Guide to EndNote X7 Citation Management Software: The Basics

For Windows Users

About EndNote:
EndNote is a software program that allows users to search, retrieve, and store reference citations from bibliographic databases such as PubMed, Medline, CINAHL, Web of Science, and Google Scholar (among many others) as well as library catalogs such as CLIO and WorldCAT. It can generate bibliographies, reading lists, and in-text citations in many styles, and works with Microsoft Word, enabling users to add and format their citations as they write their papers.

_Columbia University Libraries makes EndNote X7 for Windows available to all current students, faculty, and staff, free of charge, through a site license with Thomson Reuters._

The EndNote software is available for downloading at: [http://cuit.columbia.edu/endnote](http://cuit.columbia.edu/endnote). Make sure both the software file AND the license (.dat) file are downloaded and saved in the same folder on your computer before you proceed with installation.

For the latest EndNote updates, you may go to: [http://endnote.com/downloads/available-updates](http://endnote.com/downloads/available-updates)

For additional help or information about using EndNote, please contact the informationists at hs-library@columbia.edu or make an appointment at [http://library.cumc.columbia.edu/appointment-scheduling](http://library.cumc.columbia.edu/appointment-scheduling).

In this guide you will learn how to:

1. Create an EndNote Library database
2. Add references
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   d. Importing a text file
3. Organize your library references
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5. Viewing and editing PDFs in EndNote
6. Search for references online from within EndNote
7. Insert EndNote references into Microsoft Word documents
1. Create an EndNote Library database

After installing EndNote X7 software from CUIT (making sure that you have downloaded both the software and the Licence.dat file in the same folder), locate the program in your Program Files. Upon running EndNote for the first time you will be prompted to create a New Reference Library.

Name the file My EndNote Library (default) and save it in your Documents library.

Saving it here ensures that if you need to uninstall/reinstall or upgrade the software your library will be safe.

Congratulations! You just created your EndNote library. Now you will learn how to fill it with references, and use EndNote to make your research more efficient.
2.a. Add references: Direct export from a database

The **quickest, most efficient** way to fill your EndNote library is while you are doing your literature searches in the databases (i.e. PubMed, Medline, CINAHL, Web of Science, Scopus, Cochrane, etc.). Nearly all academic literature databases have **export functions** into various bibliographic management systems, including EndNote. There are also ways to directly export from books, certain newspapers, and other resources (discussed in the Guide to Direct Exports into EndNote).

**Tip:** Use **Firefox** when directly exporting citations from databases into EndNote.

**Example:** PubMed

The best way to export citations in PubMed is to use the **Clipboard** function to collect all the citations, and then export them all together at one time. As you are doing your literature search, when you find an article you want to keep, use the **Send to:** Clipboard function to temporarily save it.

Once you have finished your literature search (**Note:** The Clipboard is **temporary** and lasts only 8 hours – for permanent saving use MyNCBI), go to your Clipboard. From within the Clipboard, select **Send to:** Citation manager.

**Note:** When you have more than 10 references in your Clipboard you will be given the option to select how many references to send. Make sure you select a number from the drop-down menu large enough to cover all of your references.

Select **Open with** and browse for EndNote X7. Then select "**Do this automatically...**" so that the next time you create a PubMed export file it will already know that it should be directly opened in EndNote.

Your references should now appear in your EndNote Library under **Imported References.**
2.b) Add references: From a PDF

The new major feature in EndNote X7 is OCR (optical character recognition), which means it is able to extract the citation information from a PDF that is imported into EndNote, thus entering both the PDF and the corresponding citation. This only works on relatively new articles (those published in the latter half of the 2000’s and later), so articles published prior to this time will not work.

It is advised to always check the citation information that is brought in to make sure that it is correct.

To add a reference from a PDF, you must have the PDF downloaded on your computer to start.

Go to File >> Import...
Select the PDF you want to import into EndNote.
The Import Options should be set to PDF File or Folder.

Below is this PDF brought into EndNote with the correct citation information attached.
2.c. Add references: Manually

Occasionally you may have a reference that you need to put into EndNote that is from a resource that does not have a direct export option (i.e. government reports from organizations like the CDC, NIH, or WHO, websites, unpublished works, non-print mediums, etc.). For these references you will need to put them in manually.

To add a reference manually, go to References >> New Reference.

Or select the New Reference button from the top of your EndNote library.

Depending on the resource type (e.g. Journal Article, Webpage, Government Document, Report, Newspaper, etc.), the available fields will change.

Click into each field to manually enter the information you have for that resource – you do not have to fill in each field, only what is necessary for your citation, and to assist you for your research.

Hint: If the author is an organization (ex. WHO) enter the name as: World Health Organization, The comma at the end tells EndNote to see the organization as the “last name” of an author, thus not rearranging it to last name, first initial. If your citation looks like Organization, W.H. then you need to edit the name in your reference.

To save a file, simply X out of the New Reference and select Save changes to the record.
2.d. Add references: Importing a text file

There are some instances where you are unable to directly export into EndNote from a database. You may be on a computer without access to your EndNote library. Or you may be on a computer that does not have Firefox browser. In these cases, the easiest way to get your citations into your EndNote library is to save the citations as a text file (.txt) or RIS file and either email the file to yourself for later, or directly import the file into EndNote.

Example: PubMed

From the Clipboard in PubMed, this time instead of sending it to the citation manager, you will Send to: File. For the Format, make sure to select MEDLINE from the drop-down menu. Click Create File.

In the Firefox pop-up window, instead of opening the file with Endnote, this time select Save File. The text file will now be saved to your Downloads folder. This will also work if you have previously used the citation manager and directly exported, as it creates a new type of file.

**Note:** In other browsers (IE, Chrome, etc.) the file will simply be downloaded and in your Downloads folder.

This text file can be attached to an email or USB drive, or you can immediately import it into EndNote.

From within your EndNote library, go to File >> Import >> File....

Locate the text file (pubmed_results.txt) on your computer or USB drive.

For Import Options, go to Other Filters...

And search for PubMed.

Once you have added it as a filter, it will be listed in the Import Options drop-down menu.

You’ve now successfully imported references from a Text file into EndNote.
3. Organize your library references

As your library grows you will want to find ways to organize your references to make your research more efficient.

*Tip:* It is highly advised to keep only a single EndNote Library, and within that single library to use Groups and Group Sets to organize your references.

EndNote X6 uses a combination of **Groups** and **Group Sets** to help you organize and categorize your citations:

- **Group:** A group of citations (Folders)
- **Group Set:** A group of groups (Headings)

Make an organizational system that makes sense to you, and makes sense to your work.

**Groups**

To create a group go to **Groups >> Create Group.**

Name your Group.

Select the references you want to put in this group, and then Drag & Drop them into the new Group.

**Group Set**

To create a Group Set, go to **Groups >> Create a Group Set.**

Name your Group Set, which will become it’s own heading (My Groups is actually a default Group Set).

You can now Drag & Drop Groups you want to put into this Group Set.

You now have Groups within your Group Sets.

Organization and naming is all up to you and your own personal needs.
4. Attach PDFs to your citations

Manually

The easiest way to attach a PDF file to a citation into Endnote is to Grab to PDF file/icon and Drop it onto the correct citation.

This is useful for PDFs that you already have on your hard drive, or for citations that cannot be retrieved automatically (Find Full Text) and must be downloaded manually.

You can tell that the attachment was successful when the Paperclip is displayed next to the citation.

Find Full Text

The quickest way to attach PDFs to citations (in bulk) is to use the Find Full Text feature within EndNote.

First, to set up the Find Full Text feature so that it can get access to the full-text articles through Columbia subscriptions, go to Edit >> Preferences >> Find Full Text.

Make sure all the databases are selected and enter the following URLs:

Open URL Path = http://rd8hp6du2b.search.serialssolutions.com
Authenticate with URL = http://ezproxy.cul.columbia.edu/login?url=

Select the references you want to find the full-text for (Ctrl+A to select all in a Group, Folder, or All References).

Click on the Find Full Text... button at the top of your EndNote Library.

Note: If you are off-campus, you will need to enter your UNI and password. If you are on-campus you can simply click Continue.

As EndNote is searching, it will show progress of how many PDFs are Found, URLs Found, and PDFs Not Found. When Searching... disappears the run is complete. The citations with attached PDFs can be identified by the Paperclip.

EndNote typically finds on average about 50-75% of the articles.

If it did not find an article, there is one of two reasons:
1. We do not have full-text access to it (we may not have the title, or it may be in print off-site, check CLIO for journal title)
2. We do have it electronically but EndNote was unable to find it (locate E-link for the article)
5. Viewing and editing PDFs in EndNote

EndNote X7 has a changeable layout, which can be manipulated by changing the Groups and Reference Panels, found under Layout in the lower right corner.

Hovering near the edge of the panels and using the size arrows can also change the panel sizes to make it the most useable.

One of the major improvements in EndNote X7 is the ability to view attached PDFs directly within EndNote, as well as highlight and add notes.

By clicking the Box and Arrow button in the top left corner of the PDF preview, the PDF opens in a new full-size window within EndNote. From here you can annotate the PDF. To return to your EndNote Library, simply click the Box and Arrow button again.

These new features in EndNote X7 allow for even more functionality and ease of research within the EndNote software.
6. Search for references online from within EndNote

By switching the Mode in EndNote X7 from Integrated Mode (default) to the Online Mode, you can search some common databases directly from within your EndNote Library and quickly copy those citations back into your Local Library.

Once in the Online Mode, select a database from the list (ex. PubMed) or go to more... to find other databases and library catalogs (including Columbia University’s CLIO), to search.

Note: Columbia does not necessarily subscribe to every database listed under “more...” so be sure the database you are trying to access is one we have access to.

IMPORTANT NOTE: You CANNOT access EndNote online searching from Off-Campus!!

Once you have connected to an online database (in this example, PubMed), you can search and retrieve all the articles that fit your criteria.

Tip: EndNote’s Online Search capabilities are very limited and their algorithms are weak. It is very strongly advised to do literature searches from the actual database, and leave EndNote online searching to locating specific citations by searching Author/Title/Journal/Year combinations instead of keywords.

To move a selected article to your Local Library, simply click Copy to Local Library. When you return to the Integrated or Local Library mode these articles will be found in the Copied References folder (as well as All References).

When you leave the Online Mode you will be asked if you want to discard all your online references. Since the Online Mode is a temporary folder, the ones you have NOT copied to your Local Library will be removed and the ones you have copied will be saved in your References.
7. Insert Endnote references into Microsoft Word documents

Arguably the biggest benefit of using EndNote is that it works within Microsoft Word so you can easily add and format your references as you write. By downloading the EndNote software, it automatically connects to Word when you install and run it the first time.

To use EndNote from Word, simply go to the **EndNote X7 tab** in Word. This is where all the tools needed to add and modify your citations and format your paper are located.

It will create an in-text citation where the cursor was and **bibliographic reference** at the bottom of the page/paper.

You can change the style/format (ex. APA 6th and JAMA), by going to **Style and Select Another Style...** There are nearly 500 styles automatically in your Library, but if there is a journal or style type that you want that is not listed, EndNote’s website has over 5,000 styles that can be downloaded to your EndNote software.

One feature of EndNote that is often overlooked is the **Traveling Library**. This can be useful to share references with others that are already in a document.

What it does is create an **EndNote Library** (either a new one or adding to an existing one), by extracting the **EndNote references** in the Word document, so you can send your paper to a colleague/professor/etc. and they can export the **Traveling Library** out of it and put your citations in their **EndNote**.

This is also the way editing and additional citations can be added and shared as well.