

Hints for Using EndNote X5

Before you start

Open a new library by selecting File and then New. Name the new library. Go to the Tools pull down menu. Select Open Terms List. Then select Journals Term List. Click on the tab entitled Lists. Select Journals. Click on Import Lists on the left. To find the Terms List go to your C drive then Program Files then EndNoteX5 and then Terms Lists folder. Highlight the .txt file you are interested in and click on Open. You can select more than one – such as Medical and BioScience. This will import a list of journal titles and their abbreviations to use when you are creating your bibliographies. Finally, go to Preferences under the Edit menu and click on Term Lists. Uncheck the boxes that indicate the Terms list will be updated as records are imported. This way the terms list that you imported will be the master list, and not the imported records list. This may require some inputting of terms into the journal list for those that are missed.

Setting up Groups

If you consider EndNote to be like an electronic filing cabinet, Groups are the file folders within that cabinet. To create Groups to help you stay organized, click on the Groups pull down menu and select Create Groups. A box will appear under My Groups on the left, prompting you to type in a name for that group. You can do that multiple times, creating as many groups as you would like.

Manually entering corporate names

When entering corporate names such as the Centers for Disease Control and Prevention, be sure to put a comma after the last part of the corporate name. In the case of the Centers for Disease Control and Prevention, you should enter the name as Centers for Disease Control and Prevention, (notice comma). If you do not place a comma after the last part of the corporate name, EndNote will recognize the first part of the name as the last; resulting in Prevention, Centers for Disease Control. If you have a reference for the University of California, Berkeley – enter it like this – University of California,,Berkeley. The two commas will indicate to Endnote that Berkeley is not the first name, but rather goes after University of California with a comma.

To preview your journal style

There is a tab at the bottom of the screen under your list of references entitled **Preview**. Click on the tab and it will show the citation you have highlighted in the journal style you have selected as it would appear in your bibliography. To change the journal style, click on the pull down menu above your list of references. It is a good idea to check your journal style in this way. *Do not rely solely on EndNote to determine your style.*

To adjust your journal style

If your list of references is not looking the way you want it to you can change the style. Go to Edit and select Output Styles. Click on Open Style Manager (or select the style from the list if it is visible). Select the style you want to edit from the list and click on Edit in the right hand corner of the screen. To change how the journal names are displayed click on Journal Names in the left hand listing. Select how you want the journal name to appear. If you want to change the format of the references or in text citations, click on Templates under either (or both) Citations or Bibliography). You can make journal titles italicized, add fields, etc. When you close the screen it will default to saving this new style as the name of the old style with the word Copy after it (ie JAMA Copy) You can accept this or rename it.

To pull up a particular article

On the left of the screen, click on PubMed or Web of Science under Online Search. A search box will now appear in the lower middle section of the EndNote screen. Type in the information that you know (authors, year, title – or change the fields to search on two authors, keywords, etc.) Click on Search. When your search has been completed, click on the references you want and drag and drop them over to your Group. You can also select ones you don't want and drag and drop them to the Trash.

Find Full Text

EndNote X5 allows you to select references from your database and have EndNote search for the full text of those articles in the background. To take advantage of the full text subscriptions available through the library, you have to set up some parameters. In EndNote, go to the Edit pull down menu and select Preferences. Click on Find Full Text at the bottom of the list on the left. Make sure there is a check mark in all the boxes, and in the box labeled **OpenURL path** type in the following: <http://px7gv7gt2n.search.serialssolutions.com/> then click on Apply, and then click OK.

Go back to your library and select articles you would like full text for by highlighting them. Then click on the icon that looks like a globe with paper in front of it above the listing of references. Depending on how many references you have selected, this may take awhile.

EndNote does not pick up everything we own. Click on the citations that indicate only a URL was found or it wasn't found at all. Follow the URL in the record and often it will lead you to the PDF. You can also check the Ejournal Finder for the title. If a PDF is found, save it to your desktop, open the record in EndNote that the PDF belongs to, scroll to the *File Attachments* field, right click and click on *Add Attachment*. Find your PDF and click *Open* and it will be added to your record.

Another Method for Adding PDFs

Select a reference in the Library window, or open the reference for editing. From the *References* menu, choose *File Attachments*, and then choose *Attach File*. On the file dialog, select a file to link to the selected (or open) reference. The PDF will then be attached to that record.

Adding a Folder of PDFs

In EndNote X5, you can also add a folder of PDFs – EndNote will populate information from the records. The PDFs cannot be scanned and have to be publisher provided and have a DOI number (Digital Object Identifier – a unique number for that PDF). To use this feature, click on File, then Import, then select Folder. A dialog box will appear – in the Import Folder box click on Choose to browse for your folder. Then click on Import.



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