Getting started with EndNote X9

Opening EndNote X9 and creating an EndNote library

1. **Open** EndNote. *(If an EndNote Web window opens, click Cancel.)*
2. Once EndNote is open, click on **Create a New Library**, or **File** and then **New**.
3. Name the file e.g. practice.enl and **save** it.

Exporting Results from PubMed (go to www.pubmed.gov)

To export your results from PubMed to your Endnote library:
1. Conduct a search in PubMed
2. Select the results you wish to export by putting a tick in their boxes.
3. Just above the first result you will see **Send to:** Click on the arrow to the right of this menu.
4. From the options that appear select **Citation manager** and click **Create File**. You can export up to 200 results at a time.
5. Depending on which browser you are using and how it is set up, the file may download in the bottom left of the screen. Click the file to open and your PubMed references will then be directly imported into your Endnote library.
6. If you don't see the file in the bottom left of the screen you can find it in your computer's download folder. Click the file to open and your references will be directly imported into your EndNote library.

Exporting Results from Medline (example of direct export)

1. On the SOLO homepage under **Useful Links** go to **Databases A-Z**.
2. Type **Medline** and click **Search**.
3. Click on the link **Medline (Ovid)**, this will open a new window.
4. Scroll down the list and choose **Ovid MEDLINE(R) In-Process & Other Non-Indexed Citations and Ovid MEDLINE(R) 1946 to present**
5. Ensure you are in **Advanced Search** and perform your search.
6. Display the results, then select the results (if practicing, choose the first 20) clicking in the box to the left of each reference. You can export up to 1000 references at a time.
7. When you have selected your results, click on **Export**

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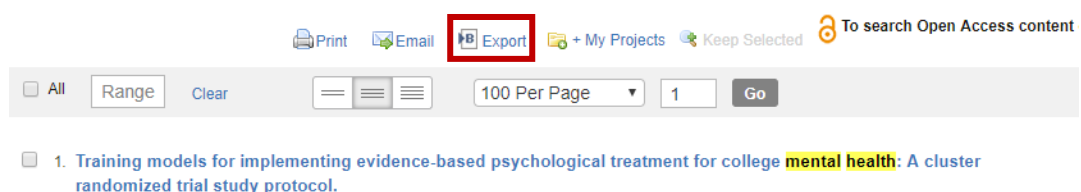
8. Change the dropdown to **Endnote** and choose **Complete Reference**. Then click **Export Citation(s)**.
9. Depending on the browser you are using and how it is set up, the file may automatically download into EndNote or it may download into the bottom left of your screen, in which case you just need to click it to open. Alternatively, a small browser window may open, in which case choose destination **Endnote**. If prompted to choose an import filter, you must choose the filter that corresponds to the database (and provider) you have been using. In this case, choose **MEDLINE (OVID)** and click on **Choose**.
10. The results will now appear in the Endnote library.

N.B. Note that your records are automatically imported into the Library which you have opened, or the EndNote Library that you have had open most recently. If the EndNote Library into which you wish to import records is not open, you will be prompted to choose an EndNote Library.

Google Scholar

First, check the setup of Google Scholar:

1. Go to Google Scholar - https://scholar.google.co.uk - and click on the **three horizontal lines** at the top left hand corner:

    ☰ Google Scholar

2. Click on **Settings**.
3. Under Search results, look at the **Bibliography manager** option and click on **Show links to import citations into…** and select **EndNote**.
4. Click on Save.

Conduct your search in Google Scholar – for books or journal articles

1. Each record displayed will have an **Import into EndNote** link. Clicking on the link will download a file, which will open up in EndNote when you click to open it.
2. *Depending on your browser you may be asked to choose which EndNote Library you wish to import the citation into. You may need to navigate to where your EndNote libraries are located. Choose a library.*
3. The citation should be imported into the EndNote library.

N.B. If you have Zotero installed your citations will be sent to Zotero - turn off the Zotero Preference that downloads RIS/Refer files.

Adding new references

To add a reference such as a webpage

1. Click on **References > New Reference** and select the **Reference Type** (eg. webpage)
2. Complete as many fields in this window as possible, including Author, Year, Title, and URL.
3. Click on **File > Save**, and click on the smaller x at the top right hand corner of the screen, to close the record.

Managing and editing your library

Checking for duplicates

1. To identify duplicate items, click on **References** from the toolbar, then **Find Duplicates**. The **Find Duplicates** box opens.
2. At the top of the box there is a message telling you how many duplicates have been found. The box then displays the duplicate items side by side, inviting you to select which one to keep. For the item you keep, click on **Keep This Record**.

EndNote identifies duplicate references in a library as references of the same reference type with matching Author, Year and Title fields. It is possible therefore that one of the duplicates may contain more detail than another, and you therefore may have a preference as to which reference you keep.

Download PDFs

To download the PDF for an article into your Endnote library:

1. Highlight the reference.
2. Click on **References**, and choose **Find Full Text**.
3. You may have to authenticate yourself as an Oxford University user by entering your Single Sign-On details into the next screen.
4. Wait for the **Find Full Text** section in your Endnote Library (to the left hand side of the screen, under Endnote Web) to finish looking for the PDF.
5. If it is successful, you will see a **paperclip icon** next to the reference in your Endnote Library. You can view the PDF by clicking on the PDF icon on the right hand reference pane & opening it full screen by clicking on the box icon with an arrow underneath 'Reference'.

N.B. In the event that the **Find Full Text** tool doesn't find a PDF for a reference it is still worth looking for the PDF by searching for the article/journal on SOLO. You can attach PDFs to a reference yourself by right clicking on the reference **> File Attachments > Attach File**.

Creating a Bibliography

If you want to create a separate bibliography (i.e. just a list of references):

1. Select the references you wish to include in by highlighting them in your EndNote library.
2. Go to **File** and choose **Export**.
3. Change the file type to **Rich Text**, and choose the output style (e.g. Harvard).
4. Click **Save**.

Cite As You Write: Inserting a citation and creating a bibliography with EndNote

You can use Word with EndNote to insert references and create a bibliography in a document.

It is important to install EndNote after you install Microsoft Word. When you install EndNote, an EndNote menu is added to the top toolbar (or in versions older than Word 2007, an Endnote submenu is added to the Tools menu). This menu doesn't appear if you install Word after EndNote.

1. In Word open a new document and enter some text.
2. Click on the **EndNote X9 tab** at the top of the screen to see the EndNote options in Word.
3. Choose your reference style e.g. Harvard from the **Style** list.
4. Click on **Go to EndNote** to switch to the EndNote library you have open. Highlight a reference of your choice.
5. Return to your Word document and place your cursor exactly where you would like to insert the citation in the body of the text.
6. Click on **Insert Citation**. Some additional options will appear. Click on **Insert Selected Citation(s)** to insert the reference.
7. Word and EndNote will automatically format the reference, and insert a bibliography at the end of your document.
   e.g. BELCHER, E. H. & HARRISS, E. B. 1956. Radioactive tracer investigations of red cell survival in the rat. Strahlentherapie, Sonderbd 36, 5-12.

N.B. If your chosen style requires you to add page numbers to your in-text citations click on the citation you have inserted in Word and click **Edit & Manage Citation(s)** in the tool bar at the top. In the **Suffix** box (not "Pages", strangely!) put a space then e.g. p.9.

Saving a copy of your library

1. From the file menu choose **Save a Copy**.

N.B. This will only save a copy of your references not any PDFs you've added. To save both your references and PDFs make sure you save a copy of the **.ENL file** AND a copy of the **.DATA folder**.

Saving a Compressed EndNote Library

If you want to back up your library or send it to someone else the best way is to save it as a **compressed file (.enlx)**

1. Open the library in EndNote, go to **File** & choose **Compressed Library** at the bottom of the list.
2. Select **Create** and **With File Attachments** (select **Create & E-mail** if you want to send your Compressed Library as an e-mail attachment.
3. Select **Next** then save the file. You will be able to open the file by double clicking on it as long as EndNote is installed on your machine.

Useful links

Official EndNote Tutorials: http://clarivate.libguides.com/endnote_training/home
Get help from your Bodleian Health Care Libraries Outreach Librarian: hcl-enquiries@bodleian.ox.ac.uk