

EndNote

Wichor Bramer | Christa Niehot | Carola van Aart | Maarten Engel
 Information specialists Medical Library (Ae-327) – Erasmus MC
 info.mb@erasmusmc.nl | medbib.erasmusmc.nl
 phone: (010-70) 43785

1.	What can EndNote be used for?	1	work	Home
2.	Use at work or at home	1		
3.	Creating a new file in EndNote	2		
4.	Exporting from PubMed to EndNote	2		
5.	Searching PubMed via EndNote	2		
6.	Importing from Google Scholar	3		
7.	Importing books from OCLC WorldCat	3		
8.	Book chapters.....	3		
9.	Manually adding records (websites).....	4		
10.	Saving files	4		
11.	Find Full Text.....	5		
12.	Adding pdfs manually	5		
13.	Importing pdfs already on your computer	5		
14.	Deduplication	5		
15.	Finding reference updates	5		
16.	EndNote + Word : Formatting a concept publication.....	6	work	Home
17.	Re-activating Cite-While-You-Write	6		
18.	Inserting citations	6		
19.	Selecting the correct style for a specific journal or publication	6		
20.	Deleting and managing references	7		
21.	Repairing errors	7		
22.	Alter References in EndNote, not in Word	7		
23.	Changing the appearance of in text references.....	7		
24.	Prevent errors: turn off instant formatting	7		
25.	Using Groups.....	8		
26.	Full or abbreviated journal titles	8		
27.	Export to Excel	8		
28.	Export to Other reference management software (e.g. Covidence)	8		

homework

1. What can EndNote be used for?

EndNote can be used for the Management and storage of bibliographic data (references). For that it imports references from databases (such as PubMed and Embase). Its original and primary goal is to create and format reference lists for publication in scientific journals. However it can do more than that. It can be used as a personal library especially since it can automatically download and store full text of the articles. Many existing and experienced users of EndNote use it in a wrong way. They will only use it for creating reference lists, creating a file for each project stored in the folder for that project. Better is to create one large EndNote file that contains all your references for all your projects and to save this file on a general location in your drives and folders (see 10 Saving files)

2. Use at work or at home

If you want to use EndNote for the first time on an Erasmus MC workstation you have to install it first via the Software Center. Click on the start button and search for software center. In the Software Center search for EndNote. Click on the EndNote 20 icon to install the software. Open EndNote on your work computer: Start > All Programs > Erasmus MC > My Office > EndNote. For repeated use it is recommended to pin the program to the taskbar. For home and personal use we recommend the "mijn werkplek" application. EndNote is standard installed on that application.

3. Creating a new file in EndNote

When EndNote is opened for the first time, you get the choice to open an existing library or create a new library. If EndNote is opened for a second time, the most recently used library will be opened automatically. Data are not stored in EndNote but in the libraries that can be opened with EndNote. It is essential to remember where the files are located. We advise to create one large EndNote-file to store all references from different projects together. You can use groups to differentiate between different projects (see paragraph 25 Using Groups).

Exercise homework:

For this workshop, create a new EndNote file with the name My EndNote Library on your computer's desktop.

4. Exporting from PubMed to EndNote

After having performed a search in PubMed (optional: select a list of references you want import).

- First open the EndNote library in which you want to import references
- Go to the PubMed website (www.pubmed.gov)
- Perform a search
- Click Send to > Citation manager
- Choose the number of references you want to export (All results is recommended) and click on Create File
- Open the file pubmed-[...]-set.nbib, which will import the references into the current EndNote library.

Exercise homework:

Go to www.pubmed.gov and search for *plants cardiovascular therapeutics*. Export all results to your EndNote library

5. Searching PubMed via EndNote

In EndNote: Click in the left menu Online Search > PubMed (if not visible: Click more and select PubMed from the list). Select in the top part of the screen the field names and fill in one or more search terms.

The screenshot shows the EndNote 21 interface with the PubMed (NLM) search window open. The search term 'plants cardiovascular therapeutics' is entered in the search box. Below the search box, there are options to clear the search and search options. The search results are displayed in a table with columns for checkboxes, ID, Author, Year, Title, Journal, and Pages.

	#	Author	Year	Title	Journal	Pages
<input type="checkbox"/>	29	Huang, J.; Teixeira, A. P.; Gao, T...	2025	Aspirin-responsive gen...	Nat Commun	2028
<input type="checkbox"/>	30	Xu, J.; Kang, L.; Tai, B.; Liu, C.; Z...	2025	The stems of Syringa o...	J Ethnopharmacol	119563
<input type="checkbox"/>	31	Lin, F.; Xu, L.; He, Q.; Chen, Z.; Z...	2025	Plant-Derived Nanoves...	Pharmacol Res	107675
<input type="checkbox"/>	32	Faivre, A.; Dalga, D.; Consoli, I.; ...	2025	[Impact of diet on chro...	Rev Med Suisse	388-392
<input type="checkbox"/>	33	Rosenzweig, D.; Lamm, P.; Sch...	2025	Use of Ultra-Hydrophil...	Medicina (Kaunas)	
<input type="checkbox"/>	34	Seyyedi-Mansour, S.; Donn, P.; ...	2025	Citrus aurantium Flowe...	Molecules	

Click [Search] and select the number of records you want to import by clicking on the number at the top of the table. To add the references to your library select the references you want to import by checking the checkboxes before the references, or click on the top most check box to check all shown references. Then click on the green plus sign at the right.

Be careful! This can go wrong easily

It can be difficult to be in control over what will be imported. It can happen that EndNote starts importing too many irrelevant references into your neatly built-up library with only relevant articles. Use this method only for adding known relevant references from PubMed directly into EndNote, but not for larger contextual search strategies. Search for known reference using (first) author name, first page number, and year or to search by PMID.

Exercise homework:

Using "EndNote Online Search" search PubMed for articles on *plants cardiovascular therapeutics*. You will see a huge difference in numbers of references, compared to the previous results directly in PubMed. Apparently EndNote searches PubMed in a different way than when PubMed is searched directly.

Import the first 100 records in your EndNote library.

Now skip the next pages and continue with the homework on paragraph 16 *EndNote + Word : Formatting a concept publication* on page 6. What follows below will be explained during the workshop and is not part of your preparation.

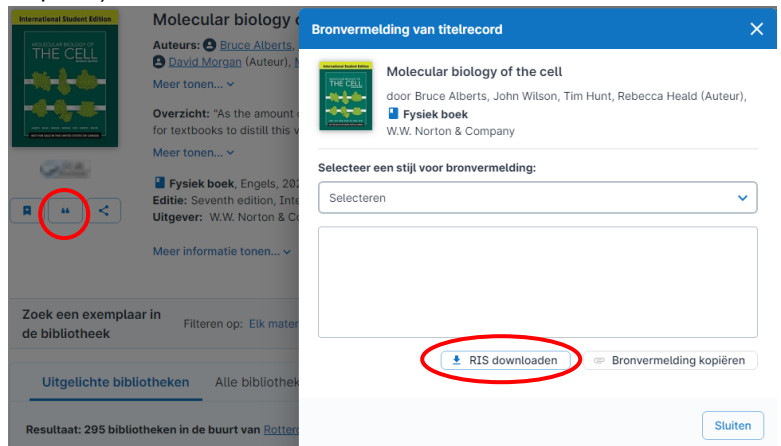
6. Importing from Google Scholar

- Go to scholar.google.com
 - Tip: add /ncr ("no country redirect") to stay on the English version of any Google product: scholar.google.com/ncr This also works with regular google (www.google.com/ncr)
- Click on the three lines to open the menu ☰
- Click on the gear for settings ⚙️
- Select Bibliography manager, Show links to import citations into: <select EndNote from the list>
- Click Save
- Search an article you want to import into you library. You can import only one at a time.
 - An easy way to search for a known reference is by combining two authors with a year *bramer giustini 2016*
- Click on 'import into EndNote' for that article.
- Open the resulting file (scholar.enw) and the reference will be imported directly into the current EndNote file, or when EndNote is not opened, the last opened EndNote file.

7. Importing books from OCLC WorldCat

OCLC WorldCat is a worldwide library resource that contains references of more than 2 billion books, theses, and grey literature (such as government reports).

- Go to www.worldcat.org
- Search for a known book for instance: *Alberts Cell*
- Click on the desired title. Make sure to select the correct version.
- You will get a notification to go to https://eur.on.worldcat.org (recommended). However, ignore that.
- At the left side of the page you will see three buttons, click on the middle button with the quote (Cite or export ...)
- Click on the button [Download RIS].
- Open the .ris file that has been created and the reference will be imported into your open or most recently used EndNote immediately.



8. Book chapters

When referring to only part of a book you can choose to refer to a specific book chapter. That is especially useful in edited books where distinct chapters are separate articles on certain topic authored by specifically mentioned authors. The general rule is to cite the whole book if you use more than 2 chapters, but up to 2 chapters you can cite each of the specific chapters.

You cannot import a chapter directly into EndNote but you can easily create one adapting the citation for a book:

- Use the above explanation (see paragraph 7 above *Importing books from OCLC WorldCat on page 3*) to import a reference to the book from which you want to cite a chapter
- Double-click on the imported reference for the book, and click in the top right corner on Edit
- Change the Reference Type from Book to Book Section
- Cut all authors and paste them in the field editor
- Cut the Title and paste it in Book Title
- In the field Author, type the authors of the chapter, in the format Last Name, First Names. Place each author on a separate line
- In the field Title, type the title of the chapter (or copy it from the table of contents in OCLC WorldCat)
- Add the page numbers of the chapter in the field Pages.
- In the field Chapter at the bottom, remove the contents of the field and type the number of the chapter.

9. Manually adding records (websites)

Via References > New reference you can manually add new references. Especially helpful when citing webpages.

Select the correct Reference type and fill in the known data. For websites at Erasmus MC EndNote installation we have made a much smaller selection of fields that are important when referring to web sites.

How does EndNote treat author names?

	Jan Peter Boersma	→ Boersma JP
But:	Roy Gerth van Wijk	→ Wijk RGv
	Anne de Boer	→ Boer Ad
	World Health Organization	→ Organization WH

In these cases the translation goes wrong. To prevent this, type:

	Gerth van Wijk, Roy	→ Gerth van Wijk F
	de Boer, Anne	→ de Boer A
	World Health Organization,	→ World Health Organization

Use the comma between last name and first names, and place each author on a separate line

The same can go wrong when exporting and importing corporate author names from databases (an organisation as an author, instead of a person). In that case add a comma to the end of the authors surname, or to the end of the corporate author, and remove other commas in the authors name.

10. Saving files

Data in EndNote will be automatically saved. So no File > Save option for your libraries is available. There is an option Save a Copy: This option should never be used. It can be useful though just to see where the current EndNote record is saved on your system if you are unsure.

A frequently made error is to create an EndNote file for a single article or document that you add references to, and to save it in the project folder. We recommend to work in one large EndNote library in which you combine all references for all your projects. In it you can use groups to organize your projects (see *chapter 25 Using Groups on page 8*). The best location for your file would be in a dedicated folder named "EndNote" immediately in the root of your drive with your personal files. Don't save your EndNote file in a project folder.

An EndNote library consists of two parts: a .enl file and a .Data folder, these need to be in the same folder and have the same name. Both of these need to be present to open an EndNote library. If you were to mix your EndNote files with word documents the .enl file and .Data folder will be in separate locations in the list in Explorer, and hard to recognize as belonging together. If you rename the .enl file, rename the .Data folder accordingly. If you move one, make sure to move the other as well. Do not alter the contents of the .Data folder yourself, leave it as is.

Use File → Compress Library (.enlx) to create one file, e.g. for e-mailing. Use a .enlx file only once and throw the .enlx file away afterwards.

11. Find Full Text

EndNote has a search option for pdf files of your references and may retrieve up to 50-70% of them when you are working within Erasmus MC IP-range (on your Erasmus MC computer or MijnWerkple application). Select the references you want to download and click on the icon on the right or go to References > Find Full Text > Find Full Text. If a pdf is found the paperclip icon will appear. To open the pdf, open the tab Summary and click on the file name at the top of the right tab, and click open.

If pdfs are not found automatically you can try to find reference updates first (*see also chapter 15 Finding reference updates on page 5*)

12. Adding pdfs manually

If the pdf cannot be downloaded automatically in EndNote, check access to the article via Google Scholar. You can download the pdf manually, save it temporarily, e.g. in your downloads folder, and then add it to the reference in EndNote. After adding the file you can remove that temporary file, because it is now stored in the .Data folder.

- Click on the reference for which you have downloaded a pdf
- Select the button "Attach file" in the window on the right side and select the correct pdf file

13. Importing pdfs already on your computer

If you have a folder with pdfs that you have downloaded before, in some cases these can be imported automatically.

- Go to File > Import > Folder. Open the folder that contains your pdfs. Most pdfs have metadata attached to the pdf, they are indexed automatically.
- Remove the records that did not import properly (they will display the file name as article title)
- Manually search the articles for the pdfs that were not automatically imported using first author and page number in the Online Search > PubMed (NLM).
- Let EndNote try to find the pdfs for these articles automatically (*see 11 Find Full Text on page 5*)

For those references that EndNote did not find the pdf automatically, manually attach the file to the corresponding reference.

14. Deduplication

For non-systematic reviews where only one database was used deduplication can be done rather simply. For the simple deduplication follow these steps:

- Click All References and select a record
- Go to Library > Find Duplicates
- Ignore the screen: 'Find Duplicates', and click [Cancel]
- Press Delete on your keyboard

After deduplication it is recommended to empty your Trash (Right click on Trash > Empty Trash) to remove the real duplicates which you don't want to review anymore. If in later phase one or more of the references are deleted by accident you can recognize these in the Trash and restore them to the library by right clicking and selecting restore to library.

For SRs using multiple database the Medical Library uses a more exhaustive method, as the same article can be described in different ways among different databases.

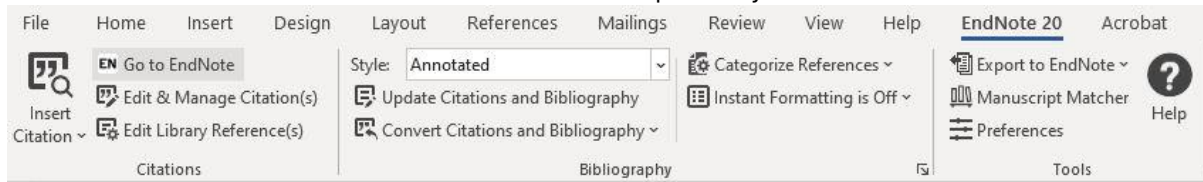
15. Finding reference updates

Using Endnote you can find updates of references. That way missing data can be added. Articles that had been added as Epub ahead of print will obtain automatically the correct page numbers. For this you can select one or more references and using the right mouse button choose for Find Reference Updates and follow the steps.

16. EndNote + Word : Formatting a concept publication

You can use EndNote for reference management in a Word document.

Choose tab EndNote 20 to see the 'Cite While You Write'-panel in your Word document:



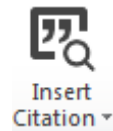
17. Re-activating Cite-While-You-Write

If EndNote in Word experienced problems, the EndNote functions can become invisible. You can make them active again by going to File > options > Add ins. At the bottom of that screen, select Manage disabled items and click Go. In the next screen, select 'endnote add in' and click Enable. Then click close and OK. After restarting Word, the EndNote options should again be visible. Another option can be to check the settings there under COM-Add-ins. Make sure EndNote CWYW is active.

18. Inserting citations

The most used way to add a reference is as follows:

- Click on the Magnifying glass above Insert Citation
- If a library is not yet open, open the desired EndNote Library.
- Search for the desired reference(s), for instance by Author name
- Select one or more references with (Ctrl-) Click and Click [Insert] to insert the selected citation(s) in the Word document.



There are however some very good alternatives that can be considered (for more advanced users):

- Selecting one or a few references in EndNote. Place your cursor at the correct spot in your word document. Click Insert Citation > Insert Selected Citation(s).
- Another way of inserting a reference is to drag a reference holding the mouse from the EndNote window into the Word window, dropping it where you want to insert the reference. This works best if you have two computer screens, with EndNote open on one screen and Word on the other.
- While writing a paper it can be convenient to add temporary references to the document in the form of {author, year}, for instance {Jansen, 2012}. After you added a few references like this you click: Update Citations and Bibliography. If these references are available in your EndNote library, this code is automatically replaced with the correct reference. If you want to add more references at the same location you can use a semicolon: {Jansen, 2012; Peters, 2005}. (Note: there might be a need to select the whole document (Ctrl-A) and right-click: Toggle Field Codes)

Exercise homework:

Create an empty MS Word document. Type some random text (*you could type =rand(4,5) or =lorem(4,5) and press enter*). Place the cursor where you want to add a reference, for example at the end of the first paragraph. Now add a reference there with one or a few of the methods described above.

19. Selecting the correct style for a specific journal or publication

From the drop down menu "Style" in the middle top column of the EndNote panel in MS Word, you can select an output format. Use 'Select another style' and select the desired style from the long list. Don't follow the authors instructions when they state the journal uses 'Vancouver' style. Often a journal has made adaptations to the so-called 'Vancouver' style. Probably a specific style for that specific journal will be available in EndNote.

Exercise homework:

Format your EndNote references in the style of the JAMA as described above

Place your cursor within the text of the first paragraph before your first reference and add a few extra references. Observe what happens to the numbering.

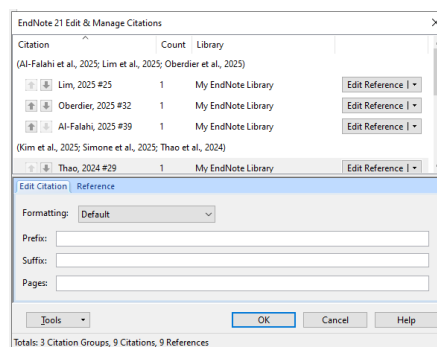
This is the last exercise for the homework. The rest will be discussed during the workshop and is not part of your preparation.

20. Deleting and managing references

For deleting and managing references use Edit & Manage Citations, so you can:

- Add or remove citations
- Alter the order of citations
- Alter the data of the reference in EndNote
- Assign specific page number to certain references (take note that not every citation style will show these page numbers).

Edit & Manage Citation(s)



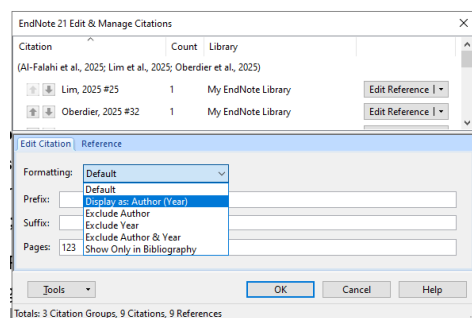
21. Repairing errors

Many errors can be solved using: Convert Citations or Bibliography > Convert to Unformatted Citations, followed by Update Citations and Bibliography

22. Alter References in EndNote, not in Word

If something is incorrect in the reference never make changes to the references in your Word document. If the data in EndNote are incorrect, go to EndNote to correct the data in the right fields. If the style is incorrect, either chose a different style or change the style (or have the librarian adapt the style for you).

23. Changing the appearance of in text references

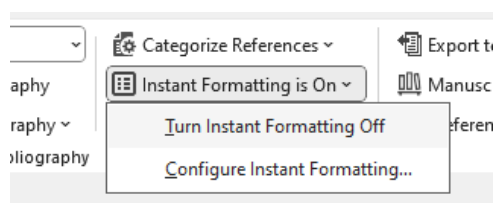


You can change how a reference is shown in the text. Especially with an Author-Date style such as APA you want to prevent phrases like "Jones et al (Jones, 2002) said that...". In that case you want only the year etween parentheses. To do so, right click on a reference and select edit citations > more. Select Formatting: Display as Author (Year).

With Prefix and Suffix you can add text to appear within the parentheses either before or after the citation.

Pages will add a page number to the in text reference. This is particulatly useful for a book when you want to literally quote a specific page. This will not be displayed in all styles, but using suffix instead you can force this.

24. Prevent errors: turn off instant formatting



EndNote can sometimes cause errors for large document with many references especially if the document contains other code or macros. In that case after each new reference the program will terminate. Switch this off to prevent problems (as shown in the figure): Instant formatting is On > Turn Instant Formatting Off.

New references will temporarily be shown as {author, year #recordnummer} in your document. After all desired references are added, save the word document, and then click Update Citations and bibliography. All references will be shown in the selected style.

25. Using Groups

You can create groups for certain articles or projects that you are working on. In stead of saving each project in a different EndNote library you can use groups within one large library for each project. Any opened Word document which contains references from the opened EndNote file is visible in the EndNote program as a Temporary group with the name of the document being edited. To make this group visible permanently:

- Right click on My Groups
- Select 'Create Group' and type the name of the project or article
- Go to the temporary 'Word document-group', select one of the references, press Ctrl-A and drag all items to the newly created group

References do not necessarily have to come from a Word document group to be added to this group

A Smart Group contains references based on a search query within this library.

A Smart Group can be used for automatically grouping articles on a certain topic, and will be filled automatically if new references that meet the criteria are added to the EndNote library, or when new PDF files meeting the criteria are added.

- Right click on My Groups
- Select 'Create Smart Group' and type a name
- Fill in your search strategy terms and Fields

26. Full or abbreviated journal titles

Most databases store their references with full journal titles. However, most journals prefer abbreviated titles in their reference lists. You can change this easily in EndNote

- Go to Library > Define Term Lists
- Select Journals and click [Delete List]
- Click [Create List], name it Journals and tick: Journals list
- Click [Import List]
- Open the file Medical.txt
- Click Link Lists
- With Journal (secondary title) select Journals

It seems like nothing has changed, but the journal can now choose to use the full or the abbreviated titles. In EndNote the abbreviations are now connected with the full titles.

27. Export to Excel

- Sort and select the desired references in EndNote
- Click File > Export
- Select a location and provide a name for the file. Use the extension .csv
- Select under Output Style :
- Select Another Style: _CSV-Excel
- In Windows explorer, go to the file you created and open it. MS Excel will be opened.

28. Export to Other reference management software (e.g. Covidence)

- Sort and select the desired references in EndNote
- Click File > Export
- Select a location and provide a name for the file. Use the extension .ris
- Select under Output Style :
- Select Another Style : RefMan RIS
- This file can be opened in every possible reference software (RefWorks, Mendeley, Zotero)

29. Cooperating with others

We discourage the sharing of references or groups from libraries, which is often recommended by EndNote itself. There are many downsides to it, as you can only share from one library. This means that if, by accident you sync a different library, two libraries will be merged. Or EndNote can think the online references are not yet in your offline library and decide to add them.

You can share an EndNote library via OneDrive. Make sure to add OneDrive as a Virtual Drive to your computer's Windows Explorer. This can be done by opening the OneDrive app via the search bar, or by right clicking on the cloud in the right corner of your screen, next to the clock. IT department can probably help you with that.

Once you have connected OneDrive in your Windows Explorer you can save EndNote files in those folders.

However for safe use, do as follows:

- Right-click on the .Data folder of your EndNote library
- Select: "Always keep on this device"

