Introduction to EndNote 21

Monika Wechsler   FS 2025

Agenda Full Course

1. Quick Start and Exercise

1.   Getting started
   - Install EndNote; Create an EndNote-Library
2.   Search and collect references
   - With PubMed (PC; Mac)
   - With google scholar
   - With PubMed, within EndNote
3.   Insert references into a Word document (CWYW)
4.   Exercise: Collect references in PubMed and google scholar and insert them from EndNote into your wordtext
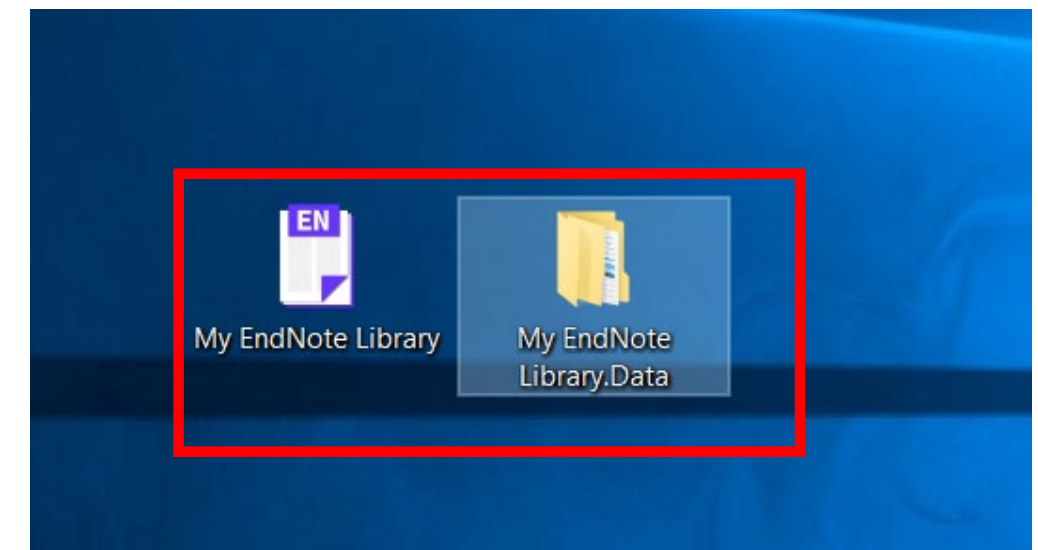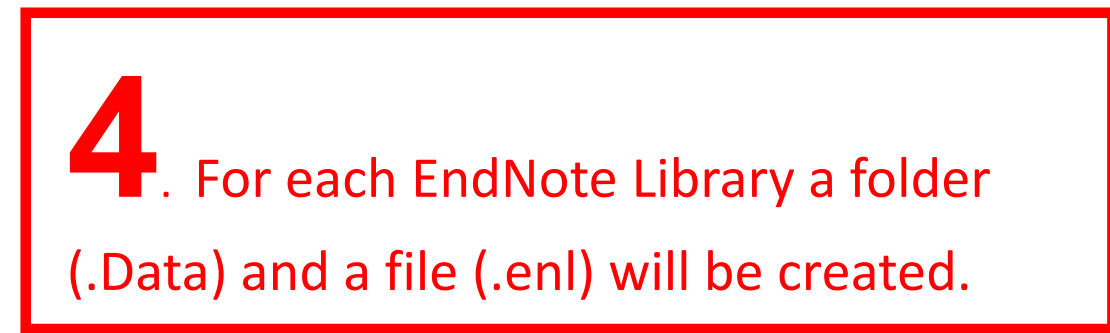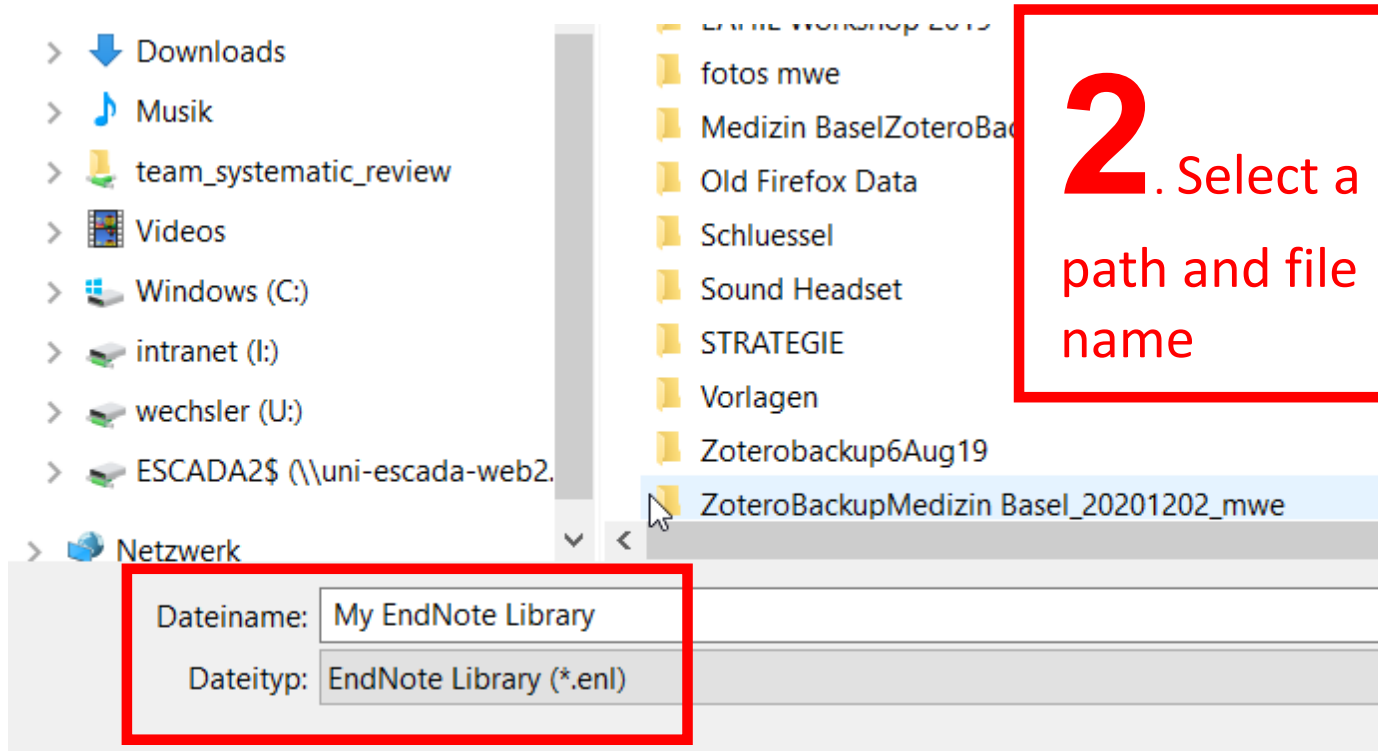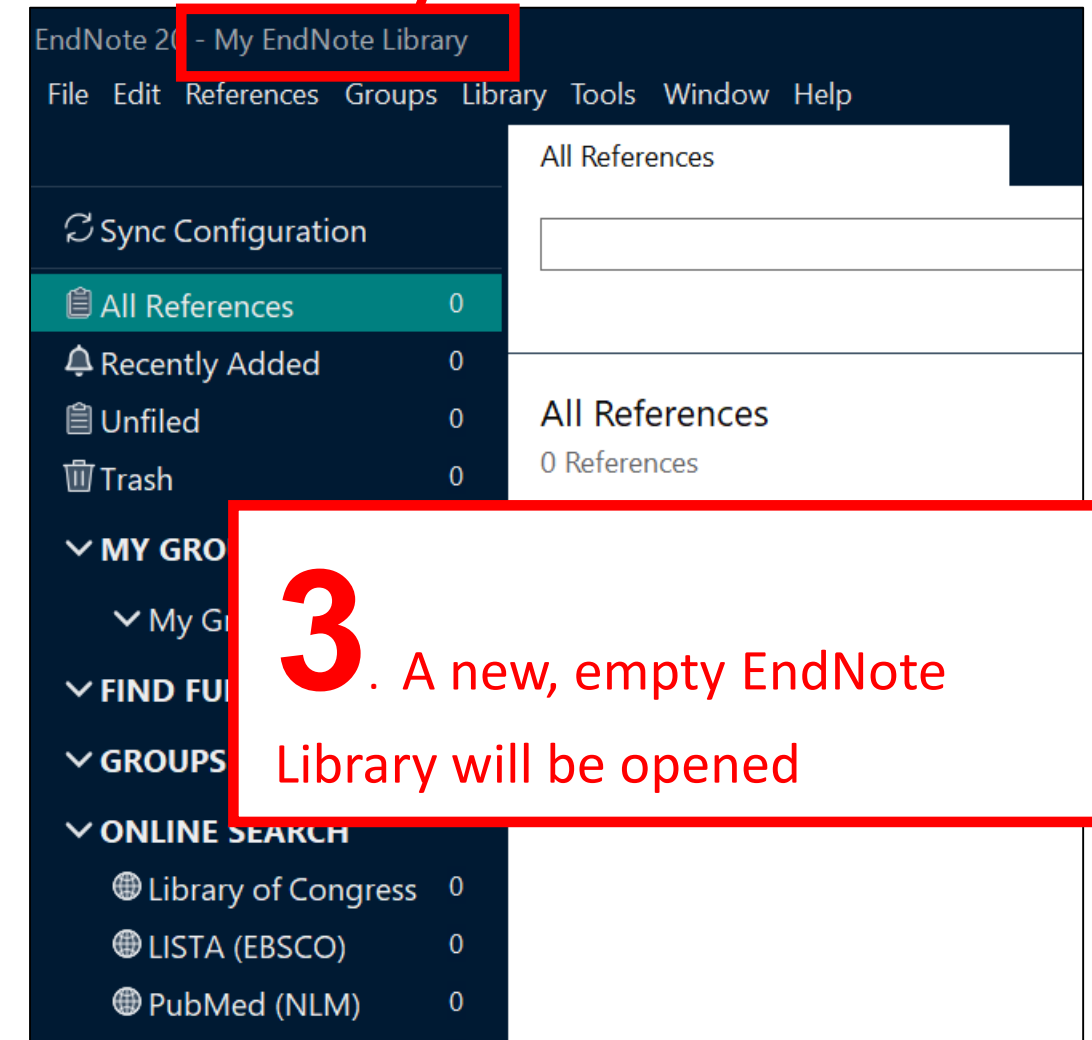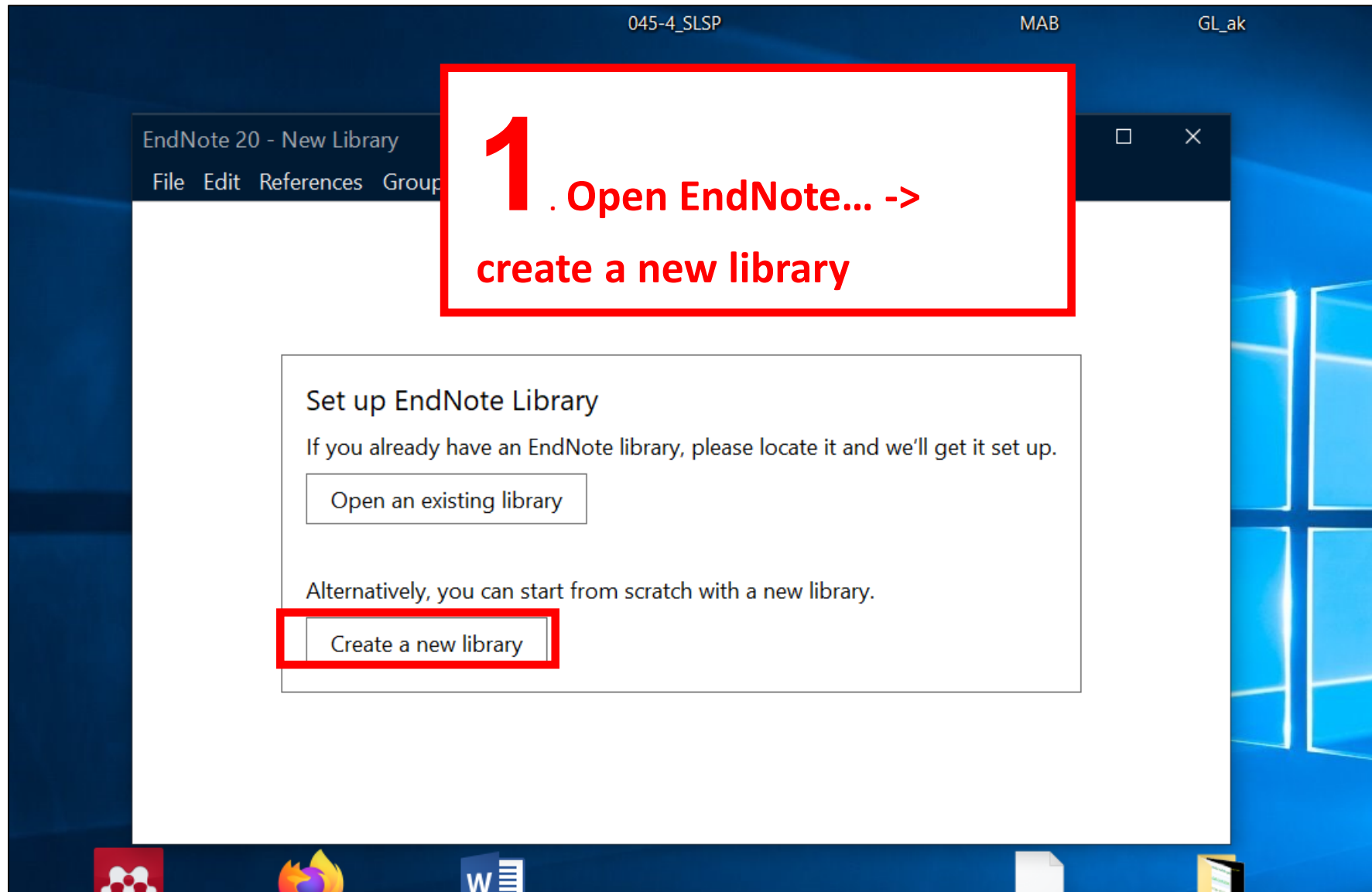
2. More Details

1. Search and collect references
   - With library catalogue swisscovery Basel
   - Create a reference from a PDF stored on your computer
   - Create a reference manually
2. Insert references into a Word document (CWYW)
   - Citation Styles / Journal Term Lists
3. Manage references in EndNote
   - Groups / Edit references / remove duplicates
   - Search for fulltext articles (PDFs); administer PDFs
   - Display fields; Defince own custom fields
4. EndNote web account
5. Library sharing incl. PDFs
6. FAQs
   Using EndNote with Google Docs ; Bibliography list after each chapter; Combining multiple word documents; add references from a PDF/word to EndNote, tagging references….

1.1. **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/

1.1. Getting started: Create a new EndNote Library

1. Open EndNote… -> create a new library

2. Select a path and file name

3. A new, empty EndNote Library will be opened

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

1.1. **Getting started:** opening EndNote with Mac (EndNote 20)

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."

1.2. Search and collect references: PubMed

The imported references in EndNote

1.2. Search and collect references: google scholar

1.2. Search and collect references: with PubMed within EndNote

2. Search fields PubMed

3 Search results PubMed

4 Select results for your EndNote Library

1 Search within PubMed

1.3. 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 insertet 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

| Datei | Start | Einfügen | Entwurf | Layout | Verweise | Sendungen | Überprüfen | Ansicht | Entwicklertools | Zotero | EndNote 21 |

EN Go to EndNote
Insert Citation
Edit & Manage Citation(s)
Edit Library Reference(s)

Style: APA 6th German
Update Citations and Bibliography
Convert Citations and Bibliography

Categorize References
Instant Formatting is Off

Export to EndNote
Manuscript Matcher
Preferences

Help

Citations   Bibliography   Tools

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 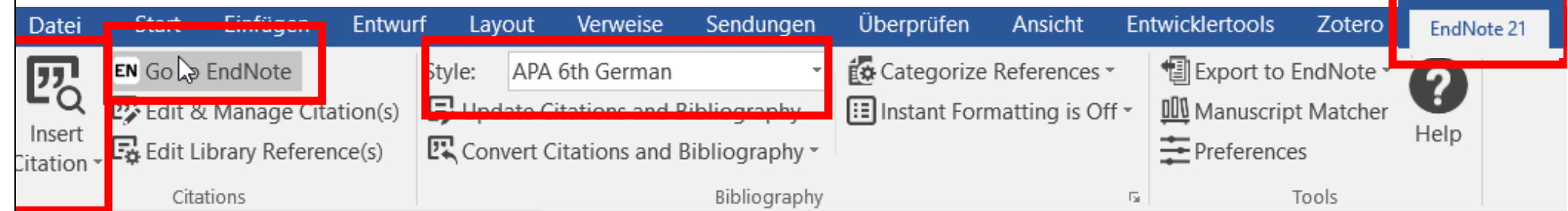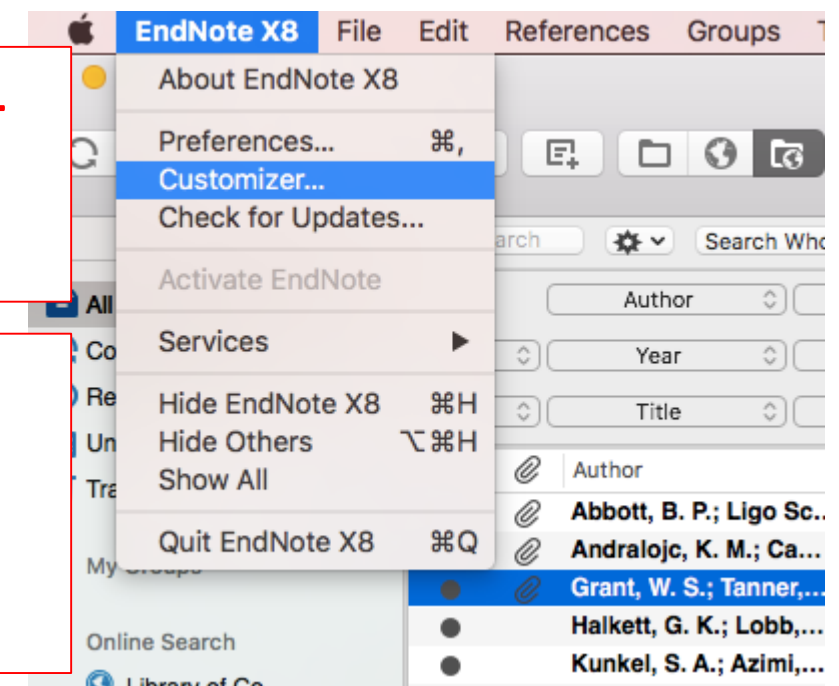fugiat nulla pariatur. Excepteur sint occaecat cupidatat non provident (Abdulla et al., 2008), sunt in culpa qui officia deserunt mollit anim id est laborum.

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: Doi 10.1056/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.

EndNote X8   File   Edit   References   Groups
About EndNote X8
Preferences...   ⌘,
Customizer...
Check for Updates...
Activate EndNote
Services   ▶
Hide EndNote X8   ⌘H
Hide Others   ⌥⌘H
Show All
Quit EndNote X8   ⌘Q

1.4. Exercise

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

2.1. 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/

EndNote™

← Back to Connections

University of Basel

Connections Database: Library Catalog

Connections Date: Thursday, July 15, 2021

Connections Catalog Type: Library Catalog

Connections File Name: U Basel.enz

Get Started

Buy EndNote

Learn More

Request a trial

1.

Download Connection

4.

U Basel

File Edit Tools Window Help

- About This Connection
- Connection Settings
- Search Attributes
- Templates
- Author Parsing
- Continuation Lines
- Default Reference
- Editor Parsing
- Field Editing
- MARC Records
- Record Layout
- Source Parsing

File Name: U Basel
Based on: ALMA
Category: Library Catalog
Created: Dienstag, 19. Oktober 2021, 11:24:09

Save As   ?   ✕

Connection name: U Basel   Save

Cancel

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)

∨ GROUPS SHARED BY …

∨ ONLINE SEARCH
  🌐 Library of Congress   0
  🌐 LISTA (EBSCO)   0
  🌐 PubMed (NLM)   0
  🌐 swisscovery-abi   0
  🌐 swisscoveryBasel-…   0
  🌐 Web of Science C…   0
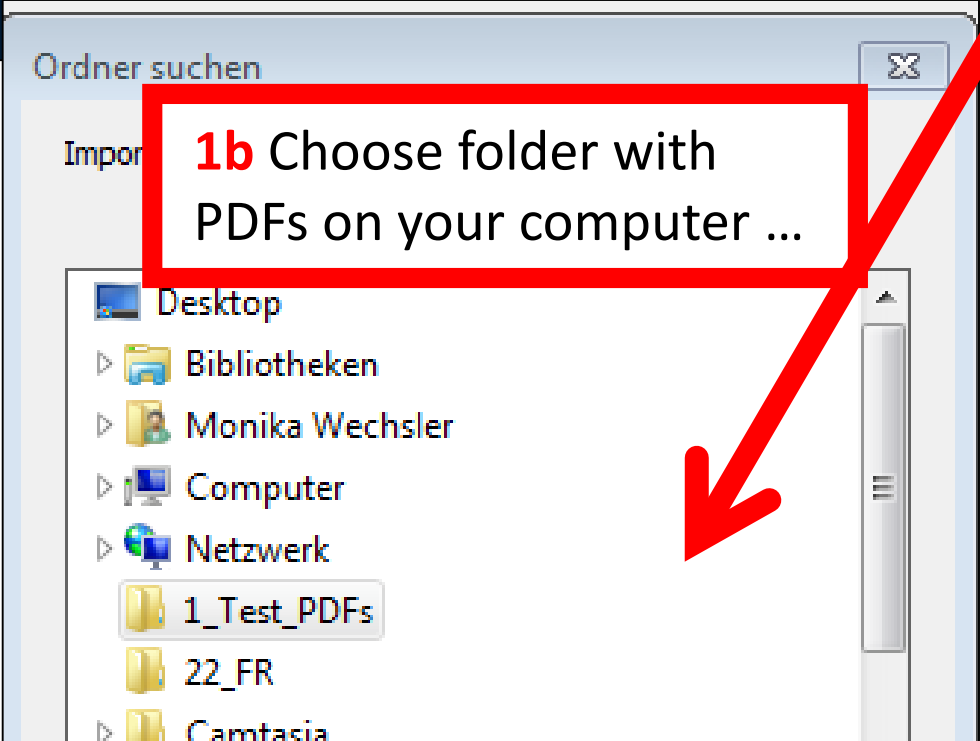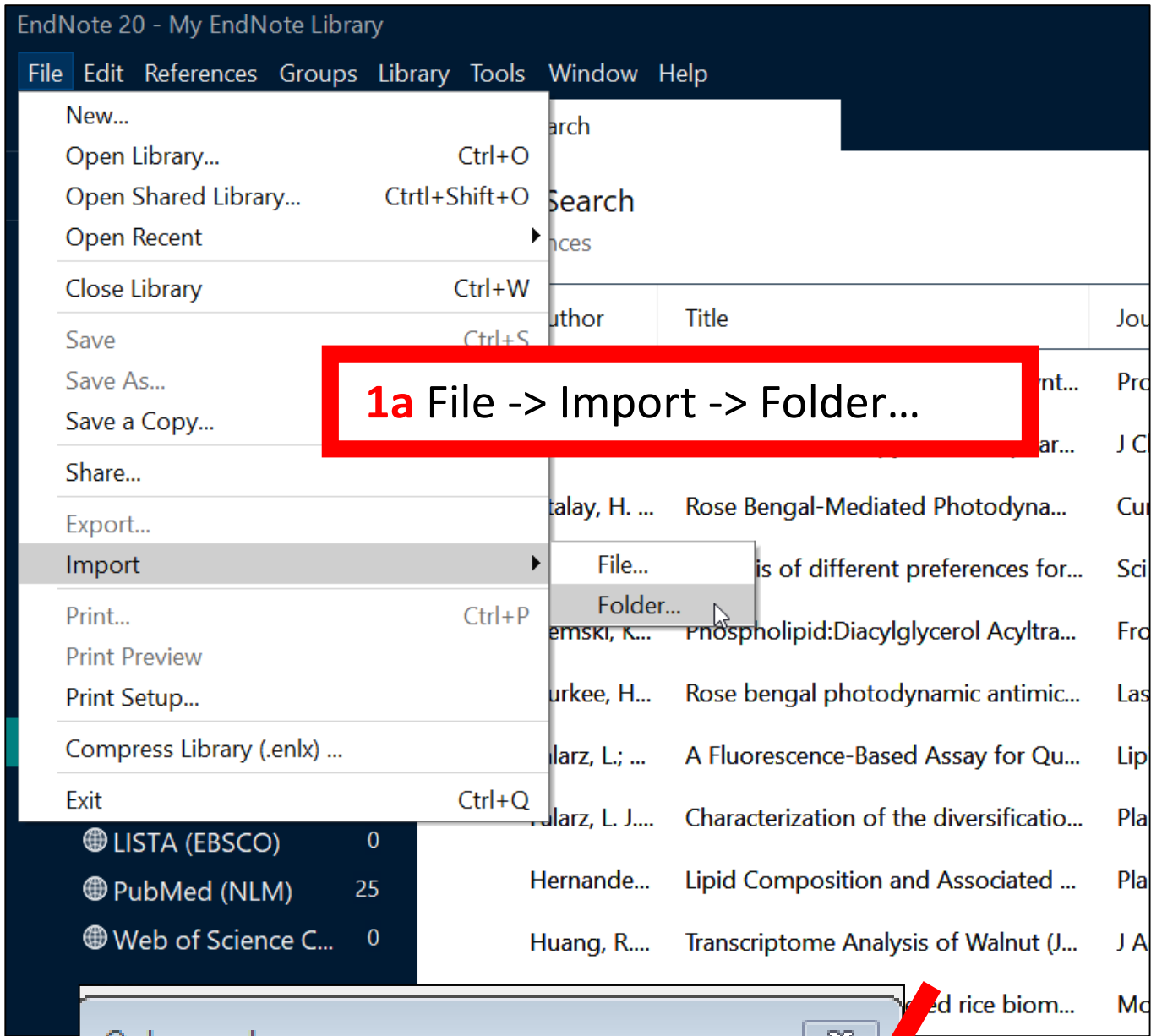 more…

5.

📎 Sripa, Banc…   2012

Choose A Connection

Name
U Aberdeen
U Adelaide
U Akron
U Alabama-Birmingham
U Alaska-Fairbanks
U Alberta
U Arizona
U Auckland
U Auto de Barcelona
U Autonoma de Madrid
U Barcelona
U Basel

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

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

EndNote 20 - My EndNote Library

File Edit References Groups Library Tools Window Help

File menu	
New...	
Open Library...	Ctrl+O
Open Shared Library...	Crtl+Shift+O
Open Recent	▶
Close Library	Ctrl+W
Save	Ctrl+S
Save As...	
Save a Copy...	
Share...	
Export...	
Import	▶
Print...	Ctrl+P
Print Preview	
Print Setup...	
Compress Library (.enlx) ...	
Exit	Ctrl+Q

Import submenu:
- File...
- Folder...

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

LISTA (EBSCO) 0
PubMed (NLM) 25
Web of Science C... 0

Ordner suchen

Import

1b Choose folder with PDFs on your computer …

- Desktop
  - Bibliotheken
  - Monika Wechsler
  - Computer
  - Netzwerk
  - 1_Test_PDFs
  - 22_FR
  - Camtasia

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>		

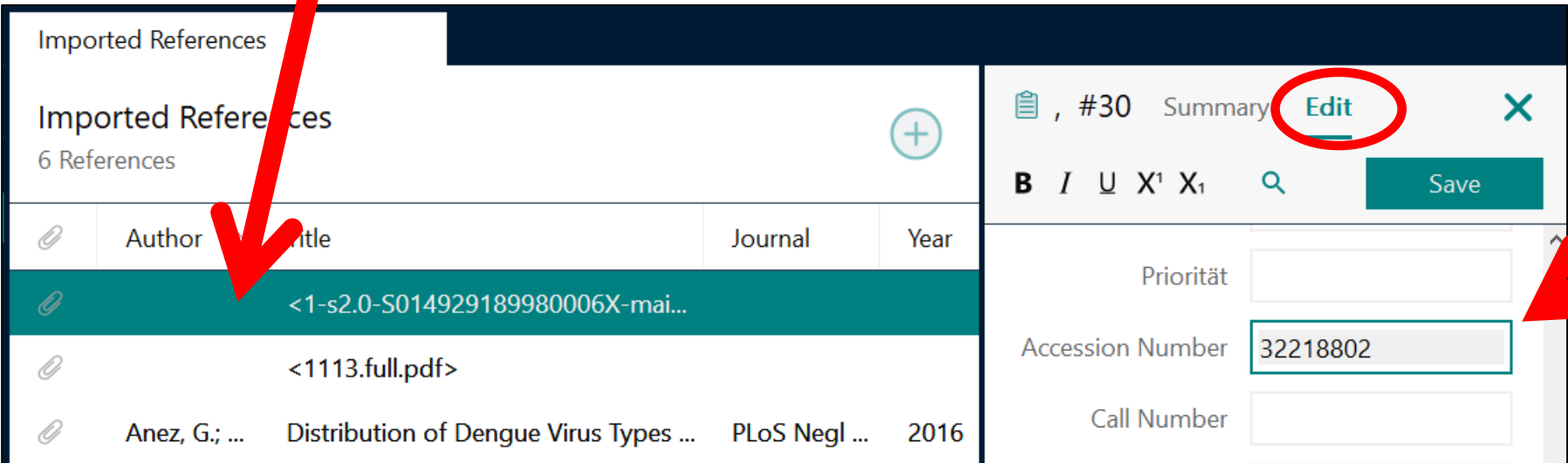**2a** Metadata of the article will be completed automatically in EndNote

2b No metadata available: see next slide

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

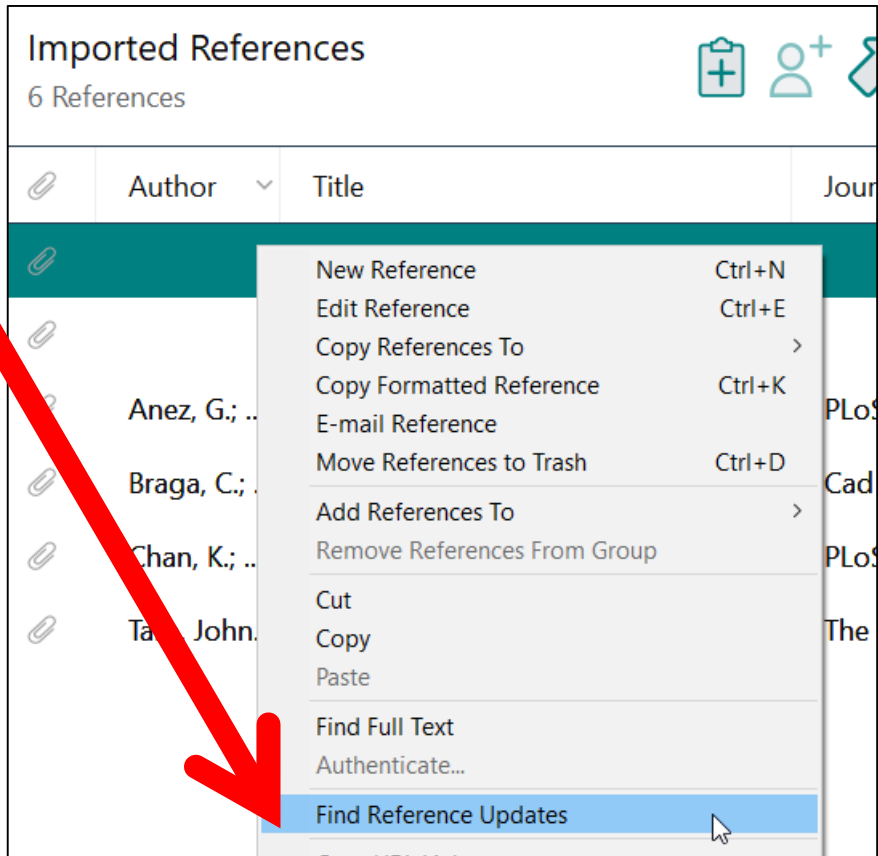**1. What to do if metadata of your imported PDF is missing?**

2. If the document has an ID, fill it out in the following field:
- Accession Number: PubMed ID
- PMCID: PumMed Central ID
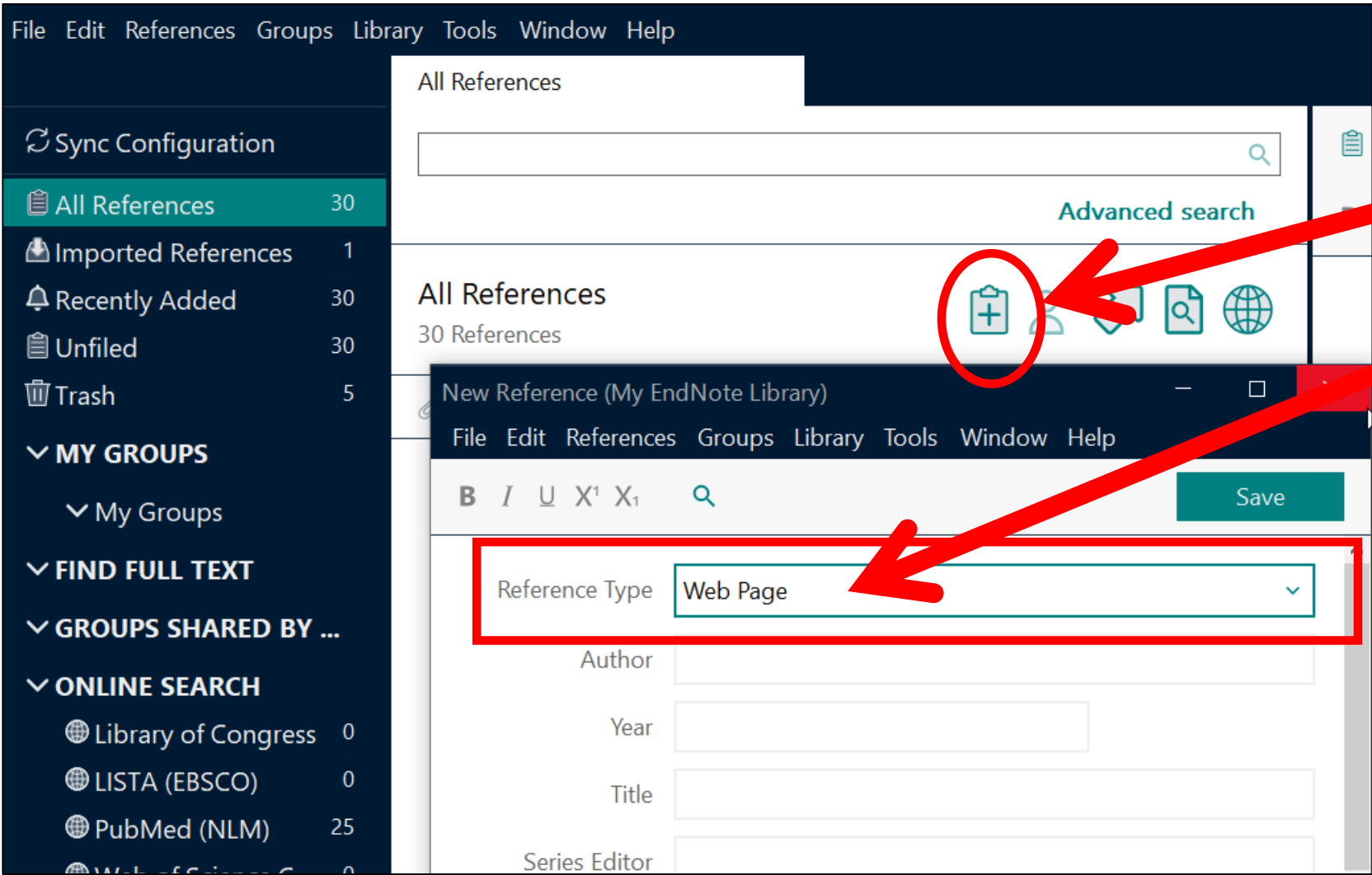- DOI
- ISBN…

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

2.1. Search and collect references: Create a reference manually
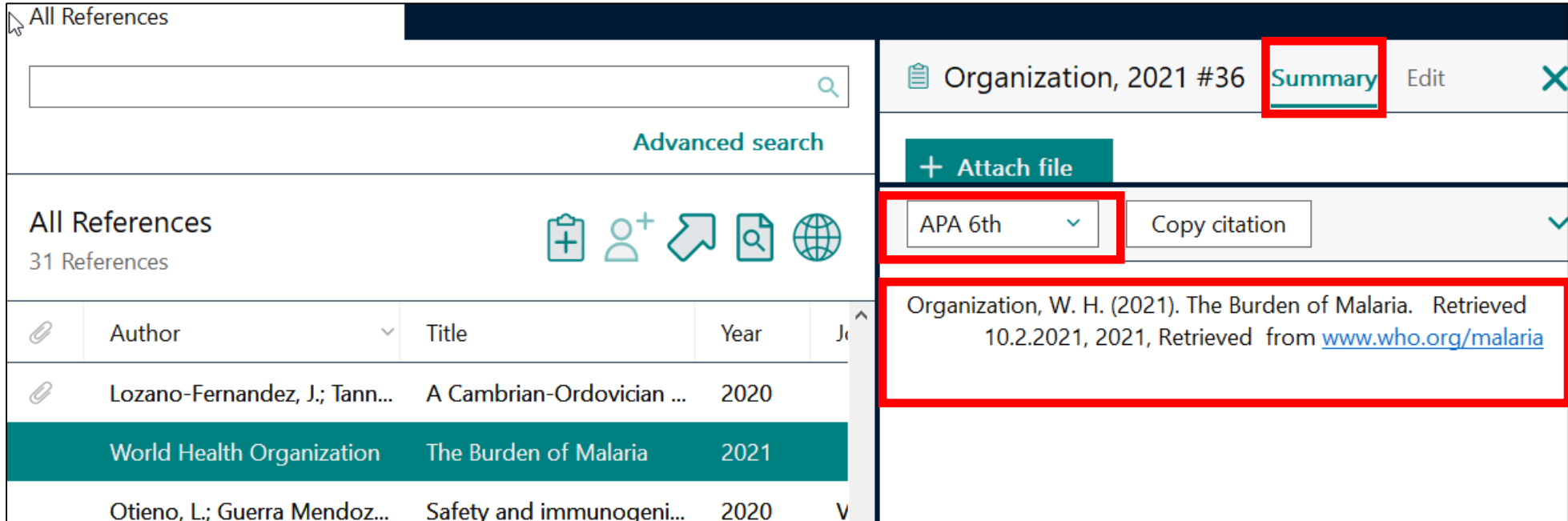

Create a new reference manually

Choose correct reference type

Cataloguing Authors:

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

Organisations:
Name of the Organisation**,**

Check always the output:
Summary

2.2. Insert references into a Word document: format the bibliography in Word
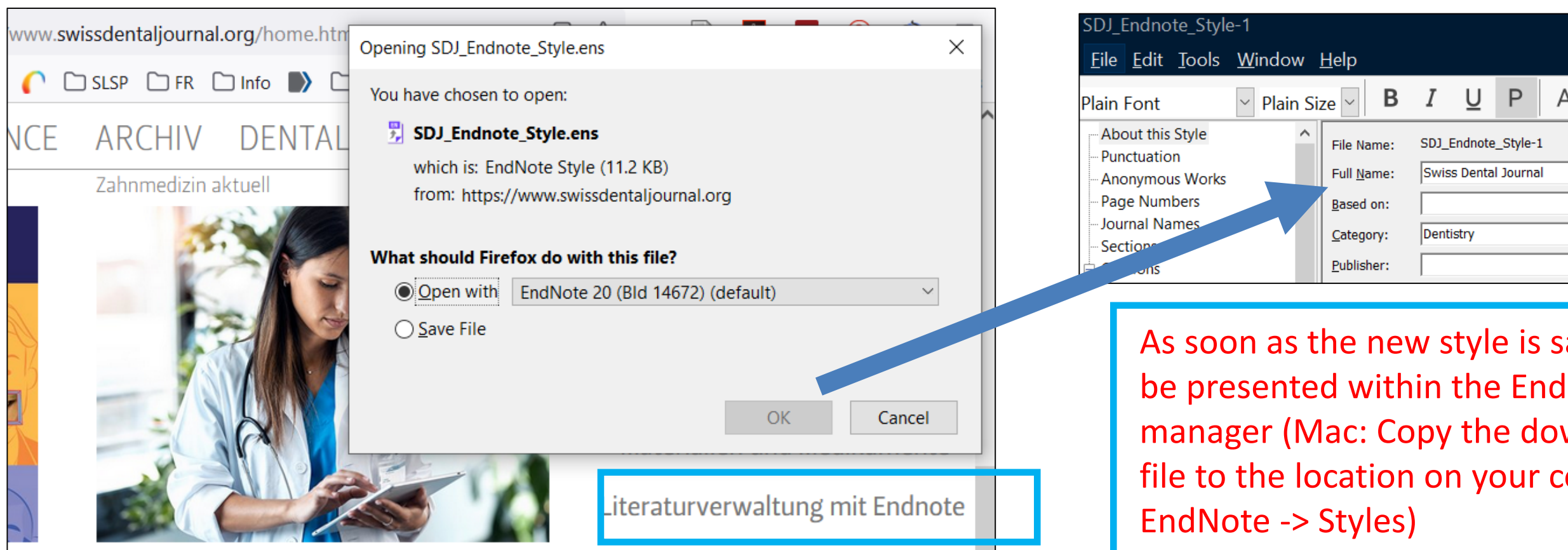
2.2. Insert references into a Word document:
Import a missing style to Endnot

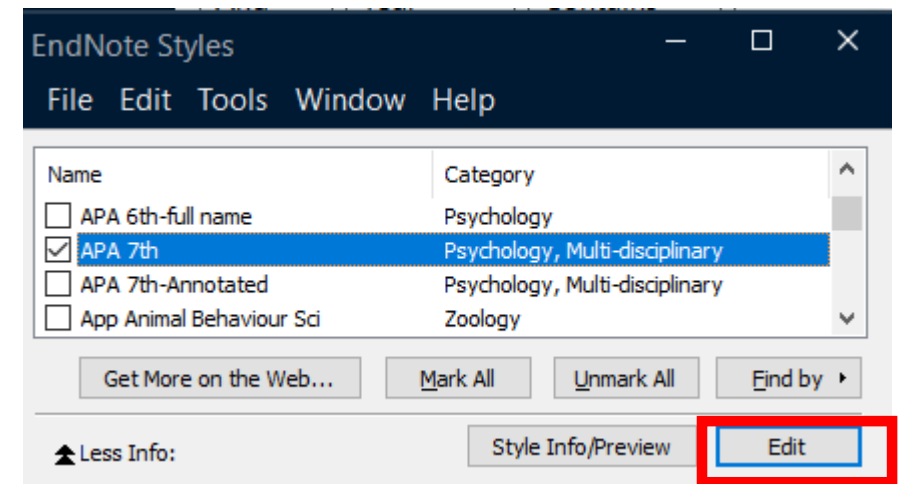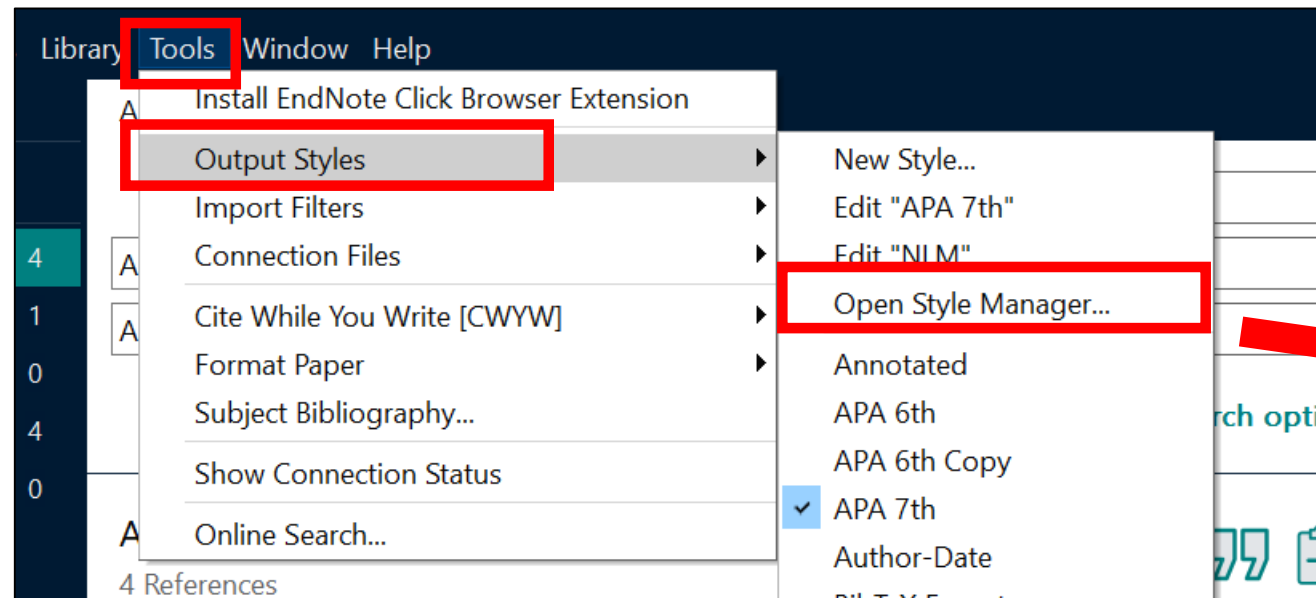A: Import a style from the EndNote platform

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)
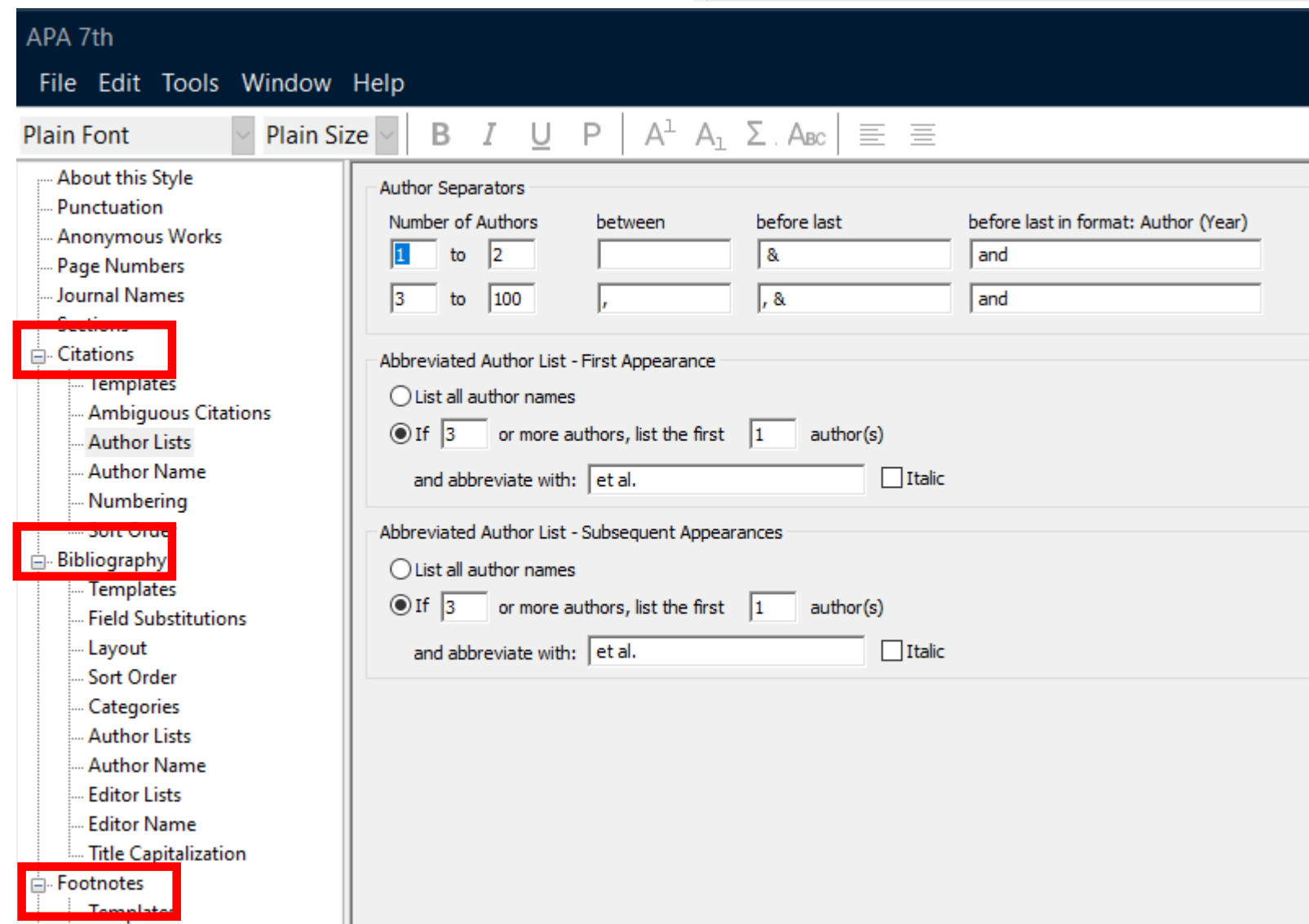
2.2. Insert references into a Word document:
Edit an existing style in EndNote

Library | Tools | Window | Help

Install EndNote Click Browser Extension

Output Styles   ▶
Import Filters   ▶
Connection Files   ▶
Cite While You Write [CWYW]   ▶
Format Paper   ▶
Subject Bibliography...
Show Connection Status
Online Search...

New Style...
Edit "APA 7th"
Edit "NLM"
Open Style Manager...
Annotated
APA 6th
APA 6th Copy
✓ APA 7th
Author-Date

4 References

EndNote Styles

File Edit Tools Window Help

Name	Category
☐ APA 6th-full name	Psychology
☑ APA 7th	Psychology, Multi-disciplinary
☐ APA 7th-Annotated	Psychology, Multi-disciplinary
☐ App Animal Behaviour Sci	Zoology

Get More on the Web... | Mark All | Unmark All | Find by ▶

▲ Less Info: Style Info/Preview   Edit

APA 7th

File Edit Tools Window Help

Plain Font | Plain Size | B I U P A¹ A₁ Σ. A𝐵𝐶 ≡ ≡

- About this Style
- Punctuation
- Anonymous Works
- Page Numbers
- Journal Names
- Sections
- **Citations**
  - Templates
  - Ambiguous Citations
  - Author Lists
  - Author Name
  - Numbering
  - Sort Order
- **Bibliography**
  - Templates
  - Field Substitutions
  - Layout
  - Sort Order
  - Categories
  - Author Lists
  - Author Name
  - Editor Lists
  - Editor Name
  - Title Capitalization
- **Footnotes**
  - Template

Author Separators

Number of Authors	between	before last	before last in format: Author (Year)
1 to 2		&	and
3 to 100	,	, &	and

Abbreviated Author List - First Appearance

○ List all author names
● If 3 or more authors, list the first 1 author(s)
   and abbreviate with: et al.   ☐ Italic

Abbreviated Author List - Subsequent Appearances

○ List all author names
● If 3 or more authors, list the first 1 author(s)
   and abbreviate with: et al.   ☐ Italic

Make adjustments

- to the in-text citation, such as the number of listed authors

- to the bibliography list (e.g. check templates)

- to the footnote citations if the chosen citation style allows footnotes

Save the modified style with a new name to preserve the original

2.2. Insert references into a Word document: 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 journal term lists -> Menu *Library/Open Term Lists/Journals/Lists/Import List…*
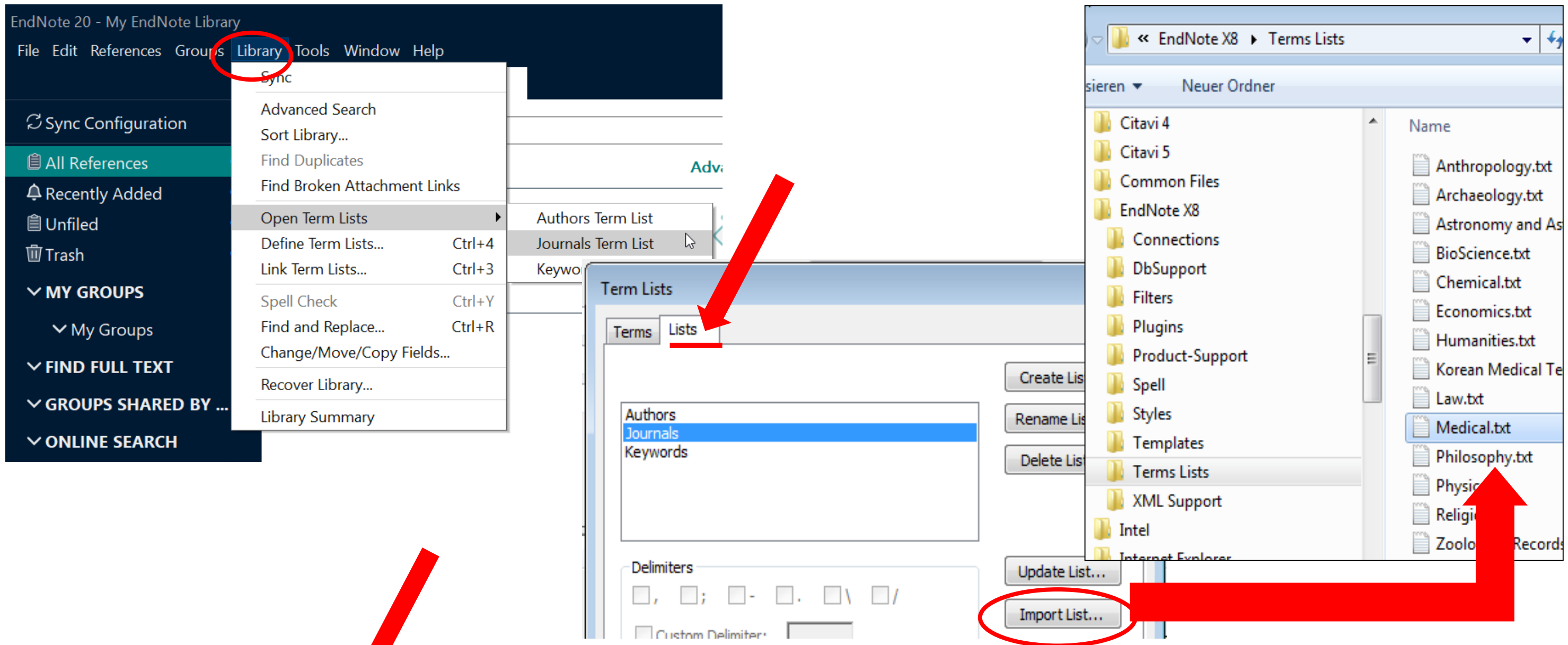
Already imported terms should be deleted before importing the standardized term list:
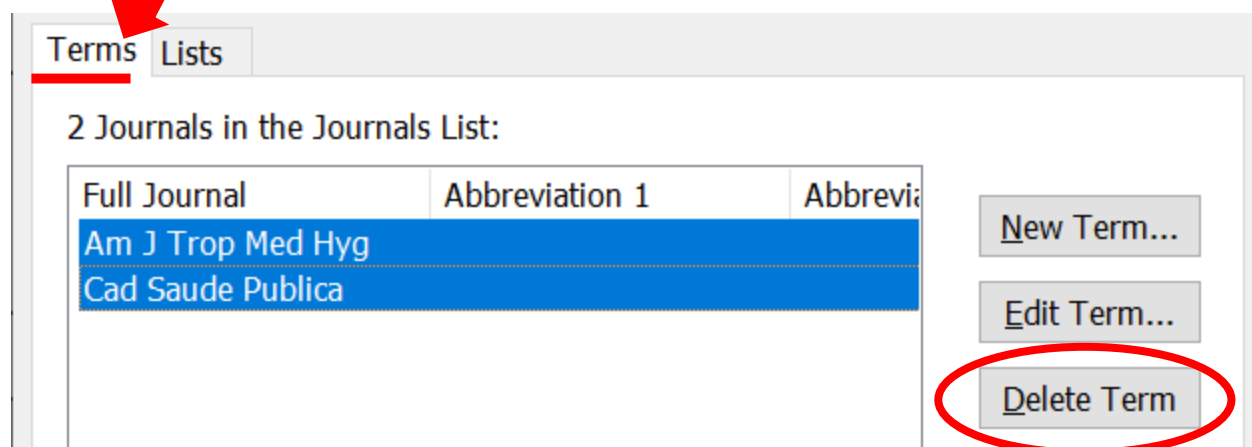
2.3. **Manage references in EndNote:** Groups and Groupsets

My EndNote Library

File Edit References Groups Library Tools Window Help

All References

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

Group Set = Header of several groups

⟳ Sync Configuration

📋 All References	11
📄 Dokument1	1
🔔 Recently Added	8
📋 Unfiled	
🗑 Trash	

**Introduction =
a Group**

∨ MY GROUPS

  ∨ Chapters
    📂 Introduction   4
    📂 Methodology   1

  ∨ Noch lesen
    📂 1. Prio   1
    📂 2. Prio   3

**Noch lesen =
a Groupset**

Author

And ⌄ Year   Contains

And ⌄ Title   Contains

Simple search   Search options ⌄

...rences
11 References   99 📋 👤⁺ ‹

| 📎	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 ...

2.3. Manage references in EndNote:
find and remove duplicates
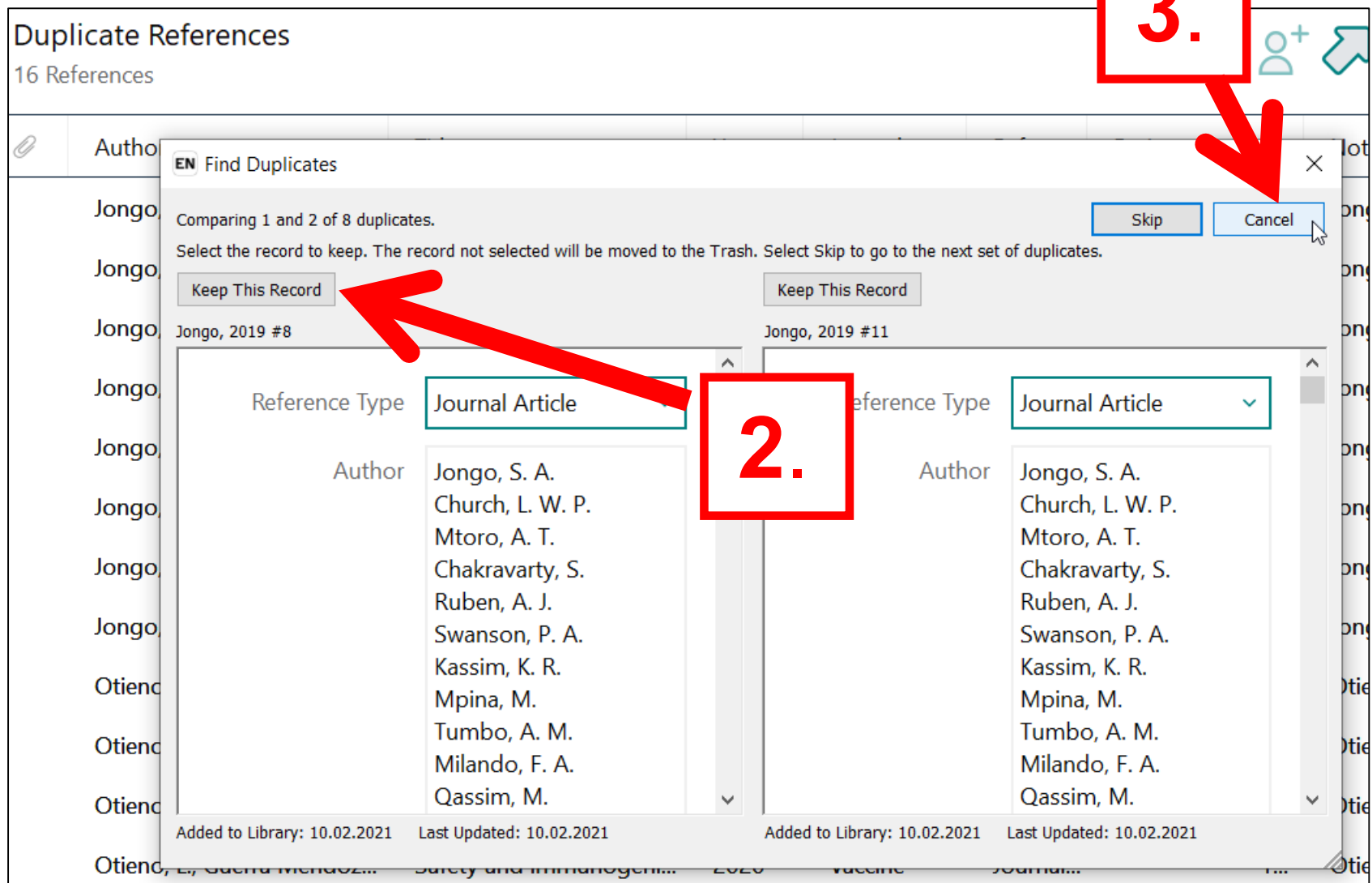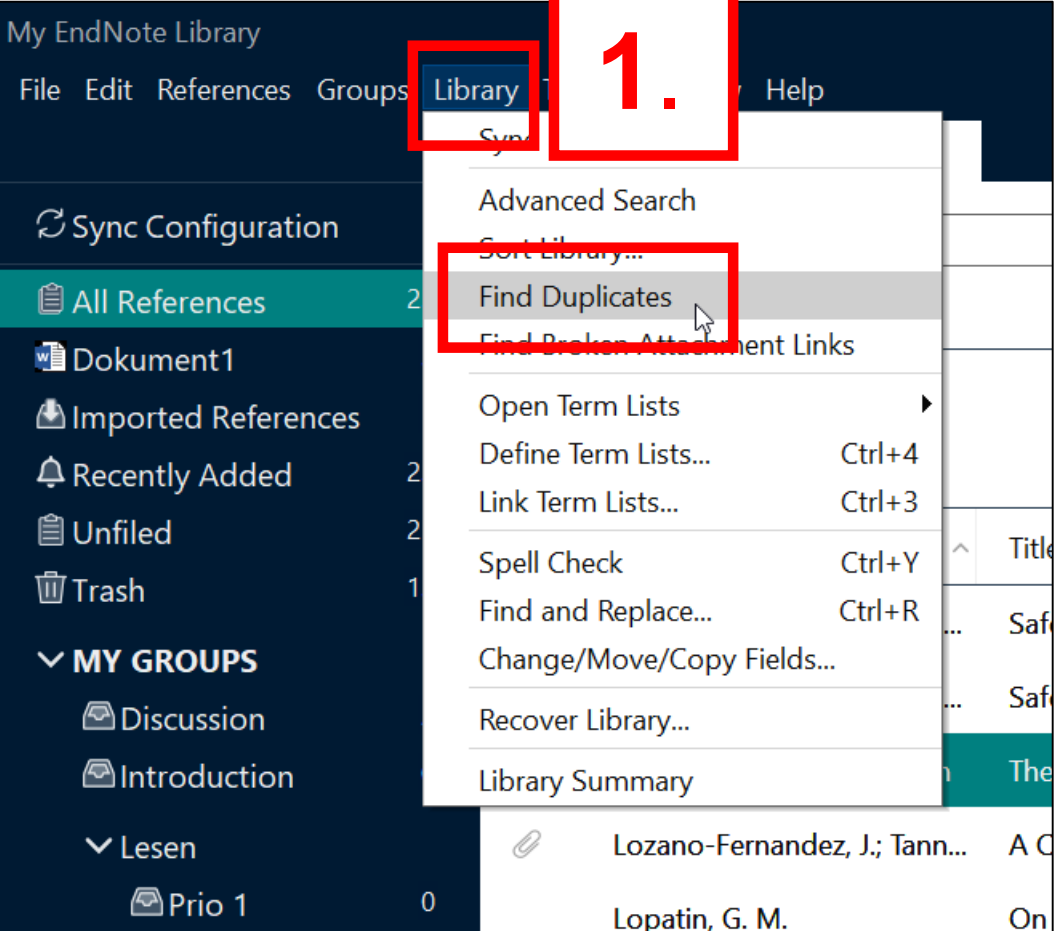
1- Menu *Library -> Find Duplicates*

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

If the EndNote plugin is not automatically offered for opening when exporting results from a database in the browser, the settings in the browser should be changed.

Firefox -> Settings -> General -> Files and Applications:

What should Firefox do with other files?

○ Save files

● Ask whether to open or save files

Edge -> Settings -> Downloads:

Ask me what to do with each download

Always ask me if I want to save a file or open it without saving

Safari: Preferences -> General -> Downloads

2.3. Manage References: search fulltexts/PDFs automatically

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?

2.3. Manage references in EndNote: PDF handling

All References
12 References

📎	Author		Year	Journal	Ref
📎	...cary, B. M.	Malaria in Infants	1944	Ind Med Gaz	Jou
	Goodman, Kenneth W.	Ethics, medicine, and inf...	2015		Boo
📎	Jongo, S. A.; Church, L. W. ...	Safety and Differential A...	2019	Am J Trop ...	Jou

EndNote has found 2 PDFs

https://www.ajtmh.or
g/downloadpdf/journ
als/tpmd/100/6/articl
e-p1433.pdf

File Attachments 📄 Jongo-2... ∨

+ Attach file

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»)

EndNote Preferences

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

PDF Auto Renaming Options
- ○ Don't Rename
- ● Author + Year + Title
- ○ Author + Title
- ○ Author + Year
- ○ Title
- ○ Custom

Note: Filenames may be up to 50 characters long.

PDF Auto Import Folder
- ☑ Enable automatic importing
- h\ub-home$\wechsler\Desktop\PDFs lesen   [Select Folder]

| EndNote Defaults | Revert Panel | | OK | Abbrechen | Übernehmen |

2.3. 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.

2.3. Manage references in EndNote: Display fields

Display fields in the central overview list:

All References						
653 References		🔖 📋 👤⁺ ↗ 🔍 🌐				
Added...	📎	Author	Year	Journal	∧ Title	⚙ ∧
03.12....		Akahane...	1996		Studies on the ne...	

Change the display of the fields in the central overview list

Display fields in each reference:

Menu -> Edit -> Preferences... -> Reference Types -> Modify Reference Types...

EndNote Preferences

- Change Case
- Display Fields
- Display Font
- Duplicates
- Find Full Text
- Folder Locations
- Formatting
- Libraries
- PDF Handling
- Read / Unread
- Reference Types
- Sorting

Reference Types

Default Reference Type: Journal Article   Modify Reference Types...

Note: Use the reference types table to add, delete, or rename field names or to modify reference types. The table CANNOT be used to reorder the fields in the reference editor.

Reference Type Table

Changes made to Reference Types are stored in a special RefTypeTable.xml file. new file or to share your file with others, use these Import and Export options:

Delete the description of each field you do not want to be displayed in the references

Generic	Journal Article
Short Title	
Alternate Title	
ISBN/ISSN	ISSN
DOI	DOI
Original Publication	Original Publicatior
Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item

2.3. **Manage references in EndNote:** Define own custom fields

1. Menu -> Edit -> Preferences... -> Reference Types -> Modify Reference Types...
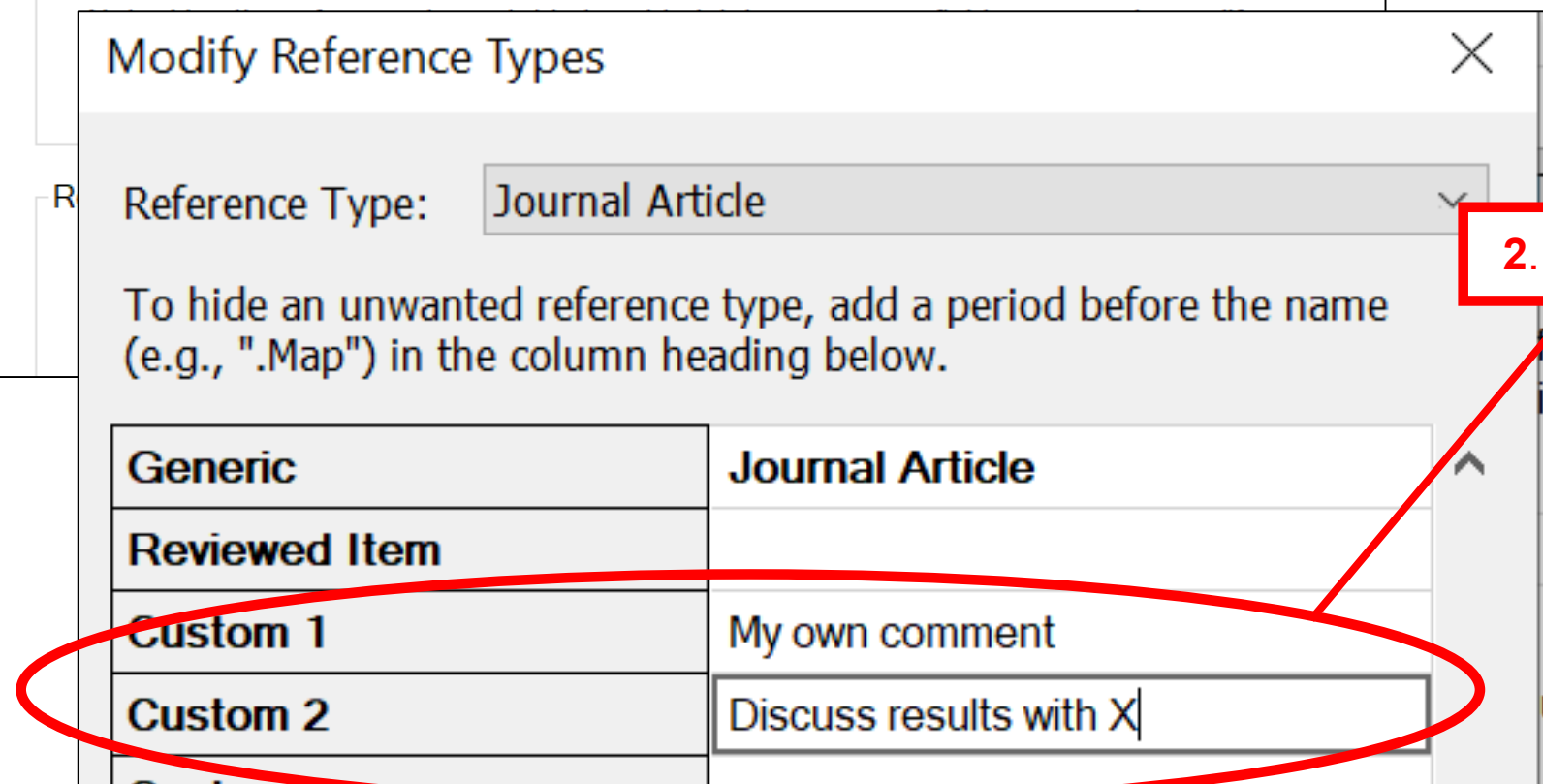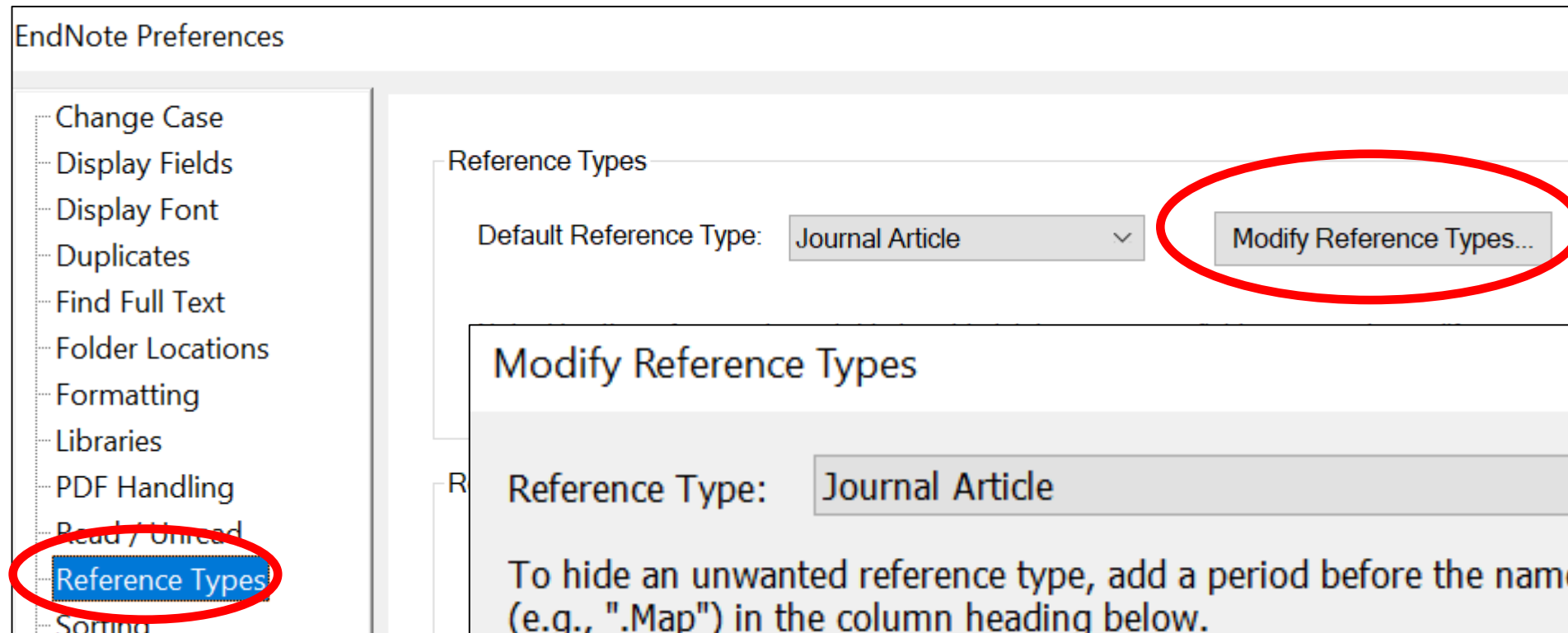
2. Label empty custom fields

3. Result:

These custom fields can be displayed in the central overview list as well (see slide before)

2.4. EndNote Web account: register & synchronize

- With EndNote Web 21 you can access your library including PDFs via the cloud. Switch between online, desktop and iPad applications.
- The web account of EndNote Web 21 is free of charge if you have purchased EndNote desktop.

- Register for the webaccount **within EndNote desktop**:
  Edit -> Preferences -> Sync… -> Enable Sync -> Sign up

- *Synchronize your library in EndNote Desktop*
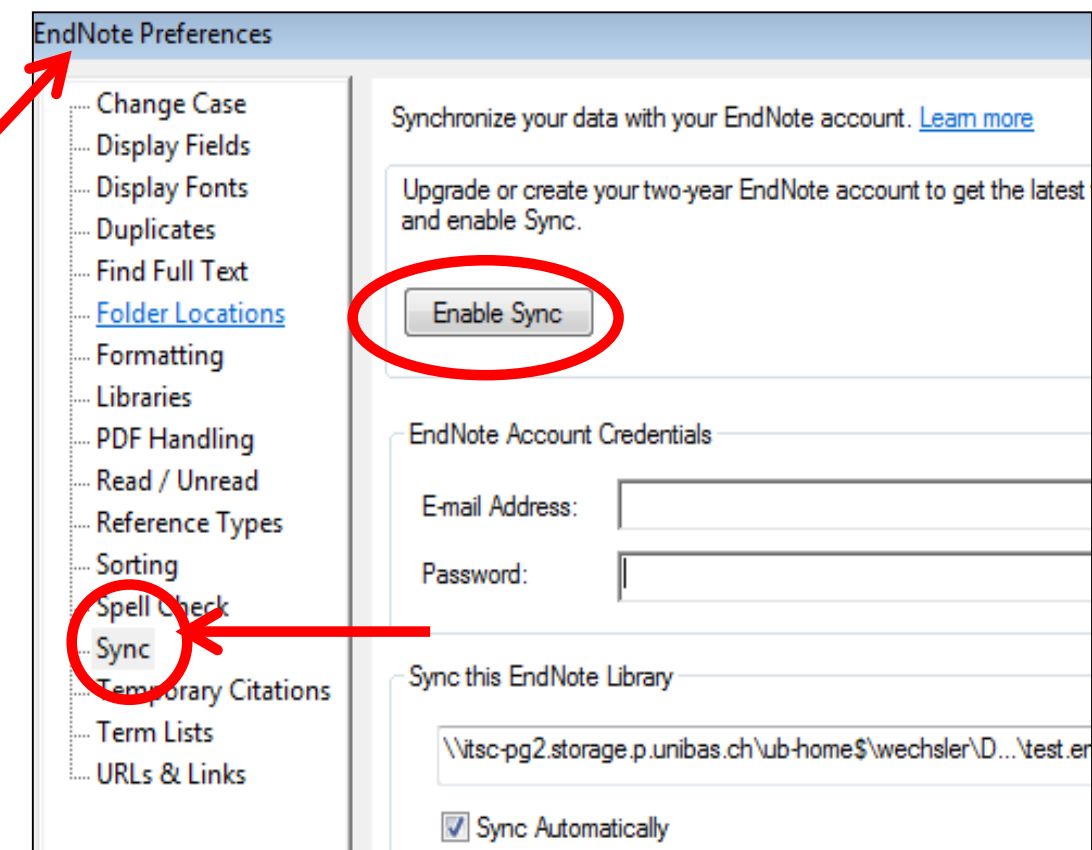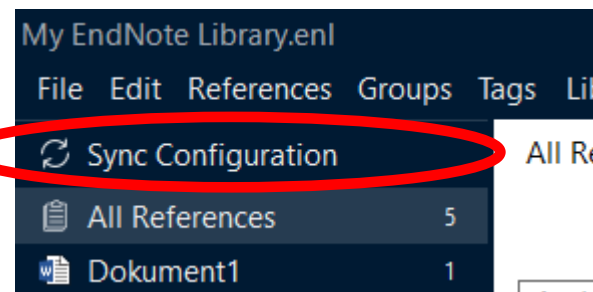
- LogIn for EndNote Web 21 on *https://endnote.com/login/*

Important note:
If you have an online library synced that is different to the one you want to sync now, both libraries will be merged: there is one web account only and therefore one online library only): **Only one Library can be synced with EndNote online at any one time.**

2.5. Sharing Libraries
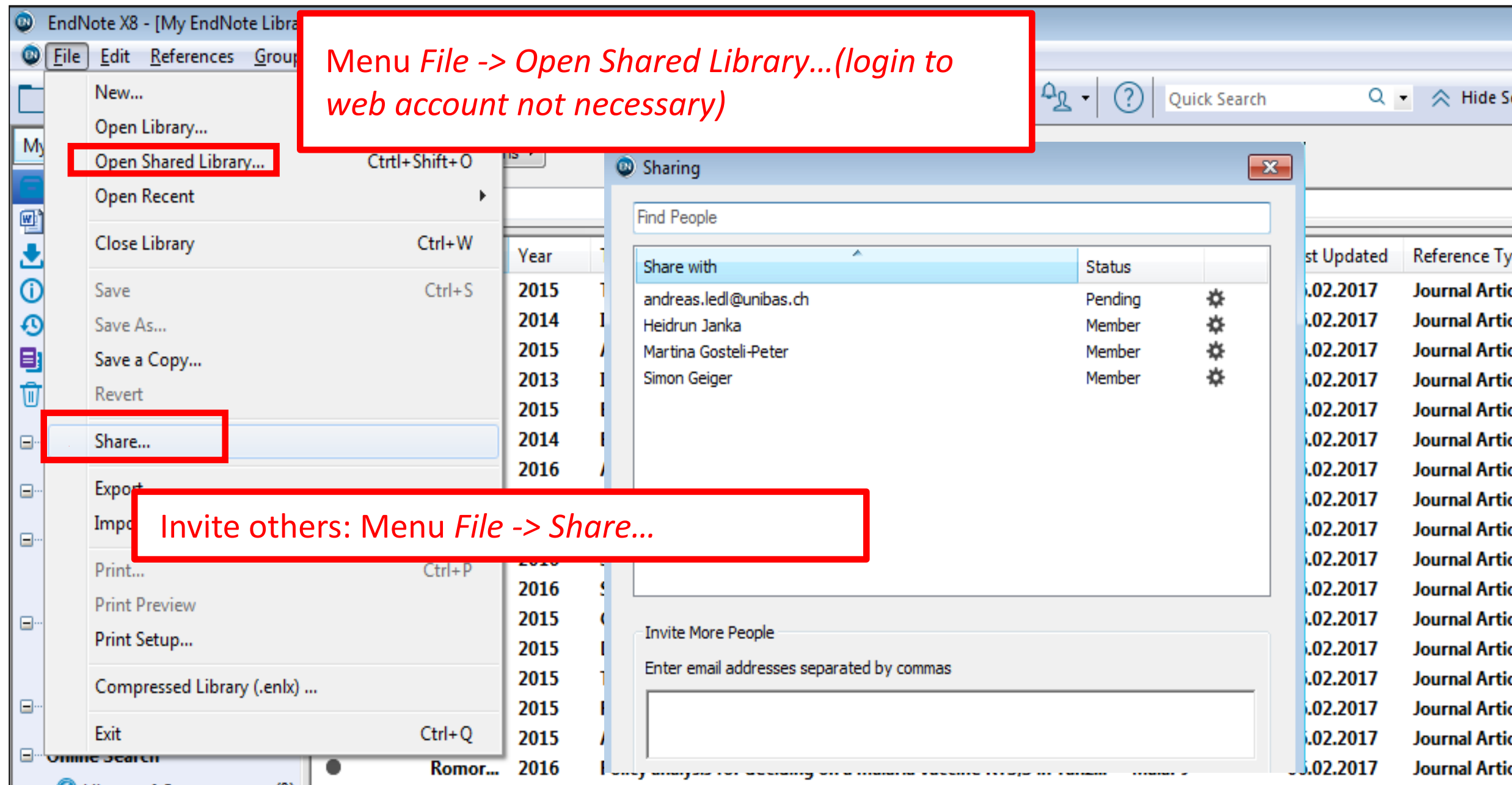
- Version X7.2 and higher
- Share references with others incl. PDFs; PDFs may be annotated
- 100 persons per library
- Unlimited storage
- Only 1 library may be shared with others!
- All participants have same rights (add, edit, delete references, annotate PDFs …)
- Web account is a condition to share but is not necessary to open.
- You can share groups instead of the whole library by right mouse clicking on a group and selecting Share Group.

My EndNote Library

File Edit References Groups Library Tools Window Help

New...
Open Library...   Ctrl+O
Open Shared Library...   Ctrtl+Shift+O
Open Recent

Close Library

Save
Save As...
Save a Copy...

Share...

Export...
Import

Print...   Ctrl+P
Print Preview
Print Setup...

Compress Library (.enlx) ...

Exit   Ctrl+Q

FIND FULL TEXT
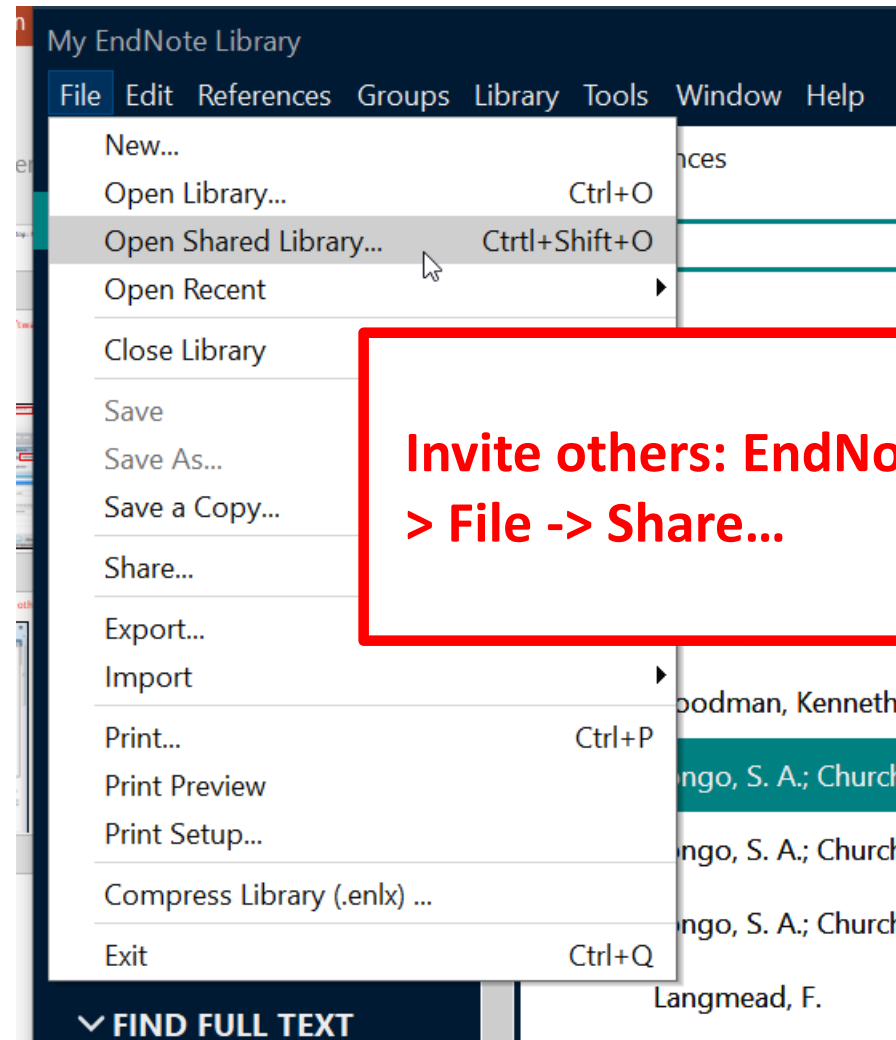
Invite others: EndNote Desktop -> File -> Share...

Sharing

Find People

Share with	Status	
andreas.ledl@unibas.ch	Pending	⚙
Heidrun Janka	Member	⚙
Martina Gosteli-Peter	Member	⚙
Simon Geiger	Member	⚙

Invite More People

Enter email addresses separated by commas

Add a message: (optional)

Invite

Close

You are sharing your library with 4 people out of a possible 100.
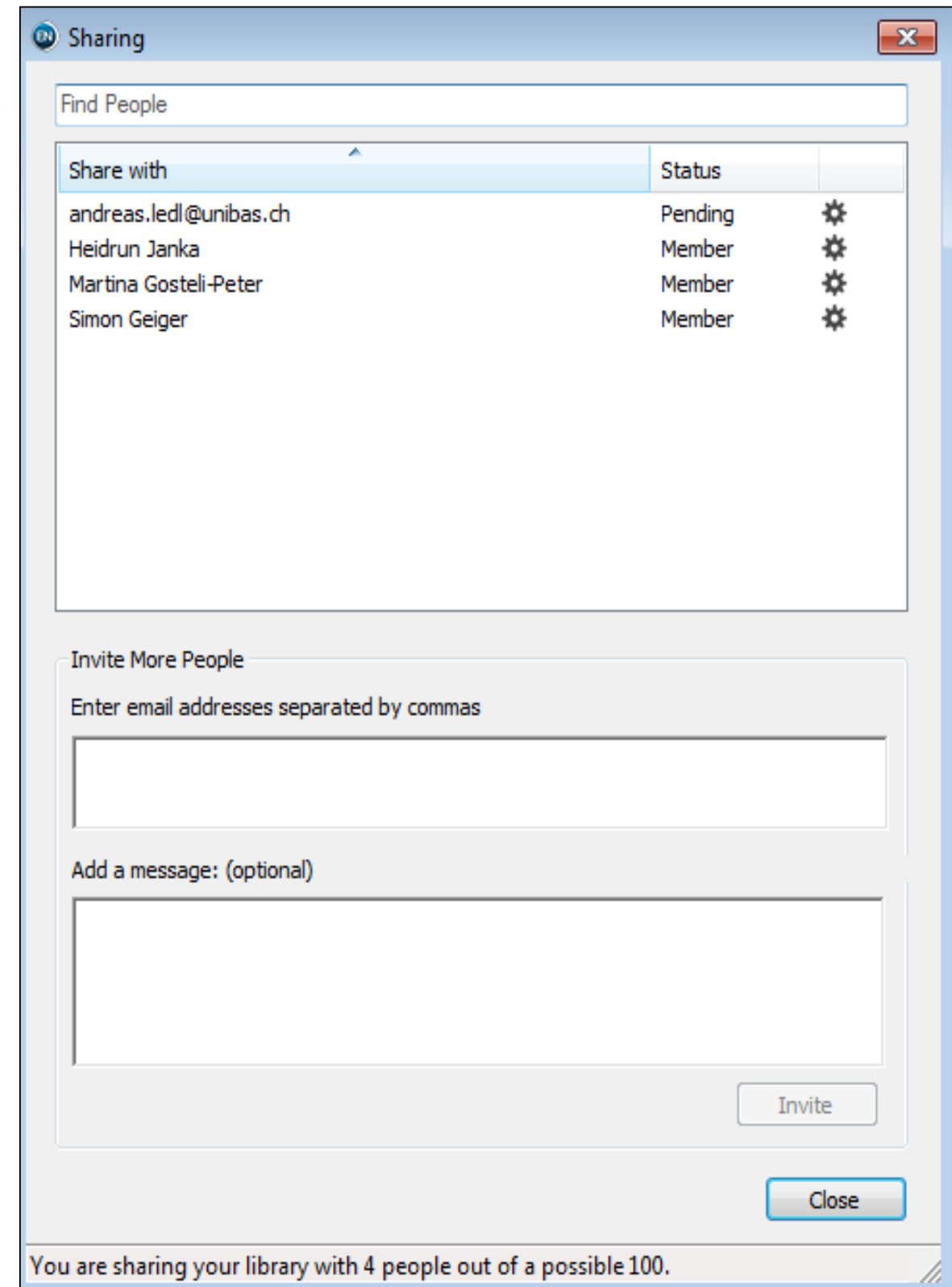
2.6. FAQs

Using EndNote 21 with Google Docs and with Word Online
- EndNote Cite While You Write add-on now has a native integration with Google Docs as well Word Online and is a tool for collaboration with research colleagues. It allows to pool own references with collaborators' references.
- See Univ. of London: https://library-guides.ucl.ac.uk/endnote/endnote-online-and-word

Using EndNote with Google Docs (EndNote 20 and before)

- There is no EndNote Cite While You Write tool available for Google Docs for earlier EndNote versions However it is still possible to use earlier EndNote Versions 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 Univ. Manchester: https://manchester-uk.libanswers.com/teaching-and-learning/faq/185876

2.6. FAQs

Combining multiple word documents

- See LibGuide Univ. London: https://library-guides.ucl.ac.uk/endnote/long-documents

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

1. Copy the references from the PDF file.
2. Go to https://citation-finder.vercel.app/ and paste each reference on a new line.
3. Choose "RIS" and verify the information.
4. Download the .ris and import to EndNote library.

2.6. FAQs

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.

Taggin your references

- You can add tags to references and customise the colour and name of the tags.
- See Details: https://library-guides.ucl.ac.uk/endnote/tagging-references

See lot's of Tips & Tricks at Tennessee University Health Sciences Center:
University London https://library-guides.ucl.ac.uk/endnote
University Tennessee https://libguides.uthsc.edu/endnote

and on supports site of EndNote:
https://support.clarivate.com/s/?language=en_US

Contact & Support
Monika Wechsler, MSc. Biol.
Medical Information Specialist
monika.wechsler@unibas.ch

UNIVERSITÄT BASEL
UB Medizin
Spiegelgasse 5
https://ub.unibas.ch/de/ub-medizin/