

EndNote Initiation

Managing and editing bibliographic references with EndNote X7

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Introduction

Managing references

- Reference management software allows you to **manage your own references** in a dedicated **database**.

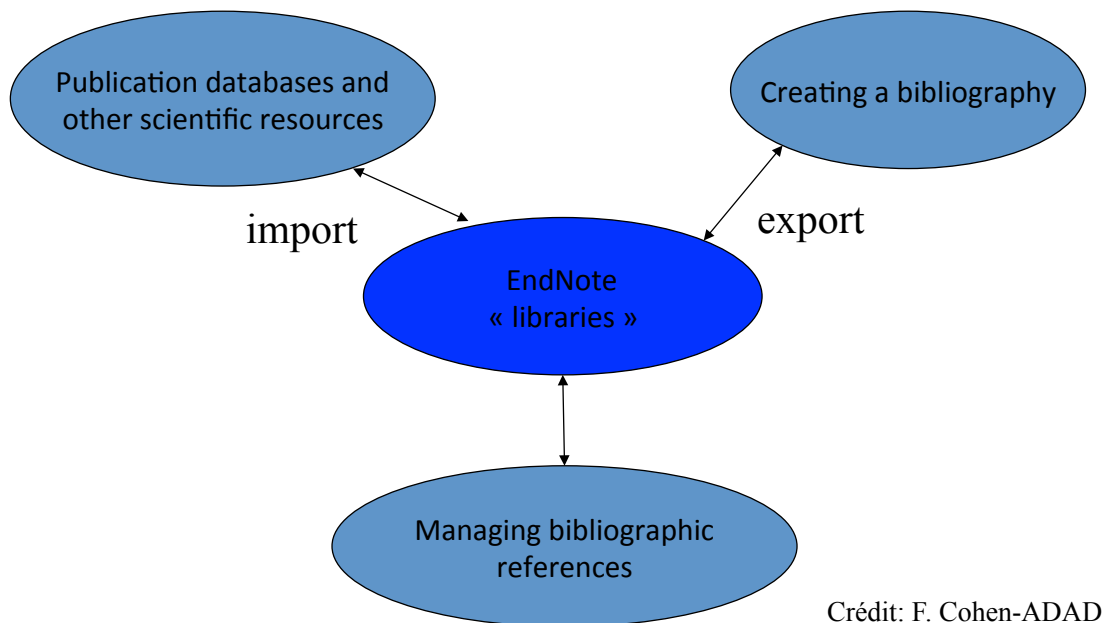
Ex: Endnote, Zotero, Mendeley, Bibtex,...

- **Storage can be local or on line**

Ex: EndNote X7 vs EndNote Web (= EndNote Basic)

Synchronisation available since ENX6

Main functionalities



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Introduction

Collecting references

- While you are searching references in scientific databases...
... reference managers allow you to **retrieve them automatically** from other sources of scientific publications.

→ **Importing the references is easy**

Introduction

Creating bibliographies

- They also makes it possible to **create a bibliography** in accordance with the **bibliographic styles** required by many academic journals

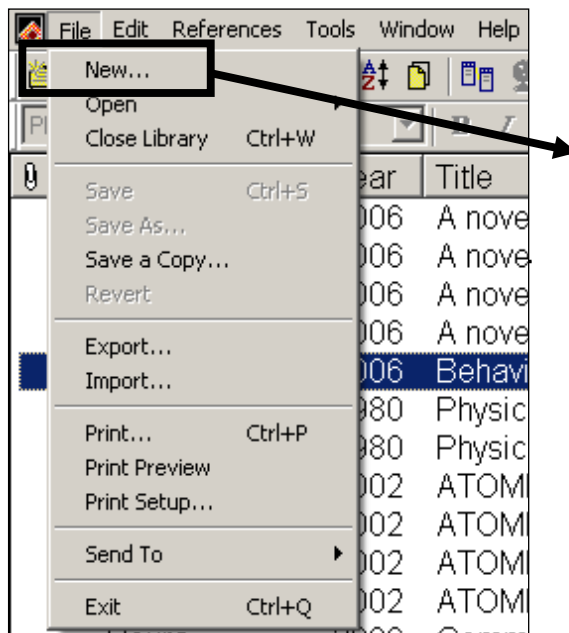
→ **Writing and editing an article is facilitated**

Introduction

About Endnote

- Endnote Desktop, version X7 (X8 now available)
- Compatible with *MacIntosh, Windows, Open Office*
- An Endnote Library is a database entailing a list of references
 - file format .enl
- It is possible to manage several LIBRARIES

Introduction: The library



New: Creation of a new library

Open (Close):
Opening (closing) an existing library

Outline

1. Collecting references
2. Managing and organizing references
3. Exporting/editing citations and bibliographies

1. Collecting references

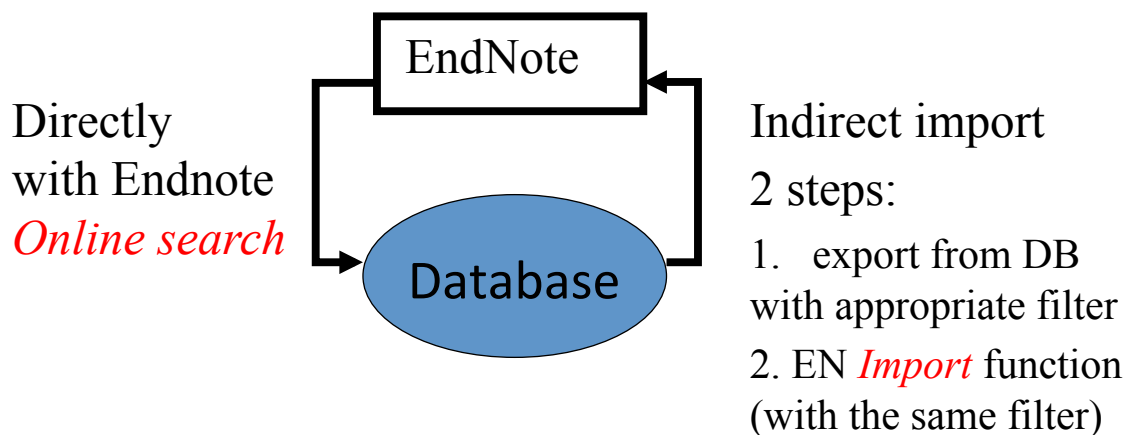
It is possible to retrieve automatically bibliographic records from different types of source...

- bibliographic databases
- e-journal platforms
- library catalogs

...and to import them into EndNote.

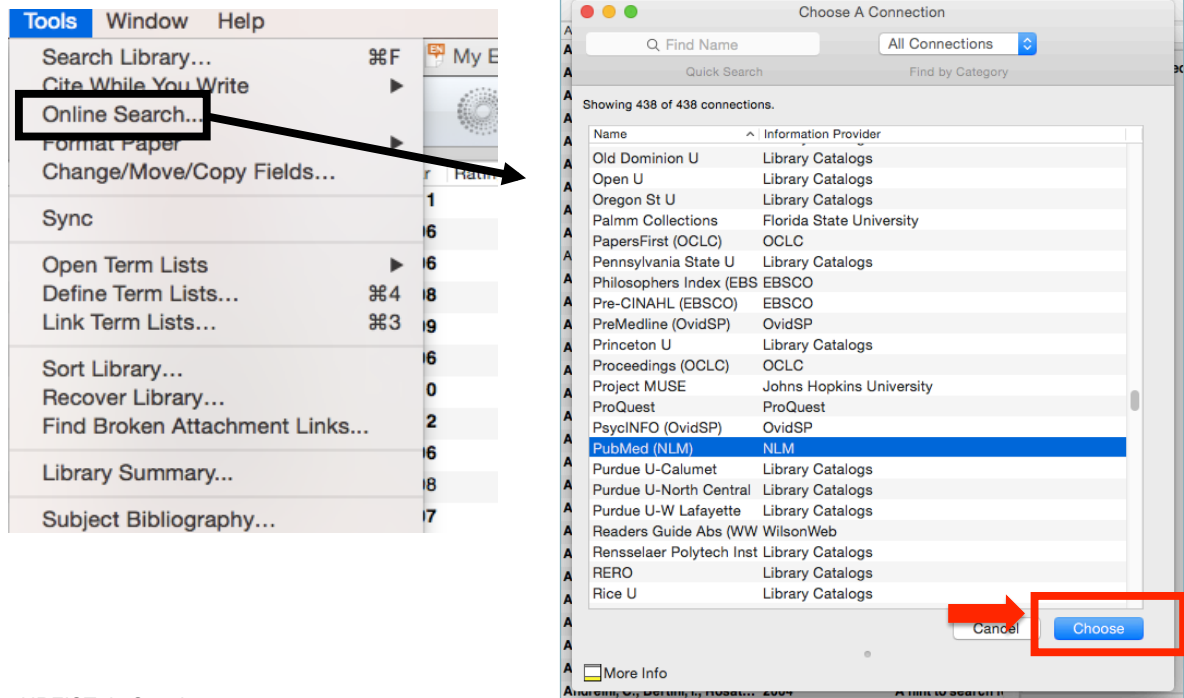
Import principles

- 2 types of imports: direct vs indirect



Online search (direct import)

Tools → Online Search → window Choose a connection

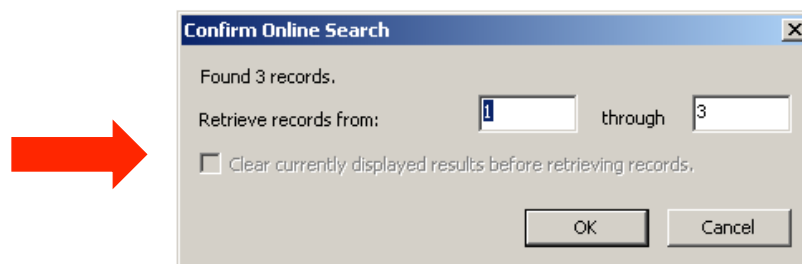
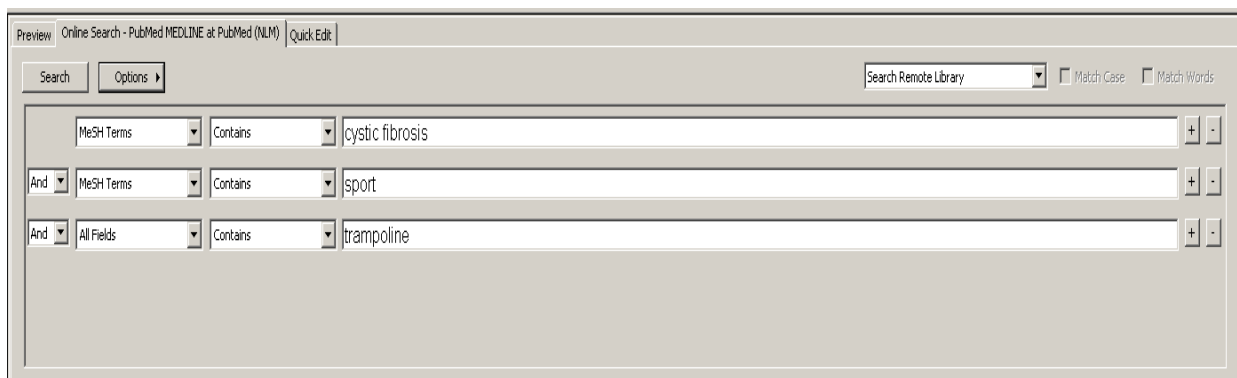


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Online search

Search Remote library → write a query



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Online search

fig.	0	Author ▲	Year	Title	Journal	Ref Type	URL
		Currant	2008	Trapolining as an adjunct to regular...	Ir Med J	Journal Arti...	http://www.ncbi.nlm...
		Barak	2005	Trampoline use as physiotherapy for ...	Pediatr Pul...	Journal Arti...	http://www.ncbi.nlm...
		Stanghelle	1988	Effect of daily short bouts of trampoli...	Int J Sports ...	Journal Arti...	http://www.ncbi.nlm...

EN imports automatically the references

NB: They are temporarily stored in the last import panel

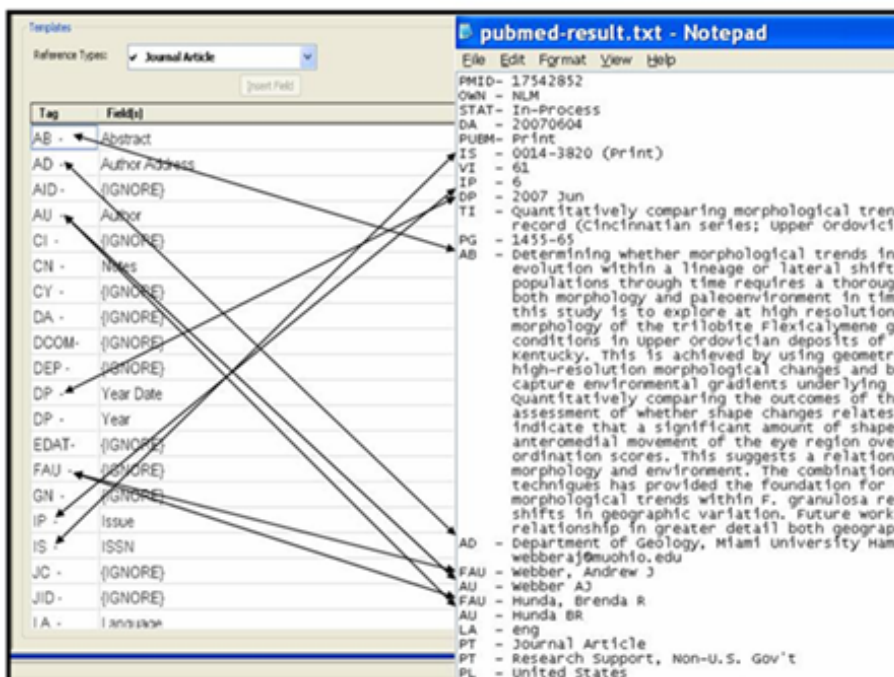
Indirect import: export/import

- Indirect import mode corresponds to the common way of searching references
- $\leftrightarrow$ proceeding in two steps:
 1. Search references in your specialised database(s) as usual and export them into your PC hard disk.
Select the appropriate ref export format e.g. a format for EndNote (if available), RIS, or other...
 2. Open EN and import the file (menu **File** $\rightarrow$ **Import**)
Use the corresponding import filter (e.g. a format .enl, .ris, etc.)

Indirect import: filters

- Indirect import requires filters
- Filters are specific and vary according to the source
- A filter specifies how the data of the reference file has to be translated into EN "language"
- It matches the data contained in the source with the corresponding EN fields

Indirect import: filters



Example:
matching
the fields
in the case
of PubMed

Indirect import: RIS format

- There are more than 700 filters for EndNote... (as many as information providers and platforms!)

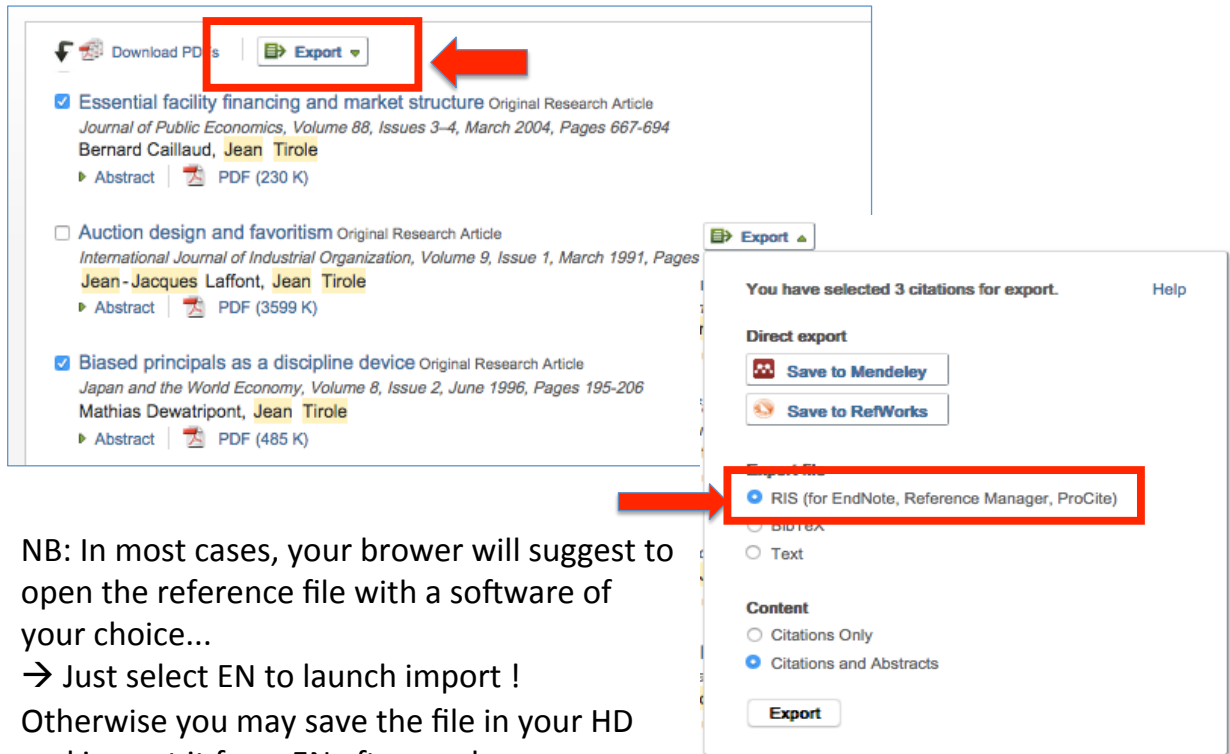
Fortunately...

- RIS tends to become a standard format for bibliographic references
- It is compatible with most bibliographic databases, e-journal platforms and reference managers, including Endnote.

Indirect import: Importing references from a platform

- Bibliographic databases (WoS, DB in EBSCO host, Sciefinder, Pubmed Medline, etc.)
- E-journals (ScienceDirect, SpringerLink, etc.)
- library catalogs (ABES/SUDOC, etc)

Importing references from ScienceDirect



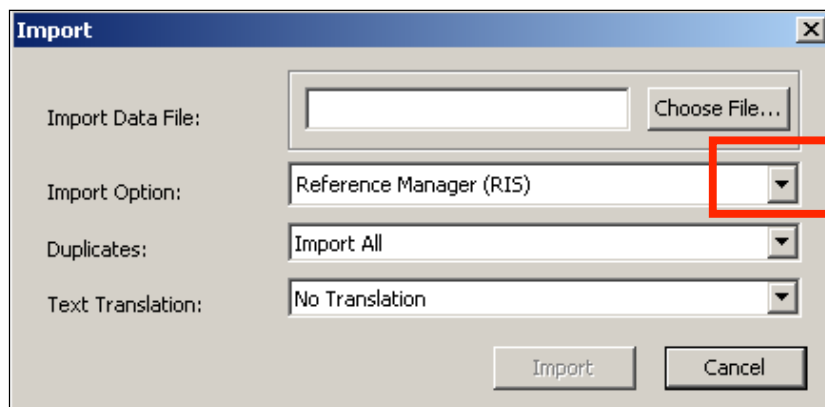
The screenshot shows the ScienceDirect website interface. At the top, there are buttons for 'Download PDFs' and 'Export'. A red box highlights the 'Export' button, with a red arrow pointing to it. Below the buttons, three research articles are listed, each with a checkbox and a PDF icon. The first article is 'Essential facility financing and market structure' by Bernard Caillaud and Jean Tirole. The second is 'Auction design and favoritism' by Jean-Jacques Laffont and Jean Tirole. The third is 'Biased principals as a discipline device' by Mathias Dewatripont and Jean Tirole. To the right, an 'Export' dialog box is open. It shows 'You have selected 3 citations for export.' Under 'Direct export', there are buttons for 'Save to Mendeley' and 'Save to RefWorks'. Under 'Export file', there are radio buttons for 'RIS (for EndNote, Reference Manager, ProCite)', 'Bibtex', and 'Text'. The 'RIS' option is selected and highlighted with a red box. Under 'Content', there are radio buttons for 'Citations Only' and 'Citations and Abstracts'. The 'Citations and Abstracts' option is selected. An 'Export' button is at the bottom of the dialog.

NB: In most cases, your browser will suggest to open the reference file with a software of your choice...
→ Just select EN to launch import !
Otherwise you may save the file in your HD and import it from EN afterwards

Importing a reference file

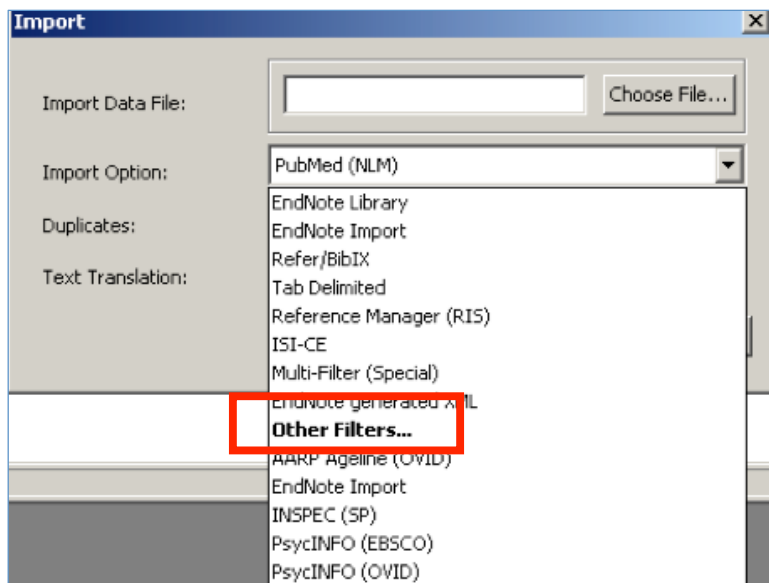
In order to import a reference file (from a platform or from another ref manager) after saving the file in your hard disk
→ open EN to select the appropriate import filter...

→ Chose *Import* in the *File* menu, then select the filter



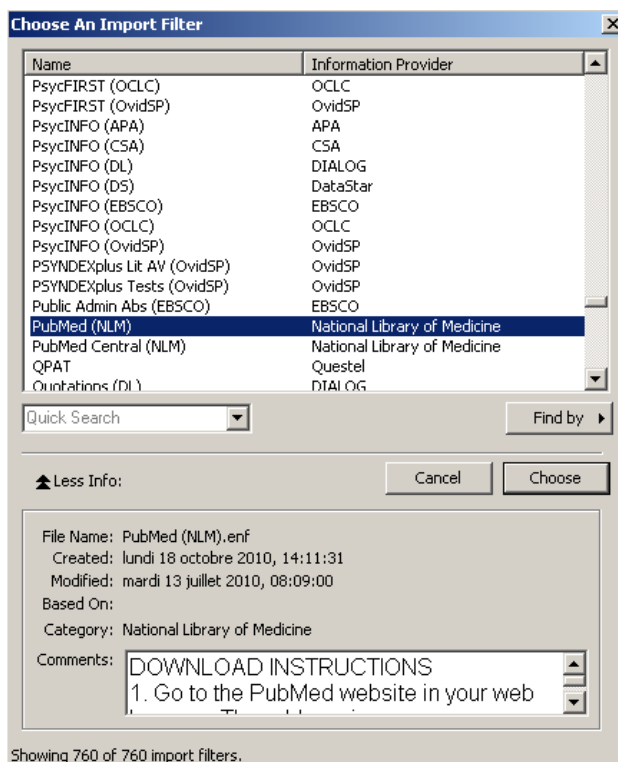
Importing a reference file

Example of PubMed



If PubMed is not in the list, chose "other filters"

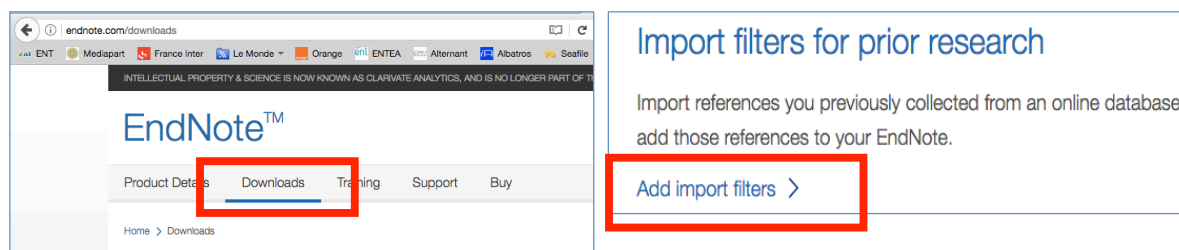
Indirect import: importing...



A window opens.
Select the filter
Pubmed (NLM)

Indirect import: importing...

- If the resource from which you intend to import references does not appear in the previous EN window (ie list of filters)...
- ... It is possible to download additional filters at <http://endnote.com>
- Click on "**Download**", then "**add import filters**"



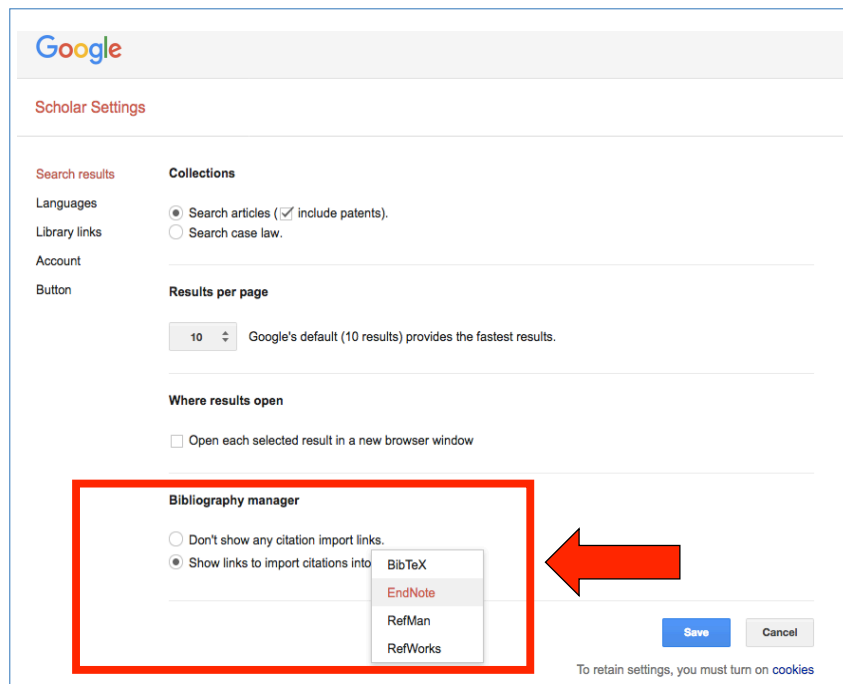
Indirect import: help

In case export in RIS or EN is not available in the source (as is the case of Pubmed Medline)...

... Use EN helpo find the appropriate filter: *Help* → *Direct export format* → *Output format with corresponding import options*

- Welcome - Introduction - The EndNote Library - EndNote References - Searching and Sorting in EndNote - Groups - Output Styles - Filters - Connection Files - Preferences - Reference Types - Term Lists - EndNote Online - Searching Online Databases - Importing Reference Data - Direct Export Formats and Import Formats - About Direct Export and Import Formats - Direct Export Providers - Direct Export of Records from PubMed - APIs and Plug-ins - Output Formats with Corresponding Import Options - Microsoft Word / Cite While You Write - Apple iWork Pages '09 / Cite While You Write - RTF Files / Scanning and Formatting - Independent Bibliographies - Subject Bibliographies and Subject Lists	Knowledge Finder	1. Select the documents to be saved, then click View-Export-Email Selected. 2. Export selected references in PC EndNote format to initiate direct export. You may have to save the file to your desktop, then double-click it to initiate the direct export feature. You may also e-mail records in the MEDLARS or MEDLARS w/ABSTRACTS format using this filter to import the data.	Various filters available at our EndNote online site.
	NERAC	Save your file as plain text (*.txt).	NERAC
	PsycINFO	http://www.apa.org After marking the records you wish to download, select Full PsycINFO Record, and then click the Display Marked Records button. Select the text, then copy and paste it into a text editor, saving the file it as plain text (*).	Use the PsycINFO (APA) filter.
	PubMed	For detailed instructions on how to search the PubMed database, see Importing References from PubMed in EndNote Help. You can also get detailed instructions from our EndNote Support site at http://www.endnote.com/support/faqs/import/faq1.asp You can check current download instructions for NLM PubMed at any time at http://www.pubmed.gov .	PubMed (NLM) filter

Importing references from Google Scholar



Google

Scholar Settings

Search results

Languages

Library links

Account

Button

Collections

☒ Search articles (✓ include patents).

☐ Search case law.

Results per page

10 Google's default (10 results) provides the fastest results.

Where results open

☐ Open each selected result in a new browser window

Bibliography manager

☐ Don't show any citation import links.

☒ Show links to import citations into

BibTeX

EndNote

RefMan

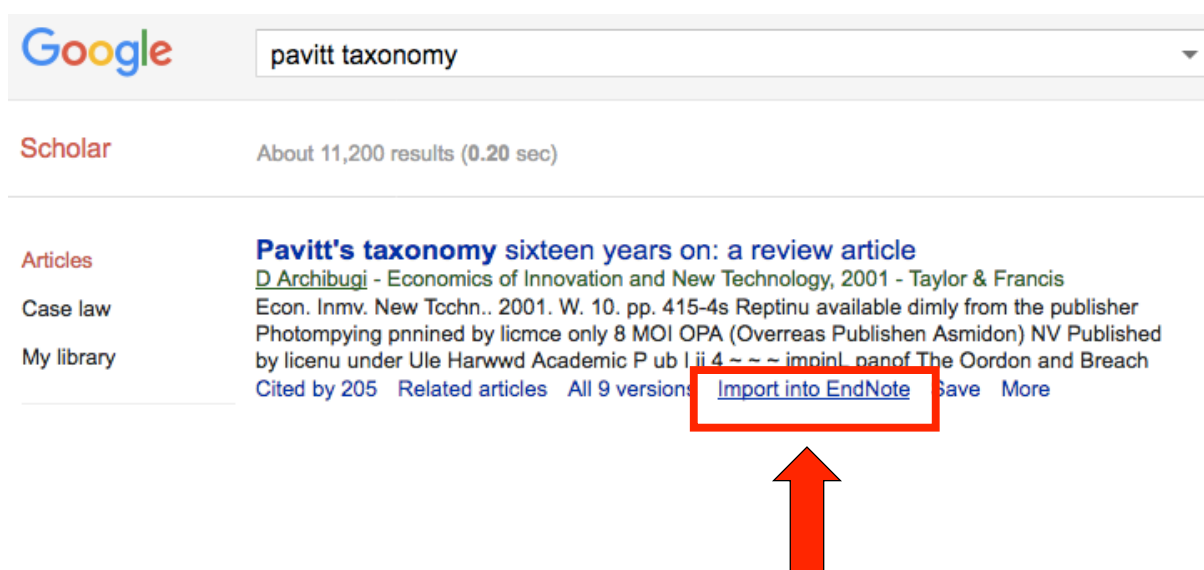
RefWorks

Save Cancel

To retain settings, you must turn on cookies

Just specify
import
parameters in
Google Scholar
setting

Importing references from Google Scholar



Google

pavitt taxonomy

Scholar

About 11,200 results (0.20 sec)

Articles

Case law

My library

Pavitt's taxonomy sixteen years on: a review article

D Archibugi - Economics of Innovation and New Technology, 2001 - Taylor & Francis

Econ. Inmv. New Tcchn.. 2001. W. 10. pp. 415-4s Reptinu available dimly from the publisher

Photompying pnnined by licmce only 8 MOI OPA (Overreas Publishen Asmidon) NV Published

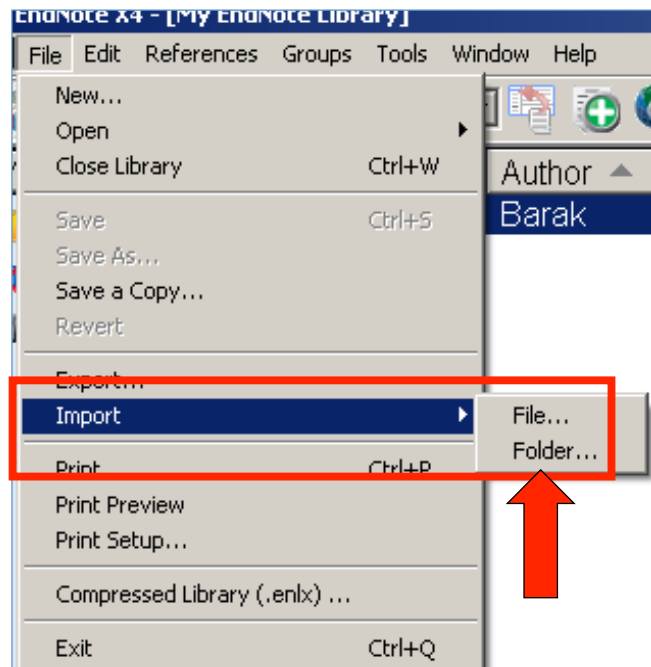
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Cited by 205 Related articles All 9 versions [Import into EndNote](#) Save More

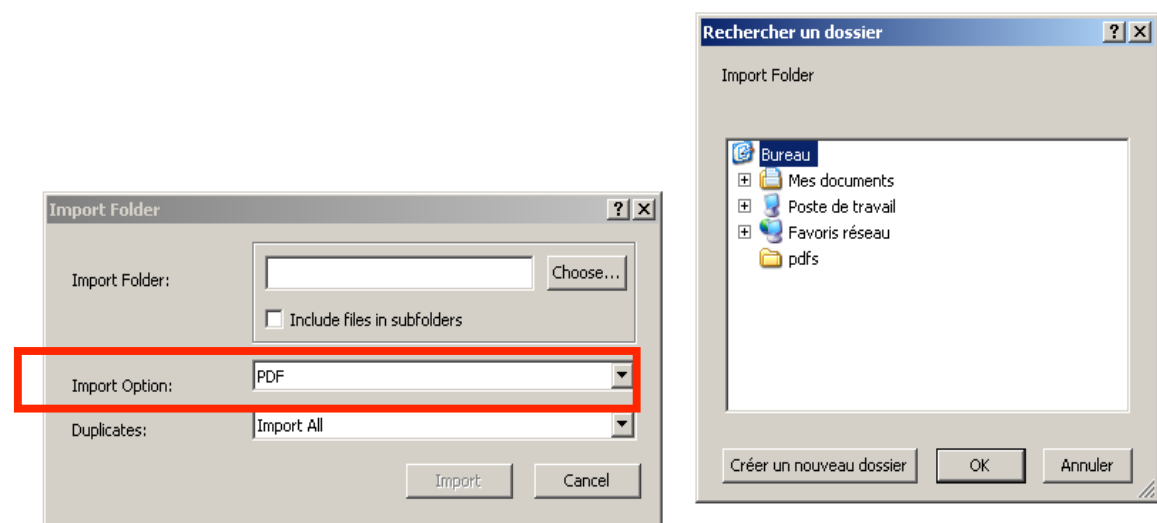
Importing metadata from pdf documents

If the metadata of pdf are properly filled in, it is possible to import them in EN bibliographic records/

(Also possible for a folder of pdf files)



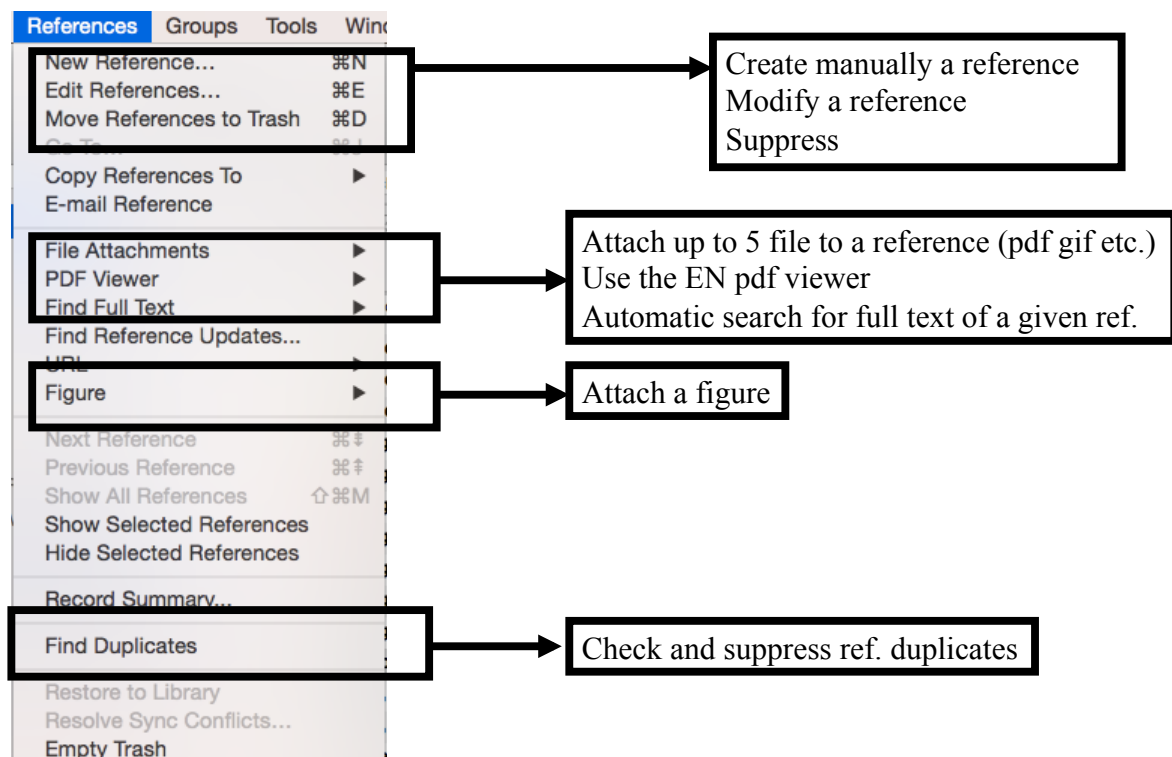
Importing metadata from pdf documents



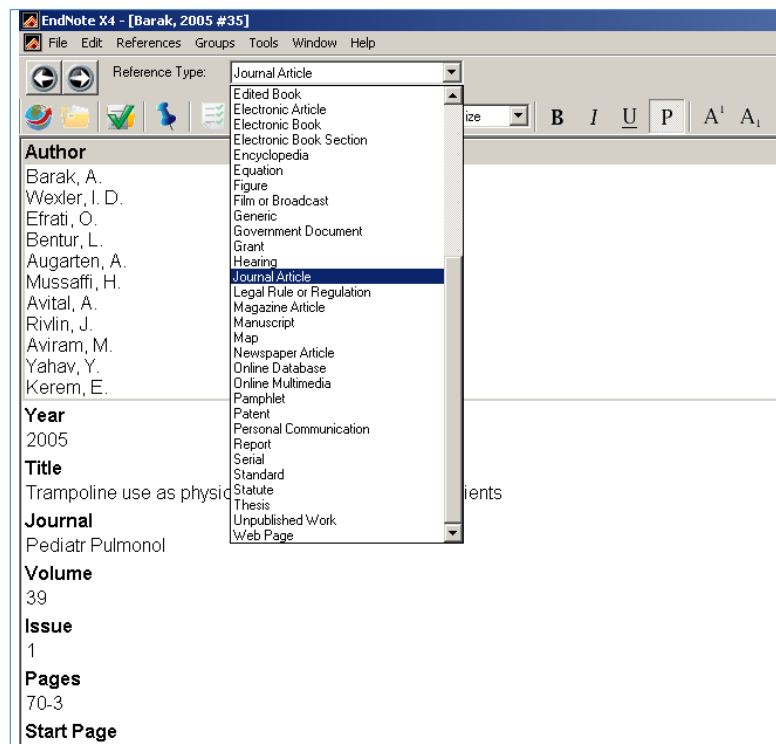
Outline

1. Collecting references
- 2. Managing and organizing references**
3. Exporting/editing citations and bibliographies

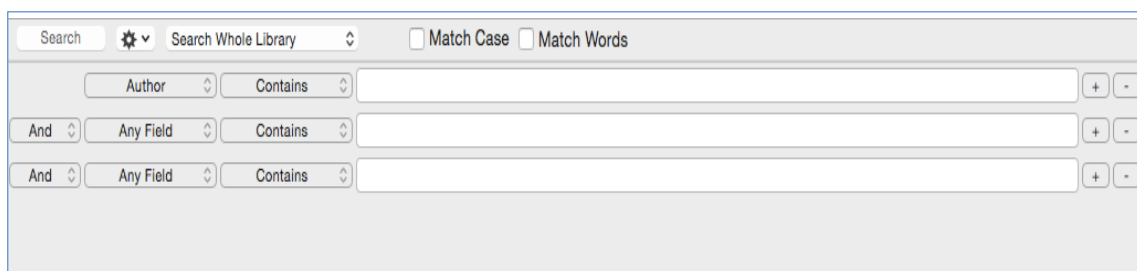
2. Managing references



Managing references: types of references



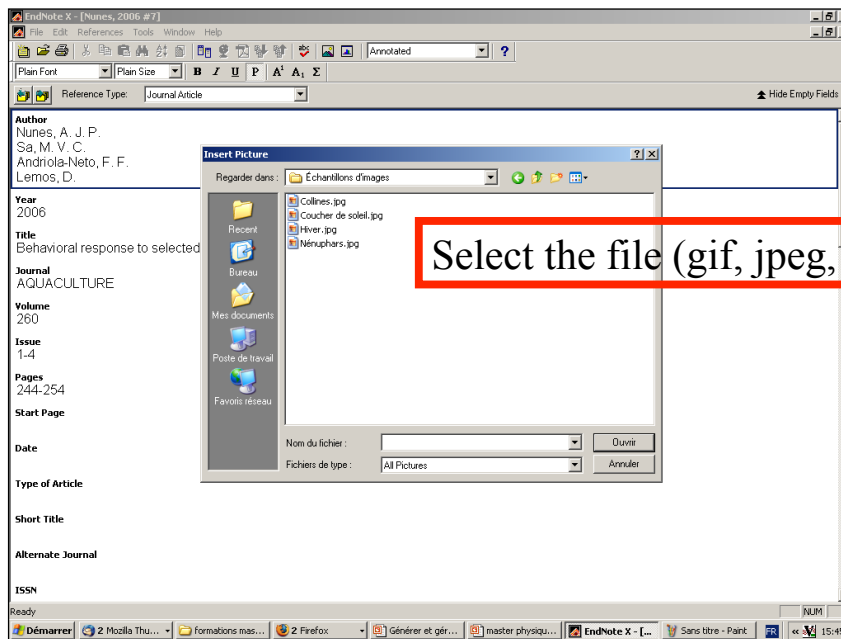
Managing references: search panel



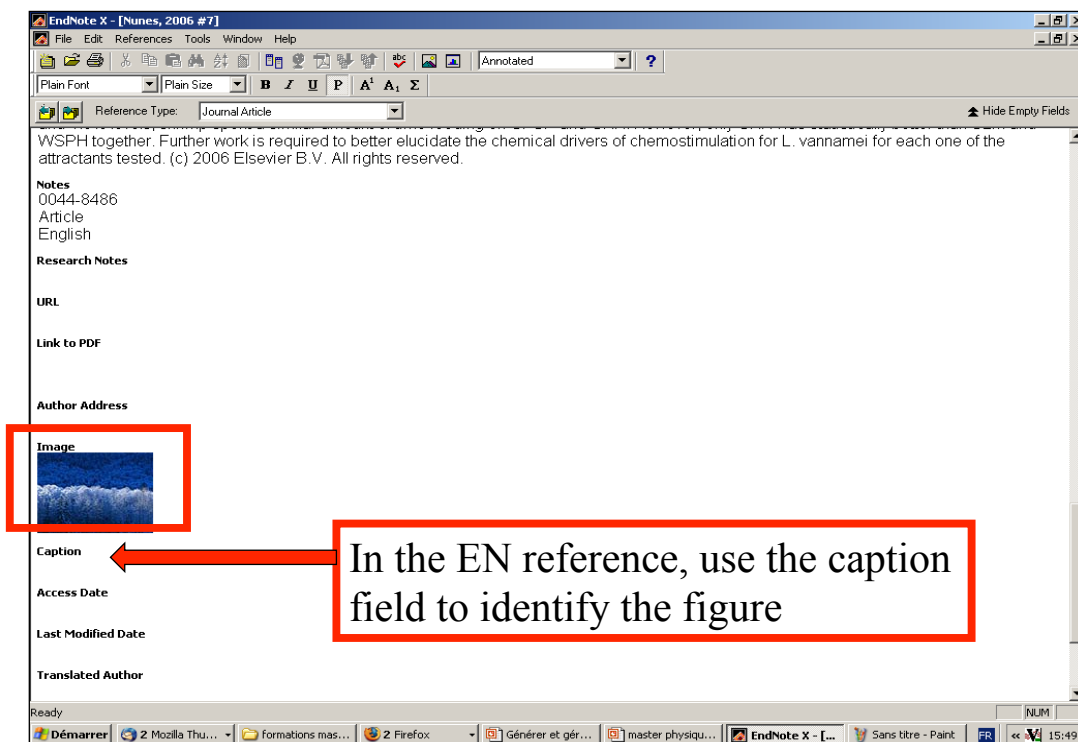
Specify the term of your query, the field to be searched, the boolean operators to be used etc. in order to retrieve a given reference in your library

Managing references: attach a figure to a reference

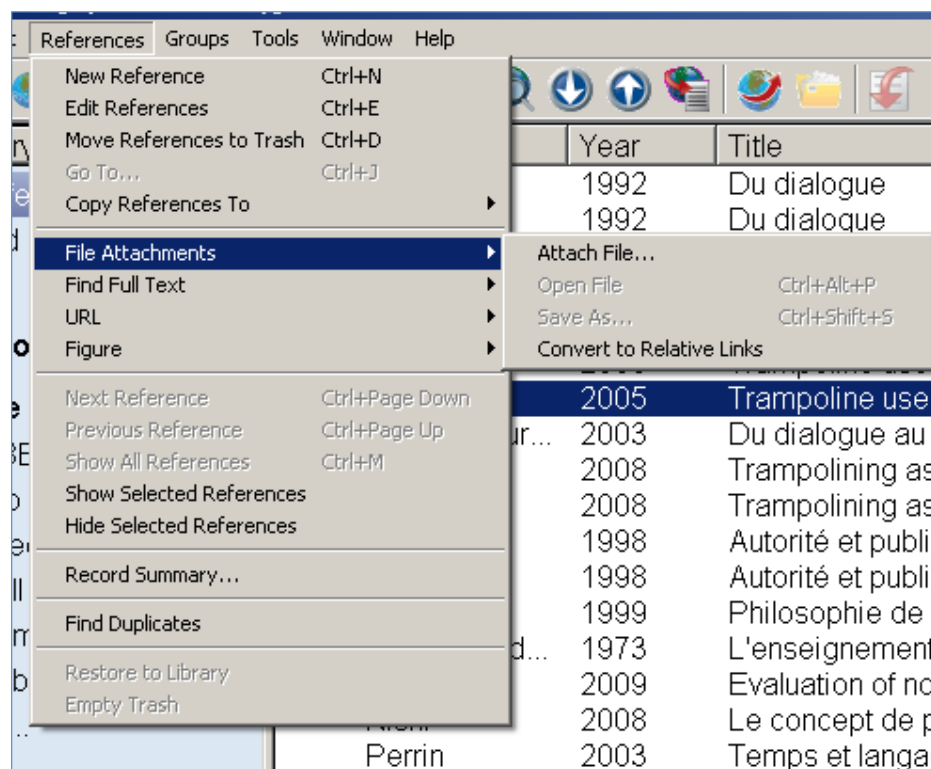
Menu *Reference* → select *Figure*



Managing references: attach a figure to a reference

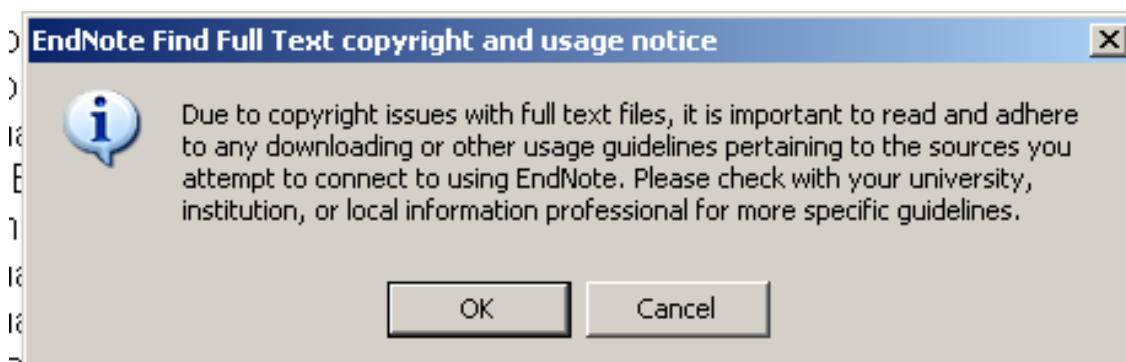


Managing references: attach a file to a reference



Find Full Text

Depends on access and university subscription



Find Full Text: Access via URL

Find Full Text

Searching... (1)

➔

Find Full Text

Found URL (1)

Pediatric pulmonology
 Pediatr Pulmonol. 2005 Jan;39(1):70-3.

Research Notes

URL
<http://www.ncbi.nlm.nih.gov/pubmed/1553>
<http://onlinelibrary.wiley.com/doi/10.1002>

File Attachments

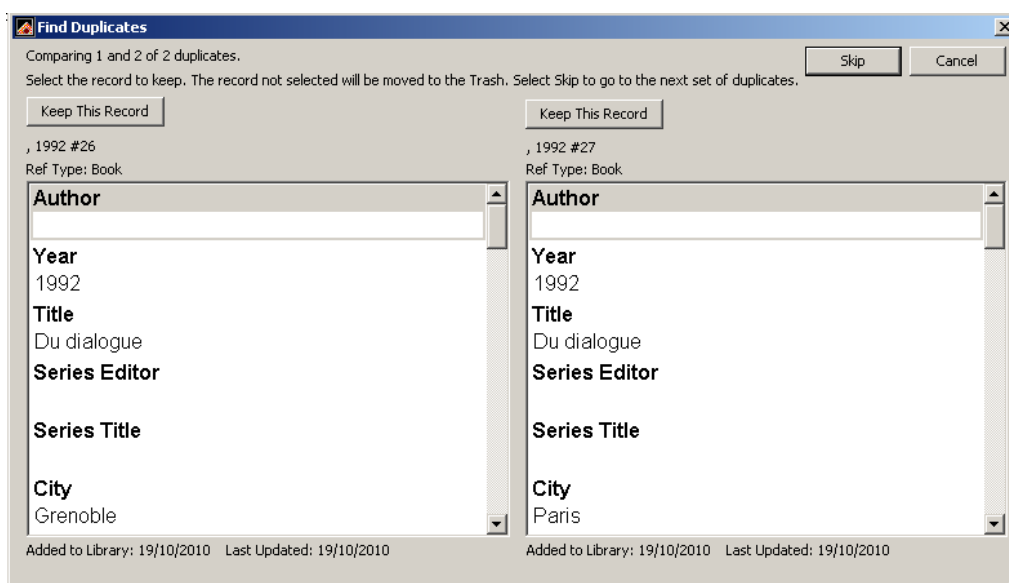
Author Address
 National Center for Cystic Fibrosis, Edm

Managing references: find duplicates

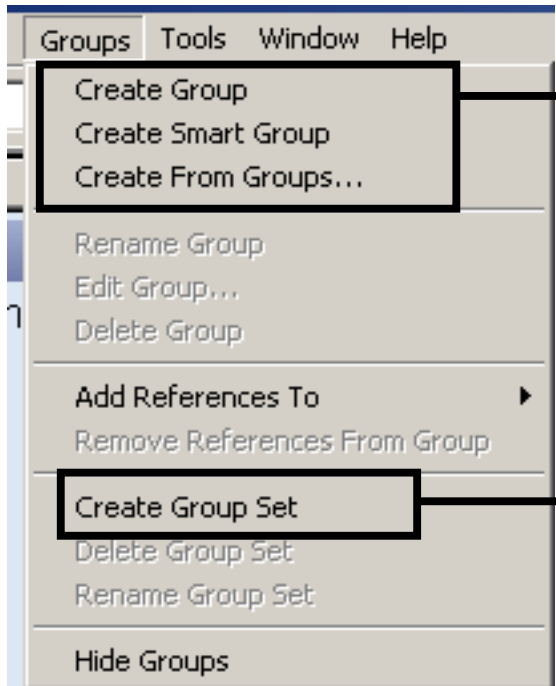
A given reference can be imported several times...

To eliminate duplicates, clic on *Find duplicates* in the menu *References*

Then chose the version of the reference you would like to keep



Managing references: Creating groups of references



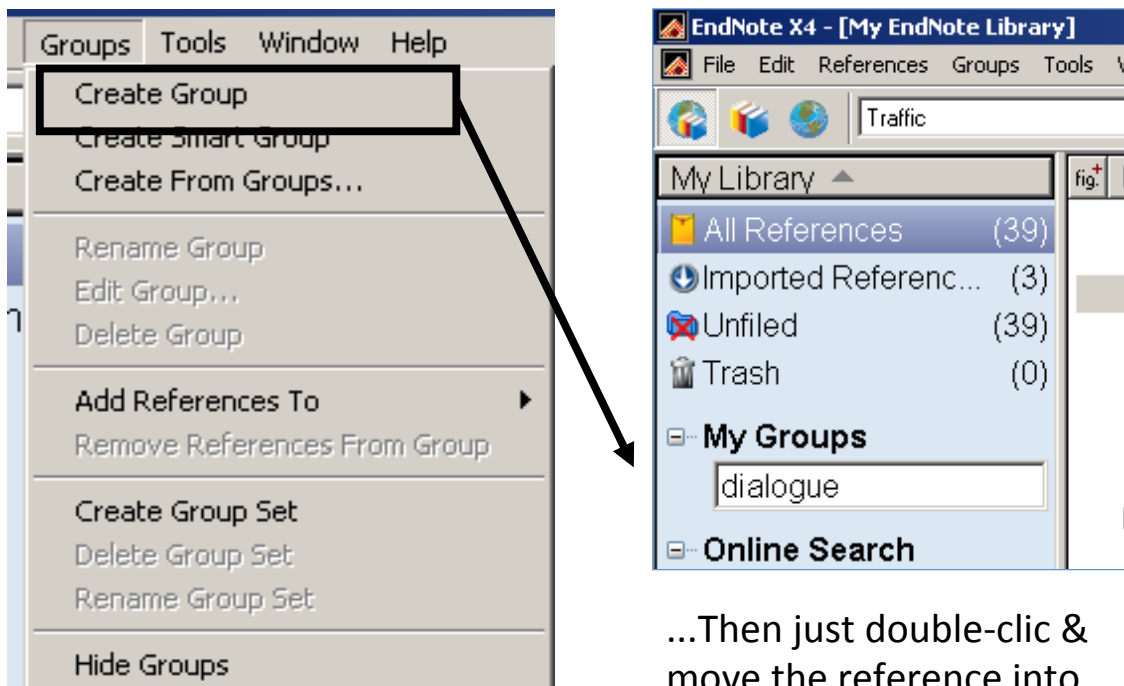
The screenshot shows the 'Groups' menu in EndNote X4. Two items are highlighted with black boxes and arrows pointing to a red-bordered text box on the right:

- Create Group** (arrow points to the first bullet point)
- Create Group Set** (arrow points to the third bullet point)

The red-bordered box contains the following text:

- To create folders → manual classifying
- *Smart groups* → automatic classifying corresponding to a query
- Combination of groups (with AND, OR booleans)
- To create a folder of folders

Managing references: Creating groups of references

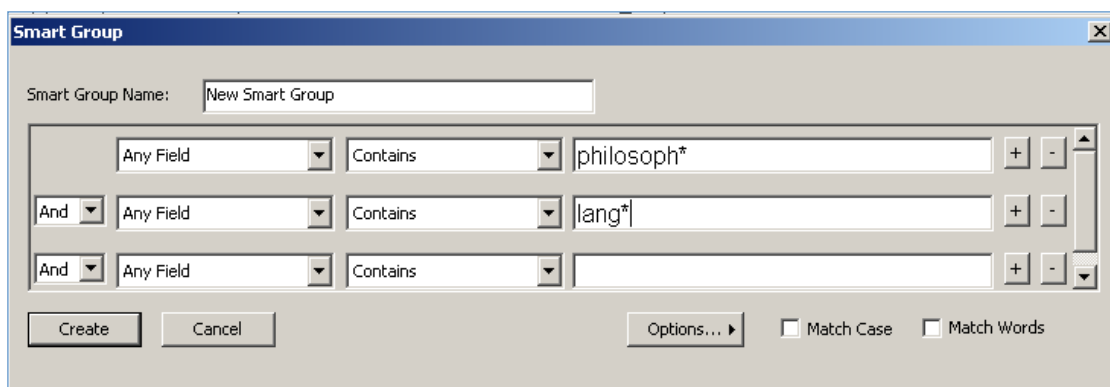


The screenshot shows the 'Groups' menu on the left and the 'My Groups' list on the right. An arrow points from the 'Create Group' menu item to the 'My Groups' list. The 'My Groups' list shows a folder named 'dialogue' under the 'My Groups' section.

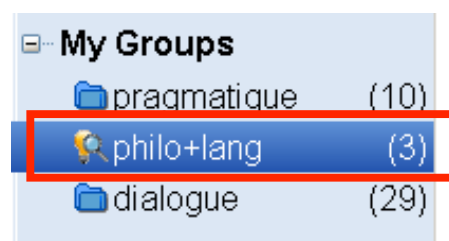
...Then just double-click & move the reference into the folder

Managing references: Create a smart group

A smart group is a group related to a query → automatically filled in

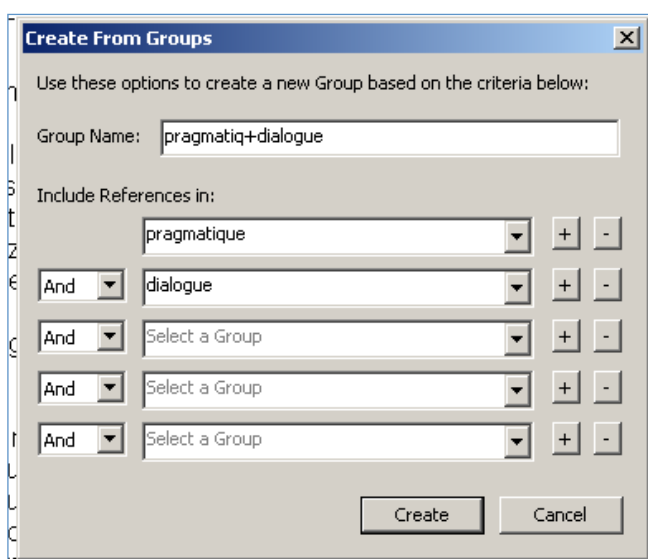


left panel →



Managing references: Create from groups

Intersection or merge of existing groups of references



left panel →

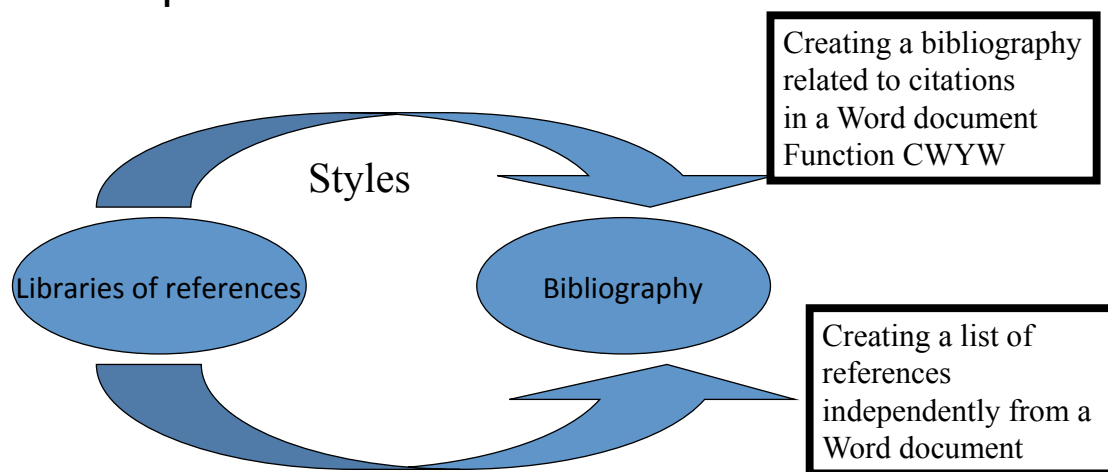


Outline

1. Collecting references
2. Managing and organizing references
- 3. Exporting/editing citations and bibliographies**

3. Exporting/editing references

- Principles

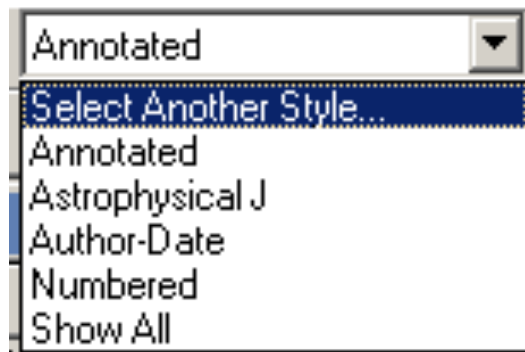


Exporting/editing: output styles

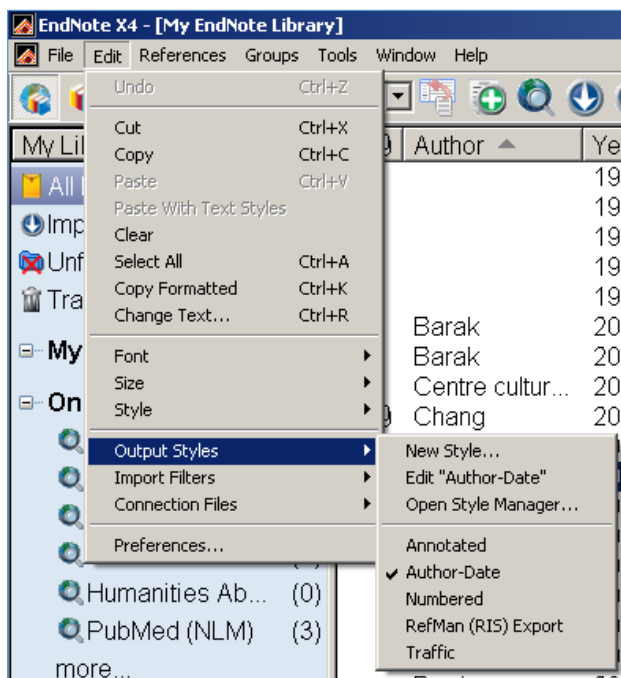
There are thousands of bibliographic styles, most of which correspond to academic journals.

3 main types of styles:

- author date
- numbered
- footnote



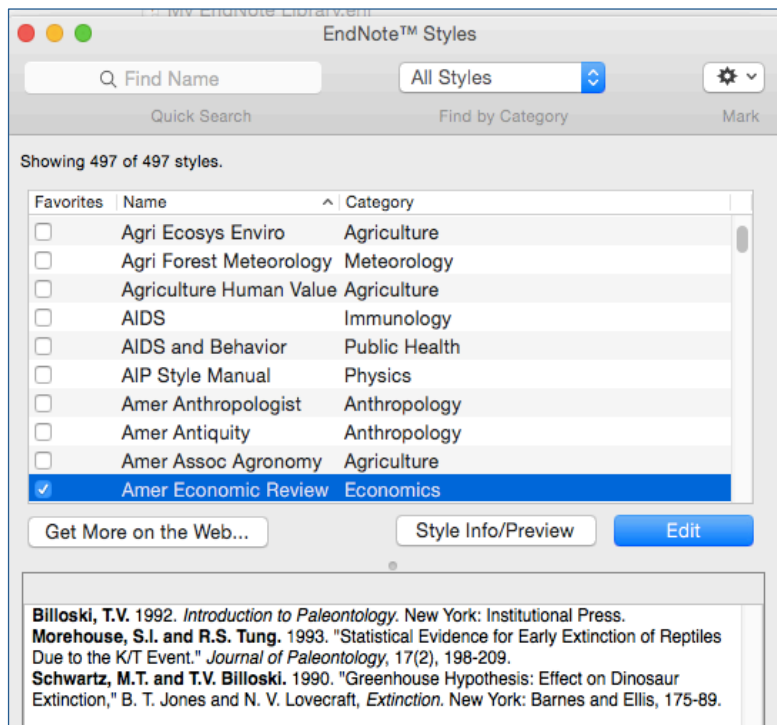
Exporting/editing: output style



Menu Edit → Output styles

- To create one's own style
- To edit and modify an existing style
- To *Open style manager*

Exporting/editing: style manager



Category: domain

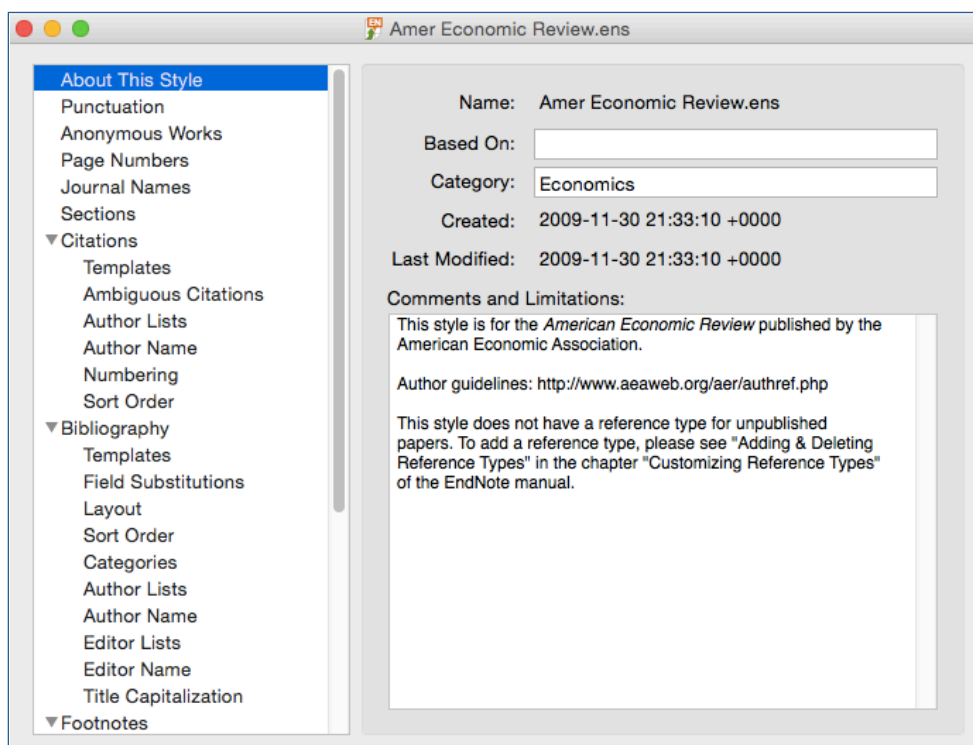
Edit: modify

Style info: description

Or

Style preview: example

Editing a style



Downloading a style

At EndNote website: <http://endnote.com/downloads/styles>

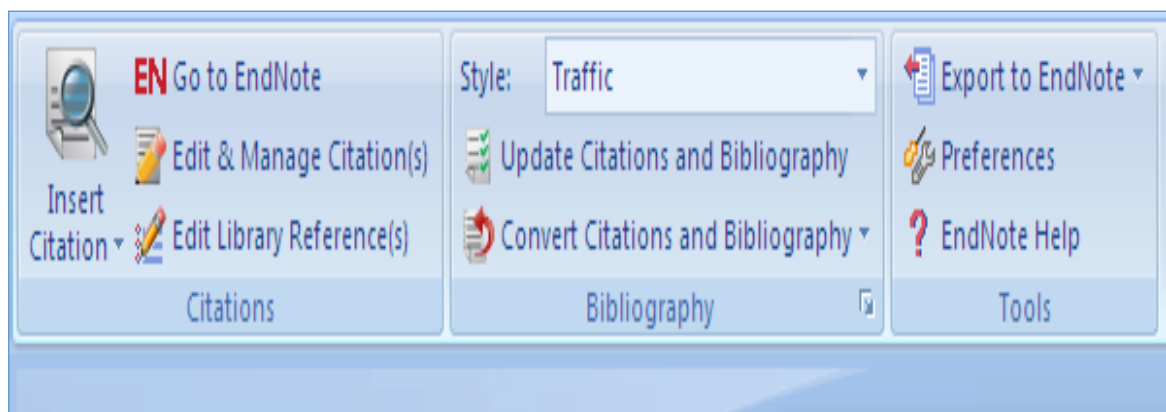
Use the Style Finder below to search for a style name and/or citation style and/or publisher.

Style or Journal Name	Citation Style	Publisher		
Contains	Is one of - Any -	Contains		
Reset Apply				
Style or Journal Name	Citation Style	Discipline	Date	
Ecohydrology & Hydrobiology	Author-Year		2017-03-10	Download
Journal of Physiotherapy	Superscripted Number		2017-03-08	Download

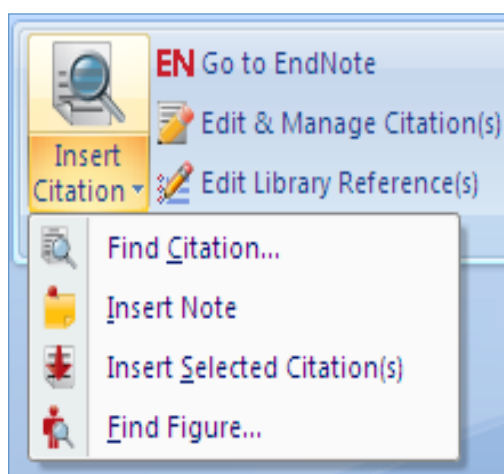
Cite While You Write

- It is possible to integrate citations from EN while you are writing a Word (or Open Office) document, and to generate automatically the corresponding bibliography.
- CWYW is the name of the interface between EN and Word
- First you will have to launch EN, second Word

Cite While You Write: EN functions within Word

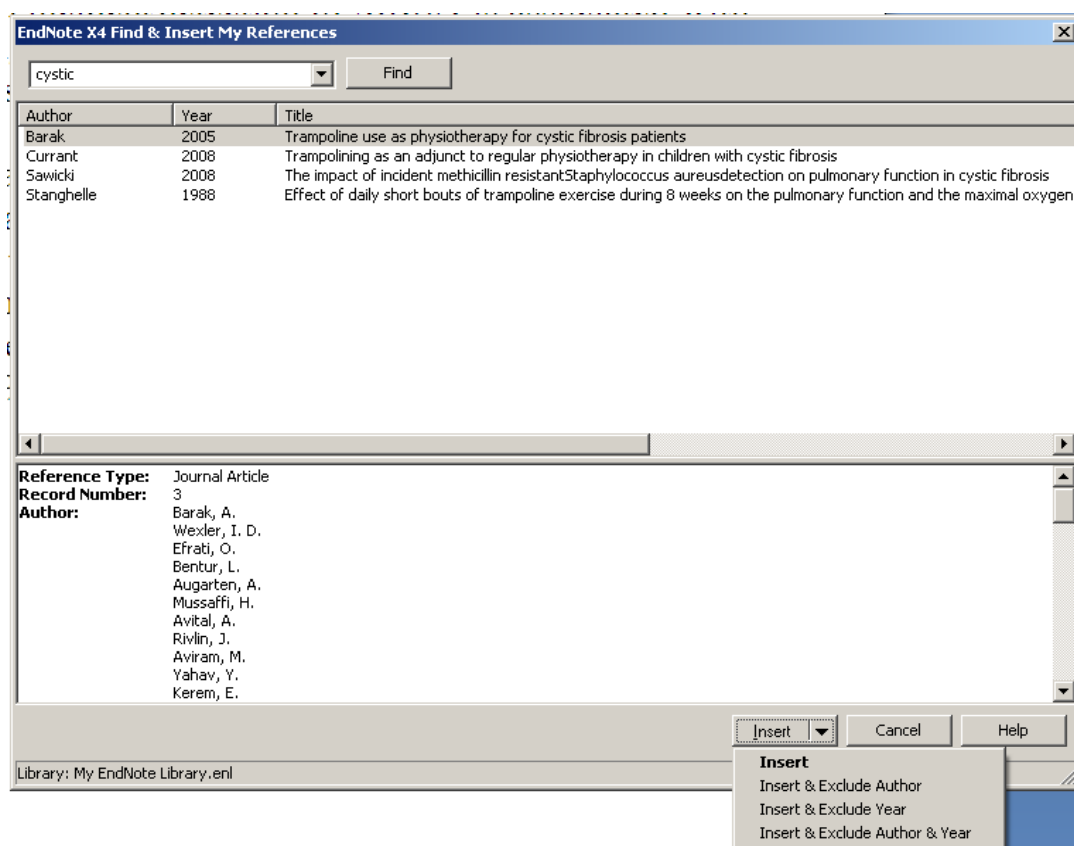


Cite While You Write: EN functions within Word



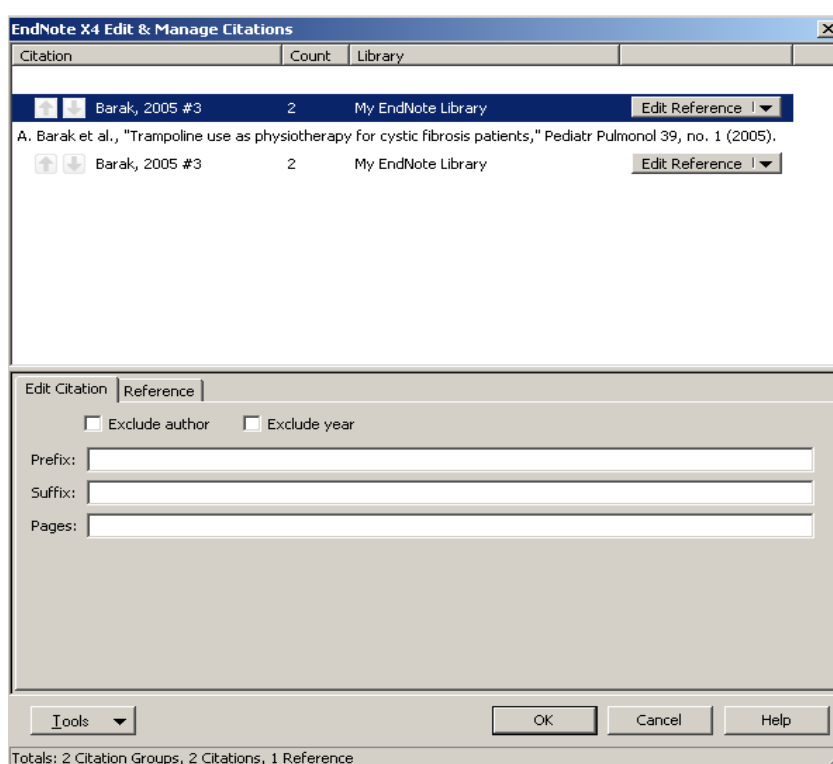
- **Find citation**: to retrieve a reference, and insert as citation in the text (bibliography is automatically generated)
- **Insert Note**: in case of numbered bibliography
- **Insert (pre)selected citations**: from EN to the text
- **Find figure**: to find and insert an EN figure
- **Edit and manage citation(s)**: to modify a citation in the text, add a prefix, exclude date or author name, etc.
- **Edit library reference**: to modify a reference in the EN library (ie directly in EN)

Cite While You Write: *Find citations*

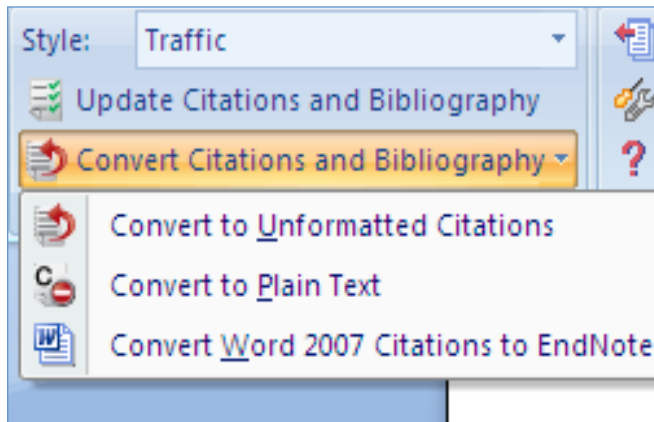


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Cite While You Write: *Edit and manage citations*



Cite While You Write: other functions



- Style: modify active style
- Update citations and bibliography: to match the changes performed in the library references
- Convert: modify the format (be careful about plain text conversion → irreversible)

Cite While You Write: other functions

