



QUICK REFERENCE GUIDE TO ENDNOTE

Raymond Chong, PhD

August 5, 2021

rchong@augusta.edu
<http://www.augusta.edu/alliedhealth/pt/bio/lab/rchonglab.php>

QUICK REFERENCE GUIDE TO ENDNOTE

This **Quick Reference Guide** provides basic information to help you use the EndNote software to create a library of references as well as format your work in MS Word.

Table of Contents

INSTALLING ENDNOTE	1
CREATING A LIBRARY OF REFERENCES	2
IMPORTING REFERENCES TO YOUR LIBRARY.....	3
MANUAL ENTRY METHOD.....	3
IMPORTING DIRECTLY FROM WITHIN ENDNOTE.....	4
IMPORTING FROM THE INTERNET	4
FORMATTING YOUR WORD DOCUMENT.....	7
ENDNOTE SETTINGS	7
SHARING YOUR LIBRARY	11
METHOD 1: MAKE A COPY OF THE LIBRARY AND SEND IT TO YOUR COLLEAGUE	11
METHOD 2: SHARE YOUR LIBRARY ONLINE	11
IMPORTING REFERENCES IN A WORD DOCUMENT THAT WAS FORMATTED BY ENDNOTE.....	13
GOOD TO KNOW.....	14
• WHEN I OPEN A WORD DOCUMENT, THE "ENDNOTE X8" TAB IS MISSING IN THE TOOLBAR.....	14
• ENDNOTE KEEPS INTERRUPTING ME TO FORMAT MY DOCUMENT	14
• I WANT TO BACK-UP MY LIBRARY (THE FILE THAT CONTAINS MY COLLECTION OF REFERENCES) BUT WHERE IS IT?	14
• WHY ARE SOME OF THE CITATIONS IN THE REFERENCE LIST NOT FORMATTED CORRECTLY?.....	14
• HOW DO I ADD A PAGE NUMBER TO A CITATION IN THE TEXT?	15
• HOW DO I CREATE A REFERENCE FOR A WEBSITE?	15
• HOW DO I SHARE MY LIBRARY?.....	ERROR! BOOKMARK NOT DEFINED.
• ADDING TEXT NEXT TO THE CITATION	16

INSTALLING ENDNOTE

1. Download and install the EndNote software on your laptop. Get help from IT if you need to.

1. Visit an IT Help Desk in the EC building, Greenblatt Library, or Harrison Education Commons building or 24/7 at 706-721-4000.
2. Uninstall any older versions of EndNote, then install EndNote 20 Desktop. After install, request technician to update EN20 to the latest version.
3. NOTE: because of network security concerns, individual users may not have permission to update EN20 to the latest version (*Help > Check for Updates* in Windows, *EndNote 20 > Update* in Mac)
4. Browsers – Safari 5.0 or later, Chrome 31 or later, Firefox 27 or later, MS Internet Explorer 8.x or later are supported. Browser plug-ins are supported for the latest Chrome, Firefox, Edge, and Opera browsers.
5. Microsoft Word 2016, 2019, or Office 365 is the preferred word processor in Windows or Mac; see <https://endnote.com/product-details/compatibility> for other word processors. Cite While You Write is how EndNote communicates with the word processor.

https://augusta.service-now.com/kb_view_customer.do?sysparm_article=KB0010779

Note: DO NOT save the software to a cloud-based system.

2. **After installation**, if you are prompted to update EndNote – do it. If it does not prompt you, update EndNote manually:

Click Help > Check for Updates

CREATING A LIBRARY OF REFERENCES

• You need a place to store your references/bibliography. This file is called the library. Here's how to do it:

1. Click File > New > name your library, e.g. References
2. Save

NOTE: You can start with one library and add more later. The default name for newly created libraries is "My EndNote Library" – always change this default name to something else and store it on the hard drive of the computer.

An EndNote Library is a file with an *.enl extension and a corresponding *.DATA folder with the same name. Create as many EndNote Libraries as needed.

1. Click Edit > Preferences (in Macs: EndNote20 > Preferences)
 - a. > Display Fields > Column 1 = Author, 2 = Year, 3 = Title. Check the "Display all authors ..." box at the bottom
 - b. > Formatting > uncheck boxes 1 & 2
 - c. > Temporary citations > Temp Citation Delimiters
 - d. > Term Lists > check all boxes except the last two
 - e. OK
2. At top menu: **Library > Open Term Lists > Journals Terms List**, *Terms List* window opens.
 - a. Click **Terms** tab, select any list of journal names that appear and delete all.
 - b. At **Lists** tab, *highlight Journals* choice and click **Import List** button.
 - c. At *Open* window, *highlight Medical* file and click **Open** button. Approximately 15K Journal names will list in alphabetical order in the Terms tab, Journals section. **Close Terms List** window.

NOTE: for Mac users, the pathway is *Apps > EndNote 20 > Terms Lists > Journals > Medical*

3. At top menu: Library > Sort Library
 - a. Sort Library window opens to set default sort preferences:
 - First Author – click A-Z
 - Year – click Z-A
 - Record Number – click A-Z
 - b. Default sort order can be overridden in the references window of EndNote by clicking the Display Field names to resort entire library by that Field in A-Z or Z-A order.

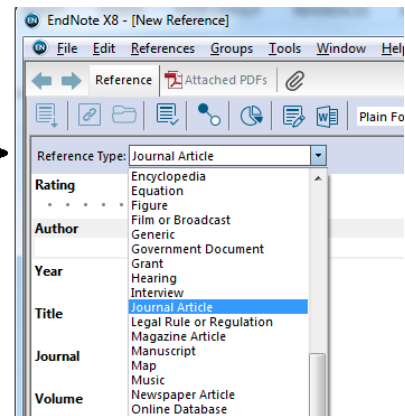
IMPORTING REFERENCES TO YOUR LIBRARY

There are three ways to do it:

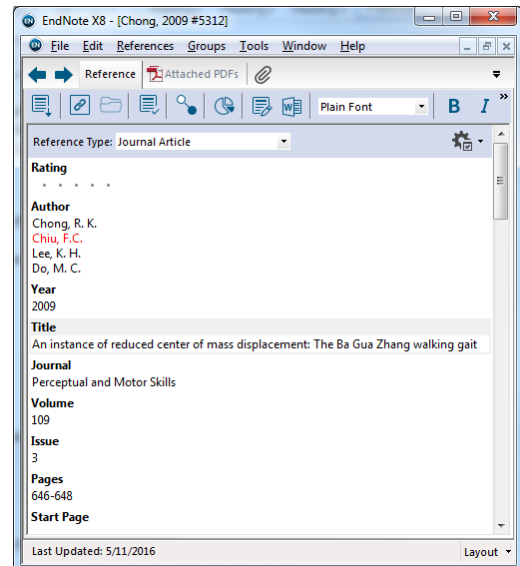
1. Manual Entry
2. Importing directly from *within* EndNote
3. Importing from the internet, e.g. PubMed, Google Scholar, etc

MANUAL ENTRY METHOD

Click *References > New Reference >* select the type of reference



- Start entering the reference information
- The example on the right is for a regular journal article
- Pay particular attention to the spacing, commas and periods



NOTE: Internet sources need to be entered into your library manually. Refer to the Good-to-Know section at the end of this document.

IMPORTING DIRECTLY FROM WITHIN ENDNOTE

1. At left column, at Online Search, *click PubMed (NLM)*
 2. Start searching for articles
 3. Highlight the reference you want
 4. R-click the mouse > *Copy Reference To* > click your library
- The reference is now stored permanently in your reference library (until you delete it)

NOTE: Whenever you are done importing references, go back to your reference library by clicking the *Folder* icon

IMPORTING FROM THE INTERNET

TWO EXAMPLES ARE GIVEN BELOW: IMPORTING REFERENCES FROM 1) PUBMED AND 2) GOOGLE SCHOLAR

Importing References from PubMed

- Open your EndNote
- Open your Web browser (Chrome, Explorer or Firefox)
- Go to the PubMed search box at the Greenblatt Library home page
<https://www.augusta.edu/library/>

The screenshot shows the Greenblatt Library website. At the top, there are social media links for YouTube, Facebook, and Instagram. Below that is a notice about library services resuming on June 1, 2021. The main section features a search bar with the text "Search the library catalog" and a "SEARCH" button. Below the search bar, there are three tabs: "More Tools", "GALILEO", "PUBMED" (highlighted with a red box), and "RESEARCH GUIDES". At the bottom, there are three columns of content: "Librarians" featuring Peter Shipman, MLIS; "Services & Resources" with links to Access Services, Databases, Find Your Librarian, Library Account, Library Tutorials, Pure Research Profiles, and Research Guides; and "News & Events" with a featured article about Women's History Month.

- In the Search field, enter your search terms (e.g, the PICO technique) to execute your search
- Click the Search button to see the results
- Export the results to your EndNote
 1. Check the boxes of the results that you want to import
 2. Click the "Send to" menu
 3. Select *Citation Manager*
 4. Click *Create File*
 5. Select *Open With*
 6. If prompted, select EndNote 20 or ResearchSoft Direct Export Helper to import references. Chrome browser users may have to click on the downloaded file in the lower left corner of the browser to transfer the records directly to the EndNote library.
 7. Click OK
 8. Go to your EndNote. You should see the imported references in your library

Note: If the above instructions do not work, try this method of importing references:

1. Select File from the "Send to" menu
2. Select MEDLINE from the "Format" menu
3. Select *Create File*
4. Select *Save File* (make sure you know where your laptop saves the file)
5. Click OK
6. Go to your EndNote
7. Select *File* from the menu at the top
8. Click *Import*
9. Click *File*
10. For *Import File* – look for the file you just saved
11. For *Import Option* – choose PubMed (NLM)
(**Note:** if you do not see "PubMed (NLM)", click *Other Filters* and look for it)
12. For *Duplicates* -- choose *Import All*
13. For *Translation* -- choose *None*
14. Click *Import*
15. Go to your EndNote. You should see the imported references in your library

Importing References from Google Scholar

- Go to the Greenblatt Library home page and click "Databases A-Z" link; find *Google Scholar* and open *Scholar*.
Another option is to run *Google Scholar* search. At the results list, click the quotation marks icon at the record. When window opens, click the EndNote link to transfer the record to the EndNote Library.
- At the top (above the Google logo), click *Settings*
- Under the Bibliography manager section, click "Show links to import citations into"

- Select *EndNote* and click *Save* (blue button at the bottom)
- In the Search field, enter the search terms to execute your search
- Import the results you want by clicking *Import Into EndNote*

The screenshot shows a Google Scholar search interface. The search bar contains the text "lower back pain exercise therapy spinal manipulation". Below the search bar, the results are displayed under the "Scholar" heading, indicating "About 49,500 results (0.13 sec)". Two articles are listed. The first article is titled "[HTML] Nonpharmacologic **therapies** for acute and chronic **low back pain**: a review of the evidence for an American **Pain Society**/American College of Physicians ...". The authors are R Chou, LH Huffman, and the journal is Annals of internal medicine, 2007 - Am Coll Physicians. The article has 1 page, is cited by 773, and has 10 versions. The "Import into EndNote" button is circled in red. The second article is titled "[HTML] A clinical prediction rule to identify patients with **low back pain** most likely to benefit from **spinal manipulation**: a validation study". The authors are JD Childs, JM Fritz, TV Flynn, JJ Irgang, and the journal is Annals of internal medicine, 2004 - Am Coll Physicians. The article has 1 page, is cited by 720, and has 22 versions. The "Import into EndNote" button is also present for this article.

- The reference is now stored permanently in your reference library (until you delete it)
- Go to your EndNote. You should see the imported reference in your library

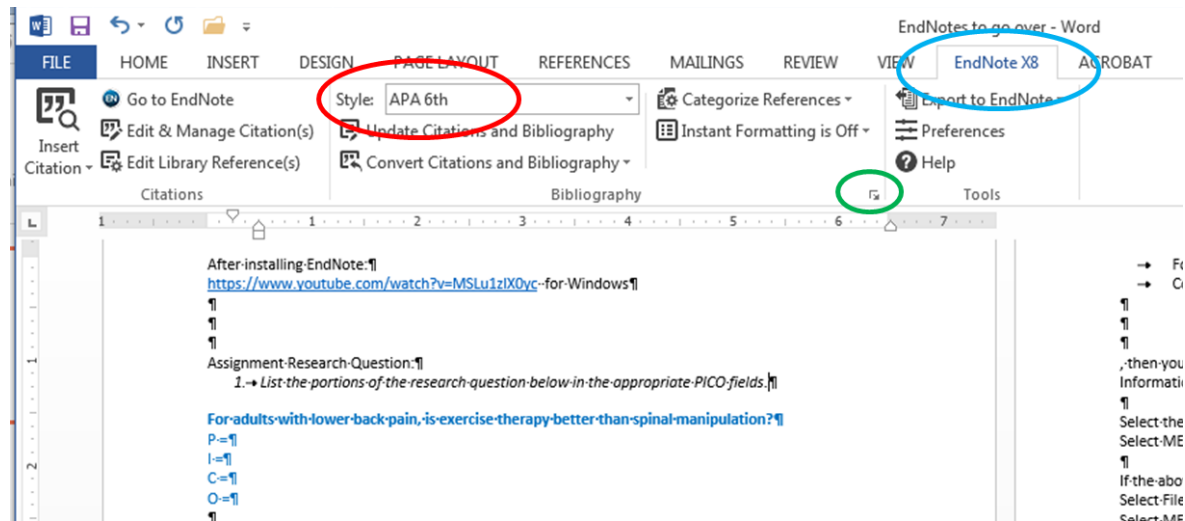
FORMATTING YOUR WORD DOCUMENT

NOTE

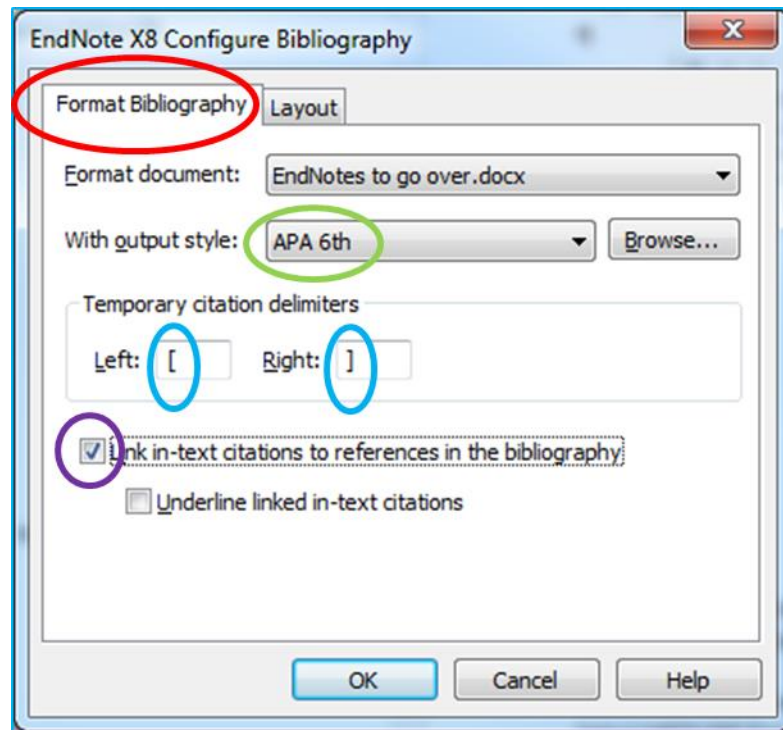
- EndNote formats your document by looking for delimiters in the text. I recommend using square brackets, for example:
 - For adults with lower back pain, exercise therapy may be better than spinal manipulation [donaldson 2016; qaseem 2017; schneider 2016].

ENDNOTE SETTINGS

- Click "EndNote 20" in the Word menu at the top of the page
- For Style – select APA 7th (as an example). If it is not showing, click *Select Another Style* and look for it
- At the EndNote 20 tab in the Bibliography section of the Word ribbon, click the section corner arrow.

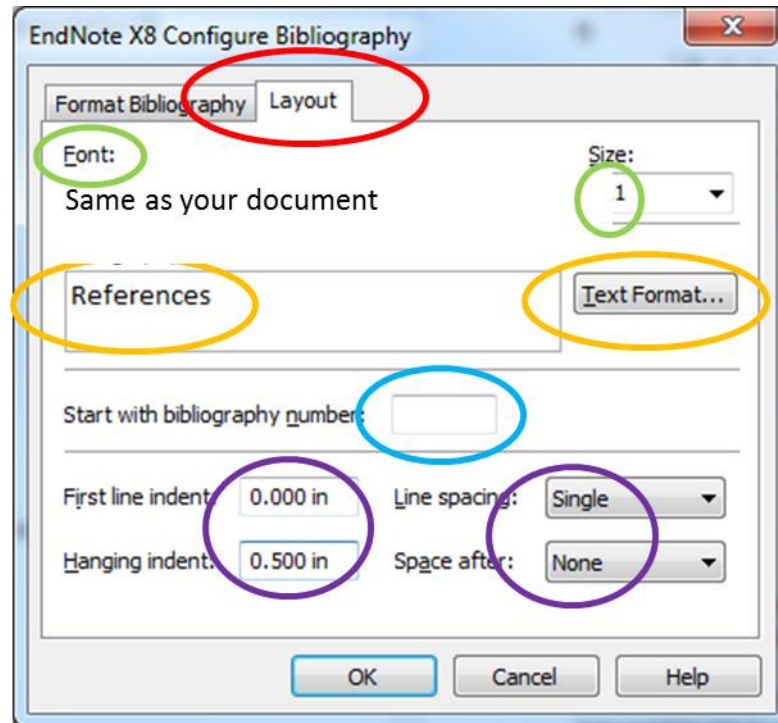


- In the *Format Bibliography* window:
- Choose *APA 7th*, [] brackets and check the *Link In-text Citations* box



- In the *Layout* window:
- Choose the same Font and Size as your Word document
- Name the reference list, e.g. References,
Text Format: check the Bold box, choose the same Font and Size as your document
Click OK
- Leave the bibliography number blank
- Set the *First Line Indent* to "0" and hanging indent to "0.5", *Line Spacing* to *Single* and *Space After* to *None*

Click OK and follow the EndNote prompts to format your document



When formatting is done, your citations (in APA style) should look exactly like this:

For adults with lower back pain, exercise therapy may be better than spinal manipulation (Donaldson, Petersen, Cook, & Learman, 2016; Qaseem, Wilt, McLean, & Forciea, 2017; Schneider et al., 2016).

The References list should look like this:

References

- Donaldson, M., Petersen, S., Cook, C., & Learman, K. (2016). A Prescriptively selected nonthrust manipulation versus a therapist-selected nonthrust manipulation for the treatment of individuals with low back pain: A randomized clinical trial. *Journal of Orthopaedic and Sports Physical Therapy*, 46(4), 243-250. doi:10.2519/jospt.2016.6318
- Qaseem, A., Wilt, T. J., McLean, R. M., & Forciea, M. A. (2017). Noninvasive treatments for acute, subacute, and chronic low back pain: A clinical practice guideline from the American College of Physicians. *Annals of Internal Medicine*, 166(7), 514-530. doi:10.7326/m16-2367

Schneider, M. J., Terhorst, L., Murphy, D., Stevans, J. M., Hoffman, R., & Cambron, J. A. (2016). Exploratory analysis of clinical predictors of outcomes of nonsurgical treatment in patients with lumbar spinal stenosis. *Journal of Manipulative and Physiological Therapeutics*, 39(2), 88-94. doi:10.1016/j.jmpt.2016.01.001

For tips about how to add a page number to your citation, refer to the Good-to-Know section at the end of this document.

SHARING YOUR LIBRARY

The library is the collection of references which you created. There are two ways to share your library:

METHOD 1: MAKE A COPY OF THE LIBRARY AND SEND IT TO YOUR COLLEAGUE

- Open the library in EndNote
- From the *File* menu, select *Compressed Library (.enlx)* to display a Compressed Library dialog
- At the top left side of the dialog, select *Create*
- At the top right of the dialog, select *With File Attachments*
- In the bottom half of the dialog, select *All References in Library*
- Click *Next* to display a file dialog
- Use the file dialog to save to an EndNote Compressed Library
- Email your colleague and attach the compressed file

If you encounter a problem, re-save the file as "Without File Attachments" and try again in the in-text citation but include it in the References list.

METHOD 2: SHARE YOUR LIBRARY ONLINE (A BIT TRICKY)

- Open the library in EndNote
- From the *Tools* menu, select *Sync* and follow the prompts to set up an online account
- From the *File* menu, select *Share* and follow the prompts to email your colleagues.
 - You may only Share and Sync one EndNote Library with other colleagues.
 - You may give other Read only or Read/Write privileges in the shared EndNote Library.
- Your colleagues will receive an email to accept the invitation and set up an account to share the library
- To use the shared library:
 - From the *File* menu, select *Open Shared Library* and select the library name

NOTE

- The imported reference numbers are different from their original reference numbers. Only you know whether this is important.
- Track changes to the shared library by clicking the Activity Feed icon (next to the Share Library icon)

IMPORTING REFERENCES IN A WORD DOCUMENT THAT WAS FORMATTED BY ENDNOTE

- Open the Word document
- From the EndNote tab, click *Export to EndNote > Export Travelling Library*
- Save the references as a new EndNote library

GOOD TO KNOW

- **When I open a Word document, the "EndNote 20" tab is missing in the toolbar**

Go to the EndNote FAQ page and follow the instructions to fix the problem:

<http://endnote.com/support/faqs/endnote>

- **EndNote keeps interrupting me to format my document**

It is tracking your citation activities. To reinstate the EndNote tab in Word on Windows devices, follow the instructions below in the first instance:

1. In Word, click the File tab and choose Options
2. Select Add-Ins from the left menu
3. Under the heading Active Application Add-ins, check whether you have the EndNote Cite While You Write COM Add-in (see the Type column)
4. If it is not listed, then go down to the bottom of the window to the Manage drop-down list
5. With COM Add-ins showing, click Go
6. If CWYW is installed, then EndNote Cite While You Write will appear as one of the add-ins available. Make sure the box beside it is ticked, then click OK
7. The EndNote ribbon should appear immediately in Word.
8. There can be other reasons the EndNote tab does not appear in Word. Contact technical support 1-8885031050.

- **I want to back-up my library (the file that contains my collection of references) but where is it?**

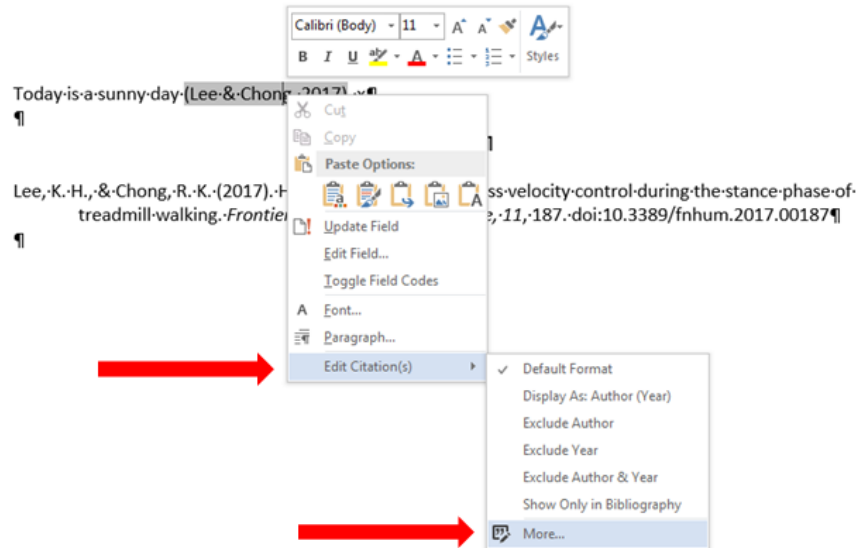
- File > Save a Copy (A Save a Copy window opens)
- The word "Copy" is added to the EndNote Library file name; save the file to the hard drive

- **Why are some of the citations in the Reference list not formatted correctly?**

After you format the document with EndNote, right-click the citation (in the Reference list) > *Edit Citation(s)* > *More* > *Edit Reference* > correct the mistake

• How do I add a page number to a citation in the text?

After you format the document with EndNote, right-click the citation that you want to edit > *Edit Citation(s)* > *More* > enter the page number(s) > *OK* > *Save* your work



NOTE

- Use the above method to insert page numbers if you are citing a textbook several times in the document but different pages. In your References list, cite the textbook once leaving out the page information.
- If you're citing the book only once in the document, you can leave out the page number(s) in the in-text citation but include it in the References list.

• How do I create a reference for a website?

You must manually enter the website reference into EndNote:

From the menu: *References* > *New References* > *Reference Type* > *Web Page*

Fill in the following information: 1) Author, 2) Year, 3) Title, 4) Access Date, and 5) URL

For example: Author = Chong, R.K.
Year = 2015

Title = This is a test
 Access date = 7/23/19
 URL = <https://www.augusta.edu/>

The full citation will appear as follows:

Chong, R.K. (2015). This is a test. Retrieved 7/23/2019, from
<https://www.augusta.edu/>

If the date is not available, insert "n.d." in the Year

The citation will appear as follows:

Chong, R.K. (n.d.). This is a test. Retrieved 7/23/2019, from
<http://www.augusta.edu/>

If the author is not available, enter the organization's name and a comma, e.g.
 National Institutes of Health,

The citation will appear as follows:

National Institutes of Health. (2015). This is a test. Retrieved 7/23/2019, from
<http://www.augusta.edu/>

NOTE

- Track changes to the shared library by clicking the Activity Feed icon (next to the Share Library icon)

• Adding text next to the citation

Go to *Edit* and *Manage* and add text as needed – it might be simpler than the method described. Or do the following:

- **Prefix Text:** To add text to print before the formatted citation, type the text immediately after the opening brace and then a backslash “\” to separate prefix text from the search text:

[see \Chong, 2014]

Or

[Chong, as cited in \Horak 2015]

- **Suffix Text:** To add text to print after a formatted citation, enter the suffix text immediately after the record number or enter a *third* comma after the search text and then type the suffix text:
 {Smith, 1995 #98 p.293}
 {Smith, 1995, dinosaur, p.293}