ENDNOTE X

EndNote X belongs to the family of software known as bibliographic management. It can be used with both Windows and Macintosh platforms. It can search Z39.50 compliant databases to which you have a subscription. It stores and manages references and images. In conjunction with a word processor, it automatically formats references and bibliographies.

This brief class will attempt to cover EndNote X on the Windows platform using Word 2007. Some of the topics to be covered are installation and updating the program, creating libraries, working with Term Lists, working with URL's, using Cite While You Write and Word 2007. Most of the information here has been designed for EndNote installed on the hard drive of a computer. Some of the features may differ if the program is on a network.

You can always check online for help at EndNote or http://endnote.com/. There are FAQ's and links for emailing technical assistance. This is also the site where you find the updates.

You may request assistance through the Reference Department of the Cleveland Health Sciences Library at 216-368-3218 or by email at hclref@case.edu.

This document covers some of the points. It is in outline format so you can take plenty of notes.

Cleveland Health Sciences Library, Case Western Reserve University

EndNote

- Installation
  - Startup Folder of Office
    - Check for the following two files:
    - EN10CWYW.dot and EN10Cwyw.wll
  - Open EndNote before opening Office
- Updates
  - Patches, Connection, Filters, Styles
- Create a library/Open a library
- Edit…Preferences
  - Folder locations
  - Open URL
  - Display fields
- Import .txt files of references
- Export citations directly from databases
- Searching databases and saving files
  - PubMed
  - ISI Web of Science
  - CINAHL/Ebscohost databases
  - OhioLINK Databases - BIOSIS Previews
  - WorldCat
- Term lists
  - Journal titles & abbreviations
- Edit…Output Styles
  - APA 5th
- Print/Print Preview
- Export
- References
  - Sort
  - Duplicates
  - URL/PDF
- CWYW
  - Word, Insert Citation, Format Bibliography
  - Preferences – IMPORTANT!
- Help
  - Do not forget to consult this!

Word 2007
- Word Options
  - Trust Center
  - Add-Ins

PubMed
- Display – MEDLINE
- Send to – File
- Save as .txt
- Import filter is PubMed

ISI Web of Science
- Save tagged fields in a .txt file
- Import filter is ISI-CE

CINAHL/Ebscohost
- Add to Folder
- From Folder, Select all
- Export
- Generic Bibliographic
- Save
- File…Save As…
- Three drop-down windows:
  - *Name*.txt
  - Text file (.txt)
  - Western European (Windows)
- Save
- Import filter is CINAHL (Ebsco)

OhioLINK Databases – BIOSIS Previews
- Stored Records
- Export
- Use REFER
- Download
- Export Now
- Save
  - *NameREFER*.txt
- Import as REFER/BIBIX

WorldCat
- Marked Records
- Export…Export to…Text File
- Export
- Save
- Import as WorldCat (OCLC)

Searching with EndNote

 EndNote will search Z39.50 compliant databases to which you have a subscription, or library online public catalogs.

 Since PubMed is free to the world and Z39.50 compliant, you can search it. However, it does not default to Case Western Reserve University's URL and you will not get CWRU holdings. You can "trick" the program into giving you CWRU holdings by first logging into PubMed from CHSL therefore setting a cookie to which EndNote will default. PubMed will work remotely without VPN, but the electronic journals will not. You will not be able to determine free full-text.

 The ISI Web of Science is searchable since CWRU subscribes to it and it is produced by the same company as EndNote. Again, log in to ISI from CHSL's site to set the cookie for the holdings before using the online search feature. If you are accessing this database remotely, you must be using VPN or OhioLINK remote authentication.

Pulling Everything Together

       Be sure to open an EndNote library before opening Word. Do not have either program automatically open the other one. Whenever possible, always import an electronic citation into EndNote – there sometimes are problems with citations that have been entered manually displaying properly within Word, especially subsequent use of a previously cited reference. Word documents can be shared. If you reformat a shared document, you must have the corresponding library from EndNote open. Be sure to check what version of a journal title is in EndNote and what version is required by your output style. PubMed has a journals database where you can find full journal titles as well as journal title abbreviations. If you are citing an electronic resource, be sure to note the day you accessed the file and record it in EndNote in the appropriate field. If you link a.pdf file you have saved, it should be on the same computer drive as the EndNote program.

       Good luck and remember to read instructions, help screens and if all else fails, please contact me.

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