Noninferiority Trial Journal of Infectious Diseases Added to Library: 27 Sep 2018 Last Updated: 27 Sep 2018 View in Web of Science Source Record, Related Records, Times Cited</td>
</tr>
</tbody>
</table>
Adding and deleting keywords

Often, a citation will come tagged with existing keywords, suggested by the author or the database. Keywords can be helpful eg. you can search for them within the Quick Search field. However, can also be messy and inconsistent, and in need of standardization. Feel free to edit keywords as you would any other field! (See photo below, in which the keyword field is being edited.)
Notes

You can add notes under the Notes field, near end of record. These notes are searchable through the Quick Search feature.
Attachments

You can also attach files, like PDFs or images, to citations.

Click the paper clip icon under Attachments and select file from your computer.

*Please note: you cannot read or annotate PDFs in EndNote Basic.*
Working in Word
Inserting an in-text citation

Before inserting a citation, make sure you have selected whichever citation style you prefer.

Example of sentence you’d like to cite.
Inserting an in-text citation

To insert a citation, place your cursor after the text you want to cite and then click on the Insert Citations button. From here you search for an author name or word from the article to find the reference. Once you select the correct citation, it will populate an in-text reference and bibliographic reference into your document.
Editing a citation

To insert, remove, or edit citations within an existing in-text citation, click the **Edit & Manage Citations** button. This will display a list of all the citations in the document, with the citation you clicked on already selected.

From this window you can select **Remove** to delete a citation, or click **Insert** to insert another citation within the same delimiters.

*(See photo on next slide for example).*
Editing a citation
Generating a bibliography

Your bibliography will be automatically generated with your citations. To edit, click the small arrow at the bottom of the page, to open the Configure Bibliography box.

From here you can update or change the Format and Layout of your bibliography.

*(See photo on next slide for example).*
Generating a bibliography


Sharing with others
Share collection with email address

To share references with other EndNote users, select Organize → Manage My Groups → Manage Sharing → Start Sharing This Group.
Share collection with email address

When sharing via email you can choose between 2 different types of access:

**Read-Only access:** This allows users to view references, use them in Word documents, or copy them to their own library.

**Read & Write access:** Allows the designated user to add, change, or remove references in the group, in addition to everything Read-Only access allows.

*(See photo on next slide for example).*
Share collection with email address
Known problems with EndNote

While EndNote and other citation management tools are extremely convenient and helpful, it’s important to remember that they’re never 100% correct. Some known issues include:

- Toolbar in Word
- Track Changes
- Field Code Errors
Quick demo of EndNote Desktop

**Tip: For help synching your EndNote online and EndNote desktop, please see these great instructions from Monash University: [https://guides.lib.monash.edu/endnote/online-syncronise-desktop](https://guides.lib.monash.edu/endnote/online-syncronise-desktop) and Michigan State University: [https://libguides.lib.msu.edu/endnote/syncing](https://libguides.lib.msu.edu/endnote/syncing)**
Troubleshooting and questions
Where to get help with EndNote...

- Within your Web of Science EndNote account, there is a “Getting Started” guide.
- UBC EndNote LibGuide: [http://guides.library.ubc.ca/endnote](http://guides.library.ubc.ca/endnote)
- UBC Librarians: [http://directory.library.ubc.ca/subjectlibrarians/](http://directory.library.ubc.ca/subjectlibrarians/)
- This PowerPoint will be posted in the UBC Library subject guide for pediatrics: [http://guides.library.ubc.ca/pediatrics/help](http://guides.library.ubc.ca/pediatrics/help)
- EndNote Online/EndNote Basic help page: [http://clarivate.libguides.com/endnote_training/endnote_online](http://clarivate.libguides.com/endnote_training/endnote_online)