

EndNote Essentials Workshop
citations.library@mcgill.ca

Getting Started

- A. Obtain the EndNote software: <http://www.mcgill.ca/library/services/citation/software/endnote>
- B. Signup for EndNote Web: <http://proxy.library.mcgill.ca/login?url=http://www.myendnoteweb.com>

Entering References

1. Typing information into a reference form: Under **References**, choose **New Reference**
 - Next to **Reference Type** make a selection from the drop-down menu
 - Enter authors on separate lines. Format: *Family Name, First Name* or *Organization Name*,
2. Importing references from databases that support Direct Exporting to EndNote
 - Ex. 1: *Scopus*. Select records to export. Click **Export**. Choose **RIS/EndNote** format. Click **Export**. Click **Open** in your browser window.
 - Ex. 2: *Google Scholar*. Click on **Settings**. Under **Bibliography Manager**, choose **EndNote** and **Save**. Once you've done a search, click **Import into EndNote** and choose **Open**.
 - Ex. 3: *McGill Library WorldCat catalogue*. Click on the title of the item. Click **Cite/Export**. Click **Export to EndNote**. Click **Open**. Register for a free account to export multiple references.
 - Ex. 4: *McGill Library Classic Catalogue*. Select records to export. Click on **Save/Mail**. Select **EndNote** in the box at the top of the page, then click **Export to EndNote** (twice). Click **Open**.
3. Importing references using Import Filters
 - Ex. *Papers First (OCLC)*. Select records to export. Click on **Export**, choose **Export to Endnote** and click on **Export**. Save the file on your computer. In the EndNote program, go to **File > Import to** select the saved file and the corresponding **filter** (in this case, *Papers First (OCLC)*).
4. Using the Online Search function to search databases from within EndNote
 - Ex.: *PubMed* or *McGill Library*

Working with a Library

- A. Attaching full text articles to a reference
 1. "Find Full Text" button. To configure, go to **Edit>Preferences** and enter the following:
 - OpenURL Path: <http://mclink.library.mcgill.ca/sfx>
 - When off campus, Authenticate with <http://proxy.library.mcgill.ca/login?url=>
 2. Manually attaching document files
- B. Creating Groups in a Library: Under **Groups**, choose **Create Group** or **Create Smart Group**
 1. Groups require manual relocation of records.
 2. Smart Groups use criteria you set to automatically retrieve matching citations within your EndNote library.
- C. Selecting an Output Style: Use the dropdown menu in upper left-hand region of EndNote interface
- D. Searching and detecting duplicates: Under **References**, choose **Find Duplicates**. To alter the criteria for identifying duplicates, go to **Edit > Preferences > Duplicates**
- E. Saving a compressed Library for transferring or e-mailing: go to **File > Compressed Library (.enlx)**

F. Transferring references to EndNote Web: go to **Tools>Synch**

Using Cite While You Write (CWYW) with a word processor

- A. Creating a quick bibliography
 1. Open the library or group that contains the citations you wish to use.
 2. Order the citations (e.g., alphabetically, by year) as they should appear in the bibliography.
 3. Highlight the citations you wish to include in the bibliography. Hold down the Ctrl key to select multiple items.
 4. Select "Copy formatted": **Edit > Copy formatted**
 5. Paste into a Word document.
- B. Inserting in-text citations
- C. Changing the citation style
- D. Editing citations: excluding authors, adding page numbers, etc.
- E. Converting citations to plain text for final submission

More information about output styles, import filters, and connection files

What is a filter?

- A filter is a file that acts as an interface that allows EndNote to interpret the parts of references that have been saved in a file (i.e., downloaded from an online catalogue or database). The filter allows EndNote to import the file.

What is a connection file?

- Connection files allow you to search and import references from online databases and catalogues, using EndNote itself as a search interface. EndNote connection files are available for library catalogues and a limited number of online databases.

What is an output style?

- Output style files act as templates that show EndNote how to arrange the information in each of your EndNote references when you're creating citations and bibliographies. Output styles can be modified and saved.
- Styles include discipline-specific citation styles such as APA (social sciences), MLA (humanities), and CSE (biological sciences), or styles established for specific journals (*Journal of Politics*, *The Lancet*, etc.)

When you download EndNote on your own computer, a selected set of common output styles, connection files, and filters is included. However, these do not correspond directly to the connection files and filters for databases to which we have access at McGill, nor is every style included.

If you don't see the style, filter, or connection file that you need, you can check the EndNote website for additional files: <http://endnote.com/downloads/styles>