This session will be recorded. The recording will be made available on the library website, along with the class PowerPoint slides.

EndNote 21

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University of Nebraska Medical Center

Objectives

Understand the functionality of EndNote

Insert citations into EndNote from the library's literature databases, websites, and adding manually.

Modify EndNote to meet your research and collaboration needs

Why Use a Citation Manager?

Zotero and EndNote allow you to :

- Manage all your citation records in one place
- Access and store full-text PDFs
- Generate bibliographies in preferred formats (ex: APA, Vancouver)
- Install writing tools for Word to create in-text citations
- Share collections with colleagues
- Assist with the removal of duplicates

EndNote or Zotero?

EndNote (Desktop App)	Zotero
Requires installation on a PC or Mac; EndNote Online available	Desktop installation on PC or Mac; Cloud based available
Direct export (using Firefox) from databases and Google Scholar	Direct export from databases and Google Scholar
Fair to moderate learning curve	Fairly easy to learn
Can customize to meet research needs; groups; customize citations	Can customize to meet research needs; folders; customize citations
Create bibliography and in-text citations in Microsoft Word and Apple Pages; Microsoft 365 (online) option available (EndNote 21 only)	Create bibliography and in-text citations in Microsoft Word and Google Docs. Microsoft online: unformatted citations only

Getting Started

How to Access EndNote

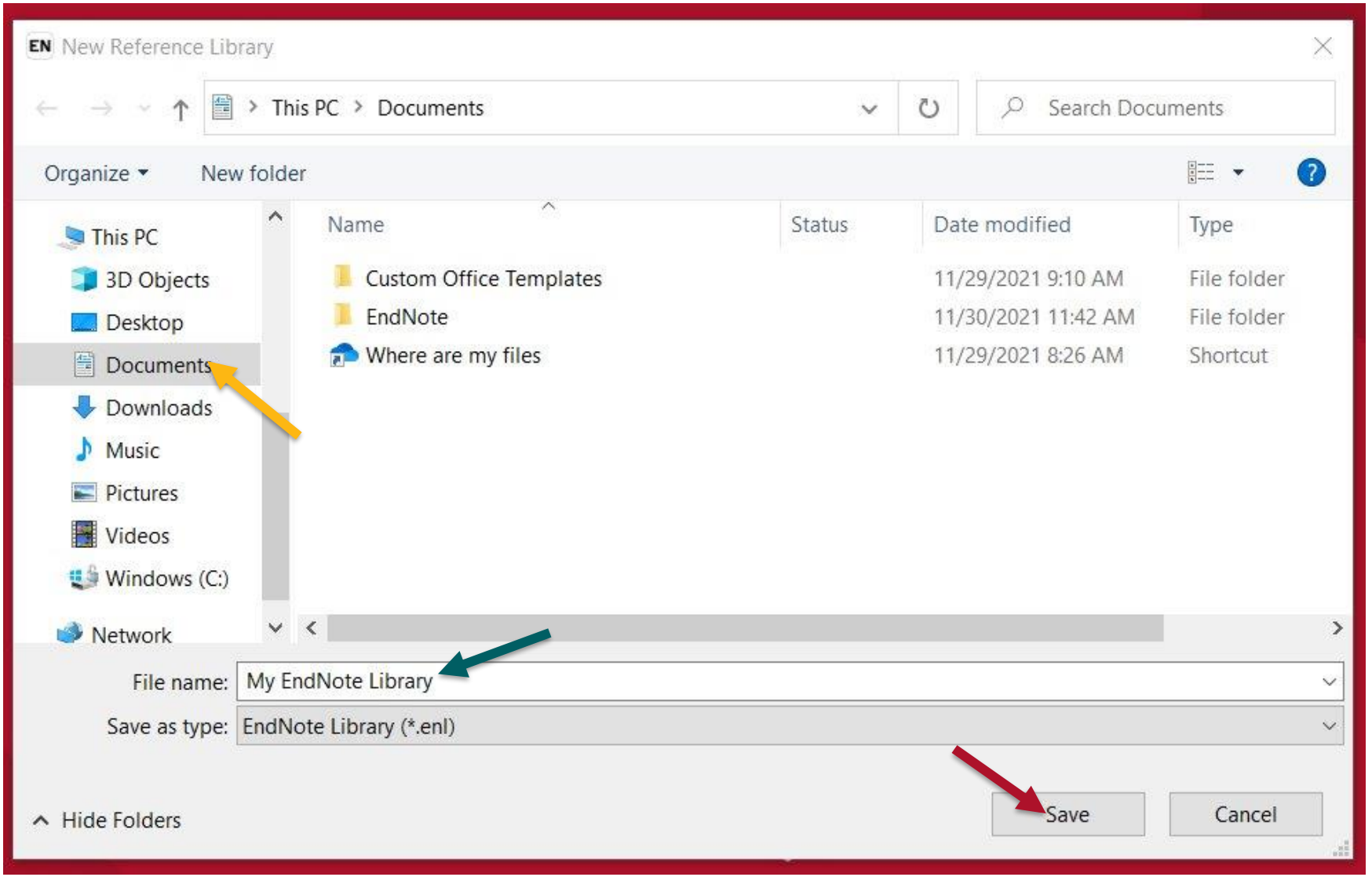
EndNote 21 is available from the UNMC Research Information Technology Office (RITO)

https://www.unmc.edu/vcr/rito/software/endnote/index.html

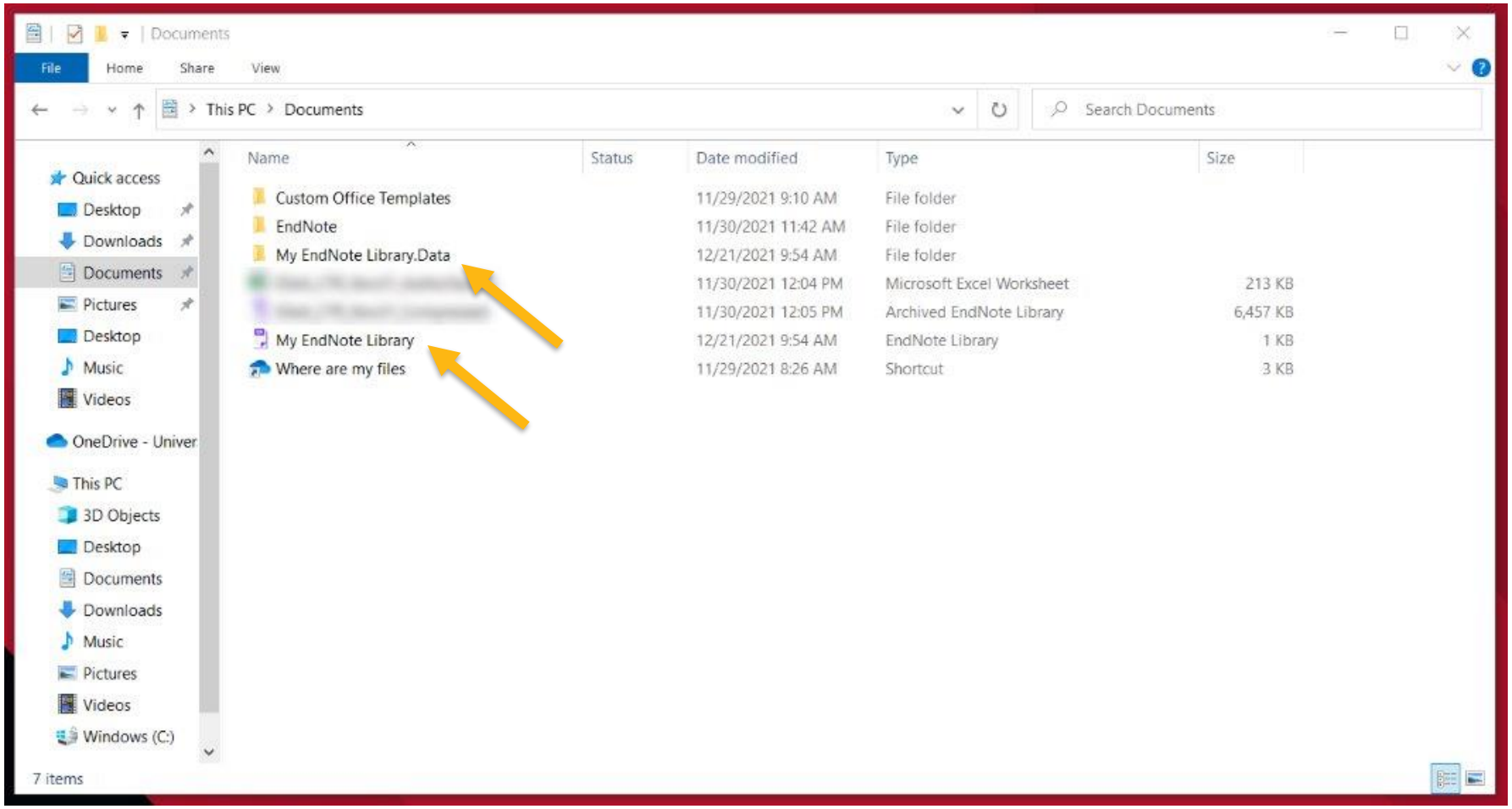
There are separate instructions for UNMC owned workstations (Mac and Windows), personal Windows computers, and personal Mac computers.

Contact rito@unmc.edu for assistance with downloading the software

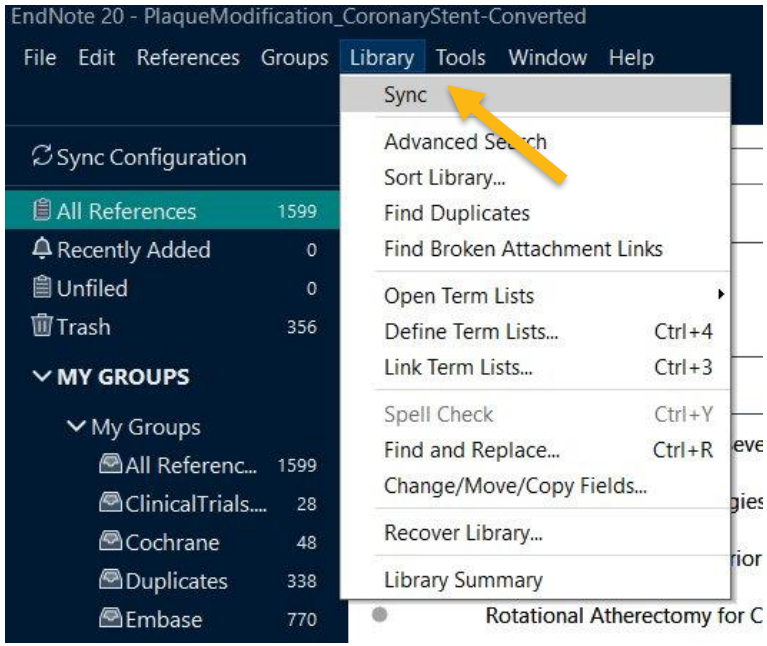
Saving Your EndNote Library

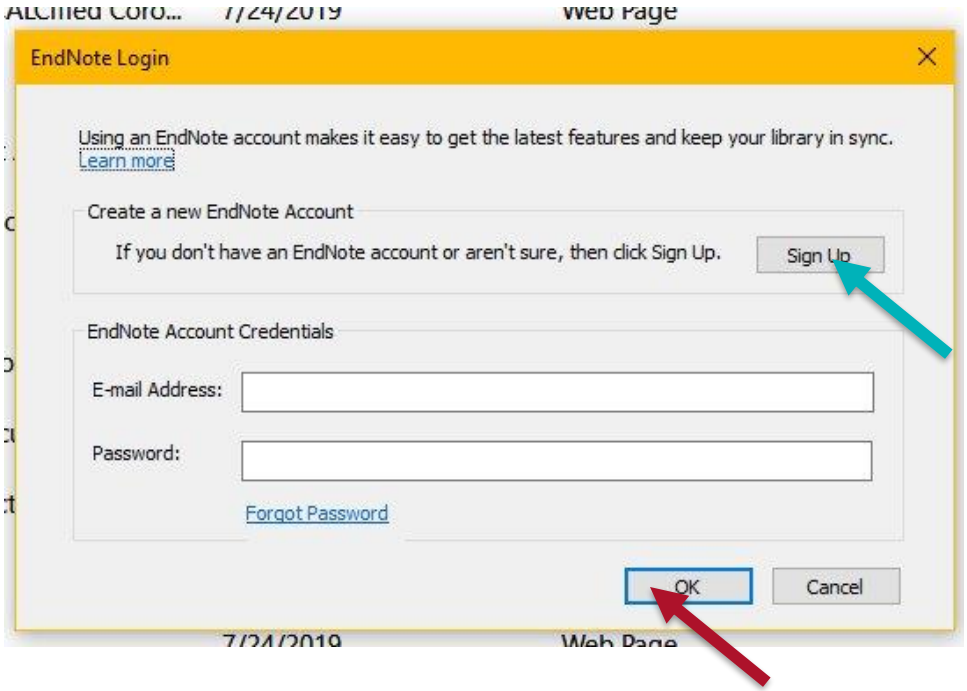


Saving Your EndNote Library



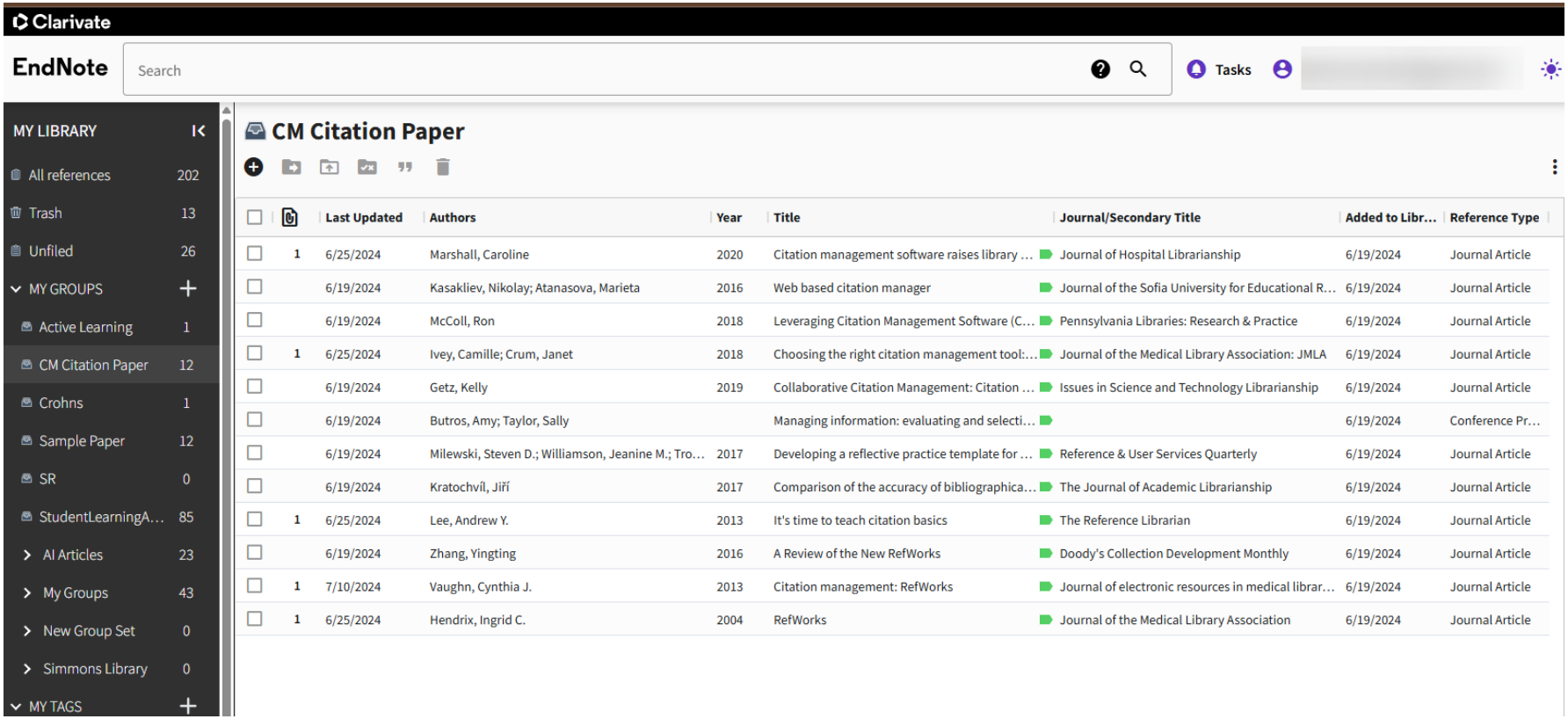
Syncing EndNote with EndNote Online





In EndNote, click **Library** > Sync. Create your EndNote online account or enter in your account credentials. This is not tied to your UNMC NetID and password

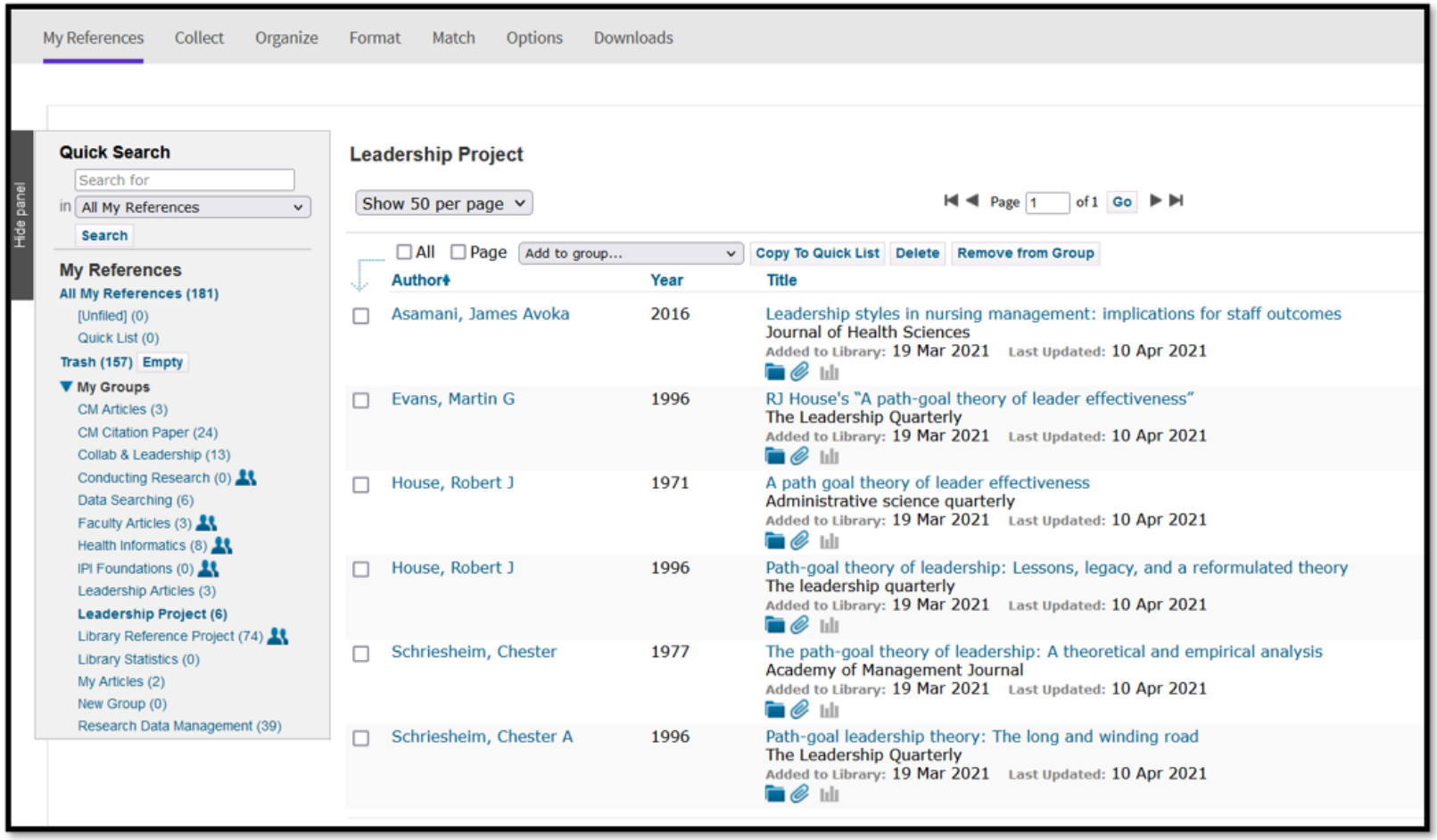
EndNote Online (EndNote 21 Users)



		Last Updated	Authors	Year	Title	Journal/Secondary Title	Added to Libr…	Reference Type
☐	1	6/25/2024	Marshall, Caroline	2020	Citation management software raises library …	Journal of Hospital Librarianship	6/19/2024	Journal Article
☐		6/19/2024	Kasakliev, Nikolay; Atanasova, Marieta	2016	Web based citation manager	Journal of the Sofia University for Educational R…	6/19/2024	Journal Article
☐		6/19/2024	McColl, Ron	2018	Leveraging Citation Management Software (C…	Pennsylvania Libraries: Research & Practice	6/19/2024	Journal Article
☐	1	6/25/2024	Ivey, Camille; Crum, Janet	2018	Choosing the right citation management tool:…	Journal of the Medical Library Association: JMLA	6/19/2024	Journal Article
☐		6/19/2024	Getz, Kelly	2019	Collaborative Citation Management: Citation …	Issues in Science and Technology Librarianship	6/19/2024	Journal Article
☐		6/19/2024	Butros, Amy; Taylor, Sally		Managing information: evaluating and selecti…		6/19/2024	Conference Pr…
☐		6/19/2024	Milewski, Steven D.; Williamson, Jeanine M.; Tro…	2017	Developing a reflective practice template for …	Reference & User Services Quarterly	6/19/2024	Journal Article
☐		6/19/2024	Kratochvíl, Jiří	2017	Comparison of the accuracy of bibliographica…	The Journal of Academic Librarianship	6/19/2024	Journal Article
☐	1	6/25/2024	Lee, Andrew Y.	2013	It's time to teach citation basics	The Reference Librarian	6/19/2024	Journal Article
☐		6/19/2024	Zhang, Yingting	2016	A Review of the New RefWorks	Doody's Collection Development Monthly	6/19/2024	Journal Article
☐	1	7/10/2024	Vaughn, Cynthia J.	2013	Citation management: RefWorks	Journal of electronic resources in medical librar…	6/19/2024	Journal Article
☐	1	6/25/2024	Hendrix, Ingrid C.	2004	RefWorks	Journal of the Medical Library Association	6/19/2024	Journal Article

https://web.endnote.com/

EndNote Online (classic)



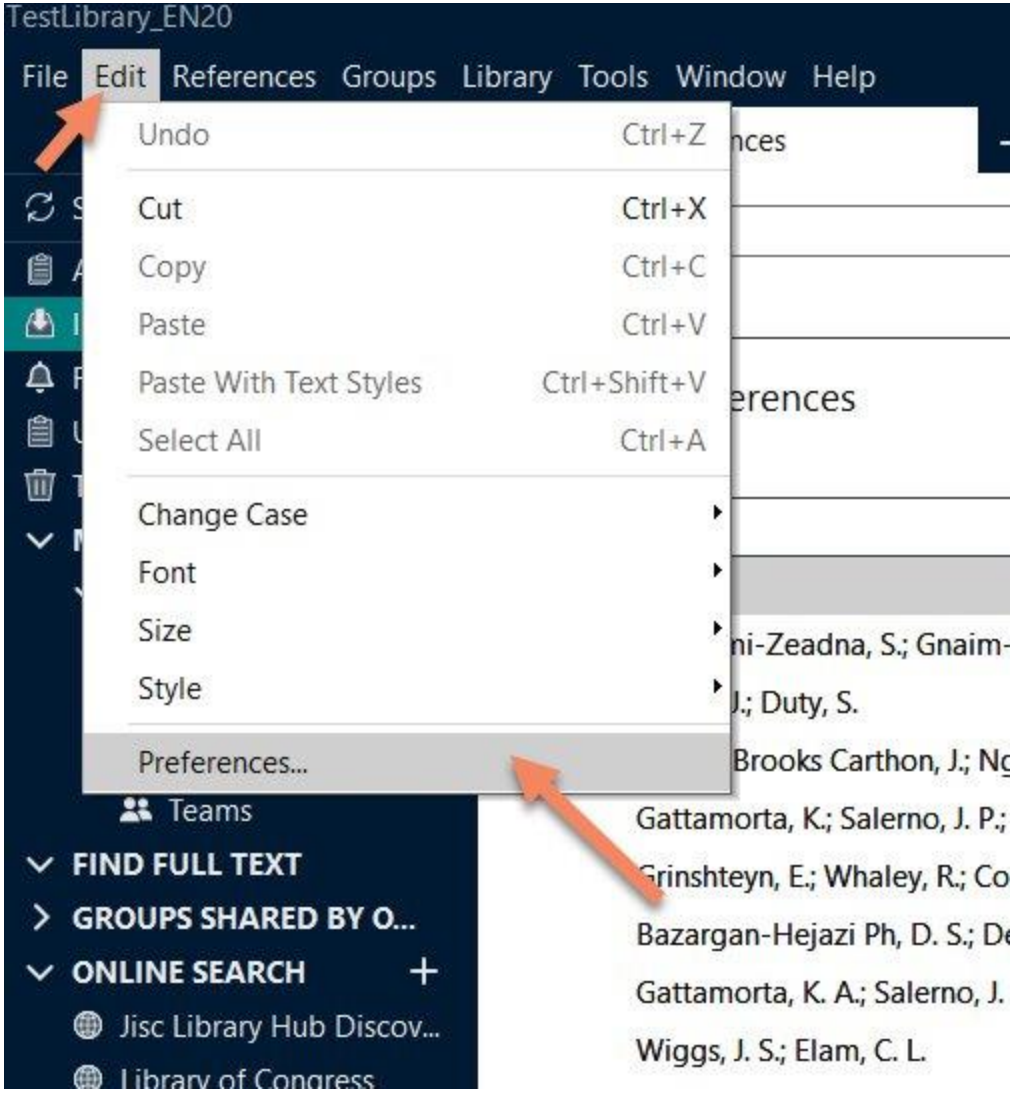
https://access.clarivate.com/login?app=endnote

Customizing: Full Text

In EndNote, go to **Edit** > Preferences

Mac users:

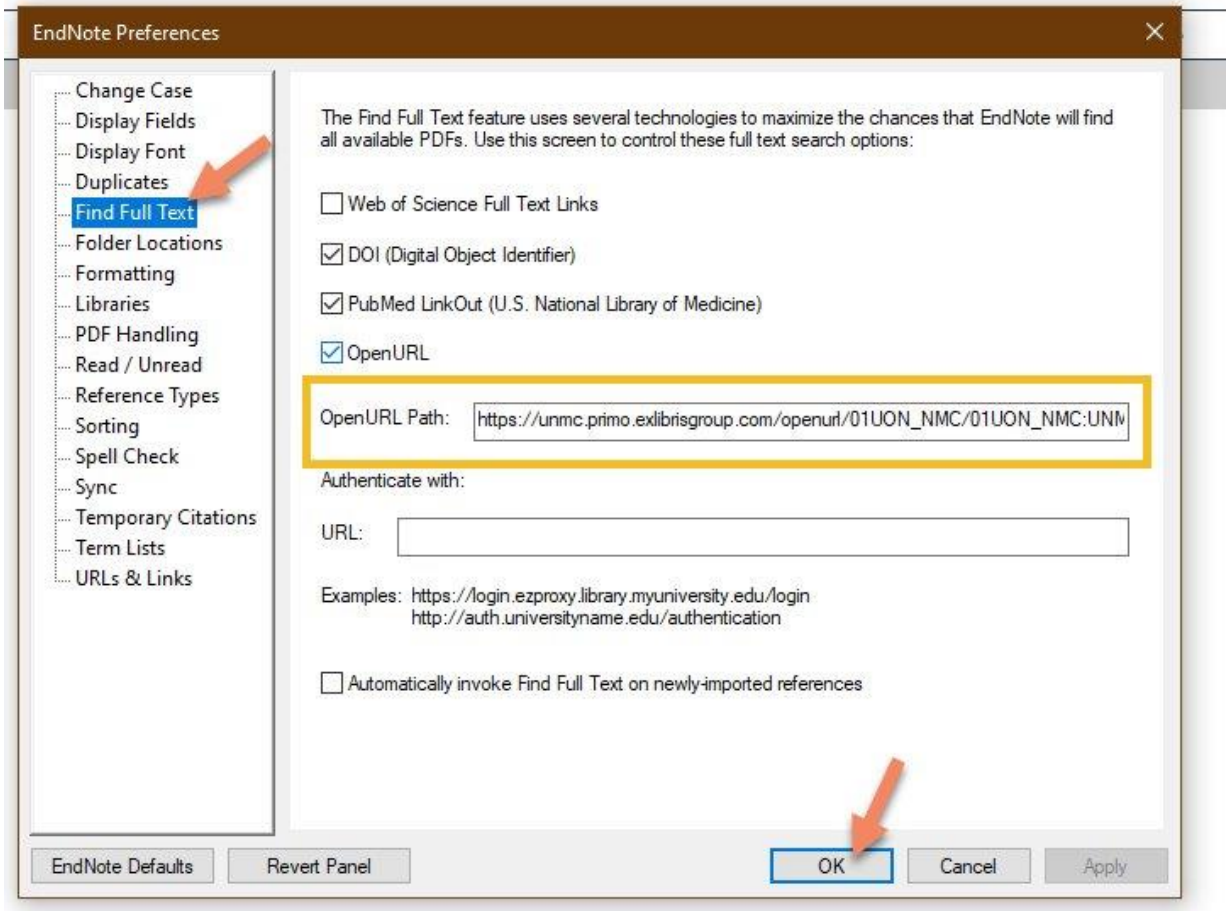
In EndNote, go to **EndNote** > Preferences



Customizing: Full-text

In the preferences table:

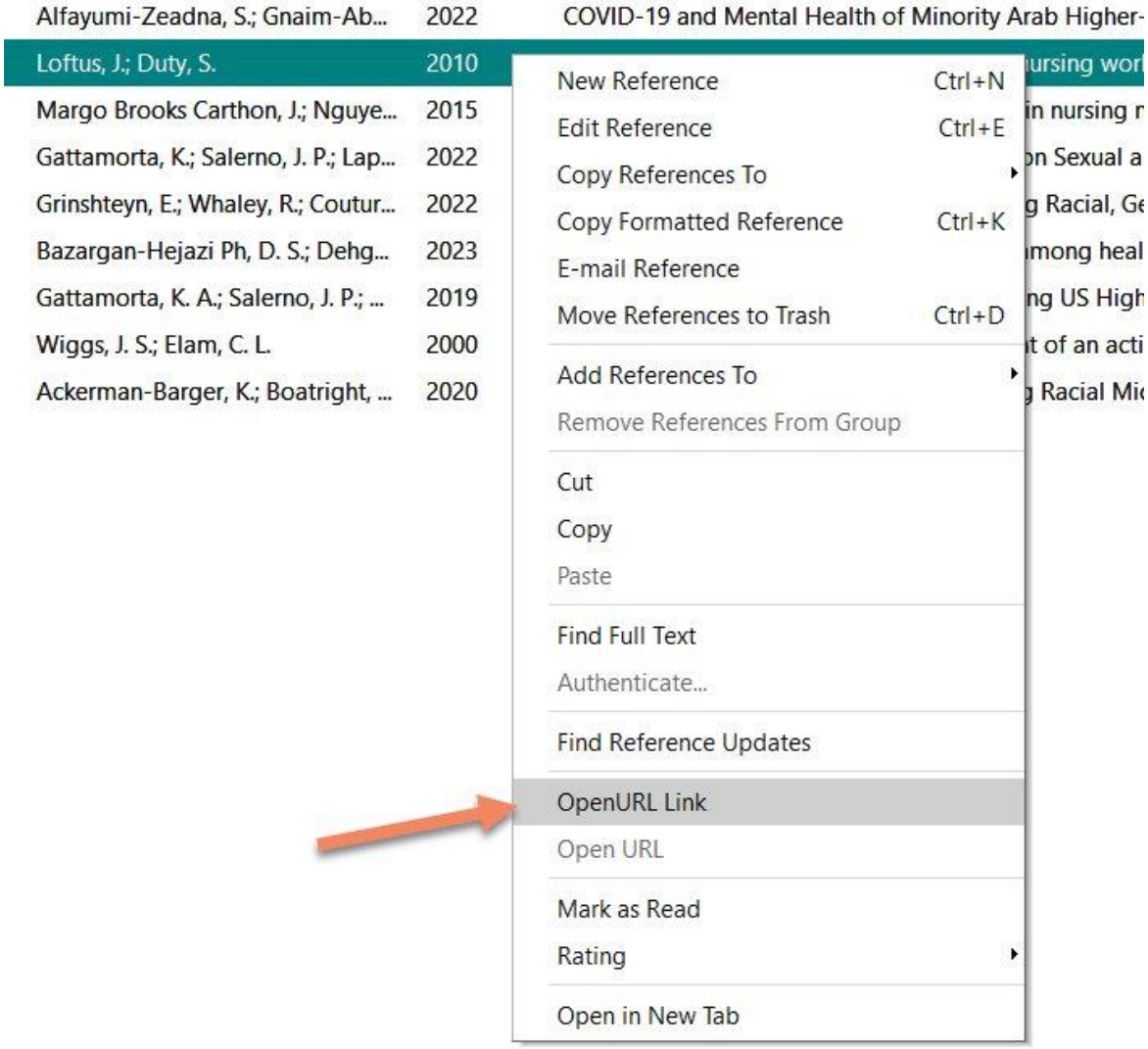
1. Click on **Find full text**
2. Enter in the URL
3. Click OK



URL for EndNote settings:
https://unmc.primo.exlibrisgroup.com/openurl/01UON_NMC/01UON_NMC:UNMC

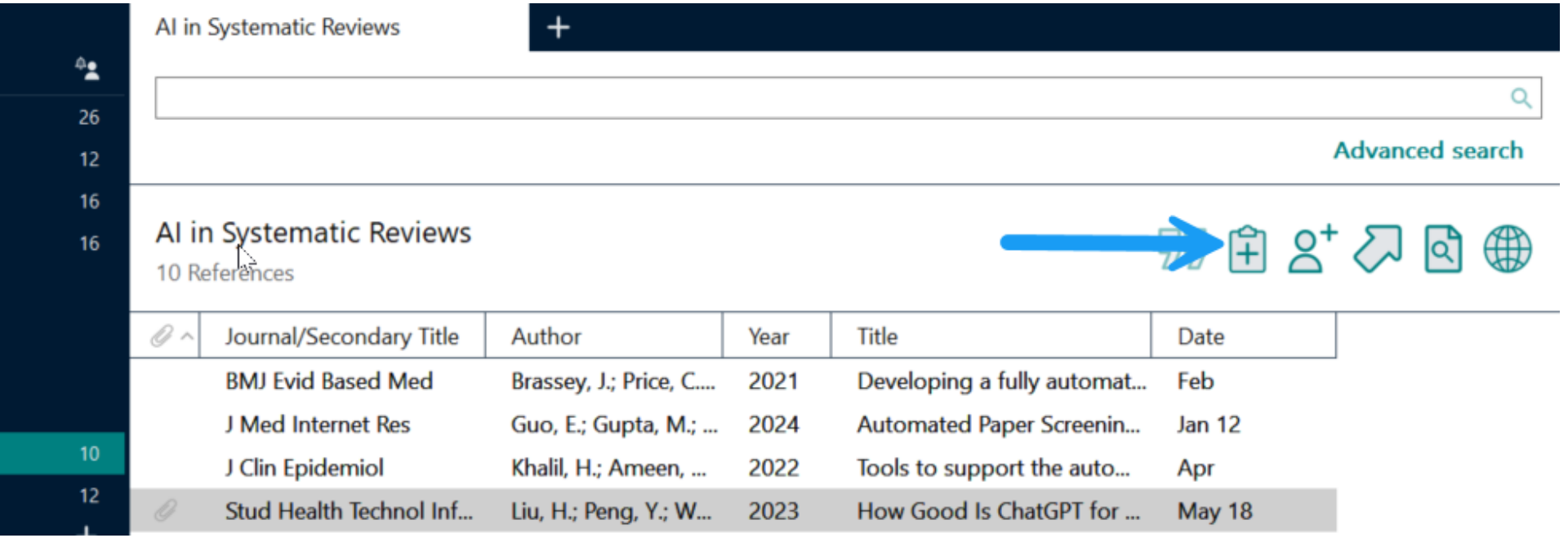
Customizing: Full text

1. In your EndNote library, right click on a citation
2. Click **OpenURL Link** to be directed to the library catalog



Adding Citations

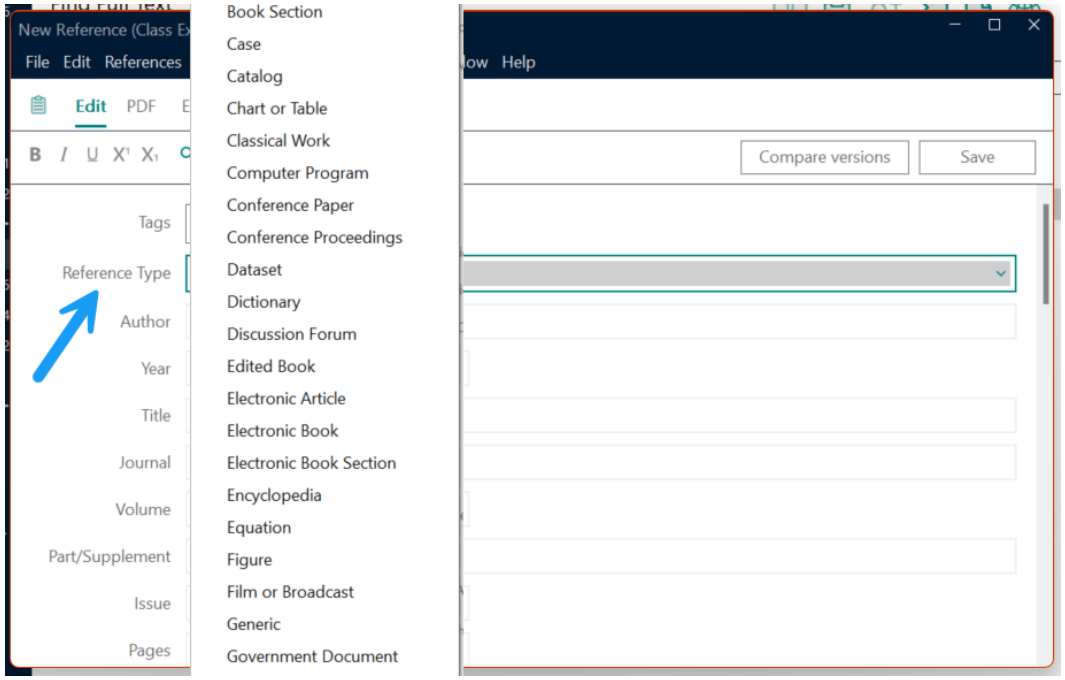
Manually Adding Citations



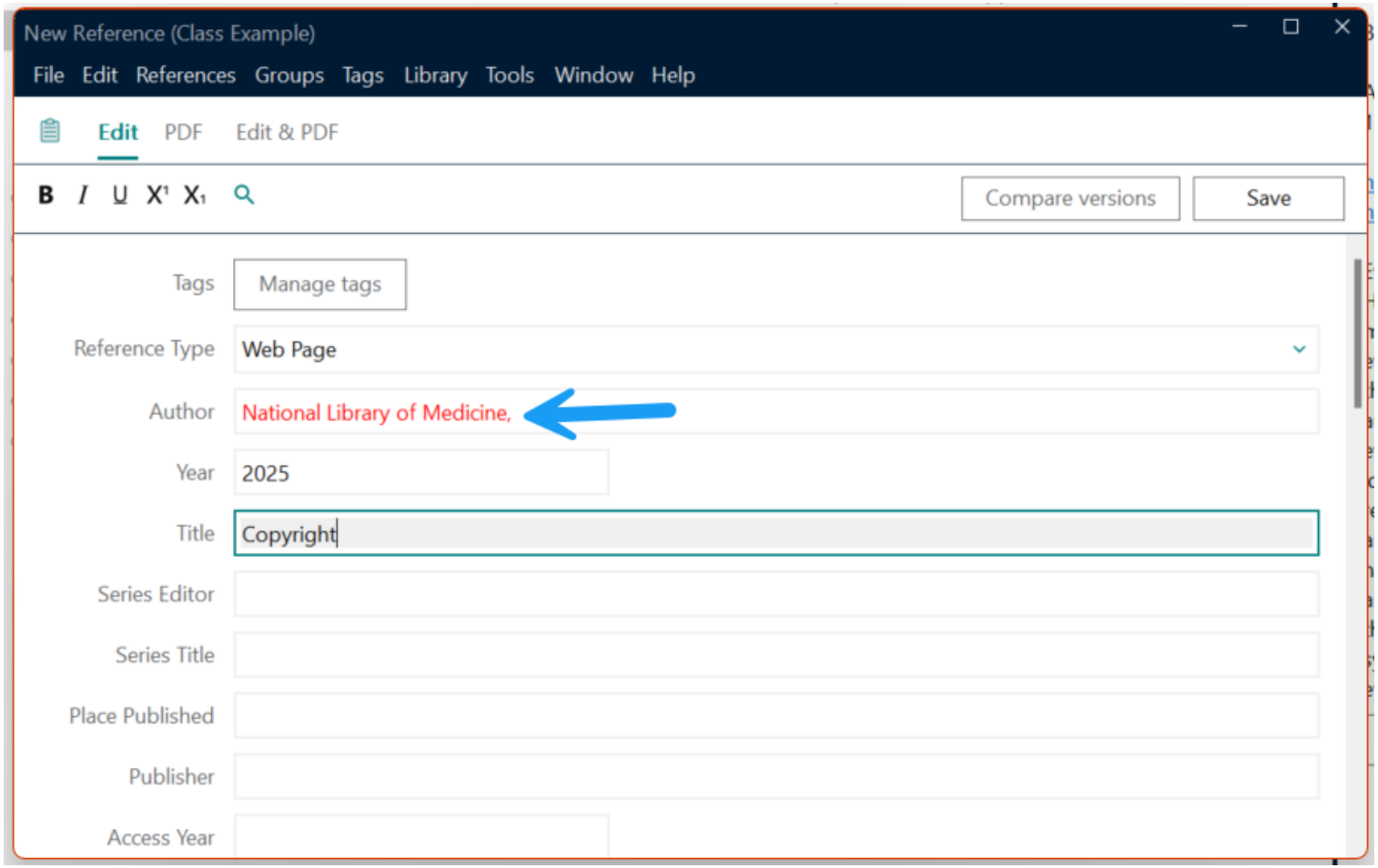
In EndNote, click the Add References icon, or References > New Reference (CTRL + N)

Manually Adding Citations

In the new Window, add your citation information. The default is journal article, but there are many items you can choose from. Fill in the fields you need.

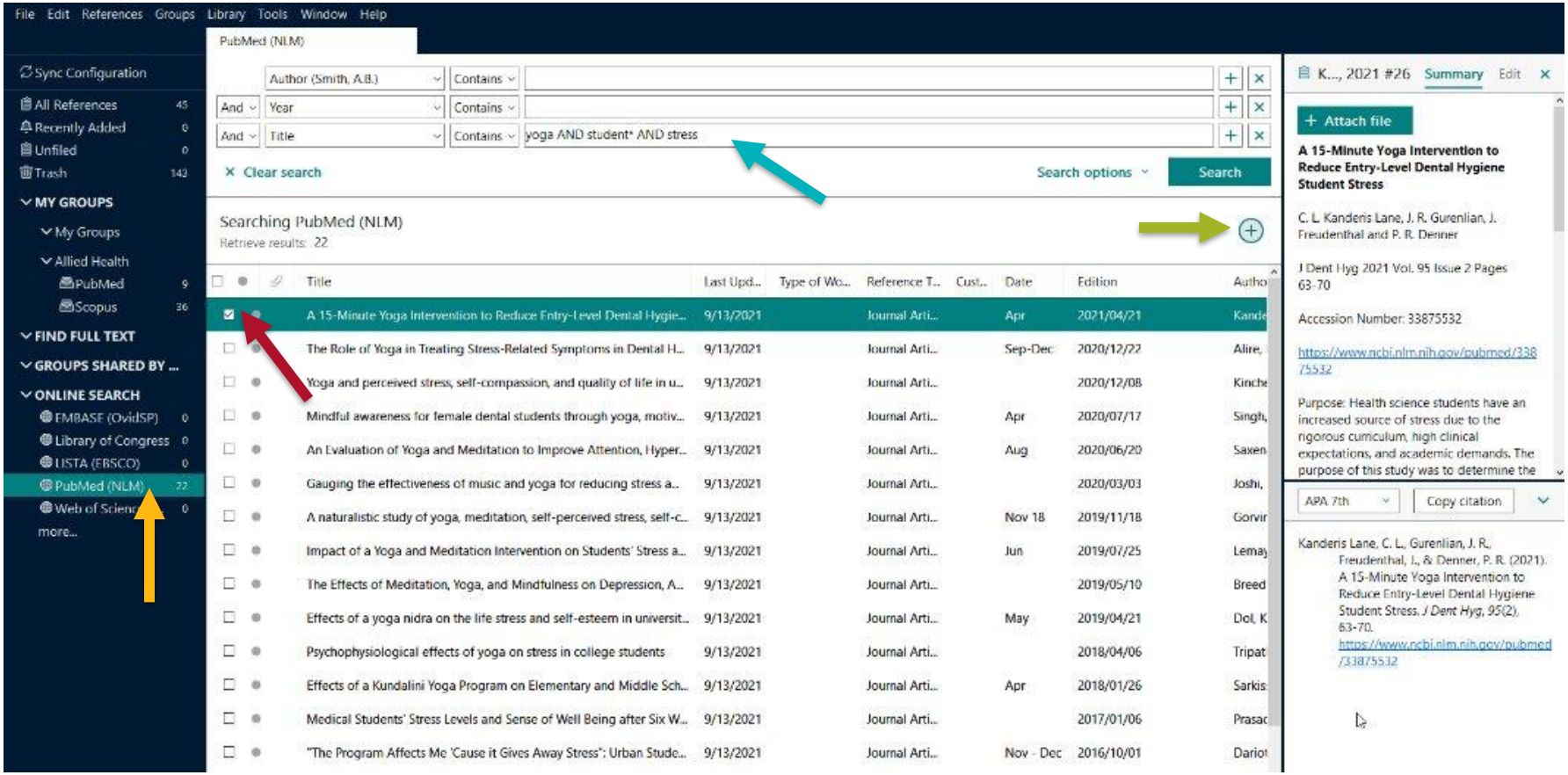


Add a Website



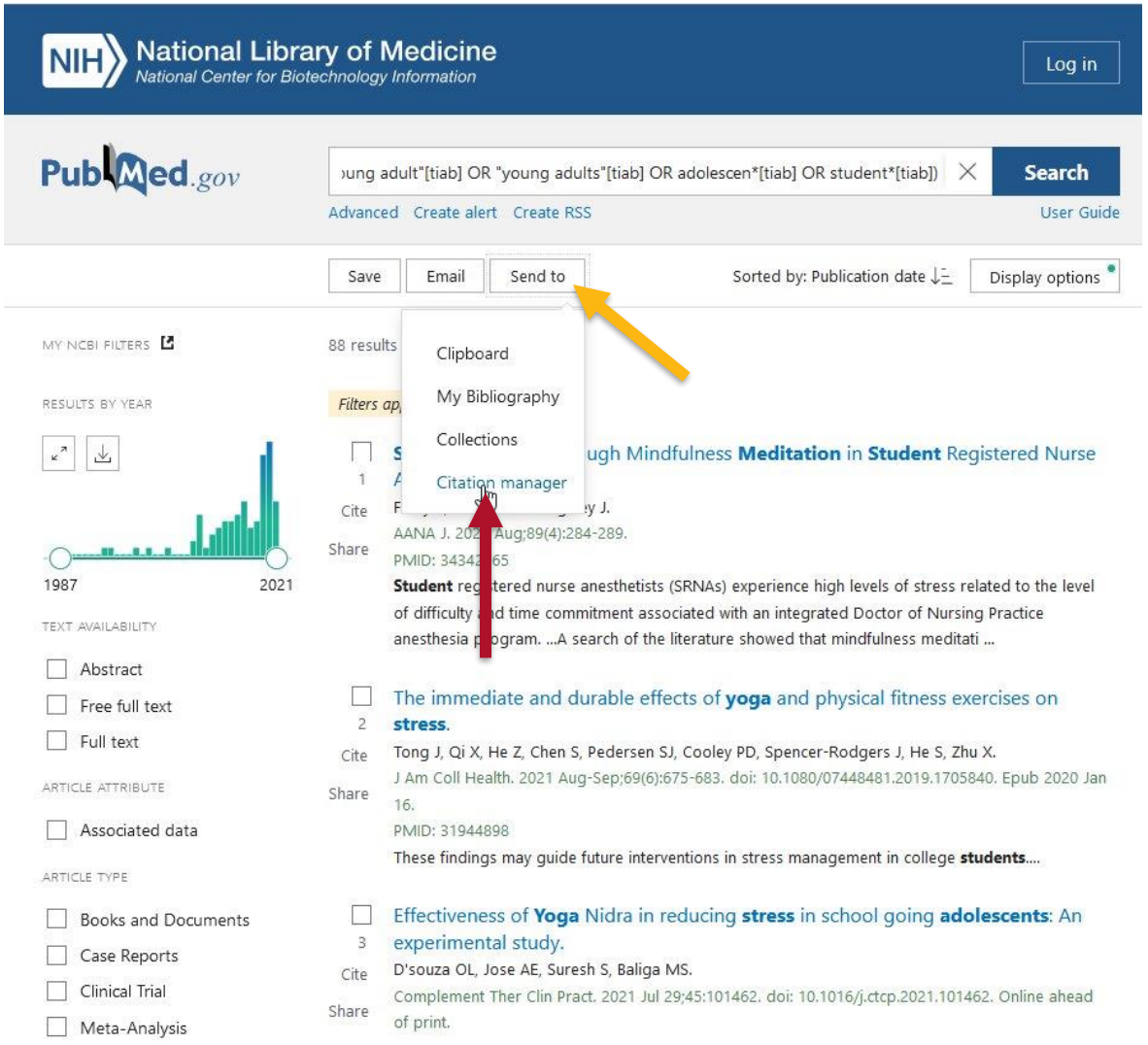
For corporate authors, enter a comma at the end so that EndNote understands there is no surname or initials (ex: National Cancer Institute,)

Search PubMed in EndNote

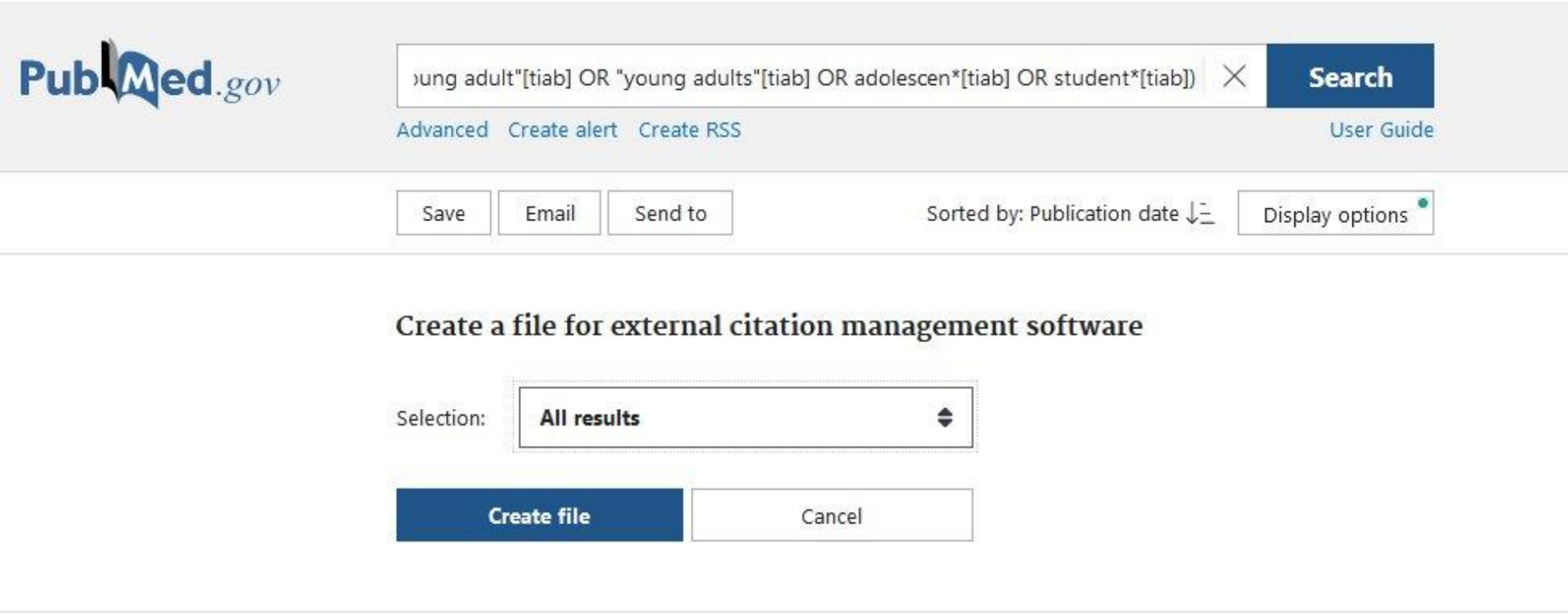


PubMed.gov

1. Open your EndNote Library
2. Create a search in PubMed
3. Click on the **Send to** button
4. Select the Citation manager option

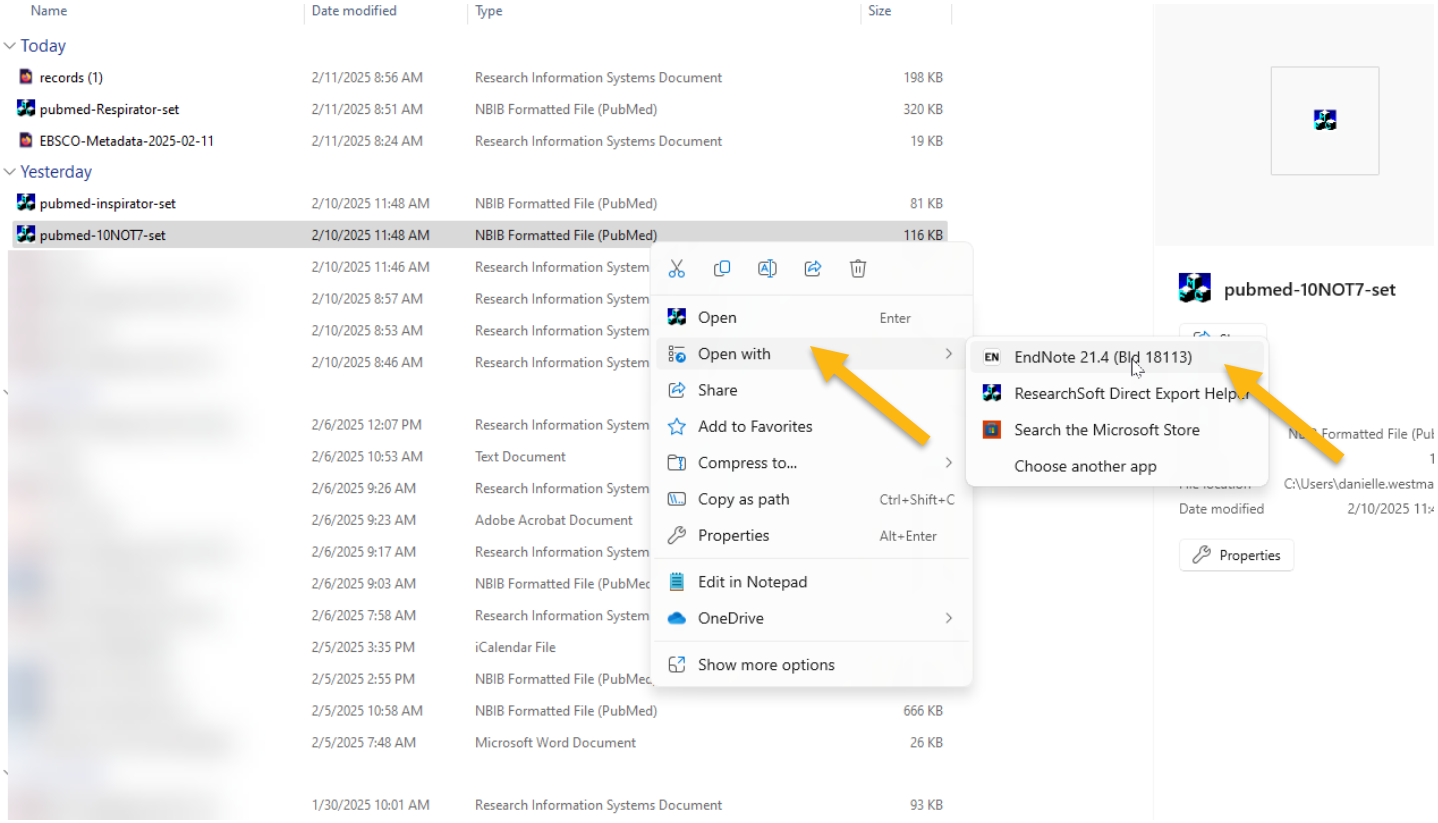


PubMed.gov



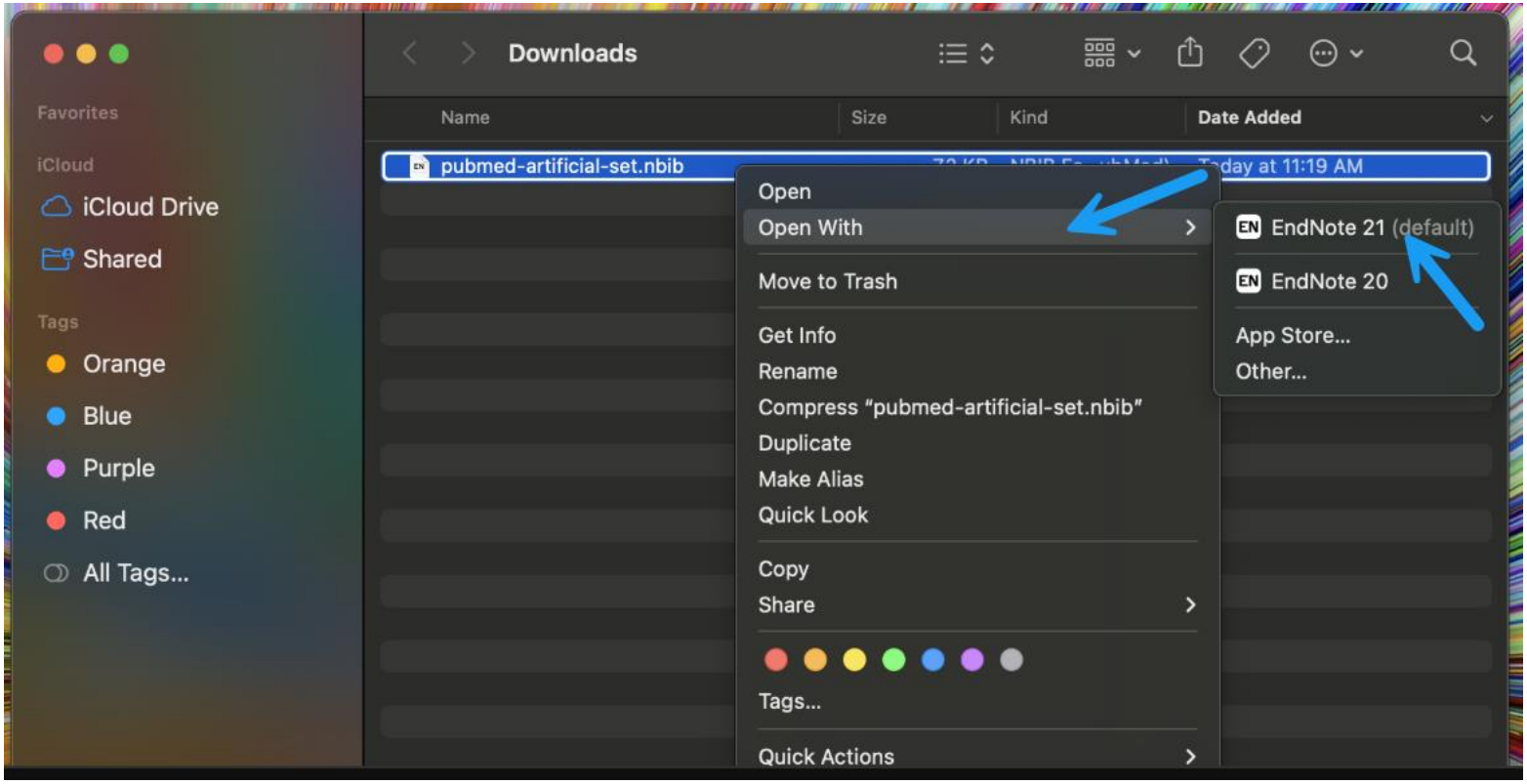
1. Choose your **Selection** (All Results, Results on this page, Selected)
2. Click on **Create File**

PubMed.gov (Windows)



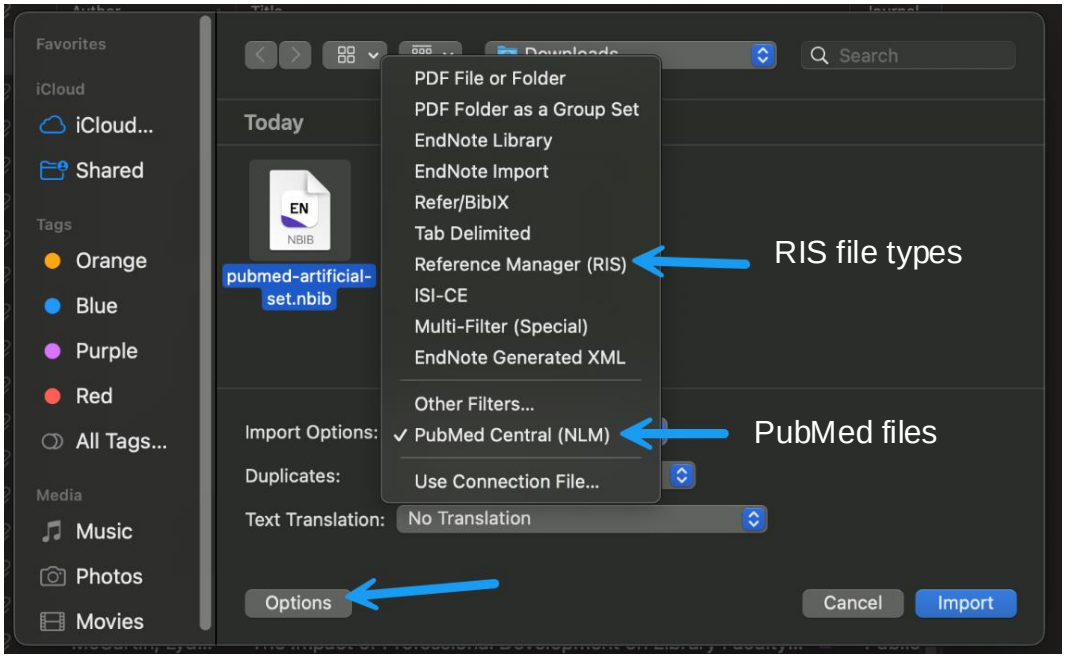
1. In your **Downloads** folder, find your .nbib file
2. Right click the file and choose **Open With …** select EndNote
3. If you don’t see EndNote as an option, click on Choose another app to search

PubMed.gov (Mac)



1. In your **Downloads** folder, find your .nbib file
2. Right click the file and choose **Open With …** select EndNote
3. If you don't see EndNote as an option, click on Other… to choose EndNote

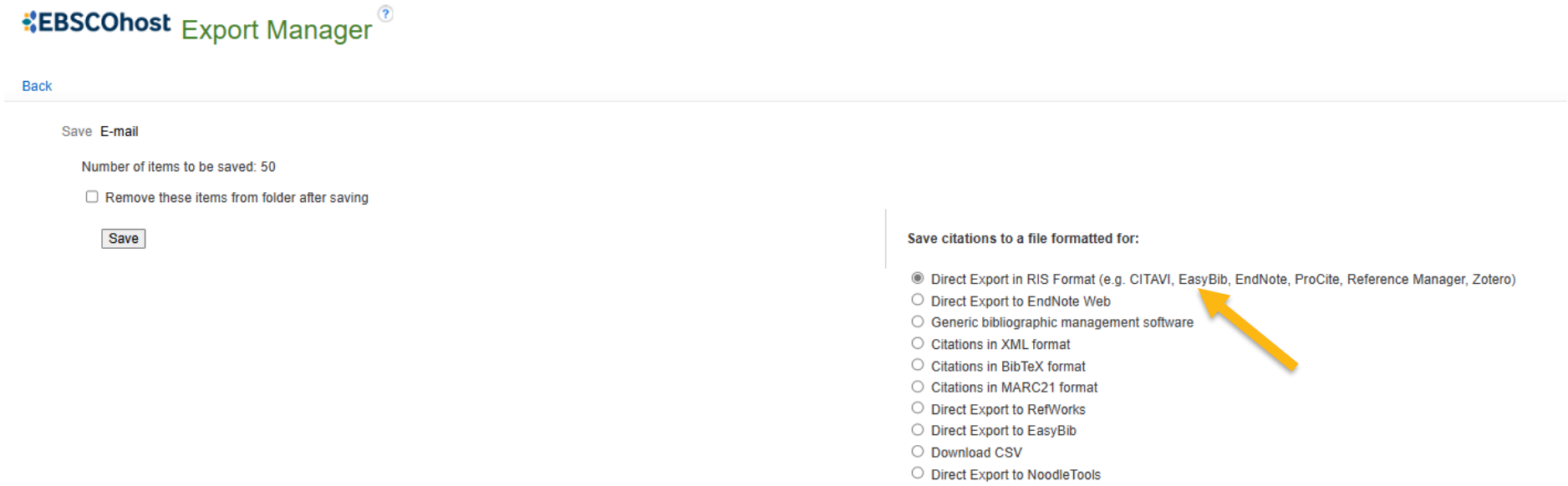
PubMed.gov (Mac)



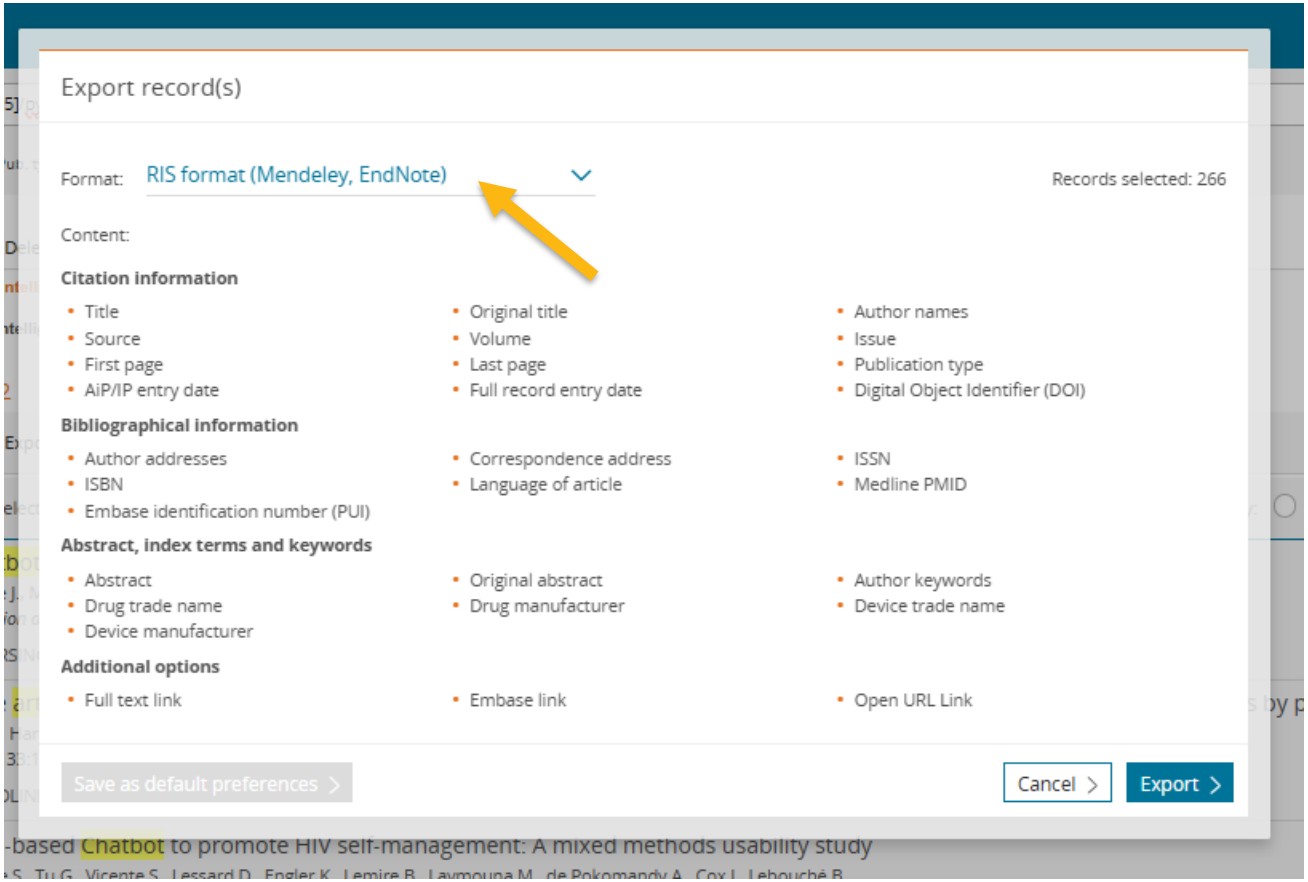
1. File > Import
2. Click Options to select Import file type
3. PubMed for PubMed files, RIS for other literature databases
4. If you don't see PubMed in your list of options, click Other Filters… to search

EBSCO Databases

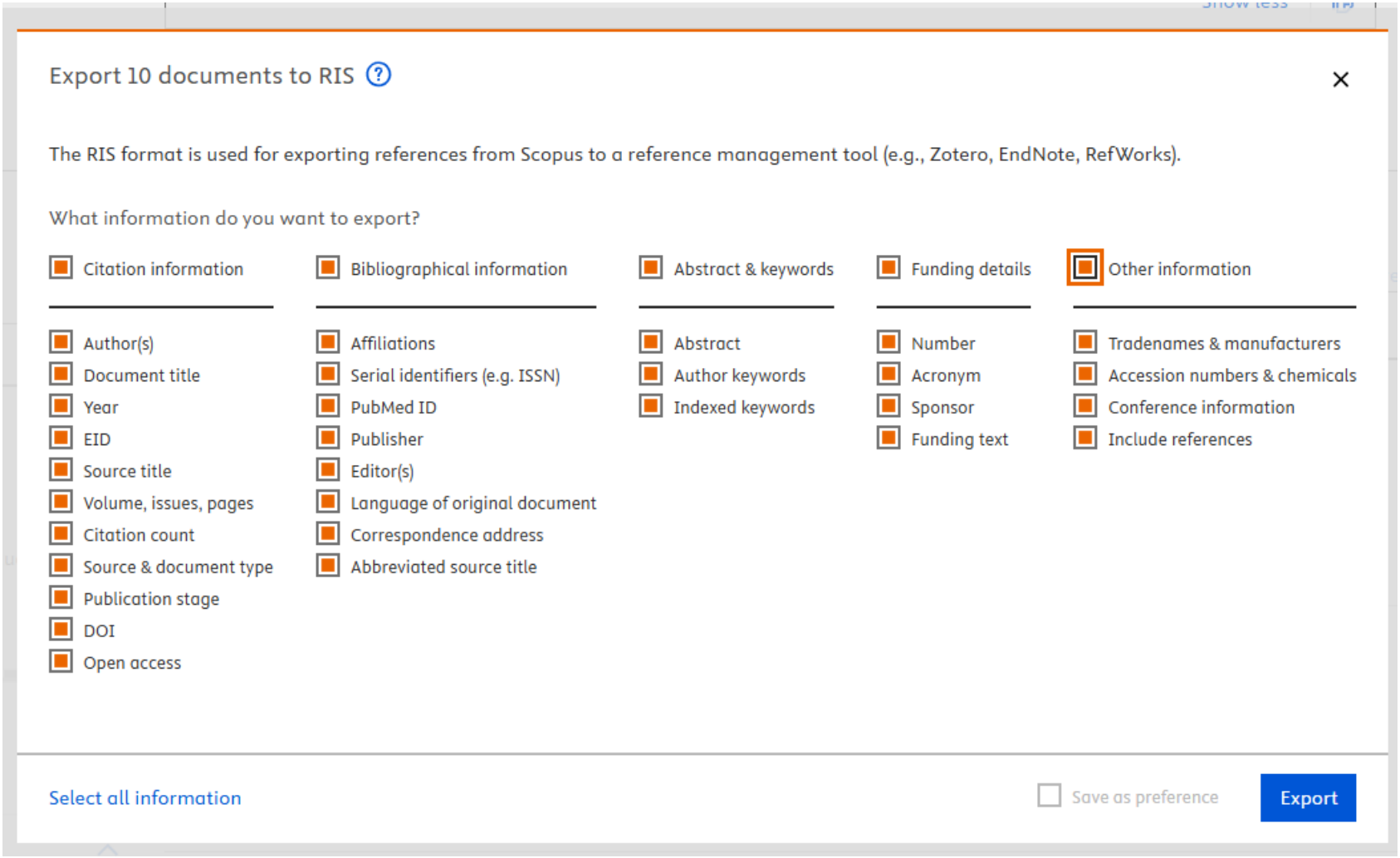
- Searching CINAHL, PsycINFO, ERIC, MEDLINE
  - Use the .ris file when exporting
  - Right click file to add to EndNote



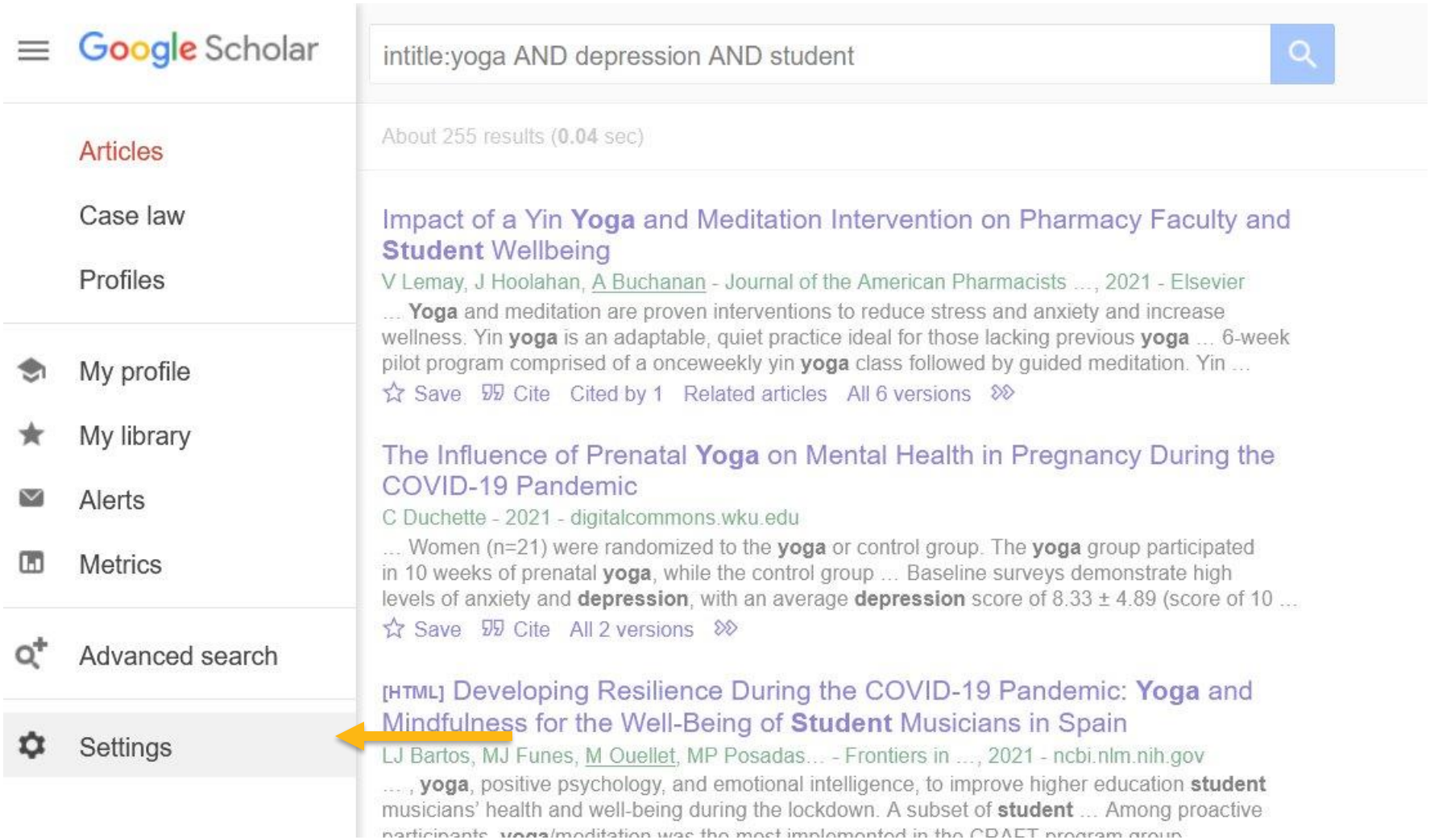
Embase Database



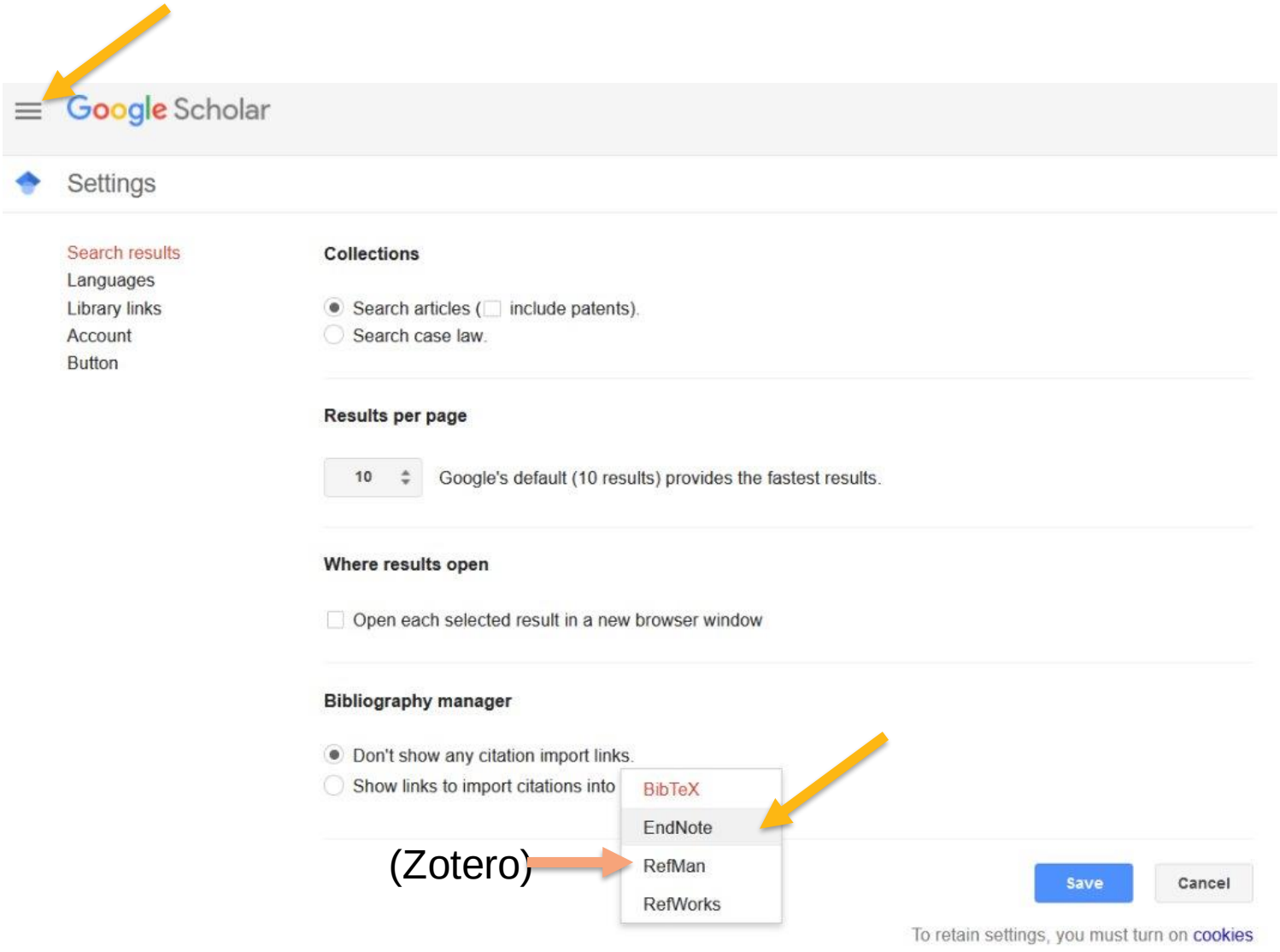
Scopus Database



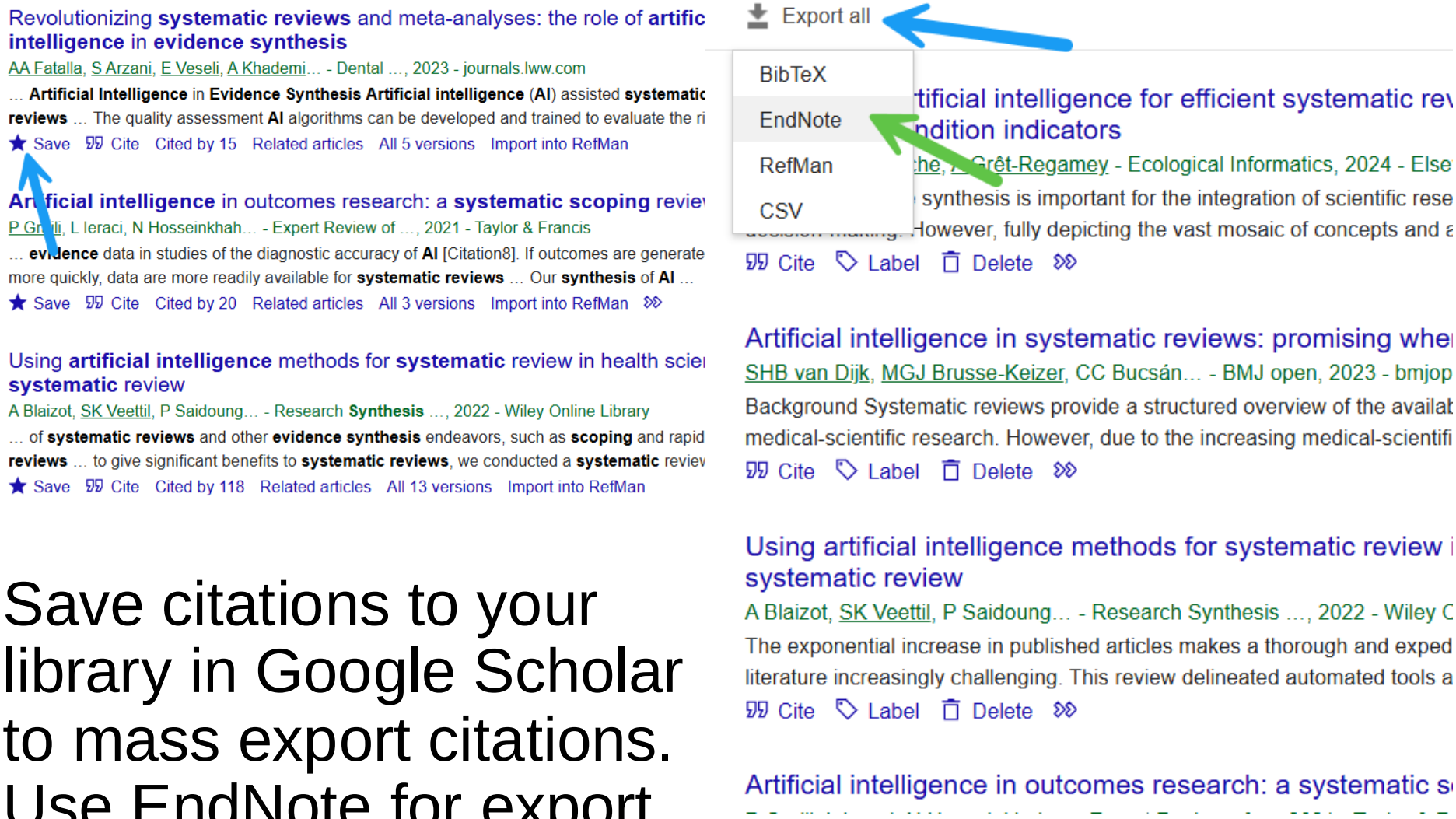
Google Scholar



Google Scholar



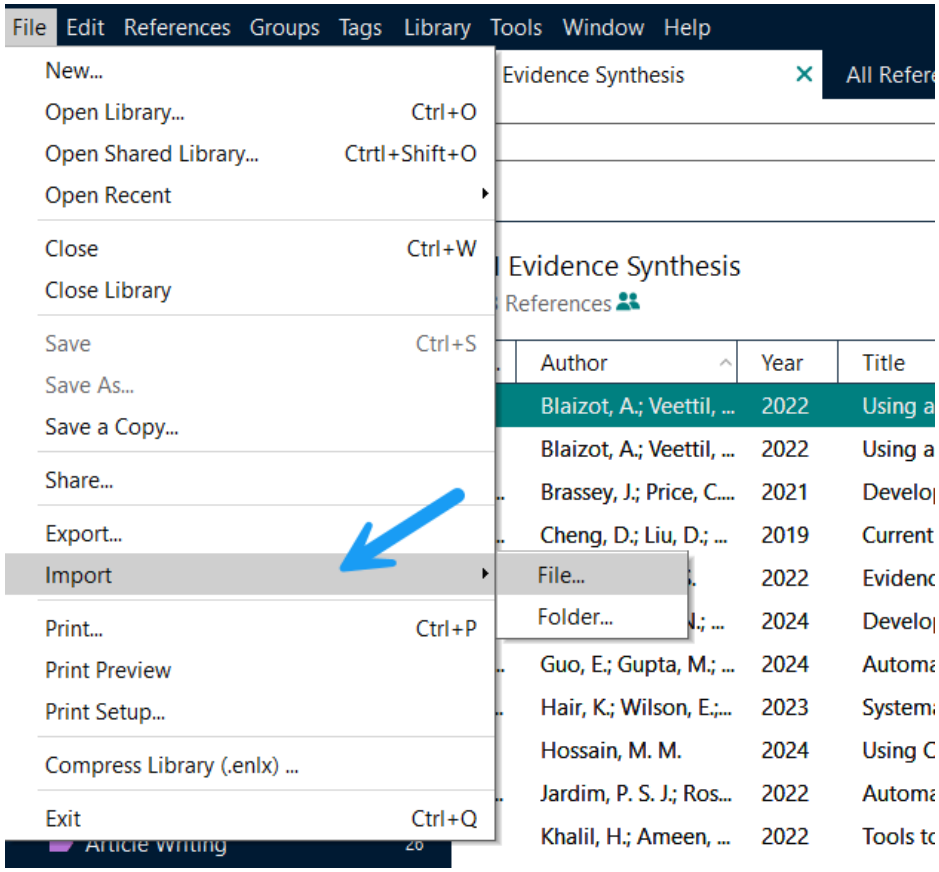
Export from Google Scholar Library



Save citations to your library in Google Scholar to mass export citations. Use EndNote for export.

Live Demonstration

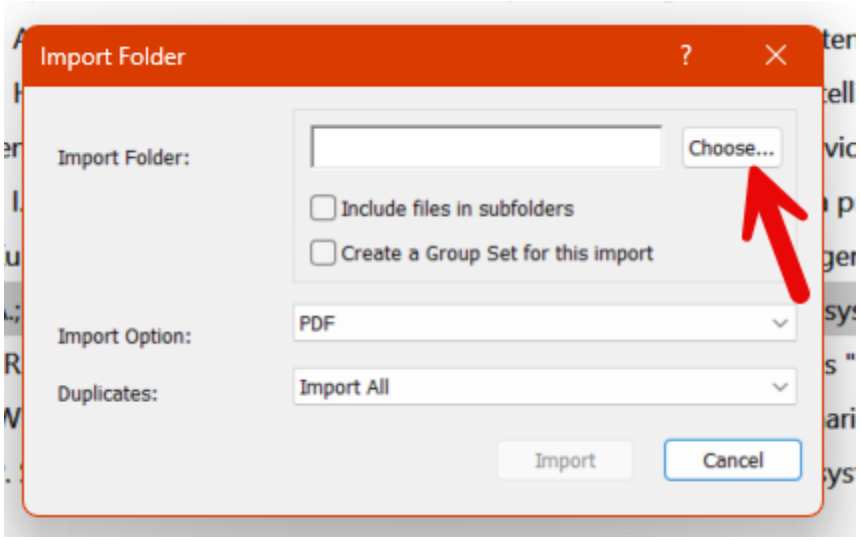
Import PDFs

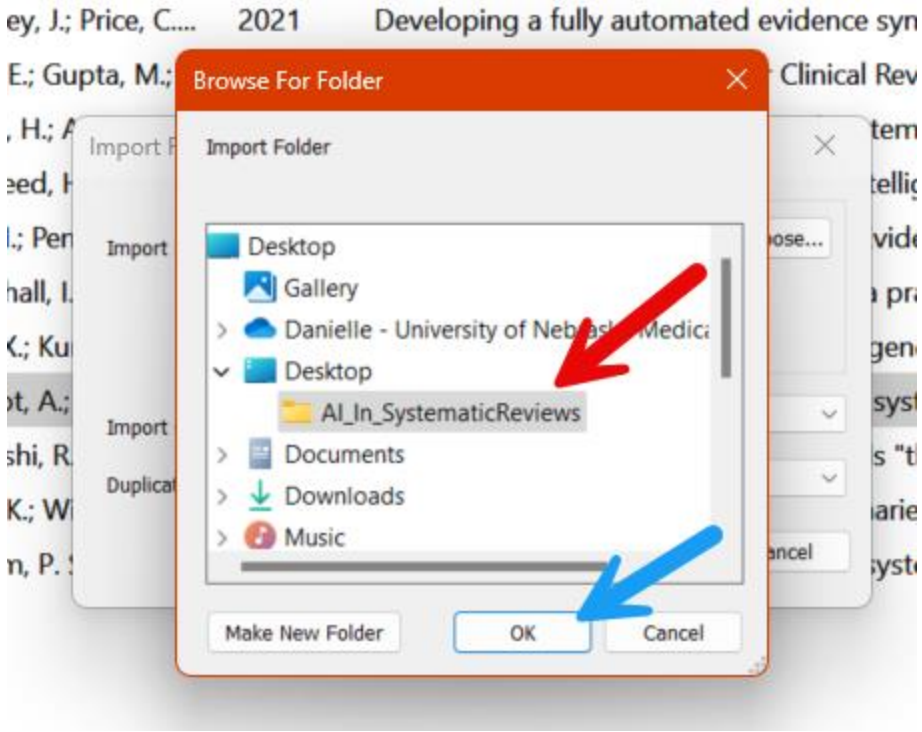


1. In EndNote, go to **File** > Import.
2. Select File or Folder

EndNote can create citation records from PDFs. If you have **multiple PDFs** to add, place them in a **folder** for a quicker import process. Folder can only be used for PDFs

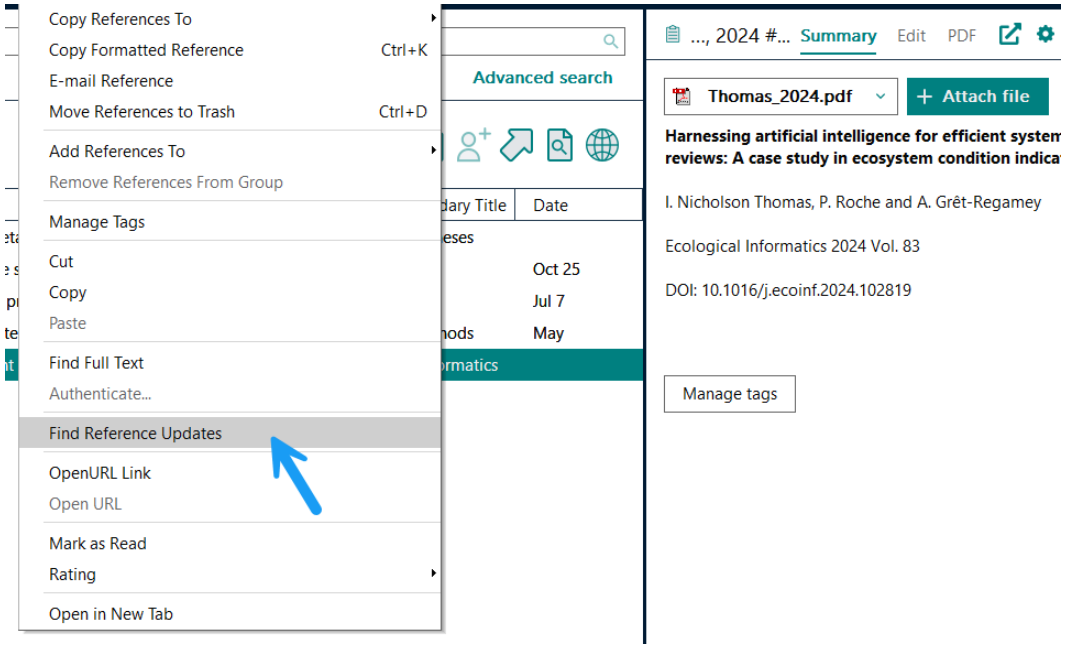
Import PDFs (Folders)





Import PDFs

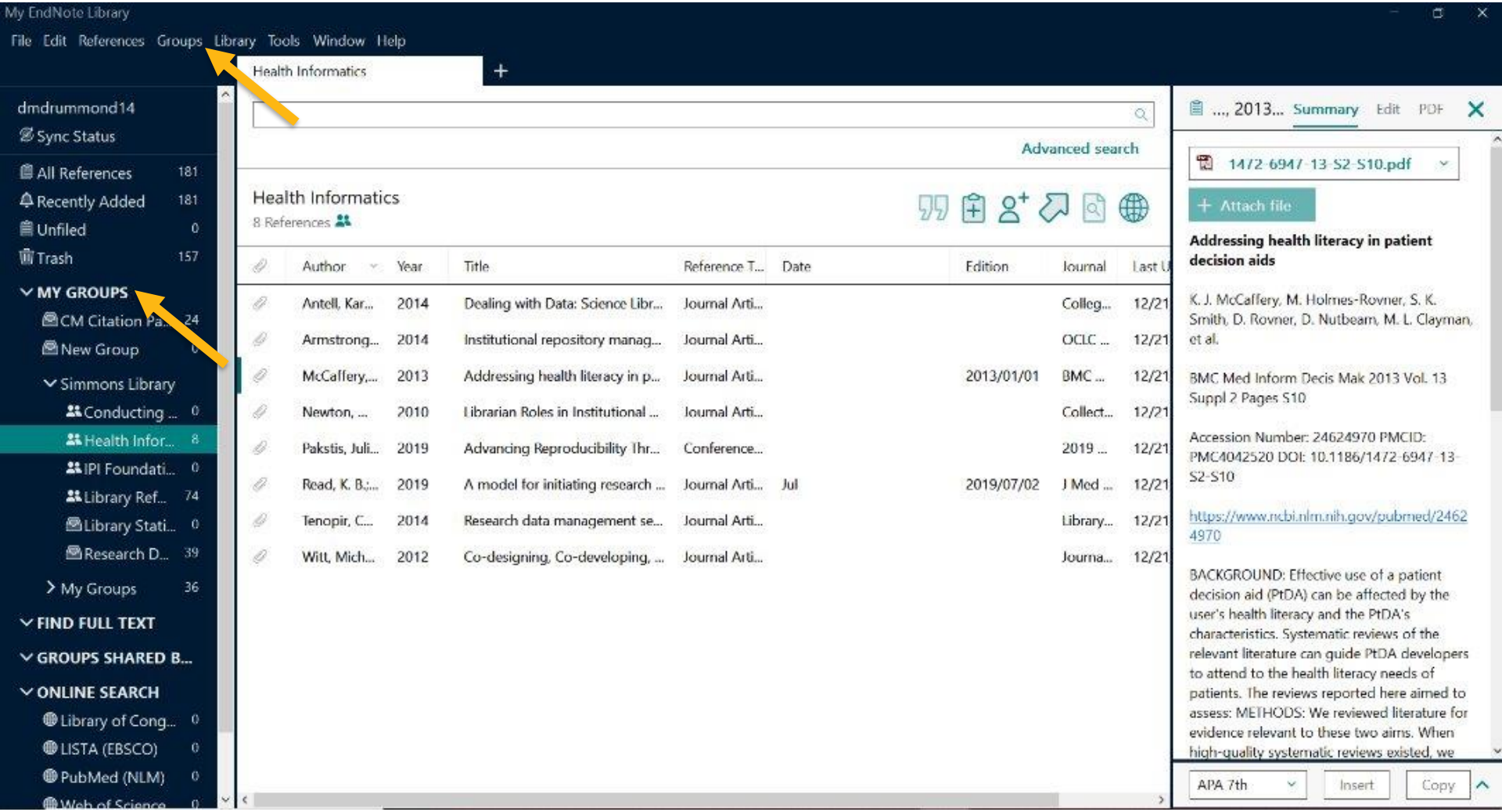
When importing PDFs, those that have good metadata (ex: PDF's that come from a library subscribed journal), will be able to fill in citation fields.



Use the Find Reference Updates feature to find any missing citation fields. (date, abstract, etc.)

Groups & Sharing

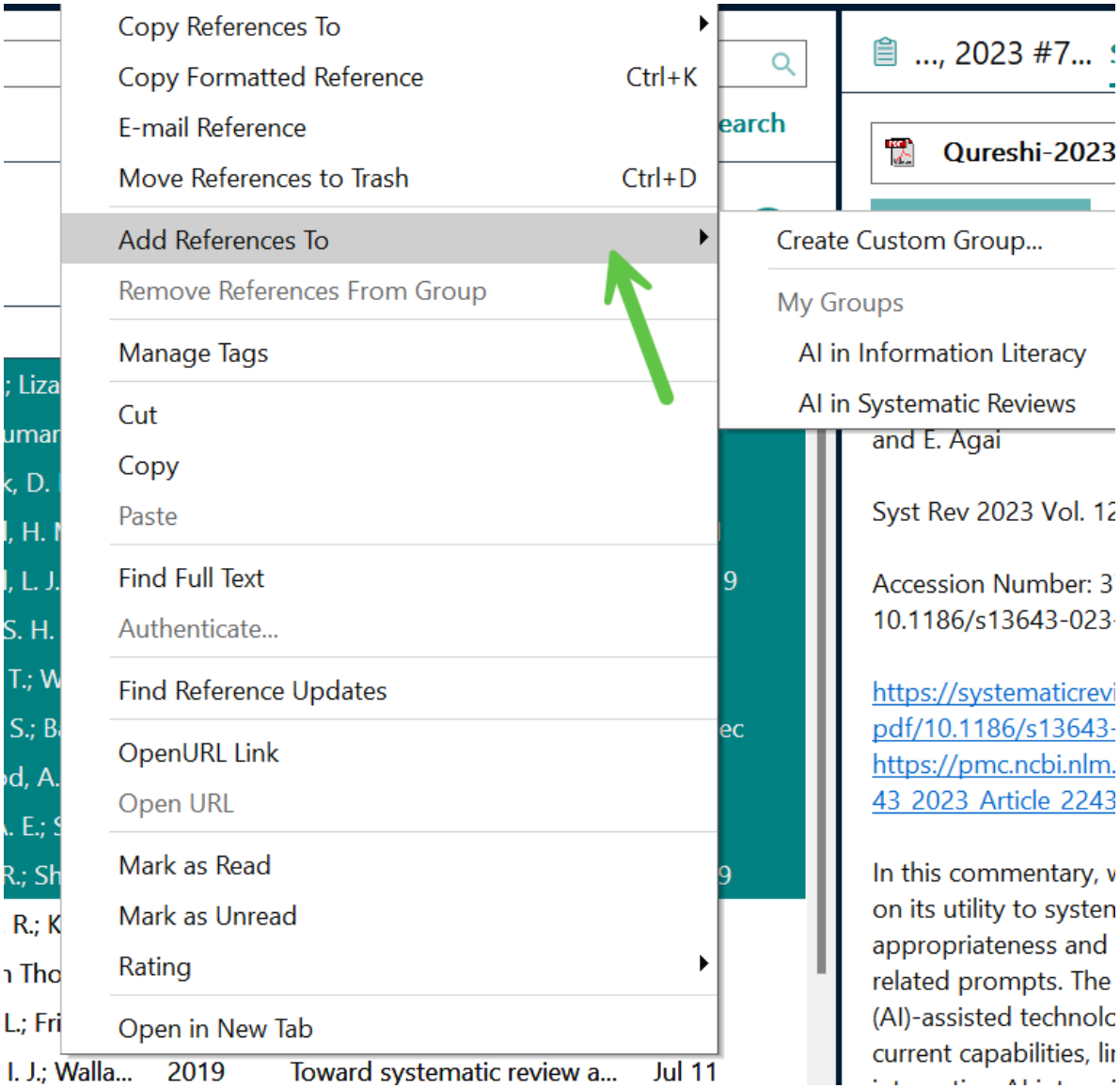
Create a Group



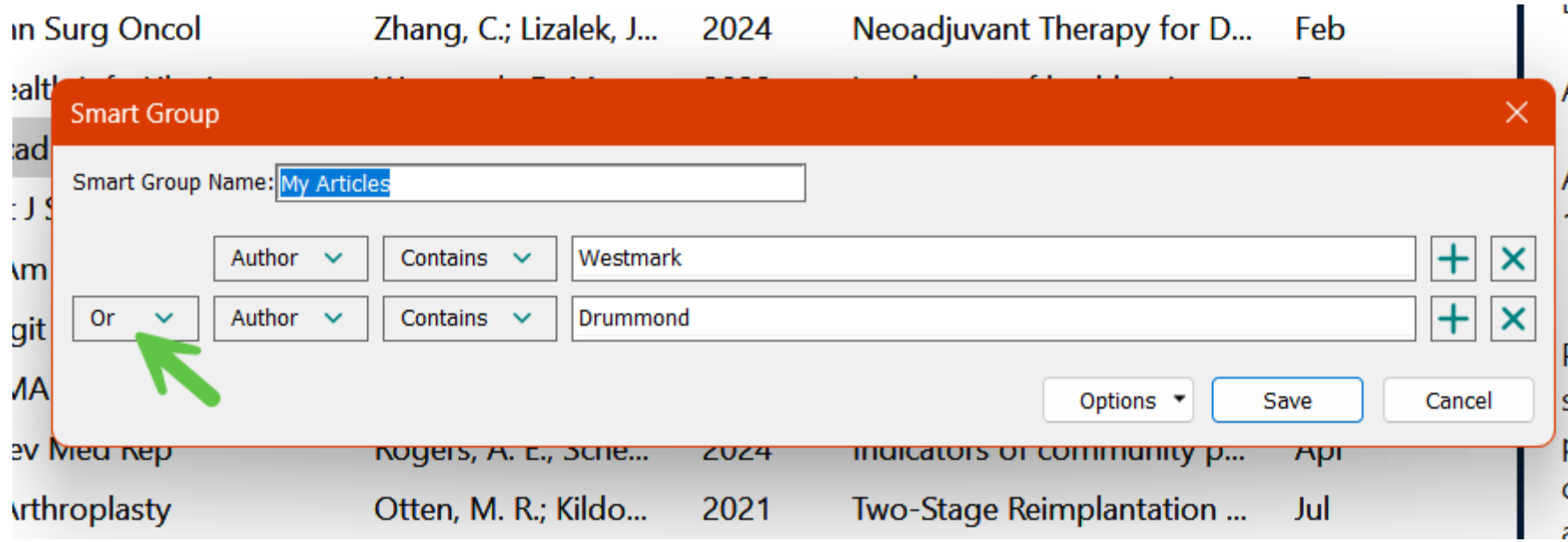
Right click My Groups and select Create Groups. Or go to the Groups menu and select Create Group

Adding References to Groups

Drag and drop citation records to groups or right click to add to a group.



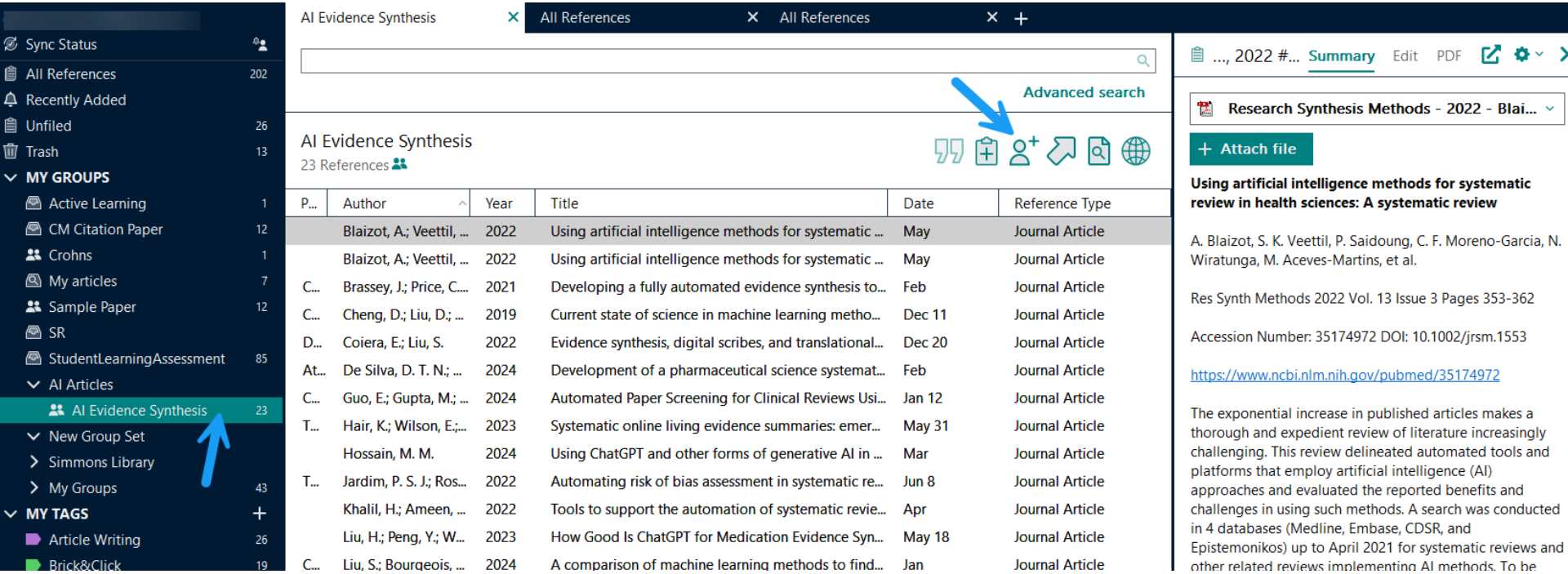
Smart Groups



Auto add citation records to groups by adding specific keywords, author names, etc.

1. Add keywords and the fields
2. Use the **AND** if you want articles with both keywords/names in the article
3. Use **OR** for either or

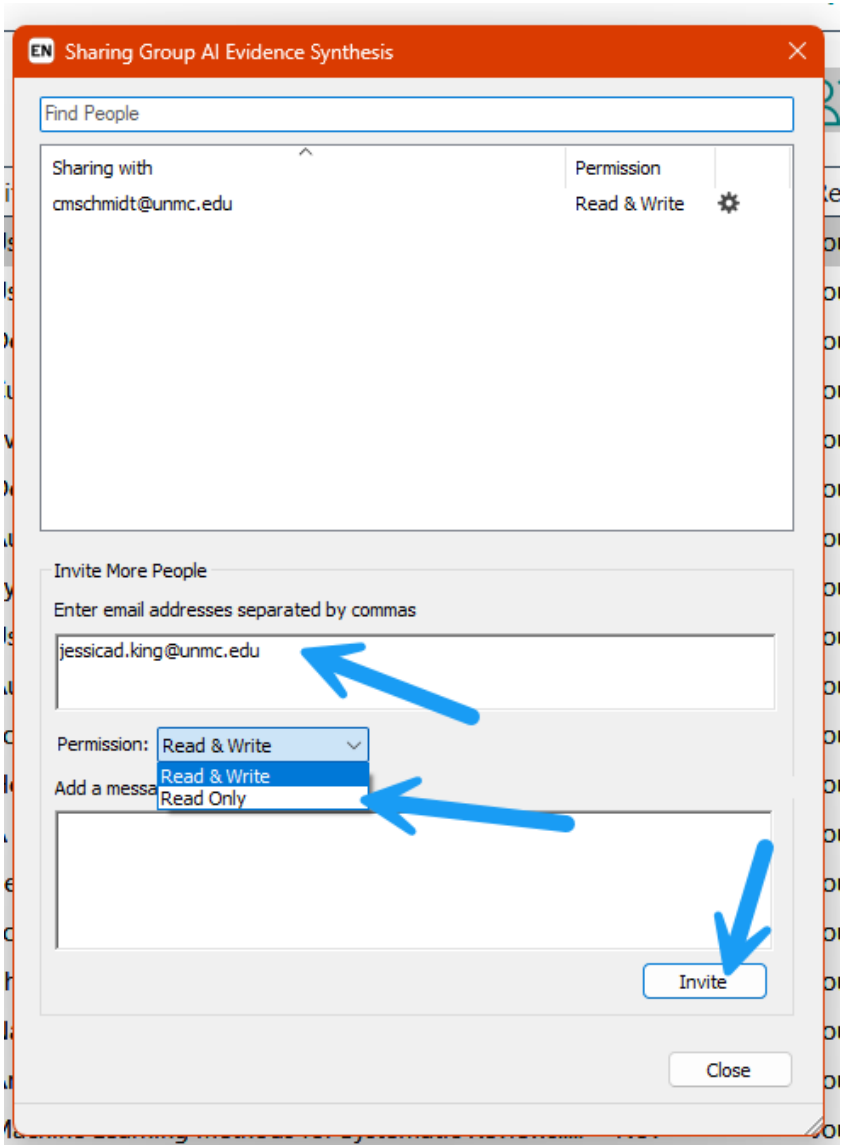
Sharing a Group



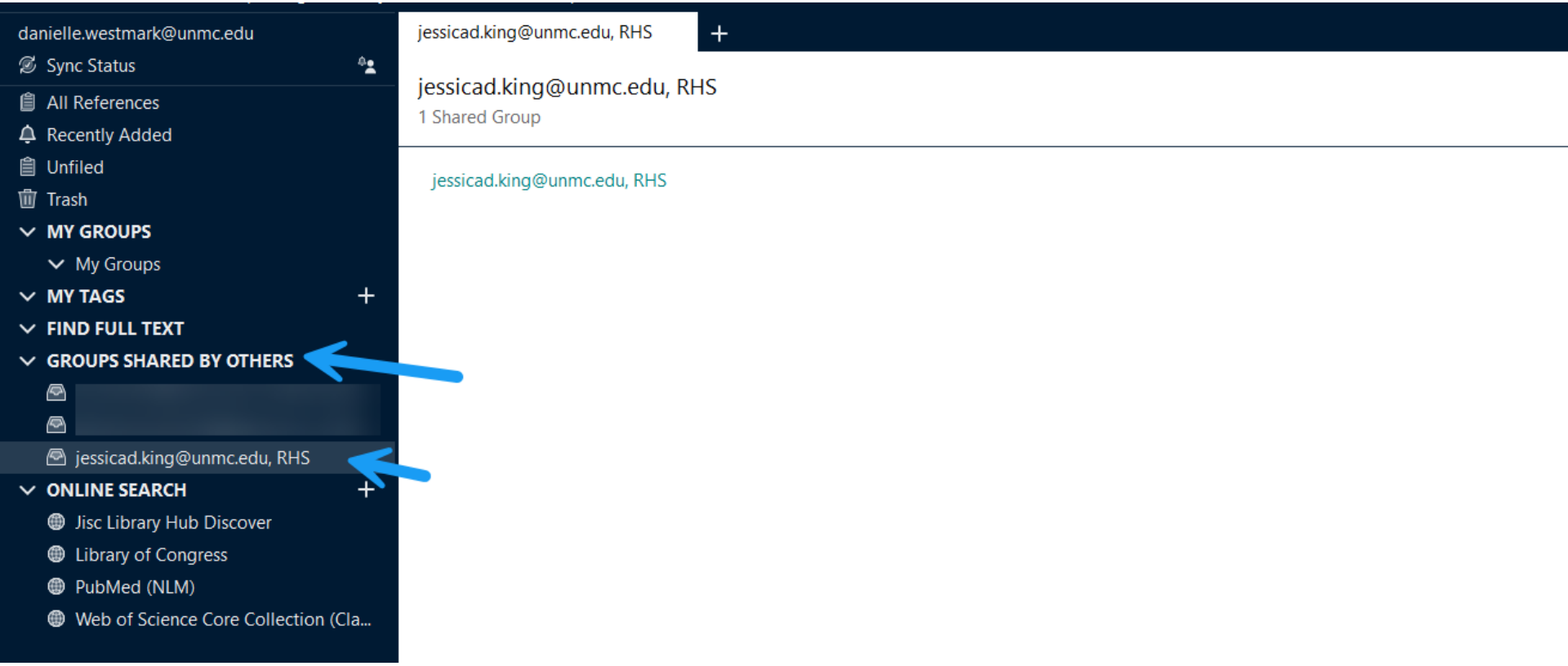
1. Select the group you want to share
2. Click the Share button (or go to Groups > Share Group)

Share a Group

1. Add email address
2. The invitee will receive an email with instructions to access



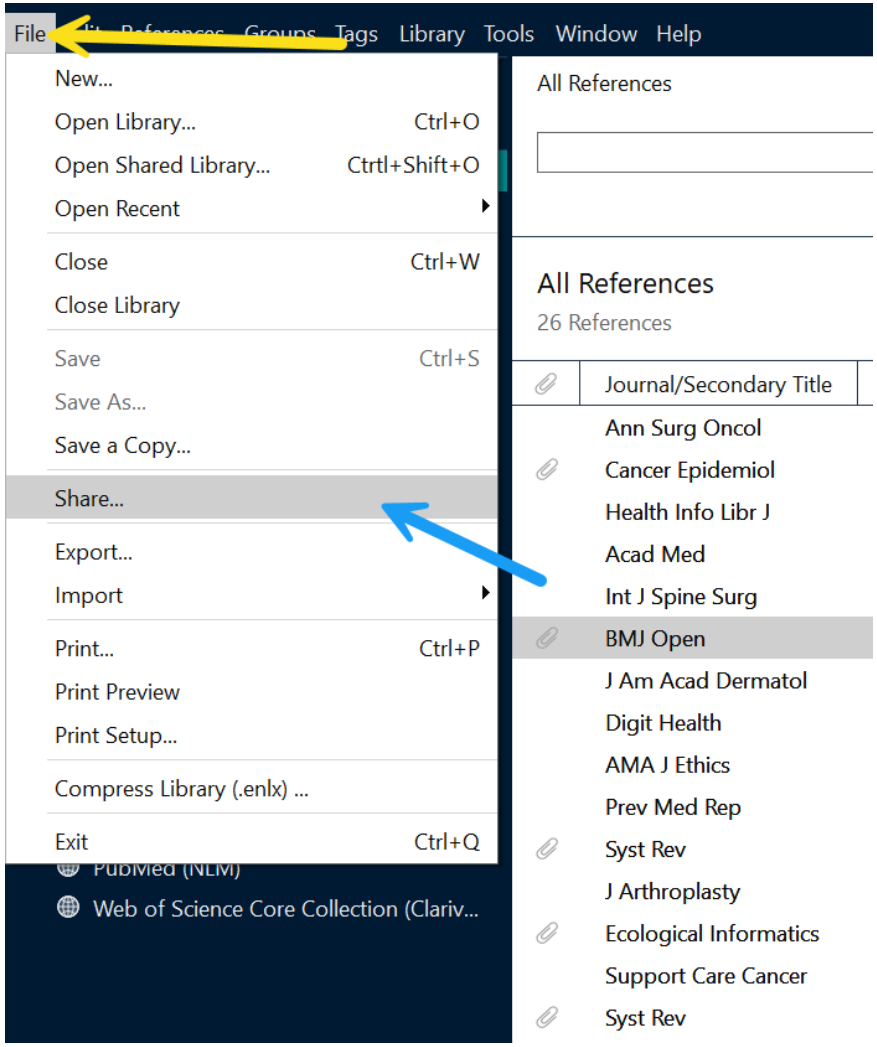
Open a Shared Group



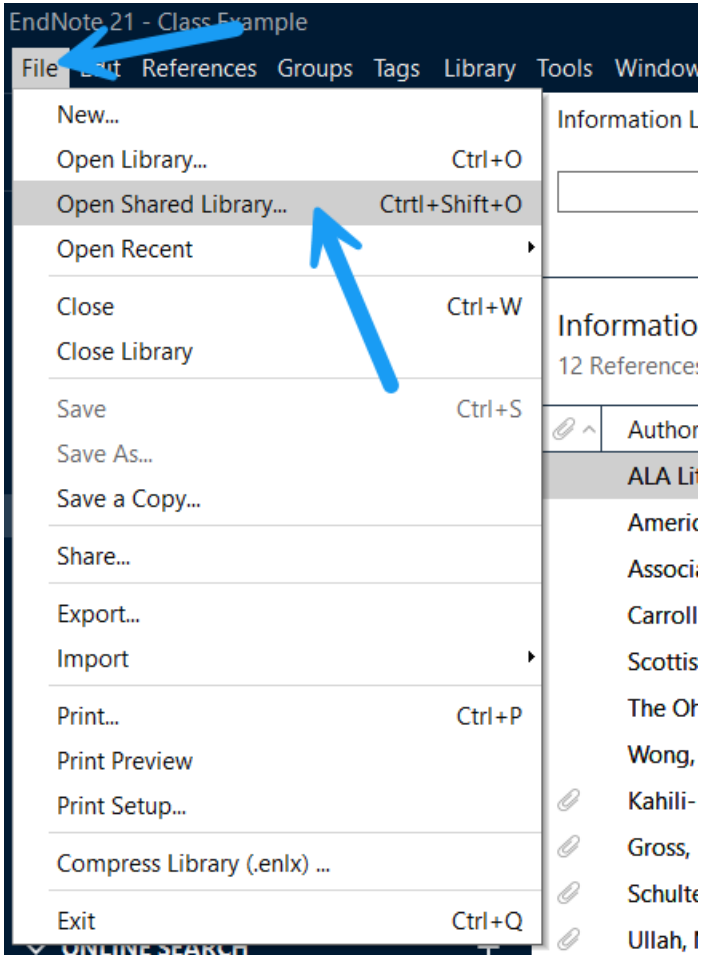
Groups that have been shared with you (where you are not the original owner) will appear under Groups Shared by Others.

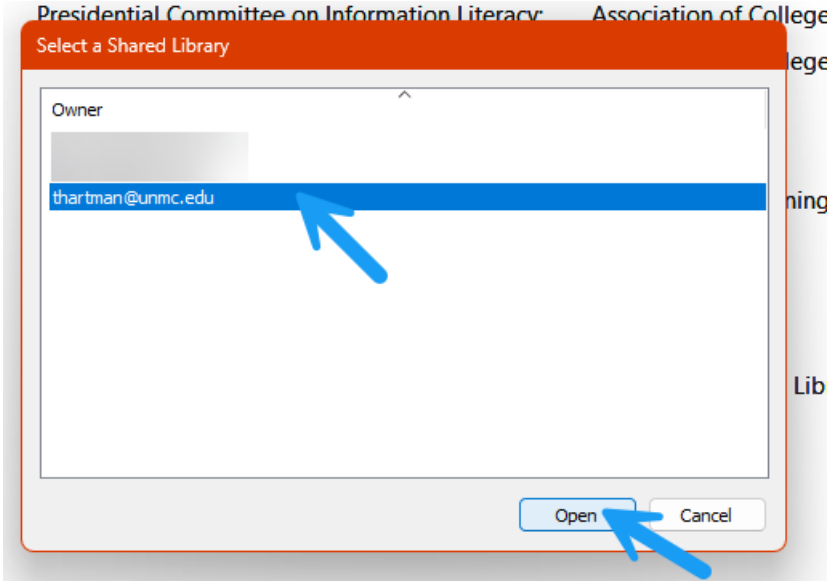
Sharing Your Library

1. File > Share
2. Enter email addresses
    1. Access to entire library, including all groups
    2. Does NOT include groups SHARED to you by others
3. You can only share 1 EndNote library per EndNote online account



Open a Shared Library

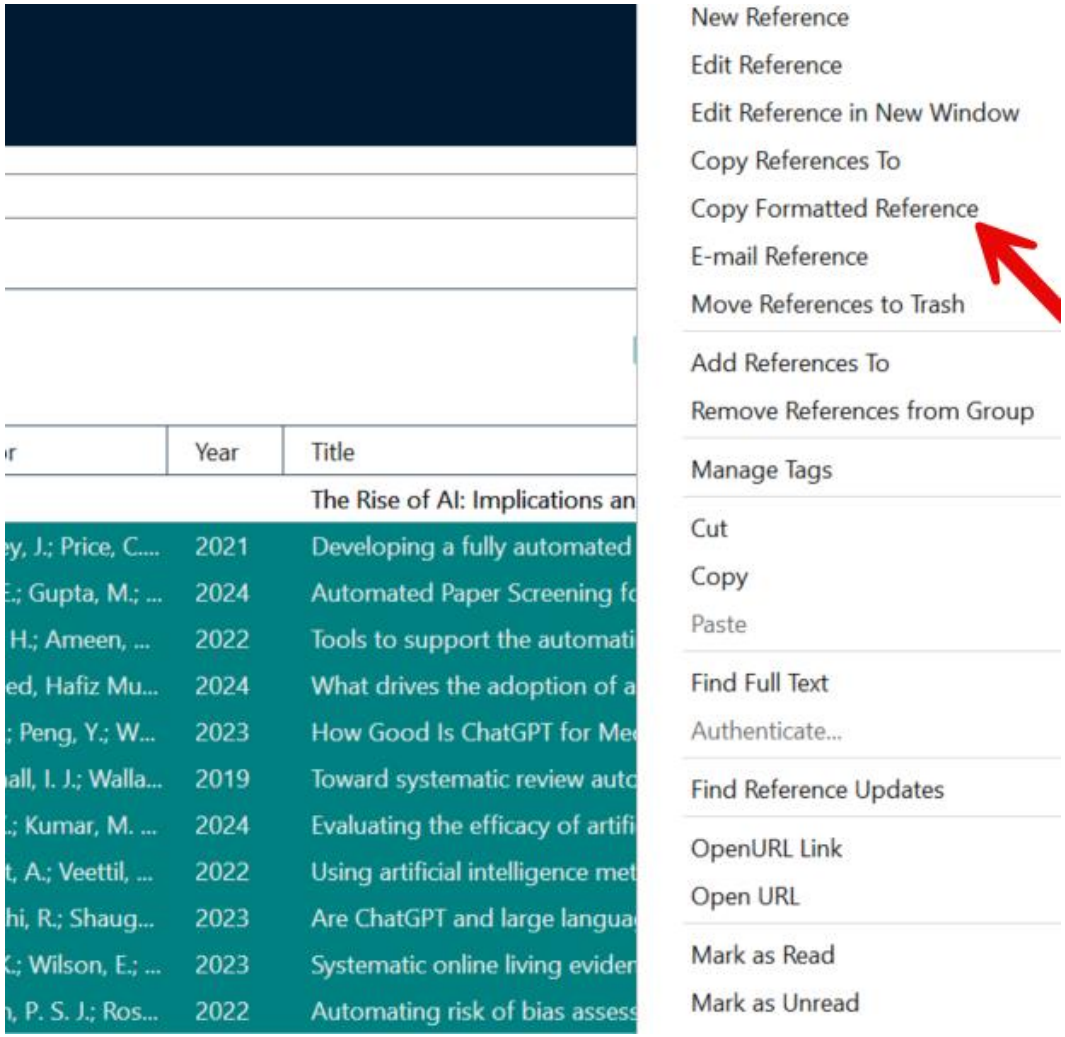




Citation Styles & Bibliography

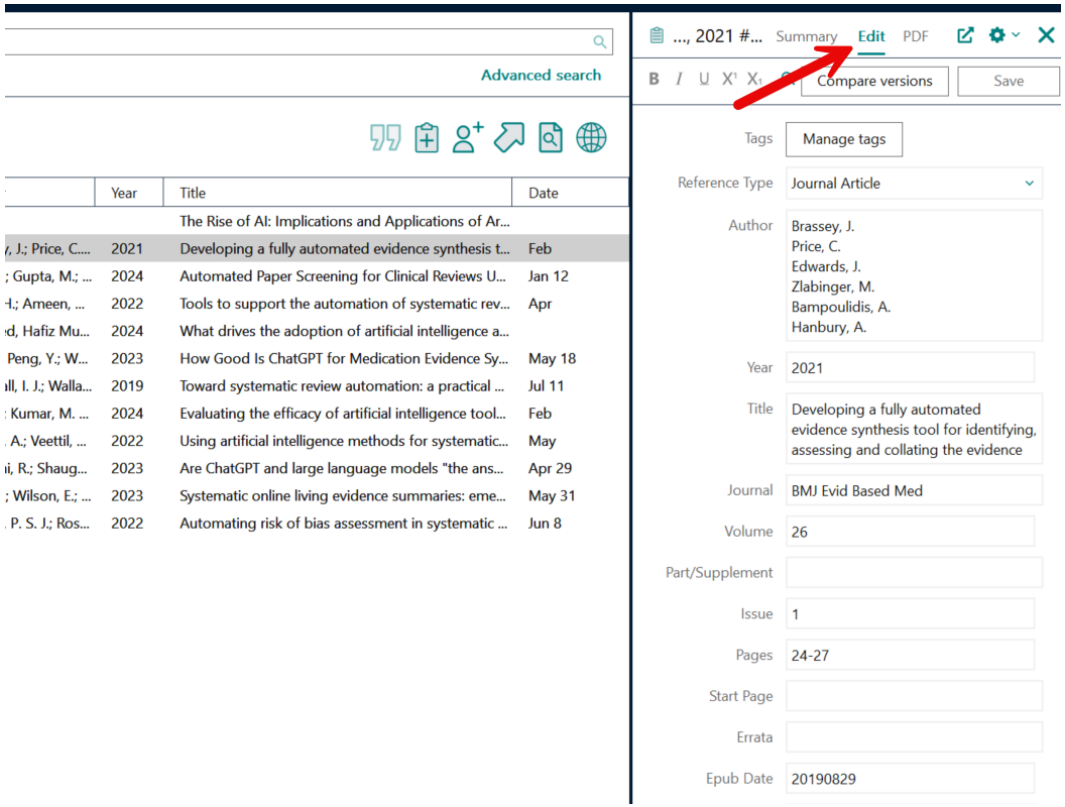
Create a Bibliography

1. Select your style preference (ex: APA 7th) on the side panel
2. CTRL + A > Right Click > **Copy Formatted Reference**
3. Paste in a Word document, PowerPoint slide, email, etc.



Edit Citations

In the side panel, click on edit and make changes. Don’t forget to save!

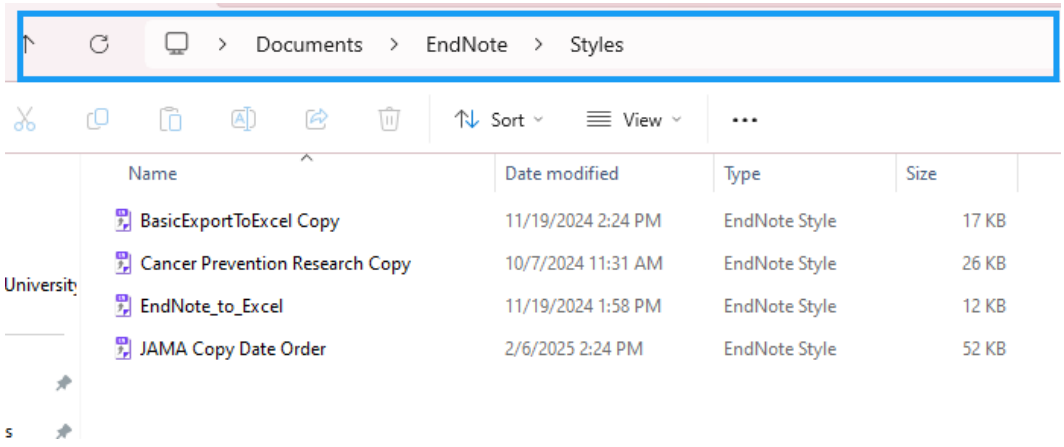


Edit Output Styles

Before you make any edits, check to see if a Journal has a citation style available to download on EndNote's website.

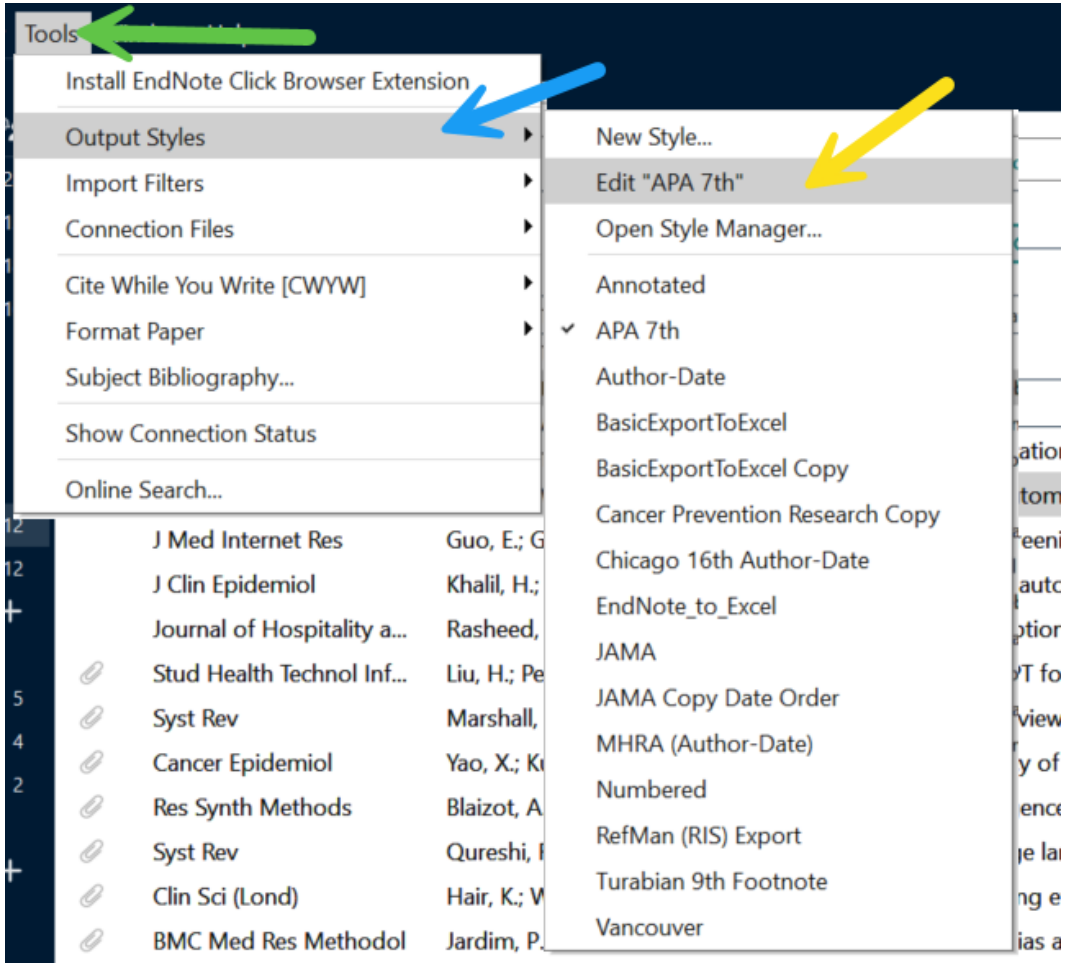
https://endnote.com/downloads/styles

Double click the file to open in EndNote and CTRL + S to save it (or copy to the **Styles** folder in the EndNote folder in your documents folder)



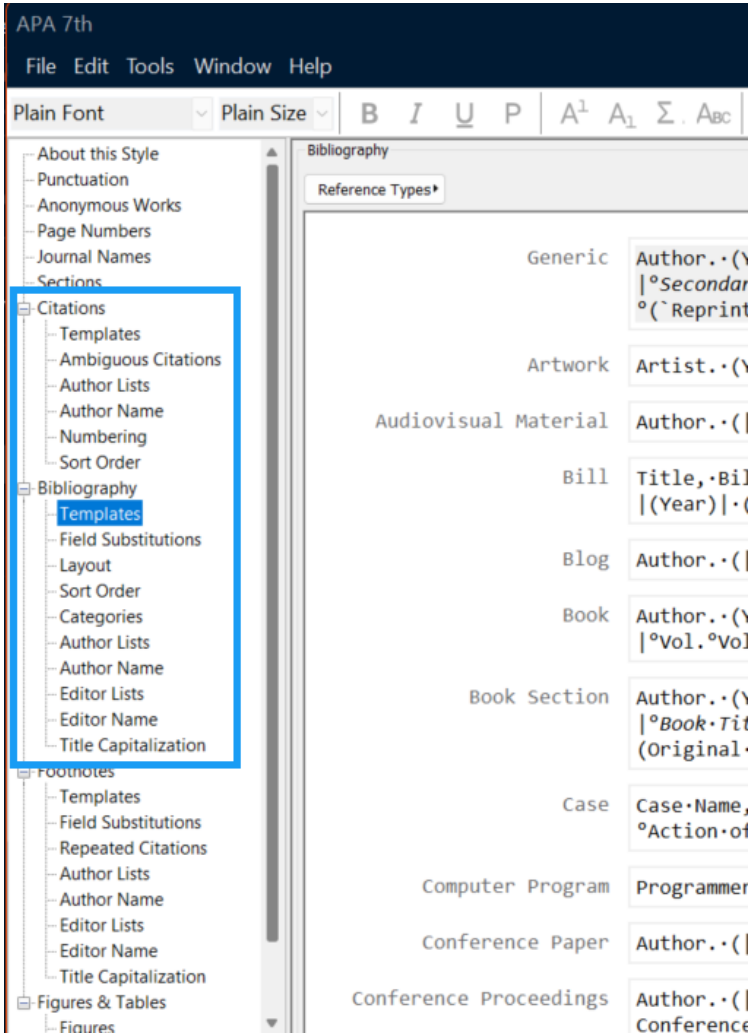
Edit Output Styles

In EndNote, click on **Tools** > **Output Styles** > Edit **“[citation style name]”**. Select **Open Style Manager** if you want to edit a different style.



Edit Output Styles

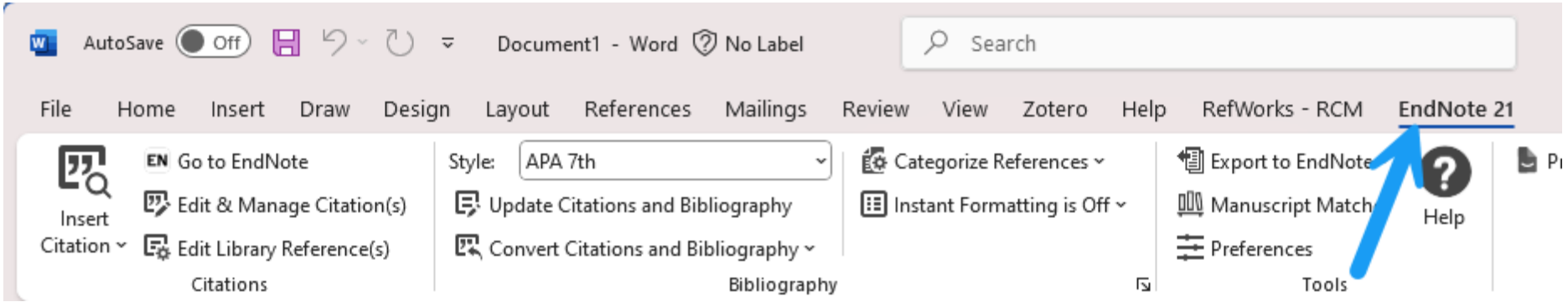
Citations and Bibliography will probably be the two places where you'll make most edits. When you save, EndNote will save a Copy of the style



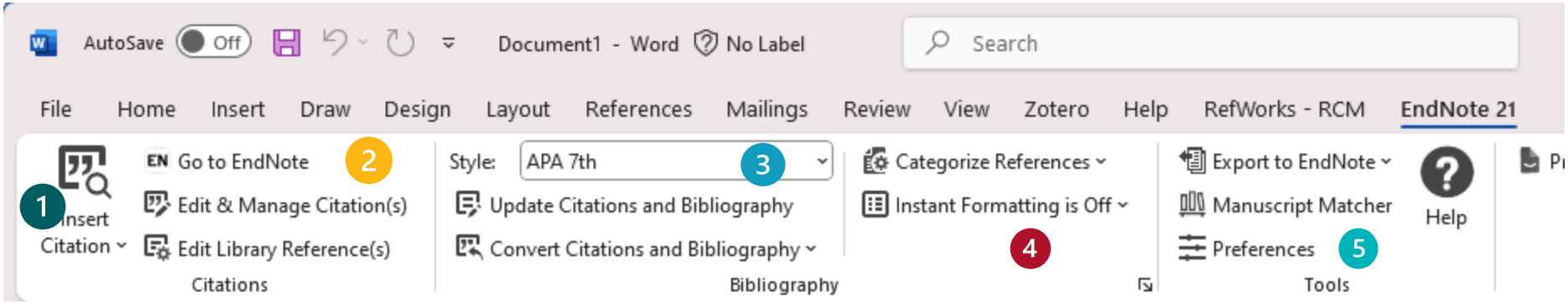
Cite While You Write

Getting Started

When downloading EndNote, the Cite While You Write (EndNote tab) will be added to your Microsoft Office applications



EndNote Tool Bar



1. Insert citations; highlighted in EndNote or search; Alt + 7

2. Edit/modify in-text citations

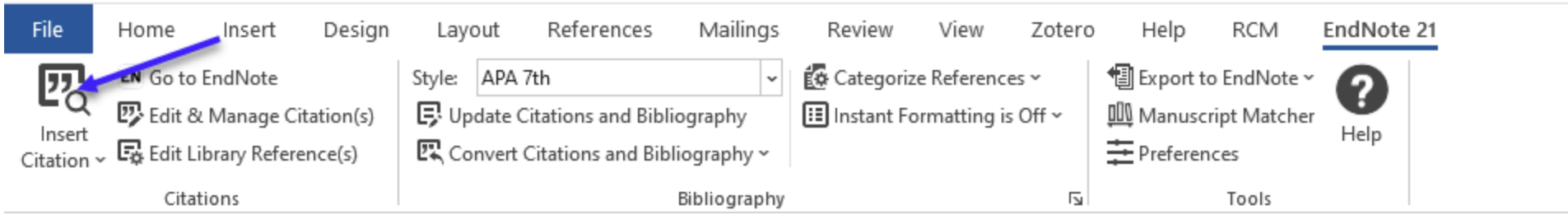
3. Update reference lists; shows any changes made to citations

4. Use EndNote code {author, date} or show full in text citation & reference list. Toggle using instant formatting

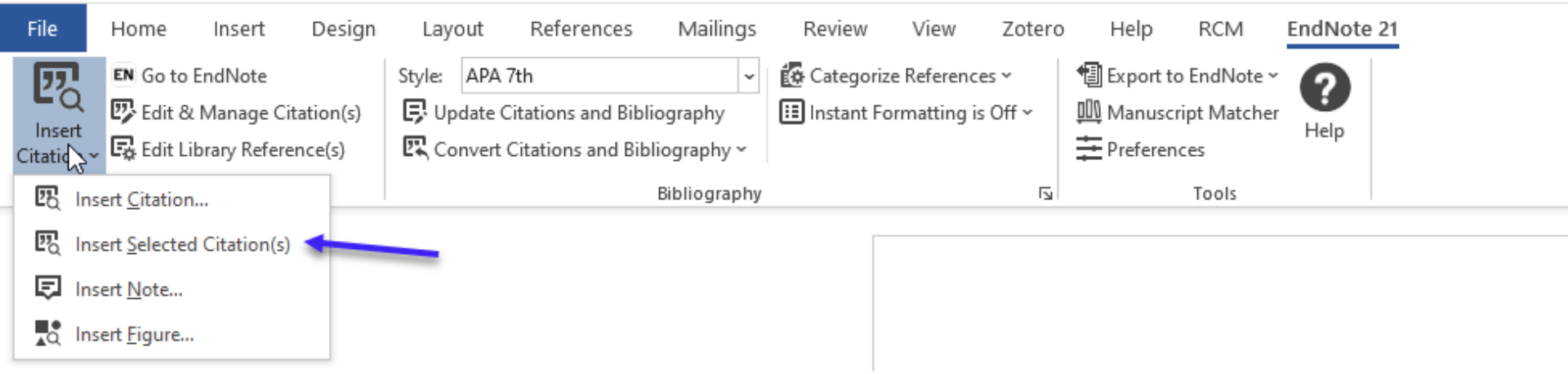
5. Preferences; account; using EndNote Online

Wikipedia in the Classroom: A Literature Review

Starting in 2001, Wikipedia developed into an online information source and is a multilingual, online encyclopedia maintained by volunteers (also known as Wikipedians) [Wikipedia, 2023]. This online tool does not present original research but knowledge that has already been established [Wikipedia, 2023]. While this resource holds information on various topics (media, health, news events, historical figures, etc.), its use in education is highly debated. Wikipedia is often presumed to be unreliable because of its open-source collaborative editing structure [Guven, 2020].

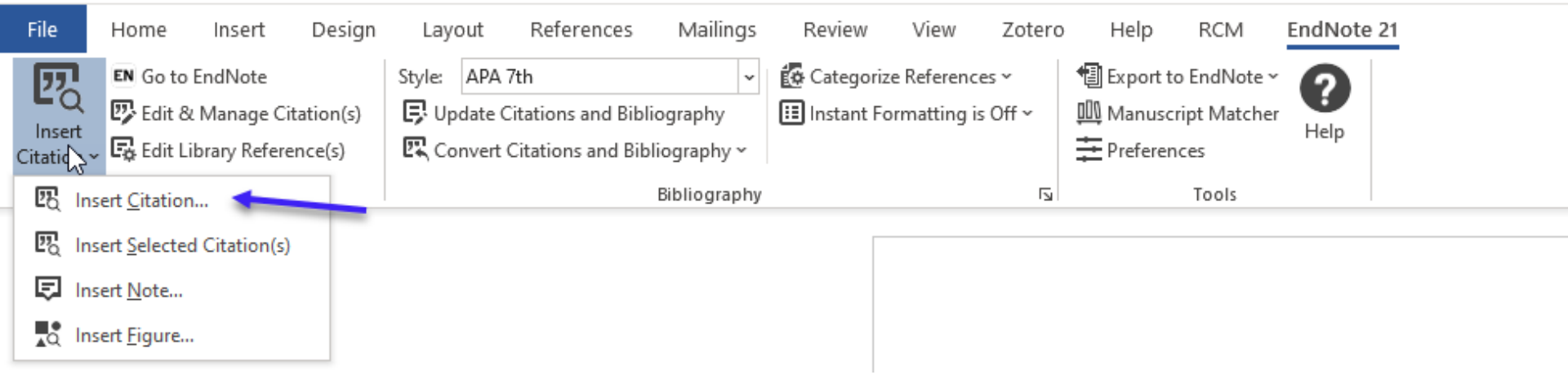


1. Place your cursor where you want the in-text citation to appear in your Word document
2. Click the **Insert Citation** button



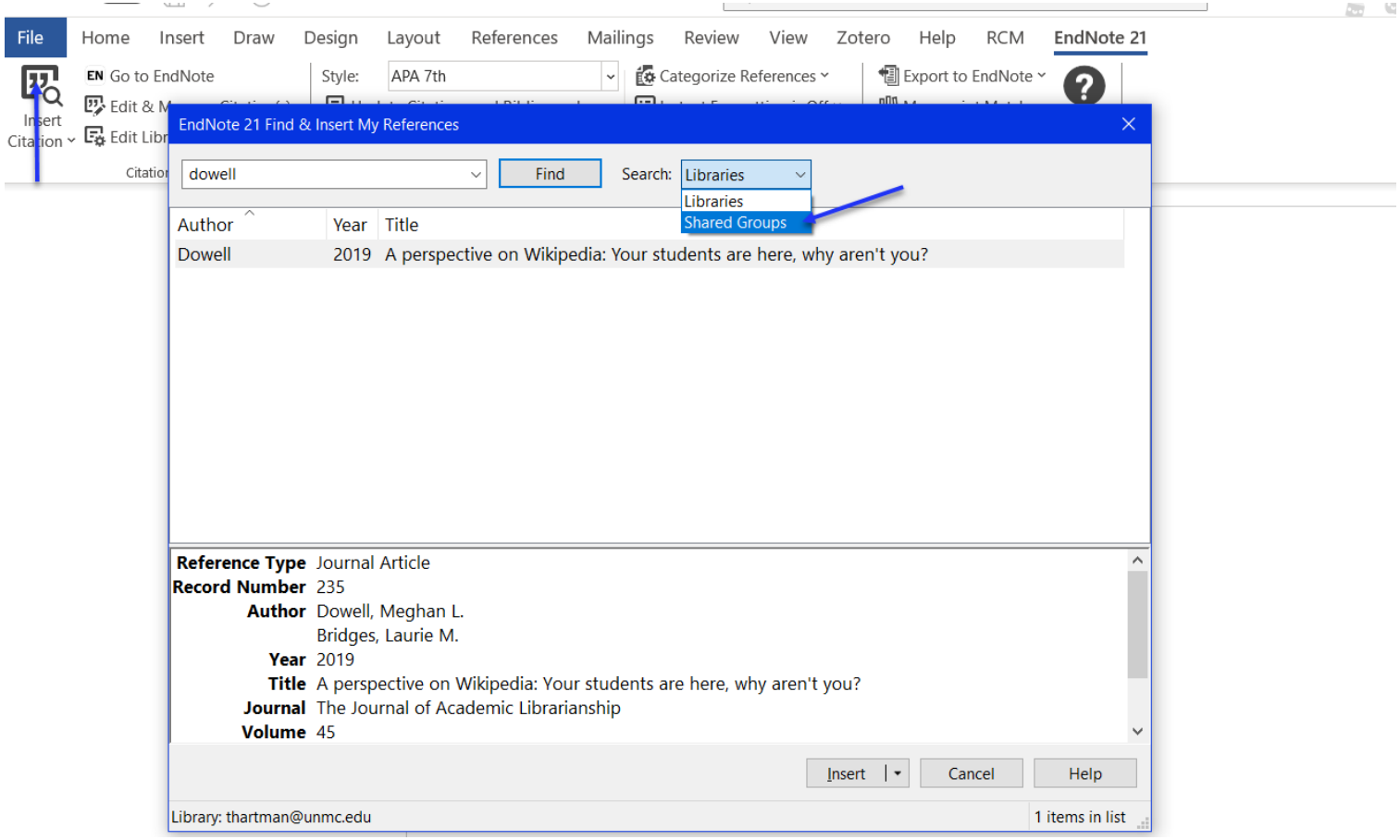
Option 1: Insert selected Citation(s)

- Place your cursor where you want to cite in your Word document
- Select the citation in your EndNote library AND then click insert selected citations (or the quotation marks in your EndNote library)



Option 2: Insert Citation

- Place your cursor where you want the intext citation to appear in your Word document
- Search for citations by author, keyword, journal, etc.

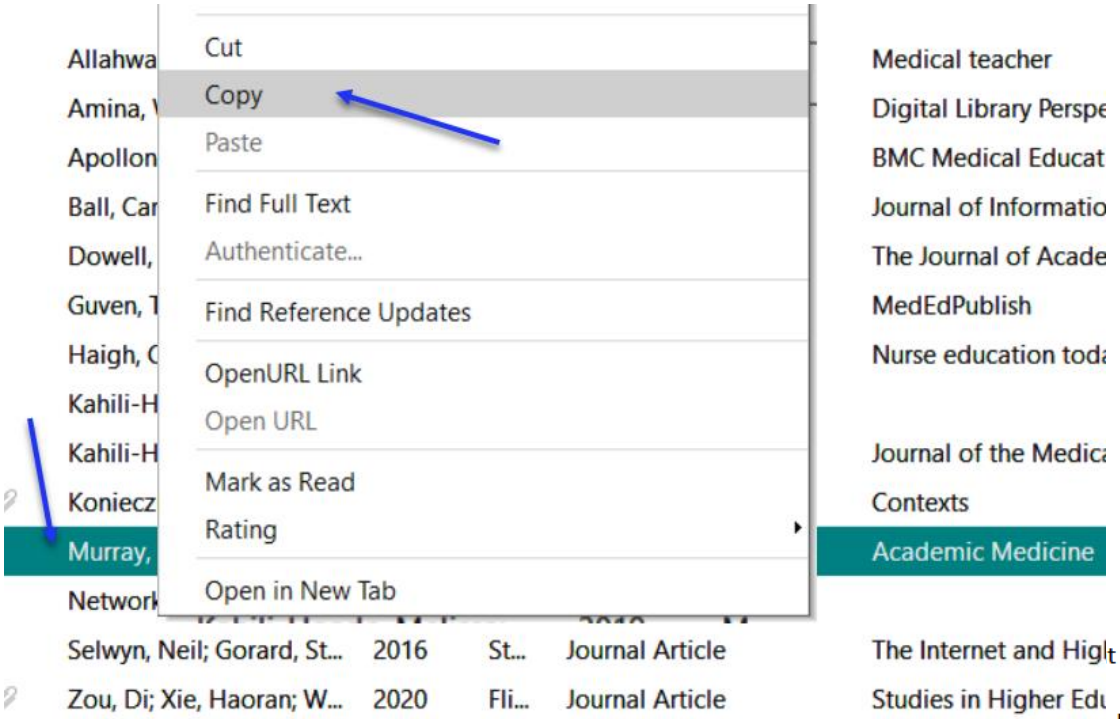


If needing to cite from a shared group, use the drop-down option

Starting in 2001, Wikipedia developed into an online information source and is a multilingual, online encyclopedia maintained by volunteers (e.g., Wikipedians) {, 2023 #244} [Wikipedia, 2023]. This online tool does not present original research but knowledge that has already been established [Wikipedia, 2023]. While this resource holds information on various topics (media, health, news events, historical figures, etc.), its use in education is highly debated. Wikipedia is often presumed to be unreliable because of its open-source collaborative editing structure [Guven, 2020].

Intext citations with EndNote code/short-hand

{author last name, date}



1. Right click a citation in your EndNote Library and select **Copy**

2. Paste where you want the citation to appear.

t investigated using Wikipedia in the classroom in academics

cle investigated using Wikipedia as a platform to teach evidence-based medicine to first-year medical students. For one semester, instructors used Wikipedia as a knowledge tool for students to review entries, search for resources, identify knowledge gaps in the article, and make any necessary edits {Murray, 2020 #231} [Murray, 2020]. At the University of Hawaii at Manoa, health sciences librarians used Wikipedia as a resource to promote health literacy by having medical students edit specific health topics' Wikipedia articles [Kahili-Heede, 2022]. In this article, the authors have found that allowing students to get into these entries and make any necessary changes improved the quality of the information already online and being viewed and the student's own perceived health literacy [Kahili-Heede, 2022].

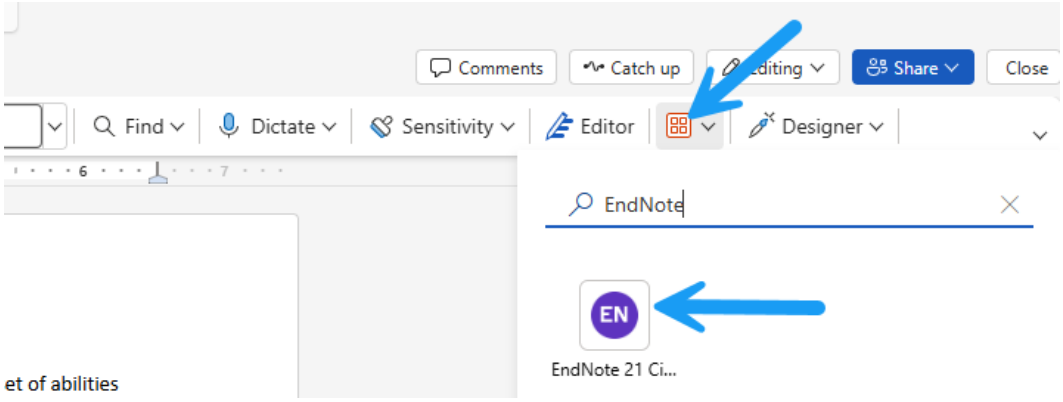
{ } and Formulas

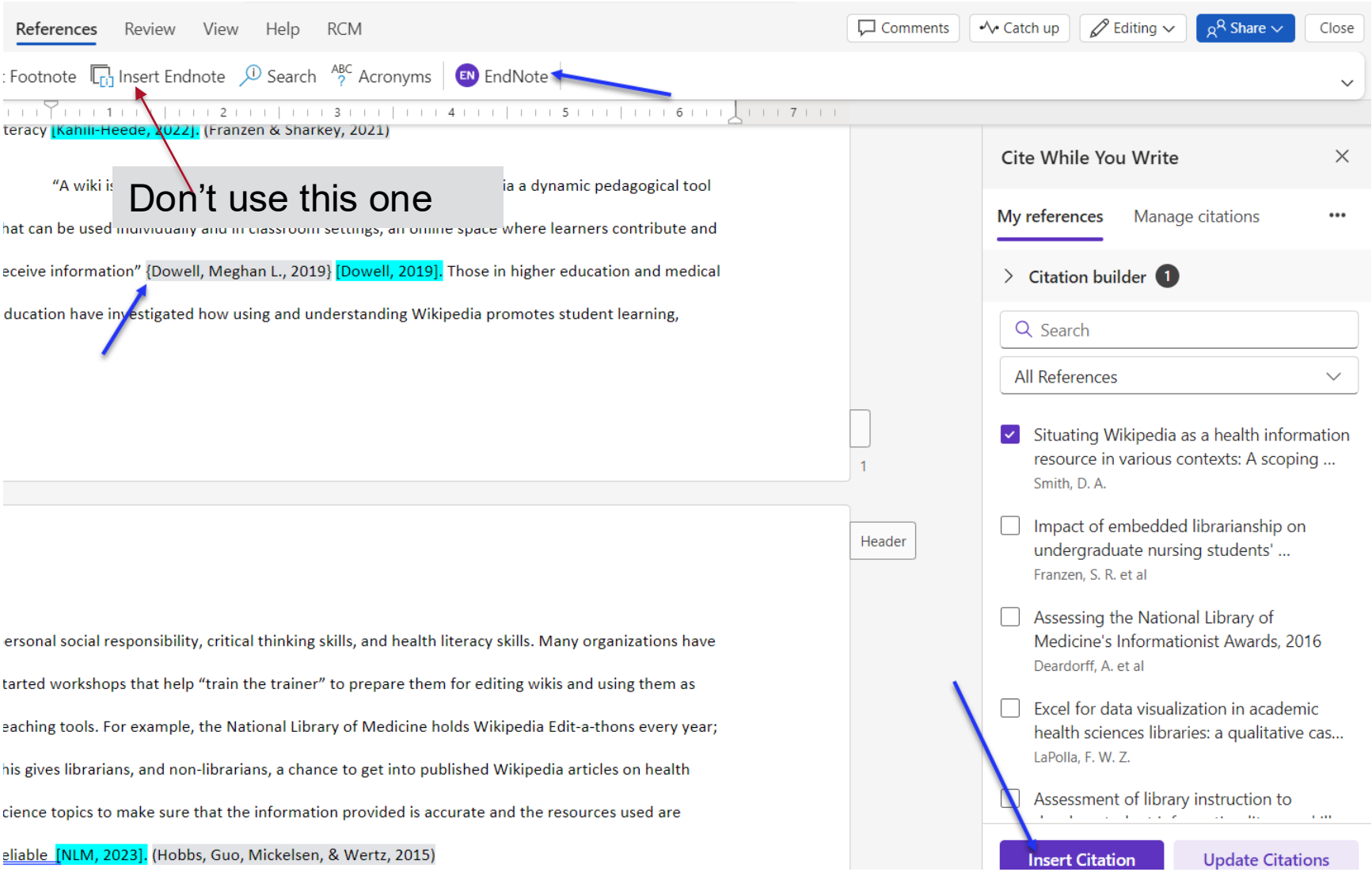
If you are using formulas in your manuscript that contains curly brackets, EndNote might read this as a citation.

Here's a quick fix: https://support.clarivate.com/Endnote/s/article/EndNote-Trouble-with-equations?language=en_US

Install EndNote to Office 365 (online)

1. Click on Add-ins icon on the Home tab
2. Search for EndNote and install
3. Log in with your EndNote Online account (must have EndNote 21)

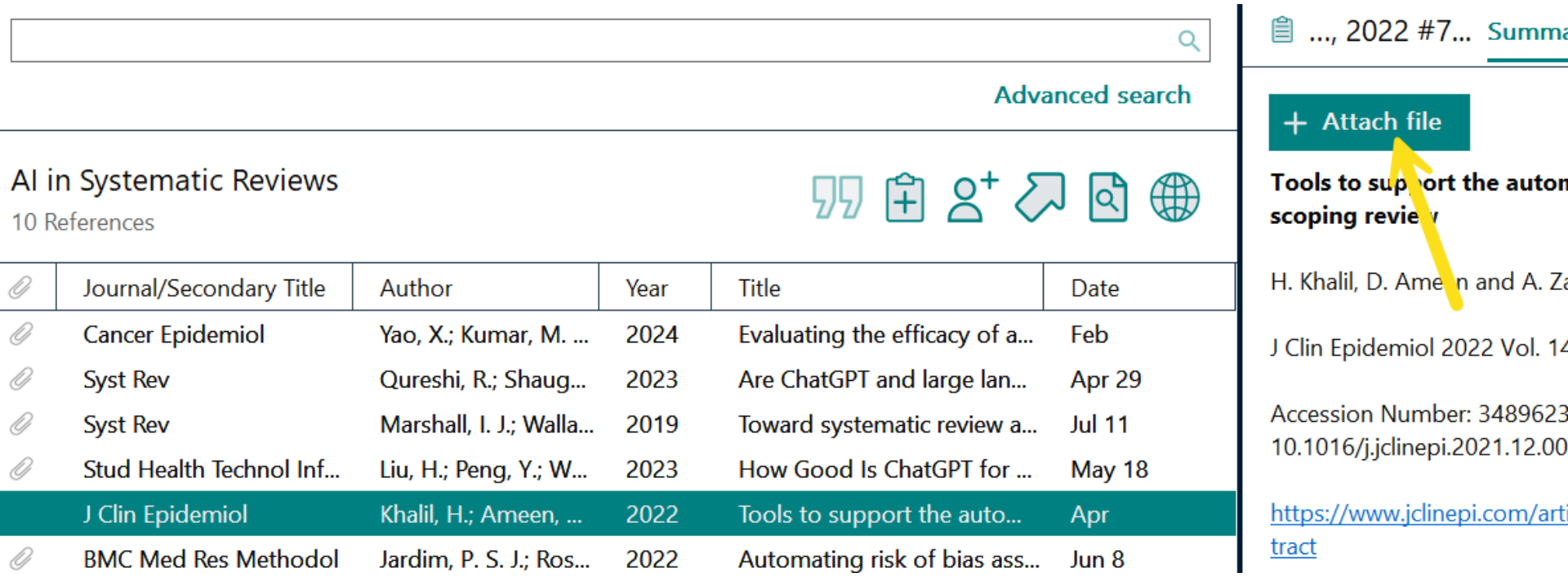




EndNote in Teams/Office 365 – make sure to use the EndNote with the purple icon!

Misc.

Attach PDFs



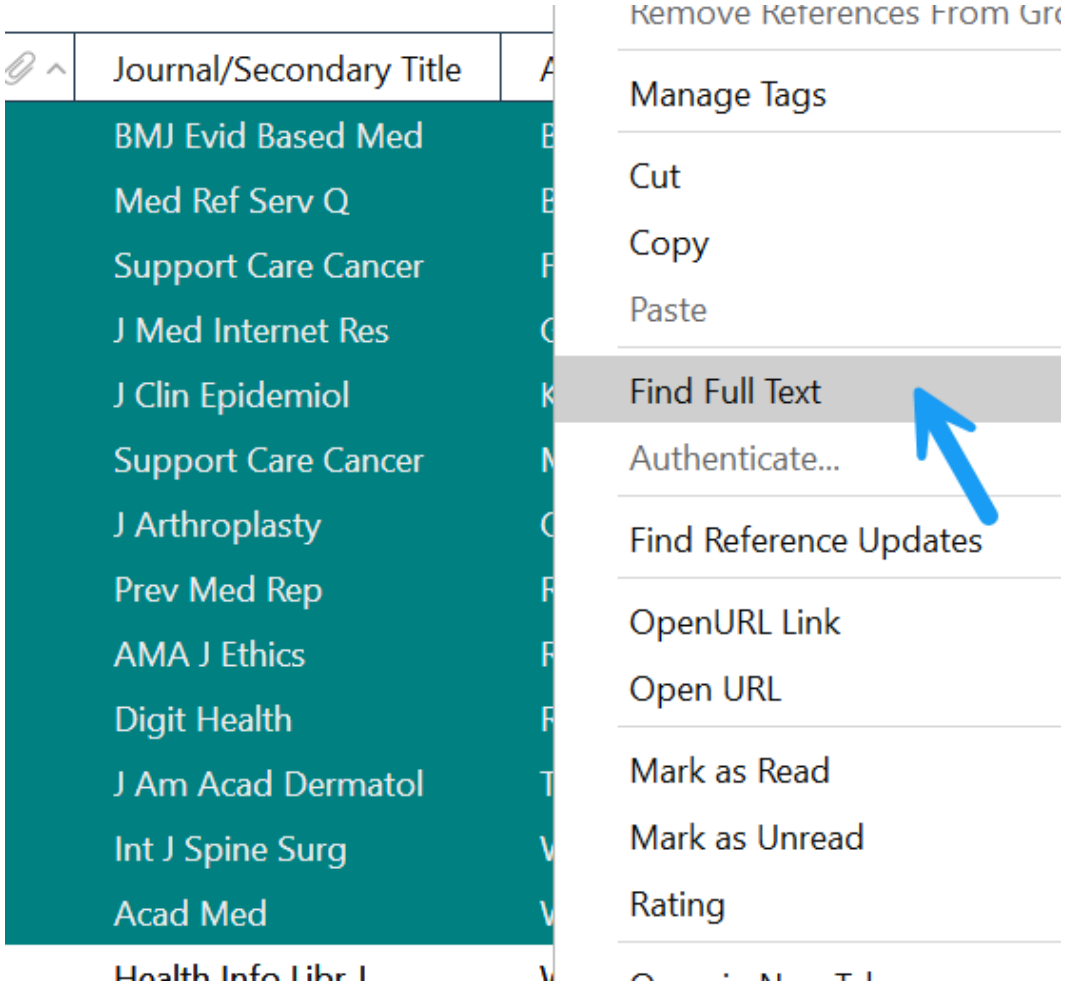
Download PDFs and attach them to citation records. Records with a paperclip have attachments.

Annotate PDFs

Find Full Text

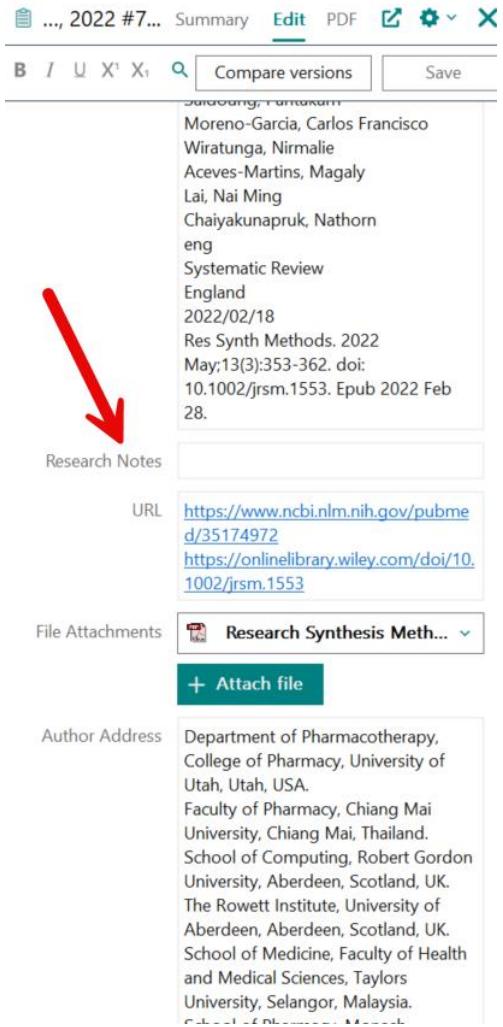
Using the Find Full Text feature, this will find *most* **open access** articles.

1. Highlight the articles you want to find
2. Right click > find full text



Research Notes

In the side panel, research notes are available near the bottom



Resources

- EndNote Research Guide: https://unmc.libguides.com/endnote
- EndNote Knowledge Base: https://support.clarivate.com/Endnote/s/article/EndNote-FAQs?language=en_US
- EndNote tech support:
  - Ph: 1-855-258-5858; Option 2 for EndNote
  - EndNote.support@clarivate.com

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University of Nebraska Medical Center℠

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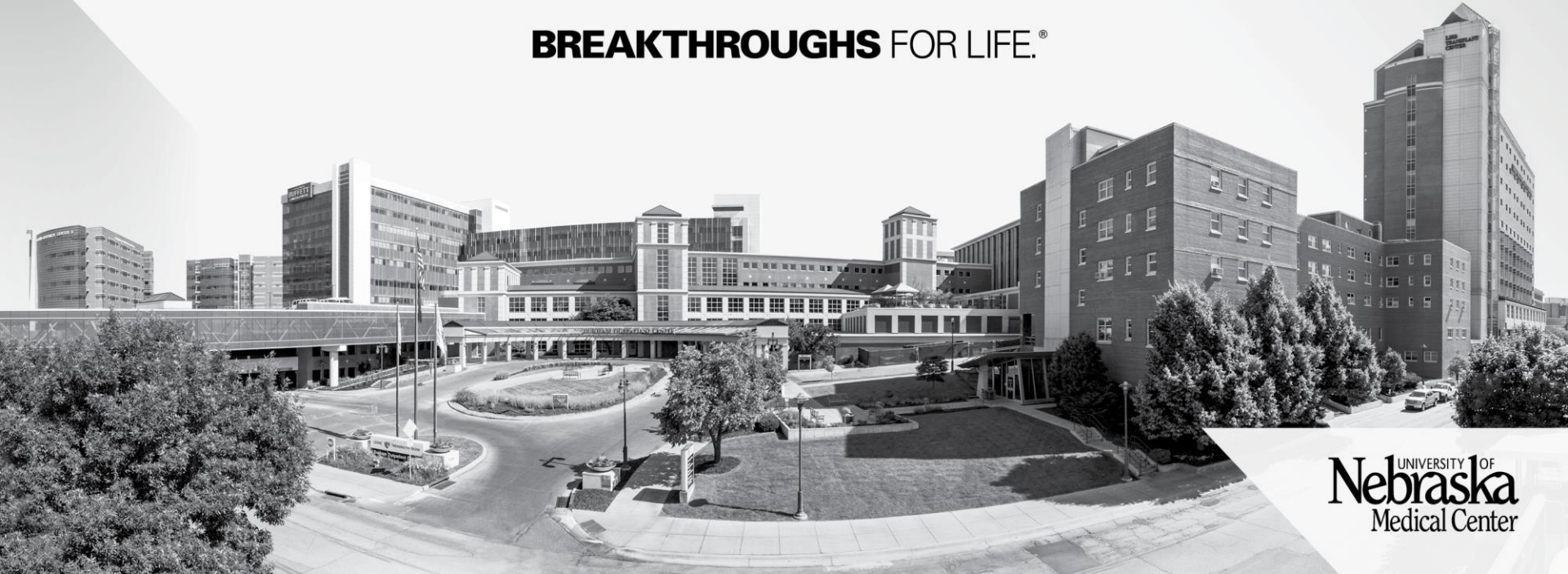

University of Nebraska Medical Center