

EndNote X

Wouter Gerritsma, Marianne Renkema,

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EndNote X

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Authors

*Wouter Gerritsma
Marianne Renkema*

Editor

Annemie Kersten

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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 X. 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. From version 8 and onward the size of a library is unlimited. A [library name].DATA folder is automatically created for each library, in which settings, term lists, figures, tables and pdfs are stored.

• 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 64K, or approximately 16 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

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 bibliographic 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).

Filters developed for Wageningen UR can be downloaded from <http://library.wur.nl/endnote/> or W:\APPS\EndNote\Distrib\Filters. Store downloaded filters in the folder C:\\Program Files\EndNote X\filters\. For WUR Station users, these filters are included in EndNote.

- **(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 1100 preconfigured styles. You can also create a new style. EndNote styles have the extension .ens (EndNote style).

Styles developed for Wageningen UR can be downloaded from <http://library.wur.nl/endnote/> or W:\APPS\EndNote\Distrib\Styles. Store downloaded styles in the folder C:\\Program Files\EndNote X\Styles\. For WUR Station users, these styles are included in EndNote.

- **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.

A connection file developed for the Wageningen UR library catalogue can be downloaded from <http://library.wur.nl/endnote/> or W:\APPS\EndNote\Distrib\Connections. Store this file in the folder C:\\Program Files\EndNote X\Connections\. The latest version is available since Feb 4, 2008.

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/> or W:\APPS\EndNote\Distrib\. 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 servicedesk.library@wur.nl). You can also ask your [information specialist](#) for assistance.

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 X** and then select the **EndNote program**
3. Or: Use **Windows Explorer** and select the drive and folder where the EndNote program 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, but it is recommended to keep using this screen.

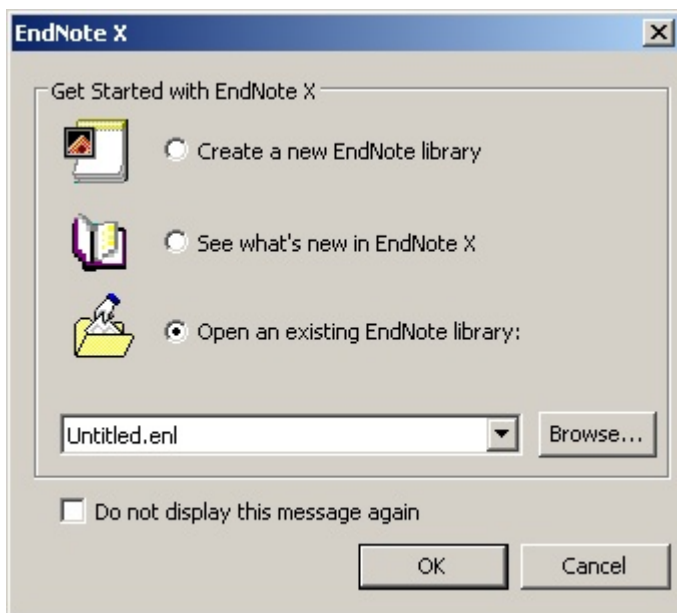


Figure 1. Initial dialogue box

Create a new library:

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

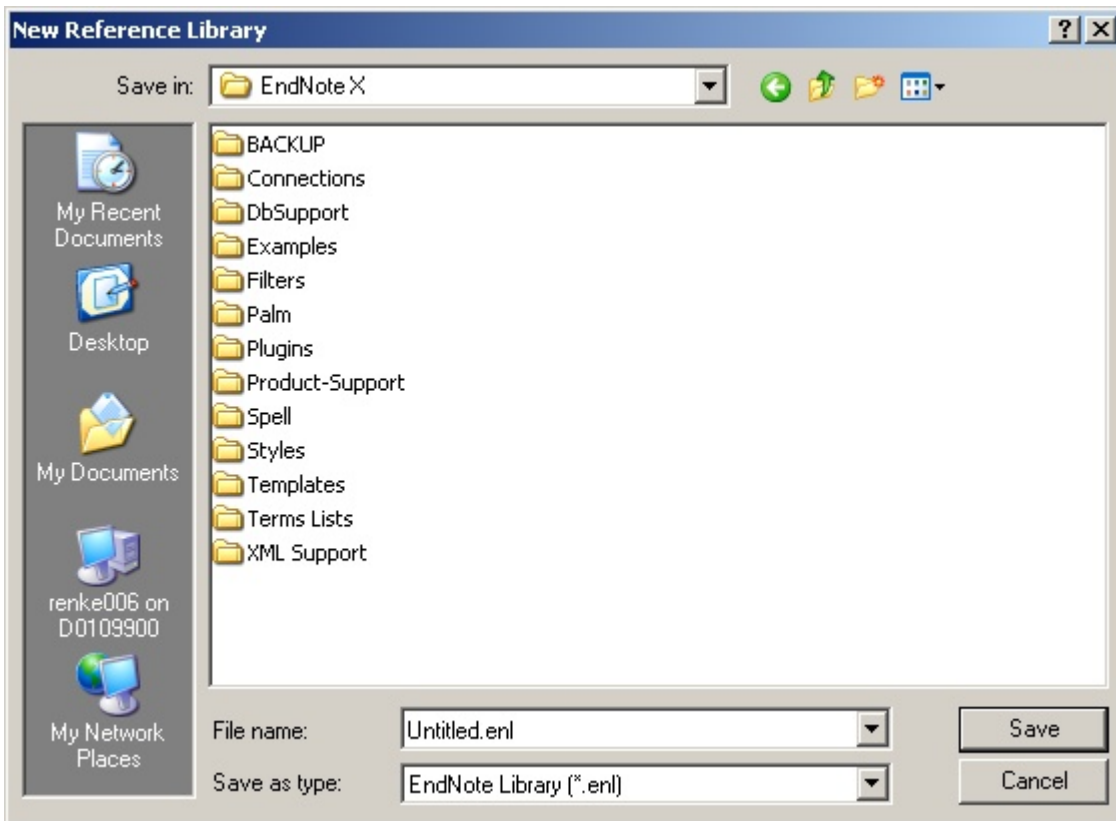


Figure 2. New library dialogue box

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).

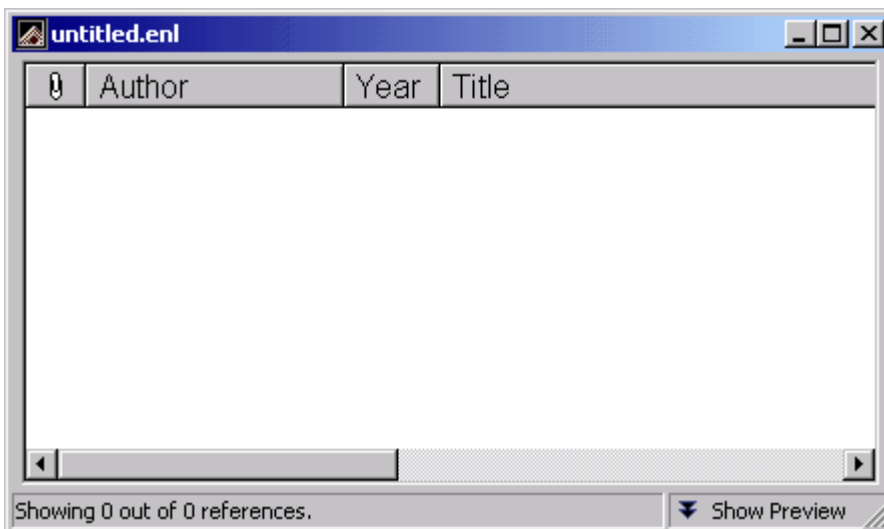


Figure 3. New library window

2.2 Displaying the toolbars

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 library

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](#)^[3]) to select the name of the library
2. Click on the **OK** button.

Alternatively, if the initial dialogue box ([Figure 1](#)^[3]) 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.

You can [enter references manually](#)^[6] by typing the bibliographic information of a reference into the corresponding fields in EndNote. This can be quite a tedious job, if you have many references.

A more efficient way is to look up the references, that you want to have in your EndNote library, in a bibliographic database. In a bibliographic database the bibliographic data (author, title, etc.) of the references are presented in an ordered way and can easily be transferred to EndNote. For the transfer of data between a bibliography and your EndNote library, there are two options: **Export** or **Download+Import**.

The **Export** option is the easiest option, but is not available in all databases. When you choose Export after conducting a search, the EndNote programme will be opened and you will be asked to choose a library in which you want the references to be placed. The references are then automatically transferred. In the background a [filter](#)^[2] is active.

The export option is available in the databases [Web of Science](#)^[8], Current Contents Direct, Scopus and [Wageningen UR library catalogue](#)^[10], all [OvidSP](#)^[11] and [EBSCOhost](#)^[12] databases, ScienceDirect (Elsevier journals) and Highwire Press.

For the **Download+Import** option, first you download or save your results in a text-file after conducting a search in a bibliography. Second, you import the results in your EndNote library with a database specific filter^[2]. This option is available for almost every database. In this manual, the procedure is written down for [OvidSP](#)^[15] databases and [PubMed](#)^[16].

A fourth option is to use **Connect**, which is a function in the EndNote programme. With Connect, you can search in bibliographic databases or library catalogues using the search system of EndNote. It is a convenient option for known references, but we do not recommend this option for "normal" searching in databases, because the search options are limited and searching is very slow.

To add references from a search in [Wageningen UR Library catalogue](#)^[20] by using the connect option, you need the connection file Wageningen Catalogue(WUR).enz. This connection file is not included in EndNote (except for WUR station users), but can be downloaded from <http://library.wur.nl/endnote/> or W:\APPS\EndNote\Distrib\Connections. Store this file in the folder ..\Program Files\EndNote X\Connections\.

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)

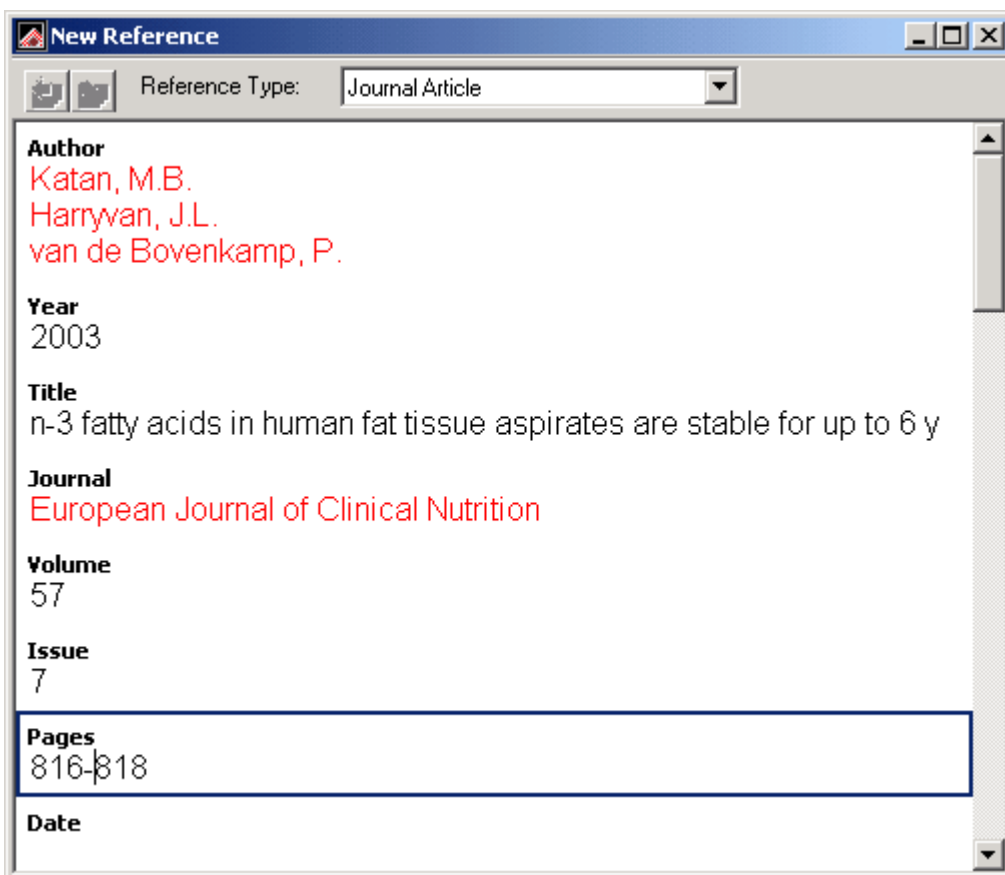


Figure 6. New Reference window

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
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: 2003

- **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>.

Tip: You can make a link using the DOI number of the reference. DOI stands for Digital Object Identifier and is a unique number for each electronic article. Start with <http://dx.doi.org/> and complete the address with the DOI number.

- **Link to pdf**

Optional. Used to link to a file of any format, not necessarily pdf. EndNote X gives you the option to create a link with a relative path or with an absolute path to a file. If you create a link with a relative path, EndNote makes a copy of the file and places this file in the [library name].DATA/PDF folder. A link with an absolute path directs you to the location where you stored the file.

Note: In EndNote 9 a link to pdf is always with an absolute path. This might give compatibility problems when EndNote 9 en X are used alternately.

Detailed information on pdf linking can be found in the official [EndNote manual](#) (Chapter 8).

4. 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, publication year or title ([Figure 9](#) ¹⁰). You can easily change the sequence by clicking on the grey field heading bars.

3.2 Direct export from Web of Science

1. Start your browser and go to the Digital Library (<http://library.wur.nl/>)
2. Select **Web of Science** (see Most Used Resources).
3. Perform a search in Web of Science.
4. Select individual records using the check boxes or check the **All records on page** radio button or indicate a range of records. Then check **Full record**. (Figure 7)
5. Click on the **Save to EndNote, RefMan or other 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.
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).

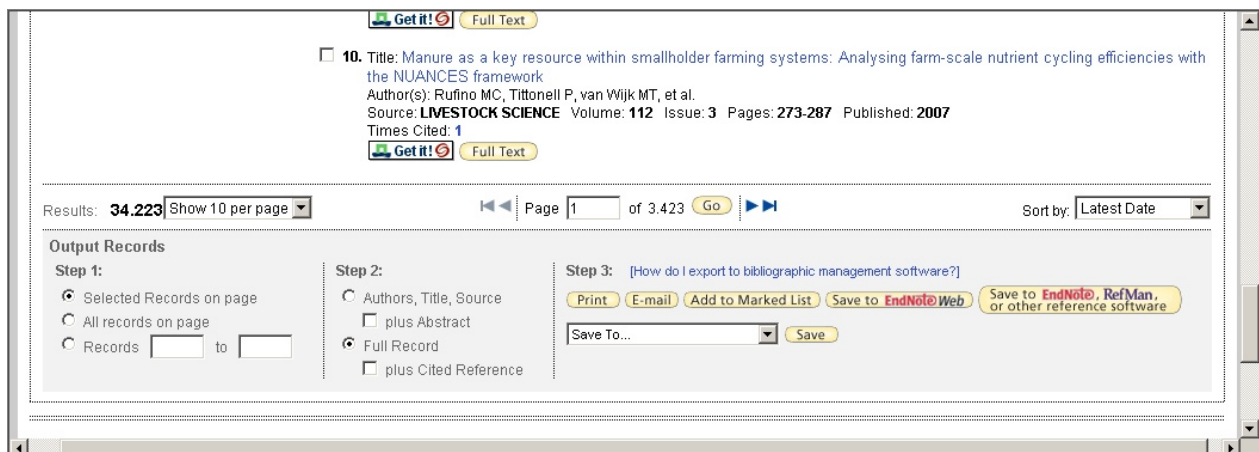


Figure 7. Search results-summary window from Web of Science

7. For more output options, **Add** the selected records to **Marked List**. Then select **Marked List** on the toolbar to go to the Marked List page. On the Marked List page, check boxes for Author, Title, Source and ISSN are selected by default (Figure 8).

ISI Web of KnowledgeSM Take the next step

Sign In | My Endnote Web | My Citation Alerts | My Journal List | My Saved Searches | Log Out | Help

<< Leave Marked List **Web of Science Marked Records**

Display marked list: Web of Science Go

Web of Science Marked Records - 10 Articles

Scroll down to view records Delete This List

Step 1. Select the fields to include in the output. Reset to Defaults

| | | | |
|---|--|--|--|
| <input checked="" type="checkbox"/> Author(s) | <input checked="" type="checkbox"/> Title | <input checked="" type="checkbox"/> Source | <input checked="" type="checkbox"/> abstract* |
| <input type="checkbox"/> language | <input type="checkbox"/> document type | <input checked="" type="checkbox"/> keywords | <input type="checkbox"/> addresses |
| <input type="checkbox"/> cited references* | <input type="checkbox"/> cited reference count | <input type="checkbox"/> times cited | <input type="checkbox"/> publisher information |
| <input checked="" type="checkbox"/> ISSN | <input type="checkbox"/> source abbrev. | <input type="checkbox"/> page count | <input type="checkbox"/> IDS number |
| <input type="checkbox"/> subject category | | | |

*Selecting these items will increase the processing time.

Step 2. Select an option.

| | | |
|--------------|--|---------------------------|
| Field Tagged | Format for Print | E-mail records to: |
| Field Tagged | Save to File | Return e-mail (optional): |
| | Save to EndNote, RefMan, or other reference software | Notes (optional): |
| | Save to My EndNote Web | Plain Text E-mail |

Automatically delete selected records from the Marked List after output is complete.

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

8. Select additional fields to export by checking other boxes, e.g. keywords and abstract .
9. Click on the **Save to EndNote, RefMan or other 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.
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 program 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). 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.
12. Click the **Show Preview** button at the bottom of the Library window. Now the selected reference appears in the preview window
13. 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.

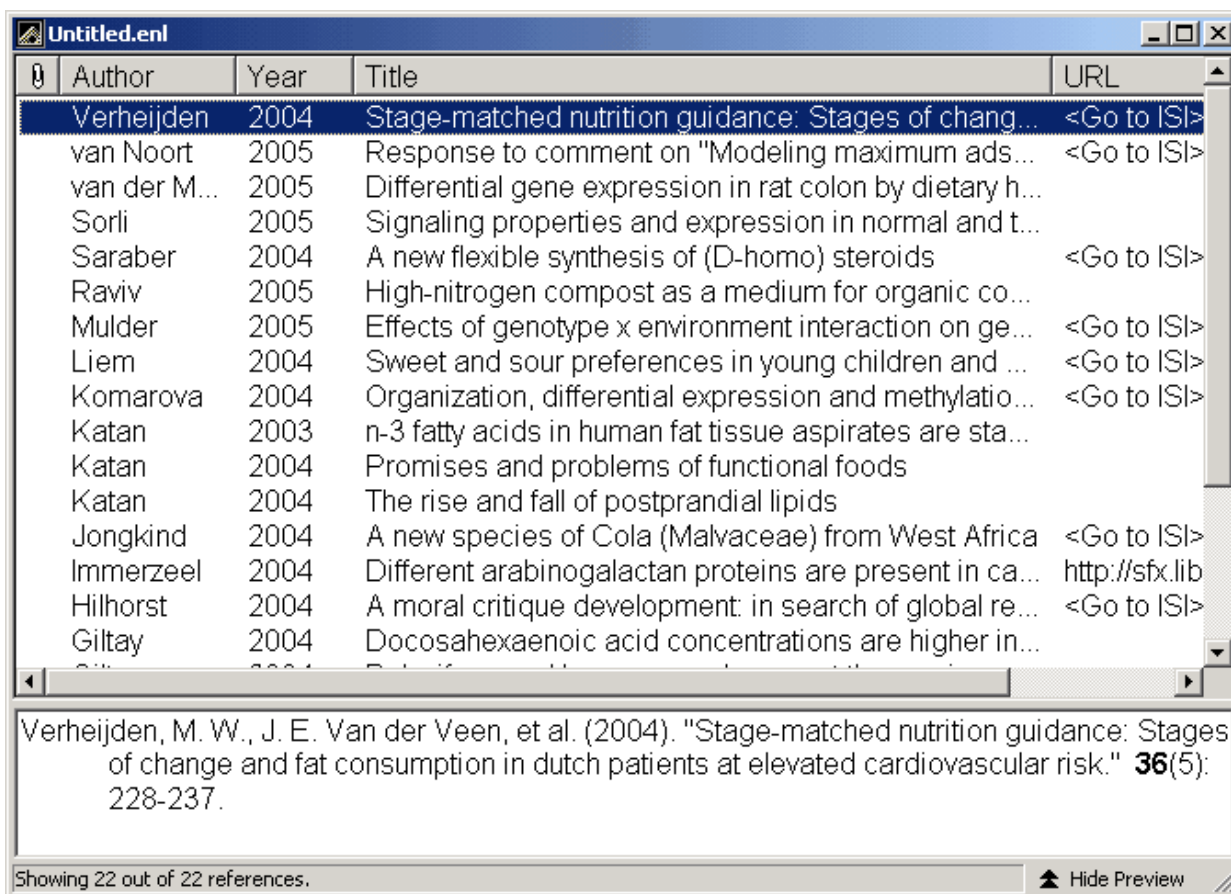


Figure 9. Library window.

3.3 Direct export from Wageningen UR Library Catalogue

1. Search the [Wageningen UR Library catalogue](#) using the basic or advanced search.
2. Click on **export** if you want to transfer all records (with a maximum of 250)
3. A new window opens (Figure 10). Check the **RIS format** radio button and click on **export**.
4. EndNote will be automatically opened. Select a library and **open** it. The catalogue records will be placed in this library.

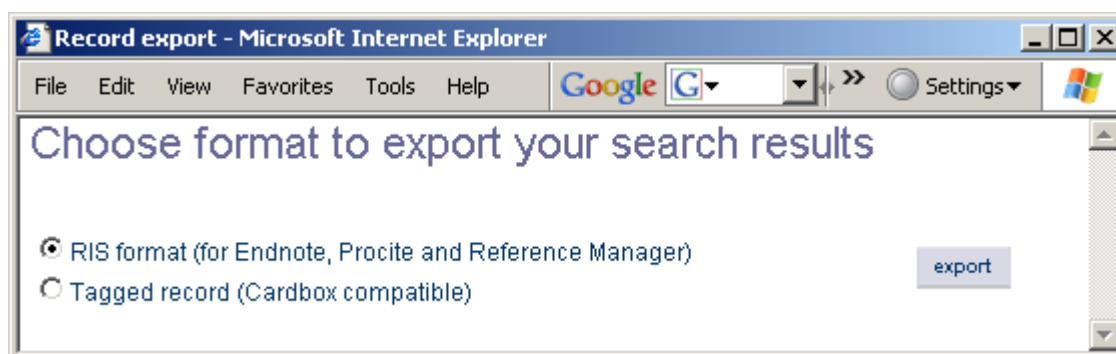


Figure 10. Exporting records window from Wageningen UR Library catalogue

Another option is:

1. Search the [Wageningen UR Library catalogue](#) using the basic or advanced search.

2. Check titles from the results list and go to **Marked list**.
3. A new window opens (Figure 11). Check the **RIS format** radio button and click on **export**.
4. EndNote will be automatically opened. Select a library and **open** it. The catalogue records will be placed in this library.

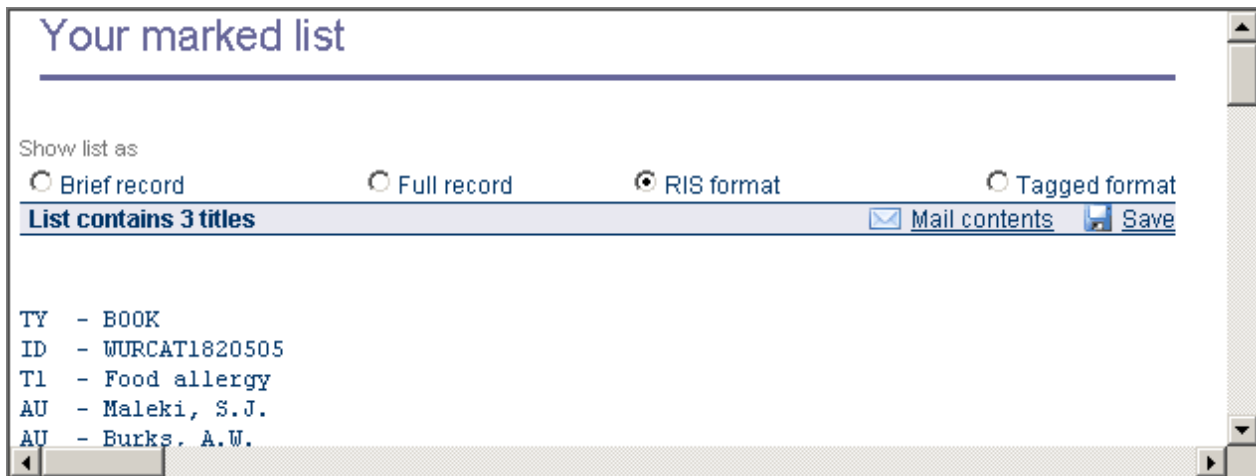


Figure 11. Exporting records window from marked list in Wageningen UR Library catalogue

3.4 Direct export from OvidSP

1. Start your browser (either IE or Firefox).
2. Go to the [Wageningen UR Digital Library](#)
3. Select **OvidSP** (see Most used resources) and choose one or more databases from the list, e.g. Biological Abstracts and/or CAB Abstracts.
4. Perform your search
5. Click on the blue Results Manager bar to expand this section of the window.
6. Complete the window as indicated in Figure 12. Select which results need to be downloaded (**All on this page**, **All in this set**, the **Selected Results** or choose a **Range**), then select **Complete Reference** and **Direct Export**.
7. Click **Save**
8. EndNote will be automatically opened. Select a library and open it. The selected records will be transferred.

Note: In the background a filter is active. This filter (silverplatter.enf) is not available in the EndNote programme, but can be downloaded from <ftp://support.isiresearchsoft.com/pub/pc/filters/SilverPlatter.enf>. Store the filter in C:\Program files\EndNote X\Filters.

Figure 12. Completed download screen from OvidSP

3.5 Direct Export from EBSCOhost

1. Start your browser (either IE or Firefox).
2. Go to the [Wageningen UR Digital Library](#)
3. Select **EBSCOhost** (see Most used resources) and choose one or more databases from the list, e.g. SOCIndex and/or CAB Abstracts.
4. Perform your search

To download a single reference:

5. Click on the title of a reference to see the full citation information (Figure 13).

Figure 13. Part of the full citation window in EBSCOhost


6. Click on the Export to Bibliographic Manager  icon
7. The Export Manager window appears (Figure 14). Choose **Direct Export to EndNote, ProCite, or Reference Manager**.
8. Click **Save**
9. EndNote will be automatically opened. Select a library and open it. The selected records will be transferred.



Figure 14. Completed Export Manager screen in EBSCOhost

Multiple references can be downloaded after they are placed in a results Folder:

10. Select specific references to be added to the folder by clicking on the **Add to folder** links in the results list. Or add all references on this results page by clicking on **Add (1-10)** in the blue bar (Figure 15).



Figure 15. Results list in EBSCOhost with one item in the Folder

11. Go to **Folder view**

12. Select specific or select all references to be downloaded (Figure 16)

13. Click on the Export to Bibliographic Manager  icon

14. The Export Manager window appears (Figure 17). Choose **Direct Export to EndNote, ProCite, or Reference Manager**, and choose whether you want to remove the items from the folder after saving.

15. Click **Save**

16. EndNote will be automatically opened. Select a library and open it. The selected records will be transferred.

Tip: By default 10 results per page are shown. Go to Preferences and change this number into 50.

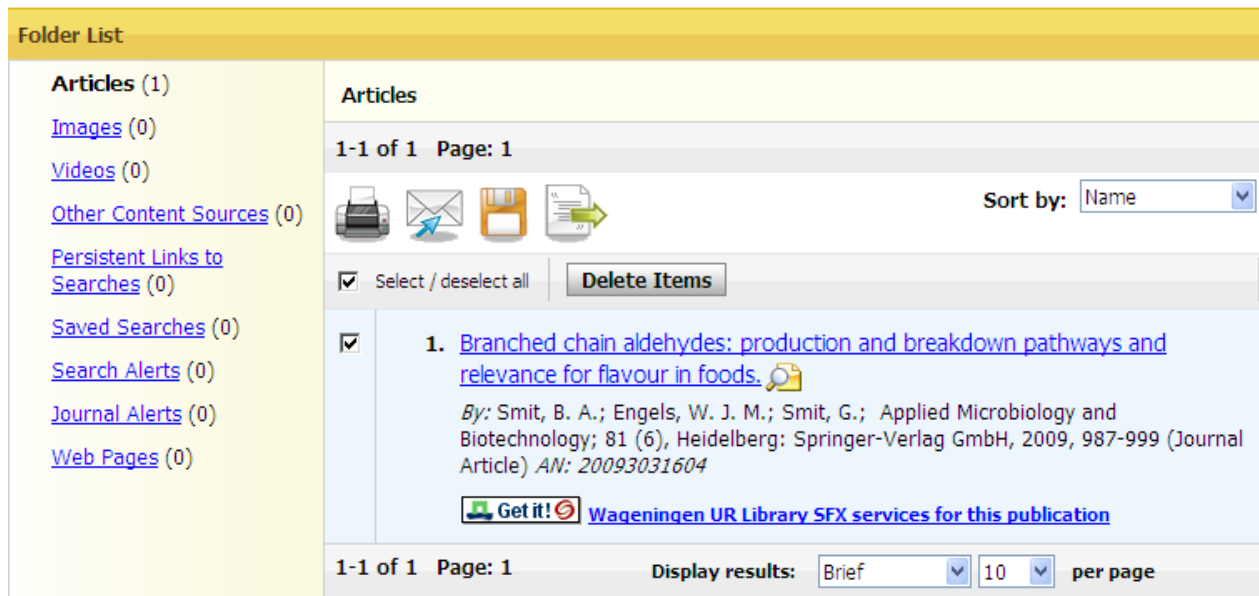


Figure 16. Folder list in EBSCOhost with one item in the Folder

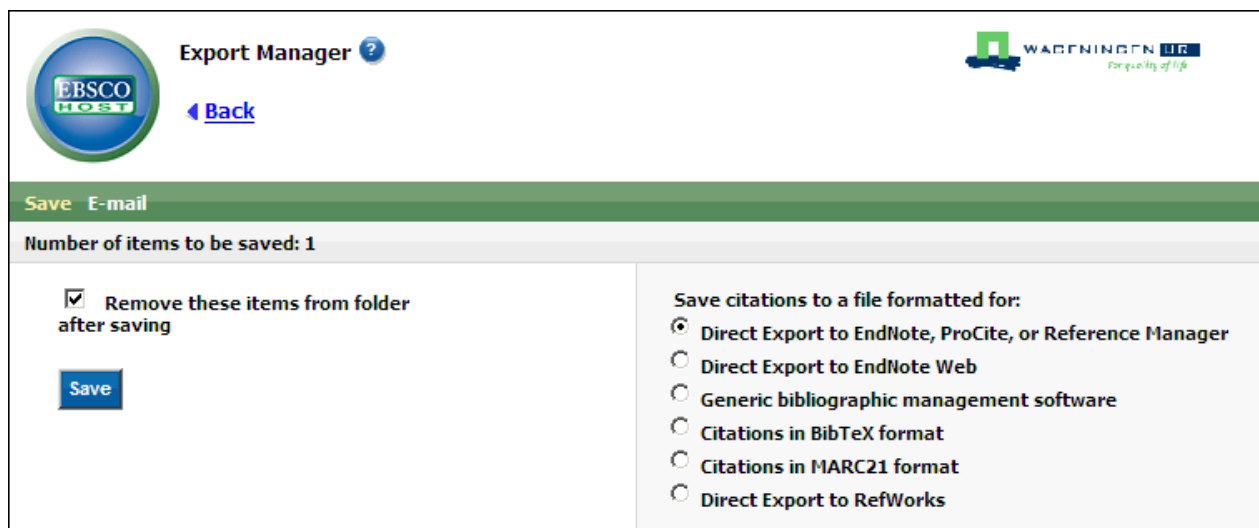


Figure 17. Export Manager in EBSCOhost opened from the Folder

3.6 Download+Import from OvidSP

Download from bibliographies on the OvidSP search platform

- [Create a download from OvidSP](#)¹⁵⁾
- [Import a OvidSP download into a library](#)¹⁶⁾

3.6.1 Create a download from OvidSP

1. Start your browser (either IE or Firefox).
2. Go to the [Wageningen UR Digital Library](#)
3. Select **OvidSP** (see Most used resources) and choose one or more databases from the list, e.g. Biological Abstracts and/or CAB Abstracts.
4. Perform your search
5. Click on the blue Results Manager bar to expand this section of the window.
6. Complete the window as indicated in Figure 18. Select which results need to be downloaded (**All on this page, All in this set**, the **Selected Results** or choose a **Range**), then select **Complete Reference** and **Reprint/Medlars**.
7. Click **Save**
8. Choose **Windows Style Linefeed** and click **Continue>>** (Figure 10)
9. **Save** the file

The screenshot shows the 'Results Manager' interface with the following sections:

- Results:** Radio buttons for 'Selected Results', 'All on this page', and 'All in this set (1-33881)'. Below is an 'and/or Range:' input field and a 'Clear Selected Results' button.
- Fields:** Radio buttons for 'Citation (Title,Author,Source)', 'Citation + Abstract', 'Citation + Abstract + Subject Headings', and 'Complete Reference'. A 'Select Fields' button is below.
- Result Format:** Radio buttons for 'Ovid', 'BRS/Tagged', 'Reprint/Medlars', 'Brief (Titles) Display', and 'Direct Export'. A checked checkbox for 'Include Search History' is at the bottom.
- Actions:** A vertical stack of buttons: 'Display', 'Print Preview', 'Email', and 'Save'.
- Sort Keys:** Two rows for 'Primary' and 'Secondary' sorting, each with a dropdown menu and an 'Ascending' dropdown.

Figure 18. Completed download screen to save results in OvidSP

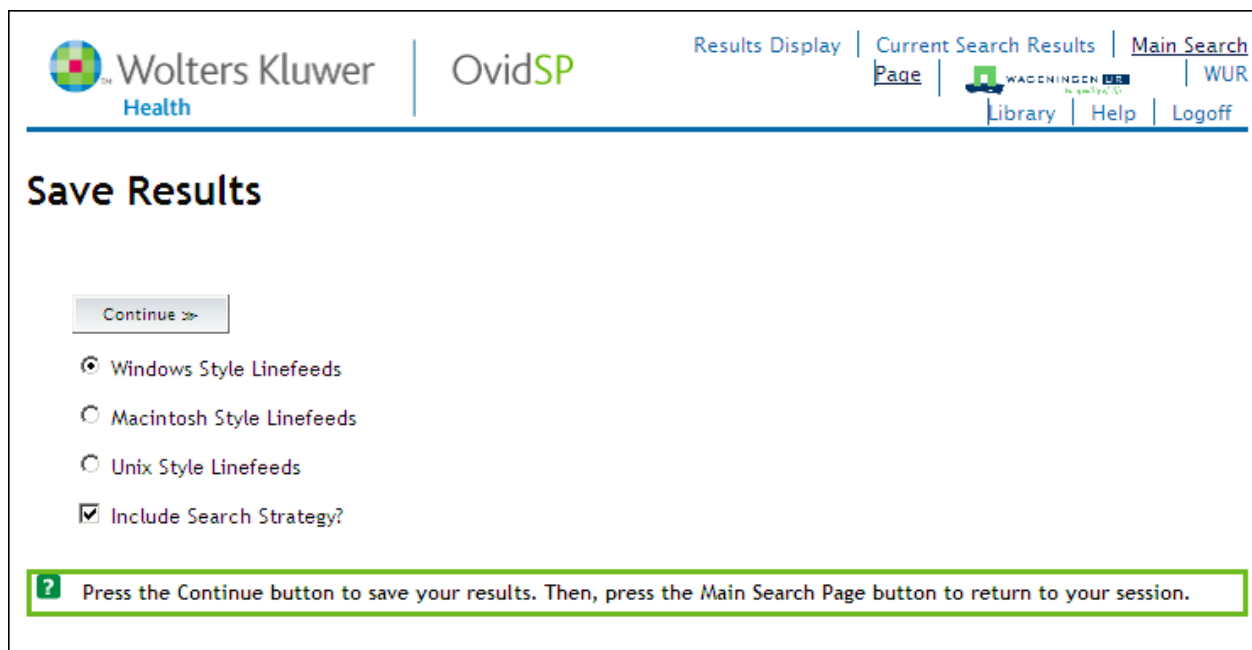


Figure 19. Save results screen in OvidSP

3.6.2 Import an OvidSP download into a library

1. Start EndNote. [Create a new library](#)^[37] or [open](#)^[57] 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 an OvidSP filter with the same name as the database you searched in, e.g. CAB Abstracts(OvidSP_WUR).enf. When you cannot find the appropriate filter in the list, look at the beginning of this chapter for instructions to download filters.
6. Click on the **Choose** button.
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](#)^[107]). 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.
8. Note: If the import filter does not function properly ask your [information specialist](#) for assistance.
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.

3.7 Download+Import from PubMed

Add references to your library with a download from PubMed:

- [Create a download from PubMed](#)^[177]
- [Import a PubMed download into a library](#)^[187]

3.7.1 Create a download from PubMed

1. Start your browser.
2. Go to the [search page of Wageningen UR Digital Library](#)
3. Select **PubMed** from **Databases A-Z**
4. Perform your search.
5. Check references on the search results page and select **MEDLINE** from the **Display** drop-down menu (Figure 20). Only the selected results are shown in this window.
6. Choose **File** from the **Send to** drop-down menu, and click.

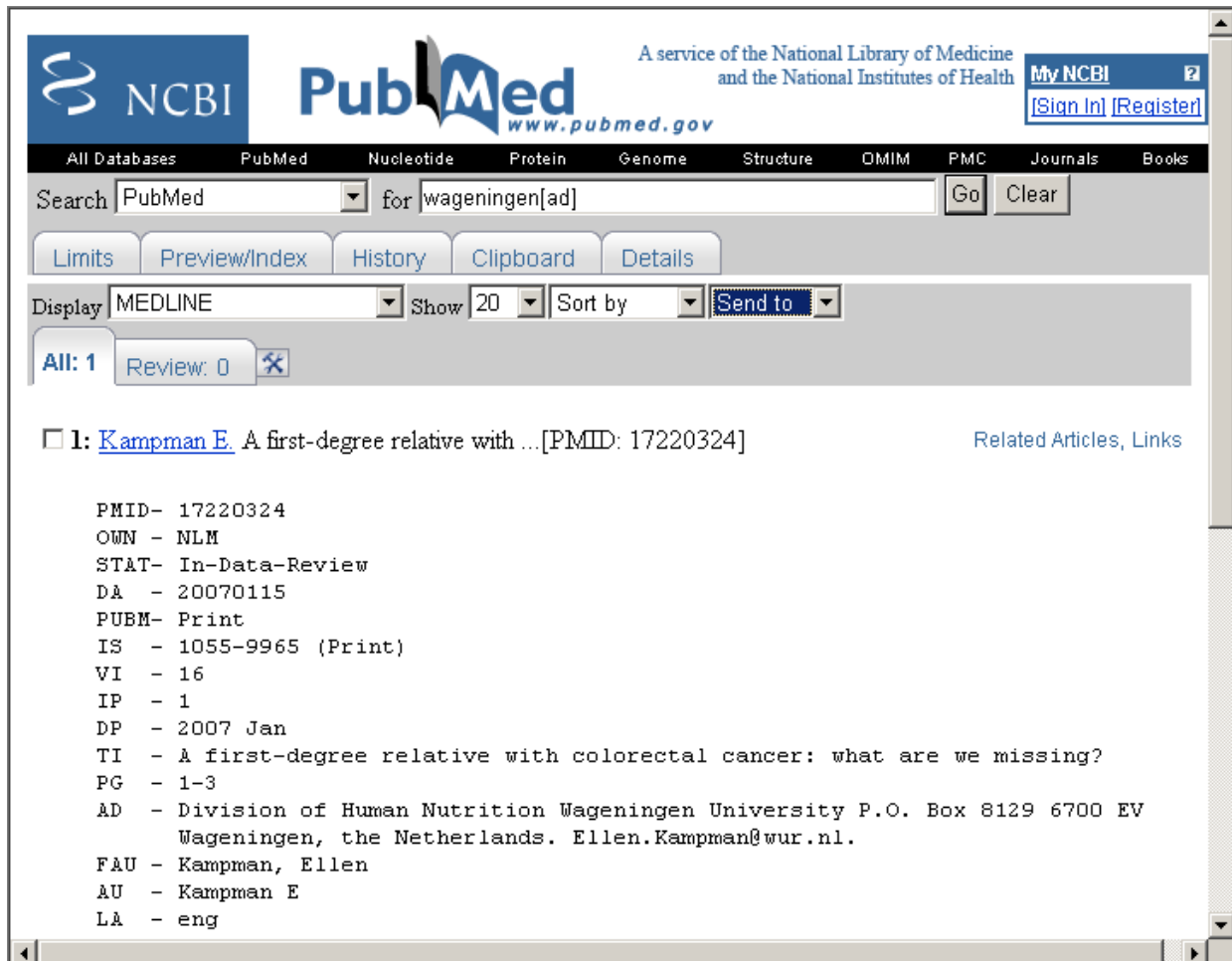


Figure 20. Search results page

7. Select **Save** in the next screen (Figure 21).

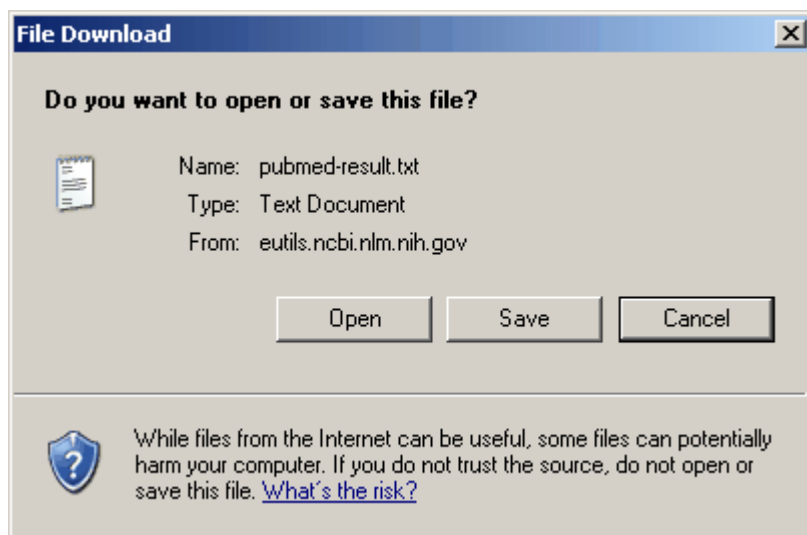


Figure 21. File download screen

8. Select the disk and directory in the **Save in** box and **Save** the file.

3.7.2 Import a PubMed download into a library

1. Start EndNote. [Create a new library](#)^[3] or [open](#)^[5] 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](#)^[10]). 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.
8. Note: If the import filter does not function properly ask your [information specialist](#) for assistance.
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.

3.8 Retrieve references from Wageningen catalogue with a connection file

Retrieving references from Wageningen UR Library catalogue by using a connection file:

- [Make a connection to Wageningen UR Library Catalogue](#)^[19]
- [Search Wageningen UR Library Catalogue](#)^[19]
- [Retrieve references from the catalogue into an EndNote library](#)^[20]

Note: Before you start, make sure that you have the latest version of the connection file Wageningen catalogue (WUR).enz (Feb 4, 2008). This file can be downloaded from W:\APPS\EndNote\Distri\Connections. Store it in the folder C:\Program Files\EndNote X\Connections\.

3.8.1 Make a connection to Wageningen Catalogue

1. Start EndNote. [Create a new library](#) 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 22).

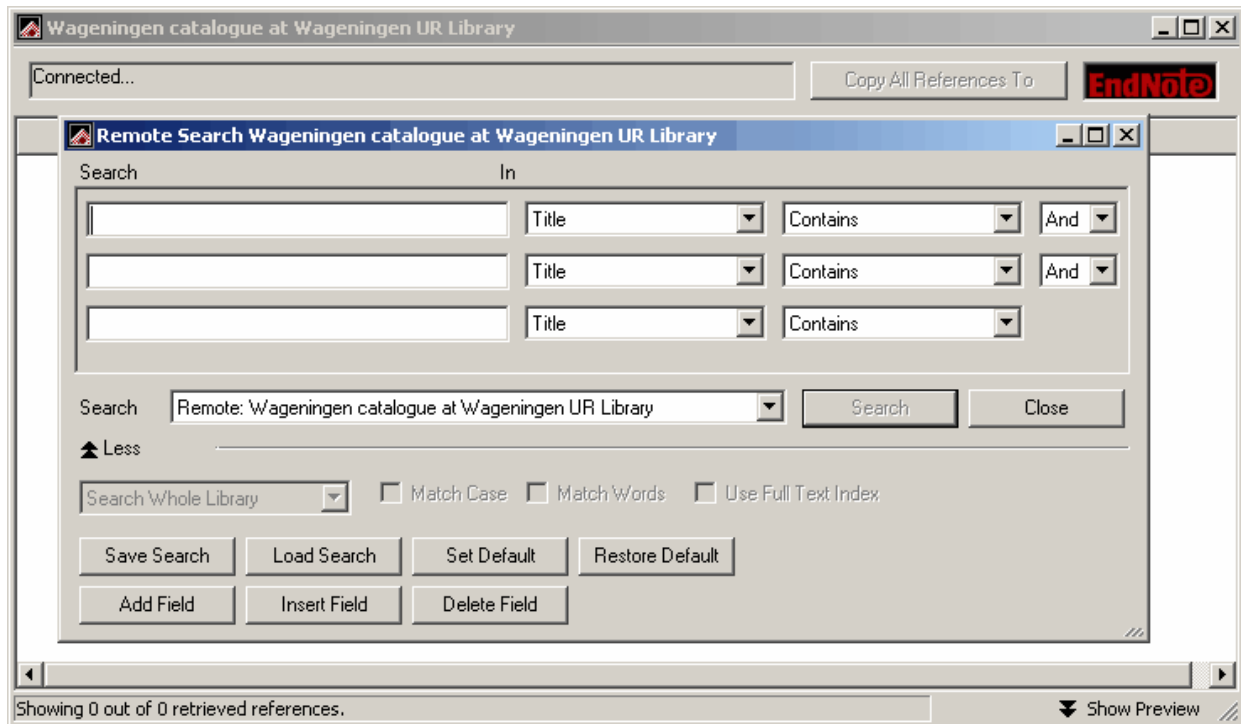


Figure 22. Connection windows that open on selecting a connection file

3.8.2 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 from Altschul, but also from Altschuld. Use family names when searching for authors. Initials are ignored.

1. Enter your search terms in the window with Remote Search Wageningen catalogue at Wageningen UR Library in the title bar (Figure 23)
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 24).
4. Click on the **OK** button

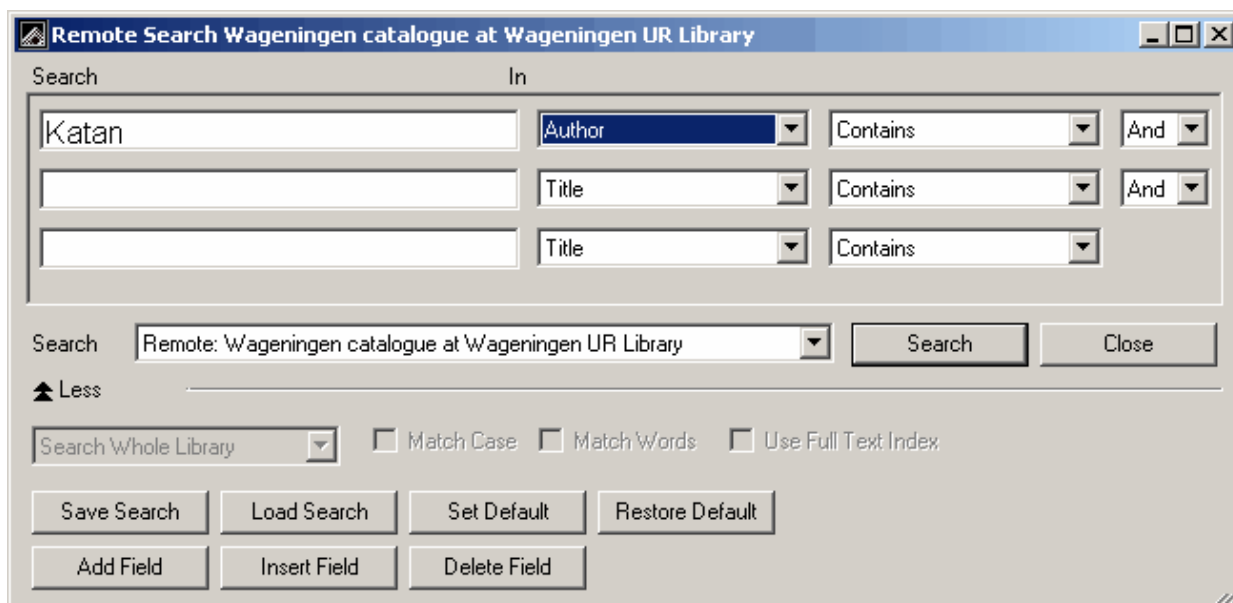


Figure 23. Search window for a remote search

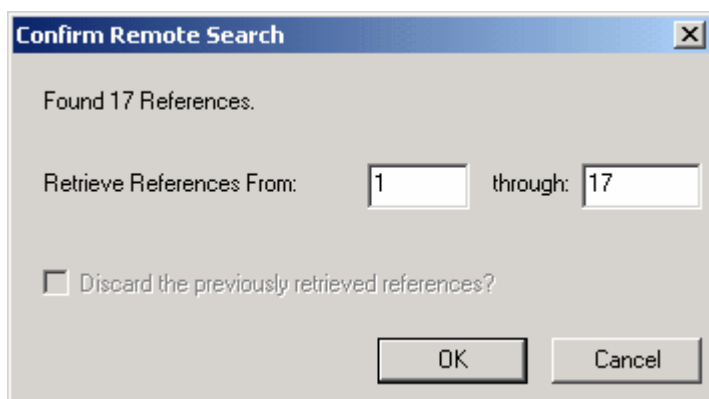


Figure 24. Confirm remote search window

3.8.3 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 25). 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.

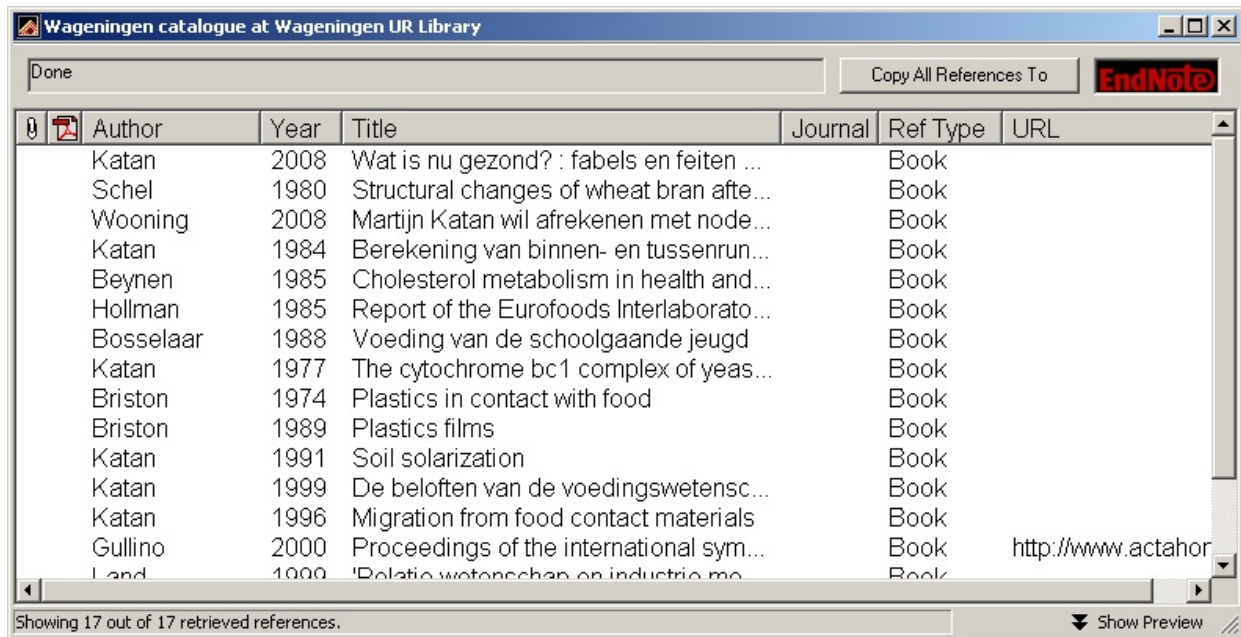


Figure 25. Connection window

- 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.

4 Manage libraries

Managing libraries:

- [Transfer references between libraries](#) ^[21]
- [Deduplicate](#) ^[24]
- [Search](#) ^[22]
- [Browse](#) ^[22]
- [Specific searches](#) ^[22]

4.1 Transfer references between libraries

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

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

4.2 Search

In an open library you can search specific references:

- [Browse](#) ²²
- [Specific searches](#) ²²

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 alphabetically.

To change the fields displayed in the library window:

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 eight 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. Detailed information on specific searches can be found in the official EndNote manual (Chapter 8). In this topic the library included with EndNote ...\\Program Files\\EndNote X\\Examples\\Paleo.enl will be used.

To perform searches:

1. Open the library\\Program Files\\EndNote X\\Examples\\Paleo.enl
2. Select **Search References...** (Ctrl+F) from the **References** menu. The Search window appears (Figure 26).
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

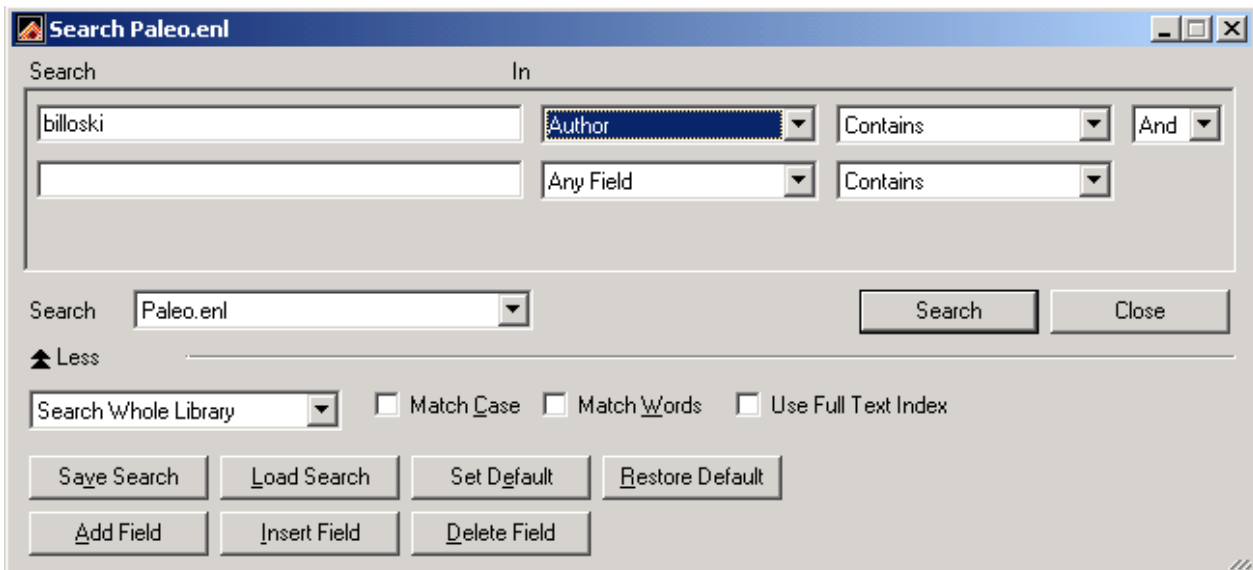


Figure 26. Search window with billoski in the author field

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. 146 Journal articles are included in the library ..\Program Files\EndNote X\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 27)

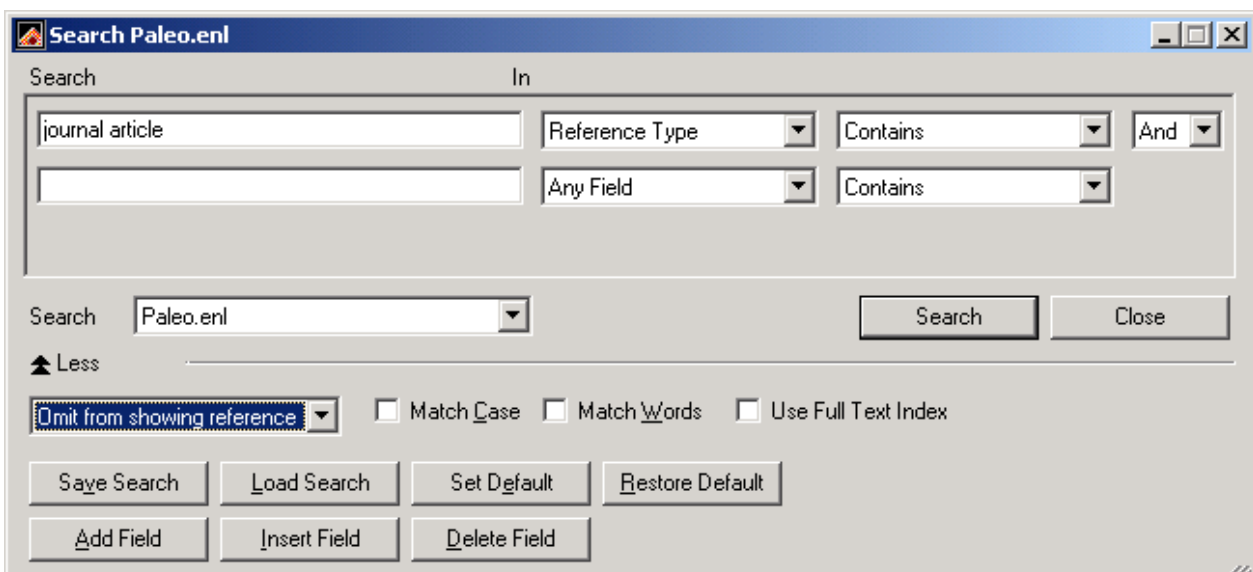


Figure 27. Search window with Omit from showing references selected

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 26).
11. Increase the number of search boxes by clicking the **Add Field** button (Figure 28)
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 28.

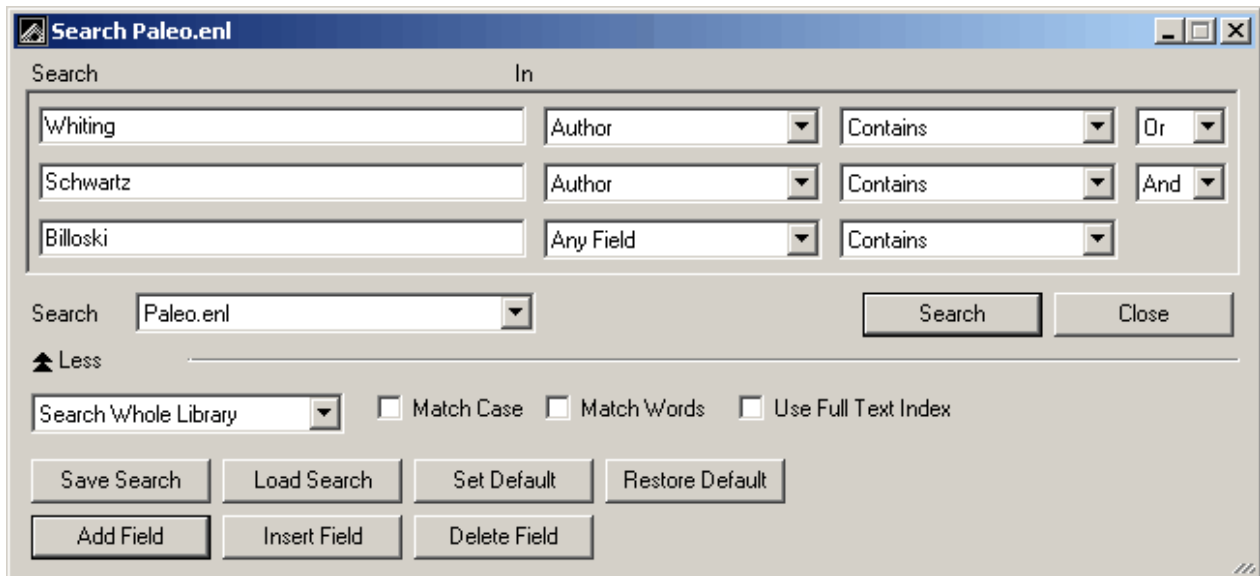


Figure 28. Search window with one search field added

4.3 De-duplicate

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:' (Figure 29)

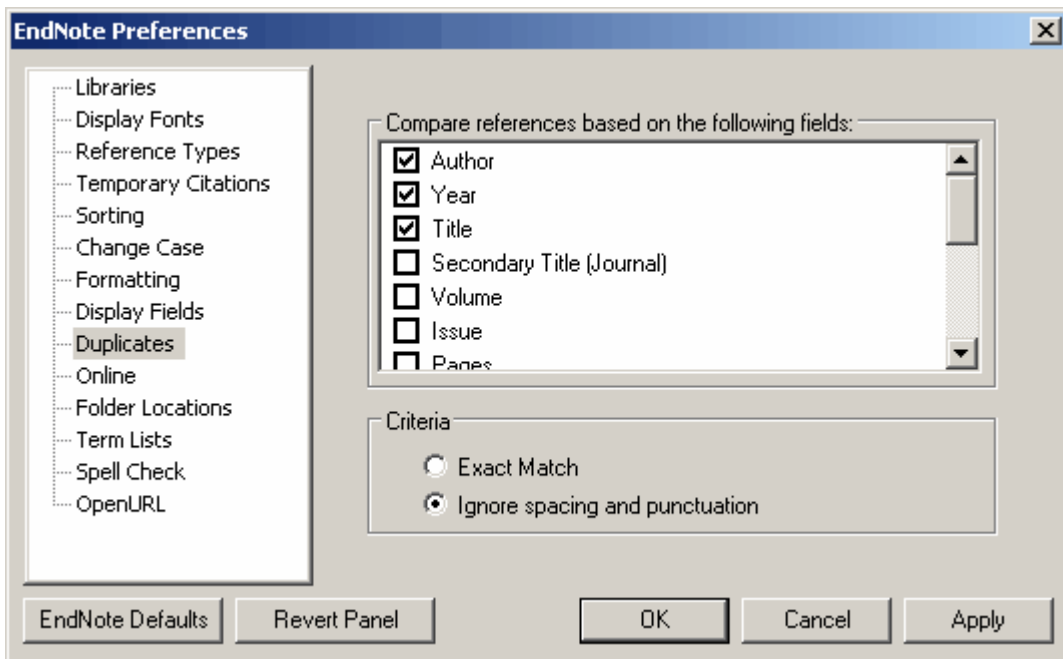


Figure 29. EndNote preferences window with Duplicates template

3. Override some of the Endnote default settings. It is recommended to de-duplicate by Author, Year, Title 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 de-duplication 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+M) 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 30)
6. Select an Output Style (journal style) by checking the box to the left of the style. For users that do not have WUR Station, some extra 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 X\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.

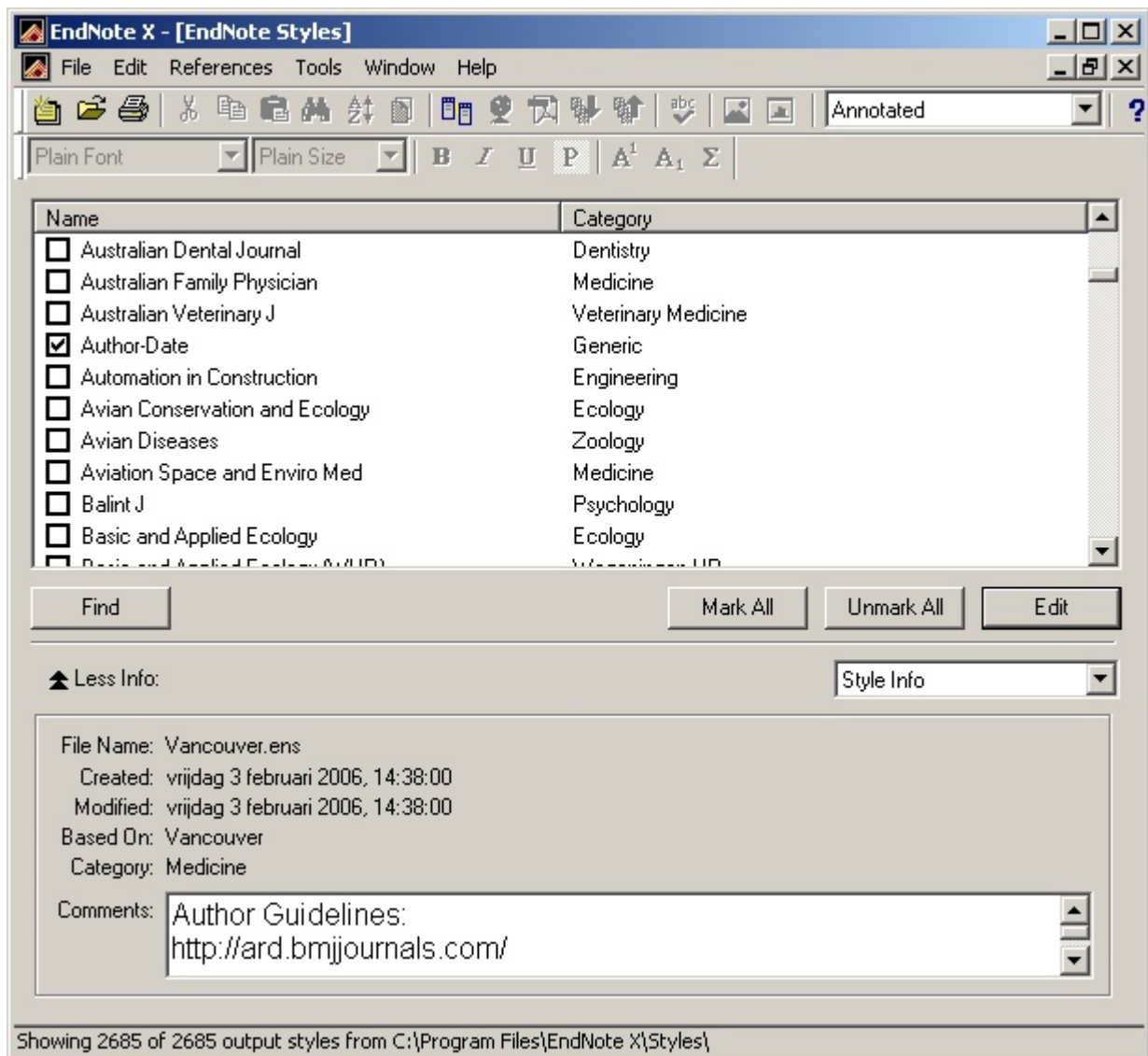


Figure 30. Select styles window

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](#).^[27]
- [Format reference lists according to another journal style](#).^[27]

5.1 Include references in a document

On successful installation of EndNote on your computer, MS Word shows the EndNote toolbar (Figure 31). You can place the EndNote toolbar between the other toolbars. If the EndNote toolbar is not visible in Word, consult our [FAQ](#).



Figure 31. 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 EndNote 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 (Ctrl+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](#) ²⁴ from the **With output Styles** drop-down menu. Or select another style by using the **Browse** button (Figure 32).
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.

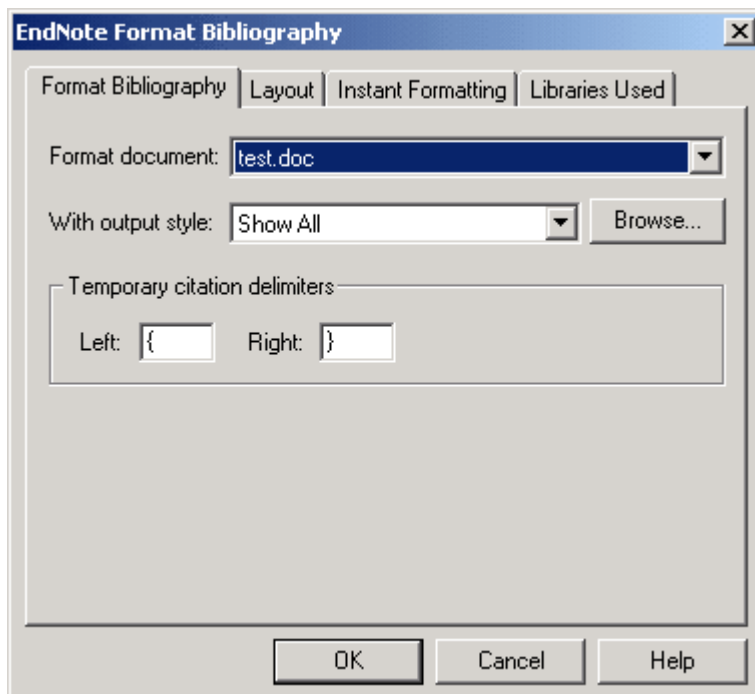


Figure 32. Format bibliography window in Word

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