

Introduction to EndNote

Utilizing Reference Manager Software

August 29, 2022

Partnering for Impact - Consortial Publications, Workshop #6



UNIVERSITY LIBRARIES
Health Sciences Library

Introductions

- Name
- Institution/Community organization and role
- Experience using reference management software
- Fun fact
- Please take a moment to add your information to the link in the chat

Presenter



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Health Librarian

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Today's Agenda

- **Background Information**
- **EndNote Basics (Live Demo)**
- **Cite While You Write (Live Demo)**
- **Resources and Wrap-Up**

Background information

Why use a citation manager?

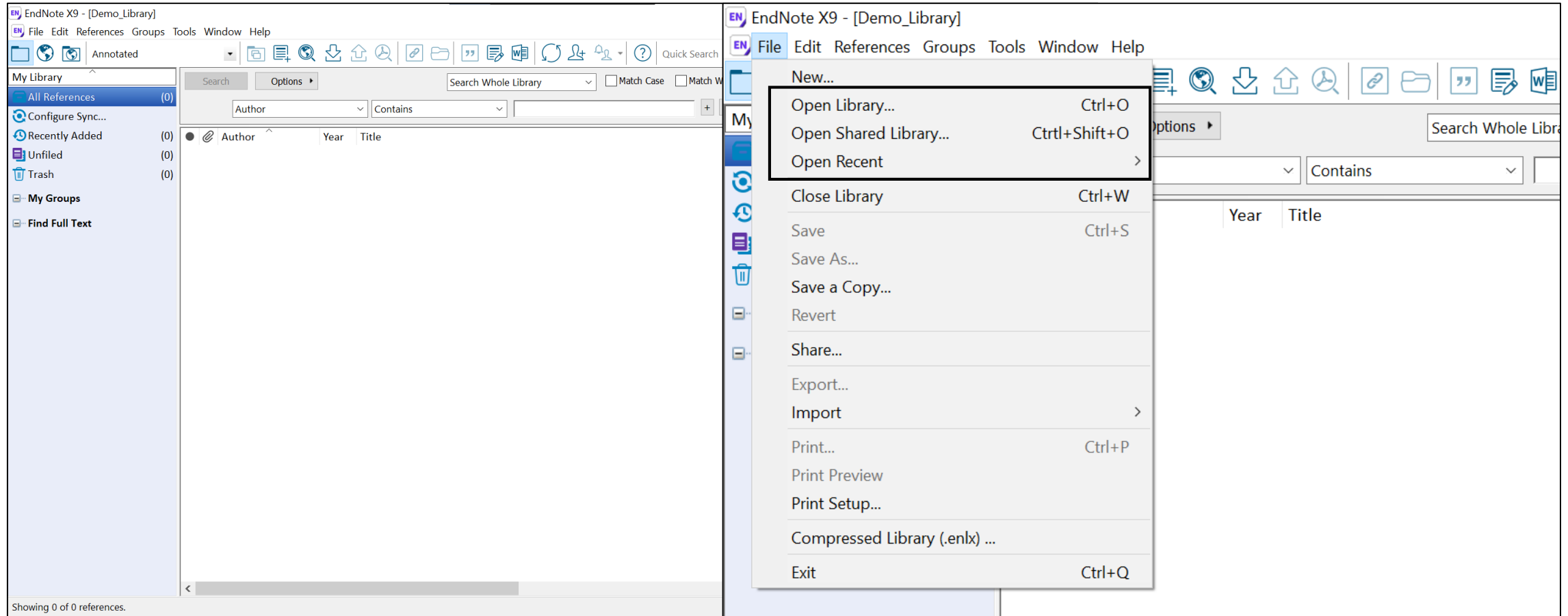
- **Citation managers can help you organize and share citations for ongoing research and professional development**
- **Citation managers also make citing literature and creating bibliographies much easier**

What is EndNote?

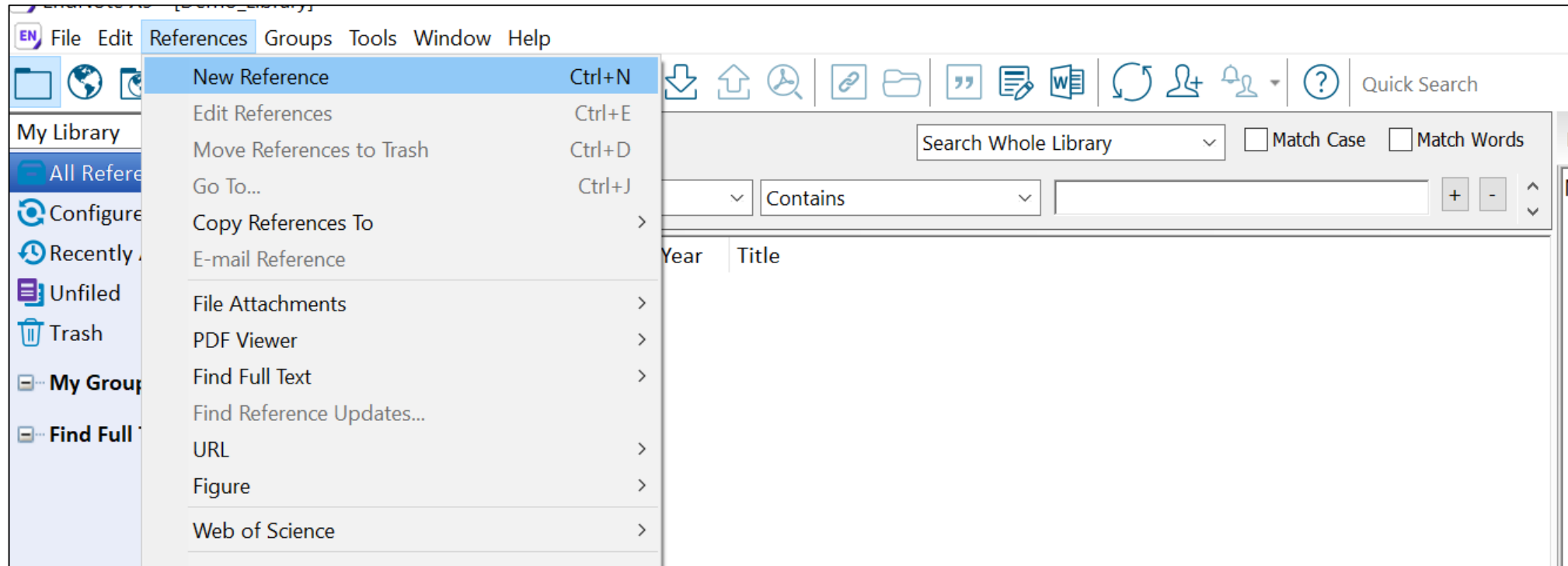
- **Create and maintain your own searchable database of literature references**
- **Centralize and organize your research information**
- **Insert citations into word processed documents**
- **Format references and bibliographies in a variety of styles**

Introduction to Basic Features of EndNote

Creating a Library or Opening Existing Library



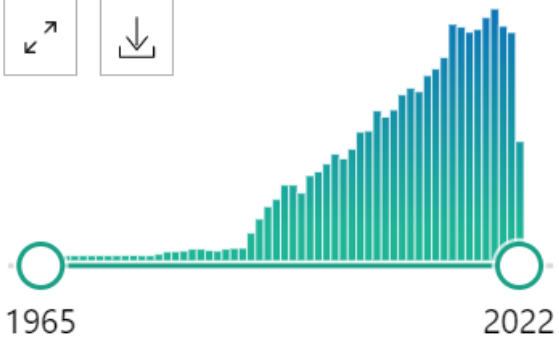
Adding References



Exporting References from PubMed

MY NCBI FILTERS 

RESULTS BY YEAR



TEXT AVAILABILITY

Abstract

Save Email Send to 3 items selected  Clear selection

Create a file for external citation management software

Selection:

Selection (3) 

All results on this page

All results

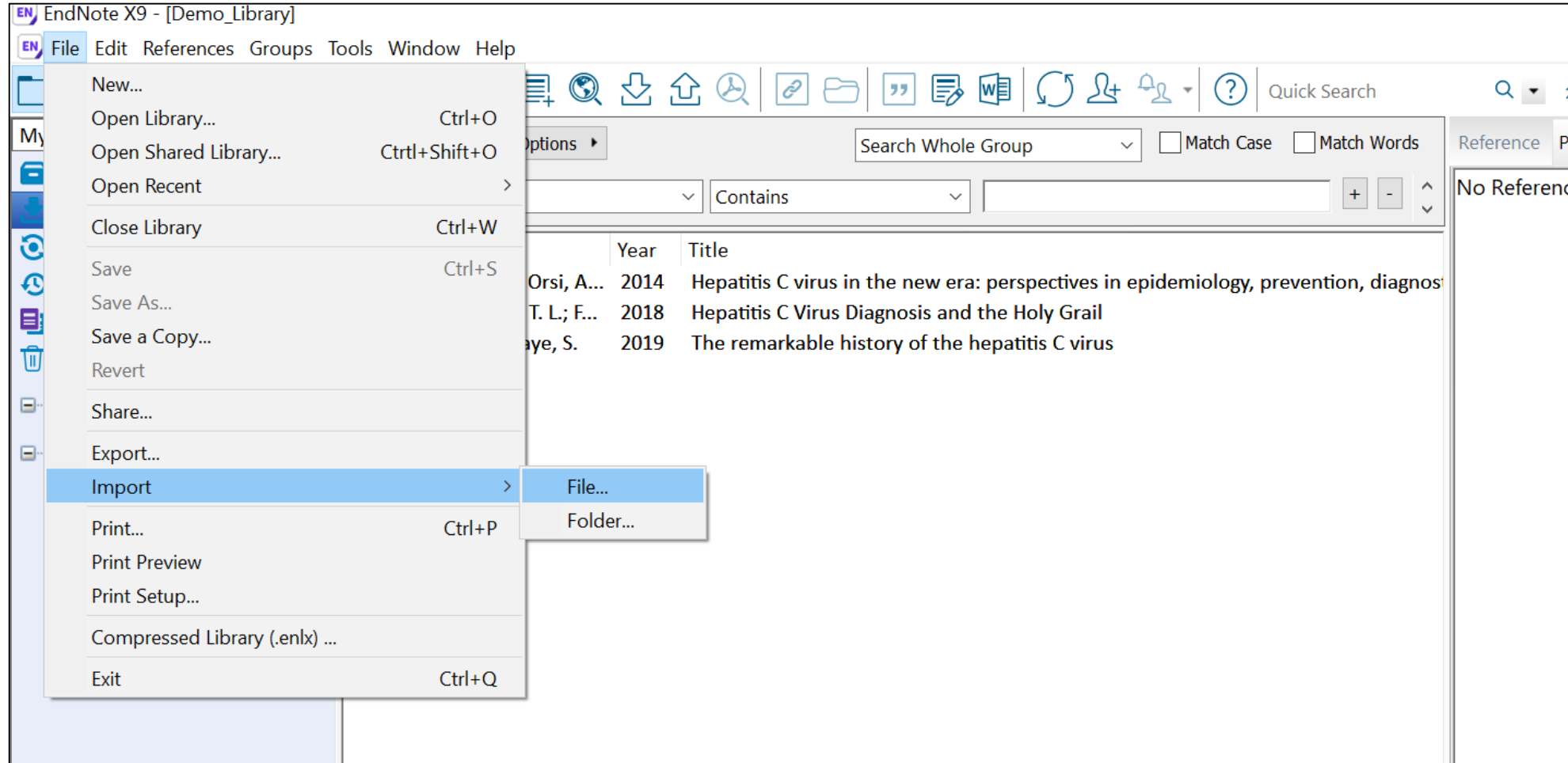
Selection (3)

2 [diagnostics and predictors of response to therapy.](#)

Cite Ansaldi F, Orsi A, Sticchi L, Bruzzone B, Icardi G.

explains the short 30 years from the virus discovery to the viral **hepatitis** elimination policy proposed by

Importing References into EndNote



Viewing References

The screenshot shows the EndNote X9 interface. The title bar reads "EndNote X9 - [Analdi, 2014 #6]". The menu bar includes "File", "Edit", "References", "Groups", "Tools", "Window", and "Help". The toolbar contains various icons for navigation and editing, including a "Reference" tab and "Attached PDFs" icon. The main editing area shows a reference entry for a "Journal Article".

Reference Type: Journal Article

Rating
.....

Author
Analdi, F.
Orsi, A.
Sticchi, L.
Bruzzone, B.
Icardi, G.

Year
2014

Title
Hepatitis C virus in the new era: perspectives in epidemiology, prevention, diagnostics and predictors of response to therapy

Journal
World J Gastroenterol

Volume
20

Part/Supplement

Issue
29

Pages
9633-52

Start Page

Errata

Epub Date
2014/08/12

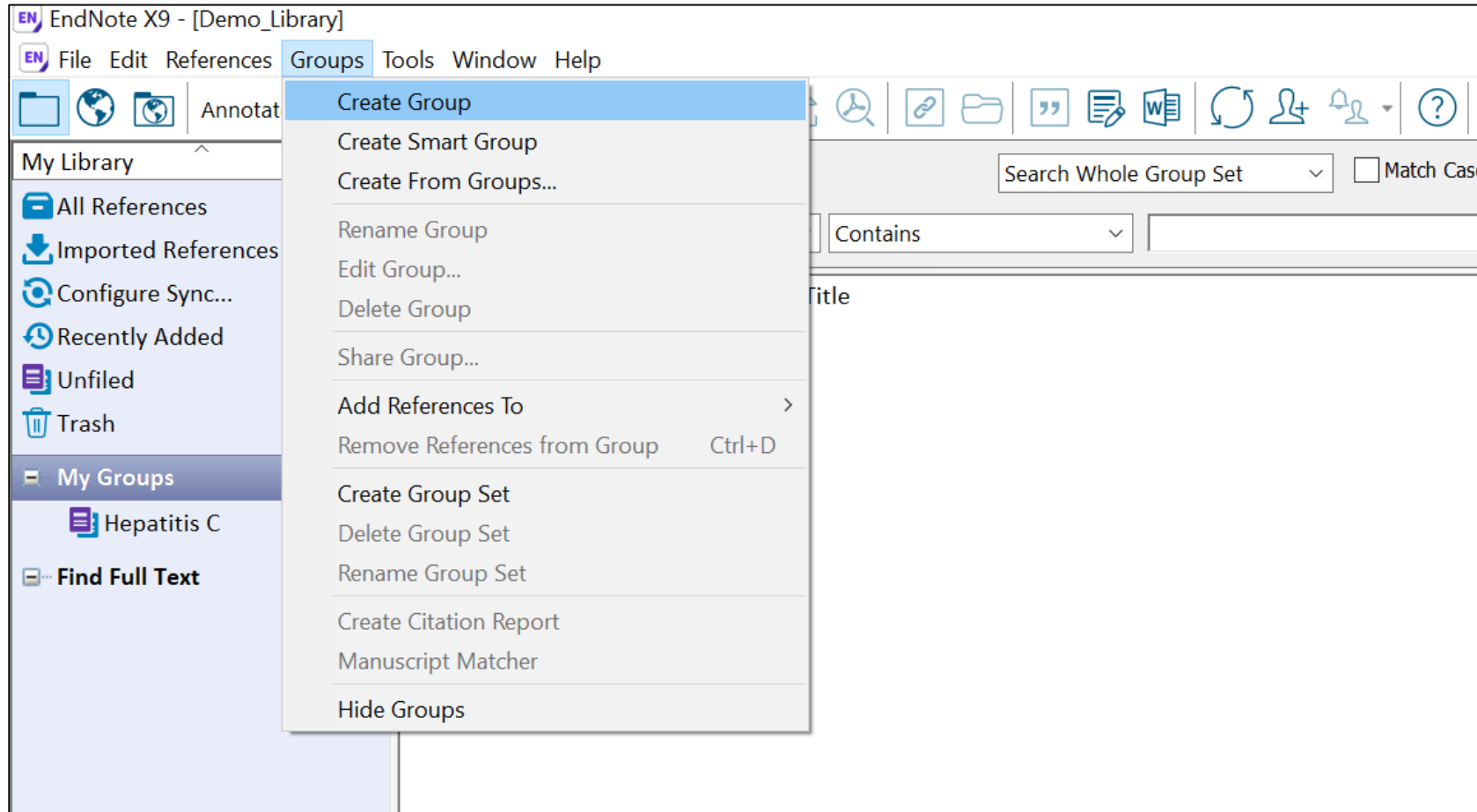
Date

Added to Library: 8/1/2022 Last Updated: 8/1/2022

Layout



Creating Groups



File Attachments

EndNote X9 - [Demo_Library]

File Edit References Groups Tools Window Help

Annotated

My Library

- All References (7)
- Imported References (3)
- Configure Sync...
- Recently Added (7)
- Unfiled (7)
- Trash (0)
- My Groups
 - Hepatitis C (0)
- Find Full Text

Search Options Search Whole Library Match Case Match Words

Author Contains

●	📎	Author	Year	Title
●		Ansaldi, F.; Orsi, A...	2014	Hepatitis C virus in the new era: perspectives in epidemiology, prevention, diagnos
○		Ansaldi, F.; Orsi, A...	2014	Hepatitis C virus in the new era: perspectives in epidemiology, prevention, diagnos
●		Applegate, T. L.; F...	2018	Hepatitis C Virus Diagnosis and the Holy Grail
●		Applegate, T. L.; F...	2018	Hepatitis C Virus Diagnosis and the Holy Grail
●		Applegate, T. L.; F...		Hepatitis C Virus Diagnosis and the Holy Grail
●		Pol, S.; Lagaye, S.	2019	The remarkable history of the hepatitis C virus
●		Pol, S.; Lagaye, S.	2019	The remarkable history of the hepatitis C virus

Reference Preview Attached PDFs Attach File...

Pol, S. and S. Lagaye (2019). "The remarkable history of the hepatitis C virus." *Genes Immun* **20**(5): 436-446.

The infection with the hepatitis C virus (HCV) is an example of the translational research success. The reciprocal interactions between clinicians and scientists have allowed in 30 years the initiation of empirical treatments by interferon, the discovery of the virus, the development of serological and virological tools for diagnosis but also for prognosis (the non-invasive biochemical or morphological fibrosis tests, the predictors of the specific immune response including genetic IL28B polymorphisms). Finally, well-tolerated and effective treatments with oral antivirals inhibiting HCV non-structural viral proteins involved in viral replication have been marketed this last decade, allowing the cure of all infected subjects. HCV chronic infection, which is a public health issue, is a hepatic disease, which may lead to a cirrhosis and an hepatocellular carcinoma (HCC) but also a

Removing Duplicates

EN Find Duplicates

Comparing 1 and 2 of 2 duplicates. Skip Cancel

Select the record to keep. The record not selected will be moved to the Trash. Select Skip to go to the next set of duplicates.

Keep This Record

Ansaldo, 2014 #2
Ref Type: Journal Article

Rating
• • • • •

Author
Ansaldo, F.
Orsi, A.
Sticchi, L.
Bruzzone, B.
Icardi, G.

Year
2014

Title
Hepatitis C virus in the new era: perspectives in epidemiology, prevention, diagnostics and predictors of response to therapy

Journal
World J Gastroenterol

Added to Library: 8/1/2022 Last Updated: 8/1/2022

Keep This Record

Ansaldo, 2014 #6
Ref Type: Journal Article

Rating
• • • • •

Author
Ansaldo, F.
Orsi, A.
Sticchi, L.
Bruzzone, B.
Icardi, G.

Year
2014

Title
Hepatitis C virus in the new era: perspectives in epidemiology, prevention, diagnostics and predictors of response to therapy

Journal
World J Gastroenterol

Added to Library: 8/1/2022 Last Updated: 8/1/2022

Changing Output Styles for References

The image consists of two side-by-side screenshots of the EndNote X9 software interface, demonstrating how to change the output style for references.

Left Screenshot: Shows the 'Edit' menu with 'Output Styles' selected. A sub-menu is open, listing various styles. 'Annotated' is currently selected with a checkmark. Other styles listed include APA 6th, APA 7th, Author-Date, Chicago 17th Footnote, MHRA (Author-Date), and NIH.

Right Screenshot: Shows the 'References' pane with a list of references. The 'Annotated' style is selected in the top right corner. A 'Select Another Style...' dialog box is open, showing a list of styles: Annotated, APA 6th, APA 7th, Author-Date, Chicago 17th Footnote, MHRA (Author-Date), NIH, Numbered, Show All Fields, Turabian 9th Footnote, and Vancouver. 'Annotated' is highlighted in blue.

Author	Year	Title
L, S.; Lagaye, S.	2019	The remarkable history of the
plegate, T. L.; F...		Hepatitis C Virus Diagnosis and
plegate, T. L.; F...	2018	Hepatitis C Virus Diagnosis and
saldi, F.; Orsi, A...	2014	Hepatitis C virus in the new er

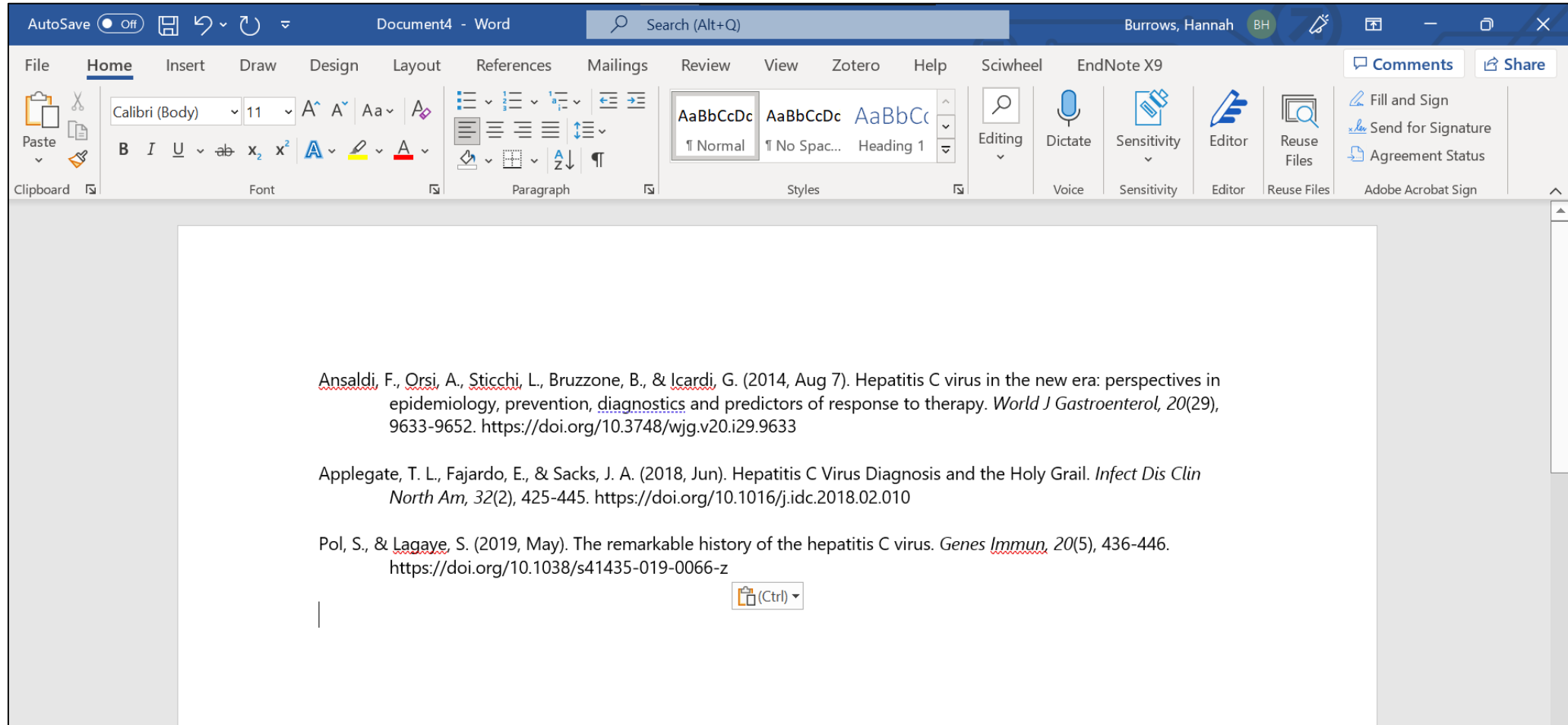
Saving and Sharing a Library

The image shows a software interface with two main components. On the left, a dialog box titled 'Compressed Library (.enlx)' is open, displaying options for creating and sharing a library. The options are:

- Create
- Create & E-mail
- All References in Library:
- Selected Reference(s)
- All References in Group/Group

On the right, an email client window titled 'Untitled - Message (HTML)' is visible. The window shows a message composition interface with a menu bar (File, Message, Insert, Options, Format Text, Review, Help) and a toolbar. The 'Message' menu is active, showing options for font (Calibri (Body)), size (11), bold (B), italic (I), underline (U), text color (A), and background color. The 'To' and 'Cc' fields are empty, and the 'Subject' field is also empty. A file attachment is shown as 'Demo_Library.enlx' (696 KB).

Creating a Bibliography



The screenshot shows the Microsoft Word interface with the following elements:

- Top Bar:** AutoSave (Off), Document4 - Word, Search (Alt+Q), Burrows, Hannah BH, and window control buttons.
- Menu Bar:** File, Home, Insert, Draw, Design, Layout, References, Mailings, Review, View, Zotero, Help, Sciwheel, EndNote X9, Comments, and Share.
- Home Tab Ribbon:**
 - Clipboard:** Paste.
 - Font:** Calibri (Body), 11, Bold (B), Italic (I), Underline (U), Text Color (A), Background Color (A), Font Color (A).
 - Paragraph:** Bulleted List, Numbered List, Decrease Indent, Increase Indent, Paragraph Spacing, Paragraph Styles.
 - Styles:** AaBbCcDc, AaBbCcDc, AaBbCc, Normal, No Spac..., Heading 1.
 - Editing:** Editing, Dictate, Sensitivity, Editor, Reuse Files, Adobe Acrobat Sign.
- Main Document Area:**

Ansaldi, F., Orsi, A., Sticchi, L., Bruzzone, B., & Icardi, G. (2014, Aug 7). Hepatitis C virus in the new era: perspectives in epidemiology, prevention, diagnostics and predictors of response to therapy. *World J Gastroenterol*, 20(29), 9633-9652. <https://doi.org/10.3748/wjg.v20.i29.9633>

Applegate, T. L., Fajardo, E., & Sacks, J. A. (2018, Jun). Hepatitis C Virus Diagnosis and the Holy Grail. *Infect Dis Clin North Am*, 32(2), 425-445. <https://doi.org/10.1016/j.idc.2018.02.010>

Pol, S., & Lagaye, S. (2019, May). The remarkable history of the hepatitis C virus. *Genes Immun*, 20(5), 436-446. <https://doi.org/10.1038/s41435-019-0066-z>

Using EndNote to 'Cite While You Write'

Cite While You Write

- **Why Use Cite While You Write (CWYW)?**

- Allows you to use your EndNote references to insert citations in a Microsoft Word document
- Automatically creates a bibliography from the inserted citations
- Allows you to change the format of your citations and bibliography

- **How do I get Cite While Your Write (CWYW)?**

- Need to have Microsoft Word installed on your computer *before* you install EndNote
- When you install EndNote on your computer, an EndNote menu is automatically added to your Microsoft Word toolbar

Inserting Citations

The screenshot shows a software interface for inserting citations. At the top, there is a menu bar with 'Tools', 'Window', and 'Help'. Below the menu is a toolbar with various icons for file operations and search. A search bar is visible with the text 'Search Whole Library' and options for 'Match Case' and 'Match Words'. Below the search bar, there is a search criteria dropdown set to 'Author' and a search operator dropdown set to 'Contains'. The main area displays a table of search results with columns for 'Author', 'Year', and 'Title'. The fourth row is highlighted in blue.

	Author	Year	Title
(0)	Pol, S.; Lagaye, S.	2019	The remarkable history of the hepatitis C virus
(4)	Applegate, T. L.; F...		Hepatitis C Virus Diagnosis and the Holy Grail
(4)	Applegate, T. L.; F...	2018	Hepatitis C Virus Diagnosis and the Holy Grail
(4)	Ansaldi, F.; Orsi, A...	2014	Hepatitis C virus in the new era: perspectives in epidemiology, prevention, diagnosis

Edit Formatted Citations

EndNote X9 Edit & Manage Citations

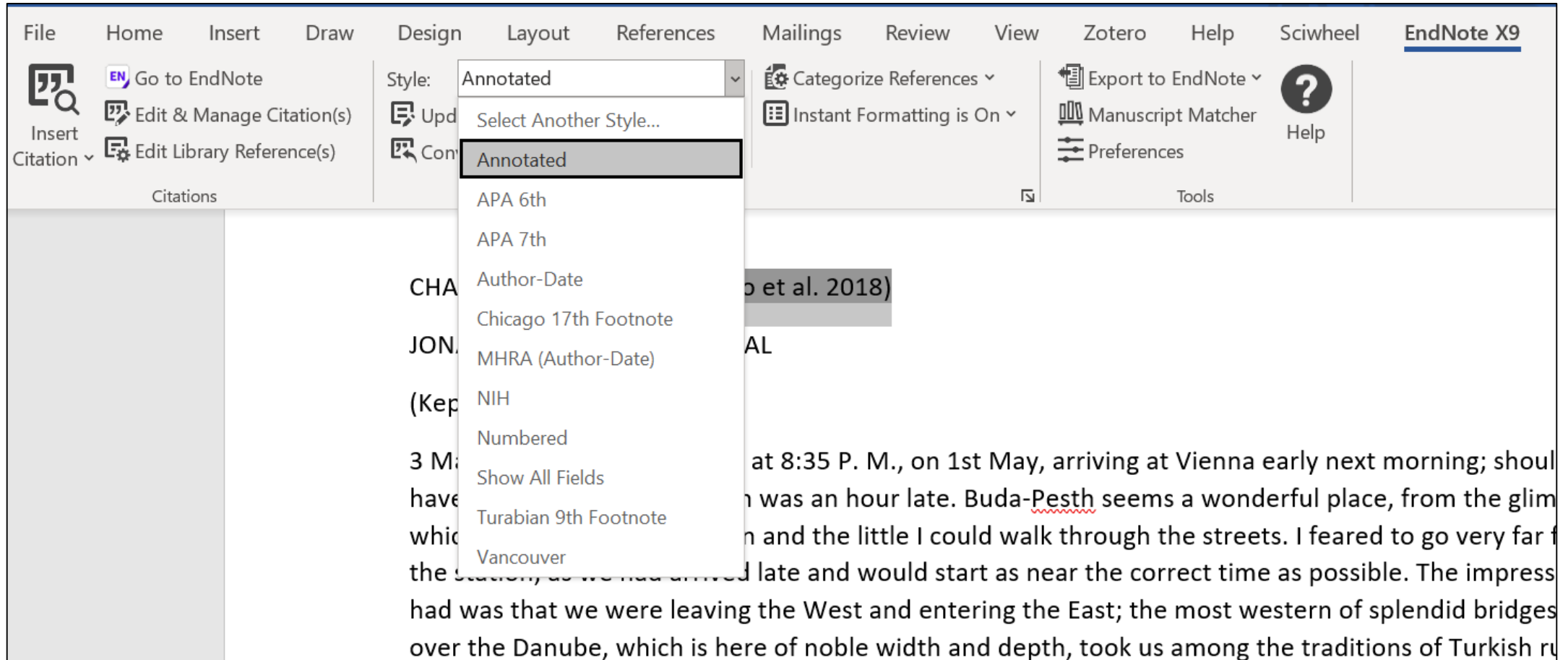
Citation	Count	Library
(Applegate, Fajardo et al. 2018)		
Applegate, 2018 #1	2	Demo_Library
Applegate, Fajardo et al. (2018)		
Applegate, 2018 #1@@a...	2	Demo_Library

Context menu options:

- Edit Library Reference
- Find Reference Updates...
- Remove Citation
- Insert Citation
- Update from My Library...

ong the books and maps in the library regarding Transylvania; it had struck me that som

Change Output Style within Word



The screenshot shows the Microsoft Word ribbon with the 'References' tab selected. The 'Citations' group is active, and the 'Style' dropdown menu is open, showing a list of citation styles. The 'Annotated' style is currently selected and highlighted. Other styles visible in the list include APA 6th, APA 7th, Author-Date, Chicago 17th Footnote, MHRA (Author-Date), NIH, Numbered, Show All Fields, Turabian 9th Footnote, and Vancouver. The background text in the document is partially visible, showing a citation '(Ke... et al. 2018)' and a paragraph of text starting with 'at 8:35 P. M., on 1st May, arriving at Vienna early next morning; should have been an hour late. Buda-Pesth seems a wonderful place, from the glimpse and the little I could walk through the streets. I feared to go very far from the station, as we had arrived late and would start as near the correct time as possible. The impression had was that we were leaving the West and entering the East; the most western of splendid bridges over the Danube, which is here of noble width and depth, took us among the traditions of Turkish ru'.

Resources and Wrap-Up

UNC Resources for Citation Management

- [UNC Guide to Choosing a Citation Manager](#)
- [UNC Guide to EndNote Basic and Online](#)
- [UNC Guide to EndNote Desktop](#)
- [UNC Guide to SciWheel](#) (supported by HSL)
- [UNC Guide to Zotero](#) (not supported by HSL)

Other Resources for Citation Management

- [Clarivate LibGuide for EndNote](#)
- [EndNoteTraining YouTube Channel](#)
- [EndNote Training Resources](#)
- [SciWheel 'How To' Videos](#)
- [Zotero Quick Start Guide](#)

Questions?

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Workshop Series List

- #1 Consortial Publication Process (5/17/22)
- #2 Data Dashboard/Available Data (5/24/22)
- #3 Choosing a Peer-Reviewed Journal (8/08/22)
- #4 Submitting Your Manuscript (8/15/22)
- #5 Search Engines – The Basics (8/25/22)
- #6 Reference Management Software (8/29/22)**
- #7 Writing the “Introduction” (9/12/22)**
- #8 Writing the “Methods” (9/19/22)**
- #9 Writing the “Results” (9/26/22)**
- #10 Writing the “Discussion” (10/3/22)**