

EndNote X4

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EndNote X4 Quick Start

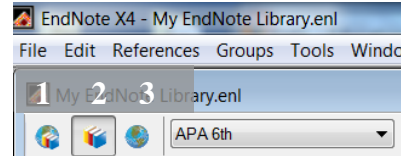
Open an EndNote Library

1. **Start > Programs > EndNote > EndNote Program**
2. File > New OR select *Create a new EndNote Library* > OK
3. Accept default name or name the library and Save
4. EndNote automatically saves an accompanying DATA folder for storage of object and picture files. The .enl library and DATA folder function together.

3 Modes

Before doing your online search to add references to your EndNote Library, select Integrated or Online Mode.

1. Integrated Library and Online Search Mode
2. Local Library Mode
3. Online Search Mode (Temporary Library)



NOTE: The **Online Search Mode** creates a temporary Online Mode Library which allows you to review the citations before you select and copy them into your EndNote Library. Return to your Library by clicking on Local Library Mode; this allows you to view all the references currently in your Library. (Recommended!)

Methods for Getting References into the EndNote Library

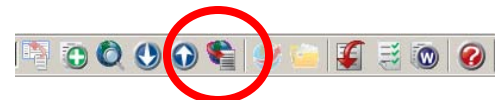
1. **Online Search > PubMed (NLM)**
Fill in the online search template in the Tabs pane; than press the **Search** button.
Once you **confirm online search**, references are available in your EndNote Library.
2. **Import**
Perform search in PubMed
Save references in a tagged format (MEDLINE display format) and as a text file.
Return to EndNote and use **File >Import**; fill in the dialog window and be sure to select the correct filter (for example PubMed (NLM))
3. **Export**
Perform search in the database (this works well with EBSCOhost databases)
Select and save needed citations; **Export** citations; you may be asked to select the library into which you want the citations to go.
4. **Manual Input**
Use only if you do not have access to the citation in an online database.
Select the correct **Reference Type**; fill in the appropriate fields and **Save**.

Groups

1. Use **My Groups** to sort references by subject topic, project, author name, etc.
2. Right click on **My Groups** > select **Create Group** > type name of group
3. Select citations in the **Reference List** pane > right click and select **Add References To > My Groups** > then the **specific group**
4. Right click on the group name and select **Create Group Set** to add sub-group(s)
5. Group names are sorted alphabetically
6. A reference can be placed in more than one group
7. A reference deleted from a group remains in the Library; a reference deleted from the Library is removed from a Group and is no longer available for use

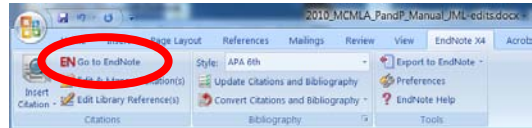
Find Full Text

To attach the full text article to the EndNote record select references added to the Library and click on the **Find Full Text** icon. Authenticate with your uNID and continue.



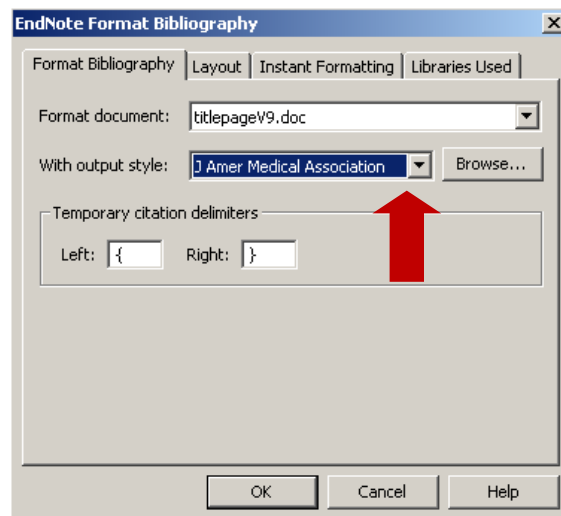
Cite While You Write (works with MSWord)

1. Open **MSWord**; note the EndNote X4 tab in the ribbon
2. Select **Output Style**
 - a. In EndNote go to **Edit > Output Styles > Open Style Manager** {select style with check mark}
 - b. The style then becomes available in the EndNote output styles pull-down menu and in the **Format Bibliography** dialog box in EndNote
3. As you are typing your paper you can **insert** in-text citations and create the bibliography; options for inserting citations from your EndNote Library include:
 - a. In Word, use the **Go to EndNote** link to return to EndNote – select citation; use the **Insert Citation** icon in EndNote to return to the Word document.
 - b. In Word, use the **Insert Citation** pull down menu and select > **Find Citation**; enter *word* to search > select citation > **Insert** button.
 - c. **In EndNote** – highlight the citation and use the Insert Citation icon; the system returns you to your word document, inserts the in-text citation and adds citation to the reference list.



4. **Format Bibliography**
Use the *With output style* pull-down menu to select and change the citation format.

NOTE: Any editing that needs to be done to a citation should be done in the EndNote record. Editing the in-text citation in Word or editing the reference in Word is counter-productive since the next format bibliography command will revert to the citation as it appears in EndNote.



Records entered into EndNote from an online database should be reviewed for accuracy and completeness.

The Find Full Text command is not 100% accurate even if you authenticate.

Online tutorial available at:
[http://library.med.utah.edu/ed/userservices/handouts/-scroll to EndNote](http://library.med.utah.edu/ed/userservices/handouts/-scroll%20to%20EndNote)

JML-7/27/2010
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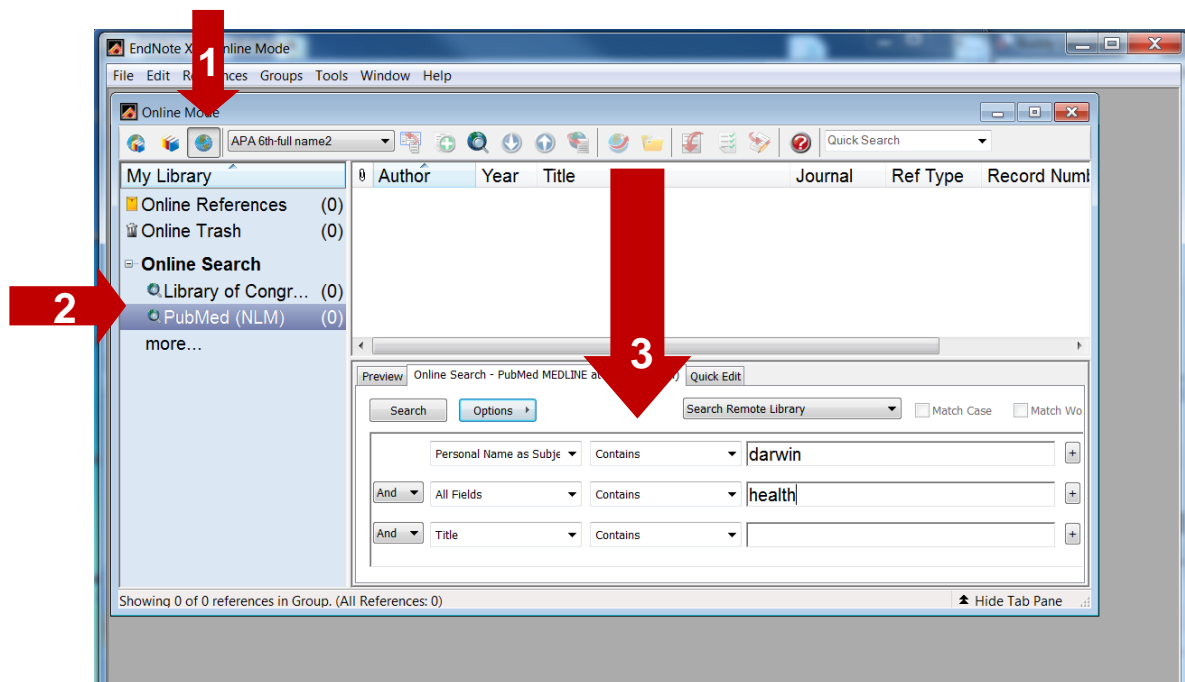
Exercise 1 –Create an EndNote X4 Library, Search PubMed from within EndNote, Create a Group, Find Full Text, Review Records

Create an EndNote Library

- Go to **Start > All Programs > EndNote > EndNote Program**
- The program opens a new library named **My EndNote Library.enl** a corresponding folder named **My EndNote Library.data** is created
- Or go to **File > New > name the library and save to desktop**
- To open a library from within EndNote **File > Open > Open Library**

Search PubMed from within EndNote

1. Select **Online Search Mode**
2. Under Online Search select **PubMed (NLM)**
 - If PubMed is not an option, click on **more . . .** then select **PubMed (NLM)** from the list of databases listed in the **Choose a Connection** window
3. Enter your search terms in the Online Search template

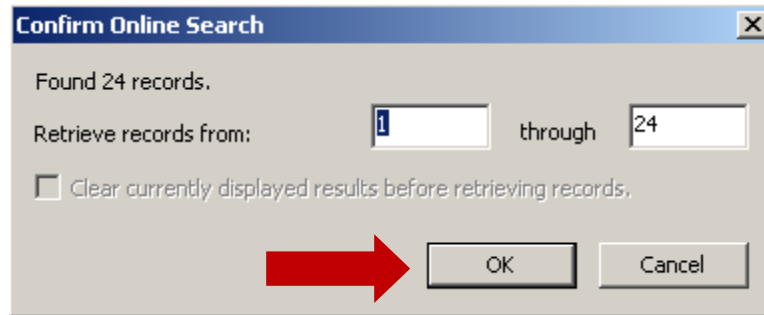


Online Search template

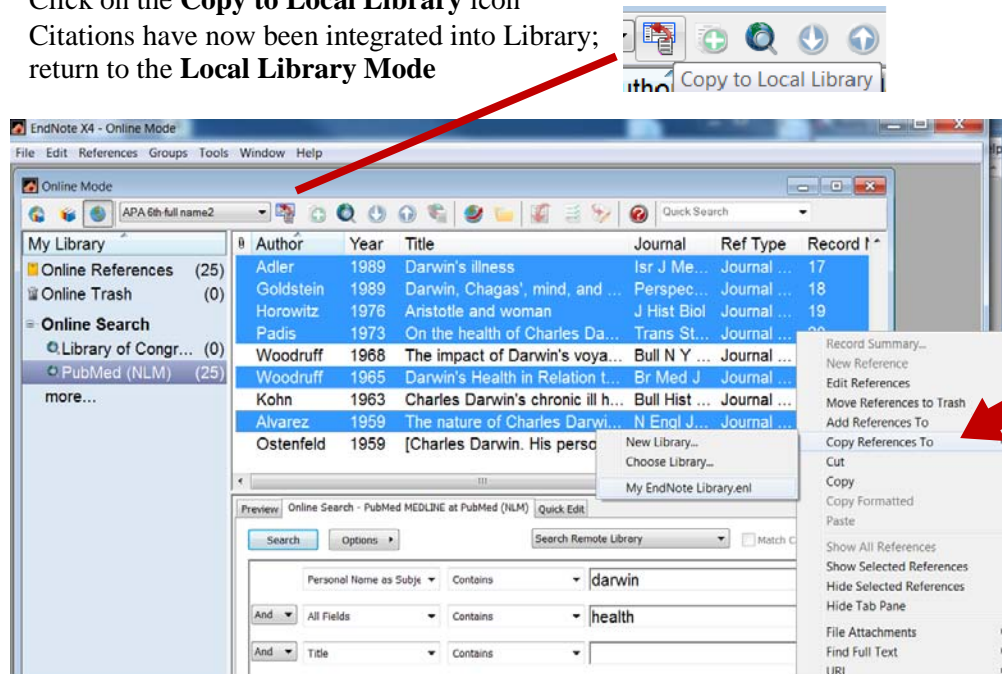
- Enter search term(s) (see example above)
- Limit term(s) to a specific field by using the **Field** pull down menu
- Select appropriate Boolean operator (and, or, not)
- The search example above has two criteria; add as many criteria as needed by using the **plus** buttons on the right
- Click **Search**

Confirm Online Search

- The search is run; the **Confirm Online Search** window indicates number of citations found in online database (if this number is too large, click cancel and add more criteria)
- Click **OK** to continue

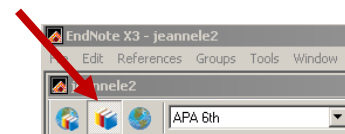


- Citations are added to an **Online Mode Library**; this allows you to review and select the citations you want for transfer to your Library.
- Double click on an individual citation to see the complete record (close the record to return to list)
- Use **Ctrl + Click** to select multiple references or just click if you want one reference
- Click on the **Copy to Local Library** icon
- Citations have now been integrated into Library; return to the **Local Library Mode**



Create a Group

- Click on **Local Library Mode** (see arrow at right)
- From **My Library** pane highlight **Copied References**
- Select all references
- Right click > **Add References To > Create Custom Group** (or select an existing group)
- Name the group, the selected references will be added to it



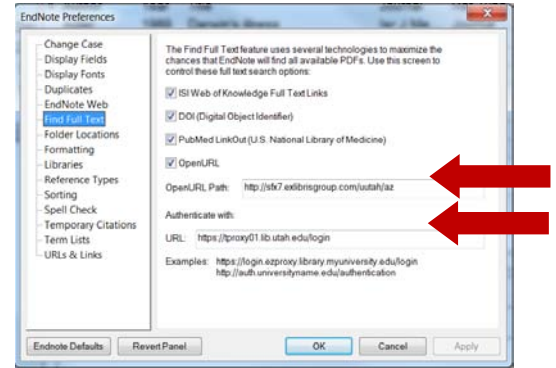
EndNote Preferences for Find Full Text

In order for the **Find Full Text** to work to your advantage, set up the Find Full Text Preferences in EndNote.

Go to **Edit > EndNote Preferences > Find Full Text**

Select ISI, DOI, PubMed, OpenURL and add this URL to

- **OpenURL Path:** <http://sfxhosted.exlibrisgroup.com/uutah/az>
- **Authenticate with:** <https://ezproxy.lib.utah.edu/login>
- Click **Apply > OK**

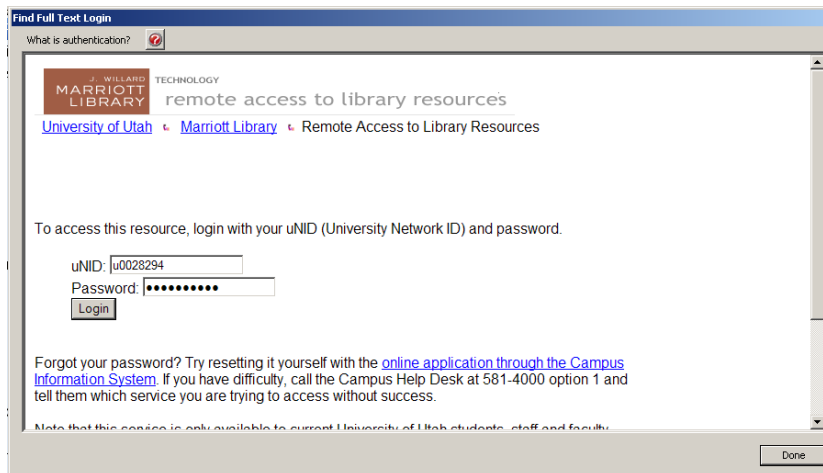


Find Full Text

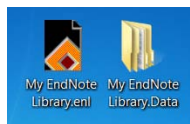
- Highlight the citations that were just added to your Library
- Right click and select **Find Full Text > Find Full Text > Authenticate**
 - Or you can use the **Find Full Text** icon at the top of the page



- Enter your University of Utah **uNID** and **password** to authenticate (for any one session, you only need to authenticate once)



- Monitor attachment progress in the **My Library** pane, under **Find Full Text** on left
- The full text PDF article is attached to the EndNote record. In addition, EndNote automatically creates a copy of the article and places it in the data folder. The data folder is associated with the Library of the same name and is essential for the proper operation of the EndNote program. **DO NOT** place items directly into the data folder. All items should be attached via the EndNote record. Based on where you saved your Library you should see an **.enl** and **.data** folder with the same name – for example:
 - MyEndNoteLibrary.enl
 - MyEndNoteLibrary.data



NOTE: Most of the connections in the Online Search menu are library catalogs; these do not require a login and password. Some of the connections are to proprietary databases and these require a login and password. (**Export** is a better option for most databases except PubMed.)

Review and Clean Up Records

See Exercise 6 for complete details

The APA 6th output style requires the use of the DOI in the reference if it is available. PubMed includes both the

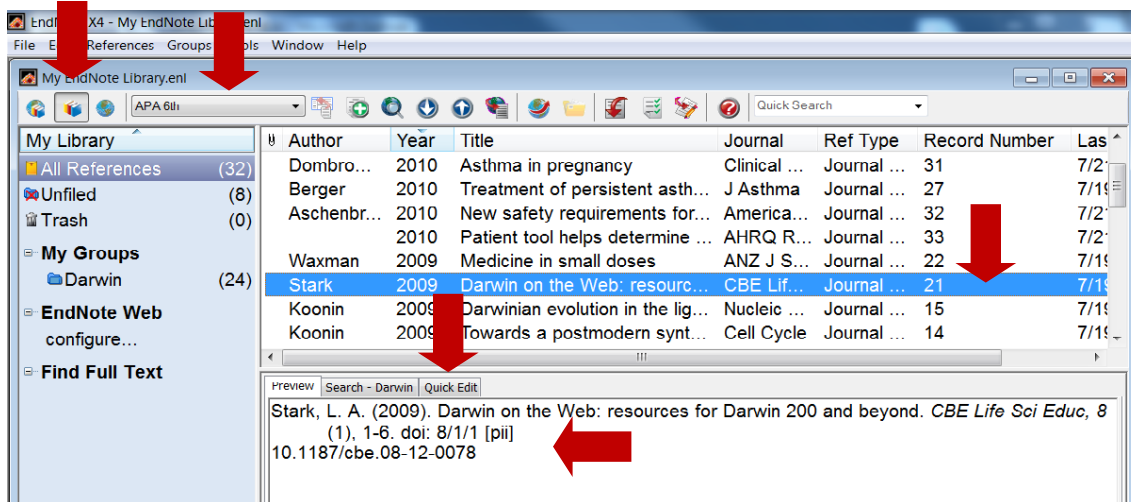
- **DOI** – Digital Object Identifier (begins with 10....) and
- **PII** – Publisher Item Identifier

The DOI and PII uniquely identify the cited reference and are also known as *persistent identifiers*.

Since PubMed provides both the DOI and the PII in the AID field both numbers appear in the DOI field in EndNote. You will need to remove the PII and any additional spacing in order for this to display properly in your list of references formatted for APA 6th.

Process:

- From the **Styles** pull-down menu select **APA 6th**
- Use the **Preview** tab at the bottom of the page
- Scroll through the references (Local Library Mode selected)
- For references with both the DOI and PII or references that repeat the word DOI – open the record and edit OR use the **Quick Edit** tab
- Close record and say **Yes** to save changes



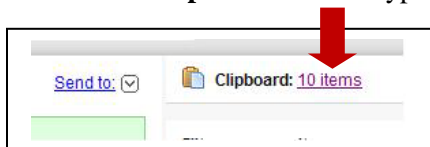
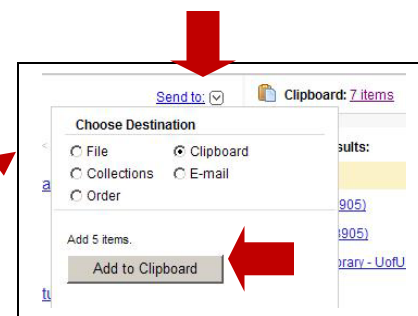
NOTE: You can copy the PII to the Notes field or another field of choice. You can also create a custom field in EndNote preferences. Go to **Edit > Preferences > Reference Types > Modify Reference Types > rename a Custom # field to PII.**



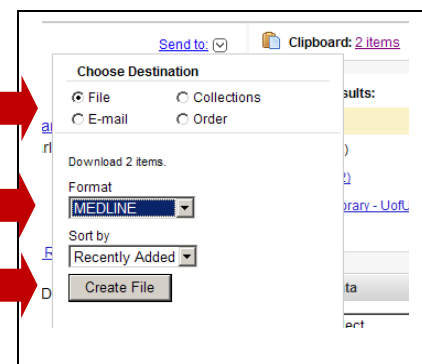
Exercise 2 – Save PubMed Citations and Import Citations from PubMed Text File to an EndNote X4 Library

Process to Save PubMed Citations:

1. Perform literature search in PubMed
2. Select items by clicking in the check box to the left of the citation
3. Use the **Send to** pull-down menu to place items in the clipboard
4. Select the **Clipboard** radio button and click **Add to Clipboard** button
5. Click on the **Clipboard #items** hyperlink



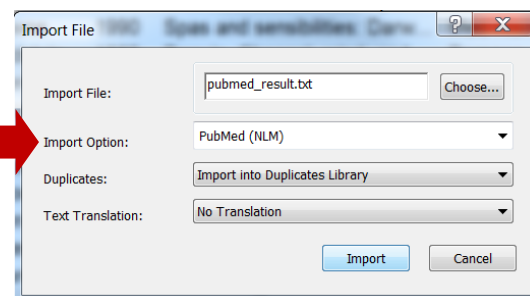
6. Use the **Send to** pull down menu to select **File; Format MEDLINE** and click on **Create File**
 - a. From the **File Download** window select **Save**
 - b. In the **Save As** window; direct the file to the Desktop
 - c. You can leave the file name as is or change it; click **Save**
 - d. The file must be saved as a .txt (Text File).
 - e. **Firefox** saves differently: From the



- Opening pubmed_result.txt** window select **Save File > OK >** select where to save
- i. The default folder for downloads is **Downloads**
 - ii. Change default in Firefox **Tools > Options > General > Save file to ...**

Steps for importing citations into EndNote

1. **File > Import > File**
 - a. Click **Choose** button and navigate to the saved text file
 - b. Select file and click **Open**
 - c. From the **Import Option:** pull-down menu select **PubMed (NLM)**
 - d. If the PubMed is not an available choice, find it by selecting **Other Filters** and browse to select
2. From the **Duplicates:** option select Import into Duplicates Library (recommended)
3. Click **Import** button



NOTE: If the above steps were completed successfully the EndNote Library displays a list of newly **Imported References**. Double click on an individual citation to view the record. Each record includes the complete citation with abstract and keywords (if they were available in the original database). It is recommended that you review the imported data to be sure it is accurate and make any necessary adjustments.

This is the perfect time to add a keyword to all of the imported citations using the **Tools > Change and Move Fields** command. Use the **Change Fields** tab and in **In** select **Keywords**; then click **Insert Special – carriage return**; select **Insert after field's text**; then type the new keyword. Click **OK** and proceed.

Refer back to Exercise 1 to:

- Create a group
- Find Full Text



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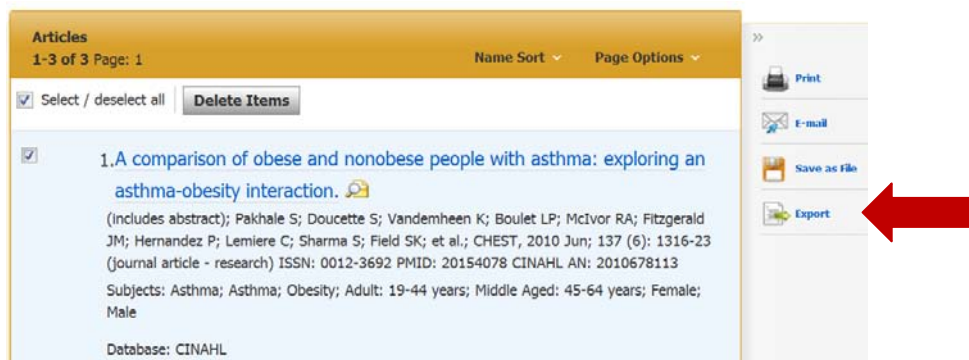
Exercise 3 – Perform a search in CINAHL, add citations to a folder, and Export citations to EndNote X4.



Export provides the benefit of using the search interface of the host database (for example EBSCOhost CINAHL, ERIC, PsycINFO) and the ease of transferring the citations directly into EndNote.

Process to Export CINAHL citations:

1. Perform literature search in CINAHL
2. Click the **Add to folder** link at the bottom of the citation to select references
3. Click the **Go to: Folder View** link in the **Folder has items** task pane (to the right) or select open **Folder** from the top blue bar
4. Check the **Select/deselect all** box to flag all citations; or select individual citations
5. Click **Export** icon



6. In the **Export Manager** - click the radio button for *Direct Export to EndNote ...* then click **Save** button



7. For **Internet Explorer**: From the **Choose Destination** dialog box select **EndNote** and click **OK**.
8. For **Firefox**: select **Open with > ResearchSoft Direct Export Helper**
9. If your EndNote Library is open, the citations populate that Library. If your Library is not open, EndNote will look for the Library. From the **Select a Reference Library** dialog box navigate to and highlight the Library where the citations should reside. Click **Open** button.
10. The selected citations have been Grouped in the EndNote Library in **Imported References** and are available for you to review, add notes, create a new Group or attach full text.
11. To view all reference select **All References** from the My Library pane.

Refer back to Exercise 1 to:

- a. Create a group
- b. Find Full Text

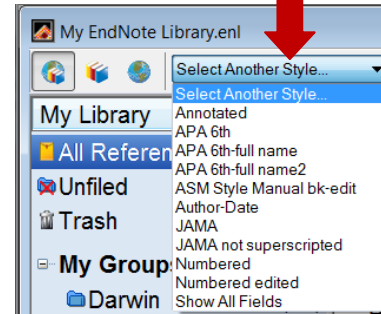


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Exercise 4 – Use *Cite While You Write* with MS Word 2007 to Create In-text Citations and a Bibliography at the End of the Paper

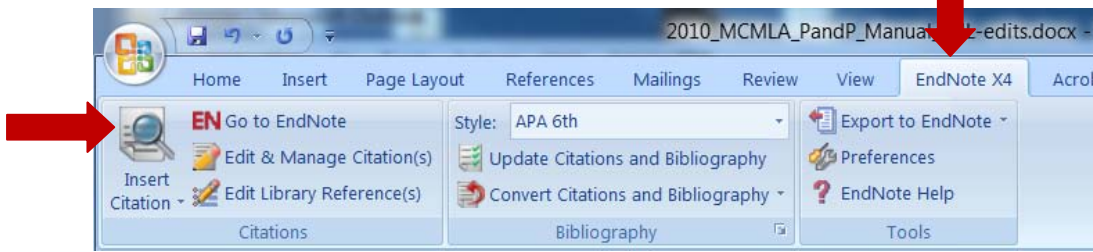
Basic process:

1. Open EndNote Library
2. Select **Style** from the pull down menu in the upper left corner (Select Another Style)
3. Open Microsoft Word 2007 and open the paper you are writing



METHOD 1 – Insert Selected Citation

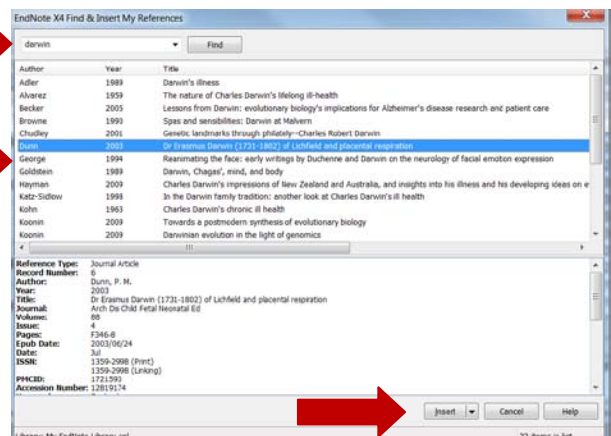
4. In EndNote highlight the citation that is to be cited.
5. In MSWord 2007, position the cursor in the text where you want to add the in-text citation
6. From the Ribbon select **EndNote X4** tab



7. Use the **Insert Citation** pull-down menu and select **Insert Selected Citation**
 - a. Note that the in-text citation displays in the appropriate format for the selected output style
 - b. The reference for that in-text citation displays at the end of the paper

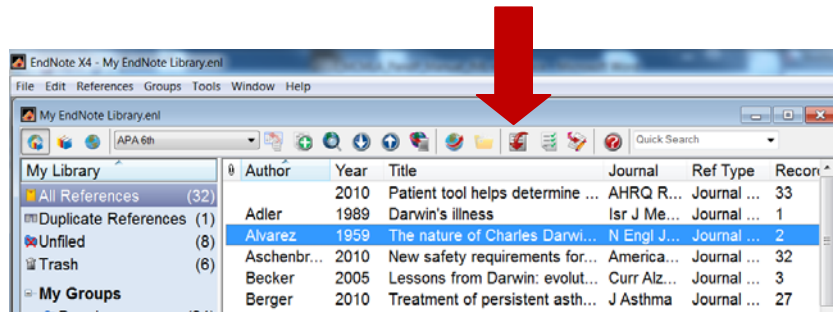
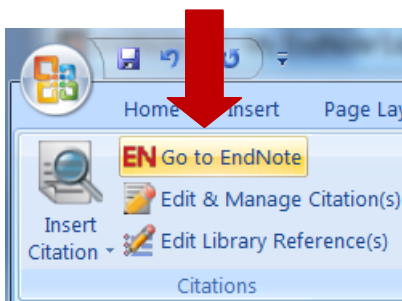
METHOD 2 – Find Citation

8. Place your cursor in the text where you want to add the in-text citation; from the EndNote X4 Ribbon use the **Insert Citation** pull down menu and select **Find Citation**.
 - a. Enter a term in the search box; click **Find**
 - b. Highlight the needed citation
 - c. Click **Insert**
 - i. Use **Insert** pull-down menu to select **Insert & Exclude Author/Year/More**
 - d. The in-text citation and reference are appropriately added to the paper



METHOD 3 – Go to EndNote > Insert Citation

- Place your cursor in the text in MSWord where you want to add the in-text citation; select **Go to EndNote**; highlight the reference in your EndNote Library and use the **Insert Citation** icon from within EndNote.



The in-text citation and reference are added to your paper

METHOD 4 – Copy and Paste

10. Copy and Paste

- In the EndNote Library highlight the reference of interest
- Edit > Copy OR CTRL + C**
- Return to Word document, place your cursor in the appropriate place in the paper where you want the citation and do a **Paste OR CTRL + V**
- In-text citation displays and reference is added to paper

METHOD 5 – Drag and Drop

11. Drag and Drop

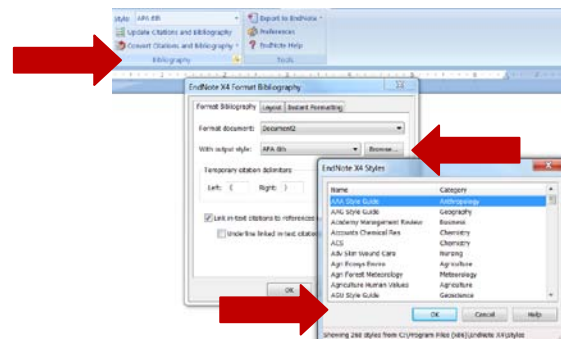
- In the EndNote Library, highlight a reference of interest
- Click-hold and drag** to appropriate place in the paper and release
- In-text citation displays and reference is added to paper

HINTS

- Highlight multiple references if you need to cite more than one reference at a time.
- If citations are not automatically formatted and a bibliography is not updated each time you insert a citation, in the Ribbon click **Bibliography**, select the **Instant Formatting** tab and click the **Turn On** button.

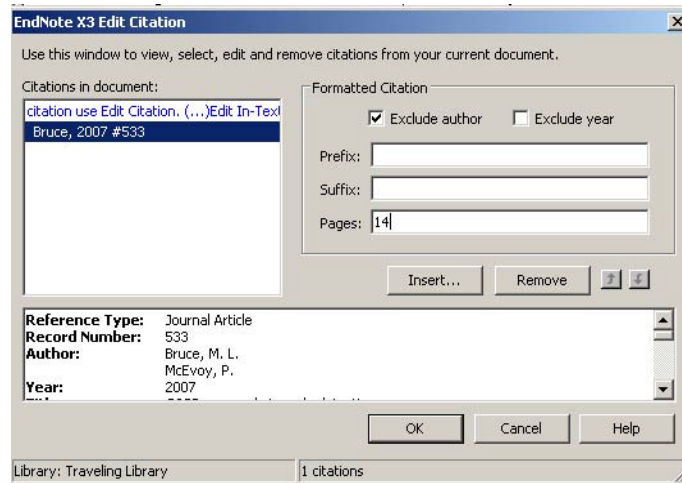


- To change an output style – in the Ribbon click on **Bibliography**; then select **Browse**; from the list of styles highlight the style of interest; lick **OK** and than **OK**



15. **Process to Edit an In-text Citation** If you need to add or subtract information from the in-text citation use **Edit Citation**.

- a. Right click on the in-text citation
- b. Select **Edit Citation(s)**
- c. Select Exclude author or Exclude year or more ...
- d. Add a Prefix, Suffix or Pages



In-text Citations--Corporate Author Adjustment Corporate name abbreviation after first occurrence: For example: *American Physical Therapy Association* In MSWord, right click on the citation you want to edit, go to **Edit Citation**. Select the option to **Exclude Author**, and then enter abbreviation (APTA) in the **Prefix** field. Then click **OK**. This will need to be done for each occurrence in the document.

NOTE: Cite While You Write (CWYW) works with MS Word 2003. The commands are available from the EndNote toolbar and are similar to MSWord 2007. See the MSWord 2003 CWYW Exercise 4.



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Exercise 5—Journals Term List and Editing an Output Style to Include Full Journal Names Adding Connection Files, Filters and Styles

Why do I have to do this? If you use a variety of databases to populate your EndNote Library, the journal names end up being a mix of full and abbreviated titles. That is because one database may use the full journal name (true for CINAHL) AND another may use the abbreviated journal name (true for PubMed). When creating your bibliography the journal name is pulled from the EndNote record unless you tell it otherwise. Editing the **Journals Term List** is one way to correct this inconsistency.

This is a two step process:

1. Edit the journal names in the **Journals Term List** (requires on going maintenance)
2. Edit the output style to use the **Full Journal** column in the journals term list (one-time adjustment)

This exercise will use the APA 6th output style.

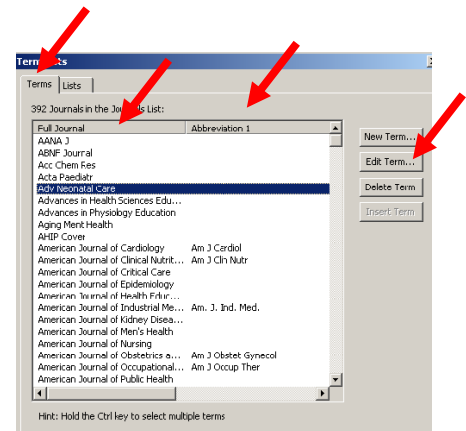
Step 1.

Go to: **Tools > Open Terms Lists > Journals Term List**

In the **Term Lists** window under the **Terms** tab be sure that only full journal names appear in the **Full Journal** column.

In the Full Journal column:

- highlight the abbreviated journal name
- select **Edit Term**
- move the abbreviated title to **Abbreviation 1** column
- retype or copy the full journal name in the **Full Journal** column
- click **OK**



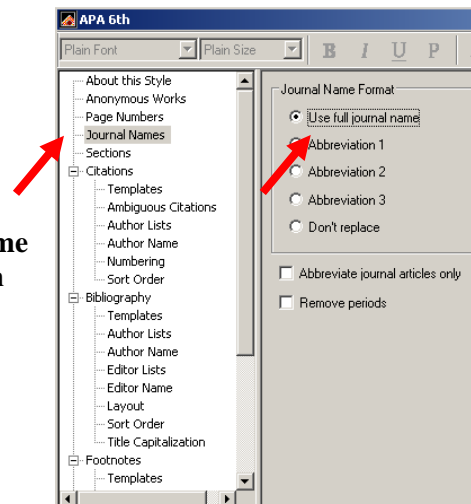
NOTE: Full journal names can be verified in **PubMed's Journals Database**, the **Eccles Library eJournals**, or the **Ulrich's International Periodicals Directory** (available from the Databases AtoZ list on the Eccles Library home page).

When you have completed this task, close the Terms Lists.

Step 2.

Go to: **Edit > Output Styles > Edit APA 6th**

- highlight **Journal Names** from the left column
 - Select **Use full journal name** from the right column
 - Go to **File > Save As** and save the file with a slightly different name; e.g. **APA6th_full_journal_name**
- NOTE:** EndNote will not let you save the edited file with the same file name; be sure to rename the file.
- Go to **Edit > Output Styles > Open Style Manager**
 - Select the newly edited APA file (e.g. **APA6th_full**)
 - This style is now available for your use.



NOTES:

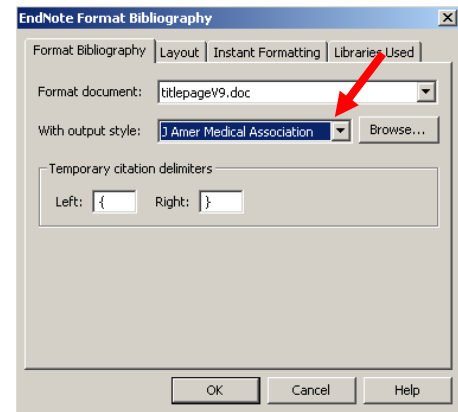
- You only need to do Step 2 once since the edited style becomes a permanent choice in your Output Styles list.
- EndNote creates a personal folder in My Documents labeled **EndNote**; within this folder it creates a **Styles** folder that contains all your edited Styles. **DO NOT** delete this EndNote folder. It ensures that the modified files will always be available to you.

Return to your word processor. From the EndNote toolbar, select **Format Bibliography with output style**, select the edited APA style (e.g. **APA6th_full**). Full journal names should now display in the Word document.

The bibliographic style selected in the **Format Bibliography** dialog box determines how EndNote formats the citations in your paper (in-text citations) and the references in the bibliography at the end of your paper. The output style takes care of text styles, punctuations, and sorting required for the citations and bibliography, as well as which fields are included in the bibliography.

You can use **Format Bibliography** to select a different style and reformat your document any time in the process.

To adjust line spacing, use the **Layout** tab.



NOTE: The output style used in your paper is determined by the journal to which you are submitting, or by your department's thesis committee or others. It is best to check with the publisher before starting the paper. If the style you need is not in the Output Styles Manager, you can do a **Google search** of the **journal title** with **output style** to see if the publisher has created the needed output style file.

Adding Connection Files, Filters and Styles

NOTE: EndNote X4 comes with a limited number of connection files, filters and styles. You can add all these files to your EndNote program folders or select individual files.

- Go to: <http://www.endnote.com>
- Click on **support & services** (at the top of the page)
- Under Downloads, for Output Styles (or Import Filters or Connection Files), click **More ...**
- **Accept** the Terms of Use
- Select the appropriate link or style
- **Accept** the Terms of Use (again!)
- In File Download click **Save**
- The complete zipped set will need to be unzipped and extracted
 - The individual file will find its way; no further action needed
- The files must be placed in the appropriate folder
 - My Computer > C drive > Program Files > EndNote X4 > Styles (or Connections or Filters)

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Exercise 6-- APA 6th and DOI

Edit an In-text Citation; Edit an Output Style

The 6th edition of APA requires that the **DOI** be added to the cited reference. The Digital Object Identifier is a unique way to locate a citation in the digital environment and provides a persistent link to identify an online item. The DOI can be searched in the DOI System website at <http://www.doi.org>; paste the DOI into the *Resolve a DOI Name* search box, click **Submit** and the complete citation for the item is then displayed.

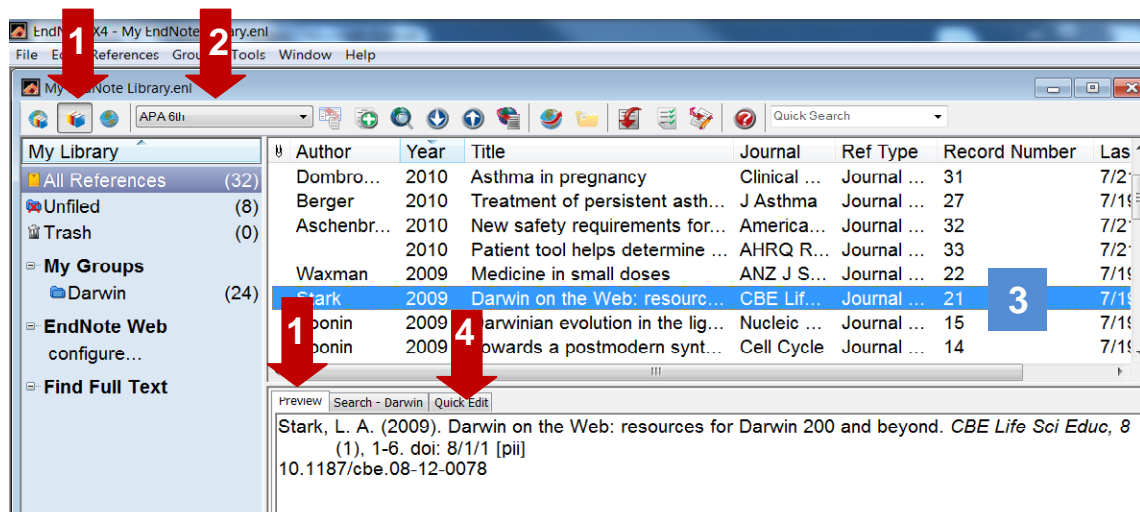
Using the DOI makes managing intellectual property in a networked environment much easier and more convenient.

Some things you need to know.

- PubMed has an **AID** (article identifier) field that populates the DOI field in EndNote
- The AID can contain both a **DOI** and a **PII** (publisher item identifier)
- For the purposes of APA 6th you need to remove the PII from the DOI field
- It is recommended that anytime you add PubMed citations to your EndNote Library you review the records and remove the PII from the DOI field. You can cut and paste the PII into another field or create a custom field to display the PII.

To review references in EndNote

1. Select **Local Library Mode** and the **Preview** tab at the bottom of the page
2. Use the **Styles** pull-down menu to select **APA 6th**
3. Highlight and scroll through the references looking for unwanted PIIs
4. Select **Quick Edit** and scroll to the DOI field; edit field by removing the PII and spacing or make other needed edits
5. Answer **Yes** to *Do you want to save the changes you made to the reference?*



The screenshot shows the EndNote interface with a list of references. The following table represents the data visible in the reference list:

Author	Year	Title	Journal	Ref Type	Record Number	Las
Dombro...	2010	Asthma in pregnancy	Clinical ...	Journal ...	31	7/2
Berger	2010	Treatment of persistent asth...	J Asthma	Journal ...	27	7/19
Aschenbr...	2010	New safety requirements for...	America...	Journal ...	32	7/2
	2010	Patient tool helps determine ...	AHRQ R...	Journal ...	33	7/2
Waxman	2009	Medicine in small doses	ANZ J S...	Journal ...	22	7/19
Stark	2009	Darwin on the Web: resourc...	CBE Lif...	Journal ...	21	7/19
ponin	2009	arwinian evolution in the lig...	Nucleic ...	Journal ...	15	7/19
ponin	2009	towards a postmodern synt...	Cell Cycle	Journal ...	14	7/19

The preview window shows the following citation:

Stark, L. A. (2009). Darwin on the Web: resources for Darwin 200 and beyond. *CBE Life Sci Educ*, 8(1), 1-6. doi: 8/1/1 [pii]
10.1187/cbe.08-12-0078

NOTE: You can copy the PII to the Notes field or another field of choice. You can also create a custom field in EndNote preferences: Go to **Edit > Preferences > Reference Types > Modify Reference Types > Modify Custom # field to PII**

Edit an In-Text Citation

In the Word document, right click on the inserted citation. Options include **exclude author**, **exclude year**, or **more**. Click on more to see additional options. (For example, prefix, suffix, pages.) The action selected only affects that in-text citation.

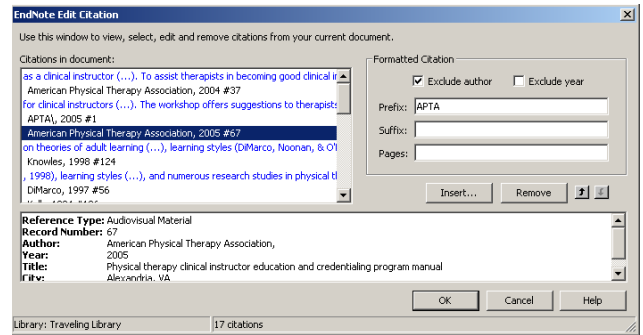
In-text Citations--Corporate Author Adjustment

Corporate name abbreviation after first occurrence:

For example: *American Physical Therapy Association*

In MSWord, click on the citation you want to edit,

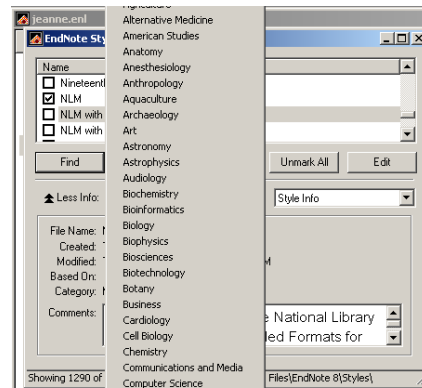
then go to **Tools > EndNote > Edit Citation**. Select the option to **Exclude Author**, then enter abbreviation (APTA) in the **Prefix** field. Then click **OK**. This will need to be done for each occurrence in the document.



Selecting Output Styles for Use

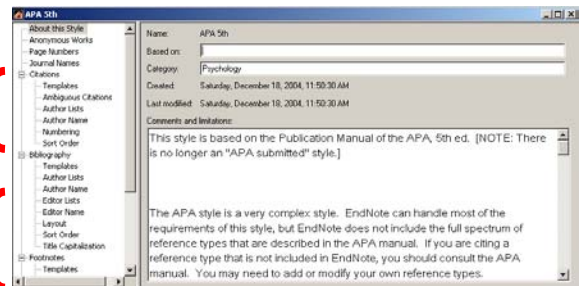
Path: **Edit > Output Styles > Open Style Manager**

Search for a style by broad subject area. Select by checking the box to the left of the style name.



Edit an Output Style

The specific output style you want to use may not be available from the list of 4000+ output styles. If that is the case, you can select a style that is similar and edit it. Path: **Edit > Output Styles > Edit <selected style>** From the style dialog box make appropriate changes. Changes can be made to the **Citations** (in-text information) and the **Bibliography**.



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Exercise 7—Saving a Compressed Copy of an EndNote X4 Library and Sharing a Library Using EndNote Web

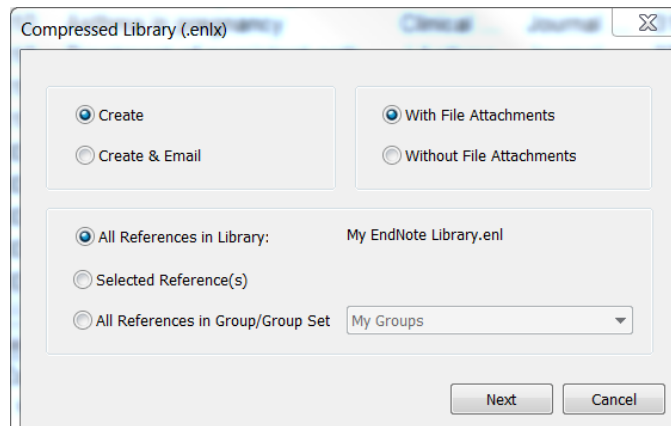
Saving a Compressed Copy of an EndNote X4 Library

You can save your complete library to a single compressed file in order to back up your library or share with a colleague. The pieces of this process are:

- the **.enl file** [<filename.enl>]
- the associated **.DATA folder** and all of its contents [<filename.DATA>]
- the **.enlx compressed file** [<filename.enlx>] that contains both the .enl file and the .data folder

In EndNote go to

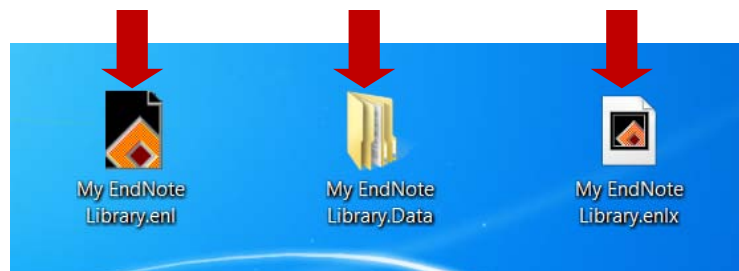
- **File > Compressed Library (.enlx)**
- From the **Compressed Library (.enlx)** window make appropriate selections
- Create or Create & Email – With or Without File Attachments
- All References, Selected Reference(s) or All References in Group/Group Set



- Click **Next**
- In the **Save Compressed Library (.enlx)** window, you can rename the file and navigate to the place where you want to save the file; click **Save**
- If you elected to **Create & Email** the library, EndNote will launch your default email system, create a new email and attach the compressed file to the email.

Restore the Compressed Library File

- Double-click on the .enlx file; the .enl file and .data folder will be extracted to the same folder where the enlx file is located. Open the .enl library to use.



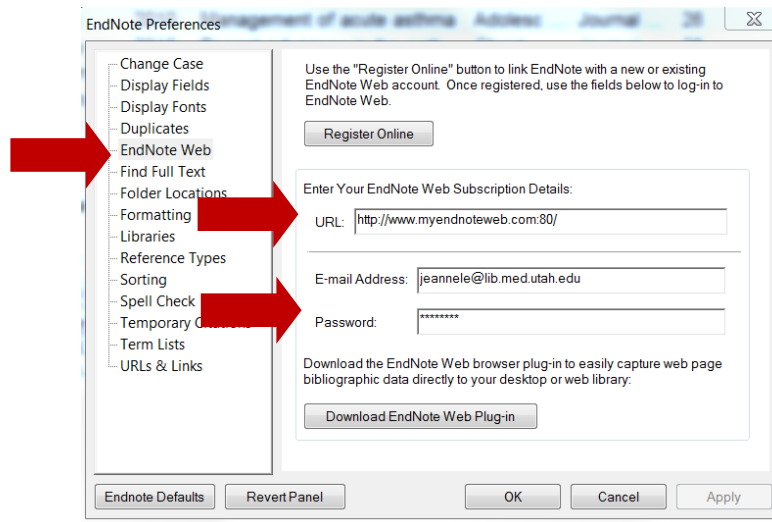
Sharing a Library Using EndNote Web

EndNote Web is available University of Utah students, staff and faculty. This web-based bibliographic management program allows the user to build a library with groups, create a paper and share a Library and/or a Group.

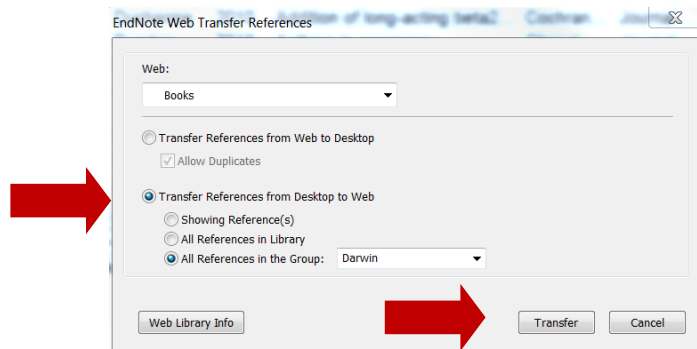
Sign Up for an account at the EndNote Web page. (From the library home page, click on Databases AtoZ, scroll of EndNote Web; Sign Up for an account; follow instructions)

To transfer references from EndNote to EndNote Web:

1. In **EndNote** go to **Edit > Preferences > EndNote Web**
2. Enter your EndNote Web Subscription Details:
 - a. URL > <http://www.myendnoteweb.com:80/>
 - b. Enter E-mail Address and Password
 - c. Click **OK** (this only has to be done once!)



3. Select **My Local Library > EndNote Web > transfer**
4. From the EndNote Web Transfer References window select **Transfer References from Desktop to Web**
5. The transfer of references from the Desktop to the Web begins



6. Log-in to your **EndNote Web** account
 - a. Select citations of interest
 - b. Use the **Add to group** pull down menu to create a **New Group**
 - c. Enter a New Group name and click **OK**
 - i. References are added to the **All My References > My Groups** pane on the left
 - d. Select the **Organize** tab at the top of the page
 - e. Select **Manage My Groups**
 - i. Under **Share**, put a checkmark next to the group you want to share and click **Manage Sharing**
 - ii. Click **Start sharing this group**.
 - iii. Enter e-mail addresses
 1. The person you are sharing with must have an EndNote Web account
 - iv. Select **Read only** or **Read & Write**
 - v. Click **Apply** and close the window
 - f. The person you share EndNote Web citations with views those citations by clicking on the group name under **My References > Groups Shared by Others**



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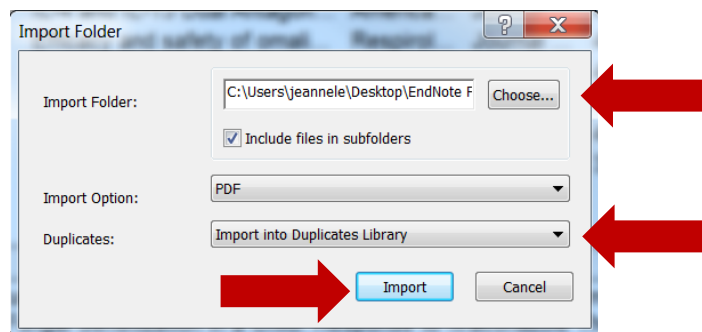


Exercise 8—Import PDF Folder with PDF files to Create EndNote Records

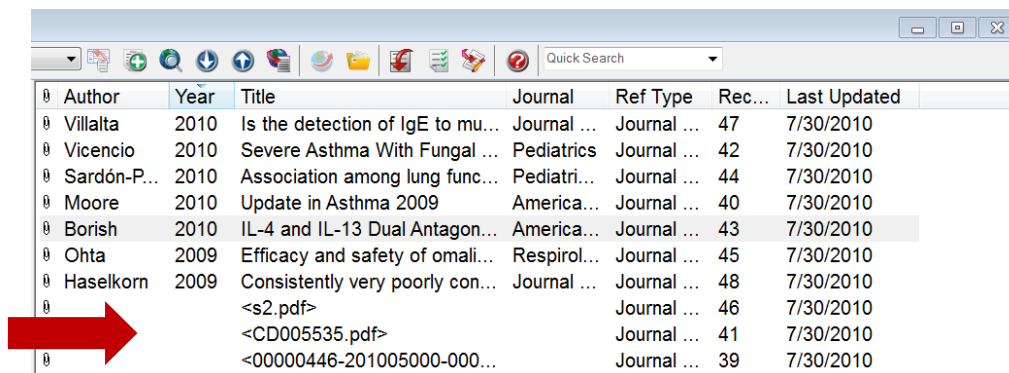
EndNote X4 allows you to take an existing collection of PDF files to create an EndNote record. If you have lots of full-text journal articles in PDF format, you can use those files to populate your EndNote Library with the record information. (Many of you have been waiting for this one!)

In EndNote go to

- **File > Import File > Folder**
- Navigate to the folder that contains the PDF files and select it
- If the selected folder has subfolders – check the *Include files in subfolders* option
- Select *Import into Duplicates Library* to have EndNote identify potential duplicate citations
 - A reference is considered a duplicate when Author, Year, Title and Reference Type match a reference already in the library
- Click **Import**



- The import process begins
 - EndNote looks for the DOI (digital object identifier) in the PDF
 - The system matches DOI information using the **DOI Resolver** tool in CrossRef (<http://www.CrossRef.org>)
 - Bibliographic data is transferred to the EndNote record
 - AND the PDF is attached to the EndNote record
 - The file is copied to the .DATA folder; the file name is kept
 - At this point you can review the record for accuracy and add keywords using the *Change Field* command
 - Not all items will be identified or include all information
- Add items to a new or existing group



Author	Year	Title	Journal	Ref Type	Rec...	Last Updated
Villalta	2010	Is the detection of IgE to mu...	Journal ...	Journal ...	47	7/30/2010
Vicencio	2010	Severe Asthma With Fungal ...	Pediatrics	Journal ...	42	7/30/2010
Sardón-P...	2010	Association among lung func...	Pediatric...	Journal ...	44	7/30/2010
Moore	2010	Update in Asthma 2009	America...	Journal ...	40	7/30/2010
Borish	2010	IL-4 and IL-13 Dual Antagon...	America...	Journal ...	43	7/30/2010
Ohta	2009	Efficacy and safety of omali...	Respirol...	Journal ...	45	7/30/2010
Haselkorn	2009	Consistently very poorly con...	Journal ...	Journal ...	48	7/30/2010
		<s2.pdf>		Journal ...	46	7/30/2010
		<CD005535.pdf>		Journal ...	41	7/30/2010
		<00000446-201005000-000...		Journal ...	39	7/30/2010

Note the incomplete record information added.

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EndNote Work Flow

