Mahidol University
Faculty of Science
Stang Mongkolsuk Library
and Information Division

Stang Library Training

EndNote 21 for Windows

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3 April 2024

Introduction

- What is EndNote?
- How EndNote works
- Compatibility and System Requirements
- Download Endnote Software

What is EndNote?

Reference management software

- Developed by Clarivate Analytics

Personal Reference database

- Storing, managing, and searching for bibliographic references in your private reference library

Bibliography and manuscript maker

- Formats citations in Microsoft Word with the Cite While You Write™ feature

How EndNote Works

Books, Journals, Research Articles, E-database, etc.

Create bibliography

Report, Manuscript, Thesis, etc.

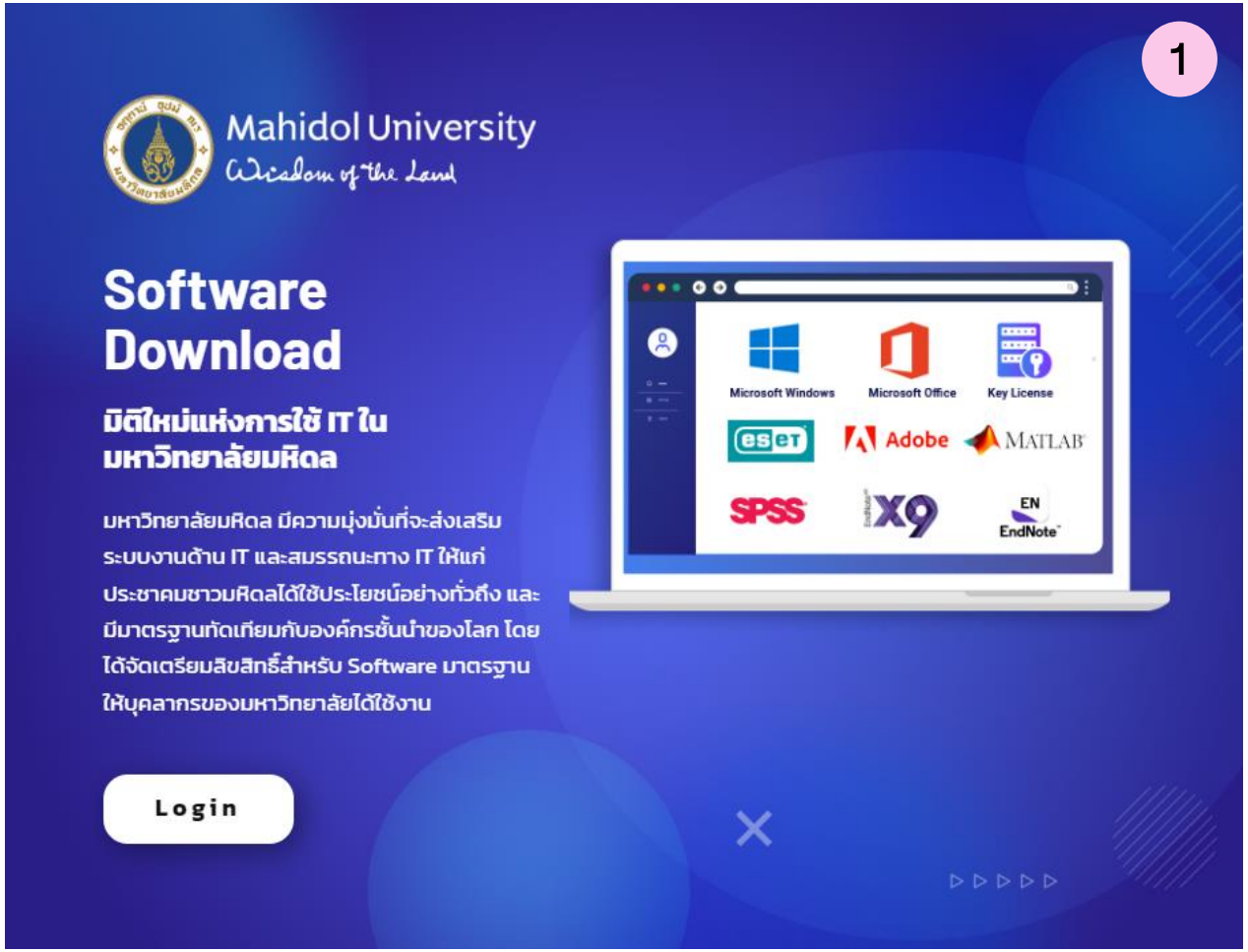
Compatibility and System Requirements

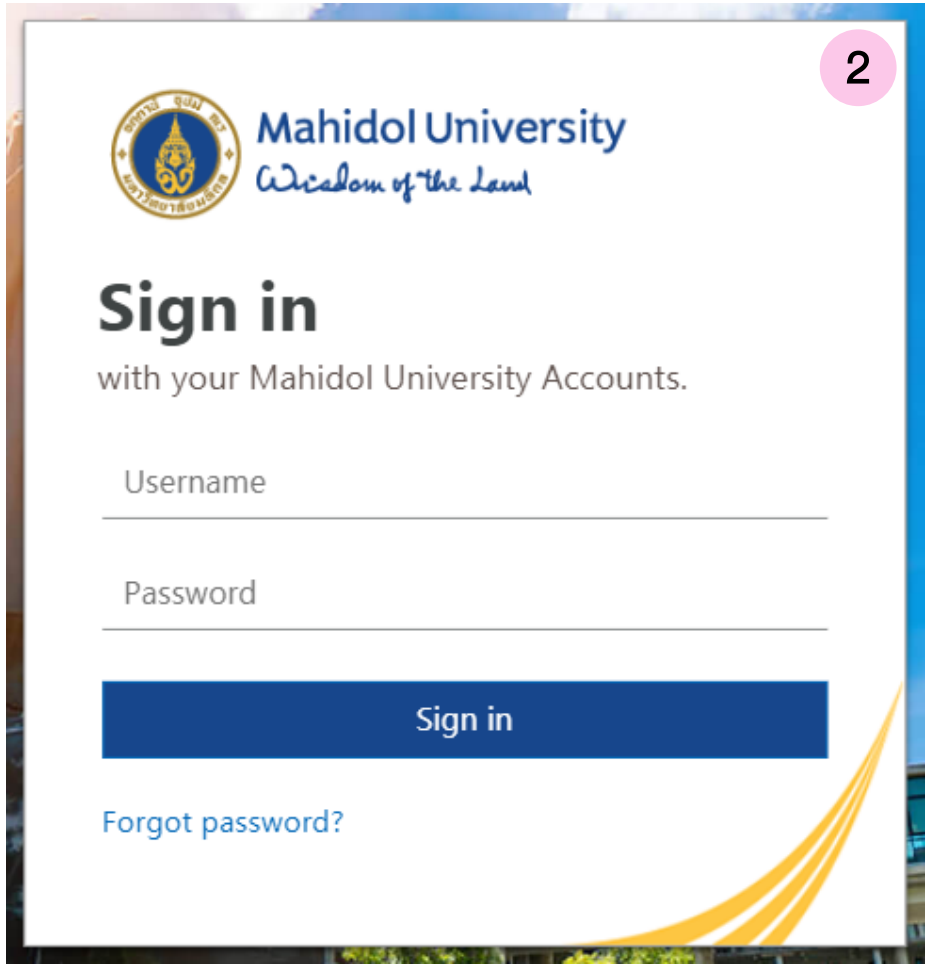
Operating System	Version	Word processor software
Windows	• Windows 10 • Windows 11	Microsoft Word [CWYW] : • 2010 • 2013 • 2016 • 2019 • Office 365 (locally installed desktop version only)
Macintosh	• macOS 10.14 • macOS 10.15 • macOS 11 • macOS 12 • macOS 13	Microsoft Word [CWYW] : • 2016 • 2019 • Office 365 (locally installed desktop version only)

https://endnote.com/product-details/compatibility

Download Endnote Software (1)

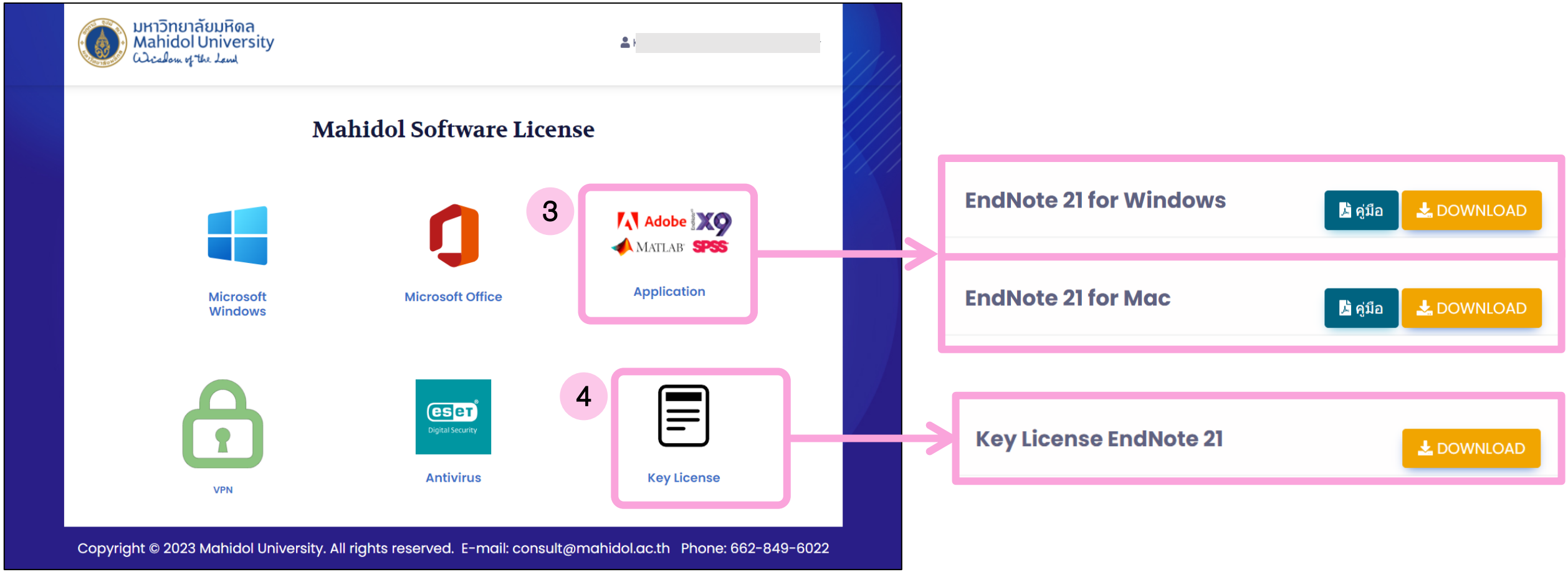
1. Go to https://softwaredownload.mahidol.ac.th/ (Access through MU-WiFi or VPN)
2. Login with MU Internet account





Download Endnote Software (2)

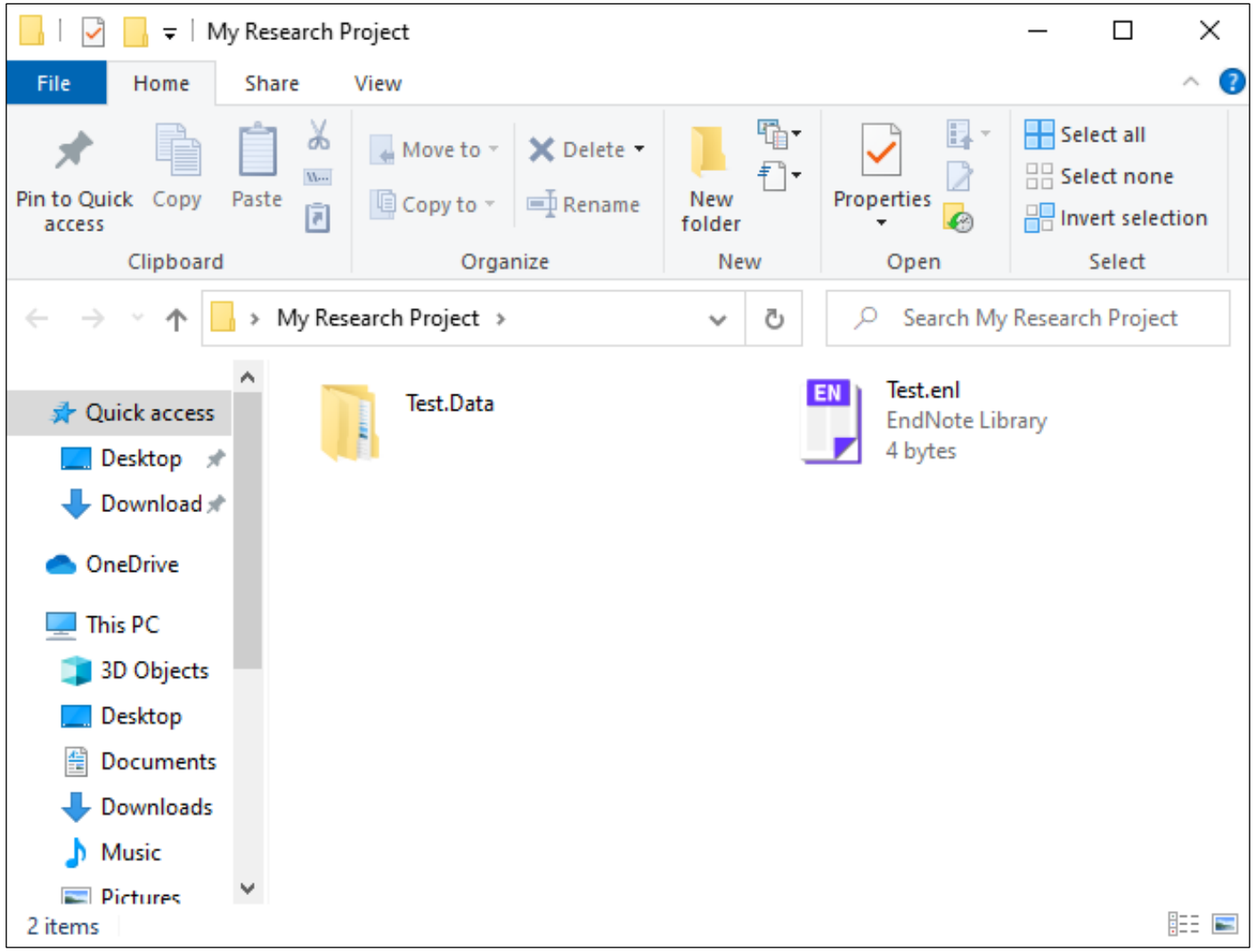
3. Download an installer compatible with your operating system. (Windows or Mac)
4. Download EndNote key license



Get Started with EndNote

- EndNote Library components
- Creating a New Library
- Library Overview
- Journal Term Lists

EndNote Library components



- EndNote libraries are made up of two parts:
  - EndNote Library file (*.enl)
  - Data folder (*.Data)

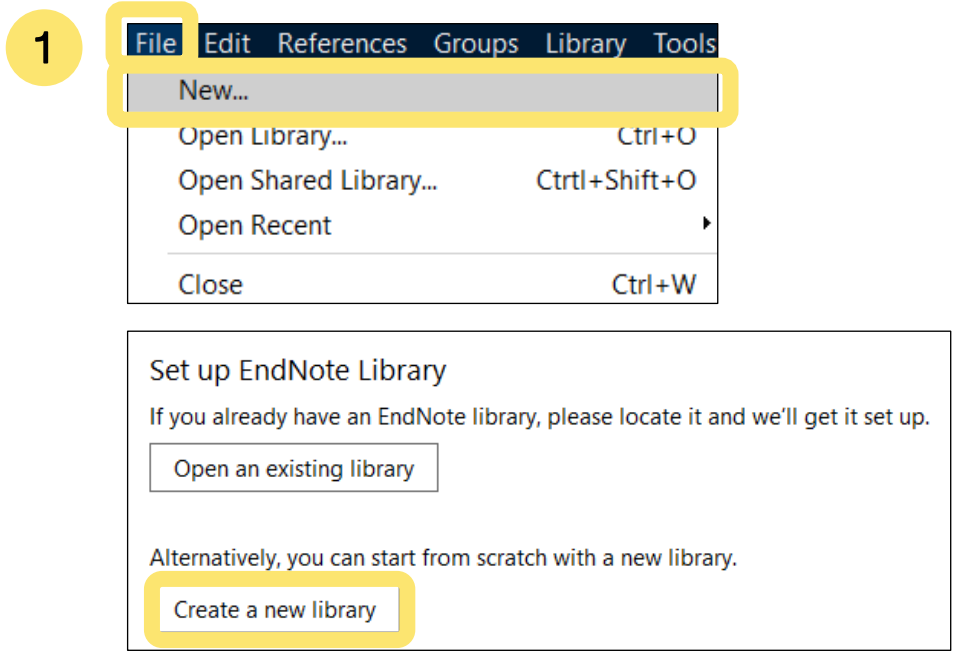
  These two parts must be kept together to work correctly.

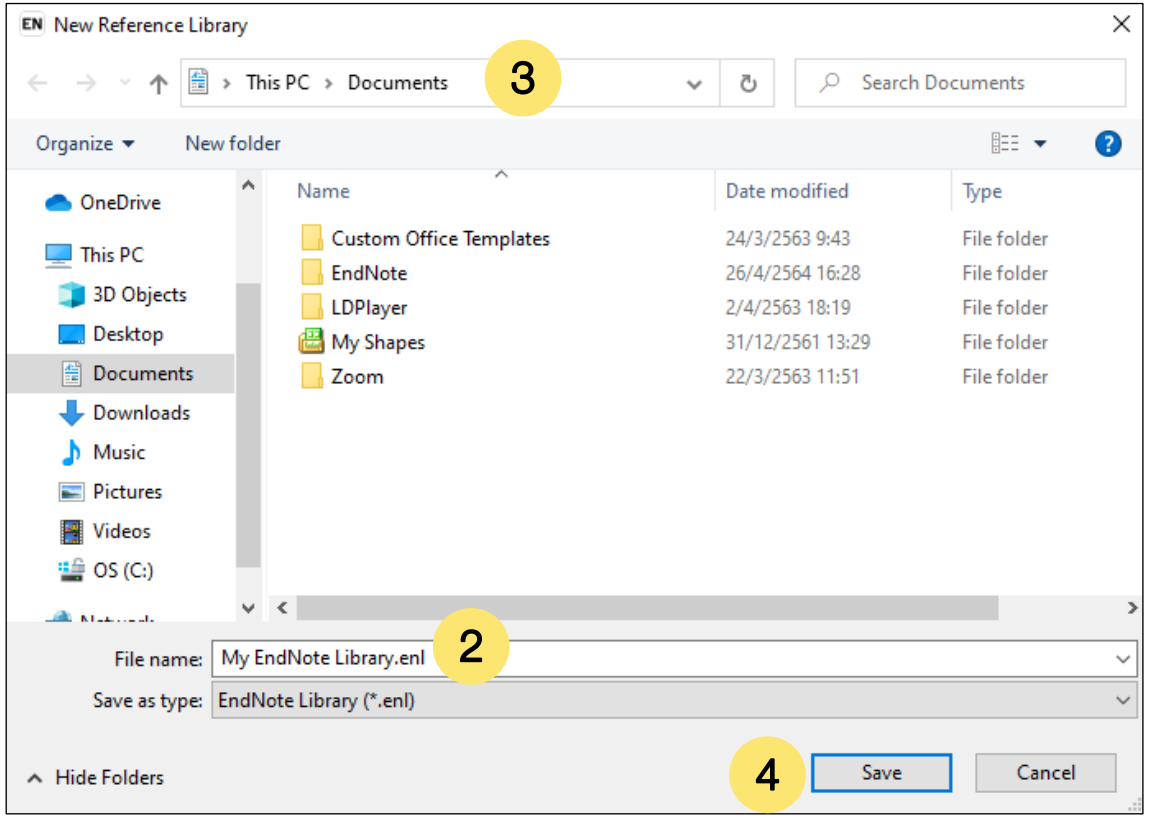
- Keep EndNote libraries on your computer's local hard drive. Storing and editing libraries on a network drive can lead to corruption and performance issues.

- EndNote libraries should never be stored in cloud-syncing folders such as Google Drive, OneDrive, etc. Syncing folders corrupt EndNote libraries over time.

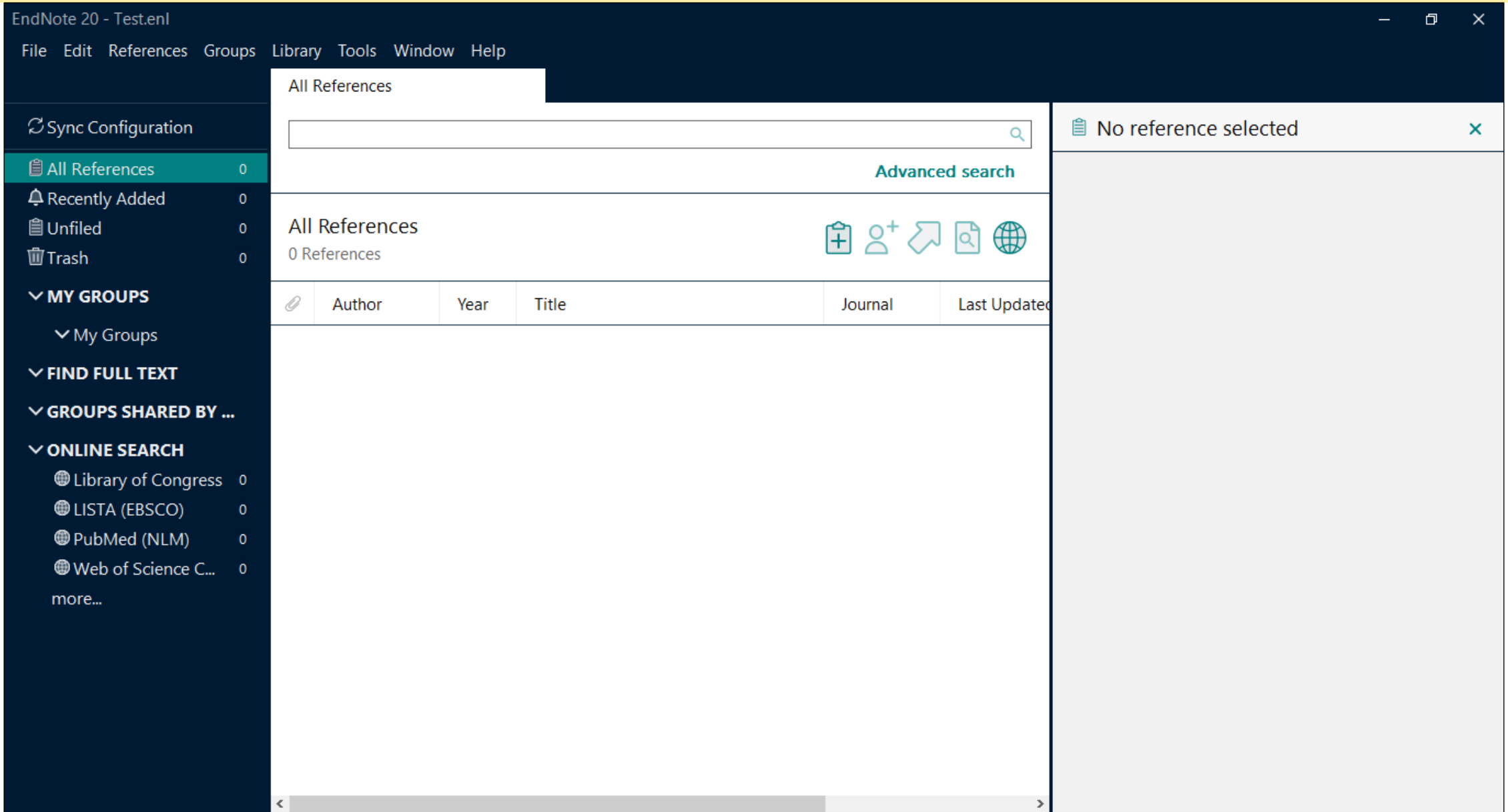
Creating a New Library

1. Go to **File > New…** or select **Creating a New Library** from Set up Endnote Library box.
2. EndNote presents a dialog prompting you to enter a name for your new library.
3. Select the location where you will save the library.
4. Click **Save**, then the new Endnote library appears as an empty library.





Library Overview



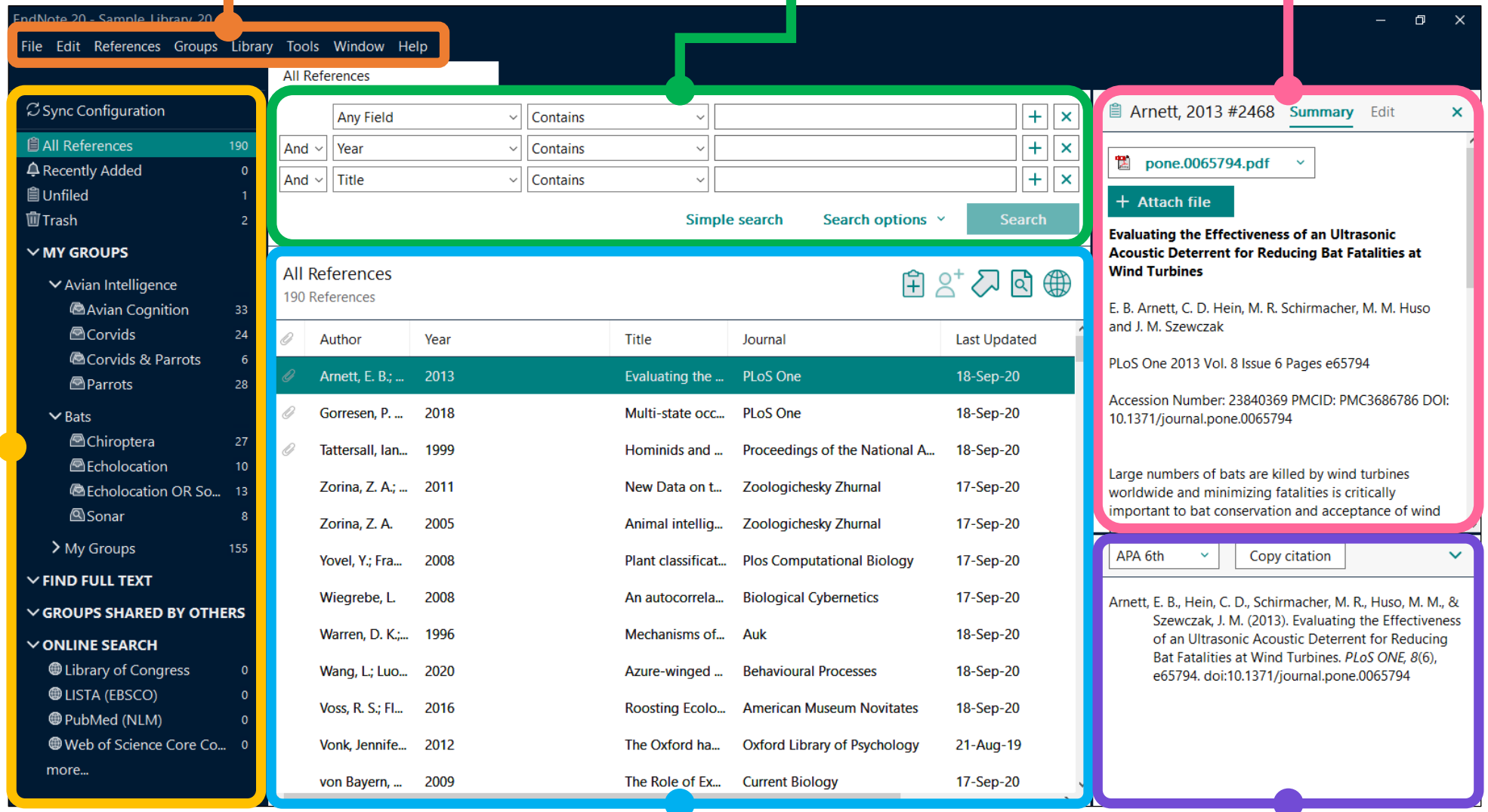
Library Overview

Menu Bar

Search panel to find an item in your library or to query a remote database for new references to capture.

Groups panel shows you both default groups and groups or group sets that you create for your research projects.

Tab panel Summary tab displays a detailed overview of a selected reference. Quickly alter reference metadata from the Edit tab.



Reference List panel shows the individual references stored in your EndNote library, also known as library records.

Preview panel shows you how a reference would appear formatted with a specific output style.

Journal Term Lists

Journal Term Lists is lists of journal name in full and abbreviated form.

- These lists are used for making correct journal name in reference format.
- Help EndNote works correctly find out the duplicate references.

Recently Added

2 References

Author	Year	Title	Journal
Li, Zhuo; Hirst, Jonathan D.	2020	Computed optical spectra of SARS-CoV-2 proteins	Chemical Physics Letters
Li, Z.; Hirst, J. D.	2020	Computed optical spectra of SARS-CoV-2 proteins	Chem Phys Lett

*ScienceDirect** give full journal name

*PubMed** give abbreviated journal name

**Retrieving reference from various sources may give the journal name in different form.*

Before & After defining Journal Term Lists

ScienceDirect

Give full journal name

Before

Vancouver | Insert | Copy

1. Li Z, Hirst JD. Computed optical spectra of SARS-CoV-2 proteins. Chemical Physics Letters. 2020;758:137935.

After

Vancouver | Insert | Copy

1. Li Z, Hirst JD. Computed optical spectra of SARS-CoV-2 proteins. Chem Phys Lett. 2020;758:137935.

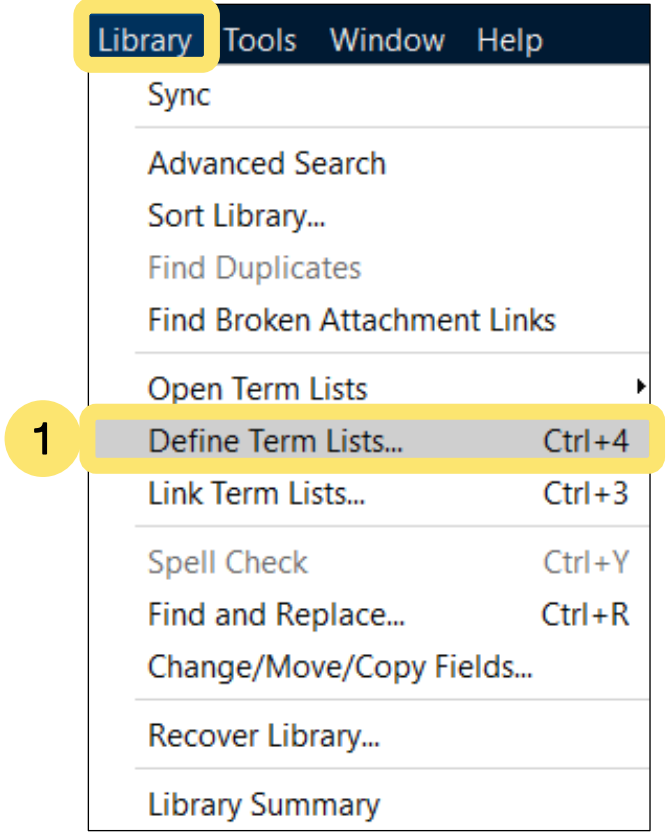
Vancouver Style use the abbreviated journal name

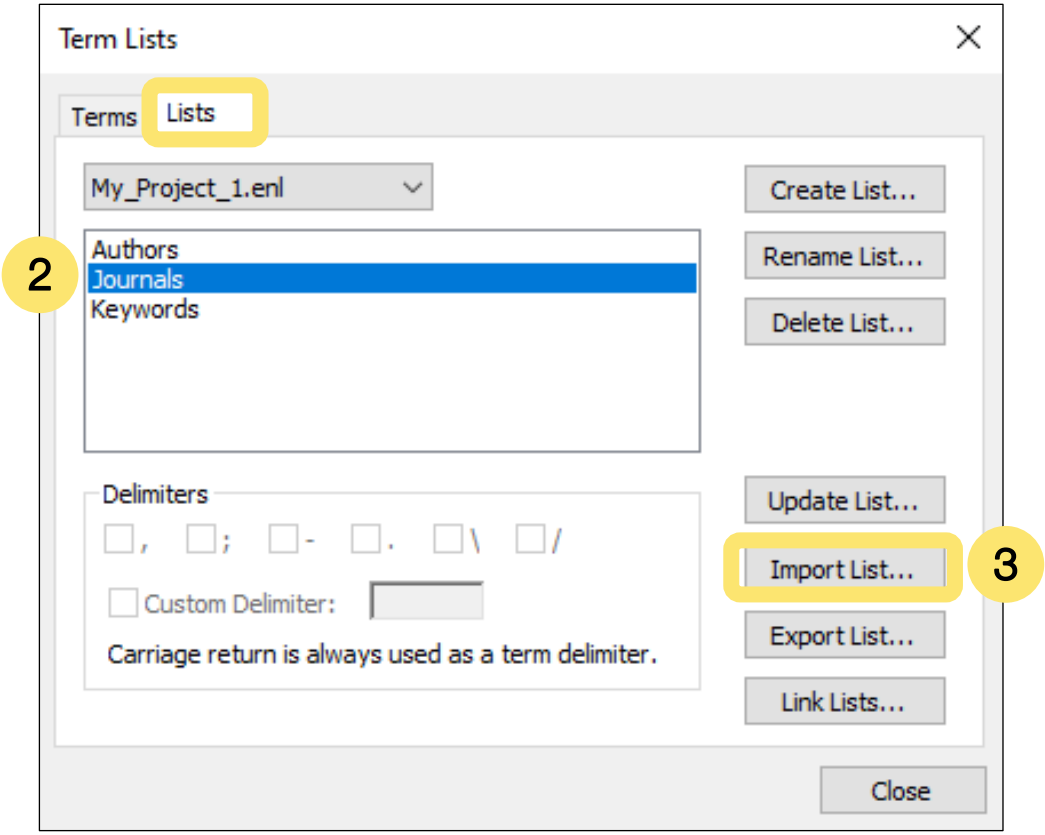
Define Journal Term Lists (1)

1. Go to **Library > Define Term Lists…**

2. In the Term Lists box, select tab **Lists**, then select **Journals**

3. Click at **Import List…**



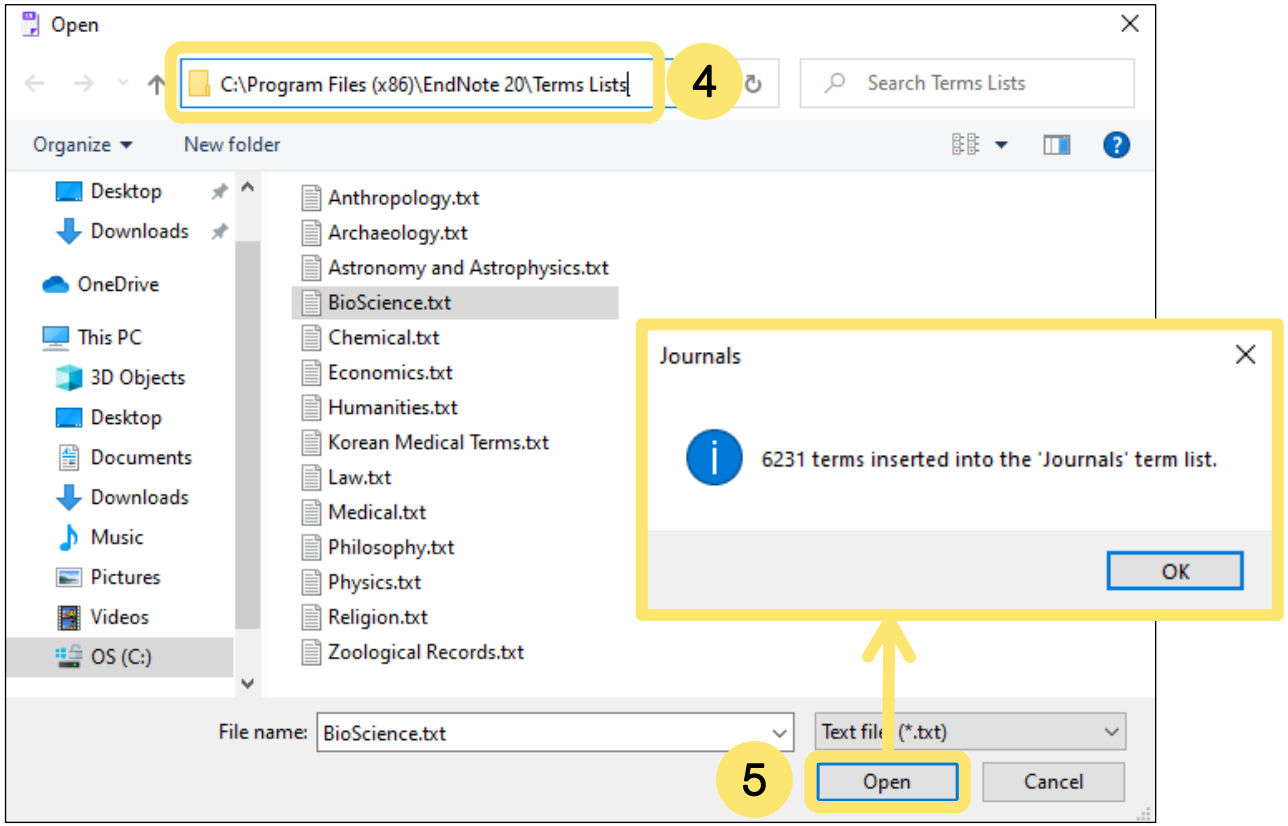


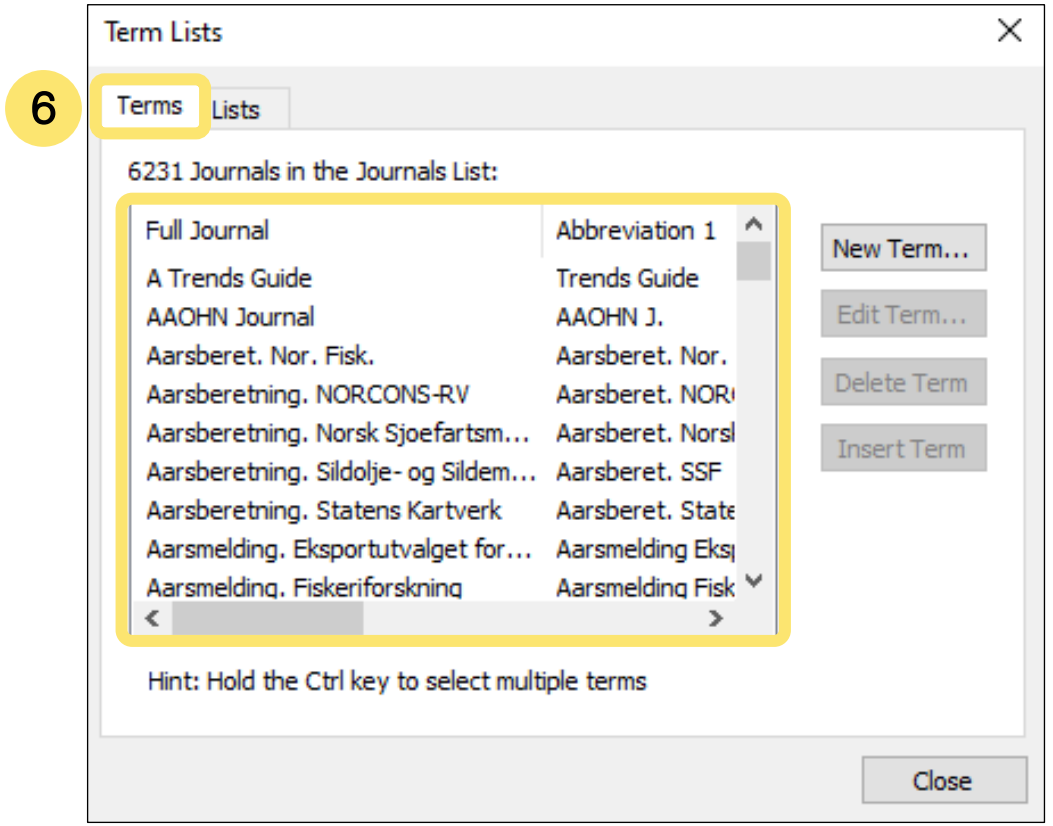
Define Journal Term Lists (2)

4. Browse to **C:\Program Files (x86)\EndNote 21\Terms Lists**

5. Choose the appropriated term lists files (e.g. BioScience.txt), then click **Open** to completed.

6. Select tab **Terms** to view the imported journal lists, then close.





Input Data

- Direct Export
- Import PDF
- Manual Typing

Direct Export

ScienceDirect

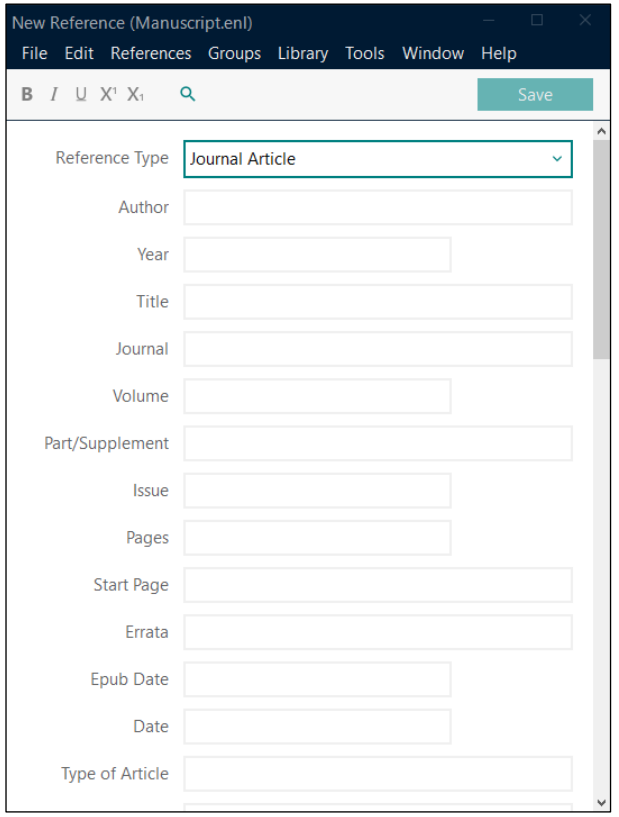
PubMed

Scopus®

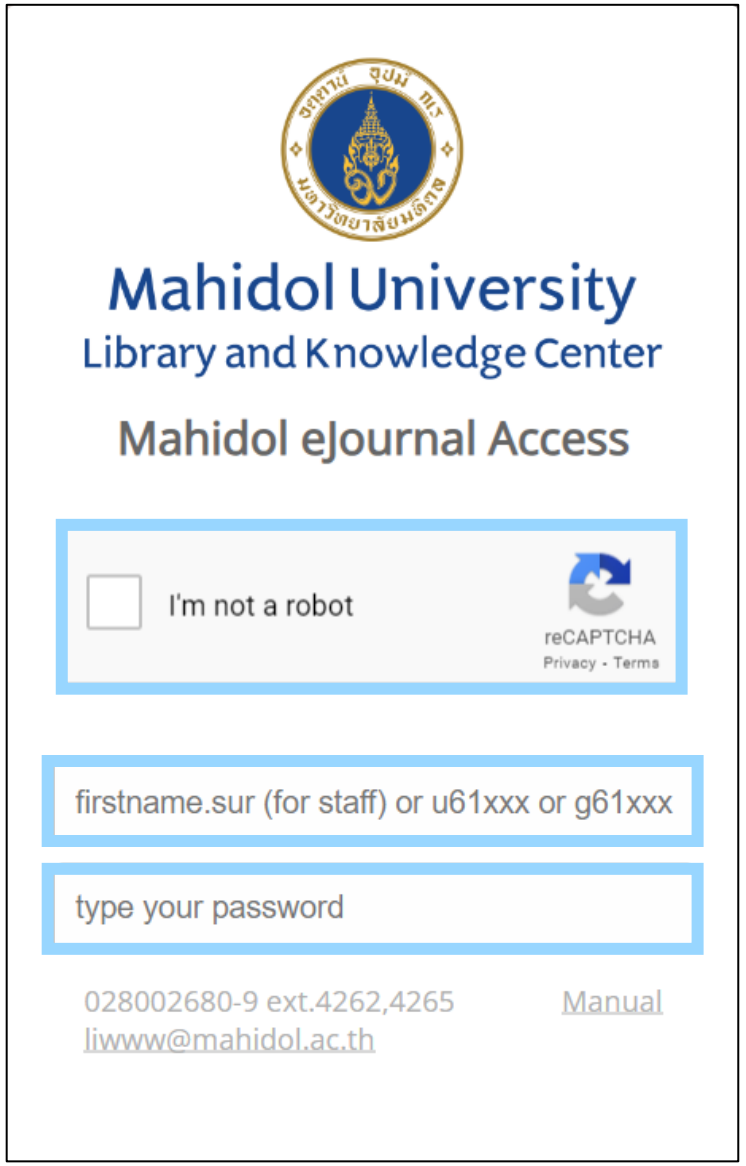
Google Scholar

Import PDF

Manual Typing



Mahidol eJournal Access (EZproxy)

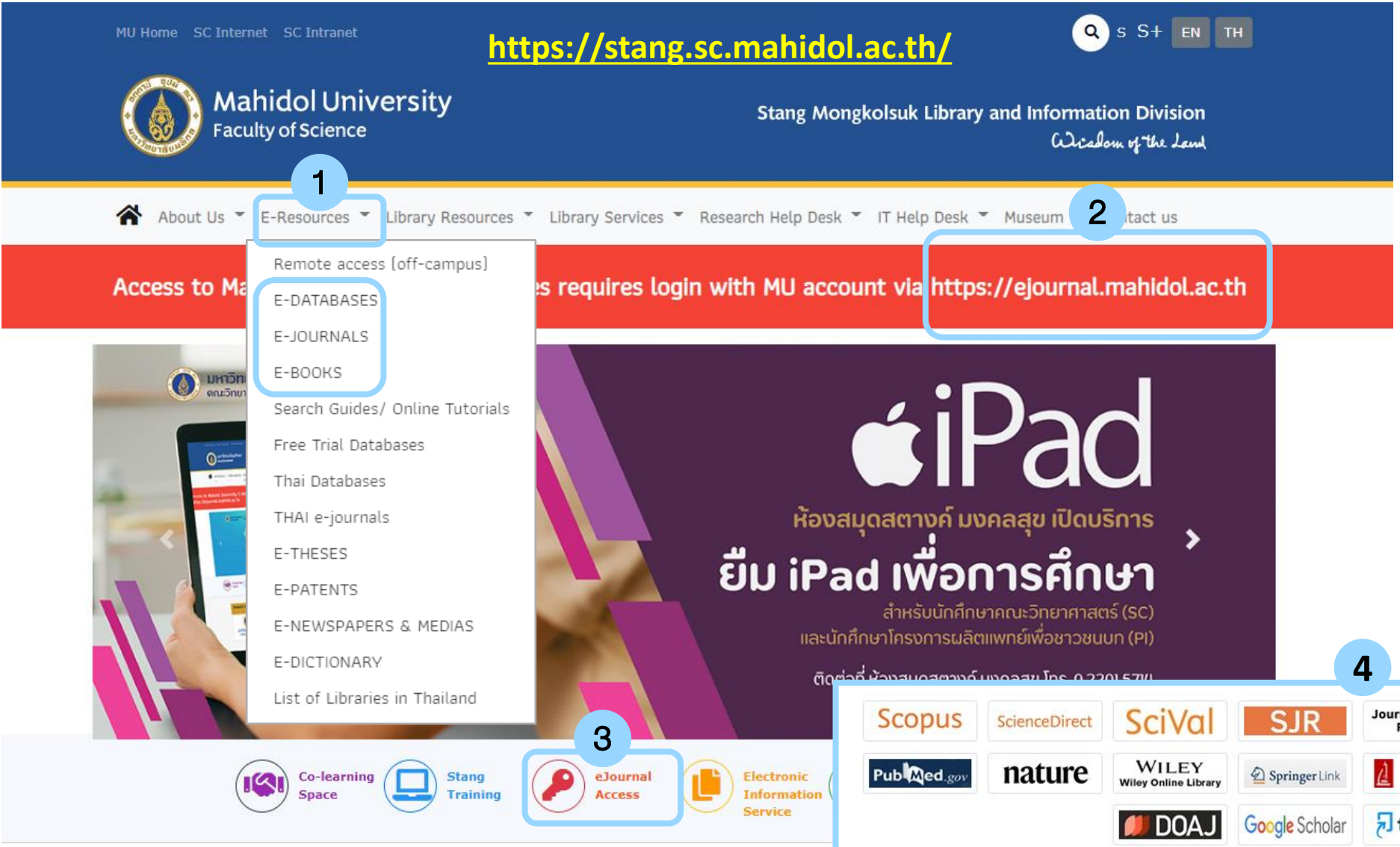


- URL: https://ejournal.mahidol.ac.th
- Login with MU Internet account to access subscribed e-resource
- Support all devices all operating systems (Windows, MacIntosh and Linux), smart phone and tablet with iOS (iPhone / iPad) and Android

***** Limitation *****

Must follow the links given in library's website

Mahidol eJournal Access (EZproxy)



You can access by

1. Select menu E-Resources to find appropriated E-Databases, E-Journals or E-Books
2. Click URL from the top of webpage
3. Click eJournal Access button
4. Select appropriated E-databases from bottom of webpage

Direct export: ScienceDirect

ScienceDirect

1. Mark the records you need.
2. Click **Export** at the top of search results.
3. Select **Export citation to RIS** to input data to your library.

Find articles with these terms

Coronavirus

Advanced search

45,746 results

Set search alert

Refine by:

Subscribed journals

Years

2022 (10)

2021 (12,137)

2020 (19,913)

Show more

1

2

Download 25 articles

Export

ed by *relevance* | date

Short communication

Prior and novel coronaviruses, Coronavirus Disease 20 ction: what is known?

Fertility and Sterility, 16 April 2020, ...

ames Segars, Quinton Katler, ... Jennifer F. Kawwass

Abstract Extracts Export

Research article Full text access

In-hospital cardiac arrest in patients with coronavirus 2019

Resuscitation, 27 January 2021, ...

Oscar J. L. Mitchell, Eugene Yuriditsky, ... Benjamin S. Abella

Download PDF Abstract Extracts Export

Export

25 citations selected

Save to RefWorks

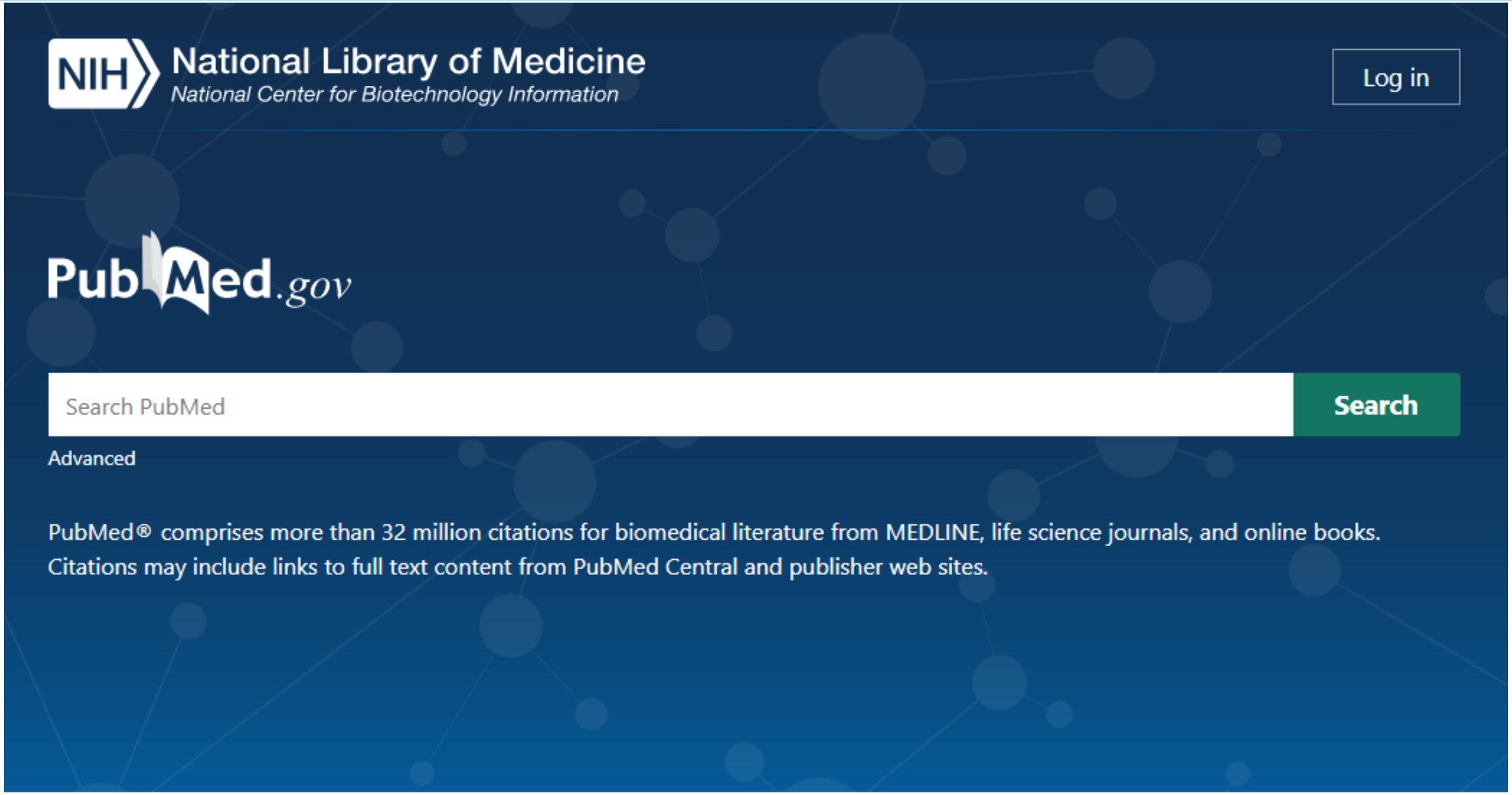
Export citation to RIS

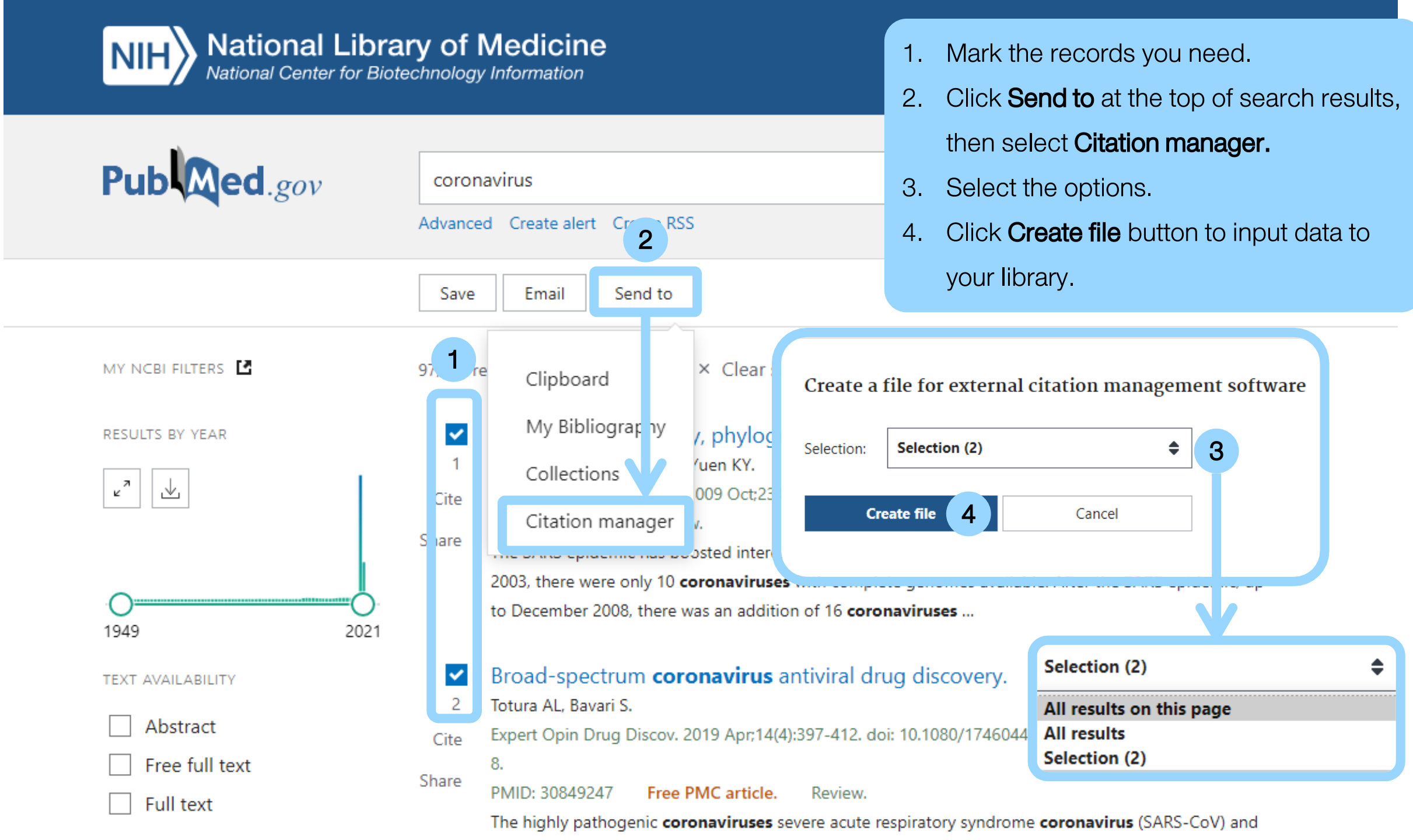
3

Export citation to BibTeX

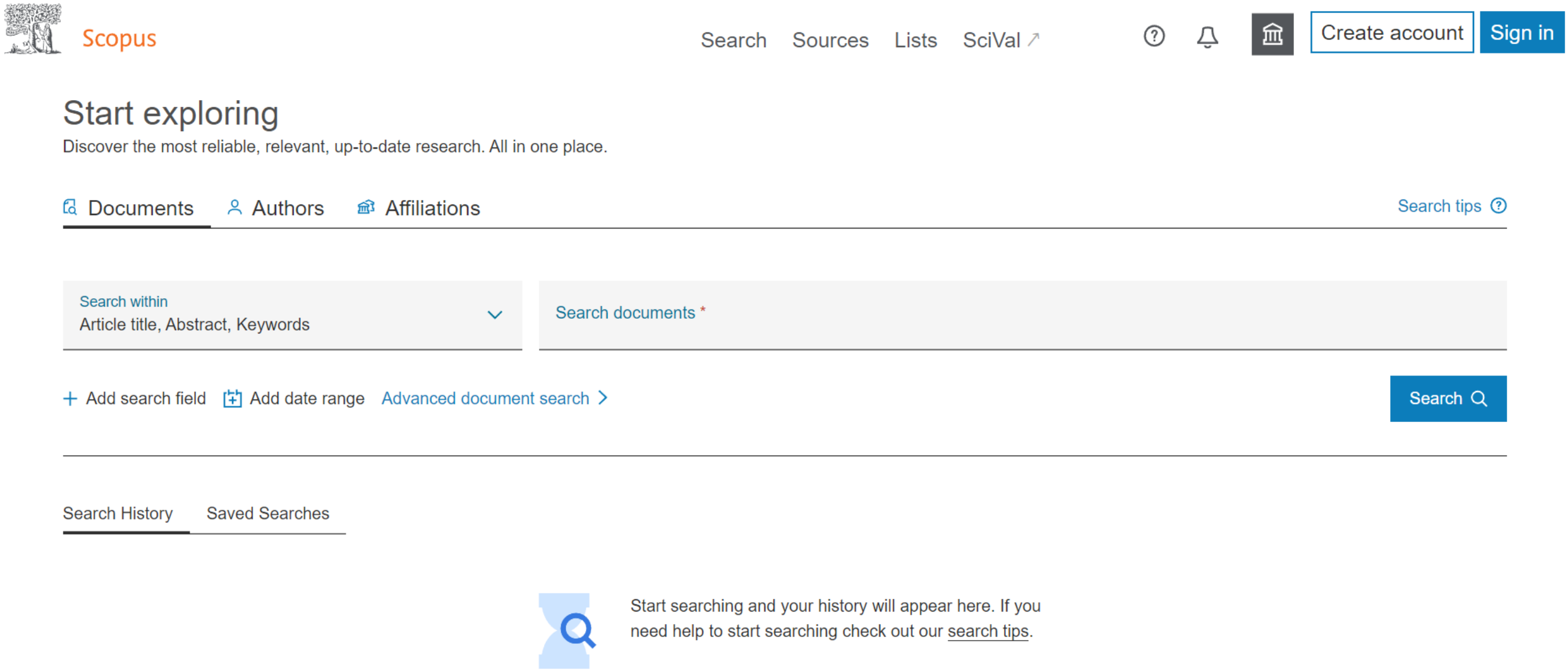
Export citation to text

Direct export: PubMed




National Library of Medicine
National Center for Biotechnology Information
PubMed.gov
coronavirus
Advanced
Create alert
Create RSS
Save
Email
Send to
1. Mark the records you need.
2. Click Send to at the top of search results, then select Citation manager.
3. Select the options.
4. Click Create file button to input data to your library.
1
2
Clipboard
My Bibliography
Collections
Citation manager
MY NCBI FILTERS
RESULTS BY YEAR
1949
2021
TEXT AVAILABILITY
Abstract
Free full text
Full text
Clear
1
Cite
Share
2003, there were only 10 coronaviruses
to December 2008, there was an addition of 16 coronaviruses ...
2
Broad-spectrum coronavirus antiviral drug discovery.
Totura AL, Bavari S.
Expert Opin Drug Discov. 2019 Apr;14(4):397-412. doi: 10.1080/1746044
8.
PMID: 30849247
Free PMC article.
Review.
The highly pathogenic coronaviruses severe acute respiratory syndrome coronavirus (SARS-CoV) and
Create a file for external citation management software
Selection:
Selection (2)
3
Create file
4
Cancel
Selection (2)
All results on this page
All results
Selection (2)

Direct export: Scopus



Scopus

Search Sources

1. Select the records you need.
2. Click **Export** at the top of search results, then it will present a **Export document setting** Box

196,547 document results

TITLE-ABS-KEY (coronavirus) AND (LIMIT-TO (PUBYEAR , 2022) OR LIMIT-TO (PUBYEAR , 2021) OR LIMIT-TO (PUBYEAR , 2020))

Edit Save Set alert

Search within results...

Refine results

Limit to Exclude

Open Access

- All Open Access (162,607)
- Gold (62,710)
- Hybrid Gold (13,105)
- Bronze (74,979)
- Green (127,362)

Learn more

Year

- 2022 (17,226)

Documents Secondary documents

1

2

Export

Document title

1 Patient-related outcomes in patients re clinic with persisting symptoms followir COVID-19
Open Access

View abstract View at Publisher Related documents

2 Negative pressure protective barrier device used in dental emergencies during the COVID-19 pandemic | [Dispositivo de barrera protectora con presión negativa utilizado en urgencias odontológicas durante la pandemia de COVID-19]

Mendivelso, F., Guevara, C., Bernal, L., López, L., Low, E.

2022 Iatreia 35(1), pp. 29-39

0

Export document settings

You have chosen to export 196547 documents

Select your method of export

MENDELEY ExLibris RefWorks SciVal RIS Format *EndNote, Reference Manager* CSV *Excel* BibTeX Plain Text *ASCII in HTML*

What information do you want to export?

Citation information	Bibliographical information	Abstract & keywords	Funding details	Other information
Author(s)	Affiliations	Abstract	Number	Tradenames & manufacturers
Author(s) ID	Serial identifiers (e.g. ISSN)	Author keywords	Acronym	Accession numbers & chemicals
Document title	PubMed ID	Index keywords	Sponsor	Conference information
Year	Publisher		Funding text	**Include references**
EID	Editor(s)			
Source title	Language of original document			
volume, issue, pages	Correspondence address			
Citation count	Abbreviated source title			
Source & document type				
Publication Stage				
DOI				
Open Access				

Cancel Export

Scopus

Export document settings

You have chosen to export 196547 documents

3. Select the record's information you need. (recommended at least *citation information*)
4. Select method of export as **RIS Format**
5. Click **Export** button to input data to your library.

Select your method of export

4

- ○ MENDELEY
- ○ ExLibris RefWorks
- ○ SciVal
- ◉ RIS Format *EndNote, Reference Manager*
- ○ CSV *Excel*
- ○ BibTeX
- ○ *ASCII in HTML*

3

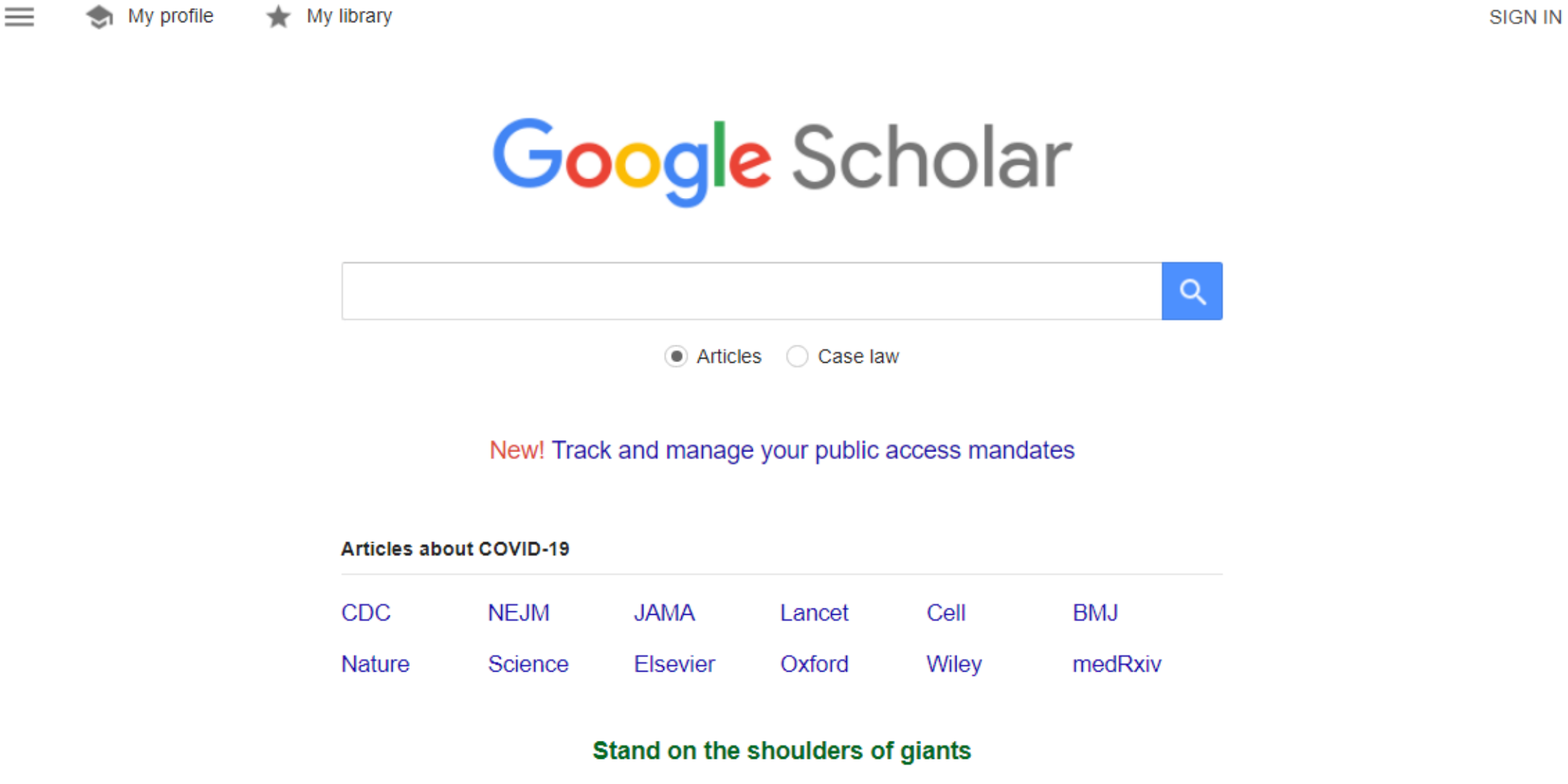
What information do you want to export?

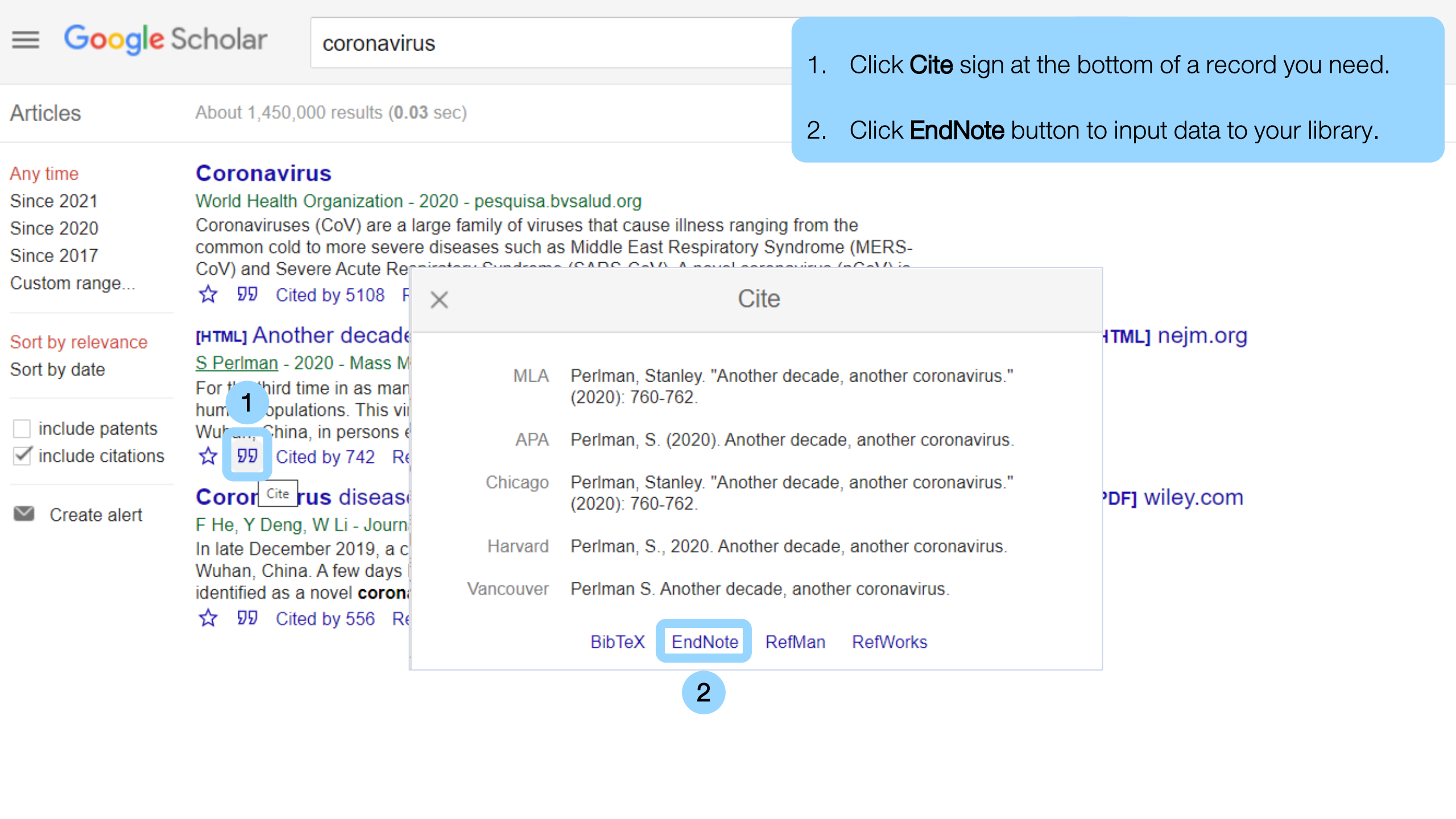
- ☑ Citation information
  - ☑ Author(s)
  - ☑ Author(s) ID
  - ☑ Document title
  - ☑ Year
  - ☑ EID
  - ☑ Source title
  - ☑ volume, issue, pages
  - ☑ Citation count
  - ☑ Source & document type
  - ☑ Publication Stage
  - ☑ DOI
  - ☑ Open Access
- ☑ Bibliographical information
  - ☑ Affiliations
  - ☑ Serial identifiers (e.g. ISSN)
  - ☑ PubMed ID
  - ☑ Publisher
  - ☑ Editor(s)
  - ☑ Language of original document
  - ☑ Correspondence address
  - ☑ Abbreviated source title
- ☐ Abstract & keywords
  - ☐ Abstract
  - ☐ Author keywords
  - ☐ Index keywords
- ☐ Funding details
  - ☐ Number
  - ☐ Acronym
  - ☐ Sponsor
  - ☐ Funding text
- ☐ Other information
  - ☐ Tradenames & manufacturers
  - ☐ Accession numbers & chemicals
  - ☐ Conference information
  - ☐ **Include references**

5

Cancel | Export

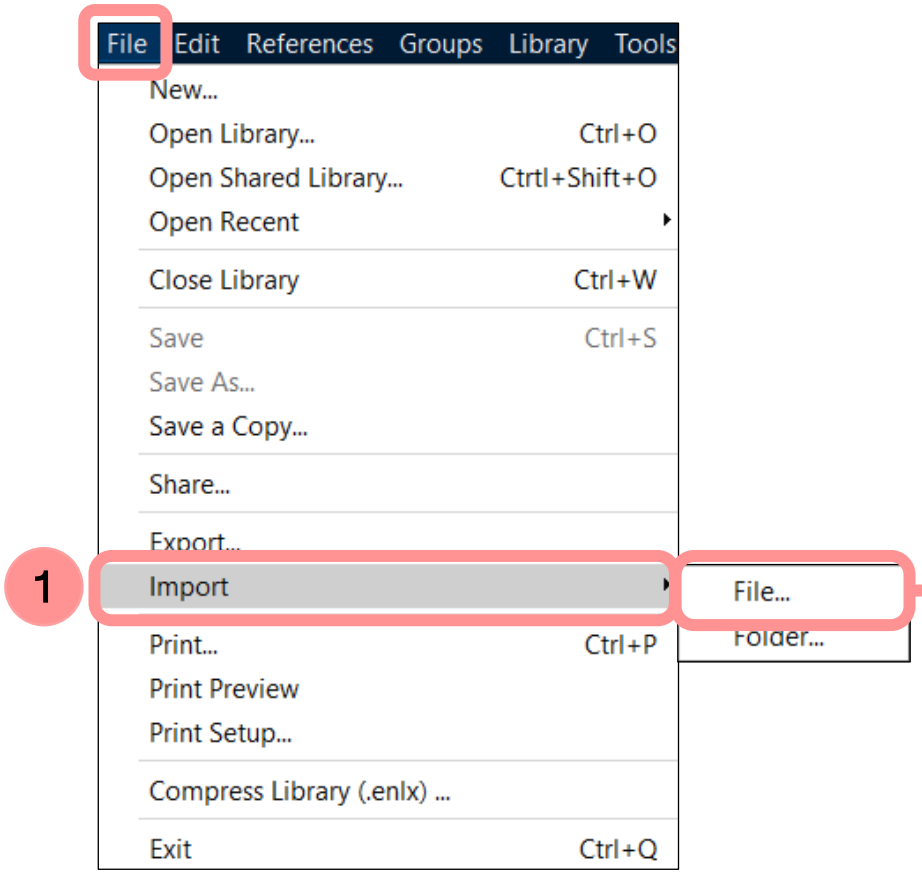
Direct export: Google Scholar

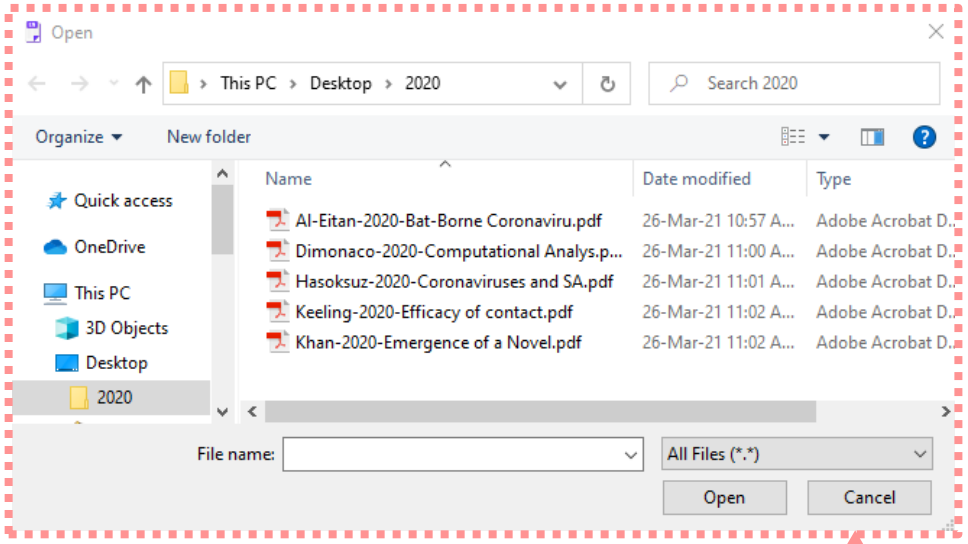


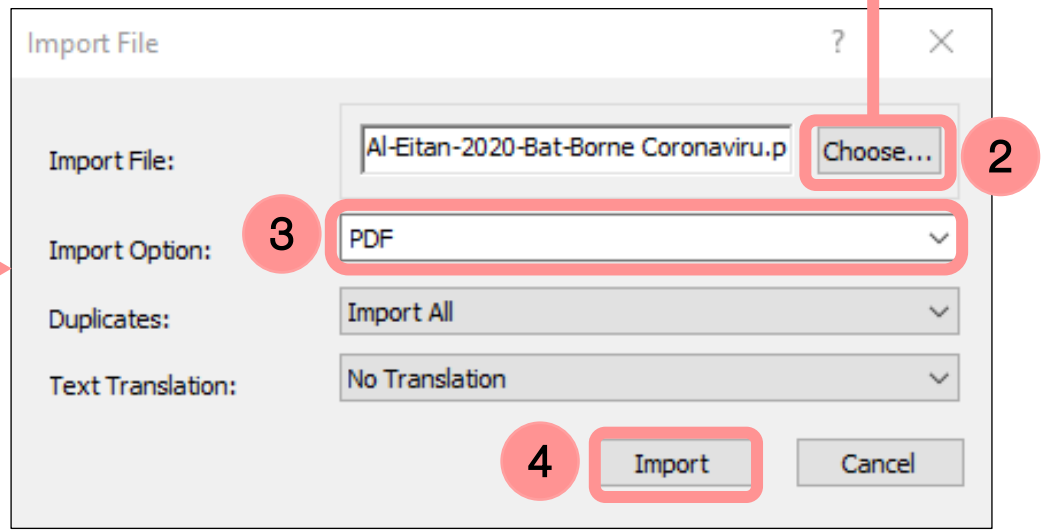

Google Scholar
coronavirus
1. Click Cite sign at the bottom of a record you need.
2. Click EndNote button to input data to your library.
Articles
About 1,450,000 results (0.03 sec)
Any time
Since 2021
Since 2020
Since 2017
Custom range...
Sort by relevance
Sort by date
include patents
include citations
Create alert
Coronavirus
World Health Organization - 2020 - pesquisa.bvsalud.org
Coronaviruses (CoV) are a large family of viruses that cause illness ranging from the common cold to more severe diseases such as Middle East Respiratory Syndrome (MERS-CoV) and Severe Acute
Cited by 5108
[HTML] Another decade
S Perlman - 2020 - Mass M
For the third time in as man
populations. This vi
Wuhan, China, in persons
Cited by 742
Cite
[HTML] nejm.org
Coron rus disease
F He, Y Deng, W Li - Journ
In late December 2019, a c
Wuhan, China. A few days
identified as a novel coron
Cited by 556
[PDF] wiley.com
Cite
MLA Perlman, Stanley. "Another decade, another coronavirus." (2020): 760-762.
APA Perlman, S. (2020). Another decade, another coronavirus.
Chicago Perlman, Stanley. "Another decade, another coronavirus." (2020): 760-762.
Harvard Perlman, S., 2020. Another decade, another coronavirus.
Vancouver Perlman S. Another decade, another coronavirus.
BibTeX
EndNote
RefMan
RefWorks
1
2

Import PDF File (1)

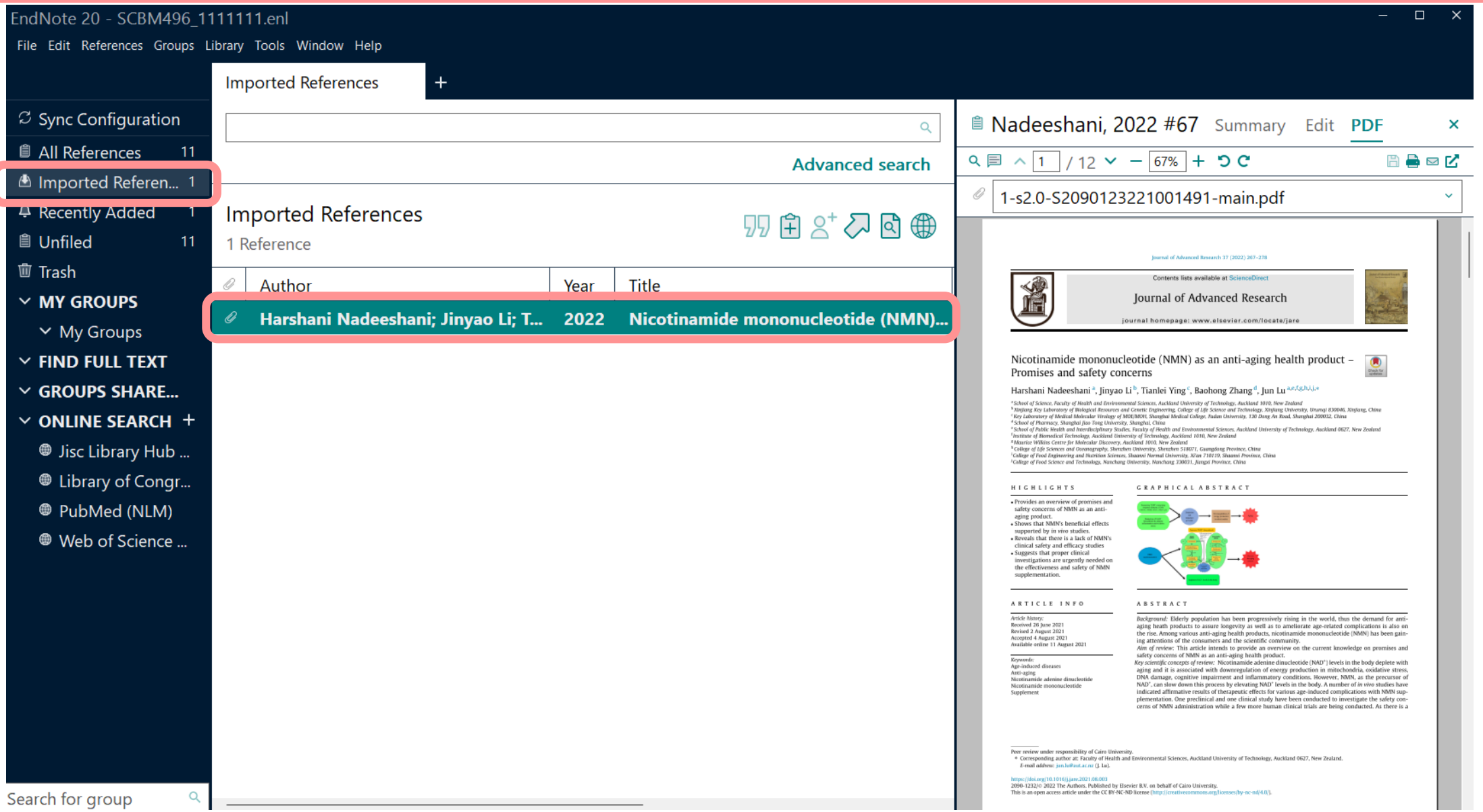
1. Go to **File > Import > File…** to open the Import File dialog.
2. Click **Choose** to select a PDF file from your hard drive.
3. Select Import Option as **PDF**
4. Click **Import** to import a PDF file into your library.





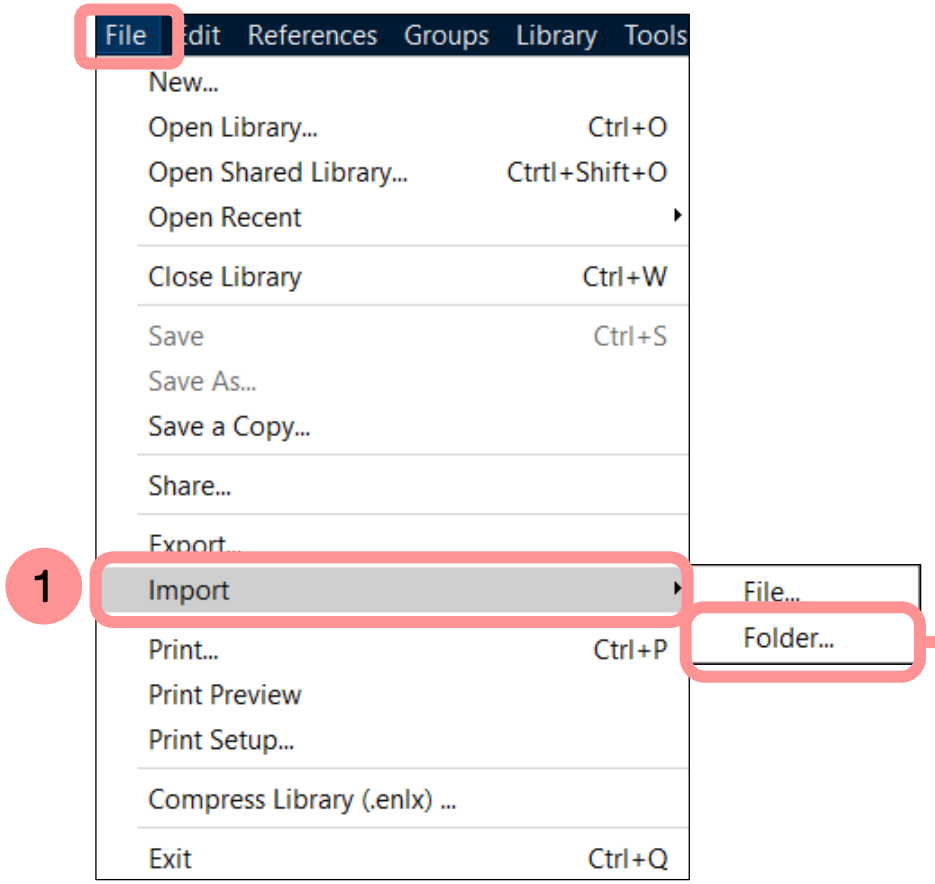


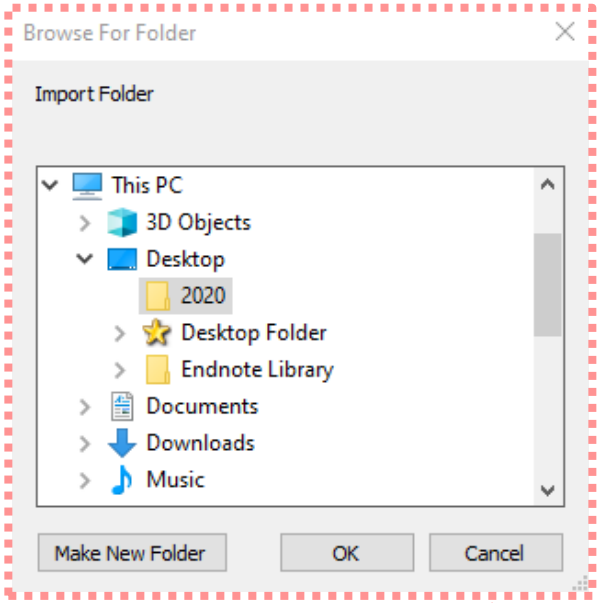
Import PDF File (2)

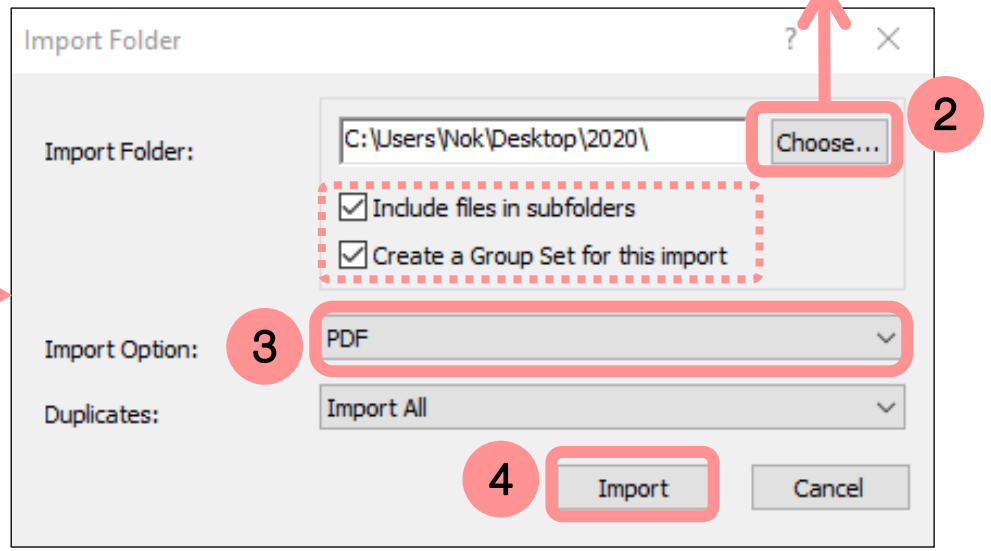


Import PDF Folder (1)

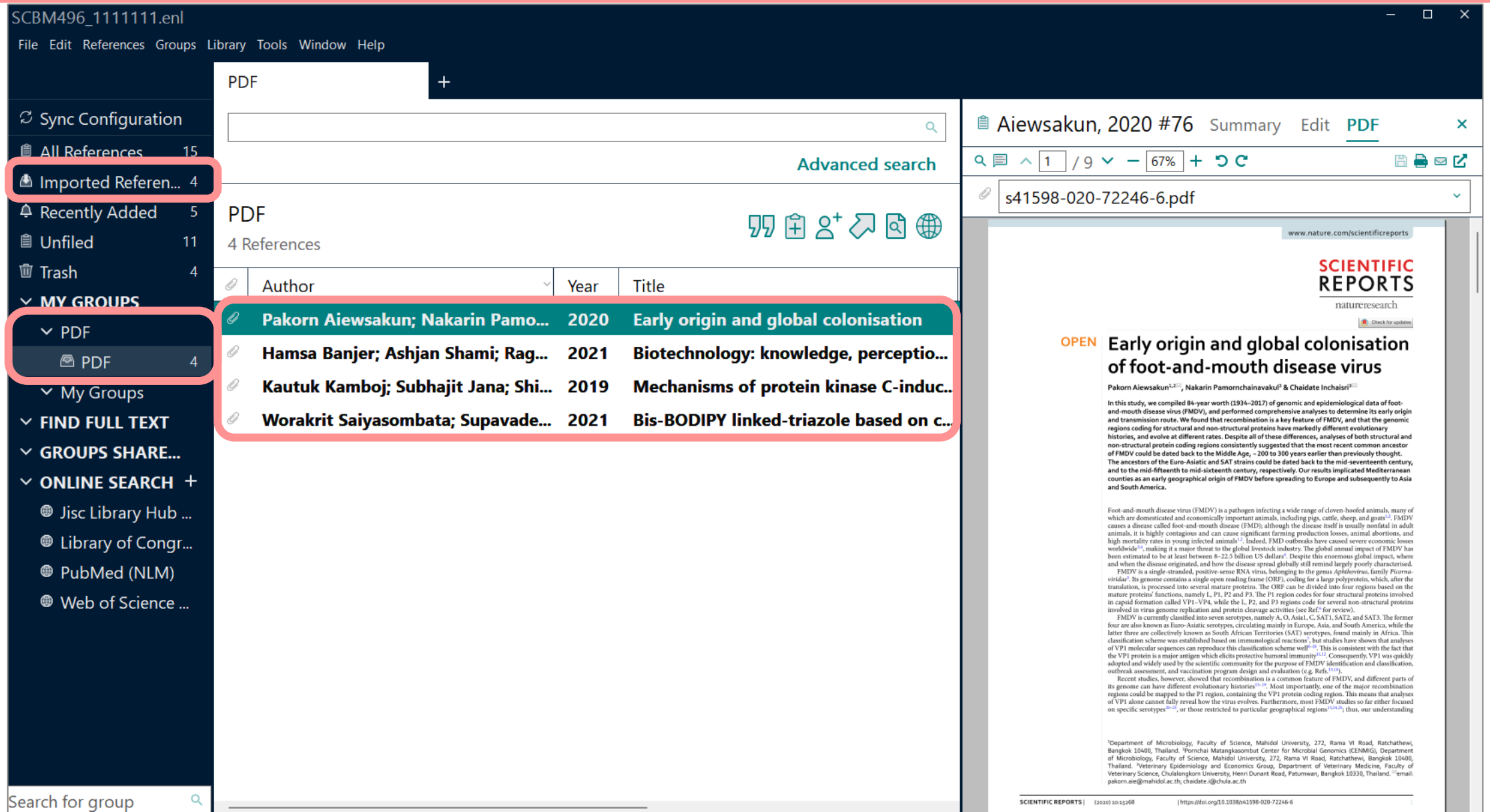
1. Go to **File** > **Import > Folder…** to open the Import File dialog.
2. Click **Choose** to select the PDF folder from your hard drive. (additional settings as needed.)
3. Select Import Option as **PDF**.
4. Click **Import** to import the PDF files from the selected folder into your library.





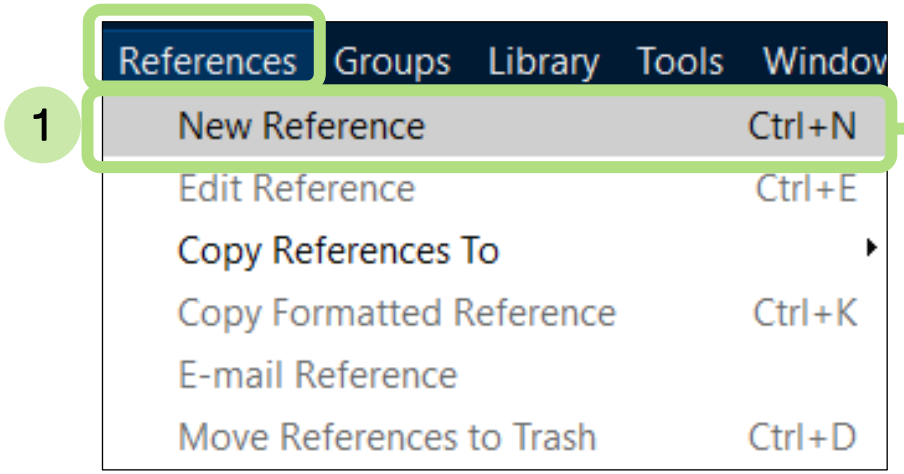


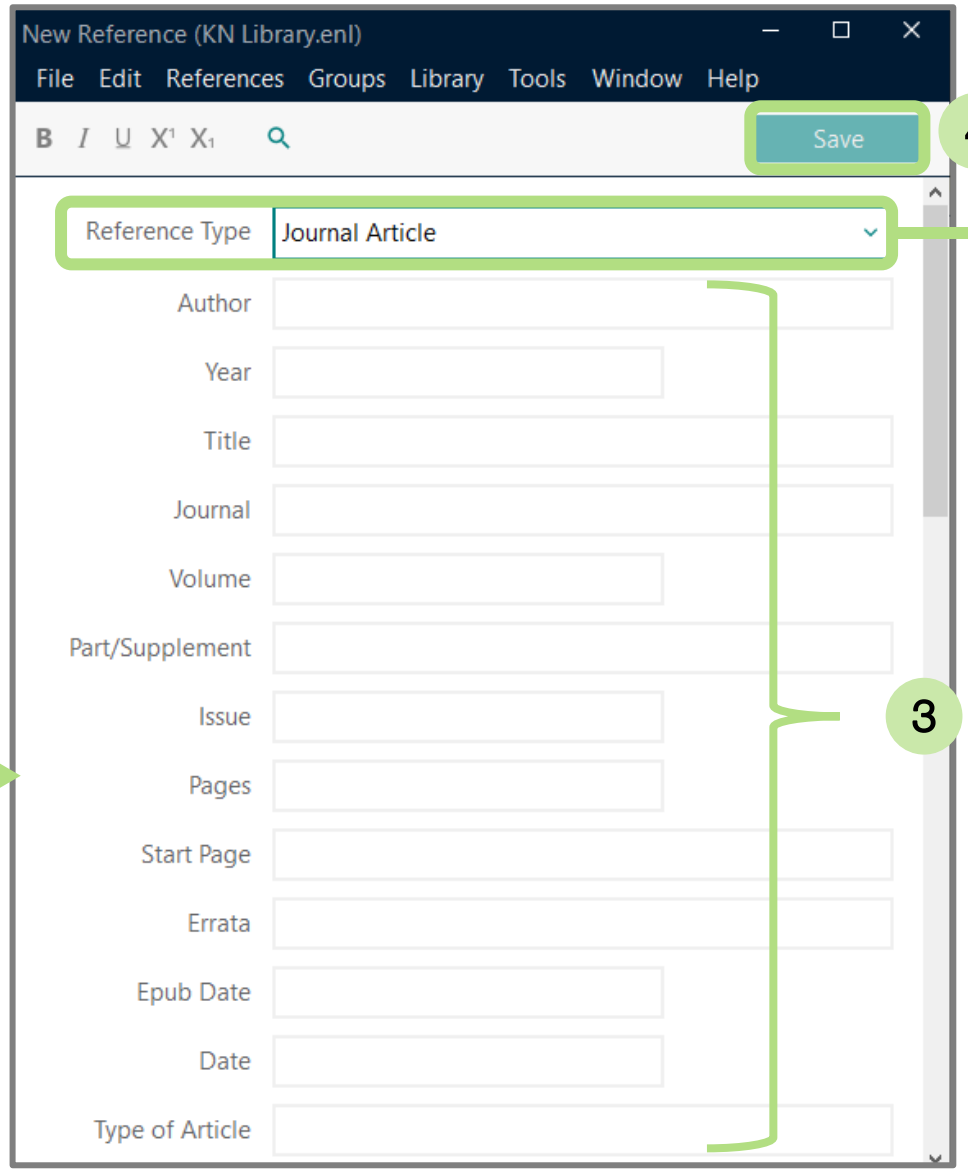
Import PDF Folder (2)

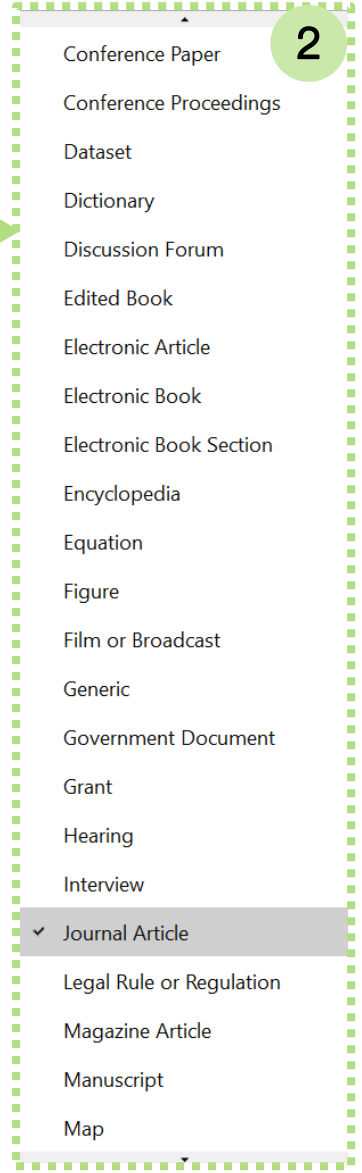


Manual Typing (1)

1. Go to **Reference > New Reference**.
   A blank reference window appears.
2. Select a Reference Type from the drop-down menu.
   (the default type is Journal Article)
3. Enter bibliographic data into the desired fields.
4. Saving reference by click at **Save** button, or close the reference window to saved automatically.







Manual Typing (2)

How to enter the author's name

- Enter one name per line.
- New Terms appear in red text.

Author names formats

- First_name Middle_name Last_name

  Albert Einstein

  Albert Lester Lehninger

- Last_name, First_name Middle_name

  Einstein, Albert

  Lehninger, Albert Lester

Institute/Corporate name formats

- add a comma after the name.

  World Health Organization,

  Mahidol University,

  คณะวิทยาศาสตร์ มหาวิทยาลัยมหิดล,

Thai author name formats

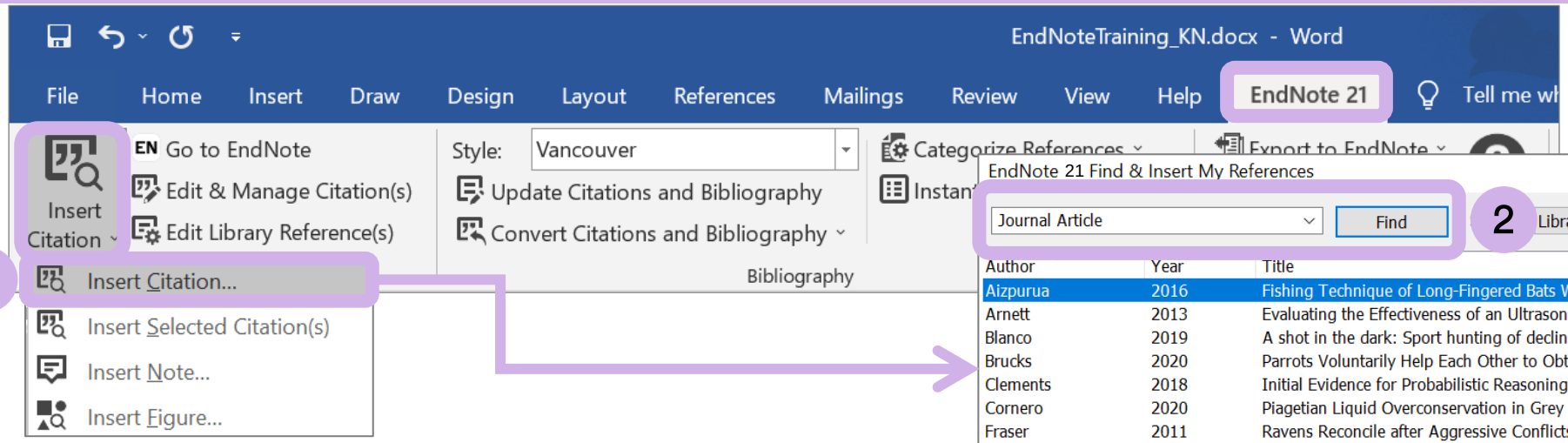
- add a comma after the name.

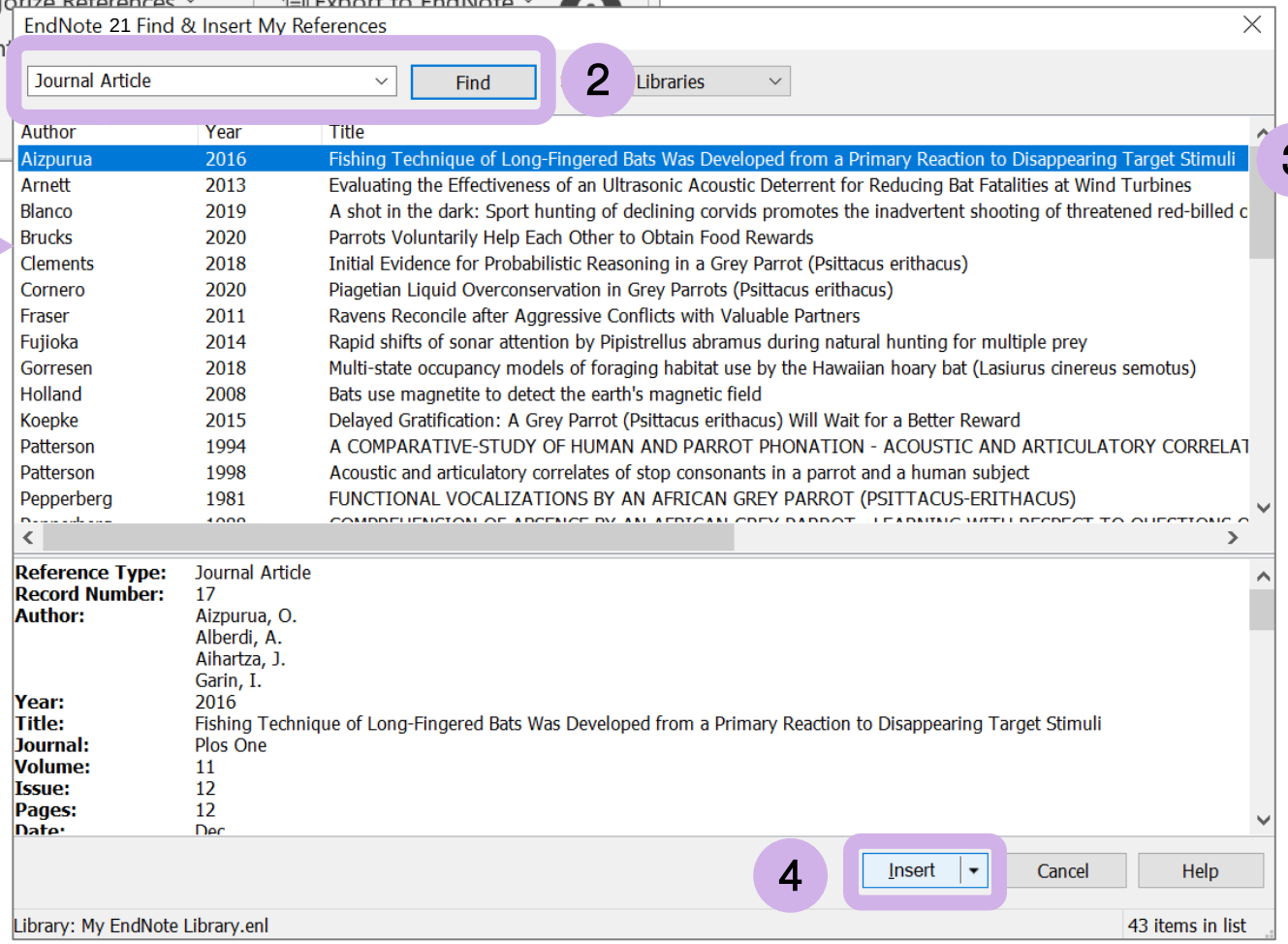
  กนกพร งามสว่างรุ่งโรจน์,

Working with MS Word

- Inserting Citations or Selected Citations
- Edit & Manage Citations
- Configure Bibliography
- Convert Citations and Bibliography

Inserting Citations



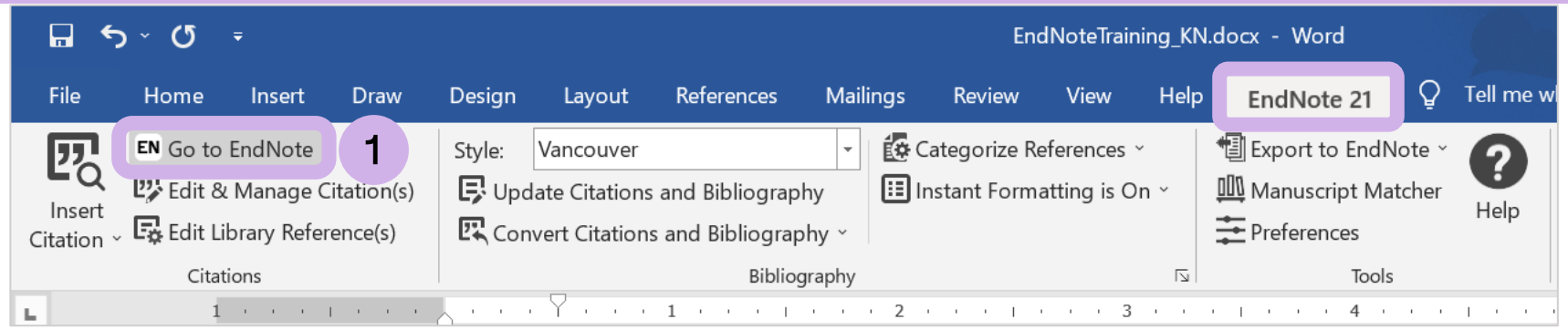


Open the Word document and position the cursor at the location where you would insert the citation.

1. Go to **EndNote 21** menu, select **Insert Citation** to display the **Find & Insert My References** box.
2. In the text box at the top, enter text to find the reference you wish to cite, then click **Find** or press Enter.
3. Select the desired references from search result.
4. Click **Insert**.

The inserted citation would appear in your manuscript.

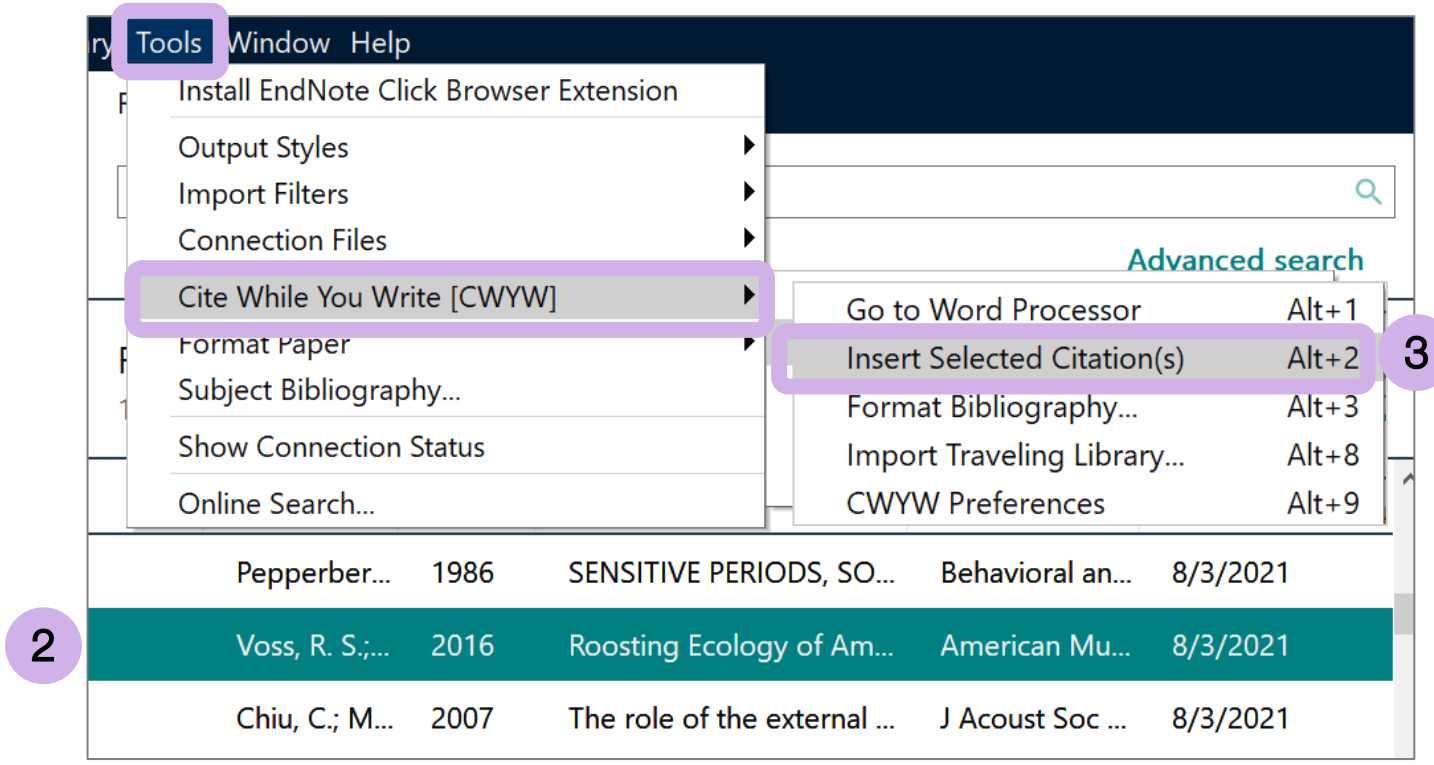
Inserting Selected Citations (1)



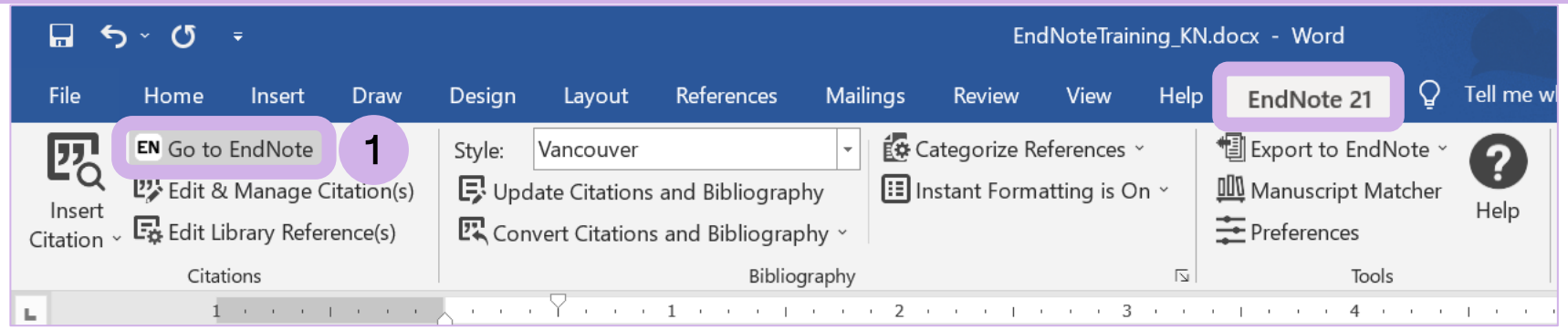
Open the Word document and position the cursor at the location where you would insert the citation.

1. Go to **EndNote 21** menu, select **Go to EndNote.**
2. At your EndNote library, select the desired references.
3. Go to Endnote's **Tools** menu, select
   Cite While You Write [CWYW] > Insert Selected Citation(s)

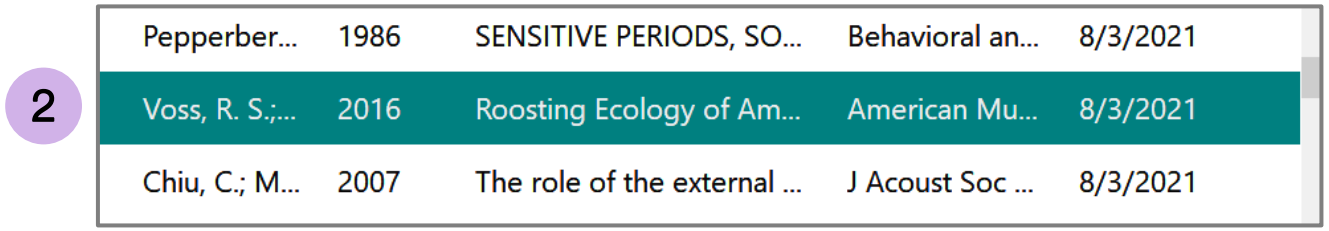
The inserted citation would appear in your manuscript.



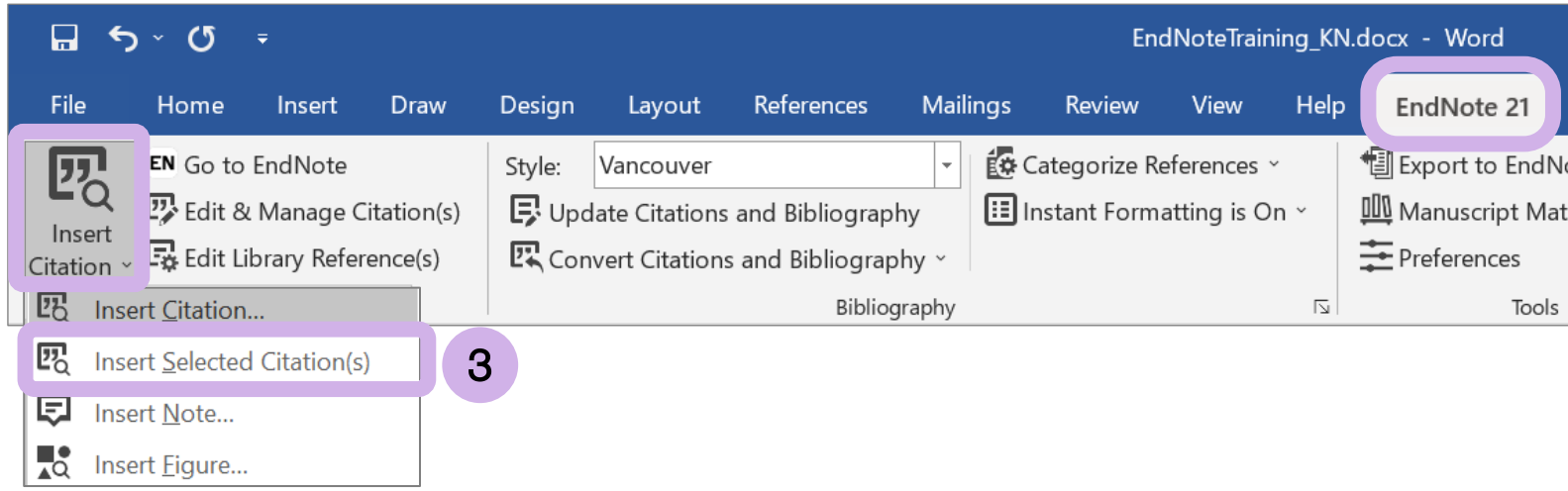
Inserting Selected Citations (2)



Open the Word document and position the cursor at the location where you would insert the citation.

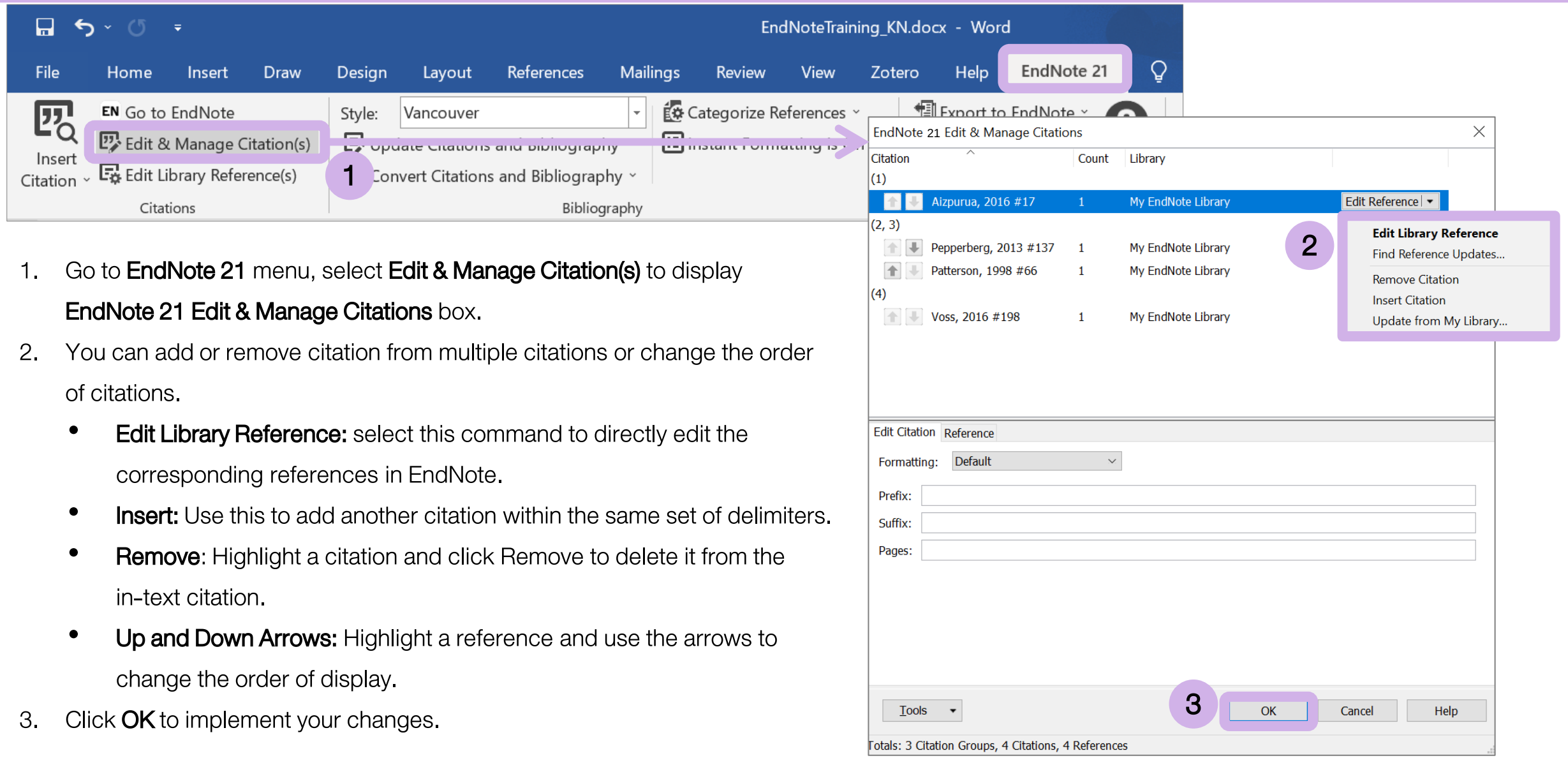


1. Go to **EndNote 21** menu, select **Go to EndNote**.
2. At your EndNote library, select the desired references.
3. Return to Word document. Go to **EndNote 21** menu, select **Insert Selected Citation(s)**



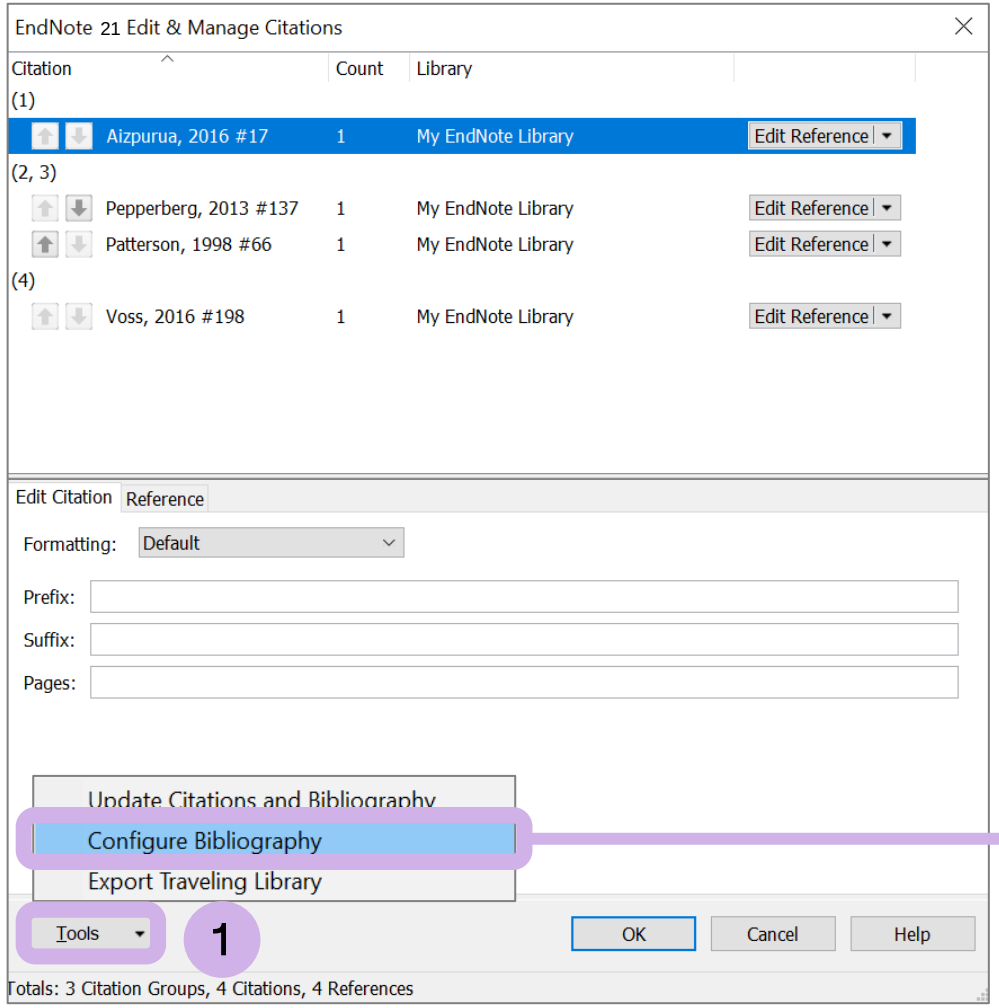
The inserted citations would appear in your manuscript.

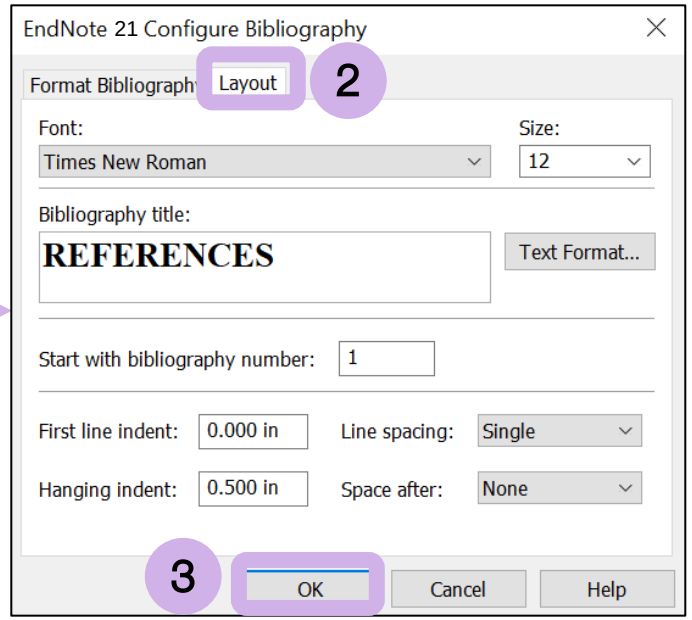
Edit & Manage Citation



1. Go to **EndNote 21** menu, select **Edit & Manage Citation(s)** to display **EndNote 21 Edit & Manage Citations** box.
2. You can add or remove citation from multiple citations or change the order of citations.
   - **Edit Library Reference:** select this command to directly edit the corresponding references in EndNote.
   - **Insert:** Use this to add another citation within the same set of delimiters.
   - **Remove**: Highlight a citation and click Remove to delete it from the in-text citation.
   - **Up and Down Arrows:** Highlight a reference and use the arrows to change the order of display.
3. Click **OK** to implement your changes.

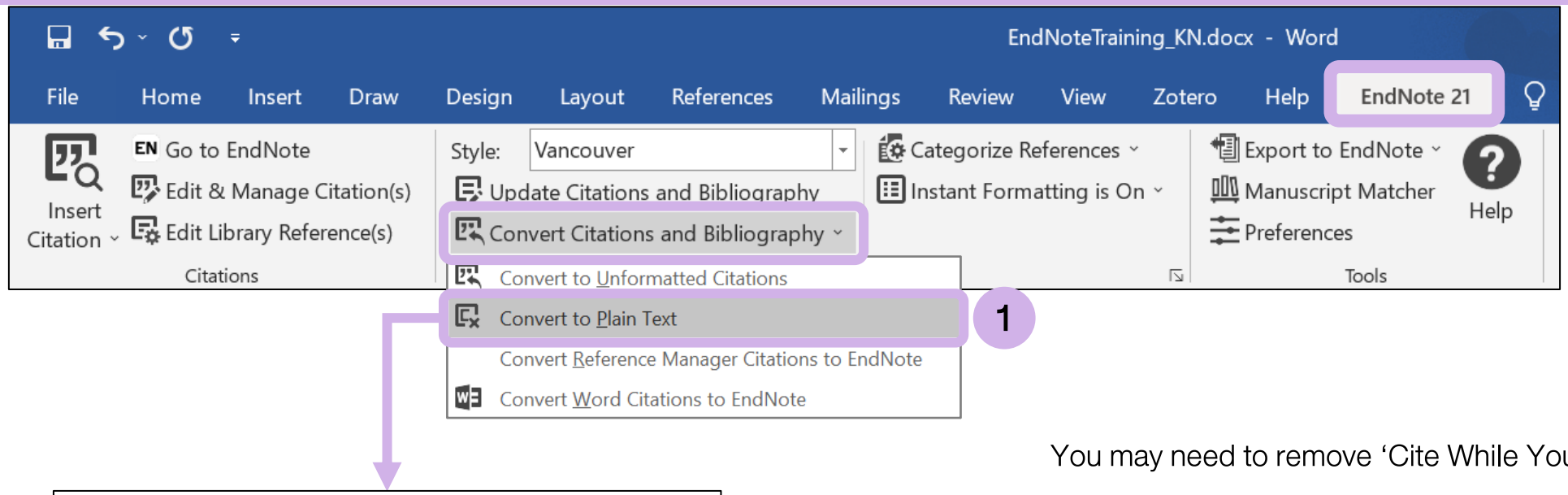
Configure Bibliography

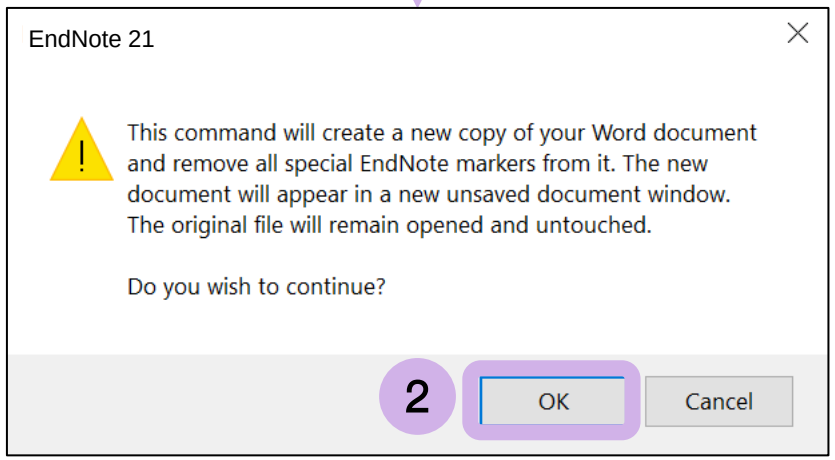




1. From **EndNote 21 Edit & Manage Citations** box, click at **Tools** menu at the lower left corner, select **Configure Bibliography**
2. On the **Layout** tab, you can change or verify these settings:
   - **Font and Size:** these are the text font and size used for the bibliography.
   - **Bibliography Title:** to print a title at the top of your bibliography, type the title in this text box.
   - **Text Format:** highlight the bibliography title text and then use the Text Format button to display a dialog where you can change the format of the highlighted text.
3. Click **OK** to implement your changes.

Convert Citations and Bibliography





You may need to remove 'Cite While You Write' field codes in order to share your document with a publisher or colleague. Convert to Plain Text will save a copy of your document without formatted 'Cite While You Write' field codes. The formatted citations and the bibliography are saved as text. By following the steps;

1. Go to **EndNote 21** menu, select **Convert Citations and Bibliography > Convert to Plain Text**
2. Word presents the notification box, read and click **OK** to continue.
3. A copy of the document, without field codes will appears in a new document window. Then you can save a new name for copy of your document.