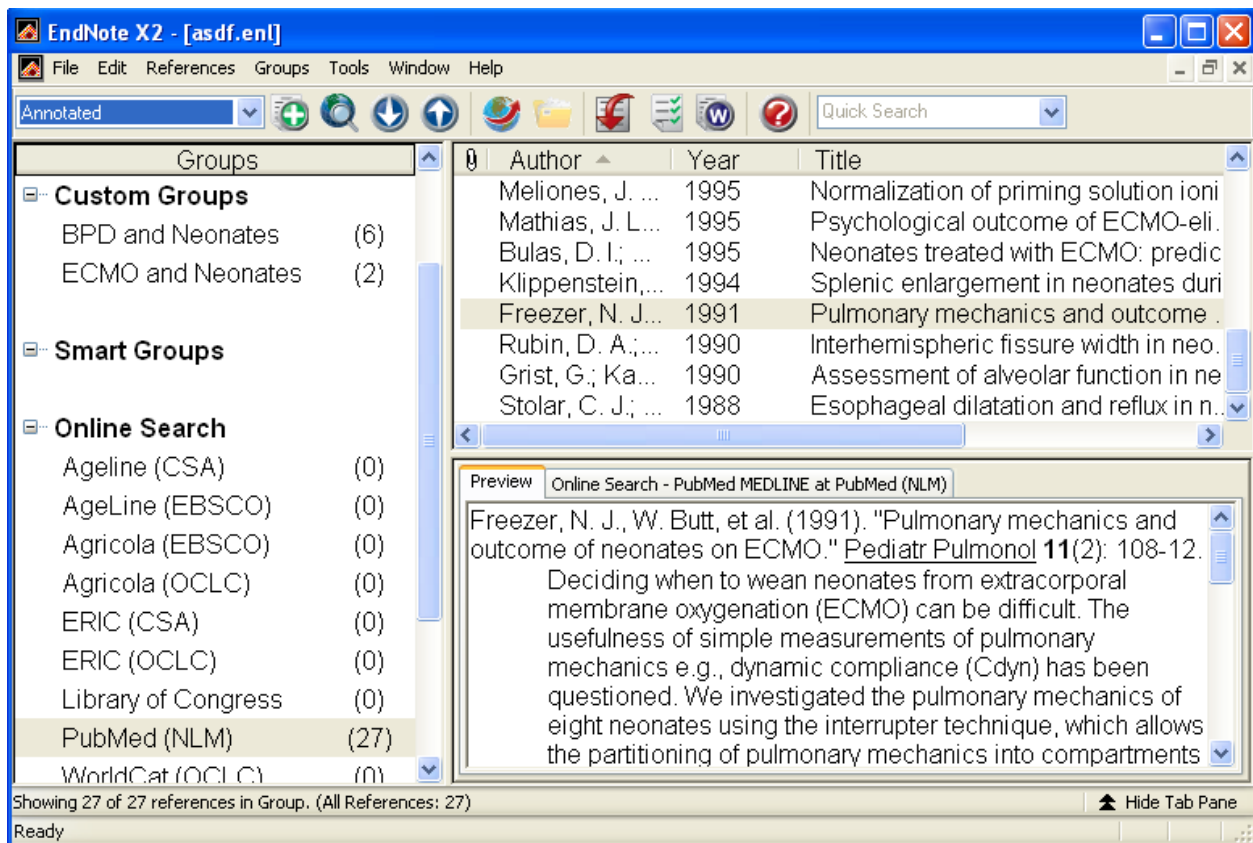


EndNote version X2 (v. 12)

1. Basics of Bibliographic File Management Programs & Notable Features of EndNote

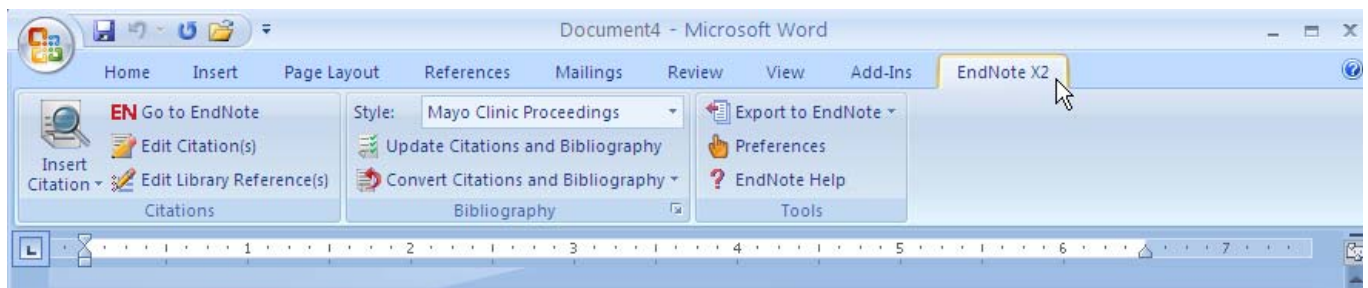
- What are bibliographic file management programs?
- How does EndNote compare to other bibliographic management programs?



1. Full text locator!
2. Reference types include: Blog, Catalog, Pamphlet, Serial Publication, Grant, and Web Page
3. Library and attached PDFs can be compressed into a single file and emailed as an attachment
4. 3,000 + bibliography styles
5. References can be imported directly from many online catalogs and databases
6. Images and tables and PDFs can be added to an EndNote library

2. Creating an EndNote Library and Formatting a Bibliography

1. Create a folder on the Desktop called *Myocardial Infarction*
2. Create a new EndNote library. Call it **Myocardial Infarction**. Next, save the library to the **Myocardial Infarction** folder on the Desktop.
3. Enter some citations manually. How you enter author names is very important! All of the following are fine:
 - C.V. Smith
 - Smith, J.P.
 - Smith, J P (space between "J" and "P")
 - Smith, John Paul
 - National Institutes of Health, (place a comma after the name of the organization)
4. Select *PubMed (NLM)* from the *Online Search* options on the left side of your library to search PubMed from within EndNote. Run a *TITLE* search for articles on **myocardial infarction** and **aspirin**. NOTE: EndNote provides an option to save the search (located on the search interface under *Options*)
5. Select and delete any citations you don't want, or, with *PubMed (NLM)* still highlighted, chose the cites you DO want, then choose *References/Hide Selected*. You can now delete the remaining, unwanted cites.
6. In EndNote, choose *Edit/Output Styles/Open Style Manager*. Select an output style for your bibliography, e.g., *Mayo Clinic Proceedings*, by clicking in the checkbox so you see a green checkmark.
7. Open MS Word 2007. Select the EndNote X2 tab.



8. The output style you selected should appear next to the *Style* pull-down menu
9. Type a sentence. Go back to EndNote and highlight a couple of citations. Go back to MS Word, position your cursor to the immediate right of the period in the first sentence, and click on the *Insert Citation* down-arrow, then select *Insert Selected Citation(s)*. You can also use the *Find Citation* option to retrieve a reference. Click *Insert* to add it. This allows you to Cite-While-You-Write!

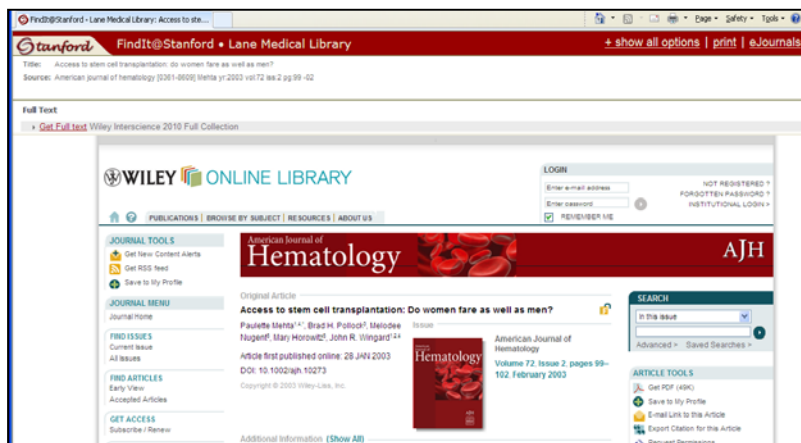
3. Importing Downloaded Citations

1. Connect to PubMed from Lane's homepage and locate articles from *BMJ* that discuss *myocardial infarction*.
2. Change the *Display* pull-down menu selection to the *MEDLINE* format. Download the first ten citations. The file will be downloaded as a simple text file with a ".txt" extension; e.g., *pubmedcites.txt*. You can change the first part of the name, but leave the ".txt". Next, place the citations in your *Myocardial Infarction* folder on the Desktop.
3. Within EndNote, go to *File* and select *Import* to import the citations you downloaded from PubMed. Be sure that the *Import Option* is set to *PubMed (NLM)*. If it's not, go to *Import Option*, then *Other filters* and select the filter for *PubMed (NLM)*

4. Accessing Full-text

Option 1: Highlight your references; choose *References/Find Full Text*. EndNote will **try** to retrieve PDFs of the selected citations automatically.

Option 2: Within EndNote, choose *Edit/Preferences/Find Full Text* and add <http://sfx.stanford.edu/local> to the *OpenURL Path* box. Click "*Apply*" and "*OK*." The next time you right click on a high-lighted reference, choose *URL/Open URL Link* to access the *findit@stanford* full-text finder window.



5. Creating Custom AND Smart Groups

1. Select *Groups/Create Group*. Create a group called, *MI's and Aspirin*. Select the *Imported* folder, then drag and drop the citations to the new group.
2. You can use *Smart Groups* to build a group based on search terms, e.g., an author and/or a keyword

6. Unformatting Citations for Easier Editing

1. Open a new document. Choose *Convert Citations.../Convert to Unformatted Citations*. Note the different "look." This is the preferred format for moving or deleting your citations. When you're finished cutting and pasting, simply click on *Update citations and Bibliography* to generate your bibliography. *NOTE: For EndNote to recognize an unformatted in-text citation as an in-text citation, the cite must be enclosed in curly brackets.*
2. Cut and paste some citations to get a sense of how to manipulate your in-text citations. The semicolons act as separators between references.

7. Changing General Preferences

- Select *Edit/Preferences*. Review the following: *Display Fonts, Display Fields, Sorting and Folder Locations*.

8. Annotating References with Keywords

1. In your EndNote library, identify the citations you want to annotate. Use the CTRL key and your mouse to select the citations, then separate them from the rest of the library by choosing *References/Show Selected References*.
2. Now, choose: *Tools/Change and Move Fields*.
3. Select the *Research Notes* field from the *In* pull-down menu, then choose *Insert before field's text*. Type a keyword, hit CTRL-Enter to add a carriage return, then click *OK*.
4. To retrieve annotated references, choose *All References*, then use the search box at the bottom of the library to run a search on the keyword that you used to annotate your references.

Practice Exercise:

1. Add the following citation to your EndNote library:

Carlson GA. 2002. Brain Visualization. In *New Concepts in Brain Imaging*, ed. Simon Albes, pp. 70-90. New York, NY, US: Cambridge University Press
2. Connect to PubMed from within EndNote and run a search on *malaria vaccines*. Limit to English and review articles. Download the first twenty.
3. Open a new MS Word document, type a couple of sentences. Cite 5-10 references. Format your bibliography in the style required by the journal *BMJ*.

9. Linking PDFs and Adding Figures

1. Connect to PubMed from Lane's homepage and try to locate an article by *Wong RS* in BMJ published in 2003. Download the reference in the MEDLINE format or use the *Stanford* icon's EndNote single citation download option. Drag and drop the PDF for the Wong article onto the Wong reference. Note the paper clip icon that appears.
2. Locate an image of a SARS virus. Go to Google.com and type *sars virus* then click on the image tab. Download and save the image to the SARS folder.
3. Within EndNote, go to *File/Import* to import the citations you downloaded from PubMed. Be sure that the *Import Option* is set to *PubMed (NLM)*. If it's not, go to *Import Option/Other filters* and select the filter for *PubMed (NLM)*
4. Adding figures. Choose *References/New Reference*. Select *Figure*. Right click on the *Image* field, and choose *Figure/Attach Figure* to insert your graphic image. Name it *SARS virus* and *be sure* to close the reference window to save it!
5. Go back to MS Word, click on *Insert Citation/Find Figure*. Type, *sars* then click on *Search*. Insert the figure into your manuscript.

10. Customizing Output Styles

1. From within EndNote, choose: *Edit/Output Styles/Open Style Manager* and highlight *Journal of Orthopaedic Resesarch*. Click the Edit button.
2. Go to *File/Save As* and re-name the file *Journal of Pulmonary Medicine*. Close the edit window for the new style. Go to *Edit/Output Styles*. You should see a list that includes the name of your new output style. Select it. Next, highlight the style in the *Endnote Styles* window and click *Edit*.
3. The current style, *Journal of Orthopaedic Resesarch* should look like this:

Jain, SI, Tung, RS, Burton, SZ. 2006. Pharmacological therapy for acute respiratory distress syndrome. *Nat Med* 17: 158-168.

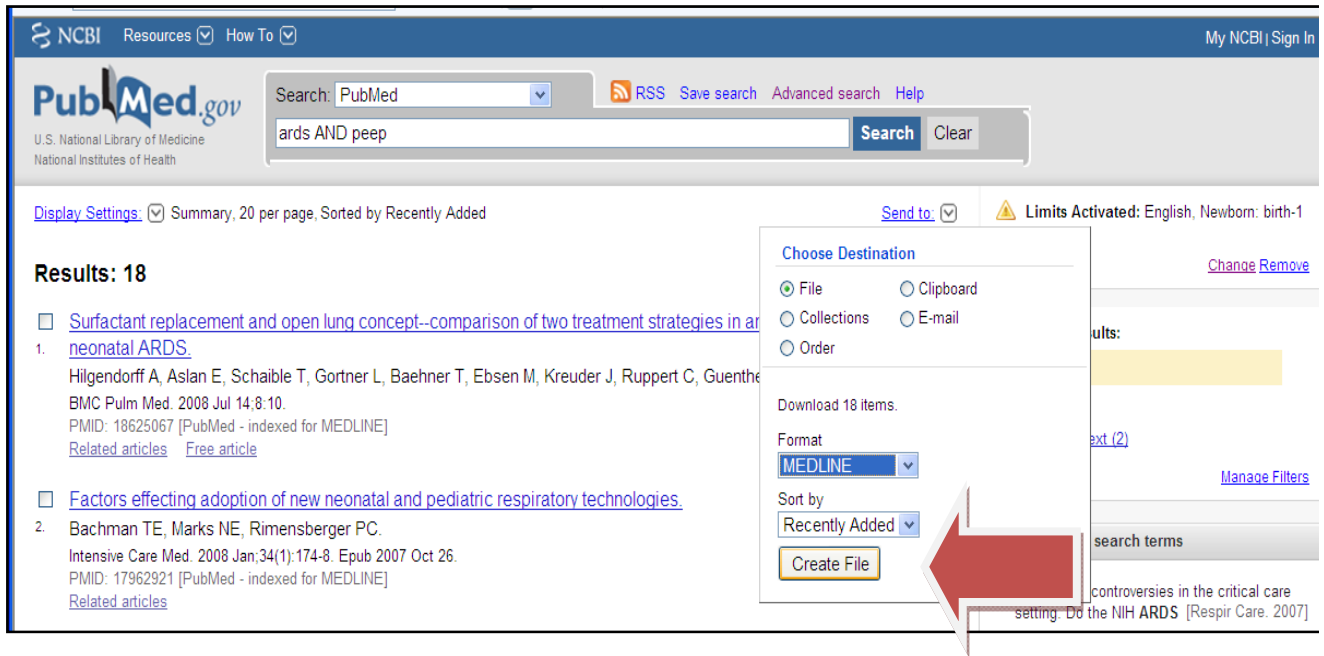
4. You want to alter the style to look like this:
 1. Jain SI, Tung RS, *et al*: Pharmacological therapy for acute respiratory distress syndrome *Nature Medicine*. 2006; 17: (2) 158-68.
5. Review the edit options on the left side of the style edit window.
6. Use CTRL-S to periodically save your changes
7. Special characters are available for formatting output styles, for example:

"|" is the forced separation symbol (SHIFT+ \) If you do not want text or punctuation to be dependent on the preceding field, use the vertical bar character (|), to of the text from the field.

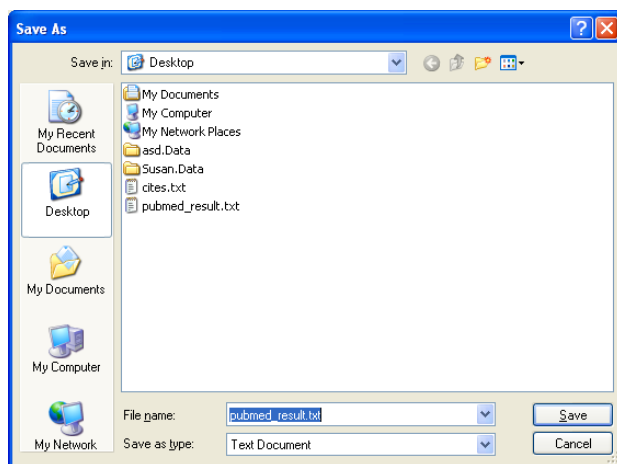
8. Select *Page Numbers* and choose *Abbreviate...Keeping Two Digits*
9. Click *Journal Names* and choose *Full Journal Name*
10. Under *Citations*, highlight *Templates* and delete the field selections, (*Bibliography Number*) Click *Insert Field* and choose *Bibliography Number*.
11. Superscript and Subscript: To select superscript, highlight the words *Bibliography Number*, go to the *Edit* drop-down menu, and choose *Style/Superscript*.
12. Under *Bibliography*, choose *Author Name* and change *First Author* to *Smith Jane*. Next, change *Other Authors* to *Doe John*. Lastly, change *Initials* to *AB*
13. Under *Bibliography*, choose *Layout*. Click *Insert Field* and choose *Bibliography Number*, include a period and use *Insert Field* to add *Tab*. Also, make sure *Hanging Indent* is set to *All Paragraphs*.
14. Under *Bibliography*, select *Templates*, and erase all the entries within the *Journal Article* field entry box. Use *Insert Field* to add each field, including punctuation, using the following citation as your guide:
 1. Jain SI, Tung RS, *et al*: Pharmacological therapy for acute respiratory distress syndrome *Nature Medicine*. 2006; 17: (2)158-68.
15. Place a forced separation bar to the right of the *Volume* field and before the colon. Next, add a left and right parenthesis, and insert *Issue* in between. Add a forced separation bar to the right of the left parenthesis, then add *Pages*. The changes should look like this: *Volume|:(Issue)| Pages*.
16. Save your changes and preview your new style in your EndNote library.

Appendix 1: Importing Citations: Downloaded Citations from PubMed

1. Connect to PubMed from Lane's homepage (<http://lane.stanford.edu>)
2. Run your search in PubMed. After you've selected some citations to download (by clicking in the checkboxes to the left of the author name, click *Send to* and select *File*. Next, change *Format* to *MEDLINE* and click *Create File*.



3. The default name for your downloaded references is "pubmed-result.txt" Click on "Save" to save the references.



4. Start EndNote and open a Library (new or existing).
5. Within EndNote, go to *File* and choose *Import* to import the citations you downloaded
6. Use the *Choose File* button to locate your downloaded citations. Next, be sure that the *Import Option* is set to *PubMed (NLM)*. If it's not, locate the *Other Filters* option within the list and use it to retrieve the filter for *PubMed (NLM)*. Click on the *Import* button to import the citations. That's it!

