

For information about downloading EndNote and for copies of this handout, go to:
<http://infohost.nmt.edu/~nmtlib/INFO/endnote.html>

Why use EndNote?

Manage Information

- 1) Create your own searchable database of references to articles, books, dissertations, etc.
- 2) Organize your article pdfs and retrieve them easily with EndNote's search function

Assistance with writing process

- 1) Easily insert citations in your paper as you write
 - 2) Format your citations and bibliography in a variety of styles (e.g. IEEE, AIP)
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1. Managing References

References are kept in files called *Libraries*. Each reference in the Library has a unique identification number. To create a Library, choose *New...* under the *File* menu. Name your library and click *Save*.

Creating a new Reference (manual input)

Sample: Contopoulos, G., Harsoula M. (2004). Chaos in the case of two fixed black holes.
Journal of Mathematical Physics, 45(12), 4932-56.

1. Open the library where you want to put the reference and choose *New Reference* from the *References* menu (Ctrl + N)
2. Choose *Reference Type* from the box at the top of the window (e.g., book, journal article)
3. Author names may be entered as either Last, First or First Last. Since each author must have a separate line, press *Enter* after each author.
4. Use the TAB key to move to the next field. Enter each part of the reference in the appropriate field. Do not use any punctuation or italics. EndNote will add this when it creates your bibliography.
5. Close the *New References* window by clicking the X button. The reference is automatically saved. Your reference should now appear in the library window.

Inserting Files or Figures in a Reference (e.g. pdf files)

Each EndNote Reference can contain up to 45 files in the *File Attachment* field, but only one graphic or file attachment in the *Figure* field. With the Reference open for editing, go to the *References* menu and choose *File Attachments* and then *Attach File*, or choose *Figure* and then *Attach Figure*. Click *Choose File* to select the desired file.

When you insert a file, EndNote creates a folder with the same name as your library plus .DATA e.g. chaos.DATA and then copies the file and places it in the .DATA folder. You can also choose to link to the file on your computer with an absolute path.

Note: Another way to link a file to the File Attachments field is to **drag and drop the file** onto the reference in either the Library window or the Reference window.

For more details, look in *Help* index for *Linking Files to Reference* or *Inserting Figures*.

2. Using EndNote with online databases

Import Filters

Import Filters are configured to import data files from a specific database. Because each database has its own way to organize reference data, there needs to be a different filter for each one. EndNote provides hundreds of Import Filters. From the *Edit* menu, select *Import Filters* and then *Open Filter Manager*. To download other filters, go to:

<http://www.endnote.com/support/enfilters.asp>

MAC USERS: the **Direct Export** from databases described below involves an extra step for you. After clicking Export/Save/Download from a database, your references will be sent to your *Downloads* folder. In EndNote, click on *Import* under the *File* menu. Choose the File from your *Downloads* folder and then in the *Import Option* box, choose the correct **Import Filter**. If you do not see the Import Filter required, click on *Other Filters...* to select it. For each database below, these are listed in red.

Exporting references from a database *directly* into EndNote (*Windows*)

Web of Science (aka Science Citation Index or SciSearch) *Import Filter: Web of Science (TS)*

After you have marked your references

- Click *Save to EndNote, RefMan, Procite* button

EndNote will open:

Select a Library for the references to be placed in

When the import is complete, only newly imported references are displayed in the Library window. This is a good time to **check the data** in each reference and add keywords, etc. Double-click on a reference to open it and modify it.

**** To see all of the references in the Library window, choose *Show All References* under the *References* menu.

Compendex (Engineering Index) *Import Filter: Compendex (Ei)*

After you have marked your references

- Click *Download* button
- Select *RIS, EndNote, ProCite, Reference Manager*
- Click *Download* button


EndNote will open:

Select a Library for the references to be placed in

OCLC FIRST SEARCH databases: GeoRef, WorldCat, WilsonSelect Plus, etc.

Import Filter: GeoRefS (OCLC), WorldCat (OCLC), etc.

After you have marked your references:

- Click *Marked Records*
- Click *Export* 
- Choose “Export to” *EndNote*
- Click on *Export* (In some web browsers, a dialog box may open: choose *Open It* and click *OK*)

EndNote will open:


1. Select a Library for the references to be placed in
2. Choose an Import Filter
 - a. Click on *Find by* button
 - b. Choose *OCLC*
 - c. Choose a database (e.g. GeoRefS (OCLC))
 - d. Click *Choose* button

CAUTION: In records from a FirstSearch database, the *Year* (and other information may be in the *Note* field. Copy the information and Paste it into the correct field

EBSCOhost databases: Academic Search Premier, Historical Abstracts, Computers & Applied Sciences Complete, Environment Complete, etc.

Import Filter: Tab delimited

After you have added references to your Folder:

- Click *Folder* icon in upper-right of screen
- Select references you wish to export by clicking in boxes and click on *Export* icon 
- Default setting is *Direct Export to EndNote, ProCite or Reference Manager*
- Click *Save* button

EndNote will open:

Select a Library for the references to be placed in

Gale databases: Academic OneFile, Expanded Academic ASAP, Computer Database, Psychology Collection, etc.

Import Filter: Tab delimited

After you have marked records, click on *Marked Items*:

- In the *Tools* box on the left, click *Citation Tools*
- In the section *Export to third party software*, choose *EndNote* and click *Export*

EndNote will open:

Select a Library for the references to be placed in

Saving references from a database and then importing them into EndNote

STEP 1: Saving references from databases using TEXT (.txt) format

Note: references must be consistently *tagged* with each tag starting on a new line

CSA Materials Research Database

After you have marked your references

- Click on *Save, Print, Email*
- Click *Save* and then save the file as a *Text File* (*.txt)

STEP 2: Importing References into EndNote

The imported references field names **MUST** be in abbreviated or tagged format (e.g., TI instead of Title).

1. Open your Endnote Library.
2. Choose *Import* from the *File* menu or click the *Import* icon on the EndNote tab.
3. Use the *Choose File* button to locate and open the file you want to import. Select the file and click *Open*.
4. From the *Import Option List*, select *Other Filters...* Click on *Find* and choose *CSA*. Select *Materials Science (CSA)* and then click *Choose*
5. Click *Import* to import the file.
6. Reminder: When the import is complete, only newly imported references are displayed in the Library window. This is a good time to check the data in each reference and add keywords, etc. Double-click on a reference to open it and modify it.

3. Writing a paper using EndNote and Microsoft Word

The *Cite While You Write* features allow users of Microsoft Word to cite references and create a paper with properly formatted citations and a bibliography. An EndNote submenu or the EndNote Tab give direct access to your references while writing your paper.

Output Styles

An output style formats your references within the text of a paper and in the bibliography.
e.g. AIP Style Manual, Chemical Reviews, Communications ACM, IEEE, MLA.

EndNote provides over 1,000 Output Styles. From the *Edit* menu, select *Output Styles* and then *Open Style Manager*. To sort by subject (e.g. Engineering), click on the *Find by* button. Click the box next to a Style to select it.

To download other Styles, go to: <http://www.endnote.com/support/enstyles.asp>

Step 1: Create the paper and insert markers for the footnotes/bibliography

1. Open both Microsoft Word and EndNote programs.

2. Type in the text of your paper in Word. When you are ready to cite a source, position the cursor in the text. Go to the *Tools* menu then the *EndNote X2* submenu and select *Go to EndNote* (you can also use the icon on the EndNote tab).
3. In your EndNote library, click on the citation you wish to insert so it is highlighted. Choose *Insert Selected Citation(s)* from the *Cite While You Write* menu (under *Tools*) or click on the *Insert Citation* icon in the EndNote tab. The reference should now be inserted in your paper where you last positioned the cursor, and you should be returned to Word.

Step 2: Format the bibliography

1. After you have finished your paper and have inserted all the citations, you can format your bibliography in a large number of styles. First you need to choose the style format (e.g. MLA, APA) that you want to use.
 - In EndNote choose *Output Styles* from the *Edit* menu.
 - If you do not see the style you want to use, then choose *Open Style Manager*. To sort by subject (e.g. Physics), click on the *Find by* button.
 - Mark the style you wish to use by clicking in the box next to it and then close the EndNote Styles window
2. In Word, choose *Format Bibliography* from the *Tools* menu or the EndNote tab. A dialog box appears prompting you to choose a bibliographic style for your paper. Choose your style and then click *OK*.
You can reformat the same document with different styles as many times as needed.

4. Creating an independent bibliography using EndNote and Microsoft Word

To create an independent bibliography:

1. In EndNote, go to the *Output Style* list on the toolbar and select the necessary style.
2. If you do not see the style you want to use, then choose *Select another Style*. To sort by subject (e.g. Engineering), click on the *Find* button. For an example choose the *J Environmental Eng* style.
3. From the *Edit* menu, select *Select All* to highlight all of the references in your library. If you only want certain references included, highlight them by holding the CTRL key and clicking on the references desired.
4. From the *Edit* menu, select *Copy Formatted*
5. Open Microsoft Word and choose *Paste* under the *Edit* menu.

** *Note:* If you just want a **quick printout**, follow 1-4 above and choose *Print* in EndNote.

5. Searching for References

To quickly search your entire library, use the Quick Search text box on the Main toolbar. If you need a more specific or complicated search, use choose *Search Library* (Ctrl+F) from the *Tools* menu or click the *Search* tab in the lower tab pane. The **Search tab** appears, displaying several empty **search lines** (you can add more if necessary).

6. Customizing the Library Display

From the *Edit* menu, choose *Preferences*. There are several options listed. To change the fields displayed in your library, click on *Display Fields*. To change the sort order of a library, click on the column heading to sort by the field in ascending order. Clicking on the same column heading once again will change the sort to descending.

7. EndNote Online Searching with Connection Files

The Online Search feature allows you to search selected library catalogs (including LIBROS) and selected subject databases (including some FirstSearch databases) from within EndNote. ***EndNote's search feature is not as advanced as the searching options in the databases and library catalogs. Try performing the same search in EndNote and in the database to compare your results. In addition, you cannot limit to NMT when searching LIBROS with a connection file. Use the Connect feature in EndNote with caution.***

Choose Integrated or Online Search Mode

You can download found references directly into an existing EndNote library (with Integrated Mode) or into a temporary library (with Online Search mode). Using a temporary library is helpful if you want to experiment with potential search strategies, or refine a search strategy. You can retrieve batches of references without affecting your permanent library, and then copy only selected references into your permanent library. To switch between these modes, click on the appropriate button in the far-left section of the EndNote toolbar.

A. Searching LIBROS

1. Under the *Edit* menu, choose *Connection Files* and then *Open Connection Manager*
2. Click the *Find* button and choose *Library Catalogs*. Find the catalog called *New Mexico Inst Mining Tech* and click the box . Close the Connection Manager window. *New Mexico Inst Mining Tech* will appear in the left frame of EndNote. This will connect you to LIBROS. REMINDER: You will be searching all 28 libraries that use LIBROS. You cannot limit to NMT.

B. Searching OCLC FirstSearch databases

1. If the database you want to search is not listed under Online Search in the Groups pane, choose *Online Search* from the *Tools* menu and select the desired database (e.g., GeoRef (OCLC). Click *Choose* to initiate the connection. A log-in screen will appear. Do NOT fill in the blanks. Click *OK*. You must be on campus to search the OCLC databases.
2. Run your search on the search screen
3. EndNote will produce a temporary list of references (in Online Search mode).
4. Select any or all of the references (using the CTRL button to highlight selected references) you wish to keep and choose *Copy References to* from under the *References* menu. Choose a library in which to place the references.