



Universität
Basel

Universitätsbibliothek

Introduction to EndNote 20

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HS 2023



Agenda Full Course

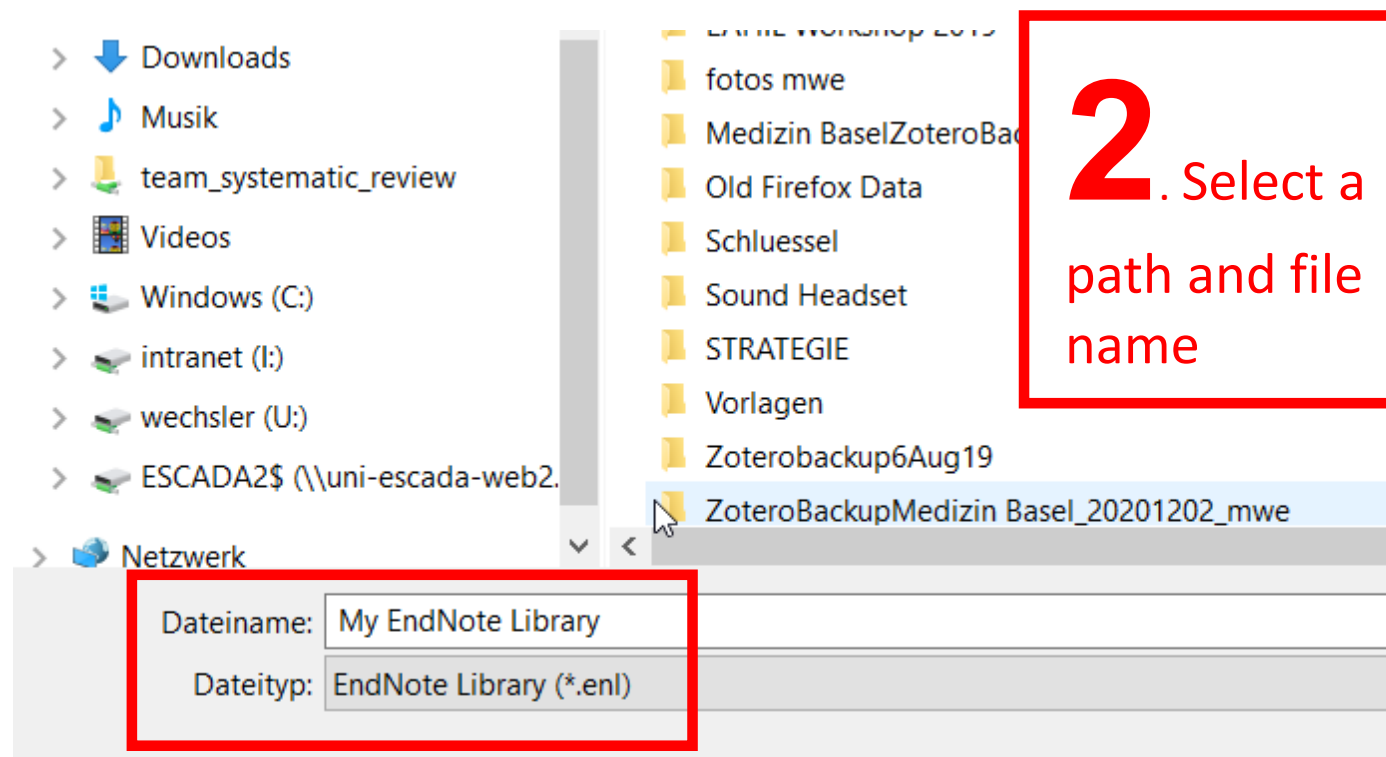
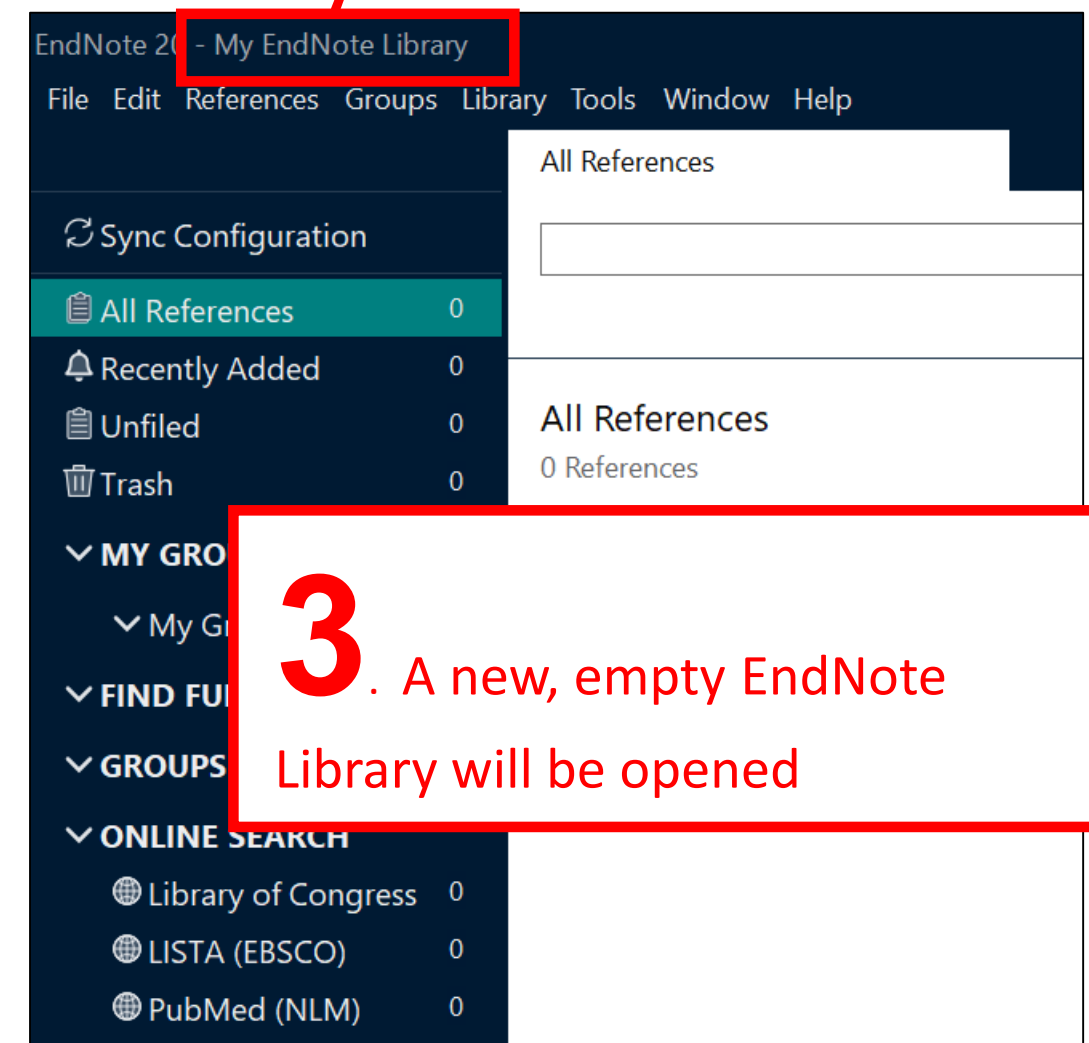
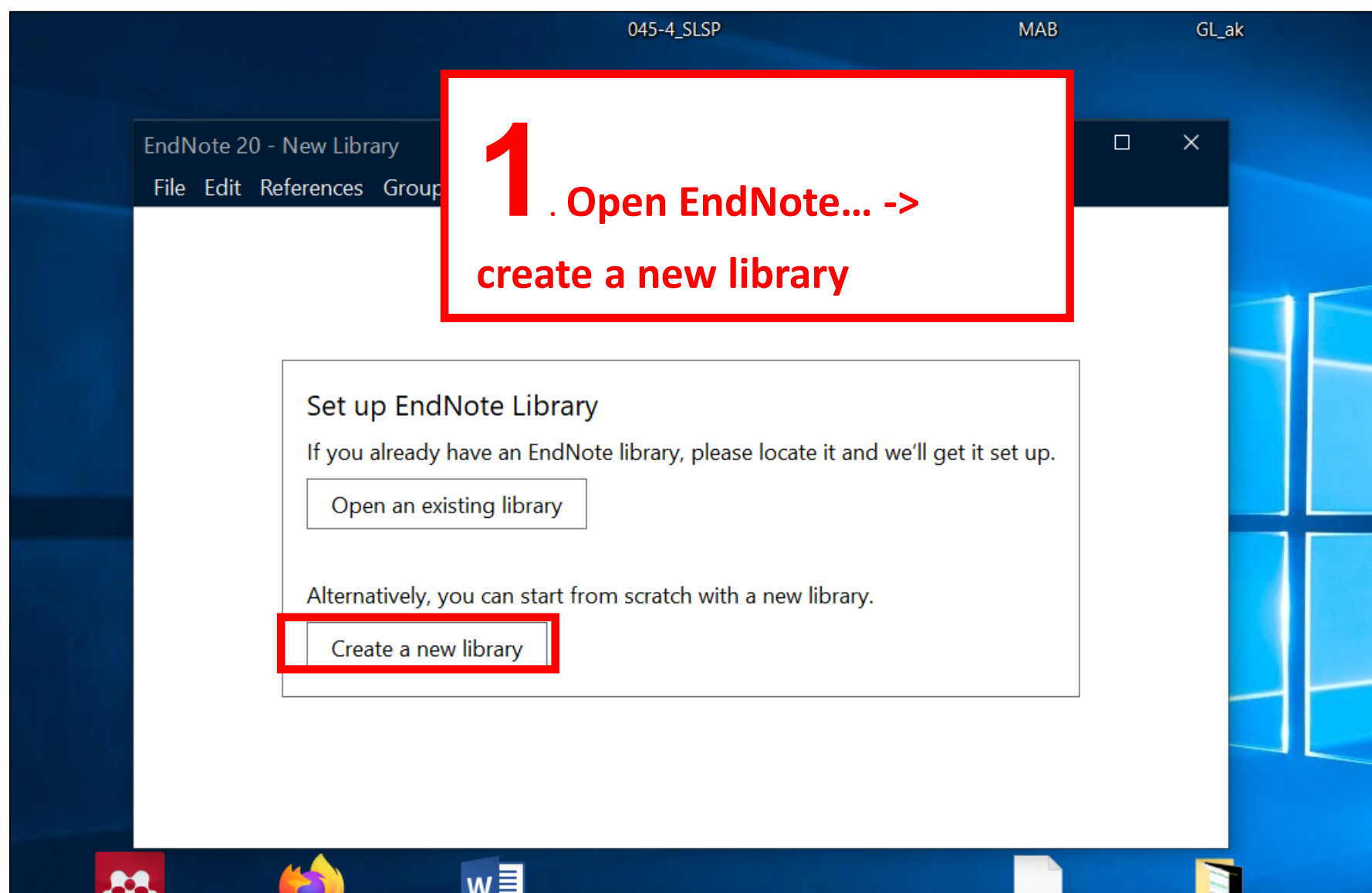
1. Getting started
 - Install EndNote; Create an EndNote-Library ; Term Lists
2. Search and collect references
 - With PubMed (PC; Mac)
 - With library catalogue swisscovery Basel
 - With google scholar
 - With PubMed, within EndNote
 - Create a reference from a PDF stored on your computer
 - Create a reference manually
3. Insert references into a Word document (CWYW)
 - View in Word / View in EndNote / Citation Styles
4. Manage references in EndNote
 - Groups / Edit references / remove duplicates
 - Search for fulltext articles (PDFs); administer PDFs
5. Web account and collaboration
6. Library sharing incl. PDFs
7. FAQs

Using EndNote with Google Docs ; Bibliography list after each chapter; Combining multiple word documents; add references from a PDF/word to Endnote

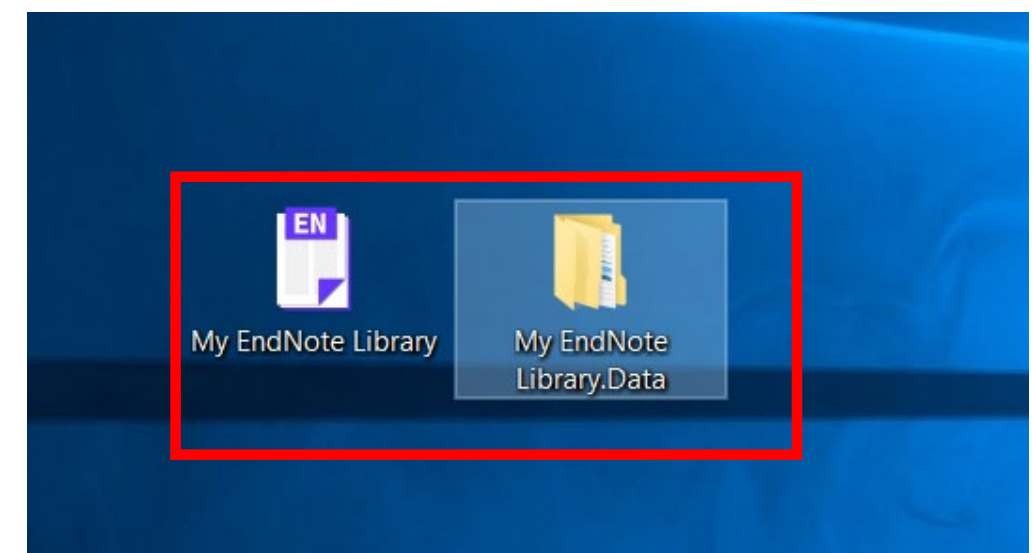
1. Getting started: Install EndNote (desktop version)

- **Campus license**
Students Uni Basel: via <https://asknet.unibas.ch>: 10.-/year;
Employees Uni Basel via IT-Department
- **Free trial version**
(30 days) <https://www.endnote.com/> -> *LOGIN*
- **System requirements**
Windows 10, macOS 10.14 or 10.15
MS Word, Apache OO, Libre Office, MS Word MacOS, Apple Pages
Firefox, IE, Safari, Chrome
Details: (<https://endnote.com/product-details/compatibility/>)

1. Getting started: Create a new EndNote Library



4. For each EndNote Library a folder (.Data) and a file (.enl) will be created.



1. Getting started: opening EndNote with Mac

<https://communities.apple.com/de/thread/252595385>:

“As you have just purchased and installed EndNote 20 in your Mac computer (first time for this computer presumably), you would have to create an EndNote library first in order to be able to see and use the EndNote 20 program.

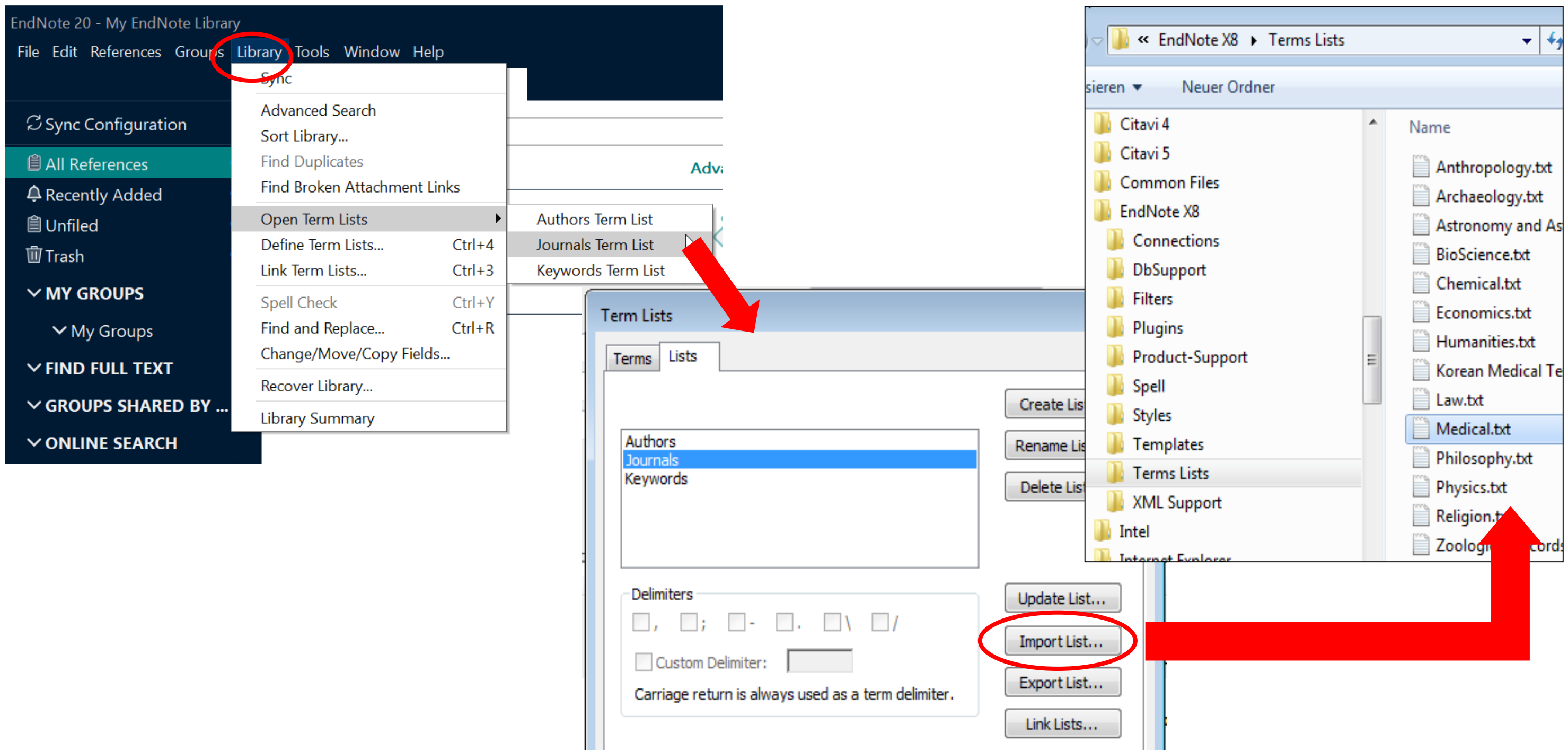
Please follow these steps:

1. Click on the EndNote 20 application icon in your dock/tray.
2. Click on the "File" menu at the top left of your screen. (You will notice it now says "EndNote 20").
3. After clicking "File" > Click "New" to create your EndNote library.
4. A window will be prompted for you to name your EndNote library and save it in a location. (You may save the library in the "Documents" folder or in your "Desktop") (It is recommended that the library is saved in your local drive).
5. After you have created and saved your library, the EndNote 20 program will be ready for you to use.”

1. Getting started: Term Lists

EndNote defines term lists of authors and journal titles as soon as references are imported.

If different sources (e.g. PubMed and Web of Science) are used the term lists may be inconsistent. Therefore it is recommended to use standardized term lists -> Menu *Library/Open Term Lists/Journals/Lists/Import List...*



Term lists have to be imported into every new library *before* importing new references

If you do it later the lists already imported must first be deleted:

Term Lists > Journals > Delete List

Afterwards: *Create List > Import term lists as described above*

2. Search and collect references: PubMed

NIH

National Library of Medicine
National Center for Biotechnology Information

PubMed.gov

malaria tann

Advanced Create RSS

Save

Email

Send to

317 results

Clipboard

My Bibliography

Collections

Citation manager

Cite

Share

MY NCBI FILTERS

RESULTS BY YEAR

317 results

Create a file for external citation

Selection: Selection (3)

Create file

Öffnen von pubmed-malariainf-set.nbib

Sie möchten folgende Datei öffnen:

pubmed-malariainf-set.nbib

Vom Typ: NBIB Formatted File (PubMed) (850 Bytes)

Von: https://pubmed.ncbi.nlm.nih.gov

Wie soll Firefox mit dieser Datei verfahren?

Öffnen mit ResearchSoft Direct Export Helper (Standard)

Datei speichern

Für Dateien dieses Typs immer diese Aktion ausführen

OK Abbrechen

5.

All References 3

Imported References 3

Recently Added 3

Unfiled 3

Trash 0

MY GROUPS

My Groups

FIND FULL TEXT

GROUPS SHARED BY ...

Advanced search

Imported References

3 References

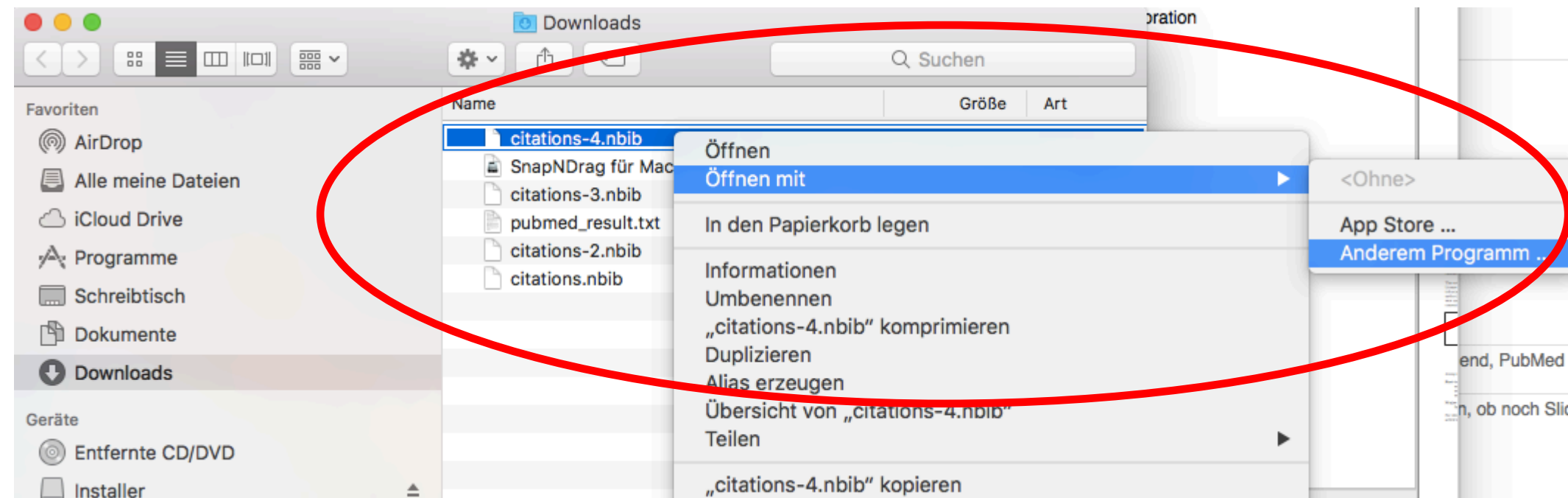
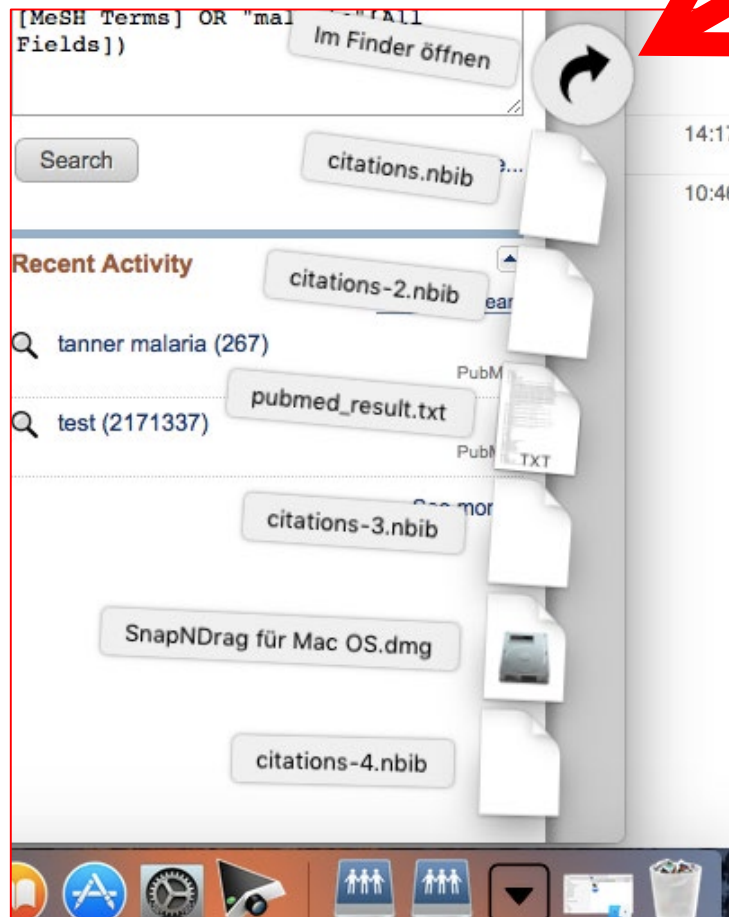
Author	Title	Journal	Year
Adhicary, ...	Malaria in Infants	Ind Med Gaz	1944
Langmea...	Malaria in an Infant	Proc R Soc ...	1914
Lopatin, G...	On the sudden death of children in ...	Pediatrica	1945

The imported references in EndNote

2. Search and collect references: PubMed, with MAC

Mac:

- Firefox: as described on previous slide
- Safari: 1.) Save data as a file 2) Open file -> open with ...EndNote



2. Search and collect references: Library catalogue (swisscovery Basel)

The screenshot shows a library catalogue record for the book "Ethics, medicine, and information technology : intelligent machines and the transformation of health care" by Kenneth W. Goodman. The record includes a book cover, title, author, publisher, and year. A sidebar on the left contains navigation links like "Top", "Senden an", "Links", "Ausleih- und Bes...", "Details", and "Ähnliche Titel". Below the title, there is a section for "Verfügbar bei Basel - UB Medizin Freihandbereich (UBM Med W 26.5-7)". A row of icons for sharing and downloading is visible, with the "RIS" icon circled in red and labeled "1.". Below this, a "Download" button is highlighted with a red arrow and labeled "2.". A red box labeled "3." is placed over the "Download" button. A dialog box titled "Öffnen von Primo_RIS_Export.ris" is open, showing the file name "Primo_RIS_Export.ris" and its type "Text Document (319 Bytes)". The dialog asks "Wie soll Firefox mit dieser Datei verfahren?" and has options "Öffnen mit", "Datei speichern", and "Für Dateien dieses Typs immer diese Aktion ausführen". The "Öffnen mit" option is selected, and the file is associated with "EndNote 20 (Bld 14672)". The dialog has "OK" and "Abbrechen" buttons.

BUCH
Ethics, medicine, and information technology : intelligent machines and the transformation of health care
Kenneth W. Goodman (Professor and Director, University of Miami Miller School of Medicine Institute for bioethics and Health Policy, Miami, FL, USA)
Cambridge UK : Cambridge University Press
2015

Verfügbar bei Basel - UB Medizin Freihandbereich (UBM Med W 26.5-7) >

Top
Senden an
Links
Ausleih- und Bes...
Details
Ähnliche Titel

Senden an

Permalink E-Mail Zitieren Drucken **RIS** BibTeX EndNote Excel

Codierung
UTF-8

2. Download

Öffnen von Primo_RIS_Export.ris

Sie möchten folgende Datei öffnen:

Primo_RIS_Export.ris
Vom Typ: Text Document (319 Bytes)
Von: blob:

3.

Wie soll Firefox mit dieser Datei verfahren?

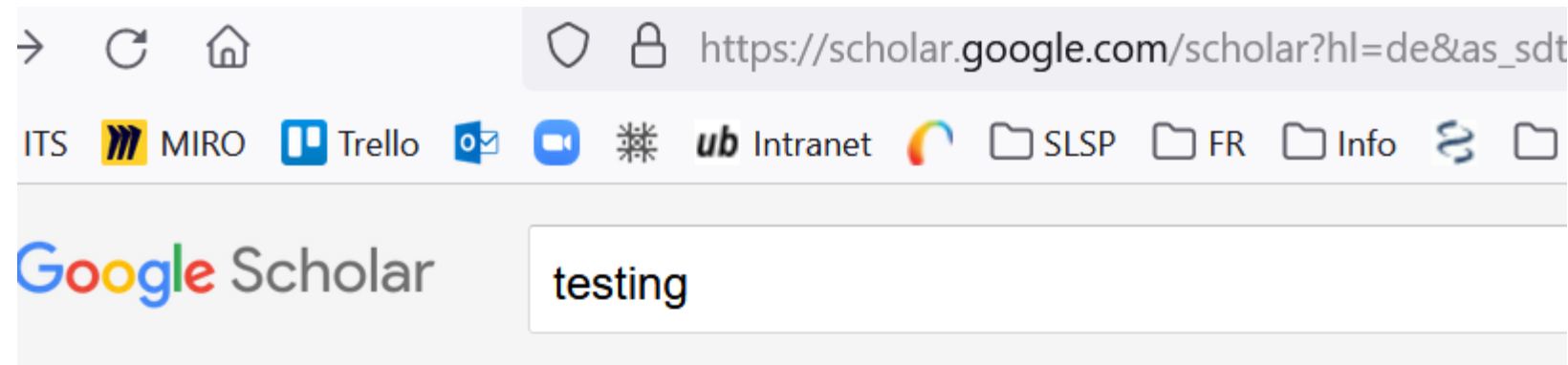
☒ Öffnen mit EndNote 20 (Bld 14672)

☐ Datei speichern

☐ Für Dateien dieses Typs immer diese Aktion ausführen

OK Abbrechen

2. Search and collect references: google scholar



Artikel Ungefähr 6'760'000 Ergebnisse (0.10 Sek.)

Beliebige Zeit

Seit 2022

Seit 2021

Seit 2018

Zeitraum wählen...

Nach Relevanz
sortieren

Nach Datum sortieren

Beliebige Sprache

Seiten auf Deutsch

Model-based **testing** of reactive systems

M Broy, B Jonsson, JP Katoen, M Leucker... - Volume 3472 of

... , a book on **testing** is hardly ever a comprehensive overview

... In this volume, we focus on **testing** methods for reactive systems

☆ Speichern **Zitieren** Zitiert von: 547 Ähnliche Artikel

Dynamic **testing**.

EL Grigorenko, RJ Sternberg - Psychological bulletin, 1998

son, JP Katoen, M Leucker... - Volume 3472 of ..., 2005 - Springer

... and to substitute **testing** that is dynamic

testing procedure underlies our use

☆ Speichern **Zitieren** Zitiert von: 547

Zitieren

MLA Broy, Manfred, et al. "Model-based testing of reactive systems." *Volume 3472 of Springer LNCS*. 2005.

APA Broy, M., Jonsson, B., Katoen, J. P., Leucker, M., & Pretschner, A. (2005). Model-based testing of reactive systems. In *Volume 3472 of Springer LNCS*.

ISO 690 BROY, Manfred, et al. Model-based testing of reactive systems. In: *Volume 3472 of Springer LNCS*. 2005.

BibTeX **EndNote** RefMan RefWorks

2. Search and collect references: with PubMed within EndNote

File Edit References Groups Library Tools Window Help

PubMed (NLM)

Author (Smith, A.B.) Contains tanner

And Year Contains

And Title Contains malaria infants

Clear search Search options Search

Searching PubMed (NLM)

Retrieve results: 25 26

<input type="checkbox"/>	Author	Title	Journal
<input type="checkbox"/>	Otieno, L.;...	Safety and immunogenicity of the ...	Vaccine
<input type="checkbox"/>	Guerra M...	Safety profile of the RTS,S/AS01 ma...	Hum Vacci...
<input type="checkbox"/>	Jongo, S. ...	Safety and Differential Antibody an...	Am J Trop ...
<input type="checkbox"/>	Ajua, A.; L...	The effect of immunization schedul...	Malar J
<input type="checkbox"/>	Abdulla, S...	Randomized, controlled trial of the l...	Malar J

2. Search fields
PubMed

3 Search results
PubMed

4 Select results for your
Endnote Library

1 Search within
PubMed

Searching PubMed (NLM)

Retrieve results: 25 26

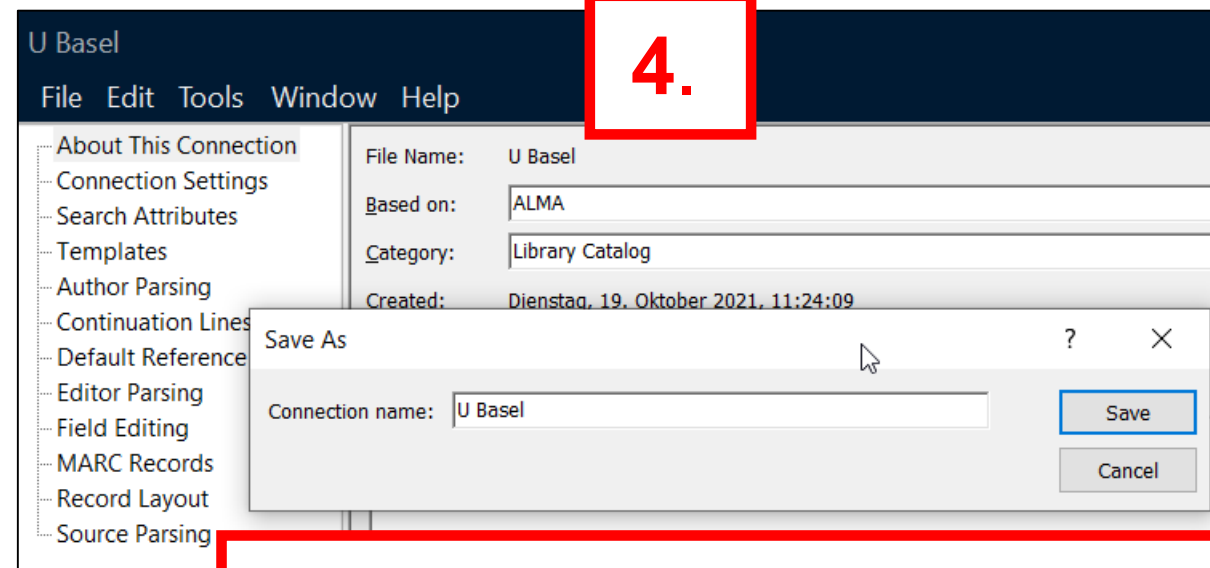
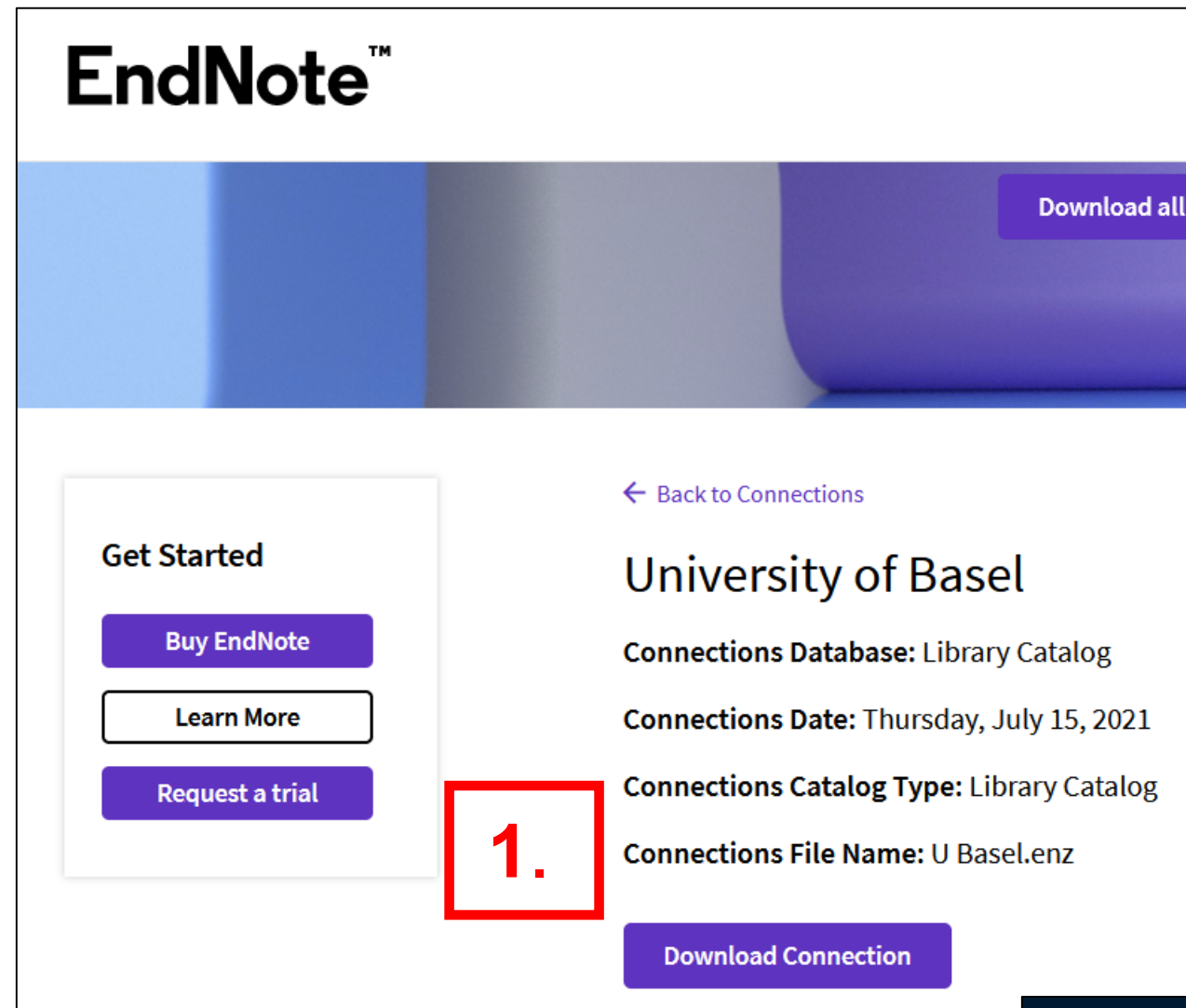
<input type="checkbox"/>	Author	Title	Journal
<input checked="" type="checkbox"/>	Otieno, L.;...	Safety and immunogenicity of the ...	Vaccine
<input checked="" type="checkbox"/>	Guerra M...	Safety profile of the RTS,S/AS01 ma...	Hum Vacci...
<input checked="" type="checkbox"/>	Jongo, S. ...	Safety and Differential Antibody an...	Am J Trop ...

Add the selected online records to your local library

2. Search and collect references: with library catalogue swisscovery within EndNote: Connection File swisscovery Basel

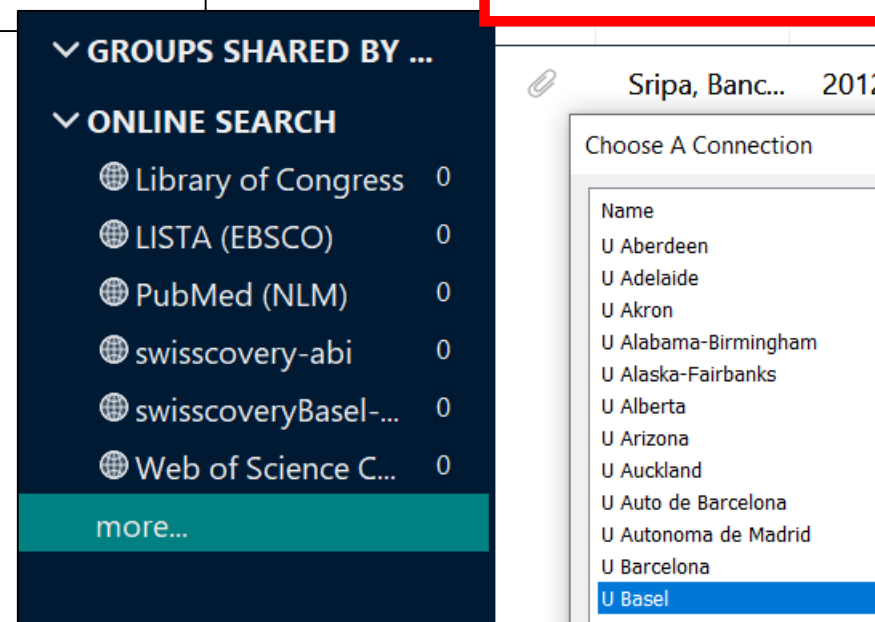
Download Endnote-Connection file for swisscovery Basel:

https://endnote.com/connections_download/university-of-basel/



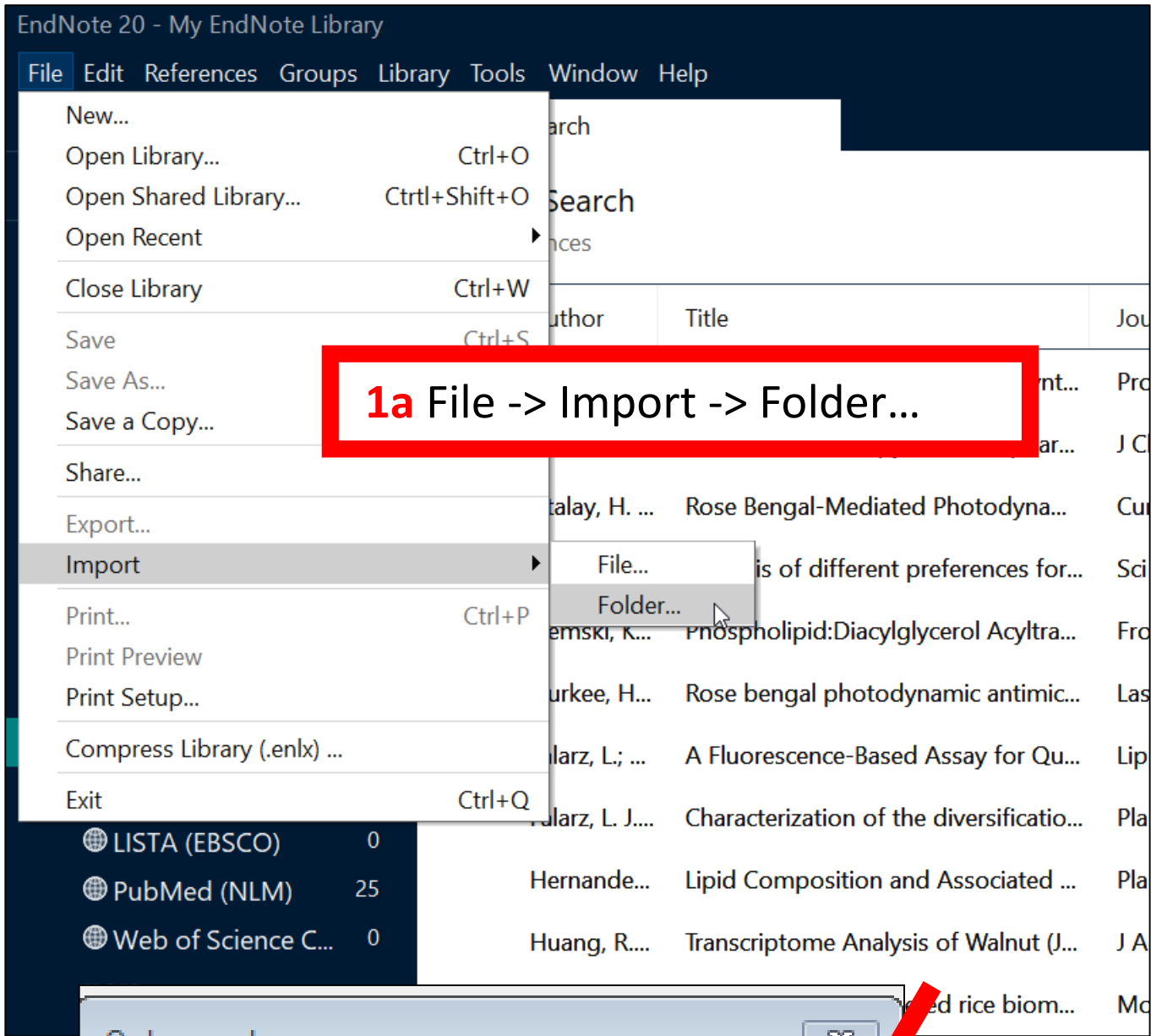
1. «Downolad Connection»
2. Save it on your desktop
3. Double click it on your desktop
4. Save it as...U Basel -> Save (and close the file)

5.

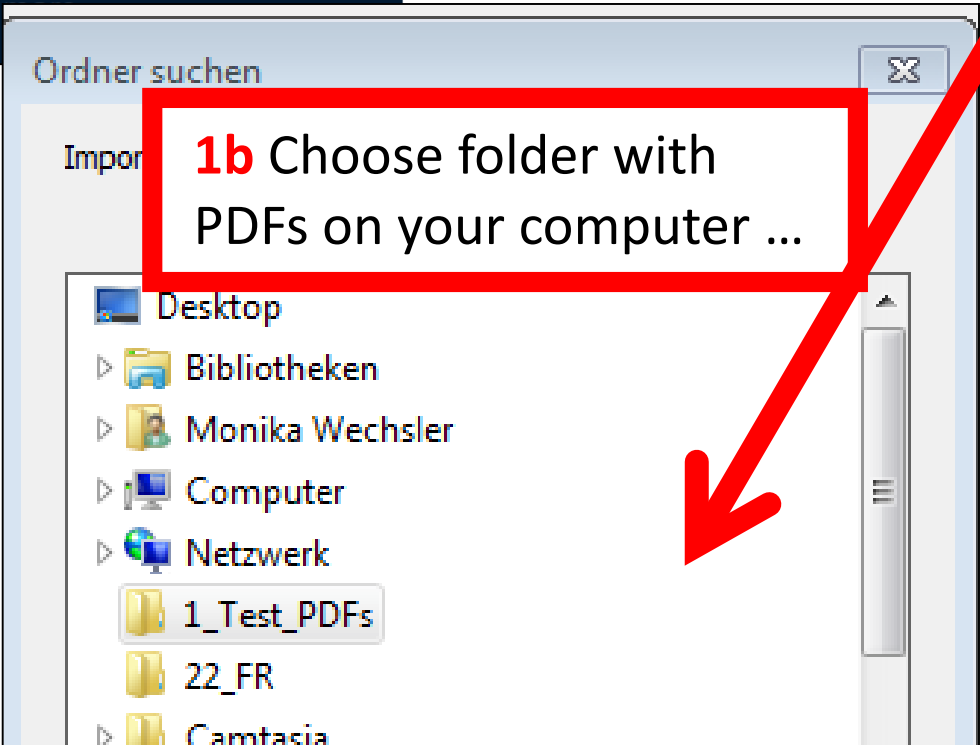


5. Next time when you open Endnote, the file «U Basel» will be available

2. Search and collect references: Create a reference from a PDF



1a File -> Import -> Folder...



1b Choose folder with PDFs on your computer ...

2a

	Author	Title	Journal	Year
	Tam, John...	Research agenda for mass gatherin...	The Lancet ...	2012
	Chan, K.; ...	A Rapid and Low-Cost PCR Thermal...	PLoS One	2016

2b

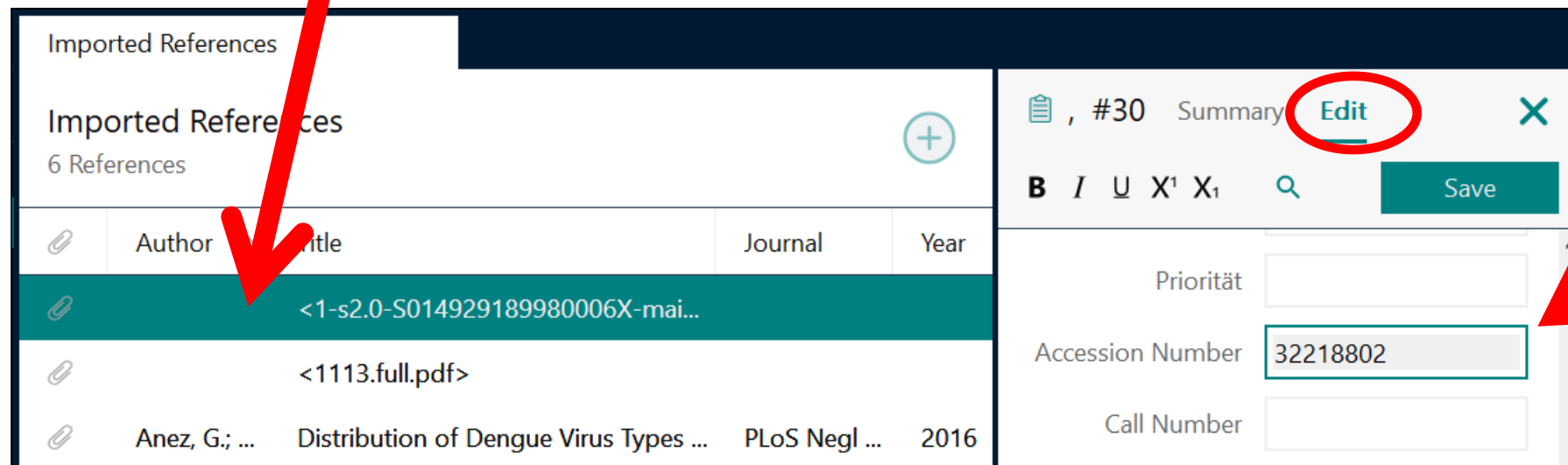
	Author	Title	Journal	Year
		<1-s2.0-S014929189980006X-mai...		
		<1113.full.pdf>		

2a Metadata of the article will be completed automatically in EndNote

2b No metadata available: see next slide

2. Search and collect references: Create a reference from a PDF

1. What to do if metadata of your imported PDF is missing?

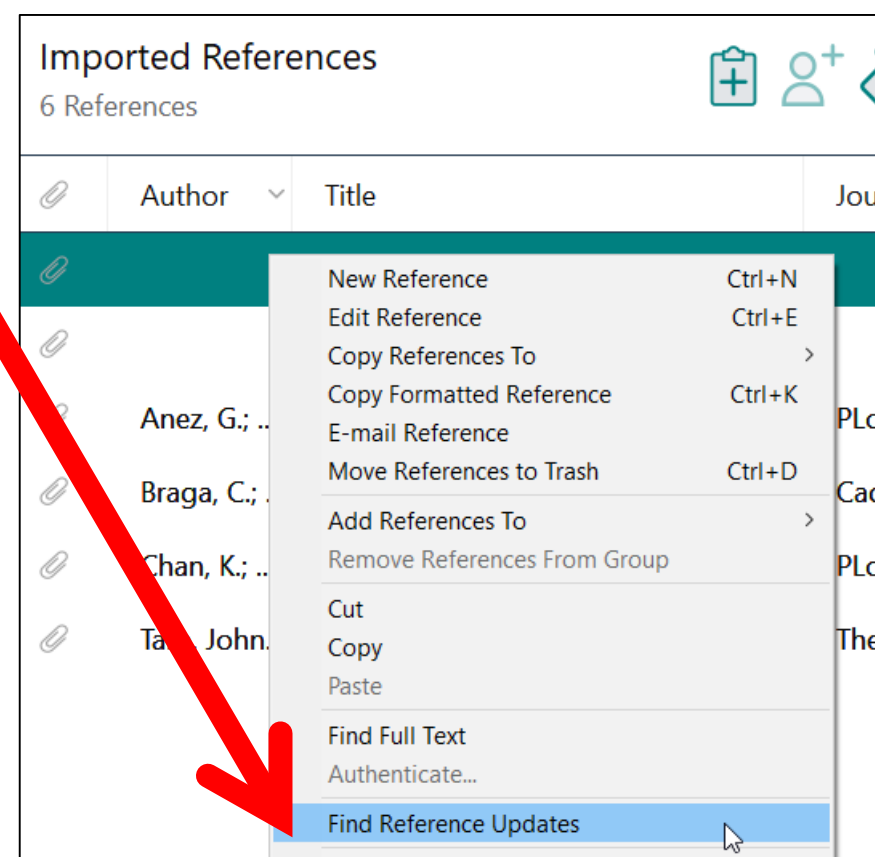


2. If the document has an ID, fill it out in the following field:

- Accession Number: PubMed ID
- PMCID: PumMed Central ID
- DOI
- ISBN...

then save the reference

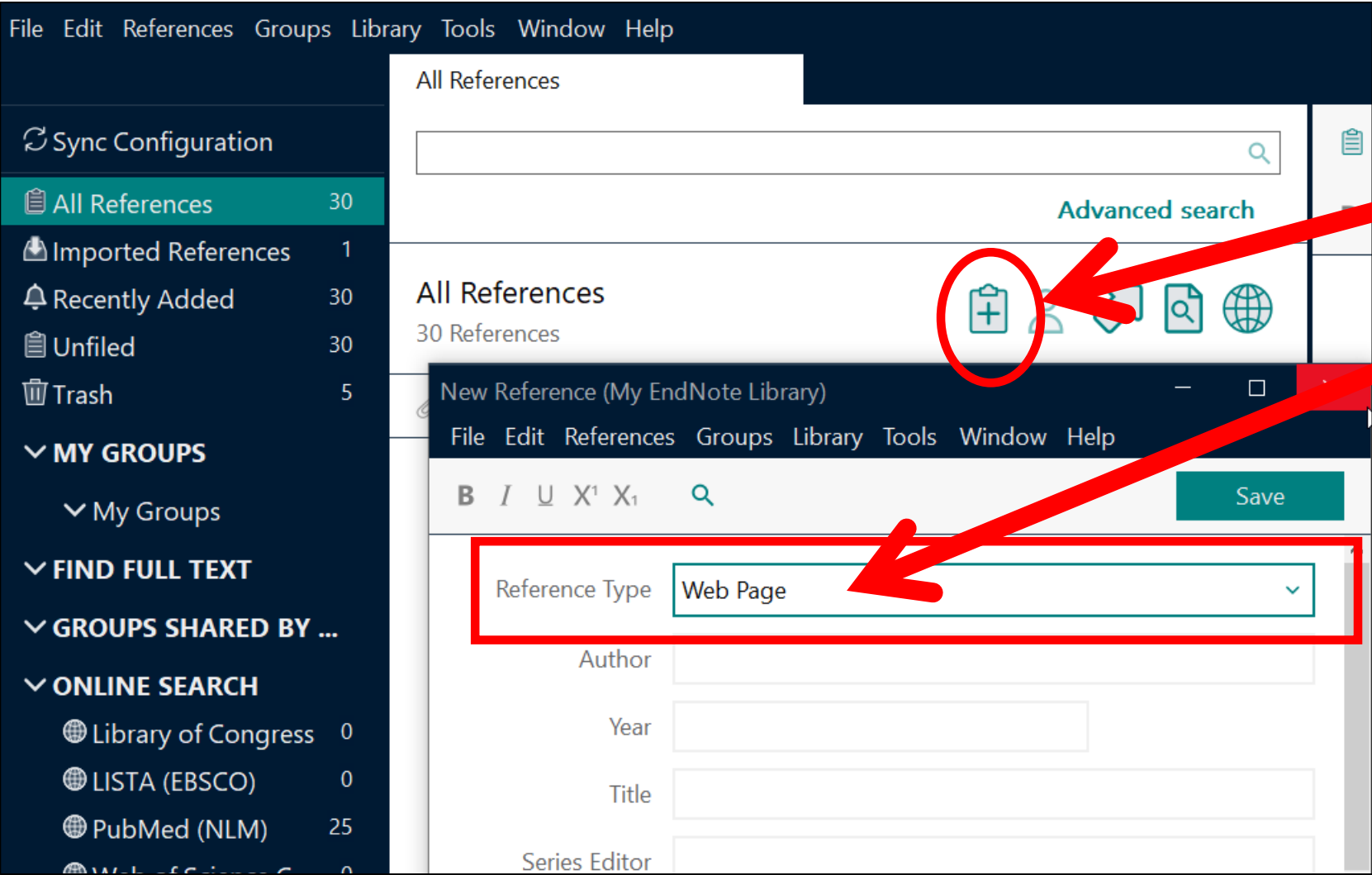
3. Mark the record, right mouse klick: Find Reference Updates



If not possible:

- either delete the record, download the reference from google scholar/PubMed... & attach the PDF from your computer by hand
- Of fill out the missing metadata by hand

2. Search and collect references: Create a reference manually



Create a new reference manually

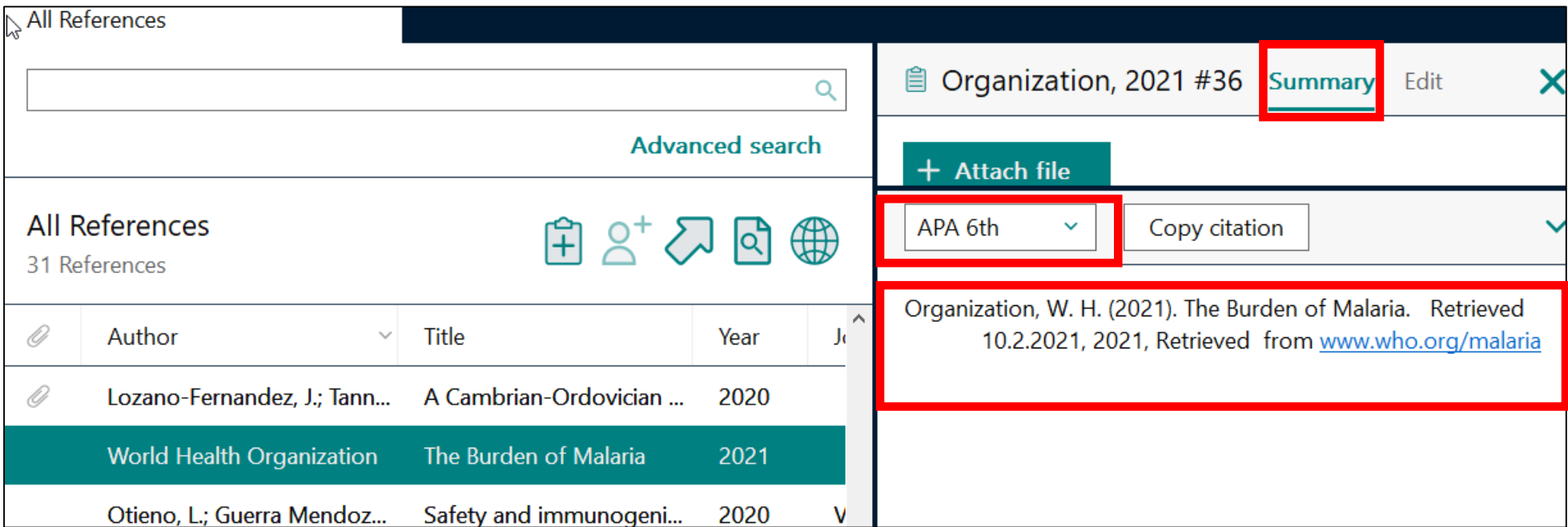
Choose correct reference type

Cataloguing Authors:


Persons:
Family name, first name *or*
Family, V.

Organisations:
Name of the Organisation,

Check always the output:
Summary



3. Insert references into a Word document: View in Word

Go to Endnote: mark wished reference in EndNote, click in Endnote  (or command ALT+2) - > reference will be inserted into Word; alternatively choose *Insert Citation*

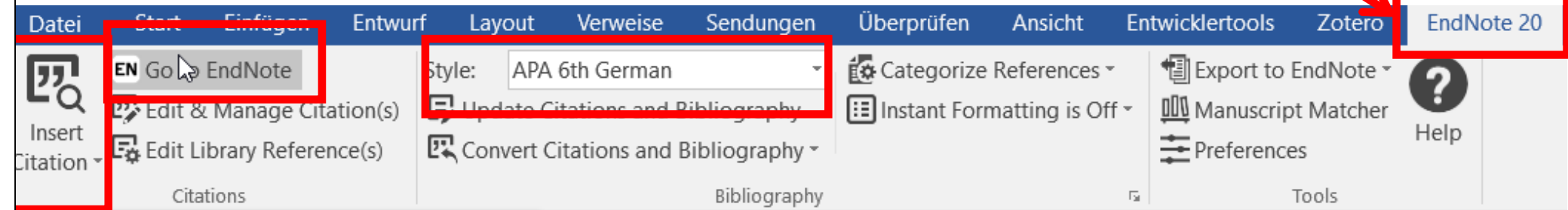
Insert Citation: search with a keyword within your Endnote Library and click on «insert»

Style: Define format of in-text citation and of reference within the bibliography. Suitable for medicine: Vancouver, APA7th

Edit & Manage Citation: Edit text within in-text citation (e.g. insert page numbers; omit author etc)

Convert Citations: *Convert to unformatted Citations:* remove codes temporarily (e.g. for loading faster);
Convert to plain text: remove codes irretrievably.
Warning: Save document previously!

EndNote toolbar of MS Word

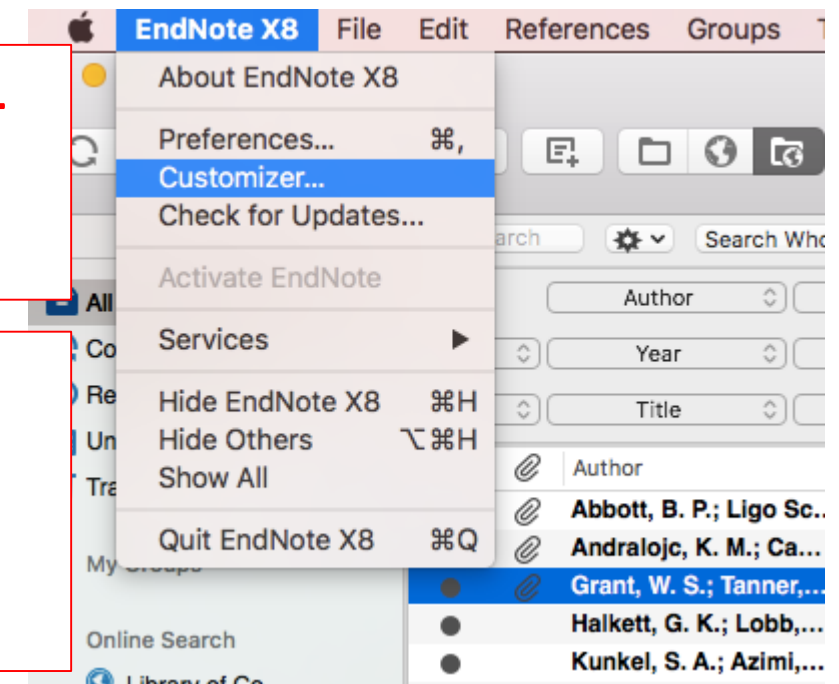


Lorem ipsum dolor sit amet (Agnandji et al., 2010), consectetur adipisicing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua (Mwangoka et al., 2013). Ut enim ad minim veniam (Utzinger & Tanner, 2013), quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident (Abdulla et al., 2008), sunt in culpa qui officia deserunt mollit anim id est laborum.

Abdulla, S., Oberholzer, R., Juma, O., Kubhoja, S., Machera, F., Membi, C., . . . Tanner, M. (2008). Safety and Immunogenicity of RTS,S/AS02D Malaria Vaccine in Infants. *New England Journal of Medicine*, 359(24), 2533-2544. doi: Doi10.1056/Nejmoa0807773
Agnandji, S. T., Asante, K. P., Lyimo, J., Vekemans, J., Soulanoudjingar, S. S., Owusu, R., . . . Abdulla, S. (2010). Evaluation of the Safety and Immunogenicity of the RTS,S/AS01(E) Malaria

Mac: if EndNote toolbar is missing: EndNote - > Customizer ... -> Cite While You Write addin ...

Mac / Mojave: System Preferences -> Security & Privacy -> Privacy -> Automation options: make sure that both "Microsoft Word" and "EndNote " are both turned on.



3. Insert references into a Word document: format the bibliography

The screenshot shows the Microsoft Word interface with the EndNote X8 ribbon active. The ribbon includes tabs for Citations, Bibliography, and Tools. The 'Edit & Manage Citation(s)' button in the Citations tab is circled in red, with a red arrow pointing to the 'Tools' dropdown menu in the Bibliography tab, which is also circled in red. The 'Tools' menu is open, showing options: 'Update Citations and Bibliography', 'Configure Bibliography' (circled in red), and 'Export Traveling Library'.

The 'EndNote X8 Edit & Manage Citations' dialog box is open, displaying a table with the following data:

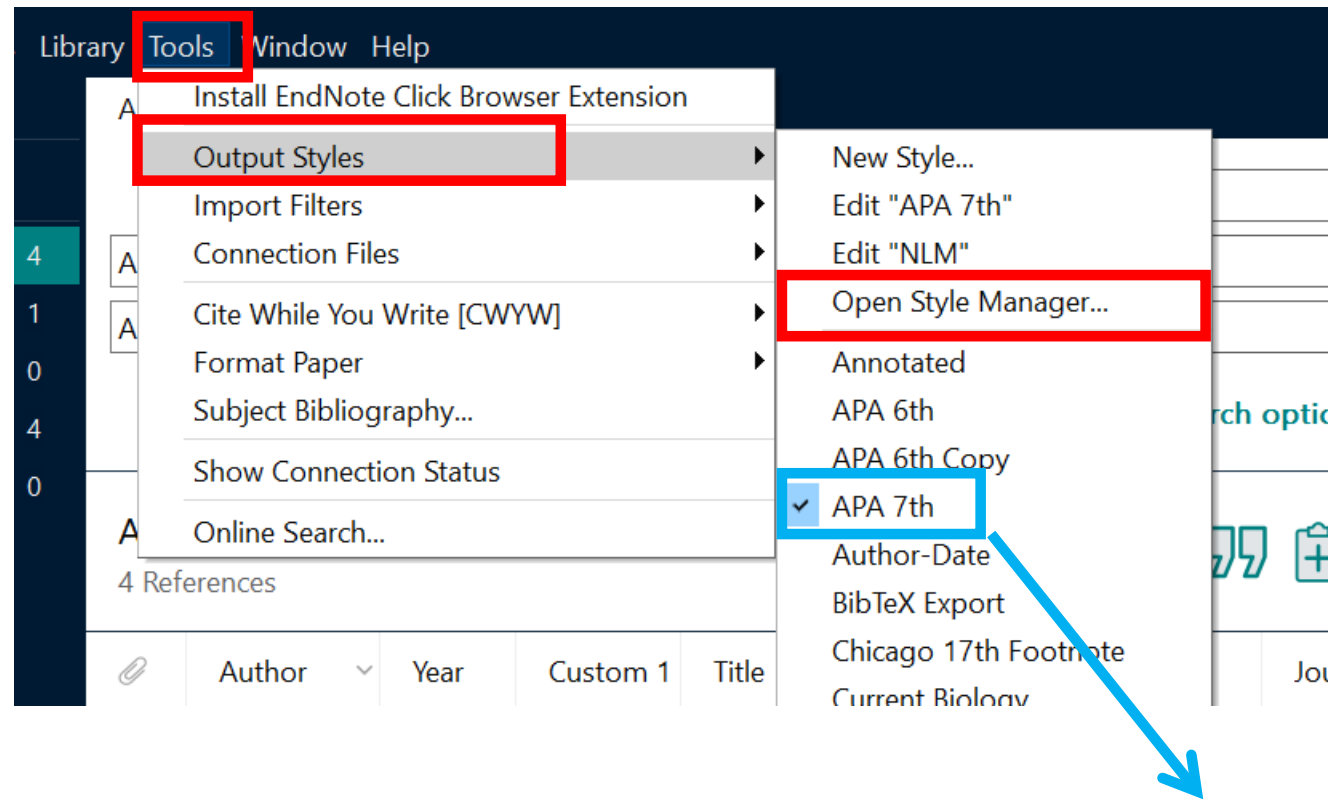
Citation	Count	Library
(Romore et al., 2016)		
↑ ↓ Romore, 2016 #8	1	My EndNote Library

The 'EndNote X8 Configure Bibliography' dialog box is also open, showing the 'Format Bibliography' tab. The settings are as follows:

- Font: Calibri, Size: 11
- Bibliography title: (empty field)
- Start with bibliography number: 1
- First line indent: 0.000 cm, Line spacing: Single
- Hanging indent: 1.270 cm, Space after: None

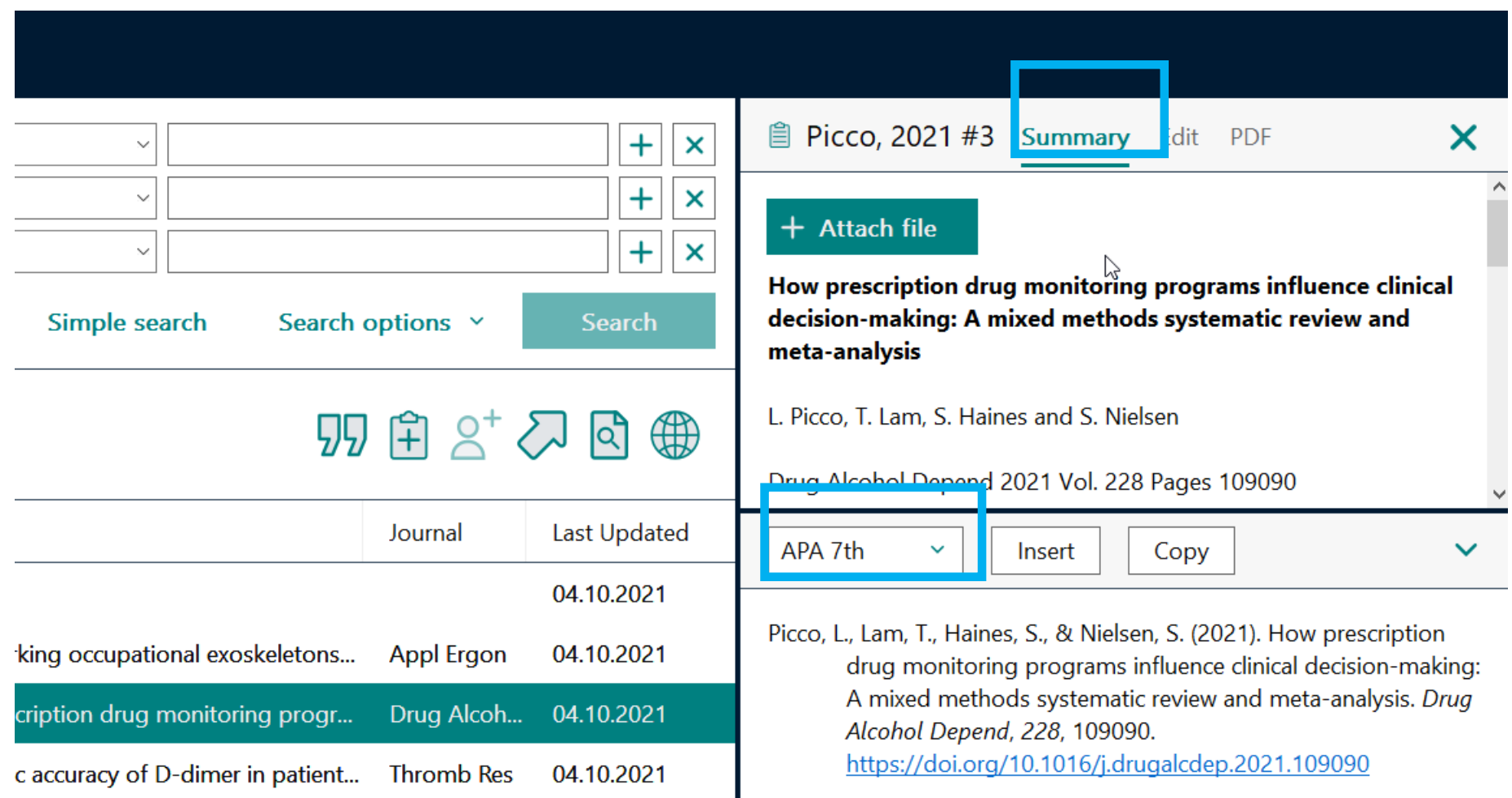
The 'OK' button is highlighted in blue.

3. Insert references into a Word document: further citation styles, edit styles



EndNote -> Tools -> Output Styles -> **Open Style Manager...**:

- Define styles to be presented in Word
- Download missing styles («Get more on the Web»: > 6000)
- Edit a style («Edit») (see help -> modifying style templates)

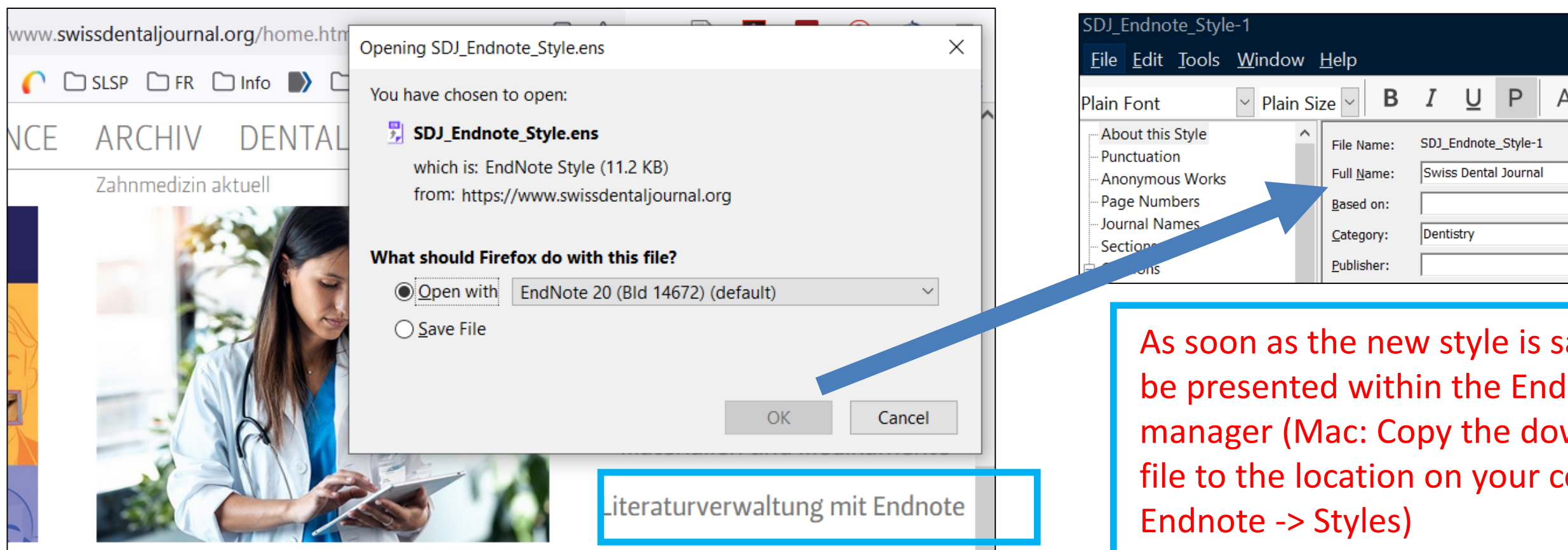


3. Insert references into a Word document: Import a missing style

A: Import a style from the Endnote platform



B: Import a style from the publishers platform: e.g Swiss Dental Journal



As soon as the new style is saved it will be presented within the Endnote style manager (Mac: Copy the downloaded file to the location on your computer for Endnote -> Styles)

4. Manage references in EndNote: Groups and Groupsets

My EndNote Library

File Edit References Groups Library Tools Window Help

Sync Configuration

All References 11

Dokument1 1

Recently Added 8

Unfiled

Trash

MY GROUPS

▼ Chapters

Introduction 4

Methodology 1

▼ Noch lesen

1. Prio 1

2. Prio 3

All References

Author

And ▼ Year ▼ Contains ▼

And ▼ Title ▼ Contains ▼

Simple search Search options ▼

11 References

	Author	Year	Custom 1	Title	Journal
	Beavis, A.; ...	2021		Treatment of vulvar and vaginal dysplasia...	Int J Gynec...
	Bhadury, ...	2021		Detection of Volatiles from Raw Beef Mea...	Foods
	Burel, J. G.;...	2021		Distinct blood transcriptomic signature o...	Tuberculosi...
	Campbell, ...	2021		Photoinduced Covalent Irreversible Inacti...	ACS Chem ...

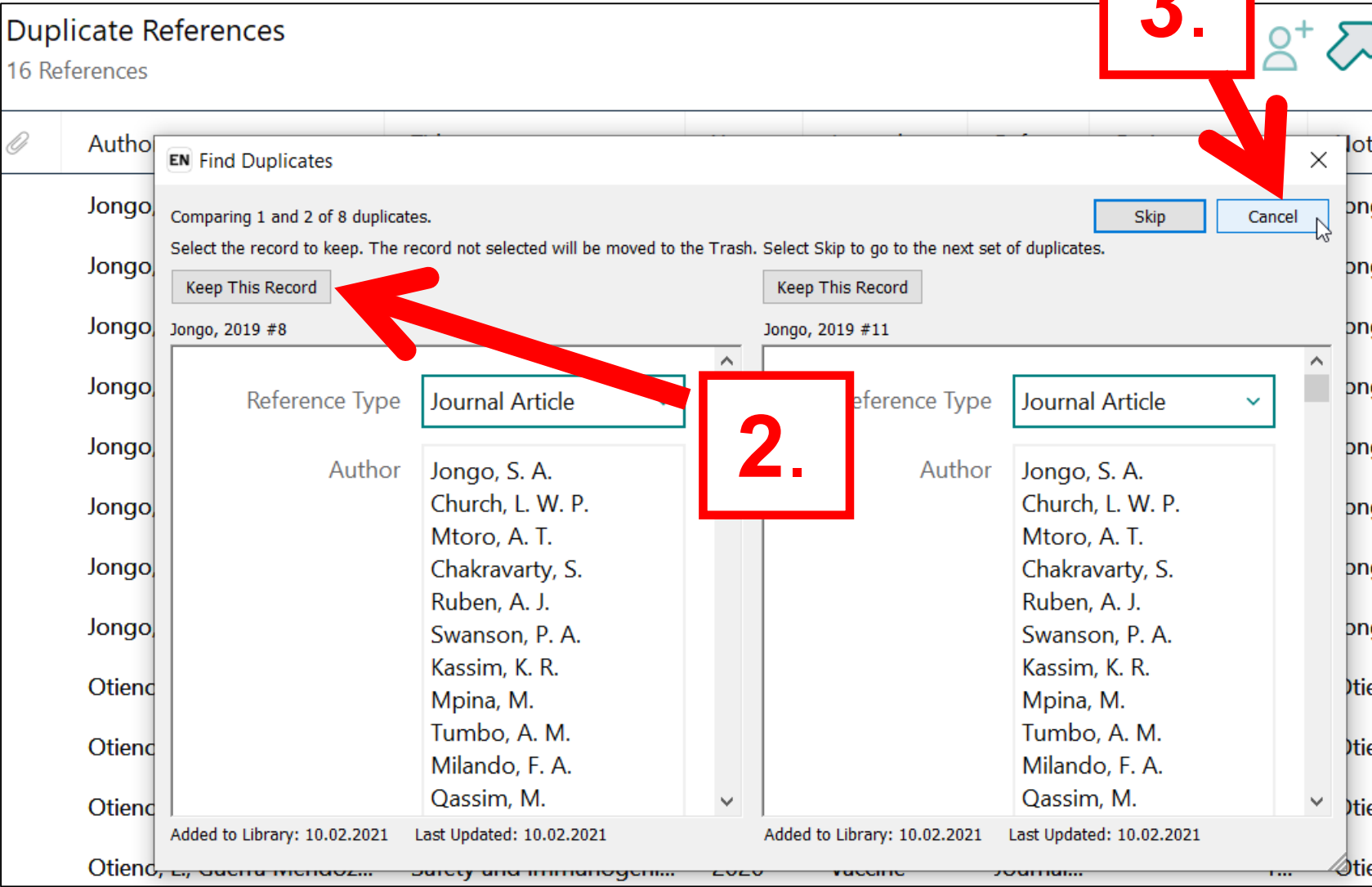
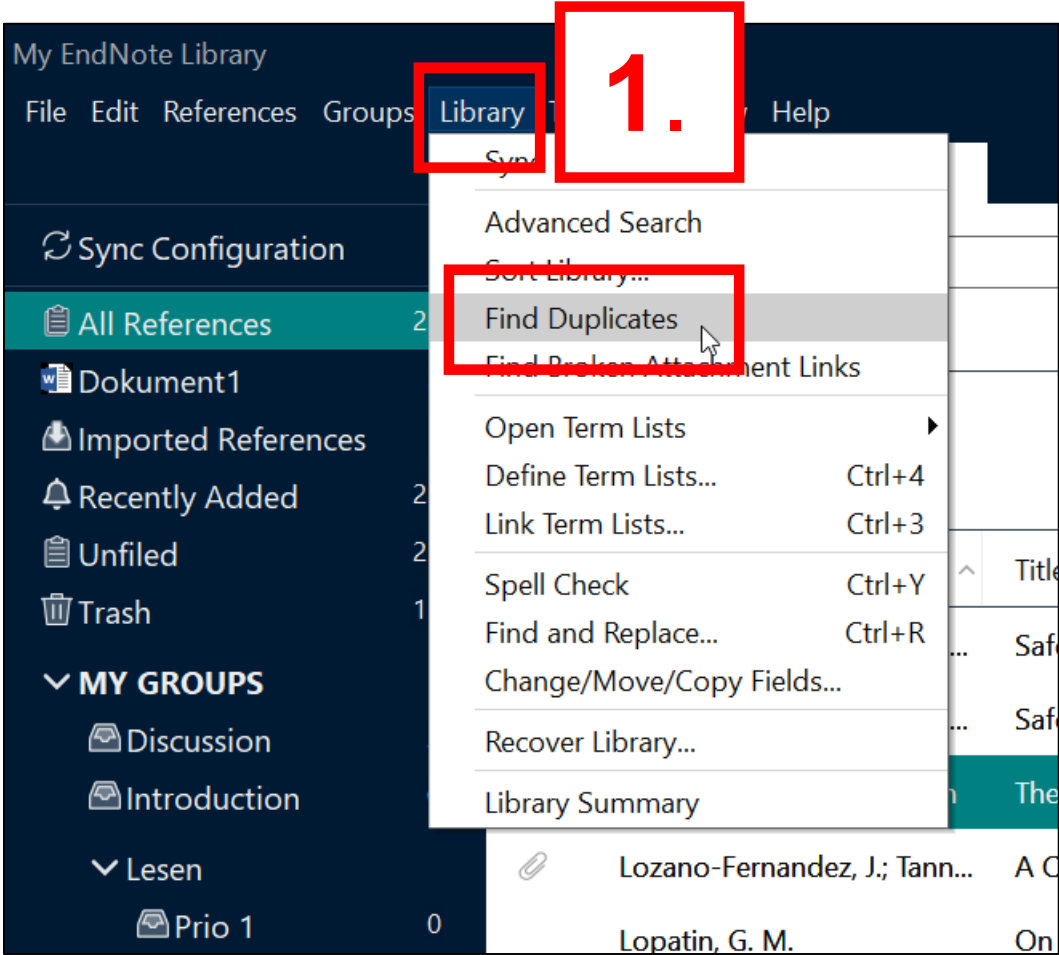
Move references to different groups (Drag & Drop or via menu «Groups»)

Group Set = Header of several groups

Introduction = a Group

Noch lesen = a Groupset

4. Manage references in EndNote: find and remove duplicates



- 1- Menu *Library* -> *Find Duplicates*
- 2- Duplicates will be shown and can be deleted individually
- 3- If you cancel this process...
- 4. ...all duplicates will be highlighted and can be moved to different groups/to the trash

A screenshot of the 'Duplicate References' table in EndNote. The table has 5 references. The first three references are highlighted in green, indicating they are duplicates. The last two references are not highlighted. A red box with a red '4.' is in the top right corner of the table.

	Author	Title	Year	Journal
1	Jongo, S. A.; Church, L. W. ...	Safety and Differential A...	2019	Am J Trop ...
5	Jongo, S. A.; Church, L. W. ...	Safety and Differential A...	2019	Am J Trop ...
12	Jongo, S. A.; Church, L. W. ...	Safety and Differential A...	2019	Am J Trop ...
10	Otieno, L.; Guerra Mendoz...	Safety and immunogeni...	2020	Vaccine
24	Otieno, L.; Guerra Mendoz...	Safety and immunogeni...	2020	Vaccine

4. Manage references in EndNote: search fulltexts/PDFs automatically

The screenshot shows the EndNote software interface. At the top, there is a menu bar with 'Groups', 'Library', 'Tools', 'Window', and 'Help'. Below the menu bar, there is a search bar with the text 'All References' and a plus sign. The search bar contains three criteria: 'Author' (Contains 'tanner'), 'Year' (Contains), and 'Title' (Contains). Below the search bar, there are buttons for 'Simple search', 'Search options', and 'Search'. Below the search bar, there is a section titled 'All References' with '11 References'. To the right of this section, there is a toolbar with icons for 'Search the Web', 'Add', 'Remove', 'Export', and 'Import'. A red circle highlights the 'Search the Web' icon. A red arrow points from a text box to this icon.

Search the Web for full text documents for the selected references

	Author	Year	Custom 1	Title	Journal	Last Upd
	Beavis, A.; ...	2021		Treatment of vulvar and vaginal dysplasia...	Int J Gynec...	8.10.20
	Bhadury, ...	2021		Detection of Volatiles from Raw Beef Mea		
	Burel, J. G.;...	2021		Distinct blood transcriptomic signature o		
	Campbell, ...	2021		Photoinduced Covalent Irreversible Inacti		

Let EndNote search for PDFs of your imported references, automatically:
Highlight references ->
«Search the Web for full text documents for the selected references»

Field Open URL PATH:

https://basel.swisscovery.org/view/uresolver/41SLSP_UBS/openurl?

The image shows the 'EndNote Preferences' dialog box. The 'Find Full Text' option in the left sidebar is highlighted with a red circle. The 'OpenURL Path' field is highlighted with a red rectangle and contains the URL https://basel.swisscovery.org/view/uresolver/41SLSP_UBS/openurl?. Other options like 'Web of Science Full Text Links', 'DOI (Digital Object Identifier)', 'PubMed LinkOut (U.S. National Library of Medicine)', and 'OpenURL' are checked. The 'Authenticate with:' section has an empty 'URL:' field. Examples of URLs are provided below. The 'Automatically invoke Find Full Text on newly-imported references' checkbox is unchecked. The bottom of the dialog has buttons for 'EndNote Defaults', 'Revert Panel', 'OK', 'Abbrechen', and 'Übernehmen'.

EndNote Preferences

Change Case
Display Fields
Display Font
Duplicates
Find Full Text
Folder Locations
Formatting
Libraries
PDF Handling
Read / Unread
Reference Types
Sorting
Spell Check
Sync
Temporary Citations
Term Lists
URLs & Links

The Find Full Text feature uses several technologies to maximize the chances that EndNote will find all available PDFs. Use this screen to control these full text search options:

☒ Web of Science Full Text Links
☒ DOI (Digital Object Identifier)
☒ PubMed LinkOut (U.S. National Library of Medicine)
☒ OpenURL

OpenURL Path: https://basel.swisscovery.org/view/uresolver/41SLSP_UBS/openurl?

Authenticate with:

URL:

Examples: <https://login.ezproxy.library.myuniversity.edu/login>
<http://auth.universityname.edu/authentication>

☐ Automatically invoke Find Full Text on newly-imported references

EndNote Defaults Revert Panel OK Abbrechen Übernehmen

4. Manage references in EndNote: PDF handling

The screenshot shows the EndNote interface. On the left, a table titled 'All References' lists 12 references. The first three rows are visible:

	Author	Year	Journal	Ref
	Adjuik, B. M.	1944	Ind Med Gaz	Jou
	Goodman, Kenneth W.	2015	Ethics, medicine, and inf...	Boc
	Jongo, S. A.; Church, L. W. ...	2019	Am J Trop ...	Jou

On the right, the 'File Attachments' section shows a dropdown menu with 'Jongo-2...' and a '+ Attach file' button. A red box highlights the text 'EndNote has found 2 PDFs' above the dropdown.

The downloaded PDFs can be found in field «File Attachments» (and are stored on your computer in the . DATA folder)

Menu *Edit* -> *Preferences*:

- Define how PDFs are named
- Enable automatic importing: Every stored PDF in this folder will be imported to EndNote automatically
- All PDFs within EndNote are stored in a folder .DATA (see chapter 1 «Getting started: Create an EndNote Library»)

The screenshot shows the 'EndNote Preferences' dialog box. The 'PDF Handling' section is selected in the left sidebar. The 'PDF Auto Renaming Options' section has the following options:

- ☐ Don't Rename
- ☒ Author + Year + Title
- ☐ Author + Title
- ☐ Author + Year
- ☐ Title
- ☐ Custom

The 'PDF Auto Import Folder' section has the following options:

- ☒ Enable automatic importing
- h:\ub-home\$\wechsler\Desktop\PDFs lesen
- Select Folder

At the bottom, there are buttons for 'EndNote Defaults', 'Revert Panel', 'OK', 'Abbrechen', and 'Übernehmen'.

4. Manage references in EndNote: attach fulltexts / PDFs manually

1.

PDFs not found by EndNote must be searched for individually -> download them to your computer

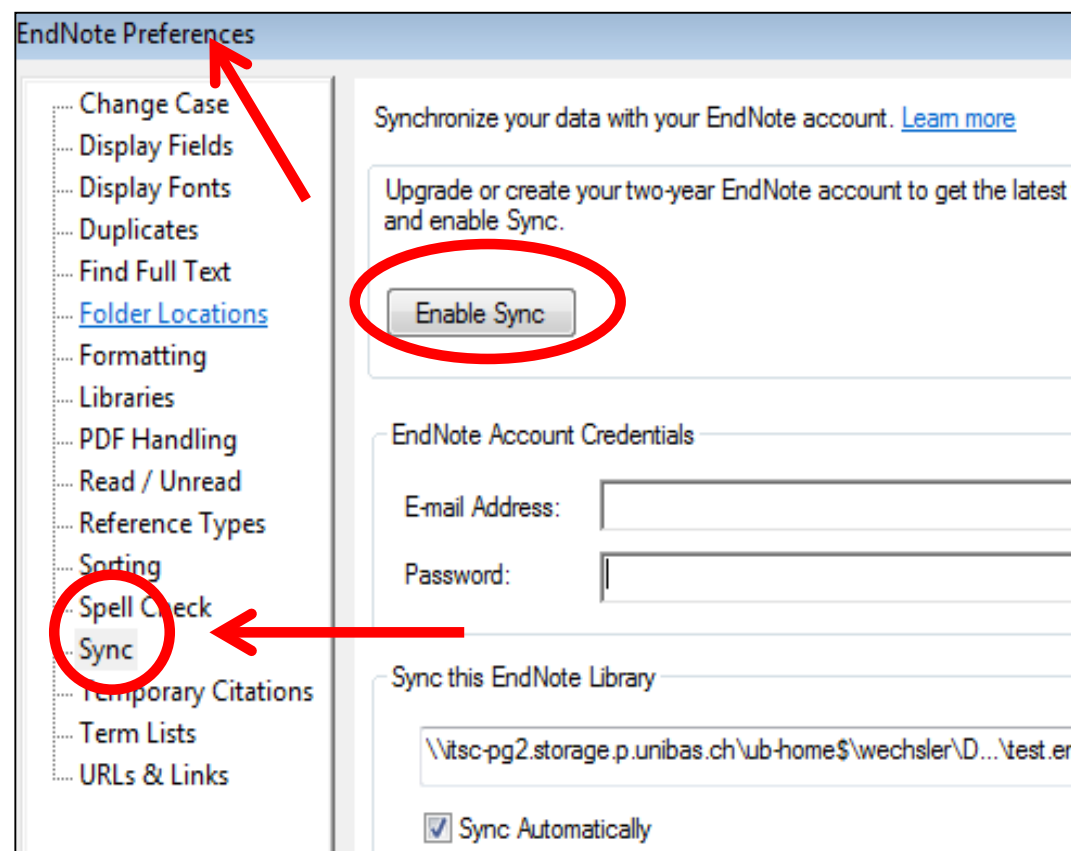
2.

Drag & Drop the PDF to the corresponding reference.
PDF on desktop may be deleted. All PDFs within EndNote are stored in the .DATA folder.

The screenshot shows the EndNote application window titled 'My EndNote Library'. The left sidebar contains a list of reference groups: 'All References' (13), 'Dokument1' (1), 'Duplicate References' (5), 'Imported References' (1), 'Recently Added' (13), 'Unfiled' (11), 'Trash' (24), and 'MY GROUPS' (Discussion: 2, Introduction: 0, Lesen: 0, Prio 1: 0). The main pane displays the 'All References' list with 13 references. A red arrow points from a PDF file named 'artikel_vonHandan...' on the desktop to the 'All References' list, illustrating the manual attachment process.

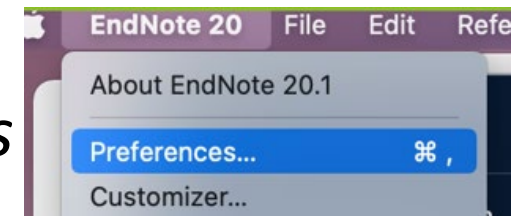
	Author	Title	Year	Journal
	Adhicary, B. M.	Malaria in Infants	1944	Ind M
	Goodman, Kenneth W.	Ethics, medicine, and	2015	
	Jongo, S. A.; Church, L. W. ...	Safety and Differential A...	2019	Am J Trop ...
	Jongo, S. A.; Church, L. W. ...	Safety and Differential A...	2019	Am J Trop ...
	Jongo, S. A.; Church, L. W. ...	Safety and Differential A...	2019	Am J Trop ...

5. Web account and collaboration: register and synchronize



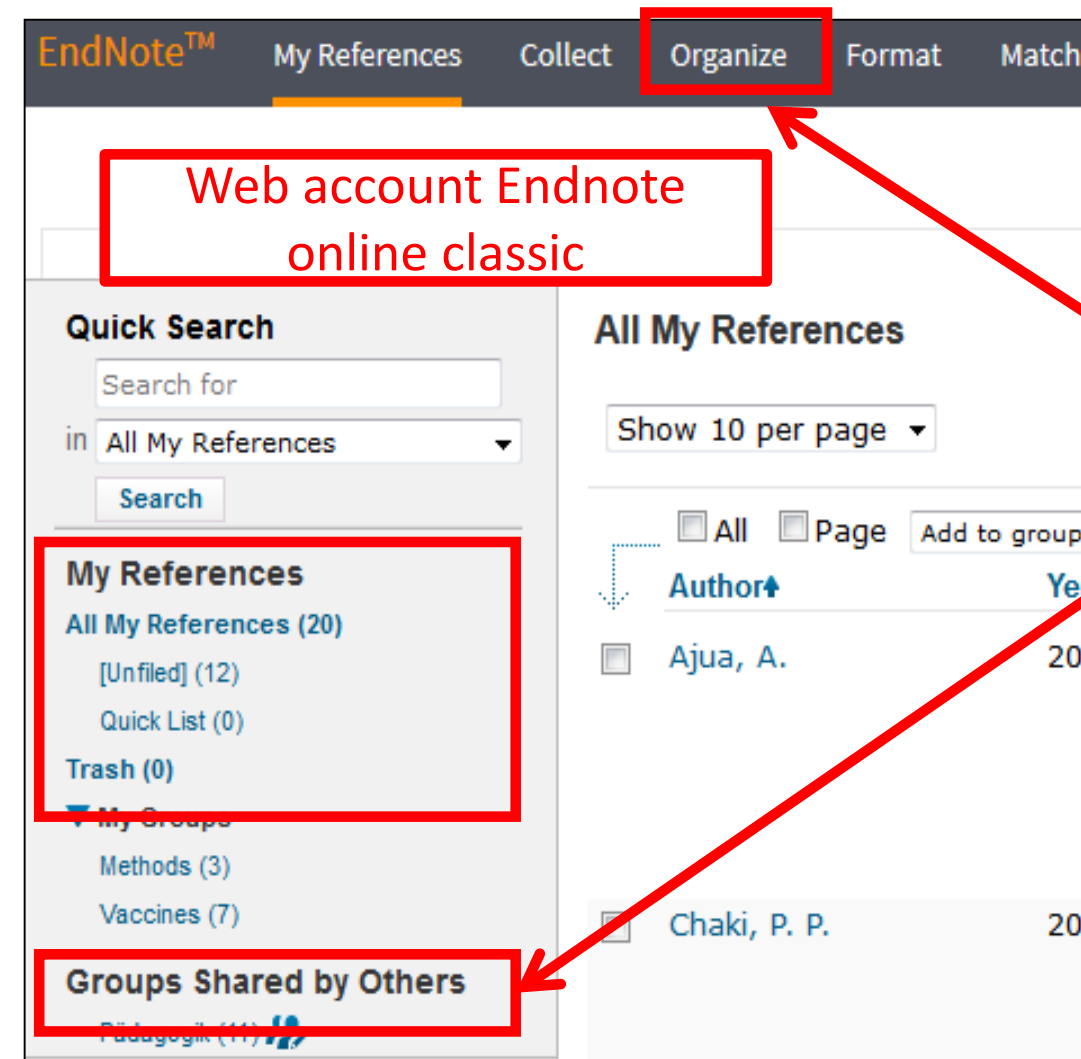
- The web account of EndNote (= «EndNote Online Classic») is free of charge, even without purchasing EndNote desktop. Register: endnote.com -> Login
- Recommended: if EndNote desktop has been purchased, do not register on endnote.com but within EndNote desktop:
Menu *Edit* -> *Preferences* -> *Sync...* -> *Enable Sync* -> *Sign up*

(Mac: Menu *EndNote* -> *Preferences*



- Main functions can also be carried out using the web account (import references; add references to a Word text a.o.)
- The web account allows sharing references (not PDFs) among each other -> *Organize*).

- Synchronize references via EndNote desktop: Menu *Library* -> *Sync*



5. Web account: Menu downloads -> Install needed software

The screenshot shows the EndNote web interface. The 'Downloads' menu is circled in red. Below it, the 'Download Installers' section is visible. The 'Capture Reference' button is highlighted with a red box and an arrow pointing to it. A red box contains text explaining that this tool is needed to import references from PubMed and other databases into the web account.

Download Installers

Capture: Capture Reference

To install the Capture tool, just drag the **Capture Reference** button to your browser's toolbar. In some browsers, you may need to right-click and select "Add to toolbar". To use it, browse to a page you like and click the **Capture Reference** button. Follow the instructions in the window.

Cite While You Write™

Use the EndNote plug-in to insert references, and format citations and bibliographies automatically while you write your papers in Word. This plug-in also allows you to save online references to your library in Internet Explorer for Windows.

U.S. Patent 8,082,241

See [Installation Instructions](#) and [System Requirements](#).

[Download Windows with Internet Explorer plug-in](#)
[Download Windows MSI for mass program installation](#)
[Download Macintosh](#)

Download «Cite While you Write»
Needed to insert references into a Word text

The screenshot shows the EndNote X8 software interface. The 'Preferences' button is highlighted with a red box. The 'EndNote X8 Cite While You Write Preferences' dialog box is open, showing the 'Application' tab. The 'Select the Cite While You Write application' dropdown menu is set to 'EndNote online'. A red box contains text explaining that this is needed to insert references from the web account into the Word text and that the user should change the plugin within Word as well.

Firefox

enlayout Verweise Sendungen Überprüfen Ansicht Entwicklertools Zotero **EndNote X8** Acrobat Citavi

Use the Style: APA 6th Categorize References Export to EndNote Update Citations and Bibliography Instant Formatting is Off Preferences Convert Citations and Bibliography Help

Bibliography Tools

EndNote X8 Cite While You Write Preferences

General Keyboard Figures and Tables **Application**

Select the Cite While You Write application

EndNote
EndNote
EndNote online

Address: monika.wechsler@unibas.ch

word:

OK Abbrechen Hilfe

laborum et dolorum fuga. Et harum tempore, cum soluta nobis est eliger placeat facere possimus, omnis voluptas assumenda est, omnis dolor repellendus. Temporibus

To insert references from the web account into the Word text: change plugin within Word as well:
Word toolbar of EndNote -> Preferences -> Application -> EndNote online

5. Web account: Import references from PubMed (and other databases)

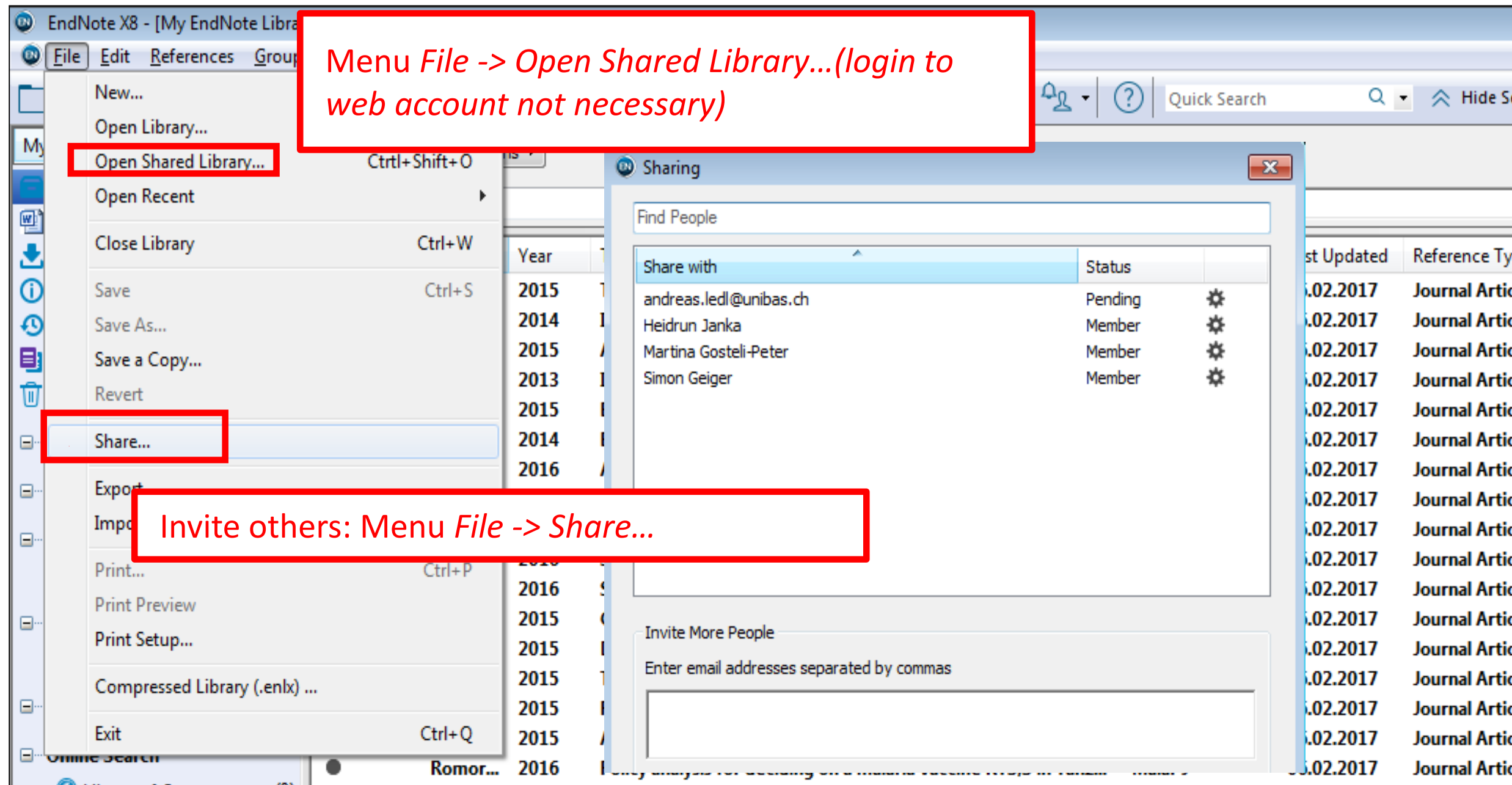
The screenshot shows the PubMed website interface. The search results for 'malaria vaccine' are displayed, showing items 1 to 20 of 7463. The results list includes:

- 1. [RTS,S: Toward a first landmark on malaria vaccine](#). Kaslow DC, Biernaux S. *Vaccine*. 2015 Dec 22;33(52):7425-32. PMID: 26431982 **Free Article** [Similar articles](#)
- 2. [Implications of the licensure of a new generation vaccines](#). Fowkes FJ, Simpson JA, Beeson J. *BMC Med*. 2013 Oct 30;11:232. doi: 10.1186/1745-6215-11-232. PMID: 24228861 **Free PMC Article** [Similar articles](#)
- 3. [Designing malaria vaccines to combat drug resistance](#). Ouattara A, Barry AE, Dutta S, Rea R. *Vaccine*. 2015 Dec 22;33(52):7506-12. doi: 10.1016/j.vaccine.2015.09.110. Review. PMID: 26475447 **Free PMC Article** [Similar articles](#)
- 4. [Stakeholders' opinions and questions regarding the anticipated malaria vaccine in Tanzania](#). Mtenga S, Kimweri A, Romore I, Ali A, Exavery A, Sicuri E, Tanner M, Abdulla S, Lusingu J, Kafuruki S. *Malar J*. 2016 Apr 5;15:189. doi: 10.1186/s12936-016-1209-6. PMID: 27048260 **Free PMC Article** [Similar articles](#)

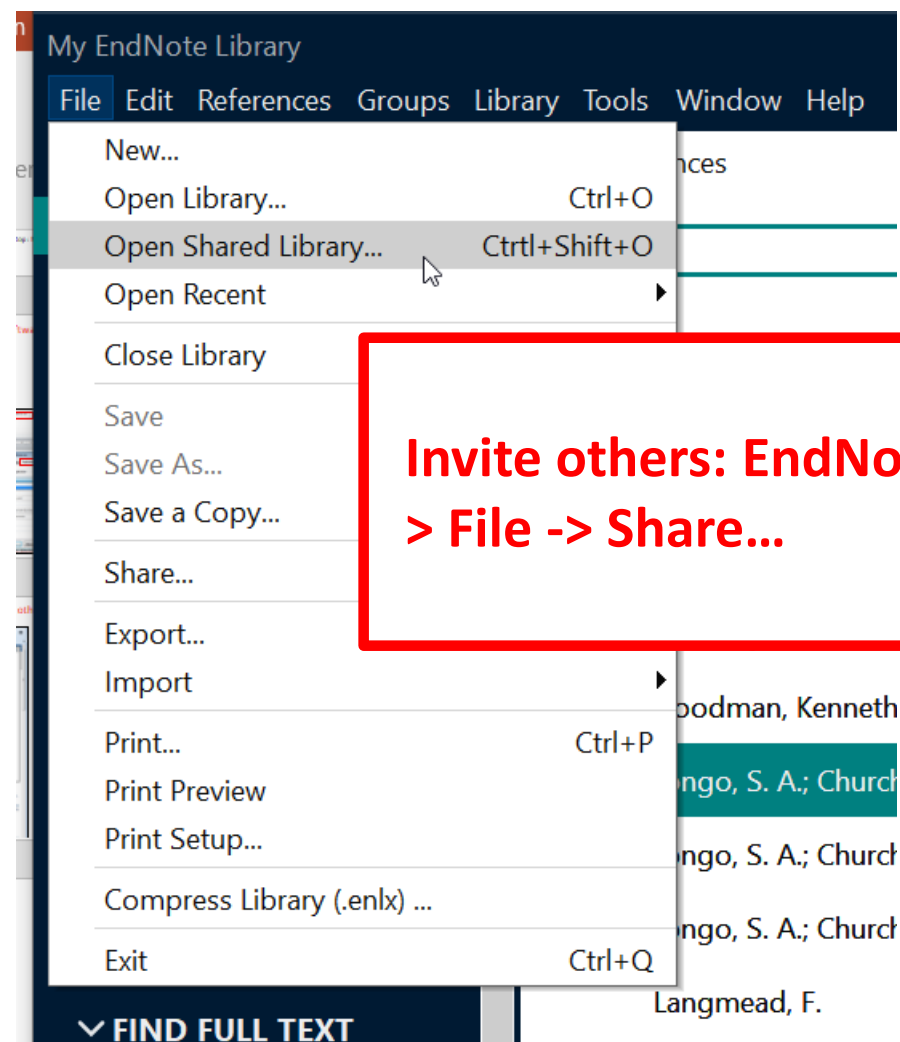
The 'Capture New References' dialog box is open, showing options to capture references to 'my.endnote.com' or 'EndNote'. The 'Groups' section includes 'Methods', 'Vaccines', and 'New Group'. The 'Capture' button is highlighted.

At the bottom right, there is a 'Find related data' section with a 'Database' dropdown menu and a 'Find items' button.

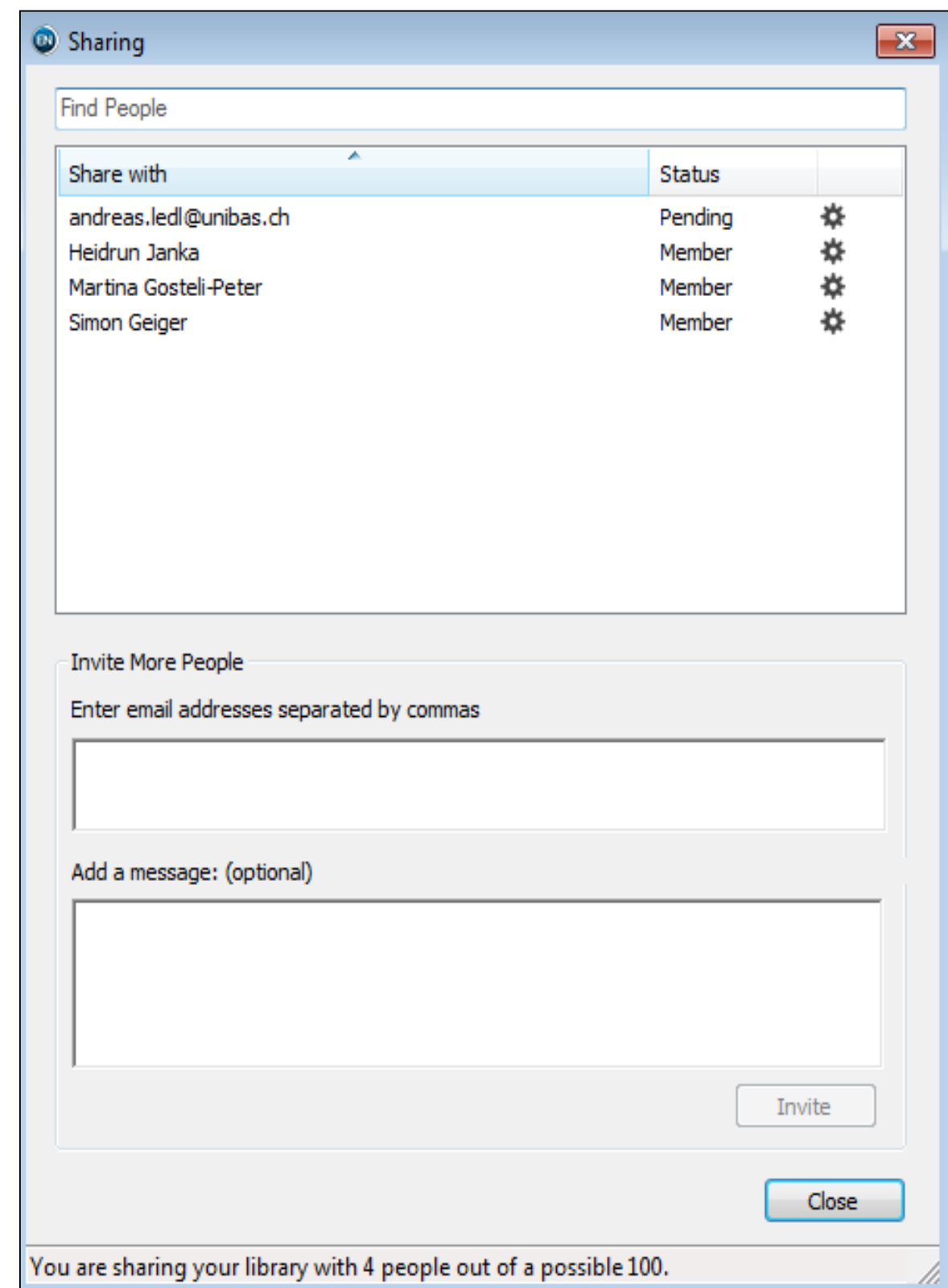
6. Sharing Libraries



- Version X7.2 and higher
- Share references **incl. PDFs**; PDFs may be annotated
- 100 persons per library
- Unlimited storage
- Only 1 library may be shared with others!
- All participants have same rights (add, edit, delete references, annotate PDFs ...)
- Web account is a condition to share but is not necessary to open.



**Invite others: EndNote Desktop -
> File -> Share...**



7. FAQs

Using EndNote with Google Docs

- There is no EndNote Cite While You Write tool available for Google Docs (some other citation managers will work with Google Docs).
- However it is still possible to use EndNote with Google Docs by inserting unformatted citations, saving it as an RTF file and then formatting the document using EndNote
- See LibGuide with screenshots of James Cook University Australia:
<https://libguides.jcu.edu.au/endnote/google-docs>

Insert a bibliography list after each chapter

- From the EndNote Library: Modify the style in the style menu -> Choose Sections-> Check “Create a bibliography for each section” -> save the new style
- On the Word document: Insert section break to each chapter and apply the modified style
- See LibGuide Univ. Tennessee: <https://libguides.uthsc.edu/endnote/cwyw/separate-bibs>

Combining multiple word documents

- If you want to produce one single Word document with one reference list at the end. Before merging documents, all the references from each Word document must be exported into one EndNote Library. You can use in Word the [export traveling library](#) option to do this.
- See LibGuide Univ. Tennessee: <https://libguides.uthsc.edu/endnote/cwyw/combine-worddocs>

Add references from a PDF/word to Endnote with existing Endnote codes

- you can use the Export Travel Library command in word as long as the references originally came from either an EndNote desktop or an EndNote Web library, the field codes are still present, and you are using Microsoft Word with EndNote.
- **Note:** You may have problems if you are using a version of EndNote older than the version used by those sending you documents. EndNote field codes have changed over time, and an older version of EndNote may not recognize newer field codes.

Add references to Endnote from a PDF/word to Endnote without Endnote codes

- Upload the copied reference list to <https://citation-finder.vercel.app/> -> Choose RIS -> Search for matches -> check all references -> save the file and import it to Endnote
- See instruction in Tennessee LibGuide: <https://libguides.uthsc.edu/c.php?g=320620&p=7700501>

See lot's of Tips & Tricks at Tennessee University Health Sciences Center:
<https://libguides.uthsc.edu/endnote>



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UB Medizin

Spiegelgasse 5

<https://ub.unibas.ch/de/ub-medizin/>