

Basic functions in EndNote X8

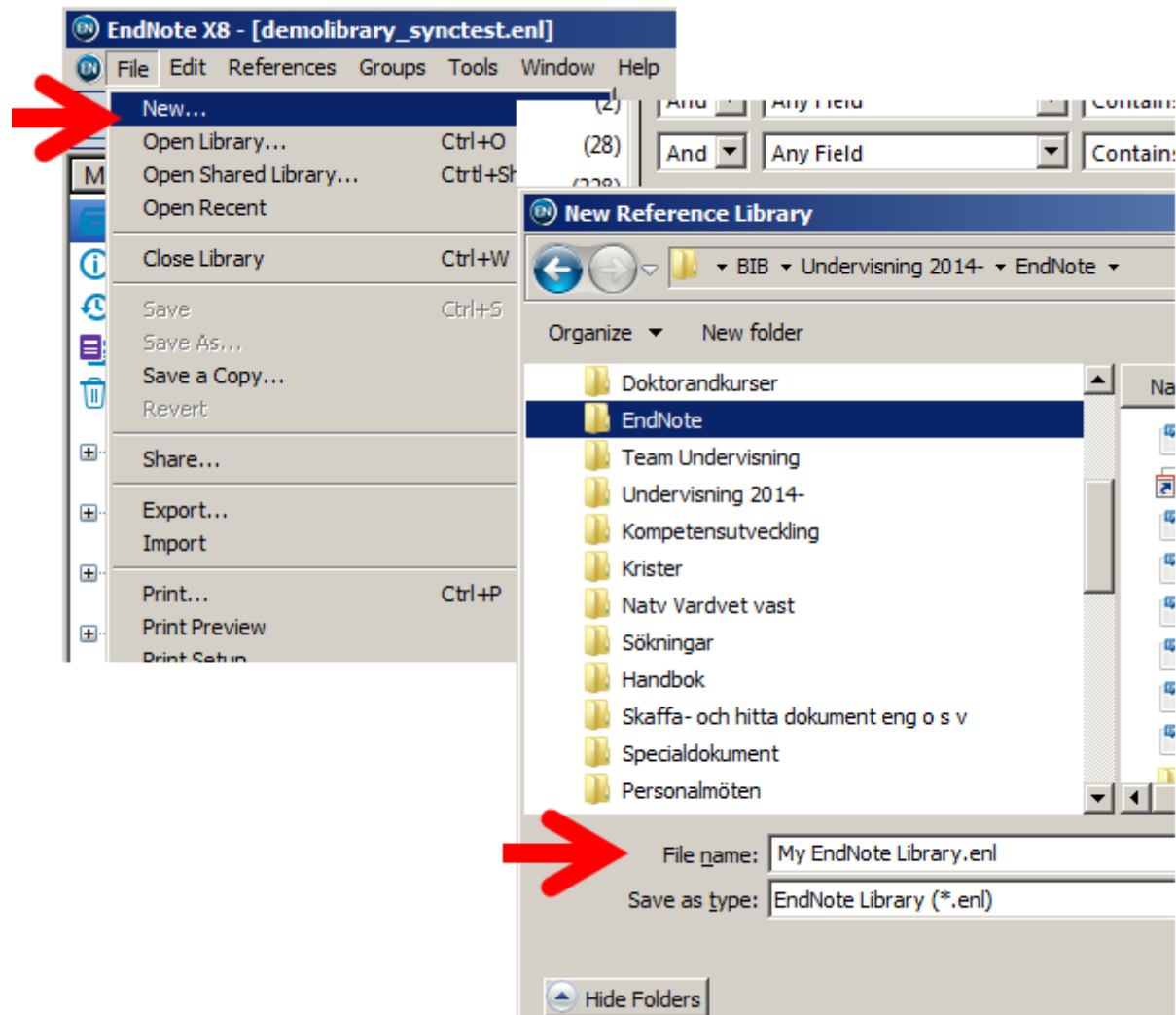
(similar to X6/X7, X9, 20 and 21)

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Create a library

In EndNote: select File, New, give the file a name and select where to store it.



Make sure that all the references that belong to a document you are working with are available. It is a good idea to have a specific file with the references (a library) and copy it now and then. It is possible to create groups of references in the same library.

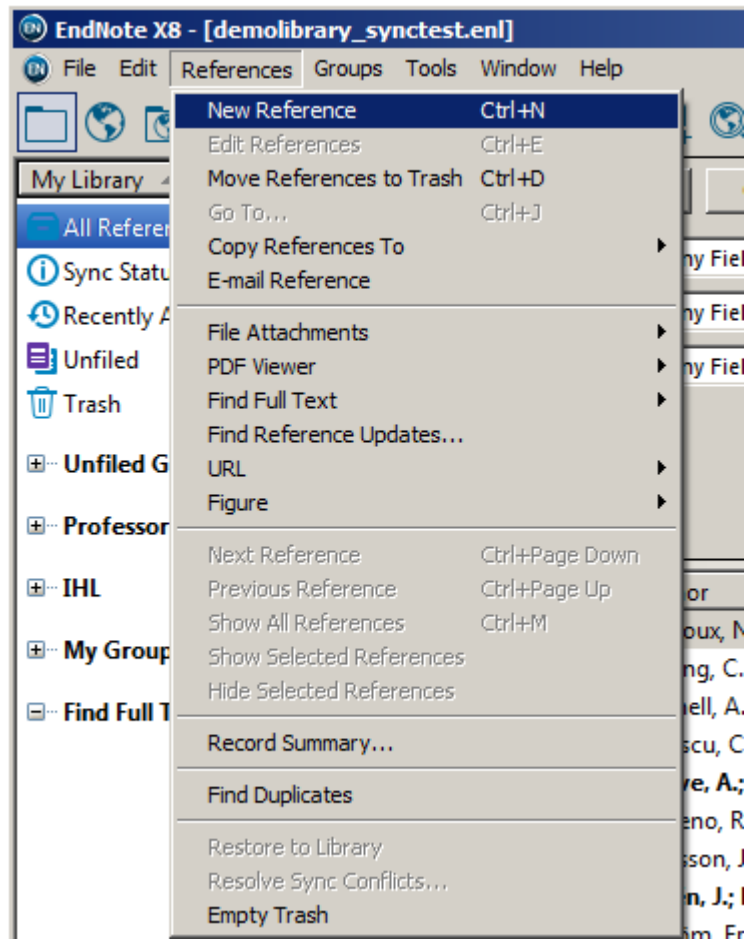
The contents of a group can be shared with other users in the online version known as EndNote Web. A library in EndNote Web can be synced with a local file used in EndNote desktop under Edit>Preferences>Sync. References can then be sent to EndNote Web or imported through Tools>Sync (or button).

More information about EndNote and EndNote Web (Online):

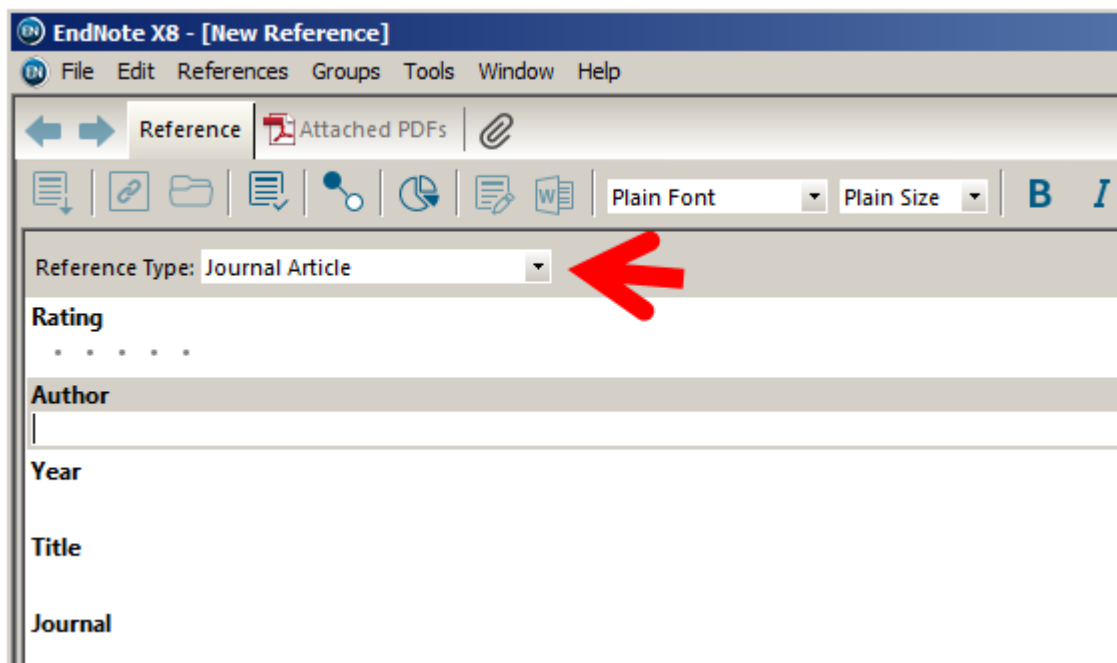
<https://www.his.se/en/library/write-and-cite/referencing/endnote/>

Enter references manually

In EndNote: select References, New Reference, Reference Type (to select type of reference).



Journal Article is the default setting, but other reference types can be selected in the dropdown menu for Reference Type under New Reference.



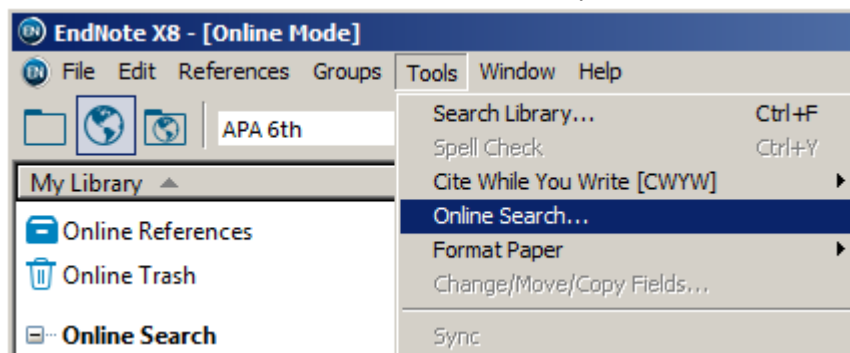
Import references

There are several possibilities:

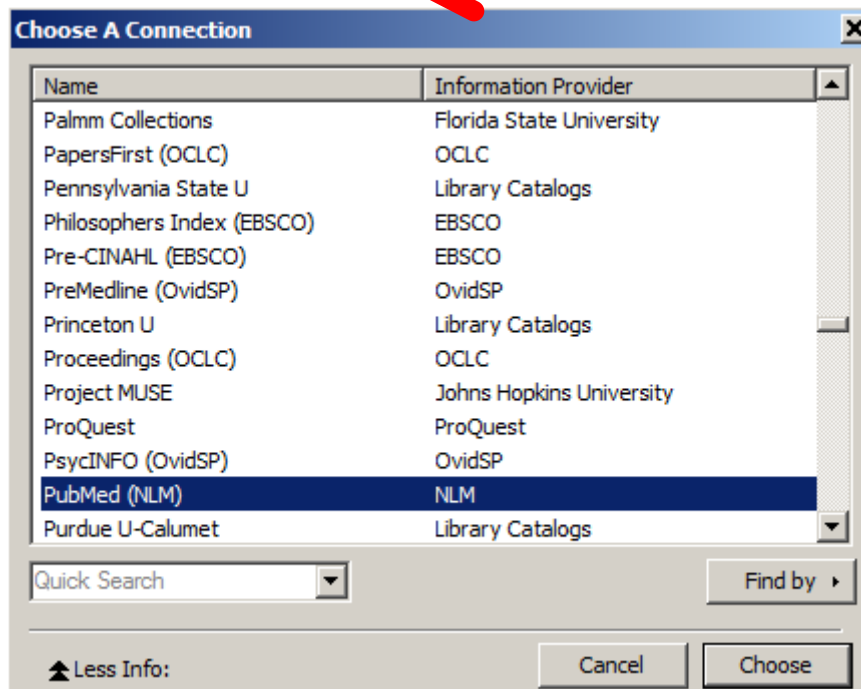
- Directly from another database to EndNote
- Via interface in EndNote (for searching external databases, e.g. Medline/PubMed), go to Tools and select Online Search
- Indirectly from another database (by creating an import file from the database and import data from it in EndNote), go to File, then Import and select File

Import via interface in EndNote

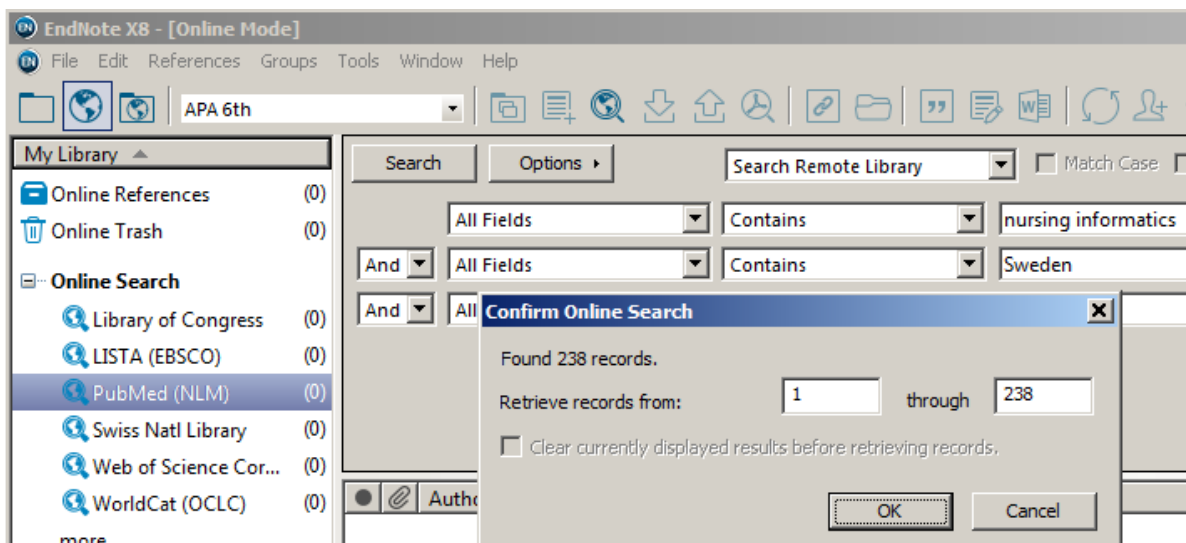
Under Tools, select Online Search. This marks the globe which means that search results in external databases are treated separately (the folder and globe symbols are not included in newer versions).



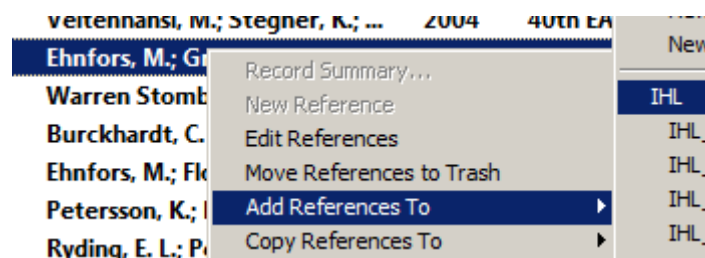
Then select database.



Enter search instructions and show records.



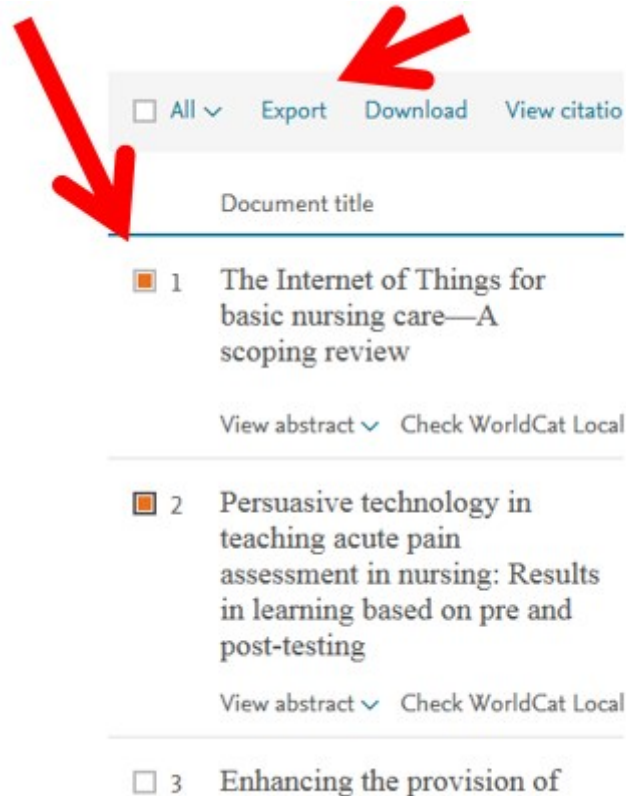
Mark one or several references, right click and copy/transfer to a library or group in a library.



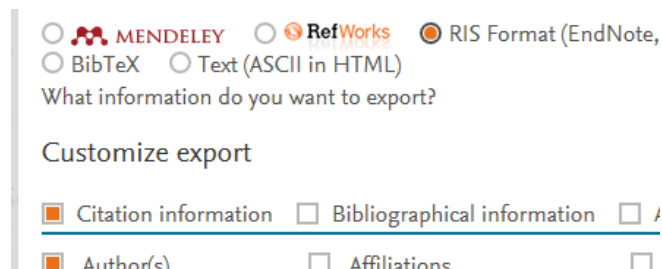
[Import indirectly from database \(file import\)](#)

Example from Scopus:

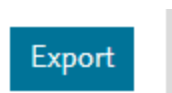
Search and mark references in Scopus. Click Export.



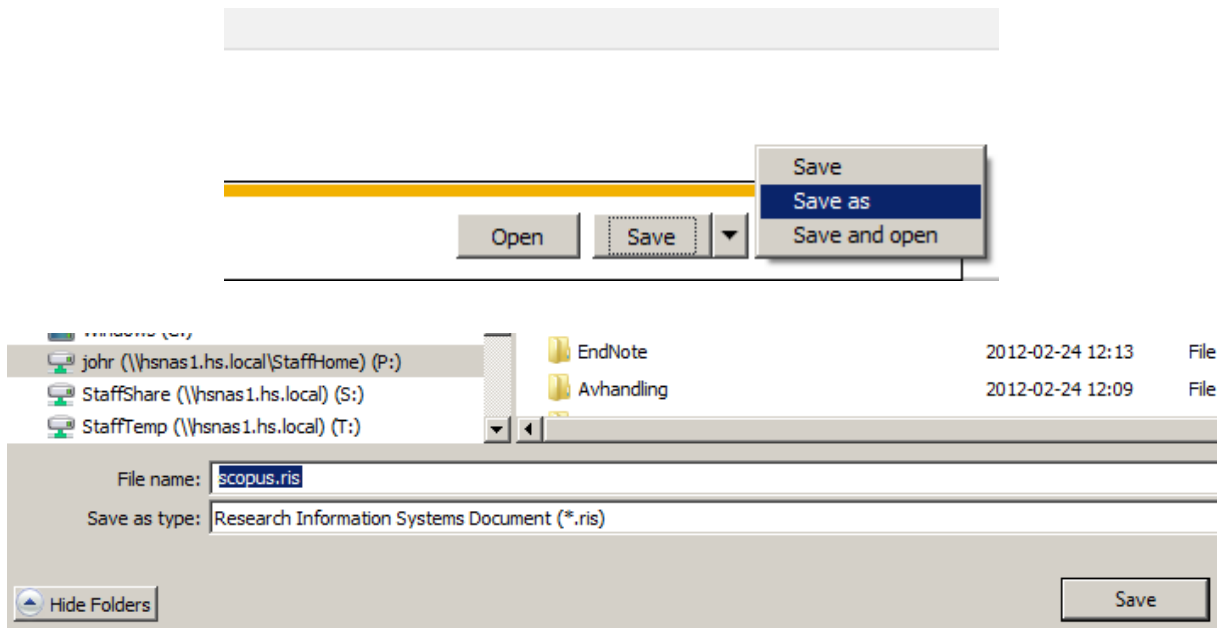
Select RIS Format.



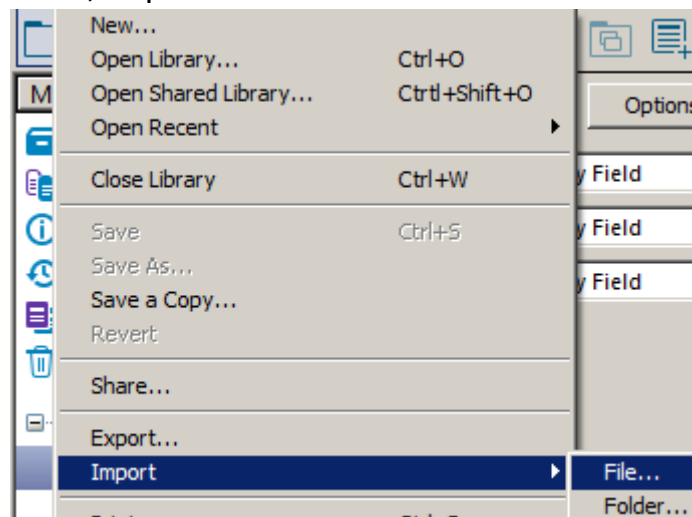
Click the Export button.



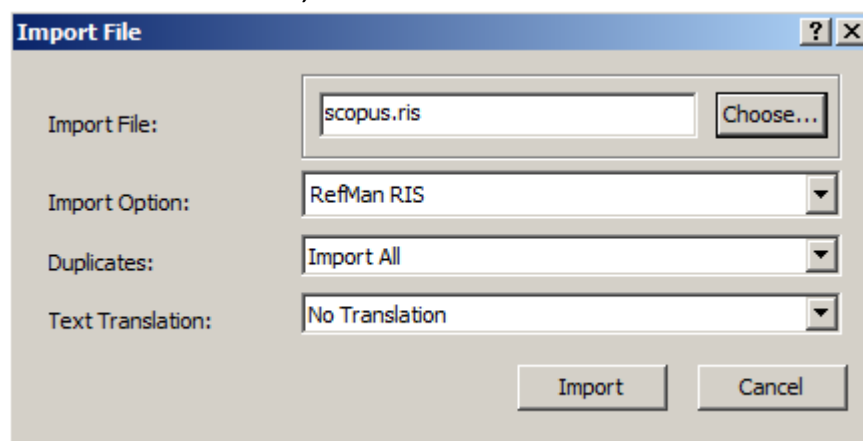
Save the file with a suitable name at a suitable location.



In EndNote: select File, Import and File.



Then select file and file format, which should be RefMan RIS.

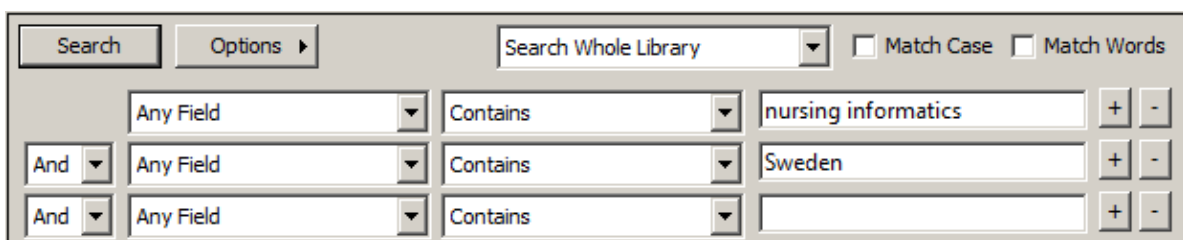


Search libraries in EndNote

To search your library, click the folder symbol or the symbol with the globe and folder. The latter gives access to your own database as well as online searches. Select Tools and then Search Library.

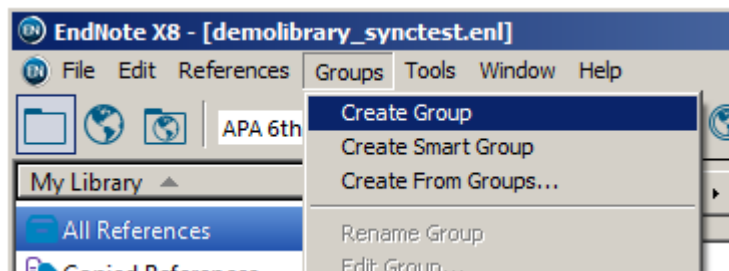


Enter search instructions in the search form. (EndNote 20: Library>Adv Search)



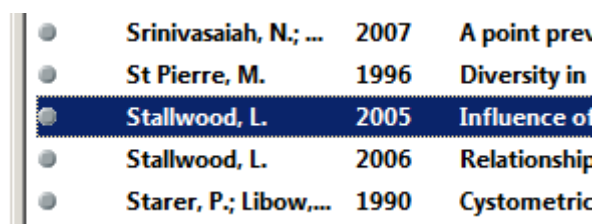
Create groups in a library

Groups can be used to sort references for different purposes. The same reference can be copied to several groups. Select Groups and then Create Group. Name the group that has been created in the menu to the left. Search, (right) click and add references to the group you want to copy them to.

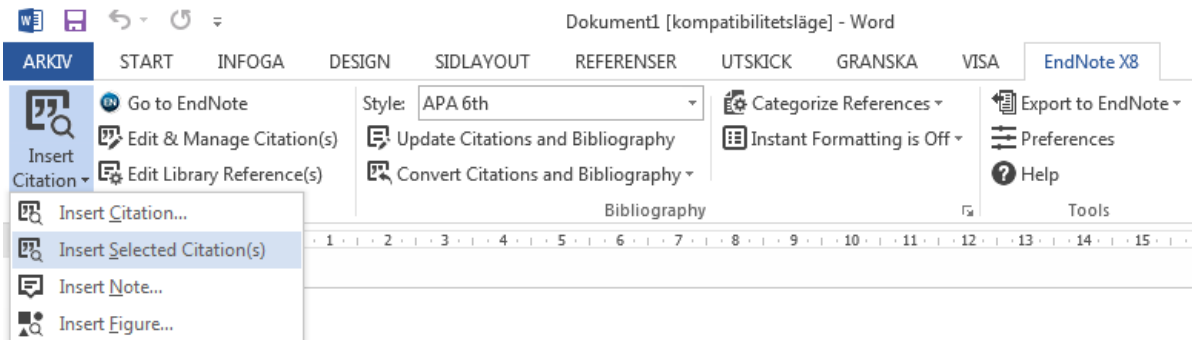


Insert and edit citations

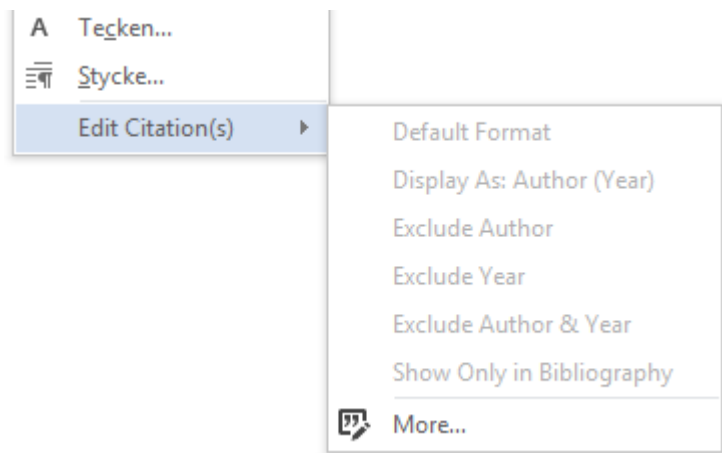
In Word, put the marker where the citation is intended to be, then select references in EndNote. Use the Control button and mouse click to mark several references.



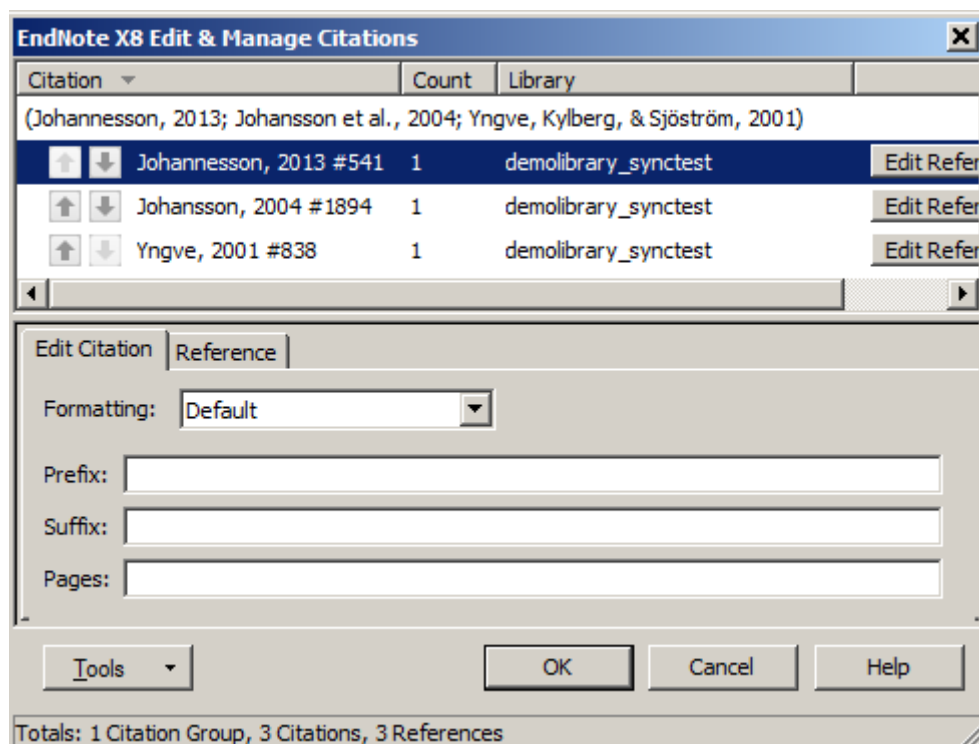
Then go to the EndNote tab in Word, select Insert Citation and then Insert Selected Citation(s).



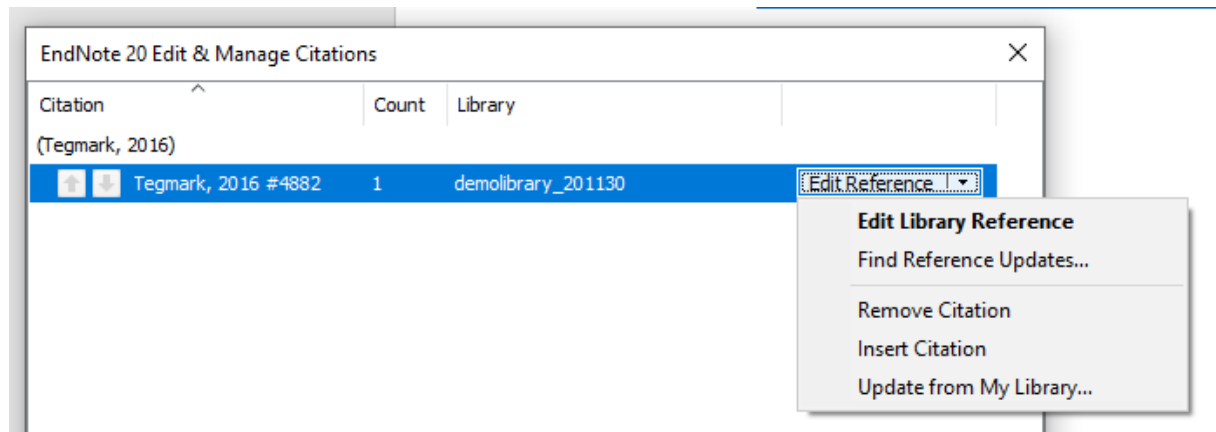
Citations in Word can be edited by right-clicking in the citation's parentheses. After right-clicking, select Edit Citation(s) and then More.



In the window that opens under More, it is possible to reformat the citation and, among other things, remove author, add prefix, suffix and page numbers.

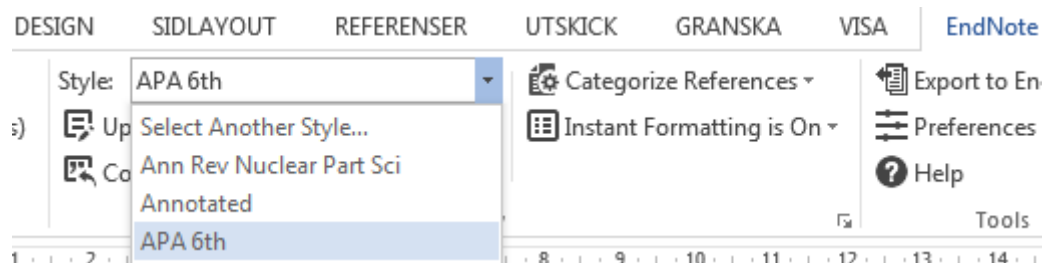


In the window under More, it is also possible to see from which library references are inserted (e.g. to make sure that a specific source/citation is represented by one specific reference from one library). You can have several libraries, and a document can have its own "Traveling library" for the document's references, but it is wise to use only one library, and edit the references directly in that library if needed.

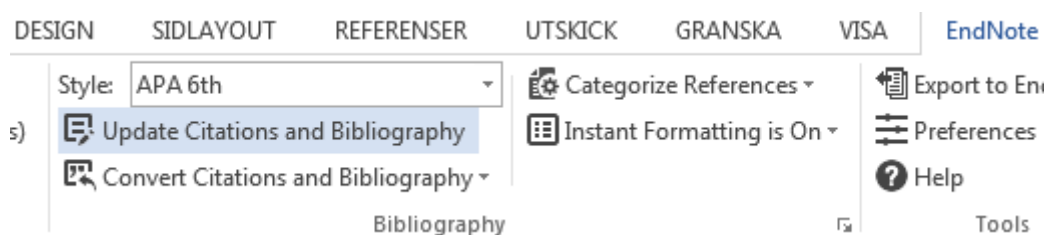


Select style and update reference list

It is possible to change reference style in Word under the EndNote tab by selecting Style then select another style in the list there, or search for another style under Select Another Style.

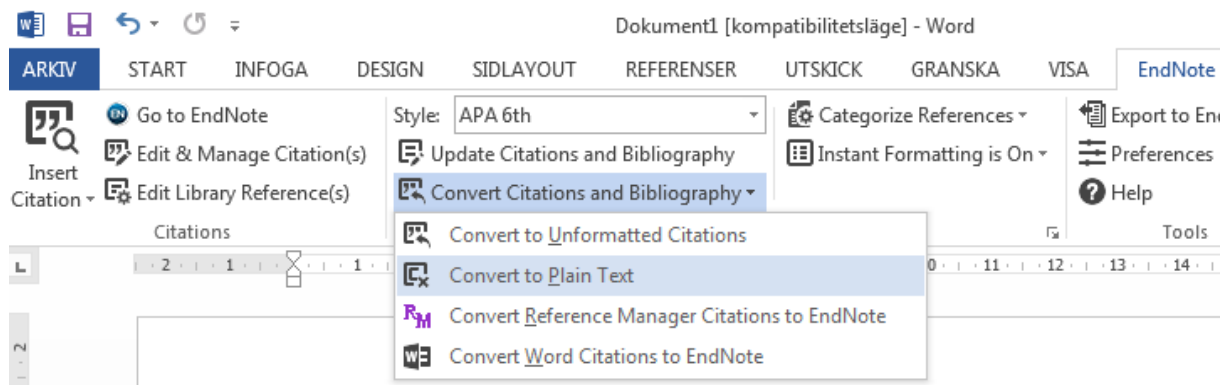


The reference list in the Word document can be updated under the EndNote tab by clicking Update Citations and Bibliography.



Create a Word document copy disconnected from EndNote

Go to the EndNote tab in Word, click Convert Citations and Bibliography and select Convert to Plain Text.



Click OK and save a copy of the Word document. The copy will be disconnected from EndNote and can thus be read and edited as an ordinary Word document, independent of EndNote. This is useful for sharing the document with others who have no access to EndNote.

