EndNote: Advanced

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Leon S. McGoogan Health Sciences Library



Outline

- 1. Sharing libraries and groups
- 2. Editing citation styles
- 3. Tips & tricks on entering citations into EndNote
- 4. CWYW
 - 1. Unformatted citations
 - 2. Convert to Plain Text
- 5. Exporting citations from EndNote

Objectives

By the end of this session, participants will be able to:

- 1. Identify three methods to share citations with colleagues.
- 2. Create citations and citation styles.
- 3. Utilize two Cite While You Write advanced features in Word.



Sharing

Why Share Your Library?

- Collaborating on a project
 - Add citations, PDFs, notes
- Co-authoring a research paper
 - Add citations to the research paper
 - Make changes to the document, updates citation order
- Reviewing a paper (advisor, etc.)
 - Add citations to the research paper
 - Make changes to the document, updates citation order

Sharing Your EndNote Library

1. Create your EndNote Online Account

	Sign in to continue with EndNote
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	Upgrade or create your two-year EndNote account to get the latest features and enable Sync. Enable Sync
Read / L Referen Using an End Sorting Learn more	dNote account makes it easy to get the latest features and keep your library in sync. to our Terms of Use and Privacy Statement.
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Sharing Your EndNote Library

- 2. Sign into your EndNote Online account on the desktop
 - a. Go to Edit > Preferences (Windows); EndNote > Preferences (Mac)
 - b. Enter your EndNote account information
 - c. Click OK
 - d. You can only sync 1 EndNote library per account! (does not include shared libraries)

Change Case Display Fields Display Font	Synchronize your data with your EndNote account. Learn more	
Duplicates Find Full Text Folder Locations	Upgrade or create your two-year EndNote account to get the latest features and enable Sync.	
Formatting Libraries PDF Handling Read / Unread	EndNote Account Credentials	
···· Reference Types ··· Sorting ··· Spell Check	E-mail Address:	
Sync Temporary Citations Term Lists URLs & Links	Sync this EndNote Library	
	Sync Automatically	

Sharing Your EndNote Library

3. Share your entire library and provide Read & Write permissions

- 1. File > Share...
- 2. Enter email address (they MUST have an EndNote online account set up)
- 3. Click Invite
- 4. Invited members will receive an invitation and instructions on how to accept a request

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Accepting a Shared Library

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	To accept this invitation and access Teresa Hartman's library, you must have EndNote X7.2 or later installed, and we strongly recommend using EndNote 20 for the best experience.	

Accepting a Shared Library

To accept this invitation, sign in using the same credentials you use when accessing EndNote online or syncing your desktop library, or create a new account. To access this shared library you must have EndNote X7.2 or later installed.

Create an EndNote account

Sign In with your EndNote account

Email		First Name *	
Password		Last Name *	
Accept		Email *	
Forgot your EndNote password?	OR		
		Password *	

- 1. EndNote Desktop > File > Open Shared Library
- 2. Select the shared library; a new window will open
- 3. If the shared library doesn't appear, sync your EndNote account

Why Share an EndNote Group?

- If you use your library for multiple projects, you can share a specific group. Does not share the entire library.
- Collaborators can edit, add, and view citations
- Collaborators can add citations from a shared group to a Word document

Cannot view attached PDFs; only in shared libraries

Sharing EndNote Groups

- 1. Create an EndNote online account/Log in with existing account
- 2. Select the group you want to share and click the **Share this Group** icon

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Sharing EndNote Groups

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		2 Invite Close

- Enter the individuals email address and click invite
- 2. Set permissions
- Invitees must have an EndNote Online account

Accepting a Shared Group

Right-click or tap and hold here to download

Cindy null has shared an EndNote group, shared project, with you.

To access this group, create or log into your EndNote online account at http://my.endnote.com

Don't have EndNote for your desktop yet? Get the latest version now to share whole libraries, create your own bibliographic styles, and more [endnote.com].

Learn more about sharing your research using EndNote [endnote.com].

Accepting EndNote Groups

1. When you have accepted a shared group request, go to EndNote Online to access

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	B Harpin, Scott 2020	Creating COVID-19 alternate care site trainings for interprofessional teams Public health nursing (Boston, Mass.) Added to Library: 16 Mar 2023 Last Updated: 16 Mar 2023 Go to Record Click Here for Full Text					
	Bolden, Norman 2012	Making the case for obstetric "response teams" and simulation in labor and delivery: management of catastrophic amniotic fluid embolism during labor Journal of clinical anesthesia Added to Library: 16 Mar 2023 Last Updated: 16 Mar 2023					

Manage Your and Others Groups



Cite While You Write (Word)

EndNote Library (Desktop) or Shared EndNote Library

1. In Word (EndNote 20 tab), turn instant formatting off

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EndNote Library (Desktop) or Shared EndNote Library

2. Add citations; EndNote code will appear. Good option if you prefer not to work with the reference list at the bottom of the document.



Using Microsoft Teams or Word online? Copy/paste from EndNote Desktop

1. In EndNote, right click and select **Copy** (NOT copy formatted reference)

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Using Microsoft Teams or Word online? Copy/paste from EndNote Desktop

2. Paste the citation where you want it to appear (screenshot is in Teams)



To show formatted citations and reference list.

- 1. Turn Instant Formatting On
- If you are using Teams or Office online, download the document.
 Recommendation: assign one person to manage the citations from here on out.

Adding citations from Shared Groups

- Go to your EndNote Online account
- 1. Select the Organize tab
- 2. Click on Others' Groups
- 3. Check "Use for Cite While You Write" next to the group you want to use.



Adding citations from Shared Groups

- 1. In Word (EndNote 20 tab), turn instant formatting off
- 2. Enter in citations as normal

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Using EndNote Online?

Word > EndNote Tab

- 1. Preferences
- 2. Application tab
- 3. EndNote Online
- 4. Click OK

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a knowledge tool for students to review entries, search for resources, identify knowledge gaps in article, and make any necessary edits {Murray, 2020 #231} [Murray, 2020]. At the University of H at Manoa, health sciences librarians used Wikipedia as a resource to promote health literacy by h

Using EndNote Groups in Teams and Word Online

Manually enter in unformatted citation: {last name, date}

There have been several studies that investigated using Wikipedia in the classroom in academics and academic health sciences. Murray's article investigated using Wikipedia as a platform to teach evidence-based medicine to first-year medical students. For one semester, instructors used Wikipedia as a knowledge tool for students to review entries, search for resources, identify knowledge gaps in the article, and make any necessary edits {Murray, 2020} [Murray, 2020]. At the University of Hawaii at Manoa, health sciences librarians used Wikipedia as a resource to promote health literacy by having [medical students edit specific health topics' Wikipedia articles [Kahili-Heede, 2022]. In this article, the authors have found that allowing students to get into these entries and make any necessary changes improved the quality of the information already online and being viewed and the student's own perceived health literacy [Kahili-Heede, 2022].

Using EndNote Groups in Teams and Word Online

Download Document

- Make sure you are in EndNote Online
- Click Update Citations and Bibliography
 - Formatted citations will appear



Citations in EndNote

Manually Entering in Citations

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Publisher	National Library of Medicine.			
Access Year	2023			
Access Date	March 15			
Description				Y

Check your citation style format:

- 1. Right-click the citation
- 2. Select "Copy formatted reference"

Network of the National Library of Medicine. (2023). *Wikipedia Edit-a-thon: Spring 2023 #CiteNLM Wikipedia Edit-a-thon. National Library of Medicine.* Retrieved March 15 from https://www.nnlm.gov/guides/wikipedia-edit-a-thon

Update Reference Information

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Find Reference Updates

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The available updates are shown on the left and highlighted in blue. "Update All Fields" copies every updated field from the Available Updates to My Reference, replacing anything already existing in the field(s) in My Reference. "Update Empty Fields" copies available updates only when the corresponding field in My Reference is blank. Text can also be manually copied and pasted into fields.

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Editing Citation Styles

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Wikipedia use amongst medical students-new insights into the digital revolution

U. K. Allahwala, A. Nadkarni and D. F. Sebaratnam

Medical teacher 2013 Vol. 35 Issue 4 Pages 337-337



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Editing Citation Styles

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- 1. Place your cursor where you want the new field to go (ex: Type of Article).
- 2. EndNote will save a COPY of the citation; it will not replace the original
- 3. Search for existing output styles online: <u>https://endnote.com/downloads/styles/</u>

Exporting from EndNote

Export from EndNote (RIS)

Create an RIS file of your EndNote Library

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Journal Article	N. Selwyn; S. Gorard		2016	Stud	dents' use of Wikipedia as an academic resource—P		The
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Resources

- <u>EndNote Expert features tutorials –</u> <u>Clarivate</u>
- EndNote Output Styles: <u>https://endnote.com/downloads/styles/</u>
- UNMC EndNote Research Guide
 <u>https://unmc.libguides.com/endnote</u>
- EndNote Tech Support: <u>https://support.clarivate.com/Endnote/s/?la</u> <u>nguage=en_US</u>



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