

EndNote 20

SOUTHERN ILLINOIS UNIVERSITY SCHOOL OF MEDICINE LIBRARY

Contact reference@siumed.edu with questions not addressed in this guide.



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Getting Started

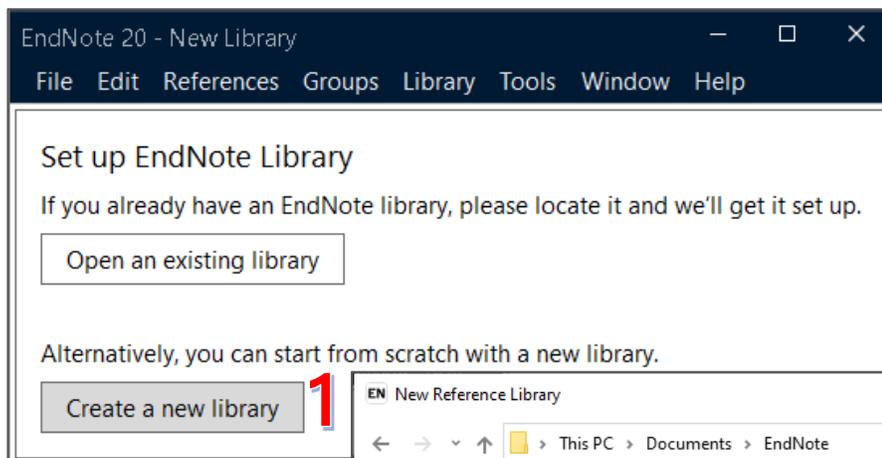
Installation

Southern Illinois University School of Medicine provides EndNote Desktop to affiliated students, residents, faculty, and staff at no charge. Installation requests are managed by SIUSOM IT. To request EndNote, email techsupport@siumed.edu and indicate whether the software is to be installed on an SIU owned or personal machine. Tech Support will then assist with installation. EndNote Desktop licenses expire upon leaving SIU.

Screenshots were taken using EndNote 20 for PC. There are minor interface changes for Mac which have been noted within the written instructions.

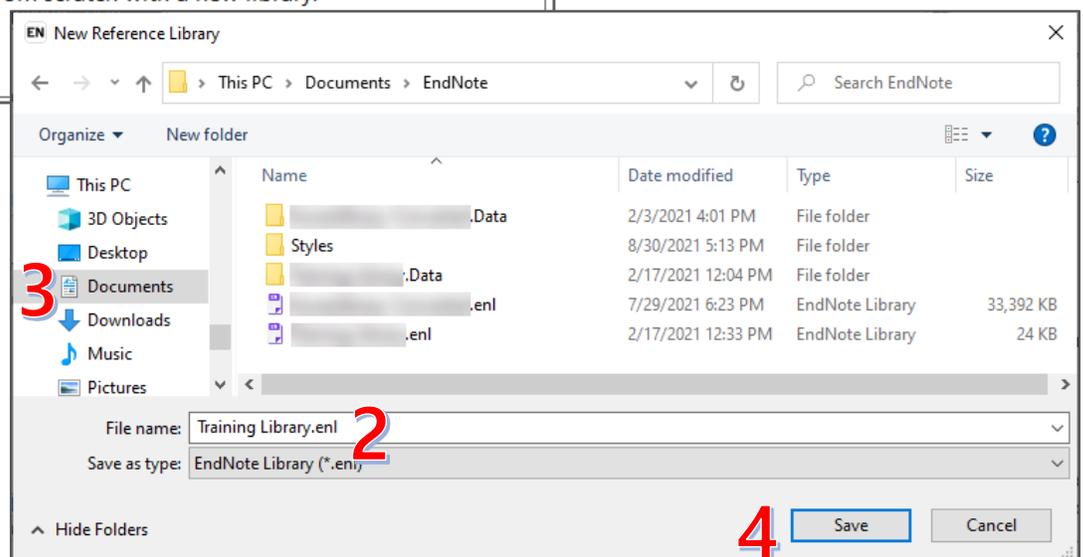
Creating Libraries

Opening EndNote will prompt to either open an existing “library” file or create a new library:



To create a library:

1. Click the **Create Library** button.
2. Name your library
3. By default, new libraries are saved in an “EndNote” folder in the “Documents” folder.
4. Click the **Save** button.



Every library will have an associated “data” folder containing any attachments ([see page 15](#)). If moving files, be sure to also move the data folder. It is best practice not to save libraries on removable drives or cloud services. Instead, sync your library to EndNote Online, the cloud version of EndNote ([see page 21](#)).

Interface Overview

The screenshot shows the EndNote 20 interface with three main panes labeled A, B, and C.
Left Pane (A): Contains the library's organization structure, including 'MY GROUPS' (My Groups, Sea Animals) and 'ONLINE SEARCH' (Library of Congress, PubMed, etc.).
Central Pane (C): Displays a list of references with columns for Title, Author, Journal, and Year. A search bar is at the top.
Right Pane (B): Shows the 'Summary' tab for a selected reference, displaying the title, authors, and abstract text. It also includes a 'Copy citation' button and a citation preview.

Left Pane (A)

- Displays the library's organization structure (Groups & Group Sets).
- Find Full Text tool status
- Online search short list

Central Pane (C)

- Reference list and/or online search results.
- Search bar
- Shortcut buttons

Menus (D)

- **EndNote 20 (Mac)** – About EndNote; Preferences; Check for Updates; Quit
- **File** – Open, Create, Share, Export/Import, or Compress libraries
- **Edit** – Preferences; text tools (for modifying/creating styles)
- **References** – Adding/editing references; Attachments; Find Full Text
- **Groups** – Create/Delete groups and group Sets; Add references to groups
- **Library** – Sync to EndNote Online; Find duplicate references; Add/manage term lists
- **Tools** – Manage citation Output Styles; Cite While You Write Microsoft Word plug-in
- **Window** – Display options
- **Help** – Check for updates; Link to output style downloads; Link to EndNote Online; About EndNote

Right Pane (B)

If the Right Pane is not displayed, double click a reference in the Central Pane to open it.

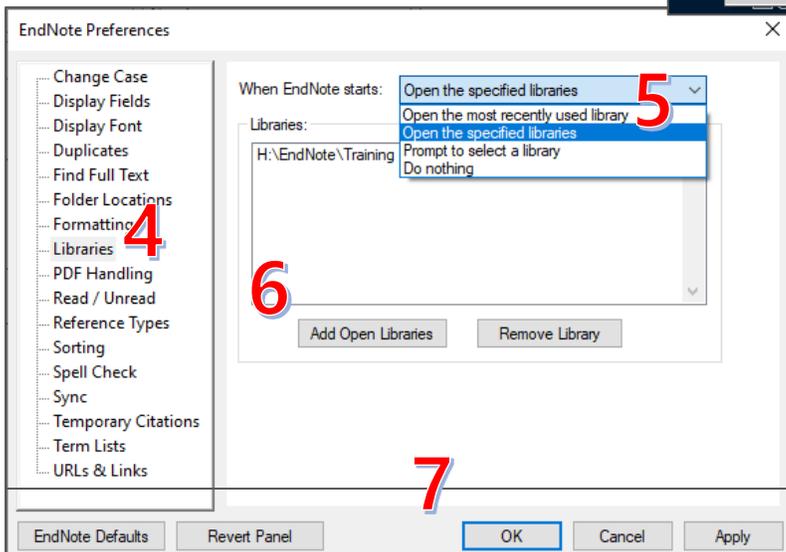
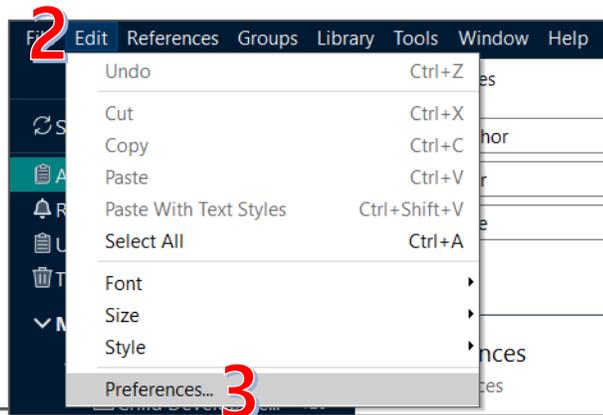
- Summary tab displays reference information and a quick citation
 - Option to add and view attachments
- Edit tab for editing reference information or adding notes

Panes may be resized by clicking & dragging boundary lines.

Open Libraries Automatically

To set up a library to open automatically at EndNote start-up:

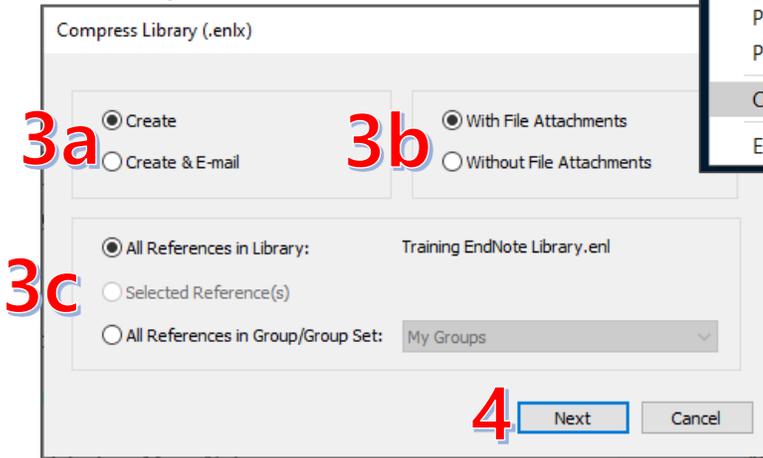
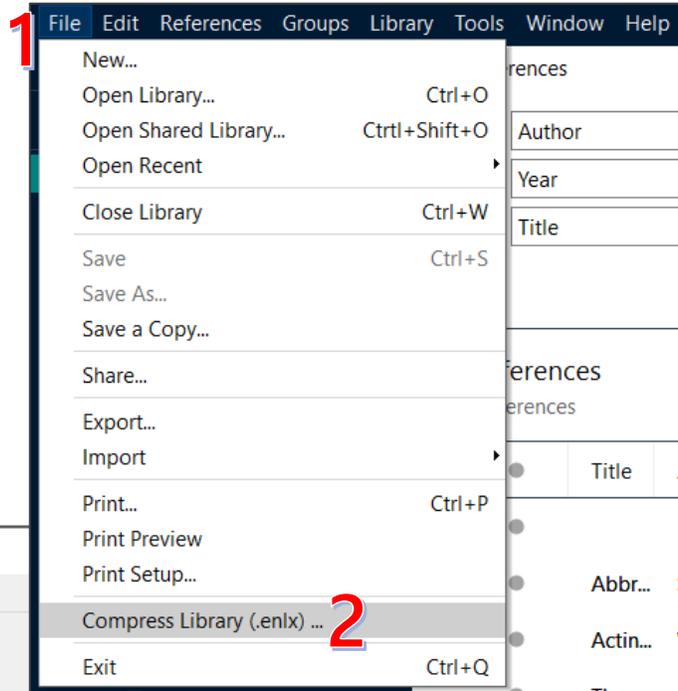
1. Open the library.
2. Open the **Edit** menu (**EndNote 20** menu for Macs).
3. Select **Preferences**.
4. Select **Libraries**.
5. From the drop-down, select **Open the specified libraries**.
6. Click the **Add open libraries** button.
7. Click the **OK** button.



Backing Up & Restoring Your Files

Create a Backup of Your Library

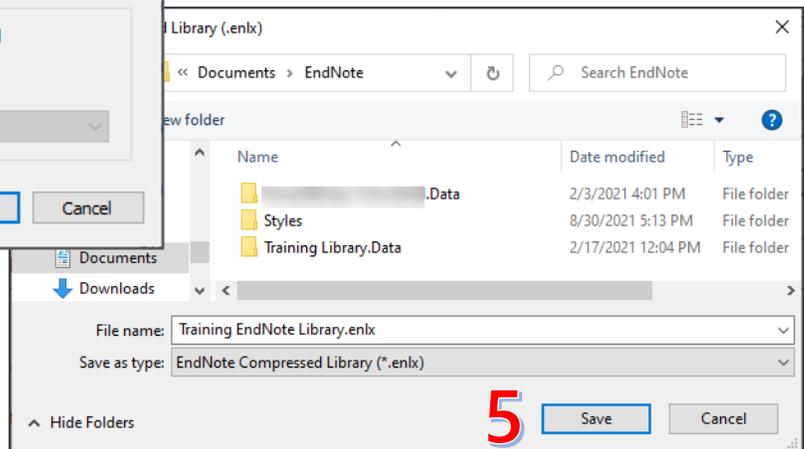
1. Open the **File** menu.
2. Select **Compressed Library (.enlx)**.
3. Use the radio buttons to determine you want to:
 1. Create a compressed library or to Create & Email the library.
 2. Save file attachments with the library.
 3. Save all references, selected references, or a specific group/group set.
4. Click the **Next** button.
5. Save the compressed library to a folder on your hard drive.



3a

3b

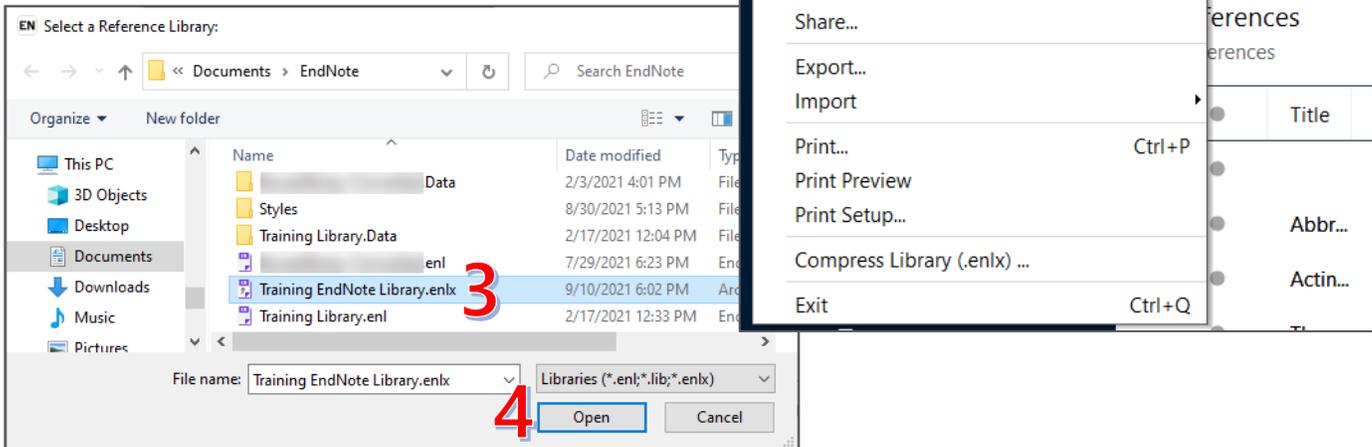
3c



To Restore a compressed Library File

1. Open the **File Menu**.
2. Click **Open Library**
3. Select the compressed library. The file will end in “.enlx”.
4. Click **Open**.

This will extract the .enl file (the library) and the .data folder to the same folder where the .enlx file is located, then open the library.



Adding References to Your Library

Integrated Online Search

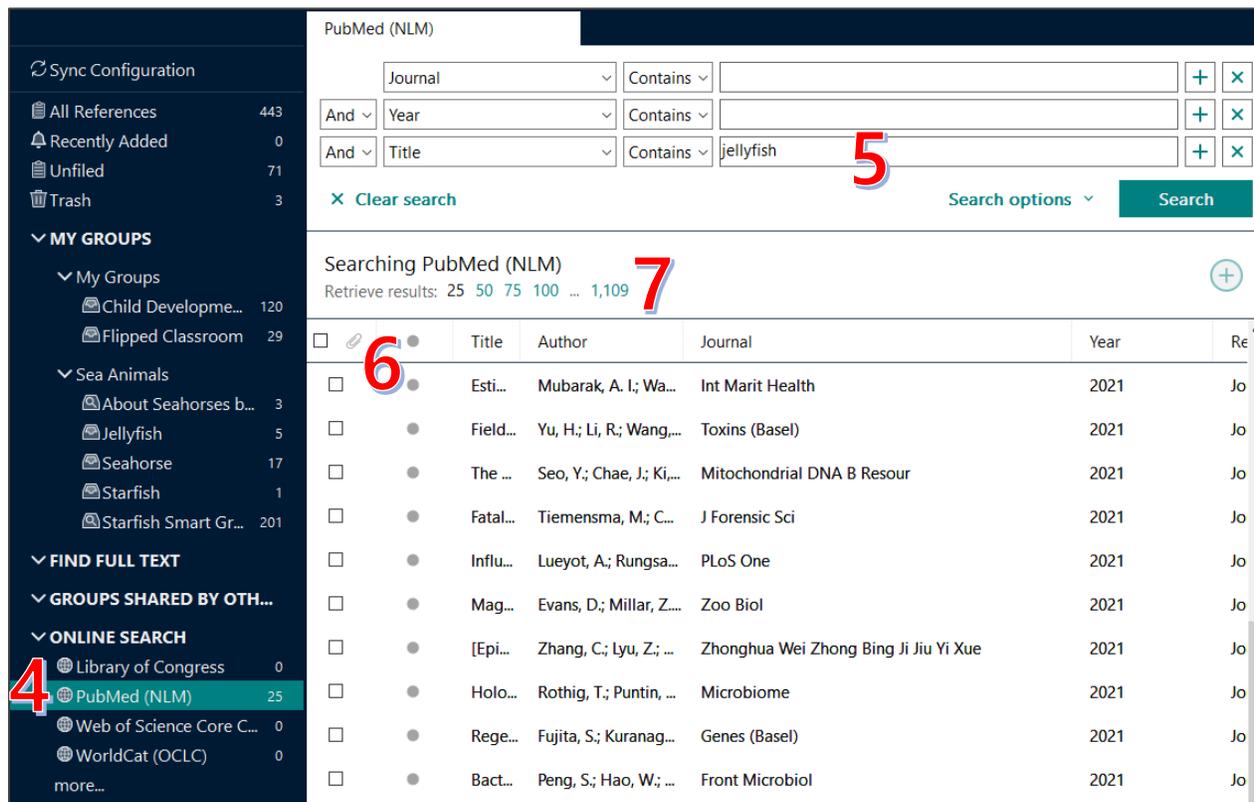
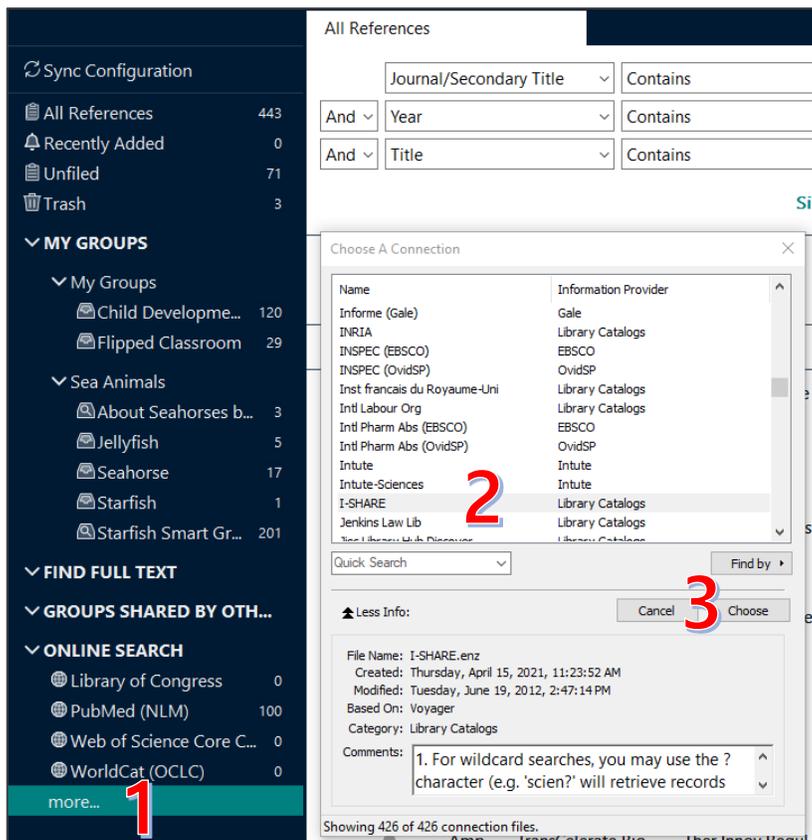
EndNote Desktop’s “Online Search” feature allows users to search & import references from several online databases directly from the EndNote interface. Available databases include PubMed, the Web of Science Core Collection, and the I-SHARE Catalog (Illinois Academic Libraries including SIUSOM), and WorldCat (a good source for books, videos, and movies). Please note that the library does not subscribe to all available databases, and some may prompt for log-in information.

To add a database to the short list that appears in the left pane:

1. Select **More**.
2. In the Choose a Connection box, scroll to the database or catalog of interest and click it.
3. Click **Choose**. The database will now appear in the shortlist.

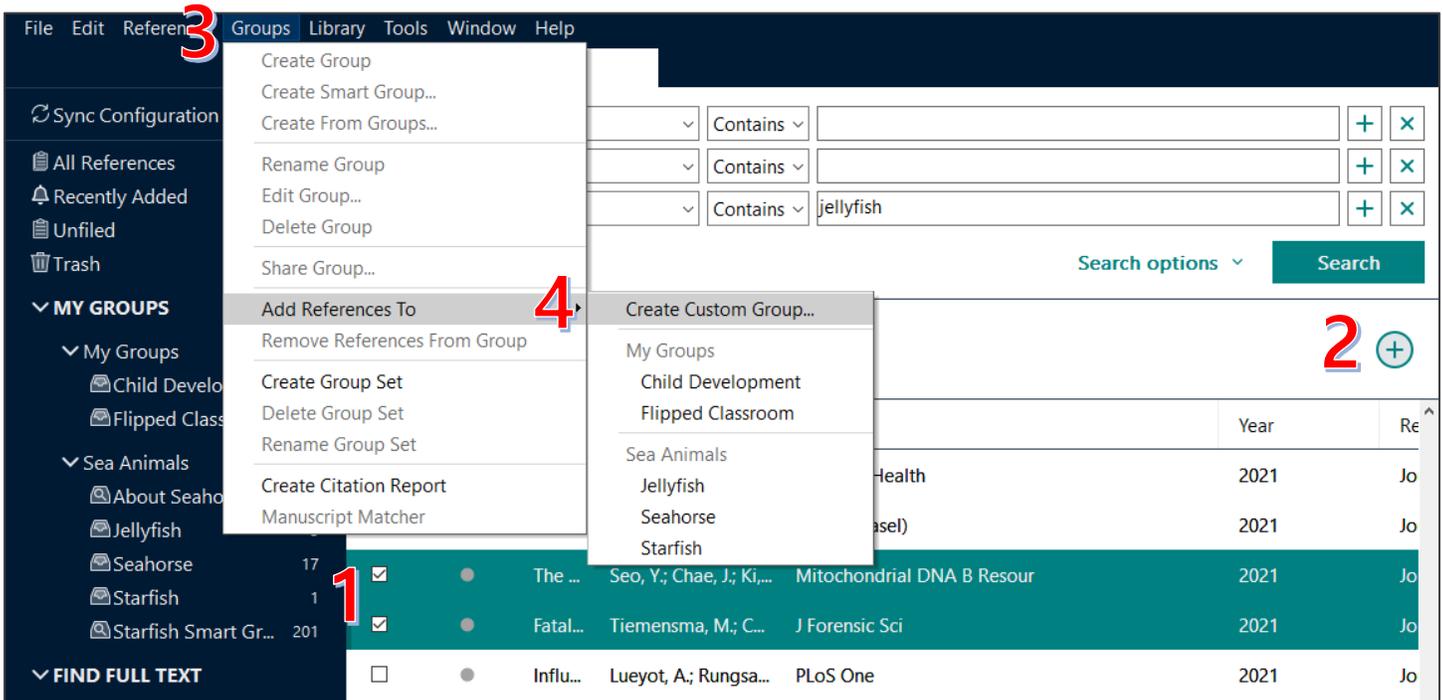
To search a database:

4. Select the database from the list.
5. Use the search box in the central pane to run your search. The available search options may differ between databases and catalogs.
6. The results of your search will appear in the central pane.
7. You can choose to display 25, 50, 75, 100, or all the search results.



To save references:

1. Check the box(es) next to the result(s) of interest
2. Click the **Copy to Local Library** icon on the toolbar (looks like a plus sign) to quickly copy the highlighted references to the All References group. OR
3. Open the **Groups** menu
4. Hover over **Add References To** and **Create a Custom Group** or add the references to an existing group.



Importing from Online Resources

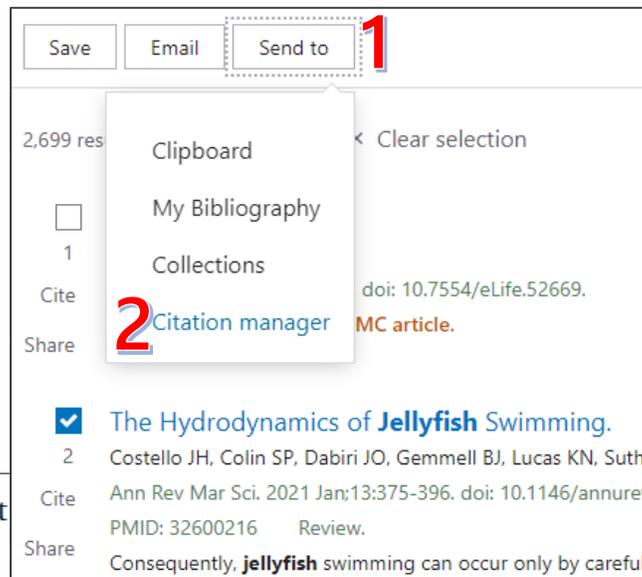
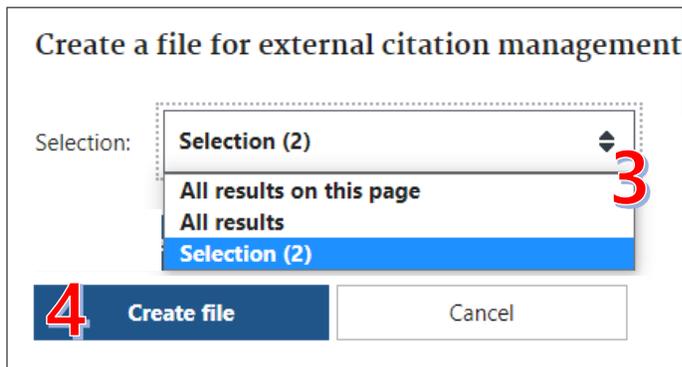
EndNote can import references from a variety of databases. This guide discusses how to export results to EndNote when searching PubMed, Web of Science, and Google Scholar. However, most databases include similar export options.

Exporting from PubMed

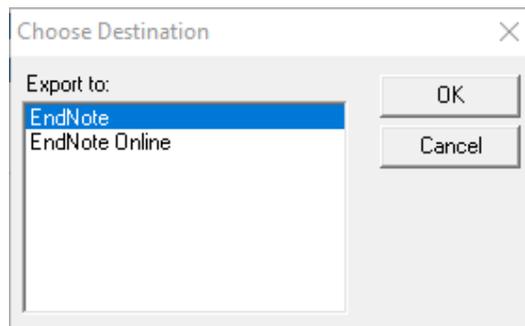
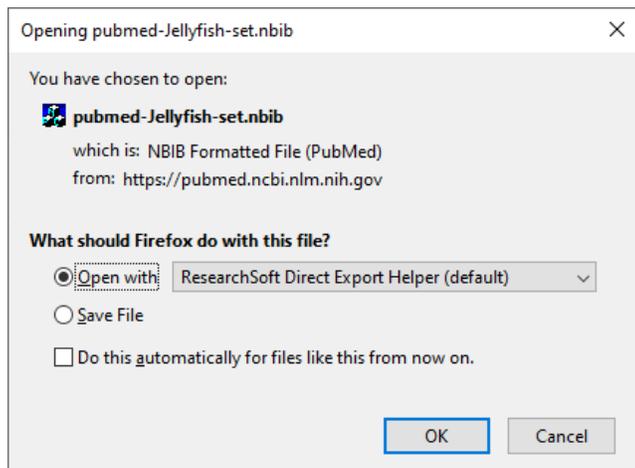
Saving Citations in PubMed for Importing into EndNote:

On the results page of PubMed:

1. Click the **Send to** button at the top of the results page
2. Select **Citation manager**.
3. Use the drop down to determine whether to export **All results on the current page**, **All results** of the search, or just a **Selection** of results (to select results, check the box next to the title).
4. Click the **Create File** button



The reference(s) will be saved as a file ending in **.nbib**. If EndNote Desktop is installed on your computer it will open directly to EndNote. This prompt may look different depending on your internet browser or computer:



Two examples of prompts to open a file into EndNote.

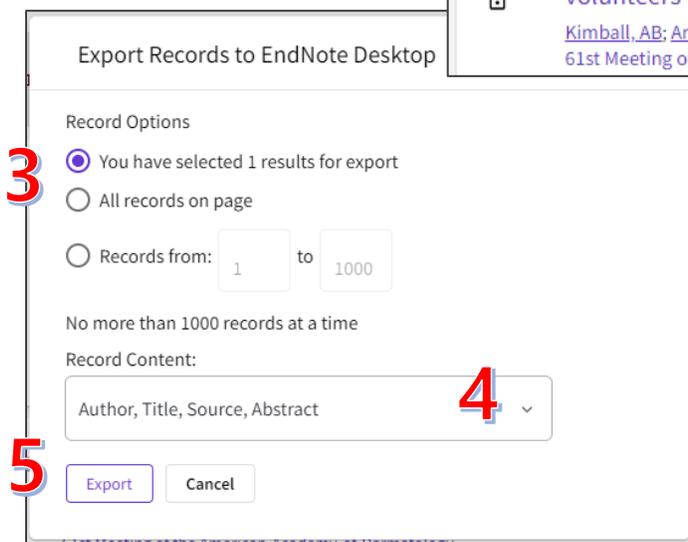
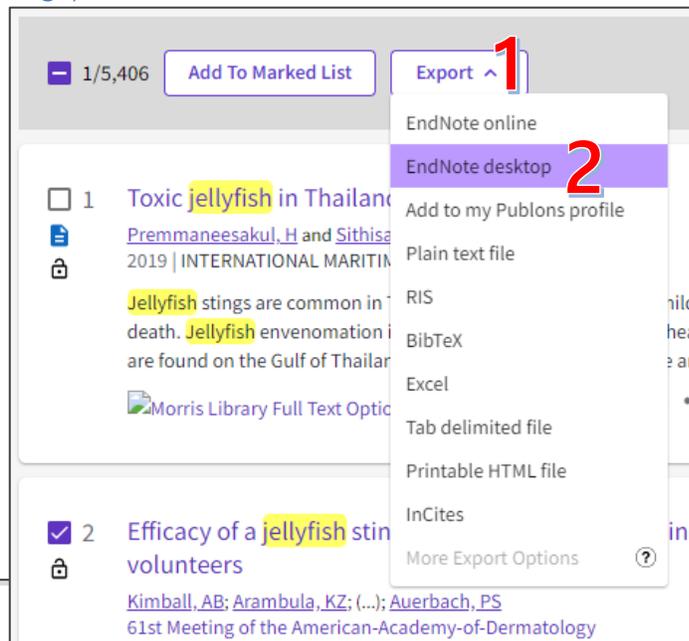
If you do not have EndNote installed on the machine or you otherwise are unable to open the file, choose to **Save File** rather than **Open File** upon download. The file will be saved on the desktop (or default for your browser) and may be imported into EndNote manually ([see page 12](#)).

Exporting from Web of Science

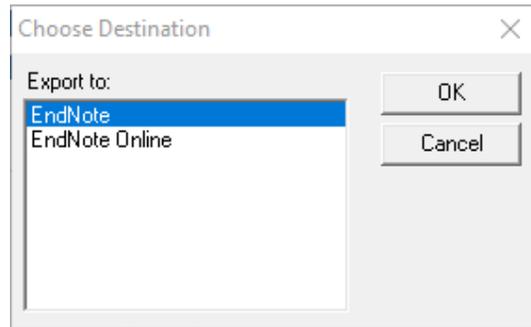
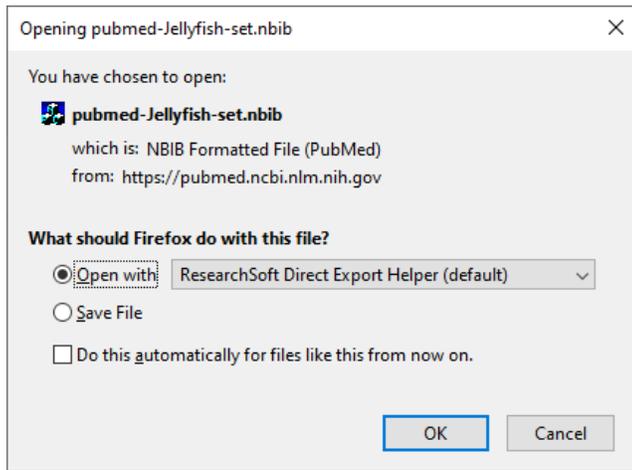
Import Citations from Web of Science (in Web of Knowledge) into EndNote or EndNote Web

On the results page of Web of Science:

1. Click the **Export** button at the top of the results page
2. Select **EndNote Desktop**.
3. Use the radio buttons to determine whether to export only articles you have selected (to select results, check the box next to the title), **All records on the current page** of results, or a range of results (to select results, check the box next to the title).
4. Use the drop-down menu to determine how much information to include in the export
5. Click the **Export** button.



The reference(s) will be saved as a file ending in **.wis**. If EndNote Desktop is installed on your computer it will open directly to EndNote. This prompt may look different depending on your internet browser or computer:



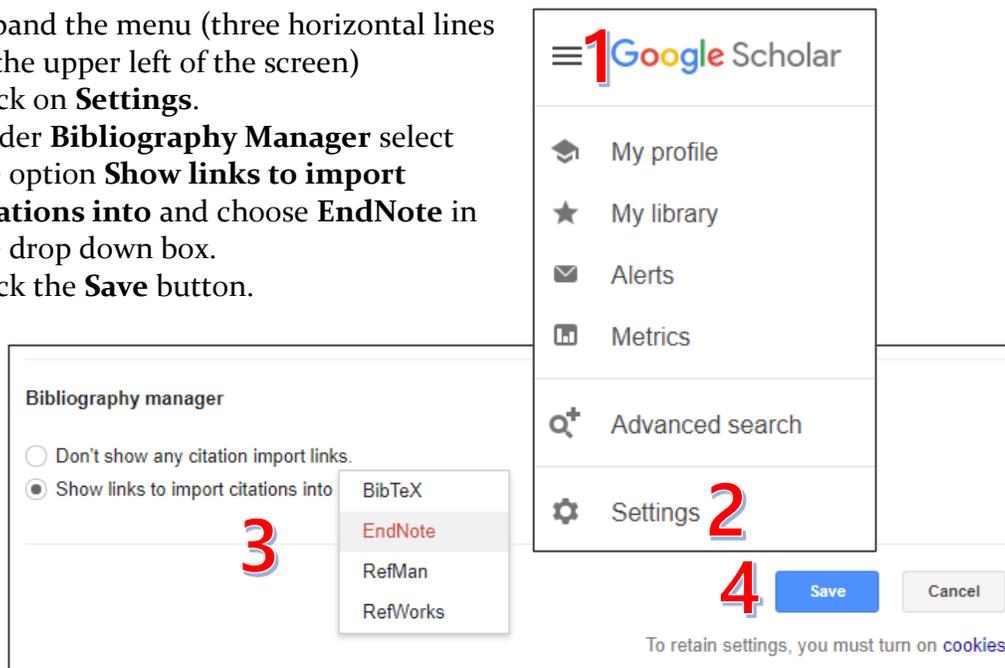
Two examples of prompts to open a file into EndNote.

If you do not have EndNote installed on the machine or you otherwise are unable to open the file, choose to **Save File** rather than **Open File** upon download. The file will be saved on the desktop (or default for your browser) and may be imported into EndNote manually ([see page 12](#)).

Exporting from Google Scholar

Google Scholar has account-level options to configure exports to bibliographic settings. Log in to your Google account, then on the Google Scholar homepage:

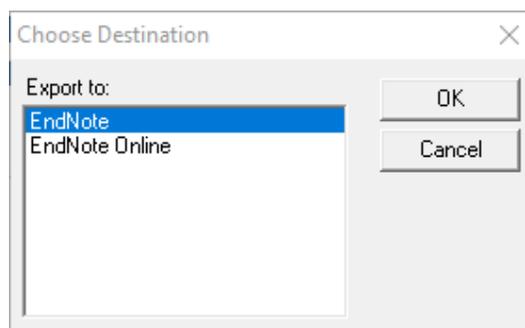
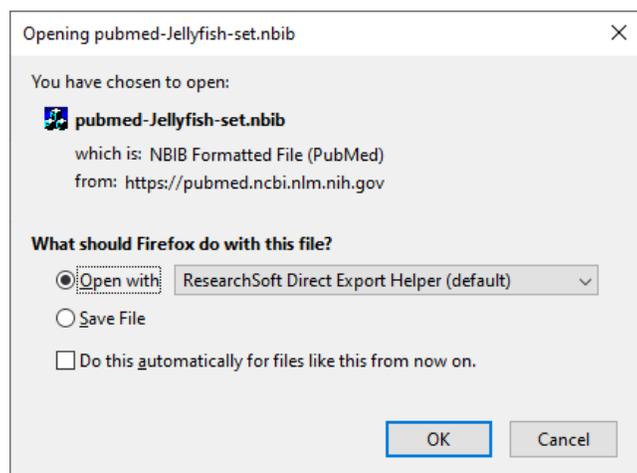
1. Expand the menu (three horizontal lines in the upper left of the screen)
2. Click on **Settings**.
3. Under **Bibliography Manager** select the option **Show links to import citations into** and choose **EndNote** in the drop down box.
4. Click the **Save** button.



After updating Bibliography Manager settings, Google Scholar results will include an option to **Import into EndNote**. References will download as an **.enw** file. Google Scholar only supports importing one citation at a time.



If EndNote Desktop is installed on your computer it will open directly to EndNote. This prompt may look different depending on your internet browser or computer:



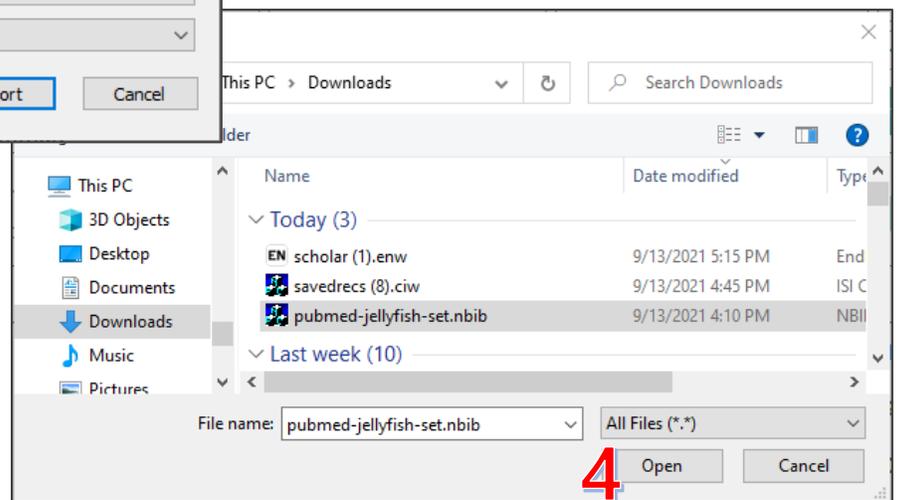
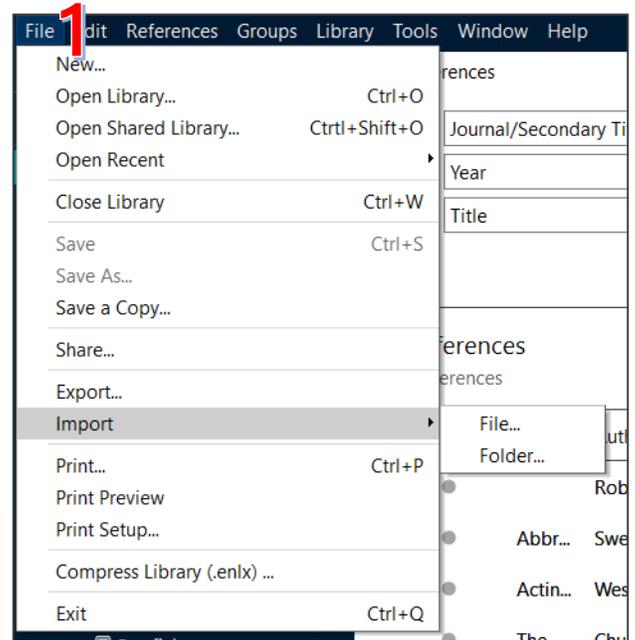
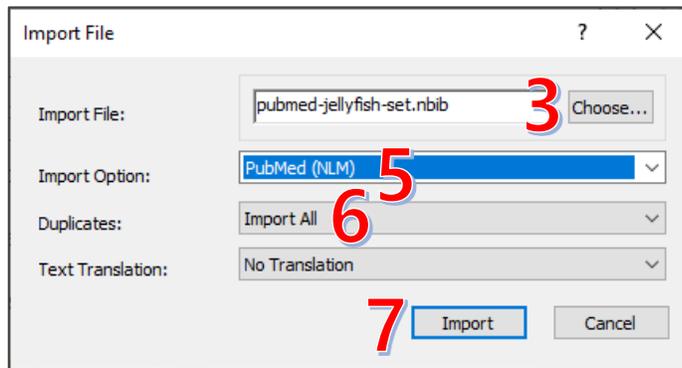
Two examples of prompts to open a file into EndNote.

If you do not have EndNote installed on the machine or you otherwise are unable to open the file, choose to **Save File** rather than **Open File** upon download. The file will be saved on the desktop (or default for your browser) and may be imported into EndNote manually ([see page 12](#)).

Importing Files to EndNote Manually

To import references saved from an online search:

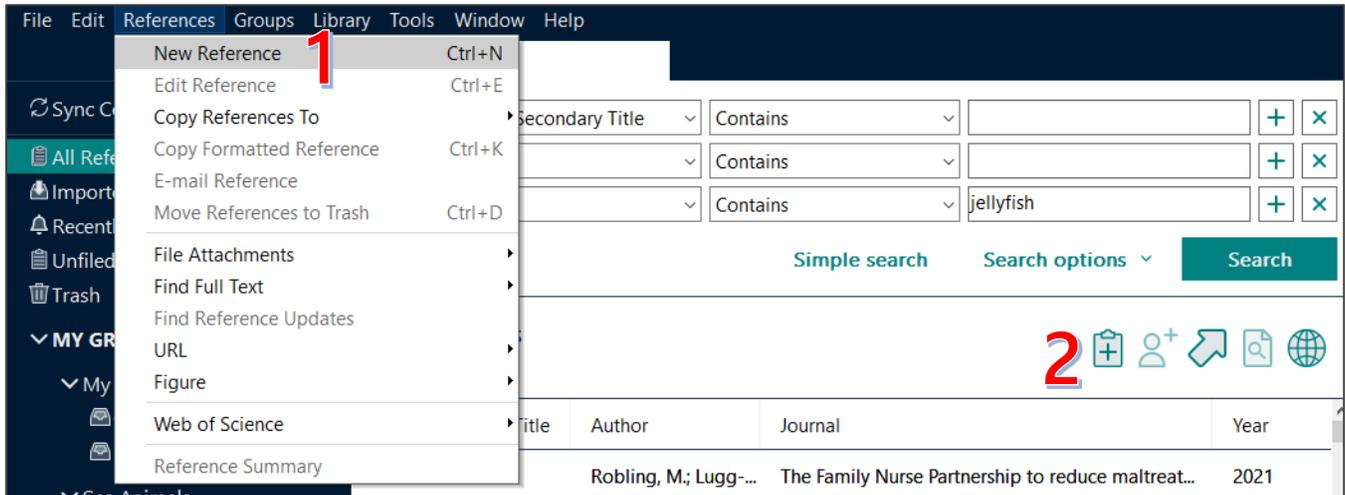
1. Open the **File** menu.
2. Hover over **Import** and select **File**.
3. Click the **Choose** button
4. Locate the saved file. Click **Open**
5. For Import Option, choose the appropriate Import Option from the drop-down. PubMed files should use the PubMed (NLM) filter. If the desired filter is not listed, choose **Other Filters** to open the complete list and find PubMed (NLM).
6. Choose the option you want for handling duplicate citations.
7. Click the **Import** button.



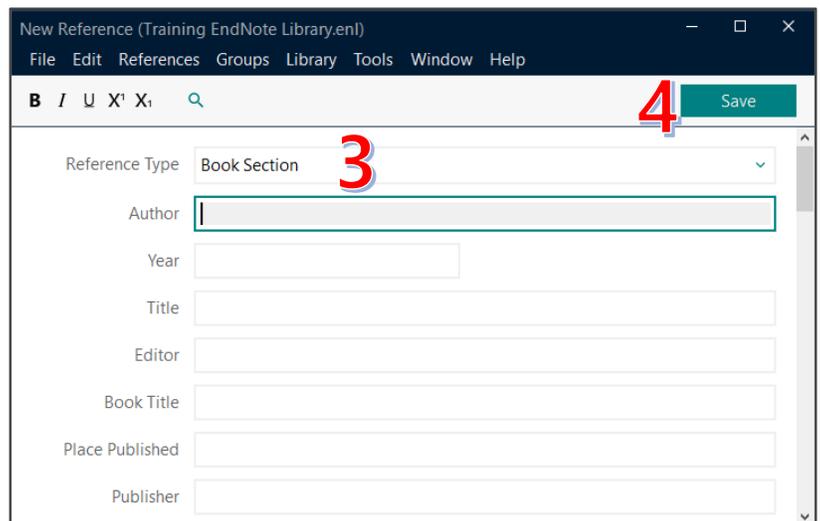
Manual Entry

It is often quicker to enter citations manually than it is to find the citation online in order to export to EndNote. This is especially true for reference types that are not typically indexed in databases (websites, book chapters, data sets, government reports, unpublished manuscripts, etc). To manually enter a citation:

1. Open the **References** menu and select **New Reference** OR
2. Click the **Add New Reference** shortcut button in the central pane (looks like a clipboard with a plus sign.)



3. In the New Reference window, use the **Reference Type** drop down to determine what type of material the reference is for.
4. Fill in as much citation information as possible for the resource.
5. Click the **Save** button.



Managing References

Editing References

The citations and bibliographies are only as accurate as the information it receives, so it is important that all reference information is correct and well-formatted. To ensure this, it is best practice to double check that imported and manually entered references are correct.

To edit a reference:

1. Select the reference in the central pane.
2. In the right pane, click the **Edit** tab.
3. Ensure the citation information is correct, including the reference type, author, volume and page information, etc.
4. Click the **Save** button.

The screenshot displays the EndNote interface. At the top, a search bar contains 'jellyfish' and a 'Search' button. Below the search bar, a table lists search results for 'Jellyfish' (5 references). The first result is highlighted in green and marked with a red '1'. To the right, the 'Edit' pane is open for the selected reference, showing fields for 'Reference Type' (Journal Article), 'Author' (The, J., Barroso, H. S., Mammone, M., Viana, M., Batista Melo, C. S., Mies, M., Banha, T. N. S., Morandini, A. C., Rossi, S., Soares, M. O.), 'Year' (2020), and 'Title' (Aquaculture facilities promote populational stability throughout). The 'Edit' button is marked with a red '2' and the 'Save' button with a red '4'.

	Journal/Secondary Title	Contains		+	x
And	Year	Contains		+	x
And	Title	Contains	jellyfish	+	x

Simple search Search options Search

Jellyfish
5 References

	Title	Author	Journal	Year
1	Aqu...	The, J.; Barroso, H. ...	Mar Environ Res	2020
	Bay ...	Rowley, O. C.; Cou...	PLoS One	2020
	Dani...	Mohan Prakash, R...	Toxicol Lett	2020
	Field...	Xu, N. W.; Townse...	Biomimetics (Basel)	2020
	Jellyf...	Amreen Nisa, S.; V...	Int J Biol Macromol	2021

The, 2020 #518 Summary Edit x

B / U X' X₁ Q Save 4

Reference Type Journal Article

Author The, J.
Barroso, H. S.
Mammone, M.
Viana, M.
Batista Melo, C. S.
Mies, M.
Banha, T. N. S.
Morandini, A. C.
Rossi, S.
Soares, M. O.

Year 2020

Title Aquaculture facilities promote populational stability throughout

Research Notes

1. note 1
2. note 2
3. note 3

The **Edit** section contains a **Research Notes** field you can use to make notes about the reference (key points, summaries, relevance to your project, etc). This field is searchable from the central pane, making it easy to find specific references when you need them:

A screenshot of the search filter dropdown menu. The 'Research Notes' option is highlighted in blue. Other options include 'Journal/Secondary Title', 'Custom 8', 'Accession Number', 'Call Number', 'URL', 'Author Address', 'Caption', 'DOI', 'File Attachments', 'Translated Author', 'Translated Title', 'Name of Database', 'Database Provider', 'Language', 'Access Date', 'Added to Library', and 'Last Updated'.

Attaching Files

You can attach files to references as attachments. This feature is most often used to attach article full text, but you could also attach notes files, figures, data sets, etc.

To attach a file:

1. Select the reference in the central pane.
2. In the right pane, click the **Summary** tab.
3. Click the **Attach File** button.
4. Locate the file. Click Open.

A screenshot of a file selection dialog box titled 'Select a file to link to the reference'. The 'Look in:' dropdown is set to 'Desktop'. The file 'Bay Watch.asp.pdf' is selected. The 'Open' button is highlighted with a red '4'.

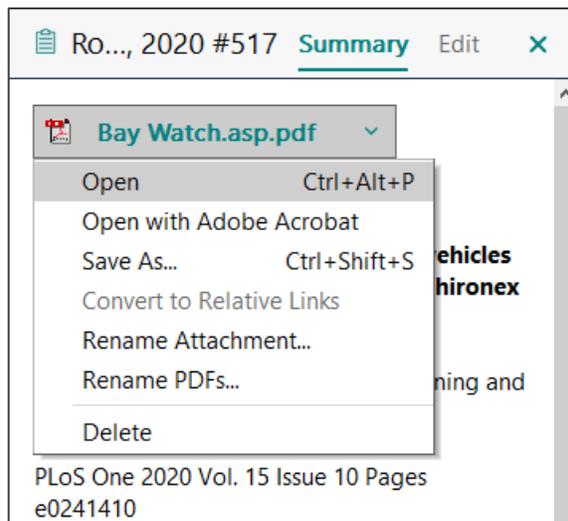
A screenshot of the EndNote interface. The search results pane shows a table with columns 'Title', 'Author', 'Journal', and 'Year'. The row for 'Bay watch: Using unmanned aerial vehicles (UAV's) to survey the box jellyfish Chironex fleckeri' is highlighted with a red '1'. The right pane shows the 'Summary' tab for this reference, with the '+ Attach file' button highlighted with a red '3'.

Title	Author	Journal	Year
Aqu...	The, J.; Barroso, H. ...	Mar Environ Res	2020
Bay ...	Rowley, O. C.; Cou...	PLoS One	2020

Bay watch: Using unmanned aerial vehicles (UAV's) to survey the box jellyfish Chironex fleckeri
 O. C. Rowley, R. L. Courtney, S. A. Browning and J. E. Seymour
 PLoS One 2020 Vol. 15 Issue 10 Pages e0241410
 Accession Number: 33119724 PMCID: PMC7595306 DOI: 10.1371/journal.pone.0241410

The file will appear on the **Summary** tab. To open or modify an attachment

1. Click the arrow next to the attachment name.
2. Select the appropriate function or program.

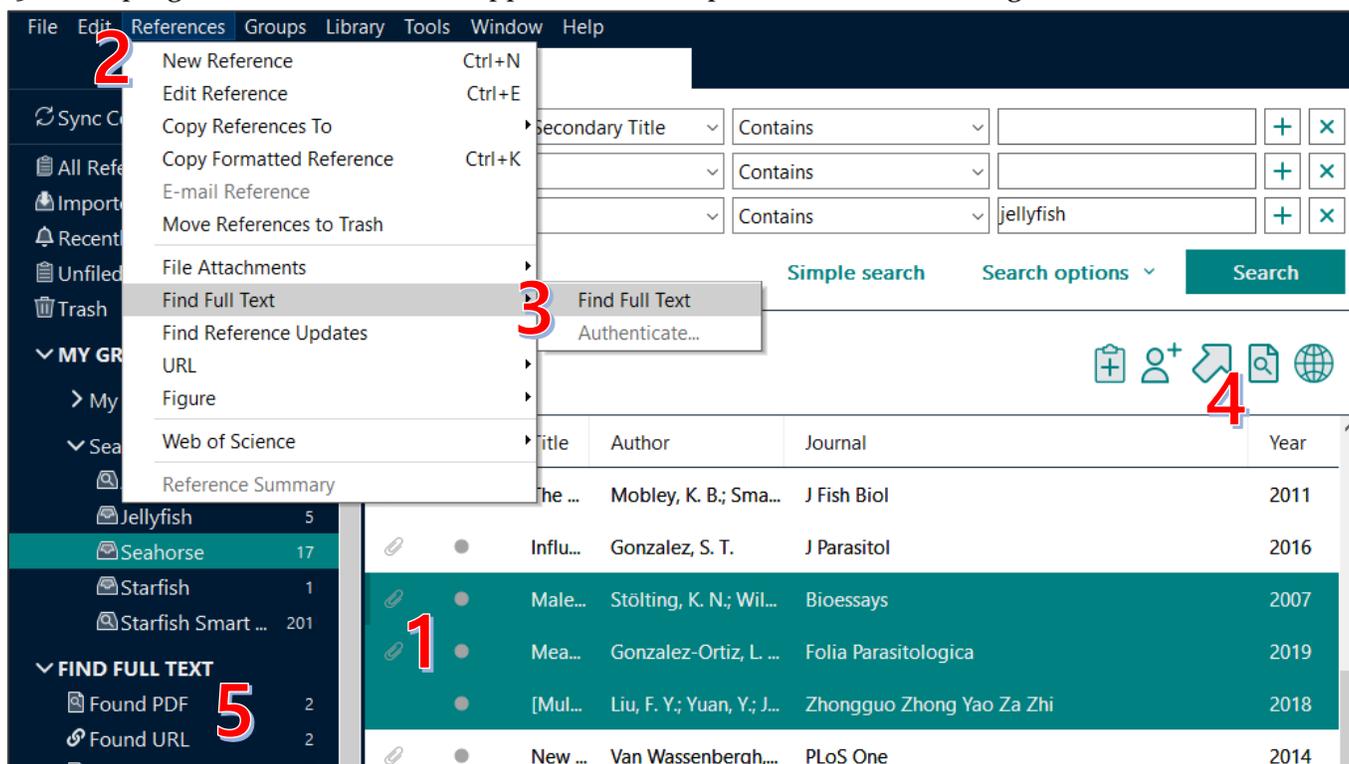


Find Full Text

EndNote's Find Full Text feature will look for article full text online. Where it is available for free, EndNote will automatically attach the full text. Where not available for free, EndNote will fill the URL field with the web address where the article is available for purchase. EndNote will not automatically attach full text for articles the SIUSOM Library has access to through paid resources.

To use the Find Full Text Tool:

1. Select the article(s) or groups in which you are interested in finding full text. You can select multiple articles by holding down the CTRL (Command for Mac users) and clicking each.
2. Open the **References** menu
3. Hover over **Find Full Text** and select **Find Full Text**. OR
4. Click the **Search the web for full text documents** shortcut button located in the central pane toolbar. It looks like a sheet of paper with a magnifying glass.
5. The progress of the search will appear in the left pane under the heading **Find Full Text**.

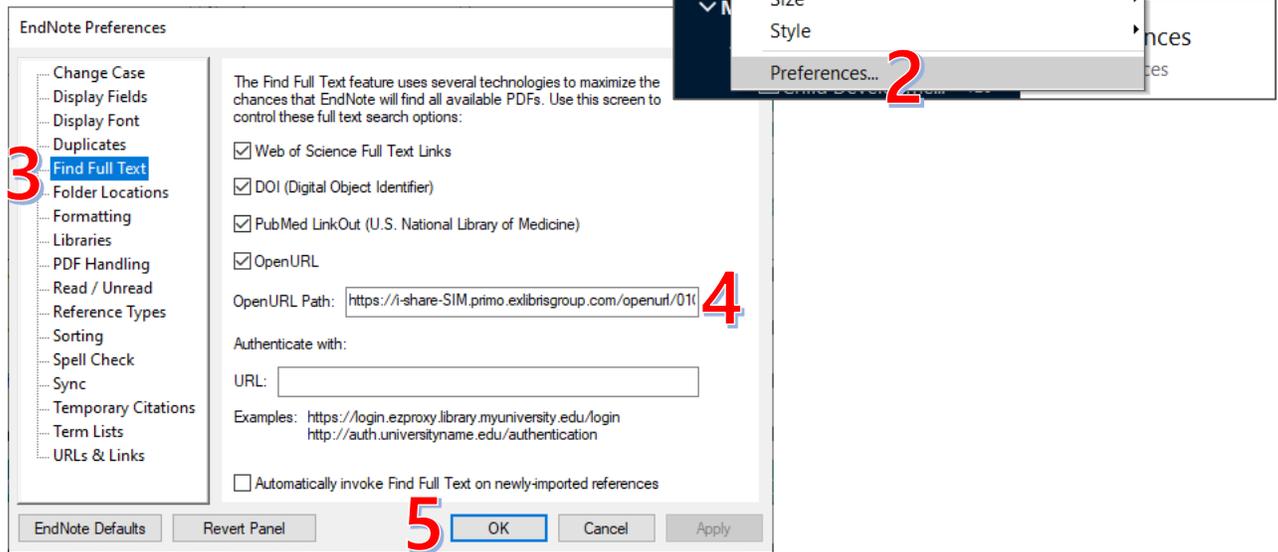


Open URL Links

EndNote uses Open URL to locate resources online. You can connect Open URL with the SIUSOM's holdings in order to determine whether the Library has access to a resource through our paid subscriptions.

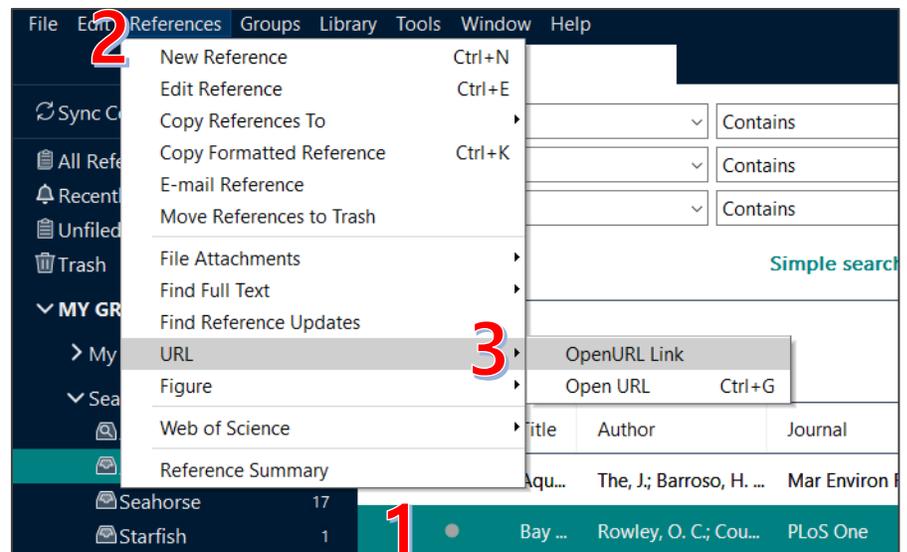
To set up the Open URL Link:

1. Open the **Edit** menu (**EndNote** menu for Macs).
2. Select **Preferences**.
3. Select **Find Full Text**.
4. In the **OpenURL Path** box enter https://i-share-SIM.primo.exlibrisgroup.com/openurl/01CARLI_SIM/01CARLI_SIM:CARLI_SIM?
5. Leave the **Authenticate with URL** blank.
6. Click the **OK** button.



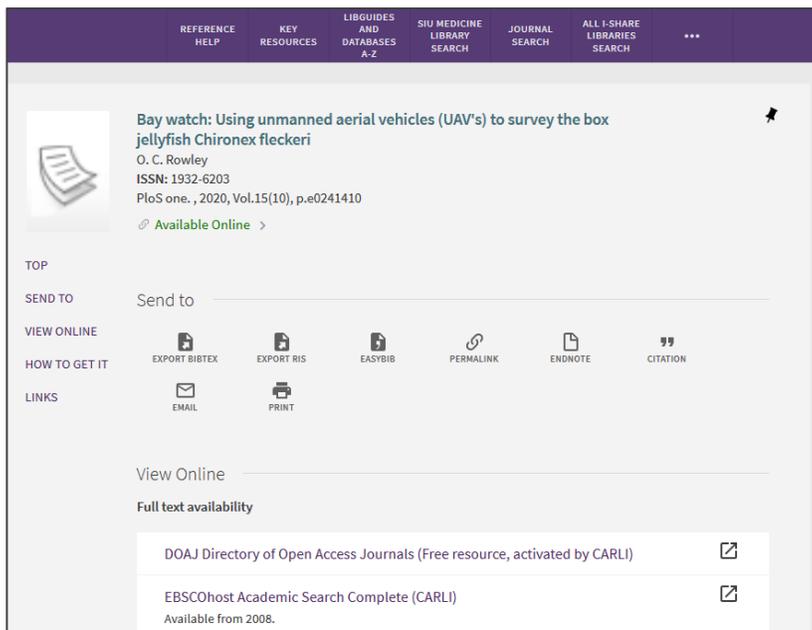
To use the Open URL Link to check the Library's access:

1. Select the reference you are interested in.
2. Open the **References** menu.
3. Hover over **URL** and select **OpenURL Link**.



This will open the SIUSOM Library's Primo Page, displaying the options for access.

For more information on finding article full text and navigating the Primo page, see the [Finding Full Text research guide \(https://libguides.siumed.edu\)](https://libguides.siumed.edu).



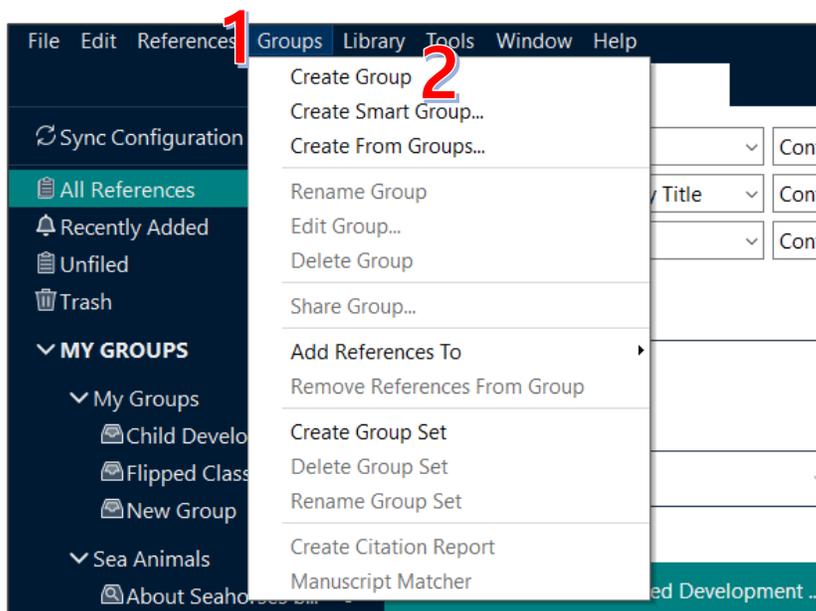
Groups

As a library grows larger, it may be helpful to organize references using Groups and Group Sets. By default, EndNote libraries have groups called All References, Recently Added References, Unfiled (anything not sorted into a custom group), and Trash. You can add the same reference in multiple groups without needing to add the reference to the library multiple times.

Groups

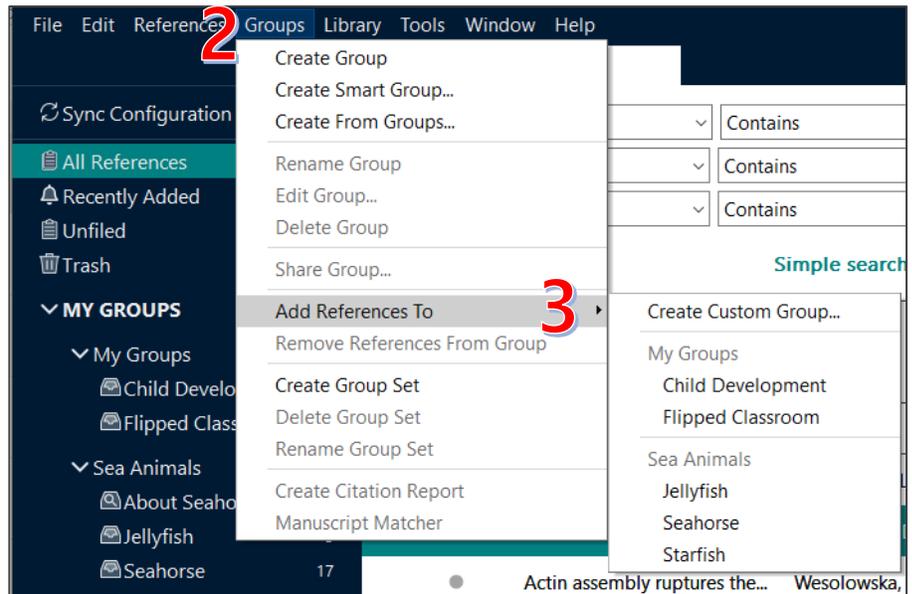
To create a group:

1. Open the **Groups** menu.
2. Select **Create Group**.
3. Type in the name for the new group
4. Hit the **Enter** key on your keyboard.



To add references to a group;

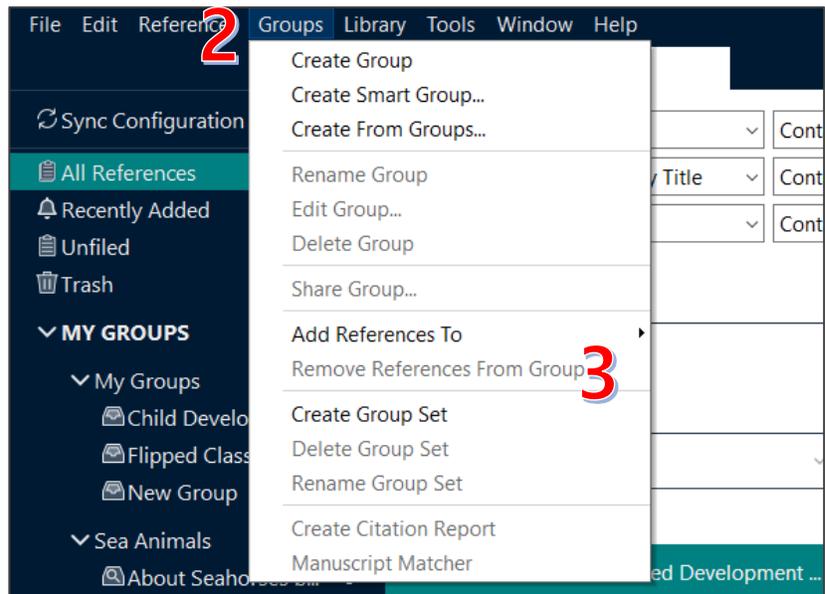
1. Select the reference(s) to be moved. You can select multiple references by holding down the CTRL (Or Command) key while selecting.
2. Open the **Groups Menu**.
3. Hover the cursor over **Add References To** in order to display the groups list and select the appropriate group.



Alternatively, you can click the reference and, while continuing to hold down the mouse button, drag the references to the appropriate group in the left pane list.

To remove a reference from a group without removing it from the library:

1. Select the reference(s) to remove.
2. Open the **Groups** menu.
3. Select **Remove References from Group**.



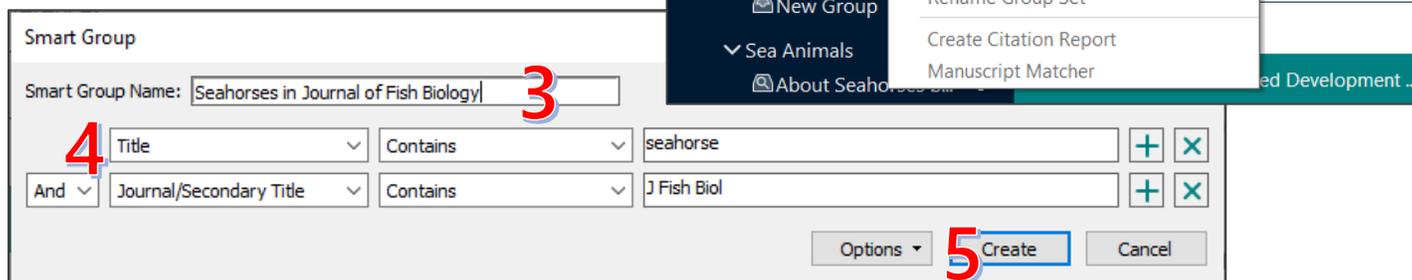
Smart Groups

Smart groups are groups with set criteria. When a reference that meets the criteria of a smart group is added to the library it is added to the group automatically. Smart groups are denoted by a magnifying glass icon:



To create a smart group:

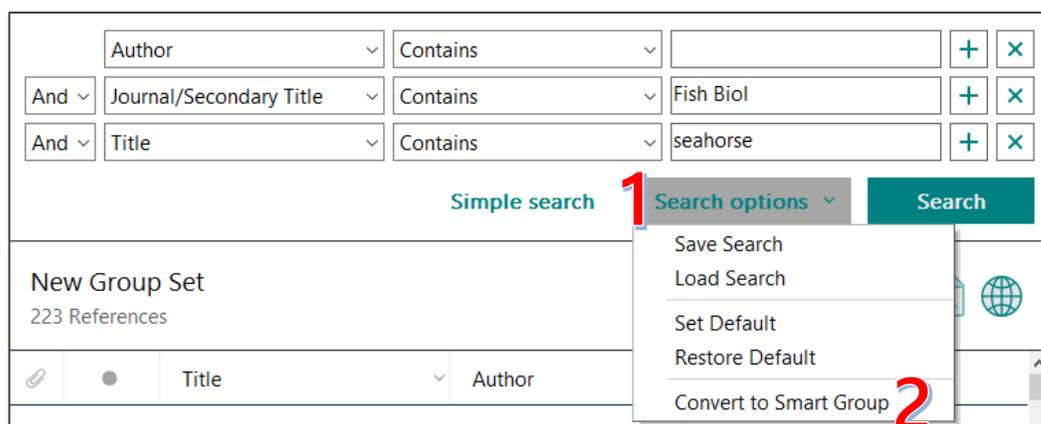
1. Open the **Groups** menu.
2. Select **Create Smart Group**.
3. In the Smart Group window type in the name for your smart group.
4. Use the dropdown menus and text boxes to set the criteria for the smart group. In the pictured example, we will create a group for articles with the word “seahorse” in the title that were published in the journal “J Fish Biol.”
5. Click the **Create** button.



Any references in your library that meet your criteria will be added to the smart group.

Alternatively, an existing search may be converted to a smart group:

1. Expand the **Search options** button.
2. Select **Convert to Smart Group**.

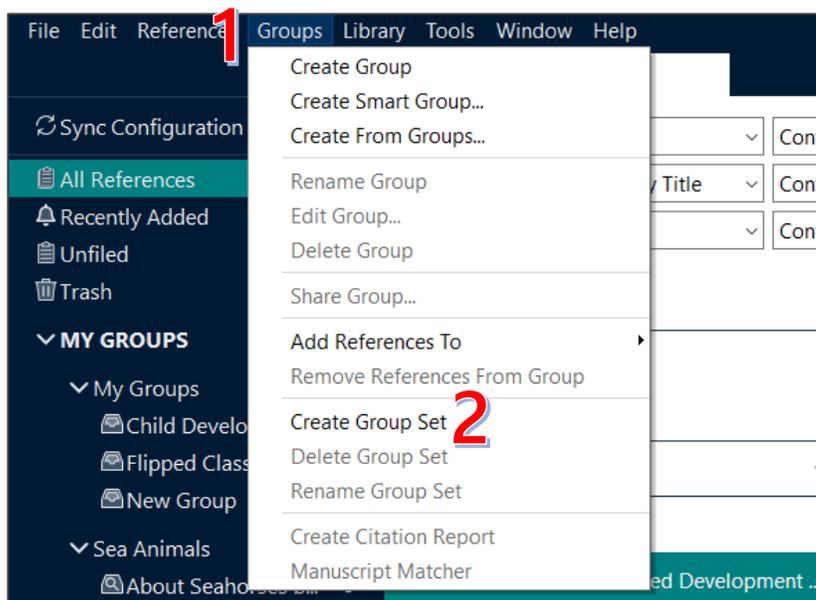
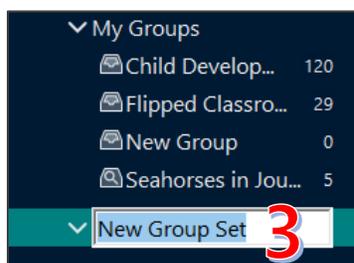


Group Sets

Group sets give another level of organization to your groups. By default, EndNote libraries have one group set titled My Groups.

To create a group set:

1. Open the **Groups** menu.
2. Select **Create Group Set**.
3. Type in the name for the new group set.
4. Hit the **Enter** key on your keyboard.



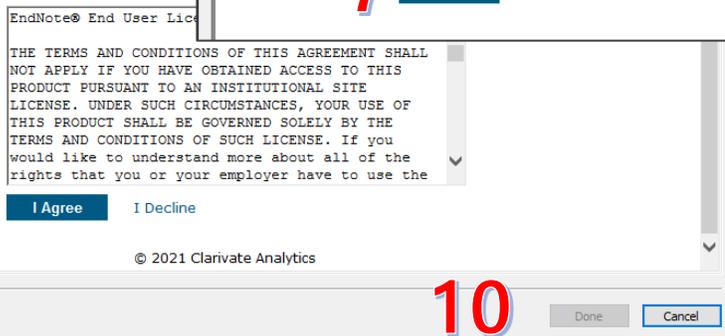
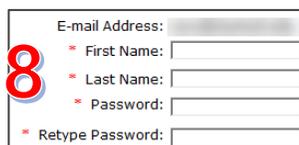
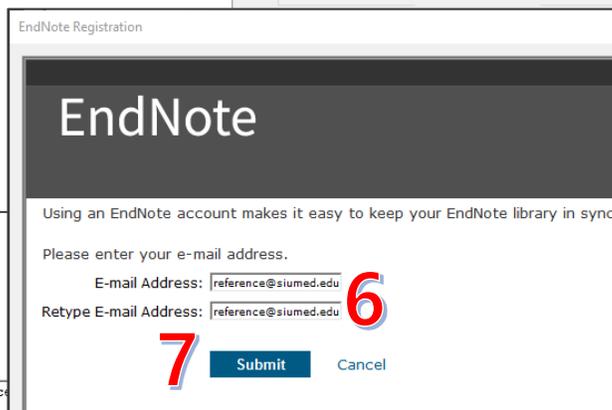
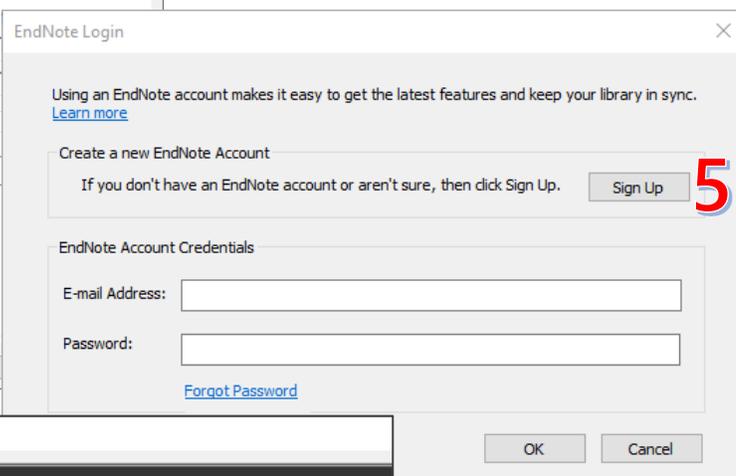
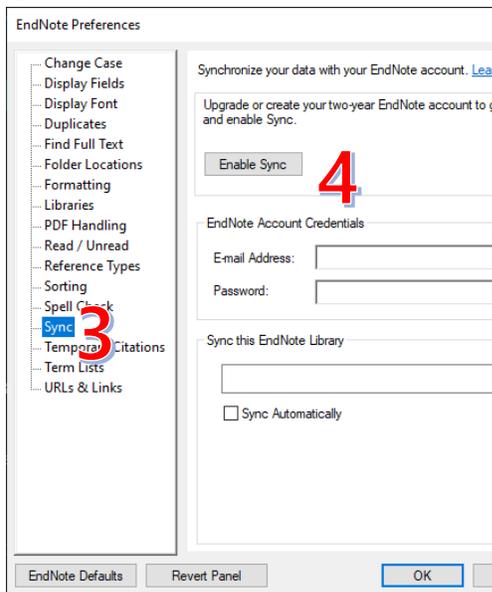
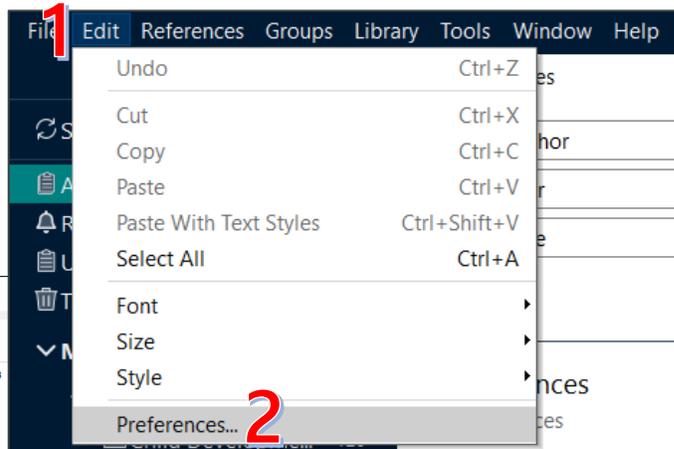
Syncing with EndNote Online

EndNote Online is the cloud version of EndNote. Syncing an EndNote library with EndNote Online allows users to access and update their EndNote library when working from a device without EndNote Desktop installed. EndNote Online also allows for sharing groups or entire libraries with other EndNote users ([see page 24](#)). Please note that only one library may be synced with an EndNote Online account. Syncing multiple libraries to the same EndNote Online account will merge the libraries into one.

Creating an EndNote Online Account

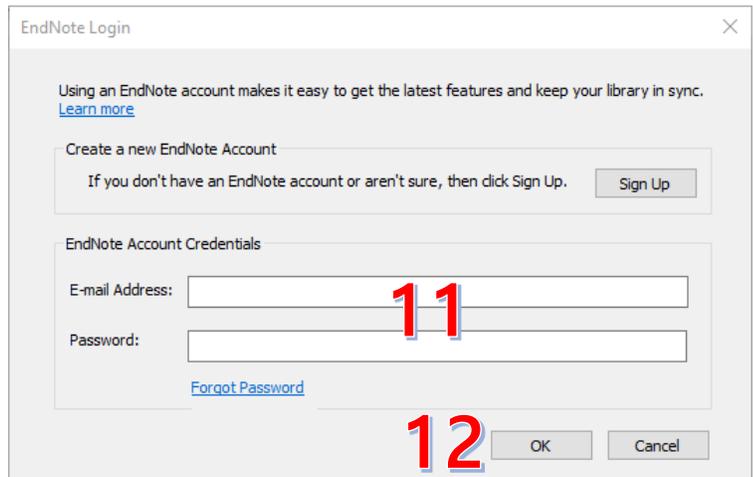
The first step to syncing a library is to create an EndNote Online account. EndNote Online is free, but EndNote Desktop licenses include features such as expanded EndNote Online storage limits. To create an EndNote account associated with your EndNote Desktop license:

1. Open the **Edit** menu (**EndNote** menu for Macs).
2. Select **Preferences**.
3. Select **Sync**.
4. Click the **Enable Sync** button.
5. In the EndNote Login window, click the **Sign Up** button.



6. Enter and retype the email address to be associated with your account.
7. Click the Submit button.
8. Follow the prompts in the EndNote Registration window to create an account. Accounts require, your name, and a password.
9. Read the EndNote license agreement and click the **I Agree** button to create the account.
10. Click the **Done** button to exit the registration window.

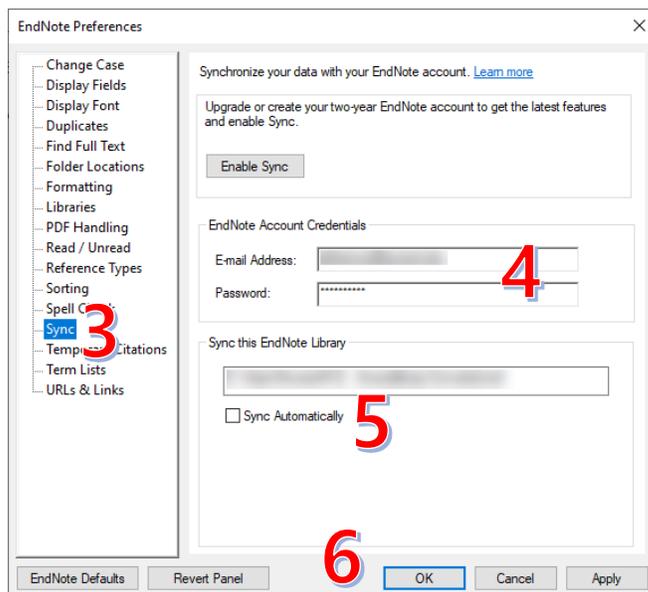
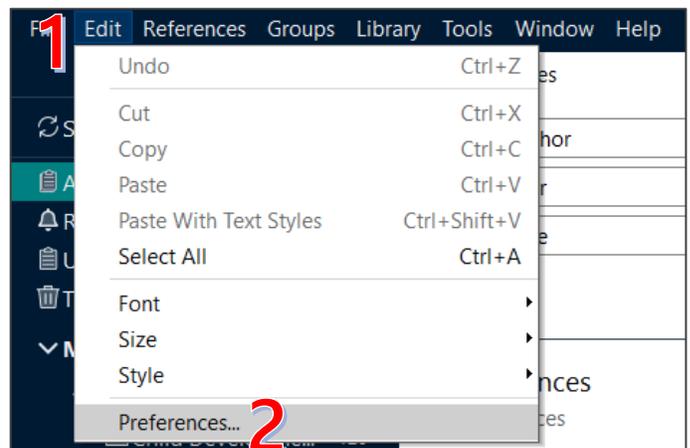
- In the EndNote Login window, enter the log in information for your EndNote account.
- Click the **OK** button. It may take a while for new accounts to clear. If you receive an error message concerning account credentials, wait an hour or two and try again.



Setting up Sync Preferences

To connect EndNote Desktop with an EndNote account:

- Open the **Edit** menu (**EndNote** menu for Macs).
- Select **Preferences**.
- Select **Sync**.
- Enter your EndNote account credentials
- If you would like EndNote Desktop to sync with EndNote Online every time it opens, tick the “Sync Automatically” box.
- Click **OK**.



Multiple EndNote Desktop licenses may be associated with the same EndNote account, however, every EndNote account has only one EndNote Online library.

Syncing Your Library

If you regularly work on multiple computers, it makes sense to sync your EndNote Desktop library at the beginning and end of each session to ensure your library stays up to date. To sync a library:

The screenshot shows the EndNote Desktop interface. On the left, the 'Sync Status' button is highlighted with a red '1'. In the center, the 'Sync now' button is highlighted with a red '2'. On the right, the 'Library' menu is open, and the 'Sync' option is highlighted with a red '3'. The 'Sync Status' window shows the last sync date as Wednesday, February 10, 2021, and the sync status as 'There are changes that need to be synced'. The 'Sync Details' window shows the error code and message: 'Local Library'.

1. Click the **Sync Status** button in the left pane. If you are working with a library different from that which is synced to your EndNote Online account, this will instead say **Sync Configuration**.
2. Click the **Sync Now** button. OR
3. Open the **Library** menu and select **Sync**.

Syncing will take several minutes, especially if there have been many changes to the library since the last sync.

Collaboration and Sharing

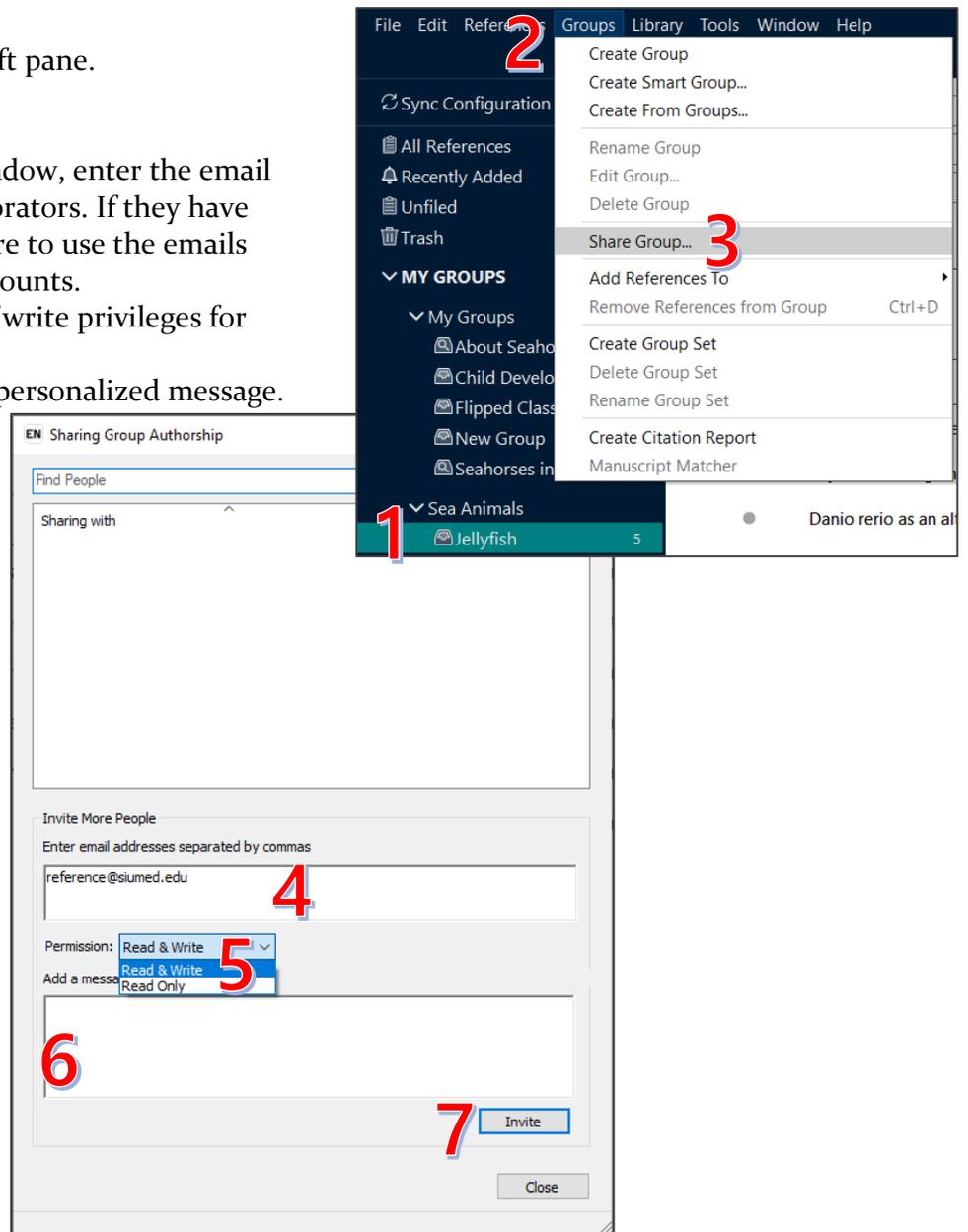
Many projects involve collaboration. It is possible to share entire libraries or select groups with other EndNote users, and to share references with collaborators using other bibliography managers via export files such as RIS or XML:

Sharing Groups	Sharing Libraries	Sharing Export Files
<ul style="list-style-type: none"> • All collaborators must have an EndNote Online account. (Clarivate offers a free version of EndNote Online with limited storage space). • Shares references, but not attachments. • Shared folders are visible in the EndNote Desktop left pane, but open in EndNote Online <p>Best For: <i>Collaborating with people who do not have EndNote Desktop but are open to creating and using an EndNote Online account.</i></p>	<ul style="list-style-type: none"> • All collaborators must have EndNote Desktop. • Users can only share the library associated with their EndNote Online account. • Shares references and attached files. <p>Best for: <i>Collaborating with other EndNote Desktop users.</i></p>	<ul style="list-style-type: none"> • Can be imported to most other reference managers. • Will not sync; any updates must be entered manually or through additional exports. • Shares references but not attachments. <p>Best for: <i>Sharing static groups of references with collaborators who do not wish to use the EndNote ecosystem.</i></p>

Sharing Groups

To share a group:

1. Select the group in the left pane.
2. Open the **Groups** menu.
3. Select **Share Group**.
4. In the Sharing Group window, enter the email address(es) of the collaborators. If they have EndNote accounts, be sure to use the emails associated with those accounts.
5. Assign read-only or read/write privileges for collaborators.
6. You can choose to add a personalized message.
7. Click the **Invite** button.



To remove a collaborator from a shared group:

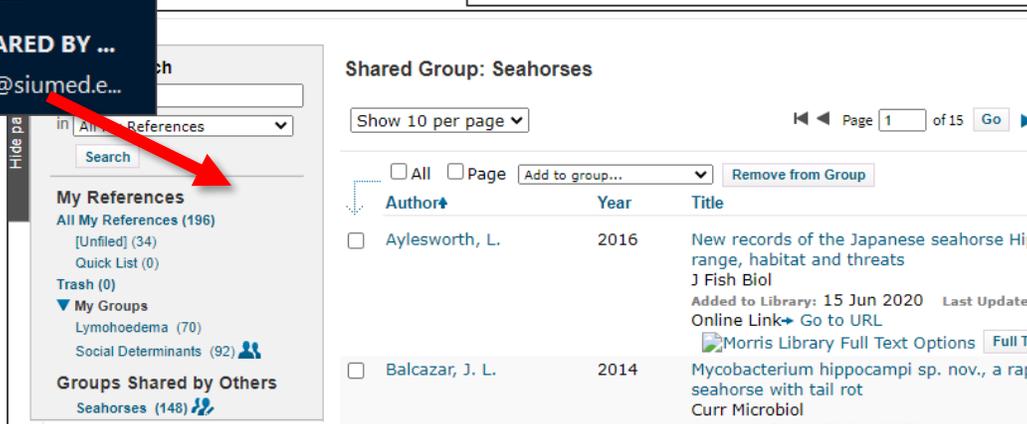
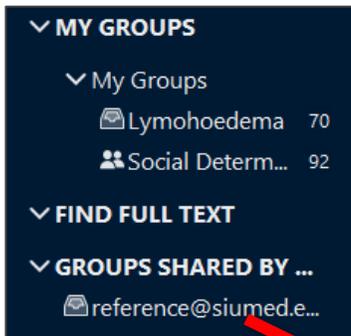
1. Open the Sharing Group window (see above).
2. Click the gear icon next to the name of the collaborator to be removed.
3. Select **Remove**.

The collaborator will receive an e-mail informing them that their access to the group has been removed.



If a group is shared with you, you will receive an email notification from noreply@endnote.com with instructions on how to access the shared resource.

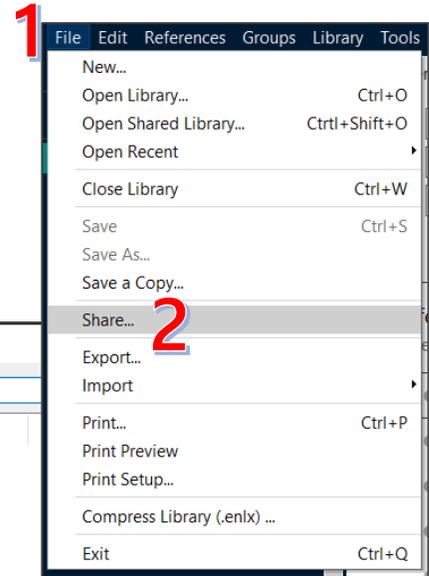
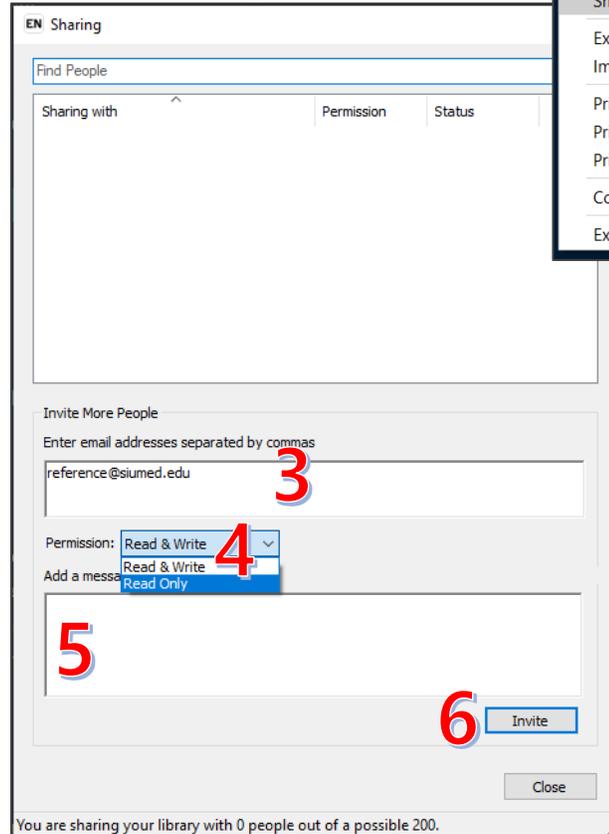
Groups shared with you will appear in the left pane under the section **Groups Shared by Others**. Selecting the group will open an internet browser and go to EndNote Online where you will be able to view the full group:



Sharing Libraries

To share the currently open library:

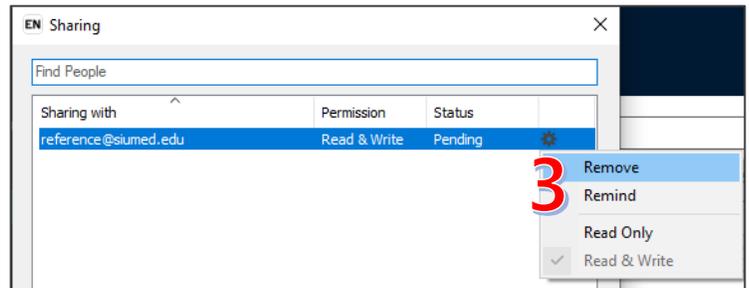
1. Open the **File** menu.
2. Select **Share**.
3. In the Sharing window, enter the email address(es) of the collaborators. Be sure to use the emails associated with their EndNote accounts.
4. Assign read-only or read/write privileges for collaborators.
5. You can choose to add a personalized message.
6. Click the **Invite** button.



To remove a collaborator from a shared library:

1. Open the Sharing menu (see above).
2. Click the gear icon next to the name of the collaborator to be removed.
3. Select **Remove**.

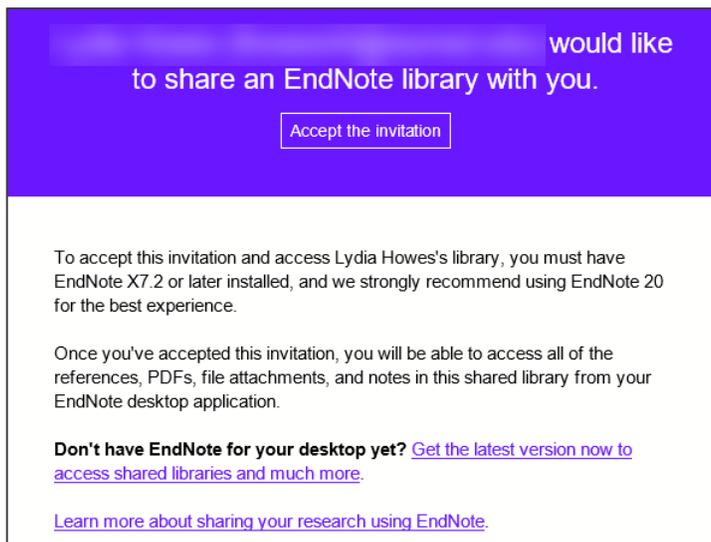
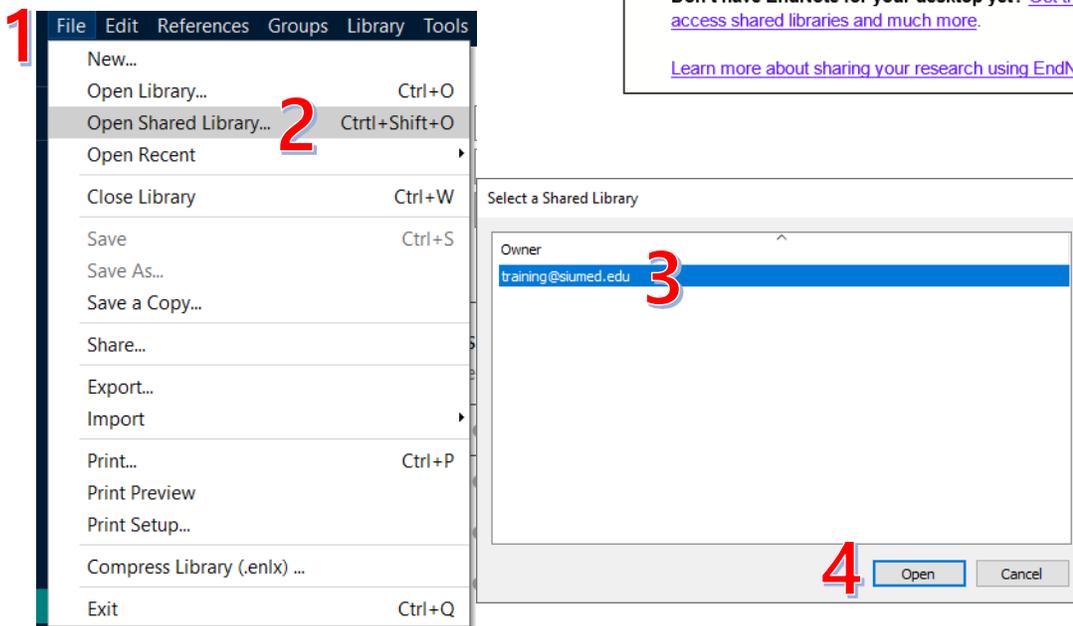
The collaborator will receive an email informing them that their access to the library has been removed.



If a library is shared with you, you will receive an email notification from noreply@endnote.com with instructions on how to access the shared resource.

To open a library that has been shared with you:

1. Open the **File** menu
2. Select **Open Shared Library**
3. Select the appropriate library from the list of libraries shared with you.
4. Select **Open**.

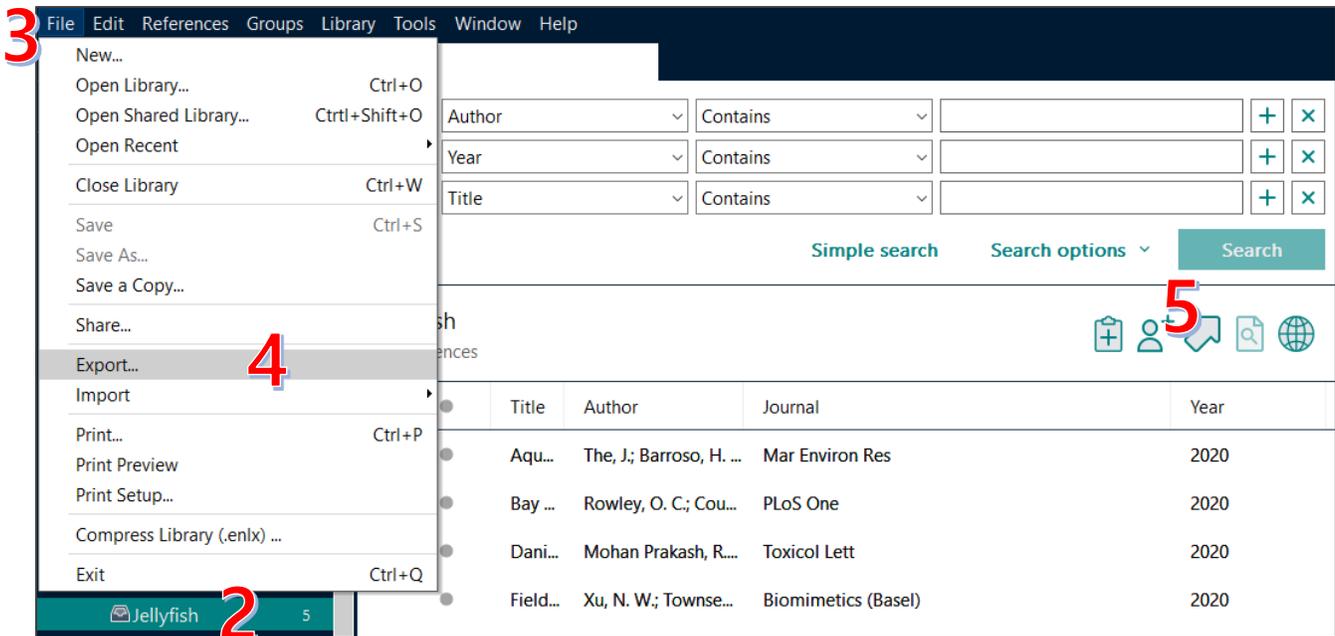


The library will open in a new window. Future EndNote 20 updates will open shared libraries in a new tab rather than a new window.

Sharing Export Files

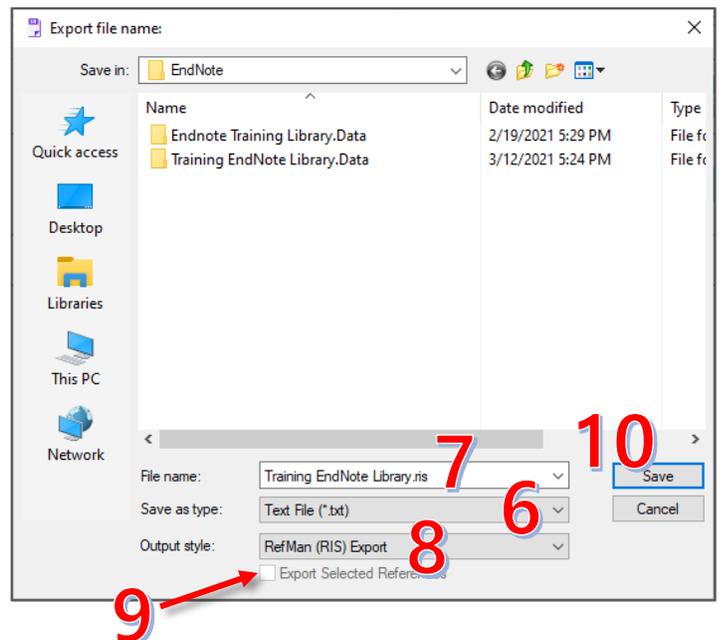
To export references to a file that can be imported into other bibliography managers:

1. Ensure that the output style **Refman (RIS) Import** is in the output style short list ([see page 30](#)).
2. Select the references or group of references you would like to include in the bibliography. You can select multiple articles by holding down the CTRL (Command for Mac users) key and clicking each.
3. Open the **File** menu
4. Select **Export** OR
5. Click the **Export** shortcut button in the center pane toolbar (looks like an arrow pointing to the upper right)



6. Navigate to the folder where you want to save the file and, from the Save as type drop down, select **text file**.
7. Enter the file name, making sure the file ends in .ris (filename.ris).
8. From the Output Style drop down select **Refman (RIS) Export**.
9. If you only want the references you selected to appear in the list, tick the **Export Selected References** button. Otherwise, you will export whichever group is currently selected.
10. Click the **Save** button.

The RIS file can be imported to most bibliography managers.



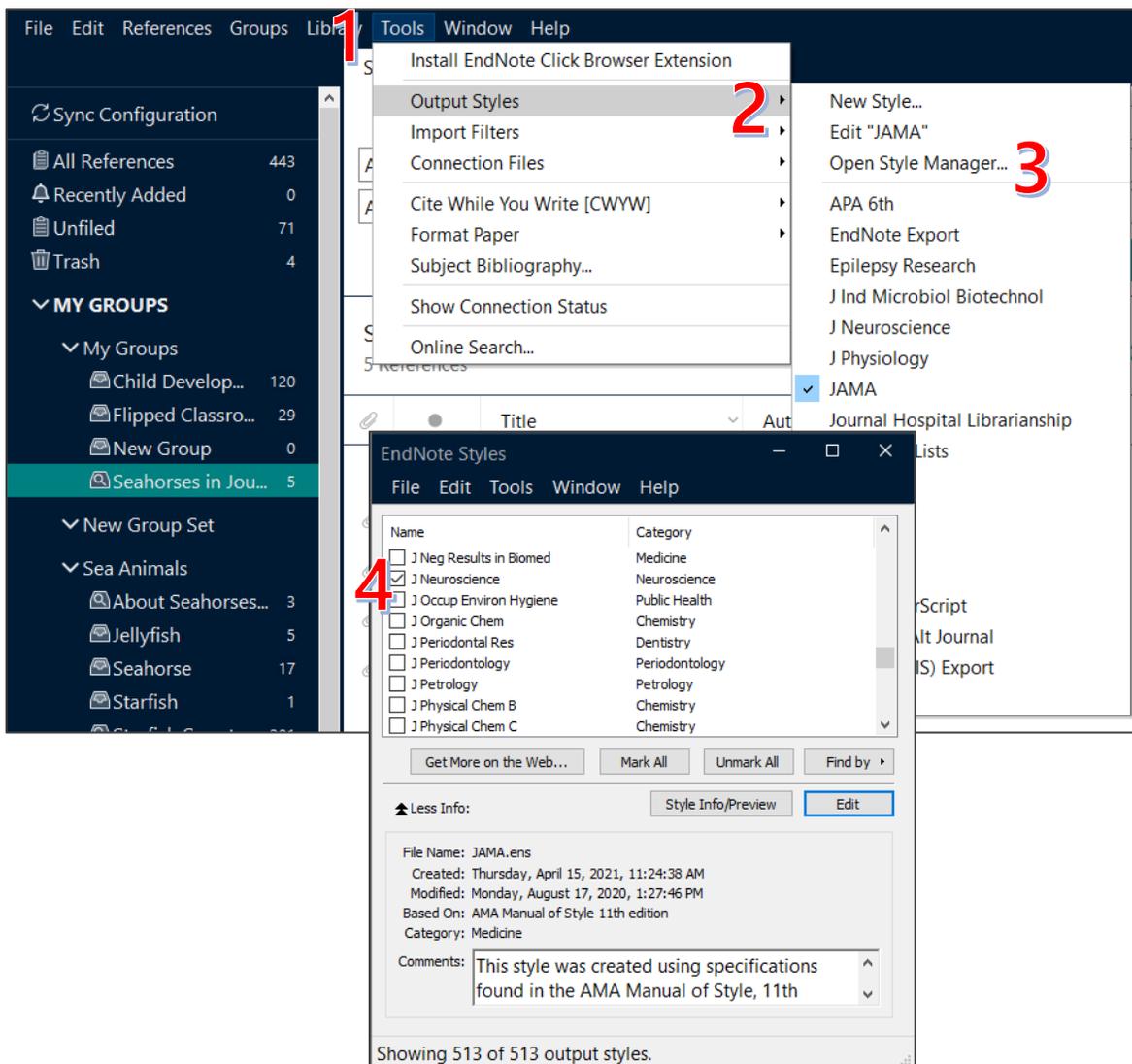
Creating Citations

Output (Citation) Styles

EndNote Desktop installs hundreds of output styles to choose from, with hundreds more available to download from the website. Some styles commonly used in the biomedical sciences include AMA (called JAMA in EndNote), NLM, and NIH. If you are submitting a manuscript to a specific journal, there may be an existing output style for the journal.

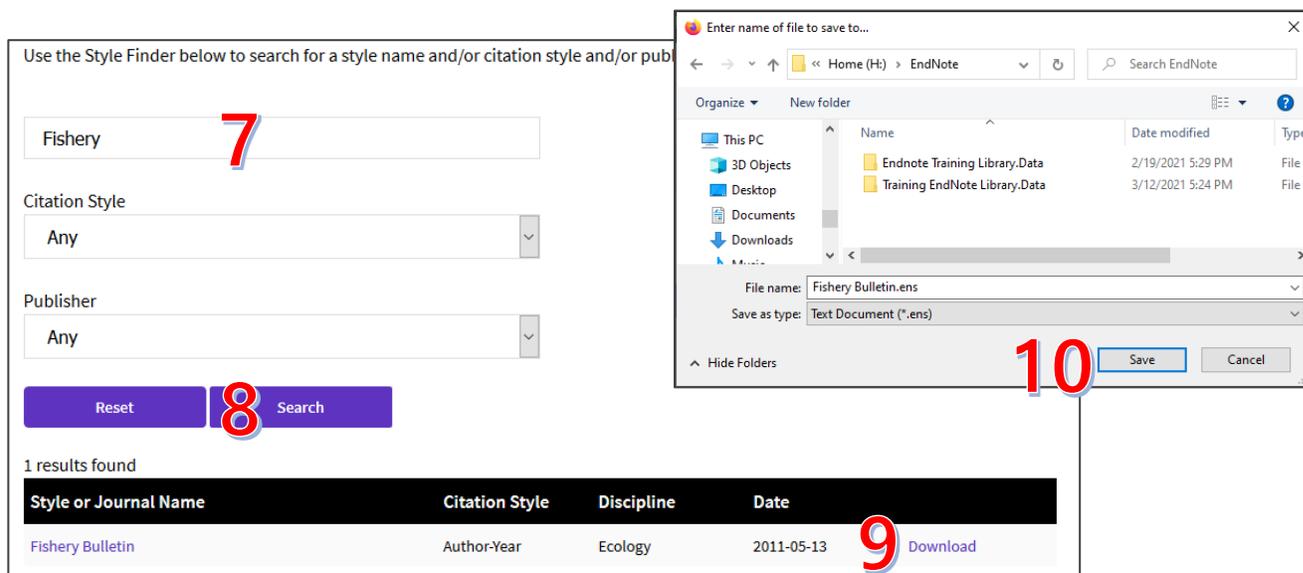
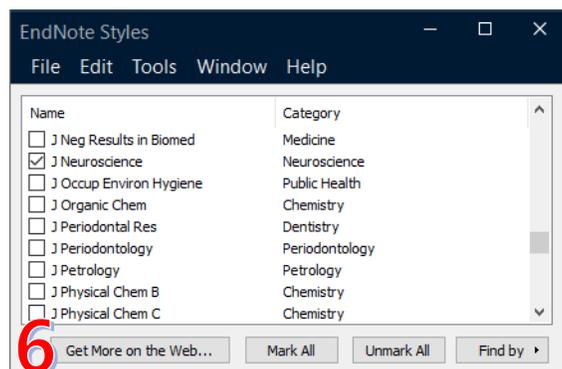
When selecting a style for a citation or bibliography, only those in the shortlist will appear as an option. To add output styles to your shortlist:

1. Open the **Tools** menu
2. Hover over **Output Styles**. The bottom portion of this menu contains the current shortlist.
3. Select **Open Style Manager**.
4. The Style Manager window lists all installed output styles. Check the box next to the name to add the style to the shortlist.
5. Close the Style Manager window. The style will now be in the shortlist.

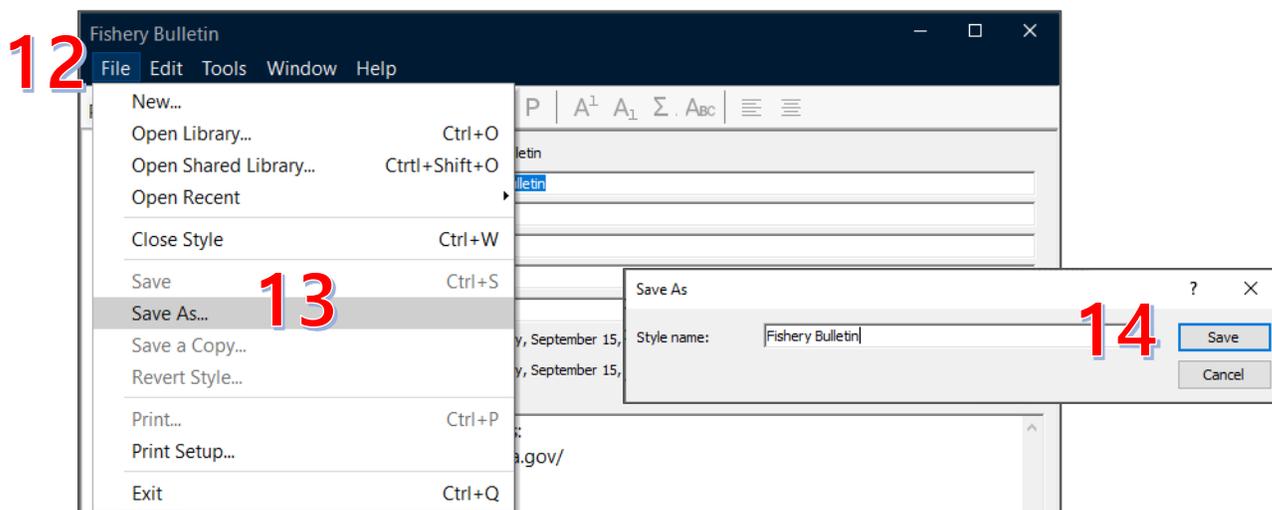


If an appropriate style is not in the style manager, you can download the style from the EndNote website:

6. In the Style Manager window, click the **Get More on the Web** button. This will open an internet browser window.
7. Enter the name of the style or journal you are looking for in the search box of the Style Finder.
8. Click the **Search** button.
9. Click the **Download** link to save the appropriate file.
10. Save the file in your EndNote folder.



11. Open the EndNote style file (ends in **.ens**). It should open in EndNote automatically in a separate window.
12. In the styles window, open the **File** menu.
13. Select **Save As**.
14. Check the name of the style and click the **Save** button.



Single Citation

To copy a single citation:

1. Select the reference of interest.
2. Select the **Summary** tab in the right pane. The lower portion of the pane contains the citation for the selected reference.
3. Use the drop down to select the appropriate output citation style from the shortlist. [See page 30](#) for instructions on adding output styles to the shortlist.
4. Click the **Copy** button.
5. You can now paste the citation wherever it's needed.

The screenshot shows the EndNote interface. On the left, a list of references is displayed. Reference 1 is selected: "A. L.; Su... Am J Prev Med". A red number '1' points to this entry. On the right, the 'Summary' tab is active, showing details for the selected reference. A red number '2' points to the 'Summary' tab. Below the title, there is a dropdown menu for citation styles, with 'JAMA' selected. A red number '3' points to this dropdown. To the right of the dropdown is a 'Copy citation' button, with a red number '4' pointing to it.

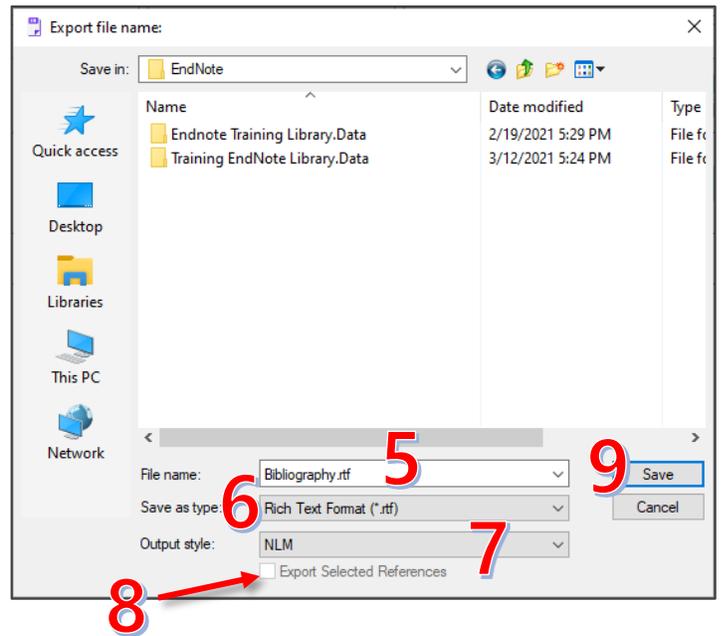
Stand Alone Bibliography

To generate a citation list or stand-alone bibliography as a Word document:

1. Select the references or group of references you would like to include in the bibliography. You can select multiple articles by holding down the CTRL (Command for Mac users) and clicking each.
2. Open the **File** menu
3. Select **Export OR**
4. Click the **Export** shortcut button in the center pane toolbar (looks like an arrow pointing to the upper right).

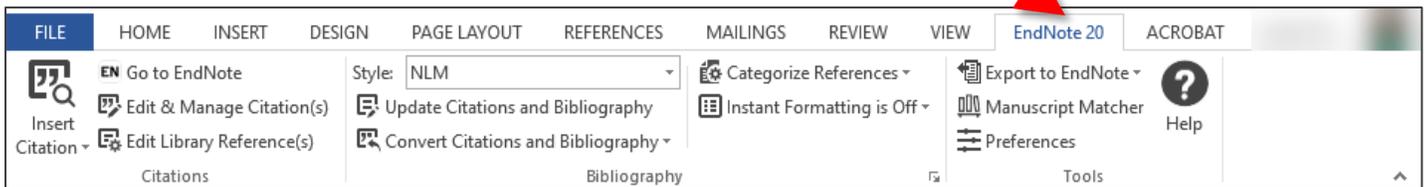
The screenshot shows the EndNote File menu. The 'Export...' option is highlighted. A red number '1' points to the 'Jellyfish' logo in the bottom left corner. A red number '2' points to the 'File' menu. A red number '3' points to the 'Export...' option in the menu. A red number '4' points to the 'Export' button in the center pane toolbar, which is represented by an arrow pointing to the upper right.

5. Navigate to the folder where you want to save the file and enter the file name.
6. From the Save as type drop down list, select **Rich Text Format**. This format will open in word processors such as Microsoft Word.
7. Select the desired citation style from the **Output Style** drop down list.
8. If you only want the references you selected to appear in the list, tick the **Export Selected References** button. Otherwise, you will export whichever group is currently selected.
9. Click the **Save** button.



Microsoft Word Plug In (Cite While You Write)

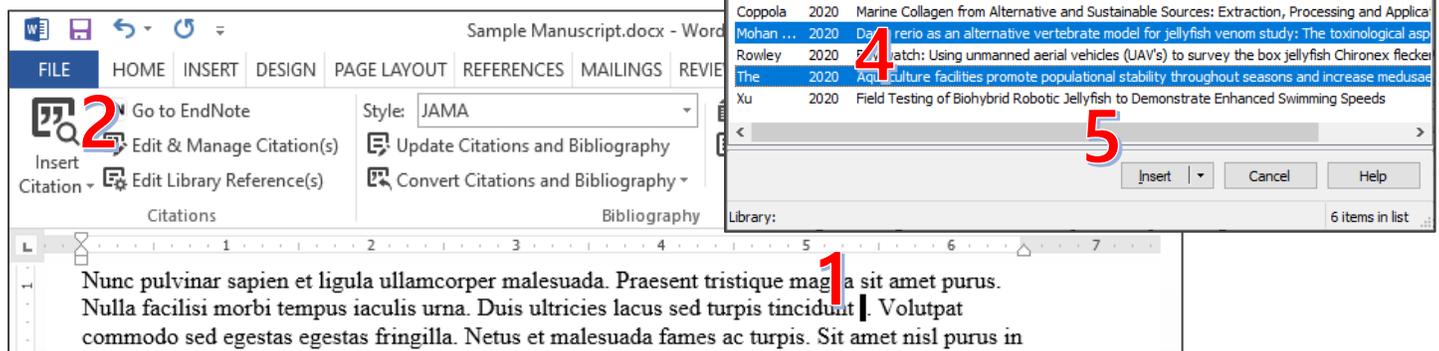
One of EndNote's most popular features is the ability to add in-text citations and automatically generate a bibliography section while working on a manuscript in Microsoft Word. After EndNote Desktop is installed on your computer, you will see a new EndNote ribbon in Microsoft Word:



Adding Citations

To add a citation to a Microsoft Word manuscript:

1. Place the cursor where you would like to insert the citation(s)
2. Click the **Insert Citation** button on the far left of the EndNote ribbon.
3. In the Find and Insert window, search for the citation.
4. Select the references(s) of interest.
5. Click the **Insert** button.



- The in-text citations will appear where the cursor had been placed, and
- a bibliography list will appear at the end of the document.

per malesuada. Praesent tristique magna sit amet purus. s commodo odio aenean
 . Duis ultricies lacus sed turpis tincidunt 1, 2. Volutpat get nunc scelerisque
 Netus et malesuada fames ac turpis. Sit amet nisl purus entesque. Viverra tellus in

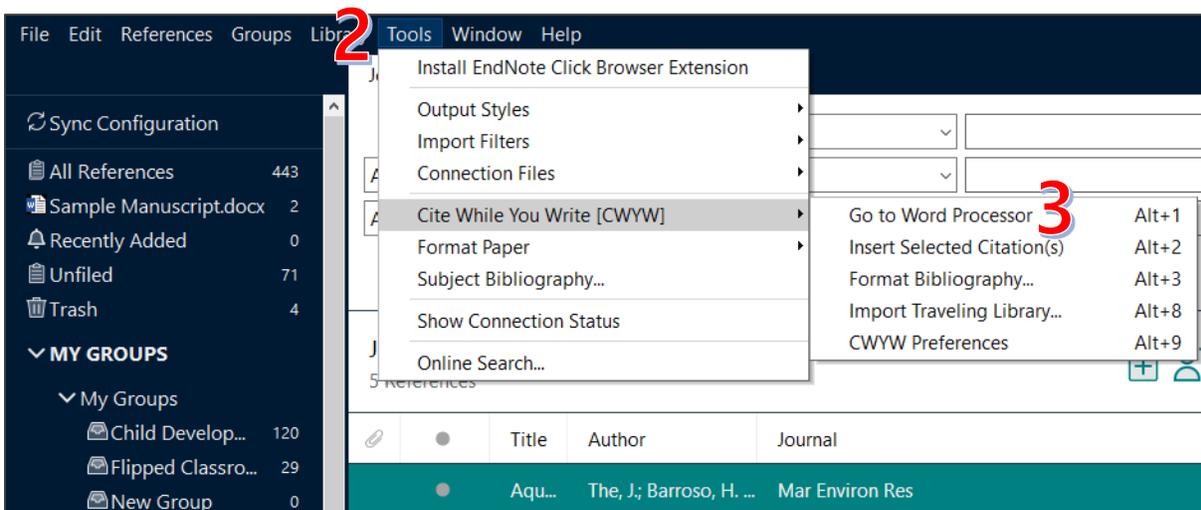
1. Mohan Prakash RL, Hwang DH, Hong IH, Chae J, Kang C, Kim E. Danio rerio as an alternative vertebrate model for jellyfish venom study: The toxinological aspects of *Nemopilema nomurai* venom. *Toxicol Lett.* 2020;335:91-7. Epub 2020/11/07. doi: 10.1016/j.toxlet.2020.10.012. PubMed PMID: 33157172.
2. The J, Barroso HS, Mammone M, Viana M, Batista Melo CS, Mies M, et al. Aquaculture facilities promote populational stability throughout seasons and increase medusae size for the invasive jellyfish *Cassiopea andromeda*. *Mar Environ Res.* 2020;162:105161. Epub 2020/10/17. doi: 10.1016/j.marenvres.2020.105161. PubMed PMID: 33065521.

It may be easier to locate references of interest from within EndNote, so it is also possible to insert citations based on whichever references are currently selected within the EndNote software:

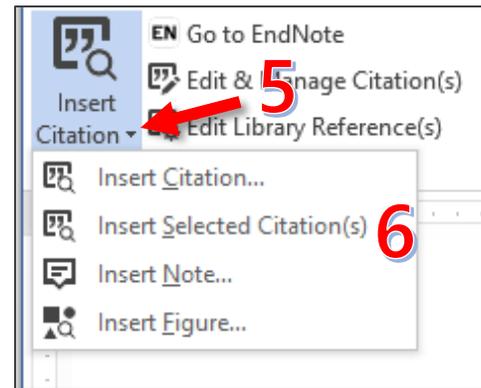
- Click **Go to EndNote** in the Citations section in the EndNote ribbon. This will bring the EndNote window to the forefront of the screen.



- Select the reference(s) of interest. You can select multiple references by holding down the CTRL (Command for Mac users) key and clicking each.
- Open the **Tools** menu.
- Hoover the cursor over **Cite While You Write (CWYW)** and then select **Go to Word Processor** to bring the Word document to the forefront of the screen.



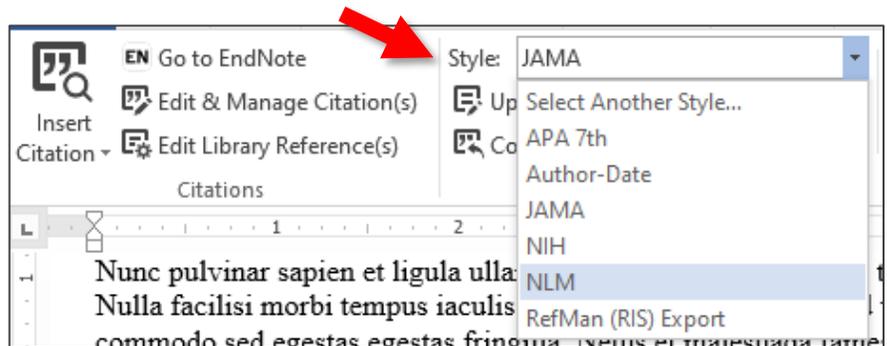
- Click the arrow in the corner of the **Insert Citation** icon to open all insertion options.
- Select **Insert Selected Citation(s)**. This will insert citations for whichever references are currently selected in EndNote.



Adding new citations will automatically reorder or renumber the bibliography and/or in-text citations according to the selected output style's requirements.

Changing Output Styles

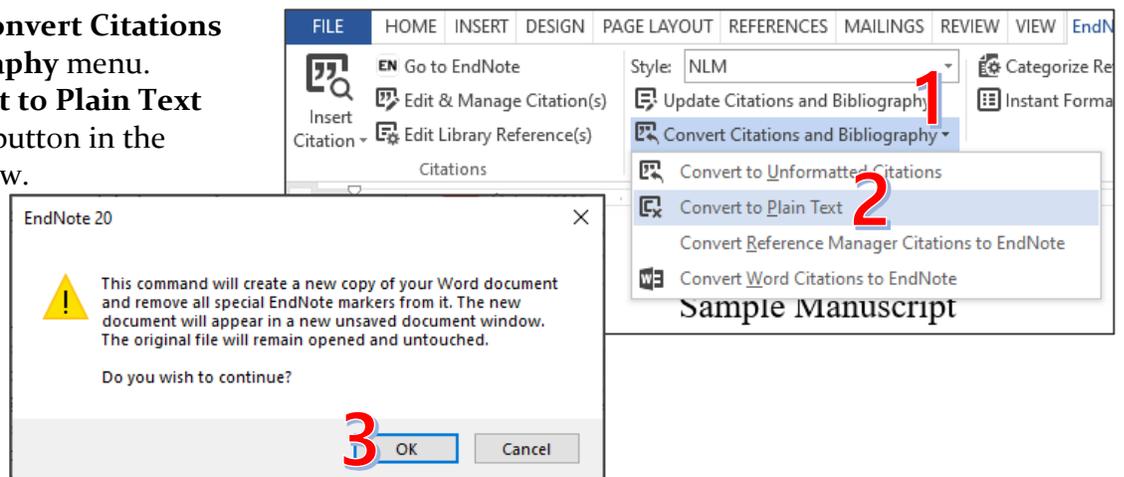
To change the style of in-text citations and bibliography, use the **Style** drop-down to select an output style (located in the **Bibliography** section of the EndNote ribbon). The drop-down only contains those output styles in EndNote's shortlist ([see page 30](#)).



Remove EndNote Formatting Before Submitting Manuscripts

Publishers often require authors to submit a manuscript with the EndNote formatting removed. To remove EndNote Formatting:

- Expand the **Convert Citations and Bibliography** menu.
- Select **Convert to Plain Text**
- Click the **OK** button in the prompt window.



Word will open a copy of your document with the EndNote field codes removed and the formatted citations and bibliography will be regular text. Your original document will remain unchanged. Remember to save the new document somewhere you will be able to find it:

1. Click the **File** button.
2. Select **Save As**.
3. Click the **Browse** button.
4. Navigate to the location you would like to save the file and give the file a name. Either the name or the location should differentiate between the EndNote and Unformatted versions.
5. Click **Save**

