# EndNote 20

SOUTHERN ILLINOIS UNIVERSITY SCHOOL OF MEDICINE LIBRARY Contact <u>reference@siumed.edu</u> 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 <u>techsupport@siumed.edu</u> 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:



Every library will have an associated "data" folder containing any attachments (<u>see page 15</u>). 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 (<u>see page 21</u>).

## Interface Overview

EndNote 20 - Training EndNote Library.e		- 🗆 X
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Child Developme 120	443 References	and development in young children: the
Flipped Classroom 29	Title     Author Journal Year	BB:2-6 routine data-linkage follow-up to earlier RCT
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more	<ul> <li>Altered actin cytoskeleton in ageing eggs of starf Limatola, N.; Vasilev, Exp Cell Res 2019</li> </ul>	Cannings-John R, et al. The Family Nurse
	Amplifving the Voice of the Patient in Clinical Res TransCelerate Biopha Ther Innov Regul 2020	improve child health and development in

#### 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

#### 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

#### 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

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.

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## Backing Up & Restoring Your Files

#### Create a Backup of Your Library

- 1. Open the **File** menu.
- 2. Select Compressed Library (.enlx).

- 4
- 5

2. Select Compressed Library (.enlx).	New	rences
3. Use the radio buttons to determine you	Open Library Ctrl+O	
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library.	Save As	
3. Save all references, selected	Save a Copy	
references, or a specific		erences
group/group set.	Share	erences
4. Click the <b>Next</b> button.	Export	
5. Save the compressed library to a folder	Import	• Title
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Create & E-mail Without File Attachments		
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	Documents	
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	Save as type: EndNote Compressed Library (*.enlx)	~
~ H	lide Folders	Save Cancel

New...

File Edit References Groups Library Tools Window Help

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.

file is located	d, then open the library.			Save a Copy		L	
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	4	Open C	ancel				

File Edit References Groups Library Tools

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Save

Save As...

Open Library...

Open Recent

Close Library

Open Shared Liprary...

Window Help

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Author

Year

Title

Ctrl+O

Ctrl+W

Ctrl+S

Ctrtl+Shift+O

# 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.

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₩WorldCat (OCLČ) more	0		٠	Bact	Peng, S.; Ha	io, W.;	Front Microbiol	2021	Jo	

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.

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## 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

Selection:



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:

Opening pubmed-	ellyfish-set.nbib	×
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🛃 pubmed-Jel	lyfish-set.nbib	
which is: NE	IB Formatted File (PubMed)	
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○ <u>S</u> ave File		
Do this <u>a</u> uto	matically for files like this from now on.	
	OK Cance	I

Choose Destination	×
Export to:	OK
EndNote Online	Cancel

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

Record Content:

Export

Author, Title, Source, Abstract

Cancel

5. Click the **Export** button.

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Veb of Science: t button at the top of the	<b>1</b> /5,	406 Add To Marked List	Export A	
<b>Desktop.</b> Ittons to determine rt only articles you have ct results, check the box , <b>All records on the</b> Fresults, or a range of results, check the box wn menu to determine	□ 1 ≧	Toxic jellyfish in Thailand <u>Premmaneesakul, H</u> and <u>Sithisa</u> 2019   INTERNATIONAL MARITIN Jellyfish stings are common in death. Jellyfish envenomation i are found on the Gulf of Thailar Morris Library Full Text Optic	EndNote online EndNote desktop Add to my Publons profile Plain text file RIS BibTeX Excel Tab delimited file	nild hea e are
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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 (<u>see page 12</u>).

#### 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:



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.

Any time	Jellyfish as food
Since 2021	YHP Hsieh, FM Leong, J Rudloe - Jellyfish Blooms: Ecological and, 2001 - Springer
Since 2020	Jellyfish have been exploited commercially by Chinese as an important food for more than a
Since 2017	thousand years. Semidried jellyfish represent a multi-million dollar seafood business in Asia.
Custom range	Traditional processing methods involve a multi-phase processing procedure using a mixture ☆ 99 Cited by 276 Related articles All 14 versions (Import into EndNote) >>>

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:

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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).

pubmed-jellyfish-set.nbib

Import

📃 Desktop

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🕹 Downloads

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Last week (10)

File name: pubmed-jellyfish-set.nbib

< <

🛃 pubmed-jellyfish-set.nbib

6. Choose the option you want for handling duplicate citations.

PubMed (NLM)

No Translation

Import All

7. Click the **Import** button.

Import File

Import File:

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9/13/2021 5:15 PM

9/13/2021 4:45 PM

9/13/2021 4:10 PM

All Files (\*.\*)

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Cancel

## 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.

New Reference (Trainin File Edit Reference	ng EndNote Library.enl) – 🗆 es Groups Library Tools Window Help	×
B <i>I</i> ⊔ X <sup>1</sup> X <sub>1</sub>	۹ کار Save	
Reference Type	Book Section	·
Author		
Year		
Title		
Editor		
Book Title		
Place Published		
Publisher		•

## 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.

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Jellyf 5 Refe	ish rences					Ê	&⁺∑	۵ ()	- Author	The, J. Barroso, H. S. Mammone, M Viana, M. Batista Melo.	l. C. S.	
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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:

Select a file to link to the reference

Look in: Desktop

Microsoft Word Document

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## **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 no

To attach

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- 2. Ir
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0	•	Title	Author	Journal	,	Year		PLoS One 2020 Vol. 15 Issue 10 Pages e0241410
	•	Aqu	The, J.; Barroso, H.	Mar Environ Res	:	2020		Accession Number: 33119724 PMCID:
	•	Bay	Rowley, O. C.; Cou.	PLoS One		2020		10.1371/journal.pone.0241410

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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**.

File Edit R	eferences Groups Lib	rary Tools	Window	Help				
	New Reference		Ctrl+N					
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Sound	URL 2	0	• N	ew Van Wassenb	oergh,	PLoS One		2014

## **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. 2.	Open the <b>Edit</b> men Select <b>Preferences</b>	u (EndNote menu for Macs).	File	dit References Groups Undo	Library Tools W Ctrl+Z	/indow Help es
3.	Select Find Full Te	xt.	Cic	Cut	Ctrl+X	
4.	In the <b>OpenURL</b> Pa	ath box enter https://i-share-	25	Сору	Ctrl+C	hor
	SIM.primo.exlibrisg	roup.com/openurl/oiCARLI_SI	A 🗎	Paste	Ctrl+V	r
	M/oiCARLI_SIM:CA	ARLI_SIM?	₽ R	Paste With Text Styles	Ctrl+Shift+V	e
5۰	Leave the Authenti	cate with URL blank.	E E L	Select All	Ctrl+A	
6.	Click the <b>OK</b> button	1.	WI	Font	•	,
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	Change Case Display Fields Display Font Duplicates Find Full Text Folder Locations Formatting Libraries PDF Handling Reference Types Sorting Spell Check Sync Temporary Citations Term Lists URLs & Links	The Find Full Text feature uses several technologies to maximize the chances that EndNote will find all available PDFs. Use this screen to control these full text search options:  Web of Science Full Text Links DOI (Digital Object Identifier)  PubMed LinkOut (U.S. National Library of Medicine)  OpenURL OpenURL OpenURL Authenticate with: URL: Examples: https://i-share-SIM.primo.exlibrisgroup.com/openu Authenticate with: URL: Authenticate with: Authenticate	H/01K 4	Preferences		res
	EndNote Defaults R	Automatically invoke Find Full Text on newly-imported references evert Panel           OK         Cancel	Apply			

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**.

File	Edit	References	Groups	Library	Tools	Window	w Hel	р		
	4	New Ref	erence			Ctrl+N				
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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 <u>Finding Full Text research guide</u> (<u>https://libguides.siumed.edu</u>).

	REFERENCE HELP	KEY RESOURCES	AND DATABASES A-Z	SIU MEDICINE LIBRARY SEARCH	JOURNAL SEARCH	ALL I-SHARE LIBRARIES SEARCH			
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#### 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.



File Edit References	Groups Library Tools Window Help	
	Create Group	
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All References	Rename Group	/ Title 🗸 Cont
♣ Recently Added	Edit Group Delete Group	~ Cont
🗓 Trash	Share Group	
∽ MY GROUPS	Add References To	•
✓ My Groups	Remove References From Group	
🖻 Child Develo	Create Group Set	
🖻 Flipped Class	Delete Group Set	, , , , , , , , , , , , , , , , , , ,
🖻 New Group	Rename Group Set	
✓ Sea Animals	Create Citation Report Manuscript Matcher	ed Development

To add references to a group;

- 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.

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	Create Group	
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♠ Recently Added	Edit Group Delete Group	<ul> <li>Contains</li> </ul>
聞 Trash	Share Group	Simple search
∽ MY GROUPS	Add References To 3	Create Custom Group
✓ My Groups	Remove References From Group	My Groups
Child Develo	Create Group Set	Child Development
🖾 Flipped Class	Delete Group Set	Flipped Classroom
✓ Sea Animals	Rename Group Set	Sea Animals
🖾 About Seaho	Create Citation Report	Jellyfish
🖾 Jellyfish	Manuscript Matcher	Seahorse
■ Seahorse	17 • Actin asse	Starfish mbly ruptures the Wesolowska,

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.

File Edit Referen	Groups Library Tools Window Help Create Group	
${\mathcal S}$ Sync Configuration	Create Smart Group Create From Groups	~ Cont
All References	Rename Group Edit Group Delete Group	/ Title v Con v Con
W Trash ✓ MY GROUPS ✓ My Groups	Share Group Add References To Remove References From Group	
Child Develo Elipped Class	Create Group Set Delete Group Set Rename Group Set	
✓ Sea Animals	Create Citation Report Manuscript Matcher	ed Development

#### 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: File Edit References Groups Library Tools Window Help 1. Open the **Groups** menu. Create Group Create Smart Group. 2. Select Create Smart Group.  $\mathcal{C}$  Sync Configuration Cont Create From Groups. 3. In the Smart Group window type in the All References Rename Group Title Cont  $\sim$ name for your smart group. A Recently Added Edit Group... 4. Use the dropdown menus and text Cont  $\sim$ 🗎 Unfiled Delete Group boxes to set the criteria for the smart 🗓 Trash Share Group.. group. In the pictured example, we will **∽ MY GROUPS** Add References To create a group for articles with the Remove References From Group ✓ My Groups word "seahorse" in the title that were Child Develo Create Group Set published in the journal "J Fish Biol." Delete Group Set Flipped Class 5. Click the Create button. Rename Group Set New Group Smart Group Create Citation Report ✓ Sea Animals Manuscript Matcher ed Development About Seaho Smart Group Name: Seahorses in Journal of Fish Biology Title Contains  $\sim$ seahorse + | × J Fish Biol + × Journal/Secondary Title Contains  $\sim$ And Options -Create Cancel

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

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

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

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0	•	Title		~	Author		Restore Default		· · ·
						_	Convert to Smart Grou	р 🕗	— I

#### **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 <b>Edit</b>	t menu (EndNote menu for	File Edit Referen	nces Groups	Library Tools Windo	w Help
-	Macs).	<b>2</b>	Undo		Ctrl+Z es	
2.	Select Prefere	inces.	្លុន <sup>Cut</sup>		Ctrl+X	
3.	Click the Engl	hla Suna button	Сору		Ctrl+C nor	
4·	In the EndNet	ble Sync Dutton.	🗎 A Paste		Ctrl+V r	
5.	Sign Un butto	e Login window, click the	A R Paste With	h Text Styles	Ctrl+Shift+V	
	Sign Op butto	/11.	📋 L Select All		Ctrl+A	
	EndNote Preferences	1	T Font		•	
	Change Case Display Fields	Synchronize your data with your EndNote account. Learn more	∽∧ <sup>Size</sup>		•	
	Display Font Duplicates	Upgrade or create your two-year EndNote account to get the latest feature and enable Sync.	s Style		•nce	s
	Find Full Text Folder Locations	Enable Sync	Preference	es Z	ces	
	- Formatting	4		erer <mark>apat</mark> hem -		
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		Sync Automatically		and of archestarcy and	Sign op	
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E	-mail Address:	Using an EndNote account makes it easy	v to keep your EndNote librar	ry in sync.	account.	
Q	* First Name:	Please enter your e-mail address.		7.	Click the Submit	button.
0	* Last Name:   * Password:	E-mail Address:  reference@siumed.edu	6	8.	Follow the prom	pts in
* Rety	/pe Password:				the EndNote Reg	istration
		Submit	Cancel		window to create	e an
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		10	Done Cancel	10.	Click the <b>Done</b> b	outton to
				]	exit the registrati	ion
					window.	

- In the EndNote Login window, enter the log in information for your EndNote account.
- 12. 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.

If you don't ha	Note Account ave an EndNote account or aren't sure, then click Sign Up.	Sign Up	
EndNote Account	Credentials		
E-mail Address:	11		
Password:			

#### Setting up Sync Preferences

To connect EndNote Desktop with an EndNote account:

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

EndNote Preferences		×
Change Case Display Fields Display Font Duplicates Find Full Text Folder Locations Formatting Libraries PDF Handling Read / Unread	Synchronize your data with your EndNote account. Learn more Upgrade or create your two-year EndNote account to get the latest features and enable Sync Enable Sync EndNote Account Credentials E-mail Address:	
- Reference Types - Sorting - Spell - Sync - Temp - Temp Lists - URLs & Links - URLs & Links	Password: 4	
EndNote Defaults Re	evert Panel OK Cancel Apply	1

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

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$\sim$ N	Size	•
	Style	hces
	Preferences	ces

#### 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:

		Sync Status				
Ø Sync Status	^	Sync Status 2	${\mathcal S}$ Sync now Refresh status	¢ -		
🖹 All References	9845		File Edit References Group	Library T	ools Window	Help
A Recently Added	0	Sync Details		Sync		
🗎 Unfiled	0	Last sync: Wednesday, February (		Advan	ced Search	-
🔟 Trash	32	Error code:	Svnc Status	Sort Li	brary	-
		Error message:	S Sync Status	Find D	uplicates	
V WIT GROUPS		Local Library	All References	Find B	roken Attachmer	nt Links
			A Recently Added	Open 1	Term Lists	•
1. Click the <b>Sync</b>	e <b>Status</b> but	ton in the left pane. If	🖺 Unfiled	Define	Term Lists	Ctrl+4
you are workin	ng with a lit	prary different from	🗑 Trash	Link Te	erm Lists	Ctrl+3
that which is s	wnced to vo	yur EndNote Online	∽ MY GROUPS	Spell C	Check	Ctrl+Y
	·11 · · · · · · · ·		> Literature Searches	Find ar	nd Replace	Ctrl+R
account, this v	will instead	say <b>Sync</b>		Chang	e/Move/Copy Fi	elds
Configuration	n.		✓ Unknown Set	Recove	er Library	
2. Click the <b>Sync</b>	Now butto	on. OR	✓ My Groups	Library	Summary	
3. Open the Libi	r <b>arv</b> menu a	and select <b>Svnc</b> .	Authorship	0	,	Madi

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> <li>All collaborators must have an EndNote Online account. (Clarivate offers a free version of EndNote Online with limited storage space).</li> <li>Shares references, but not attachments.</li> <li>Shared folders are visible in the EndNote Desktop left pane, but open in EndNote Online</li> </ul>	<ul> <li>All collaborators must have EndNote Desktop.</li> <li>Users can only share the library associated with their EndNote Online account.</li> <li>Shares references and attached files.</li> </ul>	<ul> <li>Can be imported to most other reference managers.</li> <li>Will not sync; any updates must be entered manually or through additional exports.</li> <li>Shares references but not attachments.</li> </ul>
Best For:	Best for:	Best for:
Collaborating with people who do not have EndNote Desktop but are open to creating and using an EndNote Online account.	Collaborating with other EndNote Desktop users.	Sharing static groups of references with collaborators who do not wish to use the EndNote ecosystem.

#### 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.

low, enter the email	Recently Added	Edit Group
rators. If they have	🛱 Unfiled	Delete Group
e to use the emails	🖑 Trash	Share Group
ounts.	∽ MY GROUPS	Add References To
write privileges for	✓ My Groups	Remove References from Group Ctrl+E
	About Seaho	Create Group Set
ersonalized message	🖻 Child Develo	Delete Group Set
	Elipped Class	Rename Group Set
Sharing Group Authorship	New Group	Create Citation Report Manuscript Matcher
Find People	Seanorses in	
Sharing with	Sea Animals	<ul> <li>Danio rerio as an</li> </ul>
Invite More People Enter email addresses separated by commas reference @siumed.edu 4 Permission: Read & Write Add a messa Read & Write Read & Write Add a messa Read Only		
	Close	
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File Edit Refer

 $\Im$  Sync Configuration

All References

Groups Library Tools Window Help

Create Group

Rename Group

Create Smart Group...

Create From Groups...

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.

Sharing Group Authorship		×	
Find People			
Sharing with	Permission		_
reference@siumed.edu	Read & Write	¢.	
		3 Rem Rem	ove S
		Read	l Only
		✓ Read	& Write

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:

References

Search

My References

[Unfiled] (34)

Quick List (0)

Lymohoedema (70)

Seahorses (148) 🧞

Social Determinants (92)

Groups Shared by Others

Balcazar, J. L.

V My Groups

Trash (0)

**∨MY GROUPS** 

✓ My Groups

✓ FIND FULL TEXT

✓ GROUPS SHARED BY ...

Reference@siumed.e...

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Social Determ... 92



Online Link+ Go to URL

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Curr Microbiol

2014

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#### 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.



File Edit References Groups Library Tools

Ctrl+O

Ctrl+W

Ctrl+S

Ctrtl+Shift+O

New.

Save

Save As...

Open Library...

Open Recent

Close Library

Open Shared Library...

If a library is shared with you, you will receive would like an email notification from to share an EndNote library with you. noreply@endnote.com with instructions on Accept the invitation how to access the shared resource. To open a library that has been shared with you: To accept this invitation and access Lydia Howes's library, you must have Open the File menu EndNote X7.2 or later installed, and we strongly recommend using EndNote 20 1. for the best experience. 2. Select **Open Shared Library** Once you've accepted this invitation, you will be able to access all of the 3. Select the appropriate library from the references, PDFs, file attachments, and notes in this shared library from your list of libraries shared with you. EndNote desktop application. 4. Select Open. Don't have EndNote for your desktop yet? Get the latest version now to File Edit References Groups Library Tools access shared libraries and much more. New... Learn more about sharing your research using EndNote. Open Library... Ctrl+O Open Shared Library. Ctrtl+Shift+O Open Recent **Close Library** Ctrl+W Select a Shared Library Save Ctrl+S Owne Save As... Save a Copy... Share... Export... Import Print... Ctrl+P **Print Preview** Print Setup... Compress Library (.enlx) ... Open Cancel Exit Ctrl+Q

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 (<u>see page 30</u>).
- 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)

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🖻 Jellyfish 🔰 🗄	5	• H	ieia	Xu, N. W.; ION	/nse	BIOMIMETICS (Basel)		2020	

- 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.**
- If you only want the references you selected to appear in the list, tick the Export Select 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.



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Fishery Bulletin	Author-Year	Ecology	2011-05-13	Download			

- 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.

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## 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. <u>See page 30</u> 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.



## 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).

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- 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 Select References** button. Otherwise, you will export whichever group is currently selected.
- 9. Click the **Save** button.

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## 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:

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#### **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.

	Amree	2021	Jellyfish venom proteins and their pharmacological potentials: A review							
		Coppola	2020	Marine Collagen from Alternative and Sustainable Sources: Extraction, Processi	ig and Applicat					
🕎 🚽 🀬 T 🕐 🗧 Sample Manuscript.docx -	Word	Mohan	2020	Day rerio as an alternative vertebrate model for jellyfish venom study: The toxing						
	B D 4 D	Rowley	2020	Jatch: Using unmanned aerial vehicles (UAV's) to survey the box jellyfish C	hironex flecker					
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EndNote 20 Find & Insert My References

Title

Find

Search: Libraries

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

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 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:

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

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	Citations			Bibliography 🕞 🔺	с.

- 2. Select the reference(s) of interest. You can select multiple references by holding down the CTRL (Command for Mac users) key and clicking each.
- 3. Open the **Tools** menu.
- 4. 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.

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

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Adding new citations will automatically reorder or renumber the bibliography and/or in-text citations according 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:

- 1. Expand the **Convert Citations** and **Bibliography** menu.
- 2. Select Convert to Plain Text
- 3. 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

