



## EndNote X: Step by Step Guide for UC Users

### Part 1: Introduction to an EndNote Library

- 1) Open EndNote X
  - A) The first screen that appears gives three options: Create new library, See what's new in EndNote X and Open Existing Library
  - B) Select Create new library and save the file name as Tutorial.enl
  - C) Click Save

### Part 2: Changing EndNote Preferences

- 1) Set a default library
  - A) Open the Tutorial library
  - B. From the Edit menu, click Preferences
  - C. Highlight Libraries
  - D. Click Add Open Libraries
  - E. Hit Apply, then OK

### Part 3: Searching PubMed from within EndNote

- 1) Connect to PubMed from within EndNote
  - A) Open the Tutorial library
  - B) From the Tools menu, click the Connect submenu, then Connect
  - C) Highlight PubMed (NLM)
  - D) Hit Connect
- 2) Search PubMed, then Copy to EndNote Library
  - A) Enter your search term in the search box. Use the drop down menus on the far right to combine multiple search terms.
  - B) To add another search field, click on the More icon. (If you see Less then it has already been selected.)
  - C) Click "Add Field"
  - D) Hit Search
  - E) When the Search results come up, select OK
  - F) Click Copy all References To and select Tutorial.enl

### Part 4: Importing Reference into EndNote

- 1) **Search PubMed, Save text file, then Import into EndNote**
  - A) Search [PubMed](#), via the Health Sciences Library homepage
    1. Enter your search topic in the search box
    2. Click GO
    3. Change Show from 20 to 100
    4. Change Display from Summary to MEDLINE
    5. Click on the Send To drop down menu and select Text
    6. From the file menu, click Save As and save it as a text document by selecting the Save as Type drop down menu and selecting Text File

7. Click Save
- B) Switch to EndNote: Import PubMed Records
  1. From the File menu, select Import
  2. Click on Choose File, select the file you want, and click Open
  3. Under Import Options, select Other Filters then select harvest-ucdavis and click Choose
  4. Select the option to Discard Duplicates, and No Translation
  5. Click Import

**2) Search CAB Abstracts; Save Text File; Import Into EndNote**

- A) Go to [CAB Abstracts](#), via the Health Sciences Library homepage
- B) Enter your search topic in the search box
- C) Click Search
- D) Once the search results come up, click on the Floppy Disk icon on the right to save
- E) At the top of the screen, choose Export to EndNote, Procite, or Reference Manager
- F) Under Save or Export These Records, choose All Records.
- G) Under Save These Fields, click on the pulldown menu and select Complete Record.
- H) Under Also Save, Field Names with Short Labels is OK
- I) At the top, click OK
- J) Select EndNote and click OK
- K) Select Tutorial.enl and click Open

**3) Search Web of Science, then Import Directly**

- A) Open [Web of Science](#) via the University Library website
- B) Click General Search
- C) UN-select Social Sciences Citation Index and Arts and Humanities Citation Index
- D) Under Topic, enter your search term(s) in the search box. Put linking words (e.g. and, or) in all caps
- E) Click search
- F) Under Output Records, type in the total number the search produces to include all of them
- G) Select Export to Reference Software
- H) Select EndNote and click OK
- I) Open Tutorial.enl and click Open

**4) Search BIOSIS, then import directly**

- A) Open [BIOSIS](#) via the University Library website
- B) Select the General Search option
- C) Enter your search term(s) in the search box. Put linking words (e.g. and, or) in all caps.
- D) Hit Search
- E) Under Output Records, type in the total number of searches to include them all
- F) Click Export to Reference Software
- G) Select EndNote and click OK
- H) Open Tutorial.enl and click Open

**5) Search PsycINFO, save as text file, then import into EndNote**

- A) Search [PsycINFO](#)
  1. Open the PsycINFO database via the University Library website
  2. Enter your search terms in the first column of each row in the search box
  3. In the search options, select drop down box to "Title, TI="
  4. Hit Search

5. Click Save/Print/Email
  6. Hit Save, then Save again in the dialogue box that opens
  7. Save this file as a text file (.txt)
  8. Close the application
- B) Switch to EndNote, then Import PsycINFO
1. Open EndNote, and select to open an existing library: Tutorial.enl
  2. From the file menu, click Import
  3. Import the data file by clicking Choose File, select desired file, then click Open
  4. Under Import options, Click Other Filters, and select PsycINFO (CSA)
  5. Hit choose
  6. Select Discard Duplicates and No Translation in options
  7. Hit Import

## 6) Search UC Davis Harvest Library Catalog, save text file, import to EndNote

- A) Open up the [UC Davis Harvest Catalog](#) from any library home page
1. In the Basic Search Box, enter search terms
  2. For Search Field, select Keyword(s) Anywhere
  3. Hit Search
- B) With the search results
1. In the Options list, choose Select All
  2. Click Add to My E-Shelf, then go to the top of the screen and click on My E-Shelf
  3. Select at least one record then select Save/Mail. (To save all records select one record then wait for the next window to select all)
  4. Under Records select All (Basket)
  5. Under Record format, find the pull-down menu beside Select Predefined Format and select MARC (tagged for bibliographic management)
  6. Click on Go
  7. From the file menu, click Save As and save it as a text document by selecting the Save as Type drop down menu and selecting Text File.
- C) Switch to EndNote: Import Harvest Records
1. From the File menu, select Import
  2. Click on Choose File, select the file you want, and click Open
  3. Under Import Options, select Other Filters then select harvest-ucdavis and click Choose.
  4. Select the option to Discard Duplicates, and No Translation
  5. Click Import

## 7) Search UC Melvyn Library Catalog, Save text file, then import to Endnote

- A) Search [Melvyn Library Catalog](#)
1. Open up UC Melvyn Library Catalog to do a search
  2. Enter search term(s) in the search box
  3. Hit Search
  4. When the results come up, click Print/Email
    - a. Step 1: Preview/Print
    - b. Step 2: All
    - c. Step 3: Long (Tagged)
    - d. Step 4: All
    - e. Step 5: Save as ASC II format
    - f. Click Go
    - g. Step 6: Preview/Print

5. Go to File, select Save As, name the document and in the Save as Type drop-down menu, select Text file and click Save
- B) Import into Endnote
1. Open Endnote and Open Existing Library, Tutorial.enl
  2. From the File menu, select Import
  3. Import the data file by clicking Choose File and selecting a file. Click Open
  4. Under Import Options, click Other Filters, then select U of California
  5. Click Choose
  6. Select the Discard Duplicates and No Translations in options
  7. Hit Import

### **Part 5: Entering References Manually**

- 1) Create a new record via keyboard
  - A) Open the Tutorial Library
  - B) From the References Menu, click New Reference
  - C) For Reference Type, select Book
  - D) Enter information under:
    1. Author: Lo, Bernard
    2. Year: 2000
    3. Title: Resolving Ethical Dilemmas: a guide for Clinicians
    4. City: Philadelphia
    5. Publisher: Lippincott Williams and Wilkins
    6. Keywords: Ethics, Medical; Decision Making; Life Support Care; Physician-Patient Relations
  - E) From the File menu, click Close Reference

### **Part 6: Creating a Bibliography**

- 1) Search for a set of references
  - A) From the References menu, click Search References
  - B) Enter your search term(s)
  - C) Hit Search
- 2) Print the bibliography
  - A) Select any style from the output style list on the main toolbar
  - B) From the File menu, select Print
  - C) Hit OK
  - D) From the References menu, click Show All References

### **Part 7: Using EndNote While Writing a Paper with Microsoft WORD**

- 1) Create a new manuscript and bibliography with cited EndNote references
  - A) Make sure the EndNote Tutorial library is open
  - B) Open a new Word document and type a sentence to be referenced.
  - C) From the Tools menu, click the EndNote X submenu, then Find Citation(s)
  - D) In the EndNote Find Citations dialog box;
    1. Use the Find box to locate one of your authors
    2. Click Search
    3. Click Insert
  - E) Add another sentence to be referenced
  - F) From the Tools menu, click EndNote X submenu, then Find Citation(s)
  - G) In the Find Citations box:
    1. Type in your subject

2. Click Search
  3. Highlight a Reference
  4. Click Insert
- H) Add another sentence to be referenced
- I) From the Tools menu, click EndNote X submenu, then Find Citation
- J) In the box:
1. Type one of your author's names and their copyright date
  2. Click Search
  3. When the citation you want appears, hit Insert
- K) From the File menu, select Save as and save the document as manuscript.doc.
- 2) Format the manuscript and bibliography
- A) From Microsoft Word's Tool menu, click the EndNote submenu, then Format Bibliography
- B) In the dialog box:
1. Select Format Document: manuscript.doc
  2. With output style: click Browse: select J Small Animal Practice
  3. Click OK in both boxes
- 3) Change the bibliographic style
- A) From Word's Tool menu, click the EndNote submenu, then Format Bibliography
- B) In the dialog box:
1. Select format document: manuscript.doc
  2. With output style: J Amer Vet Med Assn
  3. Hit OK in both boxes