

EndNote 1-2-3 Easy!
Second Edition

Abha Agrawal

EndNote 1-2-3 Easy!

Reference Management for the Professional
Second Edition

 Springer

Abha Agrawal
Kings County Hospital Center
451 Clarkson Avenue
Brooklyn, NY 11203
USA
agrawal.abha@gmail.com

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For Mummy and Papa

Preface

ABOUT THE BOOK

Reference management is the process of storing, managing, retrieving, and citing references from various sources. Learning effective reference management is critically important for healthcare and biomedical professionals as it is a major component of the process of scientific manuscript writing. Effective reference management is also useful for such other purposes as maintaining a list of scientific references on a topic of interest, delivering presentations, preparing for journal clubs or case conferences, and teaching activities.

Scientific manuscript writing is an extremely common task, as evident by the tens of thousands of articles added per month just to one biomedical database — MEDLINE. Even this is a tiny fraction of the actual amount of writing activity, as much of what is written does not get published. In addition, reference management is useful for writing reports, grants, and other non-journal articles.

A number of reference management software programs are available these days to make this challenging task simpler by harnessing the power of information technology. EndNote® is one of the most popular software program among biomedical and healthcare professionals.

The purpose of this book is to educate readers to effectively and efficiently use EndNote. The book provides step-by-step instruction on using EndNote (version X1) to create a personal digital library of scientific references and to create an accurately formatted bibliography in a manuscript.

The book will help novice users in rapidly learning to perform important reference management tasks using EndNote. It will enhance the skills of experienced users in performing advanced tasks such as using EndNote to retrieve references from Internet databases, electronic journals, or other electronic resources. For nonusers of technology, I hope it will stimulate their interest in exploring the use of EndNote in their professional activities.

While EndNote is generally a user-friendly program, professionals often find that there is a steep learning curve which prevents them from trying to use it for their work. They often cannot get over the initial hassle and time investment of trying to learn the user interface and other

intricacies of a new software program. Software manuals are generally cumbersome to read and are not specifically designed for the needs of healthcare and biomedical professionals.

The book is written keeping the requirements, skills, and time constraints of healthcare and biomedical professionals in mind. All chapters in the book are task-oriented; you can simply use the “Table of Contents” or the “Index” to find the task you would like to perform without reading the entire chapter. I have used ample illustrations — including computer screenshots and flowcharts to provide a visual display of how to perform various tasks. There is a “Quick Summary” at the beginning of each chapter that summarizes the most important commands. You will also find “Cheat Sheets” right after the table of contents to familiarize you with the important functions and screens of EndNote.

There is a CD accompanying the book that contains a sample EndNote library to get you started if you have not had a chance to create your own library. The CD also contains individual files of all the cheat sheets, figures, and tables in the book, which are particularly useful if you are an EndNote instructor. Also included in the CD are sample manuscript templates for some selected biomedical journals and a compendium of hyperlinks to useful EndNote resources.

The book derives from my extensive experience as a user of EndNote as well as from the practical insights gained by helping my colleagues over the years in the use of the software to get their manuscripts submitted in proper format and style. It stems from my understanding of the problems faced by novice users trying to learn a new program as well as expectations of more experienced users as they optimize the use of this program. I hope that sharing this experience with you will help you get over the initial steep learning curve of using EndNote.

Disclaimer: I do not endorse any company or its products. This book is solely based on my experience and objective analysis.

THIS BOOK IS FOR YOU

- If you write manuscripts that include text references, figures, charts, or tables.
- If you submit articles to scientific journals or other publications and would like to ensure accurate formatting of in-text citations and the bibliography.
- If you would like to minimize the time involved in renumbering and rearranging your bibliography during iterative improvements within the manuscript.
- If you search online databases such as PubMed, Google Scholar, or the Web of Science and would like to store selected references in an electronic database.

- If you read scientific journals online and would like to automatically download citations to selected articles in an electronic library for future use.
- If you would like to generate a list of articles or other citations on topics of your interest for teaching or as reading lists.
- If you teach reference management or EndNote courses.

YOU SHOULD KNOW

You do not need to have any prior knowledge of EndNote or any other reference management program. You do *not* need to be a skilled or experienced computer user. It would be helpful for you to have a basic knowledge of:

- Basic Windows operations such as opening, closing, and saving a file, minimizing and maximizing windows etc.
- Basic use of the keyboard and mouse.
- Basic word processor (e.g. Microsoft Word) operations that you would need for writing your manuscript with or without EndNote.

This book is meant to be used with computers running the Windows® operating system only. Note that EndNote is available for both the Windows and Macintosh® operating systems.


WHAT IS NEW IN THE SECOND EDITION?


The second edition of *EndNote 1-2-3 Easy!* has been updated to include the following new features:

- It provides instructions on using the latest version of EndNote — EndNote X1. All the figures and computer screen shots in the book have been updated to reflect new features in EndNote X1.
- At the beginning of each chapter I have included a “Quick Summary” that encapsulates the most useful tasks described in the chapter.
- Chapter 3, Getting Started with EndNote, includes a more extensive discussion on troubleshooting various EndNote installation problems particularly related to the integration of EndNote menu and CWYW commands in Microsoft Word. This is one of the commonest problems faced by EndNote users.
- Chapter 5, Entering References into an EndNote Library, includes a new section on linking files to references in EndNote using relative and absolute links.
- Chapter 6, Managing References in an EndNote Library, includes a new section on reference groups that allows improved organization of references.
- Chapter 7, Using EndNote with Internet Databases, has been updated to include information on using EndNote with Google Scholar.

- Chapter 10, EndNote for PDA Computers, has been updated to provide information about using EndNote with hand-held computers (PDAs) based on Windows Mobile software, such as PocketPC. The first edition covered only Palm operating system-based PDAs.
- There is a new Chapter 11, EndNote Web. This chapter provides detailed instructions on using the new web-based version of EndNote software.

CONVENTIONS USED IN THIS BOOK

 **Technical Tip:** These tips will help you to use a program more efficiently and indicate features of the program that may not be obvious.

 **Alert:** When you see an alert, read it carefully — it will help you avoid possible problems in performing a task.

Typographic Conventions

Italics are used for menu commands and other commands that will help you interact with the computers. For example, “*Edit > Preferences*” means you will click on “Edit” in the menu bar and then on “Preferences” in the submenu.

URLs

A word about the URLs used in this book. I have taken extra caution to make sure that the URLs point to the correct webpages and that the URLs are current as of this writing. However, given the volatile nature of web publishing, you may occasionally find that a URL is nonfunctional. Using a search engine like Google should help you find the correct one.

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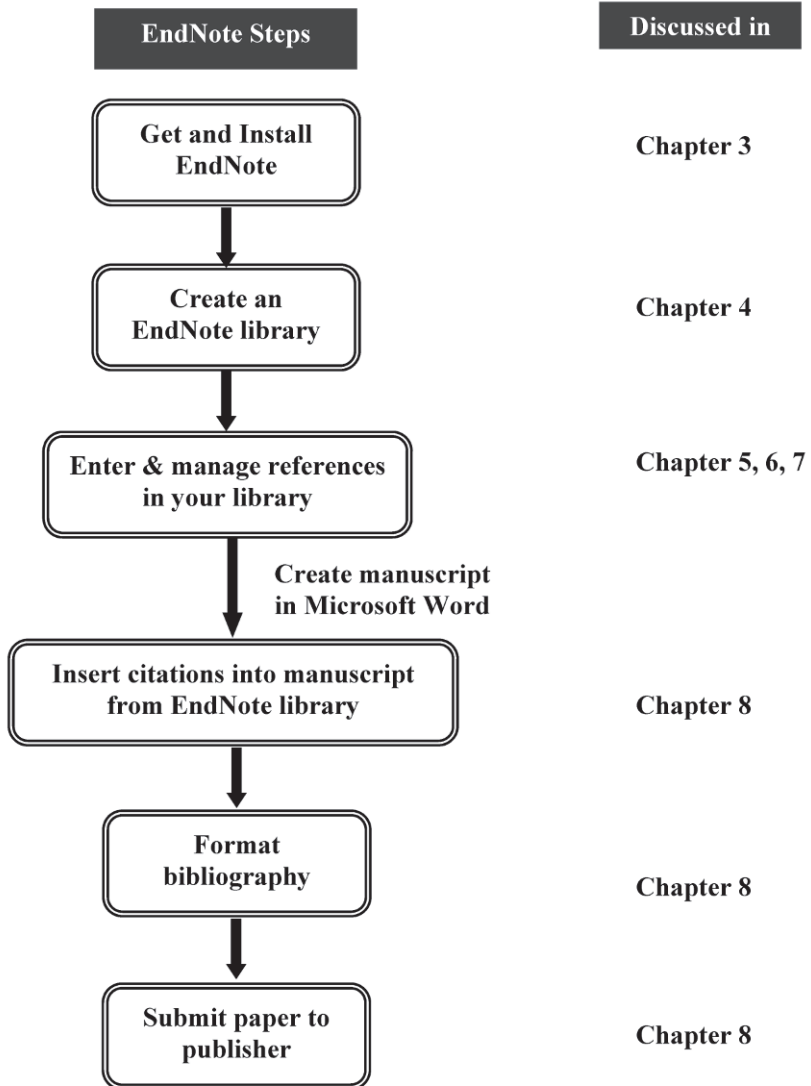
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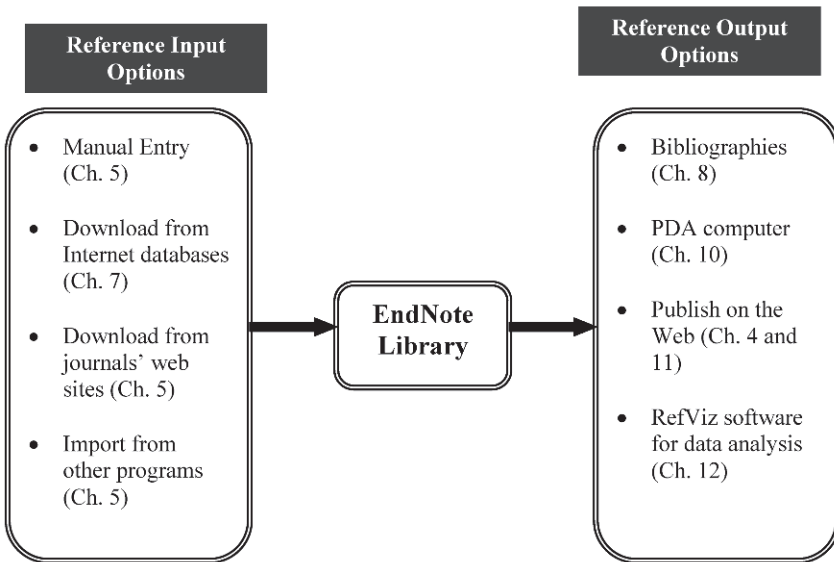
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Cheat Sheets for EndNote

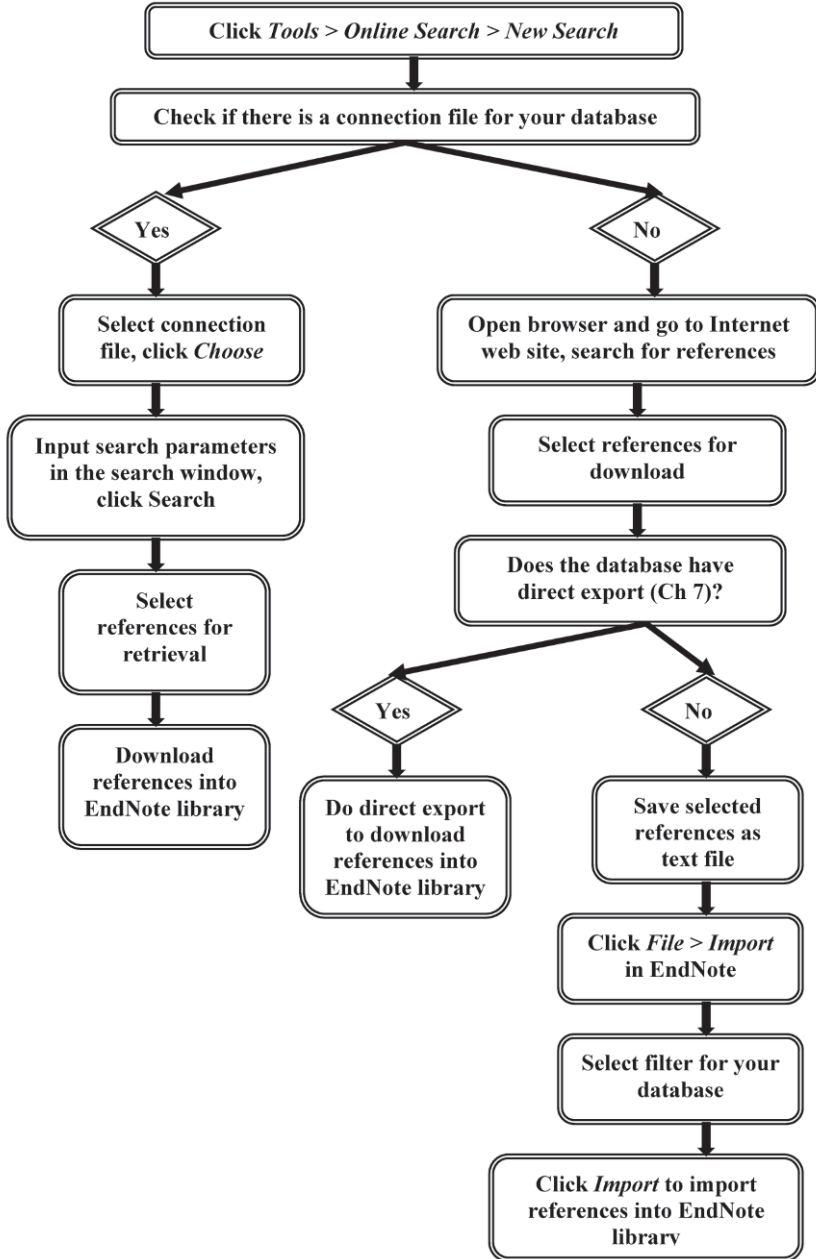
An Overview of Using EndNote for Reference Management



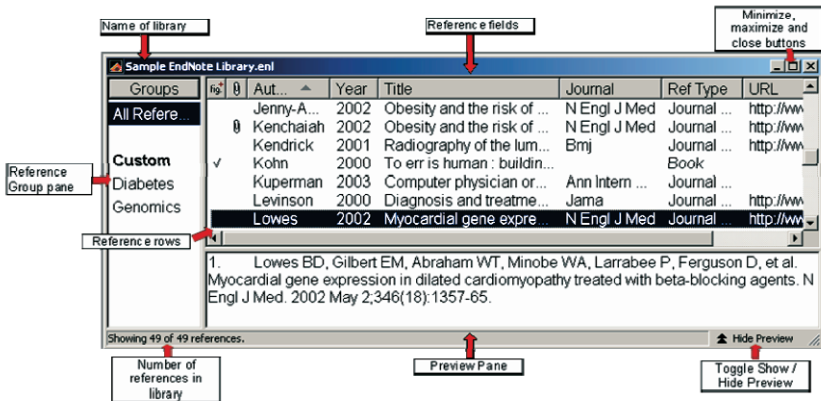
Input and Output Options for EndNote Library



Steps in Using EndNote with Internet Databases



Main EndNote Window



Keyboard Shortcuts

EndNote Keyboard Shortcuts

Keyboard shortcuts help you work in EndNote with minimal use of the mouse

Key command	Function
CTRL + N	Create a new reference
CTRL + CLICK	Select more than one reference
SHIFT + CLICK	Select a range of references
CTRL + E	Open selected reference(s)
CTRL + W	Close the active window
CTRL + SHIFT + W	Close all windows of the same type as the active window
TAB	Select the next reference field in an open reference
SHIFT + TAB	Select the previous reference field in an open reference
CTRL + D	Delete a reference
CTRL + A	Select/unselect all references
CTRL + F	Open search library window
CTRL + Y	Launch the spell-checker (at least one reference must be open for this to work)
CTRL + R	Launch Change Text command
CTRL + H	Show all references
CTRL + G	Opens the website for the URL field in an open reference
CTRL + J	Find a word or phrase in an open reference

Keyboard Shortcuts to Access the Main Menu Bar

Use these keyboard shortcuts to access the main menu bar of EndNote and then use the down arrow key to access the submenu items. For example, by pressing ALT + F you will access the File menu, and then press the down arrow key to access the such submenu items such as New, Open, Close Library, etc.

Key command	Access to menu item
ALT + F	File
ALT + E	Edit
ALT + R	Reference
ALT + T	Tools
ALT + W	Window
ALT + H	Help

Keyboard Shortcuts to Access CWYW

NOTE: You can create custom shortcuts by setting CWYW preferences (Chapter 8). This is especially useful for commands for which there is no key defined by default, such as Format Figure.

Key command	CWYW command
ALT + 1	Return to Word or Return to EndNote
ALT + 7	Find Citation(s)
ALT + 3	Format Bibliography
ALT + 2	Insert Selected Citation(s)
ALT + 6	Edit Citation(s)
ALT + 5	Insert Note
ALT + 0	Edit Library Reference
ALT + 8	Export Traveling Library
ALT + 9	CWYW Preferences

Keyboard Shortcuts for Standard Windows Commands

Key command	Function
CTRL + S	Save
CTRL + P	Print
CTRL + Q	Exit a program
CTRL + X	Cut
CTRL + C	Copy
CTRL + V	Paste
CTRL + B	Turn bold on or off
CTRL + U	Turn underline on or off
CTRL + I	Turn italics on or off
CTRL + Z	Undo
CTRL + O	Open a file
F1	Launch the Help menu
CTRL + Esc or Windows	Open or close the Start menu
ALT + Tab	Switch back to a running program
Hold ALT, Press Tab repeatedly	Switch to another running program
Windows + E	Open Windows Explorer to My Computer
Windows + D	Minimize open windows or restore minimized windows
ALT + F4	Close an open window
Shift + F10	Open the right-click menu
CTRL + Home	Go to the beginning
CTRL + End	Go to the End