

Lecture Notes of the course

Reference Management with EndNote - Introductory Course -



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We appreciate your feedback.

These lecture notes are being updated regularly. However, should you find that the information mentioned herein is not accurate or you have suggestions for further improvement, we would welcome an email to workshop@ub.tum.de.

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1 Why reference management software - why EndNote?

Reference management software assists you with your academic work and writing. In general, they have three principal functions:

- Collecting bibliographical references and full texts
- Managing literature to maintain an overview even over a longer period
- Automatic citation/referencing and output of reference lists

To view a comparison of common reference management software, see here: <https://media-tum.ub.tum.de/?id=1127579>

Just as for Citavi, there is a campus license for EndNote at TUM. As a TUM student or employee, you can download it for free.

EndNote provides the following benefits:

- The software is in wide use internationally; many databases provide EndNote formats for data export.
- It runs on both Windows and Mac operating systems.
- It provides a web version that allows you to use EndNote anywhere, as well as working as a team.

However, EndNote also has some disadvantages:

- It only offers an English interface.
- The software does not run on Linux.
- It is only compatible with very few word processing programs.

2 Download & installation

EndNote can be installed both on Windows and Mac operating systems. Each user is allowed to carry out a total of three installations.

System requirements for EndNote 20

Windows

- Windows 10 or higher
- at least 2 GB RAM
- approx. 600 MB memory capacity
- Processor: 1 GHz or faster (x86 or 64-bit)
- Please note: EndNote 20 can be installed on Windows 7, but will not work properly.

Mac OS

- Mac OS 10.14 and 10.15
- at least 2 GB RAM
- ca. 700 MB memory capacity
- Processor: Intel-based

For the installation, follow these steps:

1. Please close all running programs.
2. Click on the download link on our website <https://www.ub.tum.de/en/endnote>
3. Authenticate via eAccess with your TUM identifier. Here you can also find the license key.
4. Download the software. Enter the license key found on the previous website.

2.1 Installation for Windows and MAC OS

The link to the installation file is available on our EndNote page: <https://www.ub.tum.de/en/endnote>

Unzip the files and run them.

2.2. Patch Files & updates

You can find patch files with updated features via the command *EndNote program updates...* in the *Help* menu. This is where you can automatically search for patch files and install them.

New versions of EndNote cannot be installed via an update. To install a new version of EndNote, please uninstall your old EndNote version first and then install the new version. Remember to back up your data first!

2.2 Can I continue to use EndNote when I leave the TUM?

There is a clear answer to this question: No. Once you leave the TUM, you are required to either purchase a private license or uninstall the software. We recommend you export your EndNote **library**^{*1} as a txt, rtf, html, or xml file before so that you can continue using the data with a different software later.

¹ See the end of these lecture notes for explanations of words marked like this.

3 EndNote – start & first steps

To start EndNote, go to the *Start* menu and choose EndNote from the list of applications.

In some cases, you might have to agree to the license agreements of EndNote. Or EndNote might inform you about new updates. In that case, confirm the license agreements and install the update.

Once you have opened EndNote and want to create a new EndNote library, follow these steps:

1. Select the command New in the File menu.
2. In the window New reference library, select the desired storage location and assign a name to the EndNote library (database).
3. Click on Save.

File types and backups

For each EndNote library (.enl file), a folder with the same name (.data) is created, in which documents belonging to the library are stored. Files with the extension “.enlx” contain a compressed library that includes the data from the .enl file as well as the .data folder.

EndNote does not create automatic backups. Therefore, we recommend creating backups regularly. To do so, go to the *File* menu and choose *Compressed Library (.enlx) ...* .

The EndNote library contains all files belonging to the library: i.e., all bibliographic data, PDF file attachments (if selected), term lists, and groups.

The following files are not included: output styles, import filters, and connection files. These are part of the EndNote installation, not the library. The same goes for the settings in the preferences menu. They are not part of the compressed library.

EndNote is structured as follows:


The screenshot shows the EndNote web interface with several key areas highlighted by numbered callouts:

- 3**: Sync Configuration button in the top left.
- 4**: The left sidebar menu containing 'All References' (27), 'Recently Added' (0), 'Unfiled' (19), 'Trash' (0), 'MY GROUPS' (My Groups, htzsr), 'FIND FULL TEXT', 'GROUPS SHARED BY ...', and 'ONLINE SEARCH' (Library of Congress, LISTA, MIT, PubMed, Web of Science).
- 1**: The main 'All References' list with 27 entries. A table of references is shown below:

Author	Title	Year	Record N...	Last U...
	100 ways to lower your ...	2019	5	17.03...
Americ...	1001 tips for living well ...	2004	7	17.03...
Crosby...	1962 diabetes campaign	1962	10	17.03...
Dietel, ...	100 Jahre Frankenwaldb...	1985	14	17.03...
Edward...	Effect of Valvular Surger...	2016	24	17.03...
Fife, Br...	The coconut oil miracle	2013	12	17.03...
Frank ...	1,001 prescription drugs...	2000	2	17.03...
Hardy, ...	College students with co...	2018	18	17.03...
Larsen,...	Contacts to general prac...	2016	23	17.03...
Macdo...	Illness identity as an imp...	2016	22	17.03...

- 2**: The right-hand 'Preview and editing area' for the selected reference 'Crosby, 1962 #10'. It shows the 'Summary' and 'Edit' tabs, and a form for bibliographic information (Author, Year, Title, etc.).

1 Database section

In the database section, either all titles* in your library, in the currently marked group, or the results of a search will be displayed. With the  - symbol, you can add titles manually.

2 Preview and editing area

In this area, you can select the tab *Summary* or *Edit*. In the *Edit* tab, the bibliographic information about the currently selected title is shown and can be edited in this window.

The *Summary* tab displays the information on a marked title as it would appear in a reference list in Word and any PDF that you have added to the title. Here, you can also choose your current output style, which is EndNote's term for citation style. You can always choose a different citation style in your Word document later.

3 Synchronization via the Sync button

EndNote provides the option of synchronizing the data from your EndNote desktop library with the data from your EndNote Web account. Here you can start the syncing process.

4 Groups

Here you can create folders (called groups*) to sort your literature. There are also pre-given, non-permanent groups like *Recently added*, *Unfiled* and *Trash*. *Recently added* contains all recently added titles (by download or online search), but will be empty every time you close and reopen your library.

Unfiled contains all titles that are not part of any group. *Trash* contains all titles that were deleted in this session. This folder will also be empty after every closing and reopening of your library. *All References* contain all your library's references, no matter which group.

⑤ Find Full Text

Here you can see for which titles you are currently searching for full texts (PDFs) and for which you might have found some already.

⑥ Online search

To carry out an online search, select a database or library catalog.

4 Entering and editing a title in EndNote

To add reference data to EndNote, there are three possibilities:

1. You enter the title manually.
2. You work in a literature database or a library catalog and search for relevant literature. Afterward, export the list of results to EndNote.
3. You work in EndNote and search literature databases and library catalogs from here. Import the desired data into EndNote.

Below, all three possibilities are illustrated by examples.

4.1 Adding a title manually

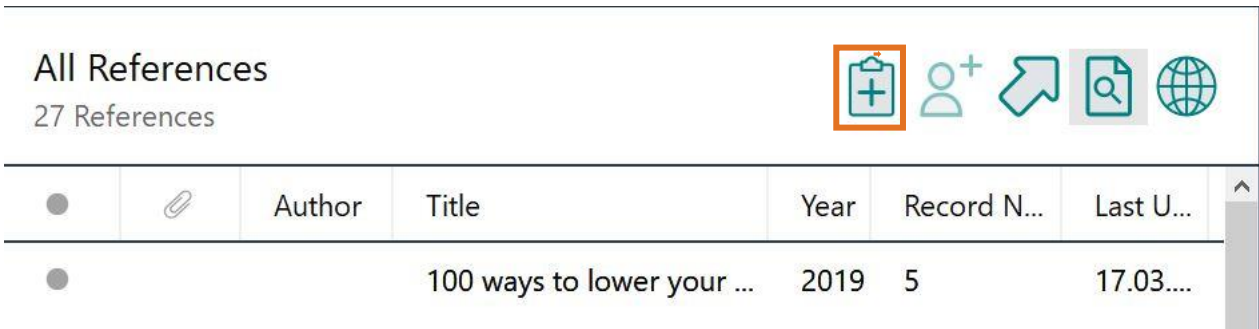


Figure 1: Adding a title manually

1. On top of all your current titles, click on the turquoise plus symbol (as seen above). Alternatively, in the references menu, select the command *New reference*. A new, blank dataset will be opened.
2. Choose the document type from the drop-down menu Reference type*, e.g. *Journal Article* or *Book Section*, etc. The input fields vary depending on which document type you select. By default, EndNote will automatically declare new titles as the reference type *Journal Article*.
3. Enter all relevant data into the respective fields.

Names of persons and institutions: Please enter names of persons this way: Family name, First name. It is sensible to enter the full first name if available as EndNote automatically abbreviates first names if the selected citation style demands that.

When entering institution names put in a comma at the end:

Example: *Technische Universität München,*

If an institution's name already contains a comma put two commas in that place:
Example: *University of California,, Berkeley*,

Pages: Just enter the numbers, no p./pp. for page/s or S. for Seite/n. If required by the citation style, EndNote will add these automatically.

More than one entry in a field: If you want to enter more than one author, keyword, etc. start every entry on a new line by pressing the *Enter* key.

When you close the window, the data will be saved. New author names, keywords, and journals that do not yet exist in the database are shown in red.

Why is the reference type important?

The reference type determines how a source is shown in the bibliography. If you select the wrong reference type, your source will be shown incorrectly in the bibliography. If you are not sure which reference type to use, try out different ones and check the *Summary* tab for how the reference will be shown in your reference list at the end of your document. You can look at it as a preview of your reference list.

4.2 Importing references from databases and online catalogs

To show how to import references from databases and online catalogs, we use the TUM Online Catalog and the database Scopus as examples.

Importing references from an online catalog

1. Carry out your search in the online catalog (OPAC) as usual.
2. Save interesting references in *Temporary List*.

The screenshot shows the TUM Online Catalog interface. At the top, there is a search bar with the text 'Search for: apfel' and a 'Search' button. Below the search bar, it says 'Your search request: Keyword Anywhere = apfel'. The results are displayed in a table with columns for 'OPAC (938)', 'OPACplus (25470)', and 'Result(s) OPAC (938)'. The first result is 'Messungen an Hochtemperatur-Brennstoffzellen mit kohlenmonoxidhaltigen Brenngasen' by Apfel, Holger. The second result is 'Die Subsidiaritätsklausel der Unterschlagung' by Apfel, Henner. The third result is 'Bildung und micellare Eigenschaften alkylsubstituierter Kronenether' by Apfel, Thomas. The fourth result is 'Heteronukleare Komplexe mit Bindungen zwischen Kupfer(I) und Mangan(-I) sowie Cadmium(II) und Eisen(-II)' by Apfel, Jens. The 'Save' button is highlighted with a red box, and an orange arrow points to it. Another orange arrow points to the 'Temporary list' dropdown menu. A third orange arrow points to the 'MY LIST' link in the top left corner.

Figure 2: Adding references to My List

3. To export your references, click on the tab *My List*. Select all references you wish to export (Figure 1).
4. Select *Save* on the right (Figure 2). Choose the format *EndNote* and *Full records*. Click on *Save*.
5. Depending on your browser settings, the export file will either be saved on your computer, opened with a predefined program or you will be asked how the file should be handled. Adjust your browser settings so that after downloading a file, you will be asked how to proceed or that all .ris files are automatically opened with EndNote.
6. You will find your imported results in the folder *Imported references*. They have not been assigned to any group yet.

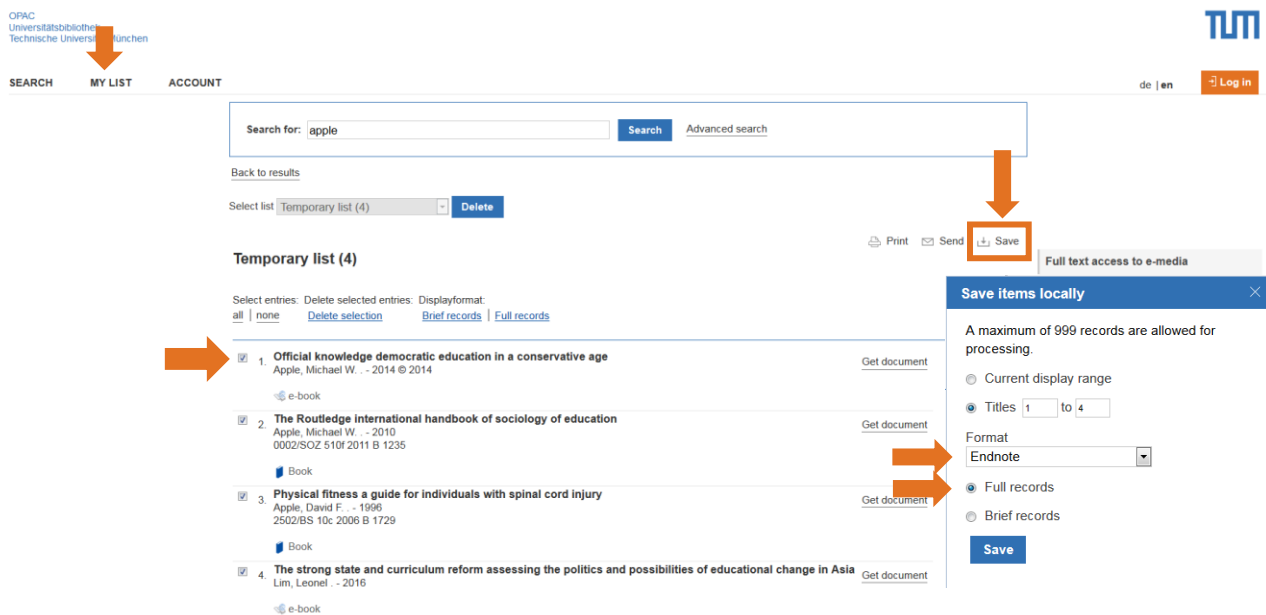


Figure 3: Exporting references from the TUM online catalog

Importing references from a database

Literature databases will usually offer you the possibility to export articles or literature sources. The exact procedure for this differs slightly from database to database. Below, the procedure is shown in the database Scopus, using the browser Mozilla Firefox. The steps shown here are similar for most other databases, however.

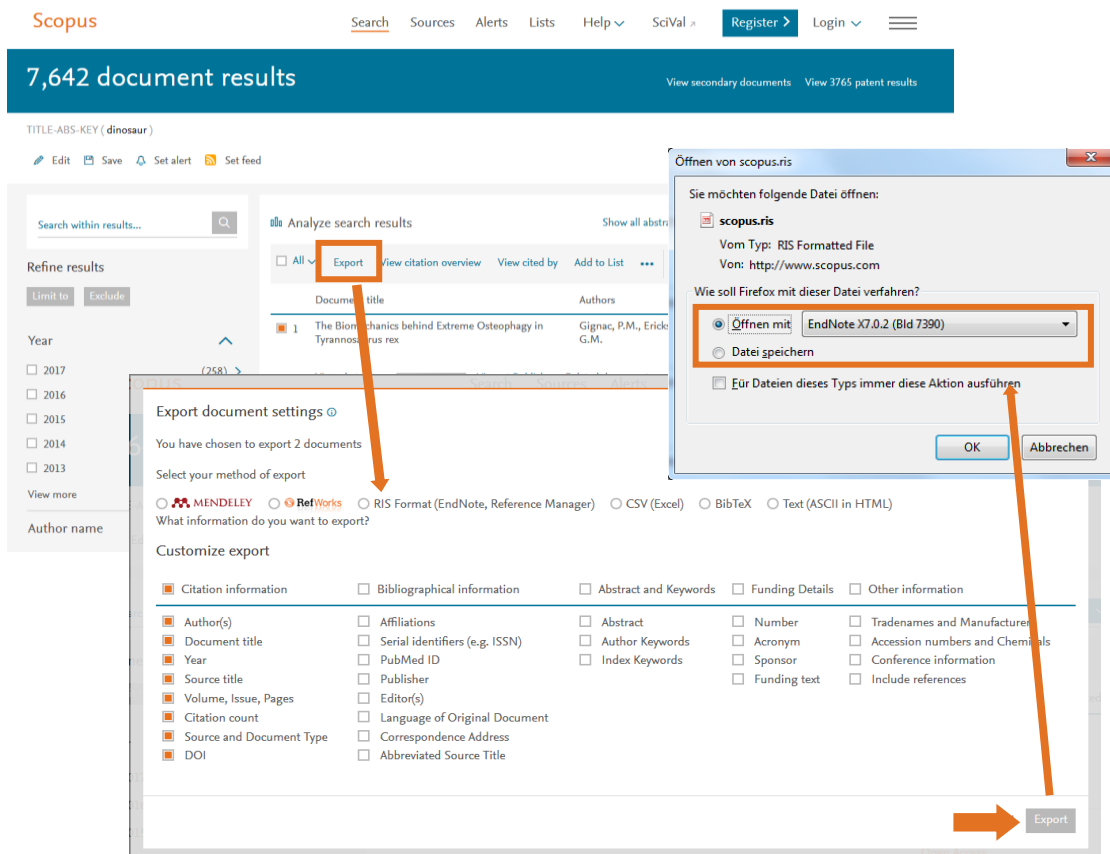


Figure 4: Export from the database Scopus

In the database:

1. Select the references you want to export. In some databases, export is only possible from the checklist (called MyList, MyFolder, or the like).
2. Select the export path and export format. You might be offered a direct export to EndNote. If not, choose the .ris format (Figure 6).
3. Start the export.
4. In the Windows memory window, which usually opens after this*, click on the option *Open with* (*Öffnen mit*). Select EndNote as the application in which the export file is to be opened (Figure 4). If EndNote does not appear in the list of applications, you need to scan your PC for it. If you did not choose a different location during the installation, you will find the needed file on your hard disk under the following path: C: → Programs → EndNote X20 → EndNote X20
5. You are then requested to select the library into which your titles are to be imported. For this, always open the respective .enl file.

* If this window does not open, go to your browser settings and define how to handle certain document types (here: .ris files).

You can find the freshly imported references in the folder *Imported References*. Check the information and decide whether you want to add the title to your library or delete it and which groups you want to assign these titles to.

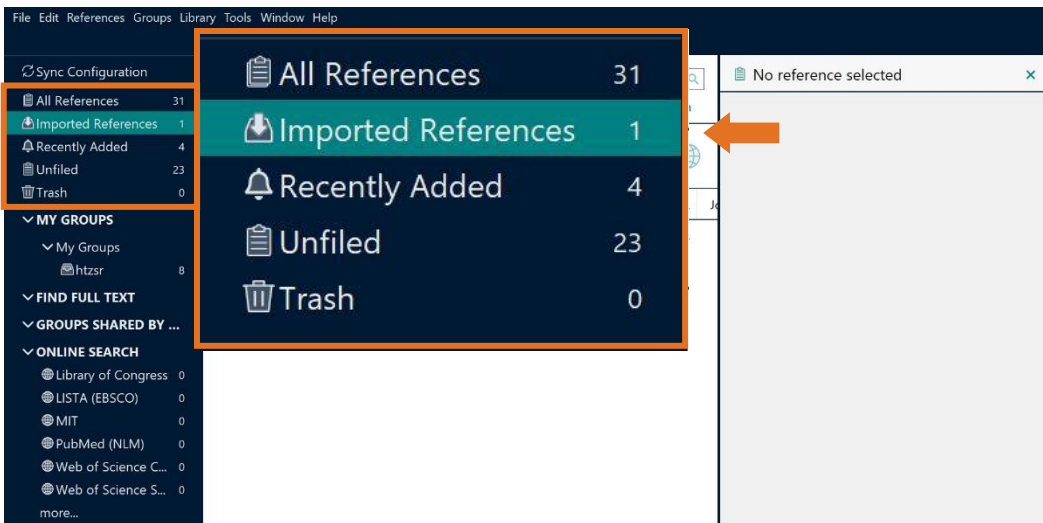


Figure 5: Imported title in EndNote

4.3 Online search in EndNote

With EndNote, you can scan numerous online databases, including PubMed and library catalogs, such as the Library of Congress.

1. Select the database or catalog in which you would like to search on the left underneath “*Online Search*”
2. If you only see one single search bar on the top, click on advanced search to see multiple search options.
3. Type in the search term and click on *Search*.
4. You will now only see the search results of your search rather than your already imported titles. To sort through the many results, click on the title to see a more detailed view. You can retrieve more than the standard 25 results by clicking on the numbers 50, 75, 100 etc.
5. Mark the titles you would like to import and click on the round plus symbol (see figure 6).

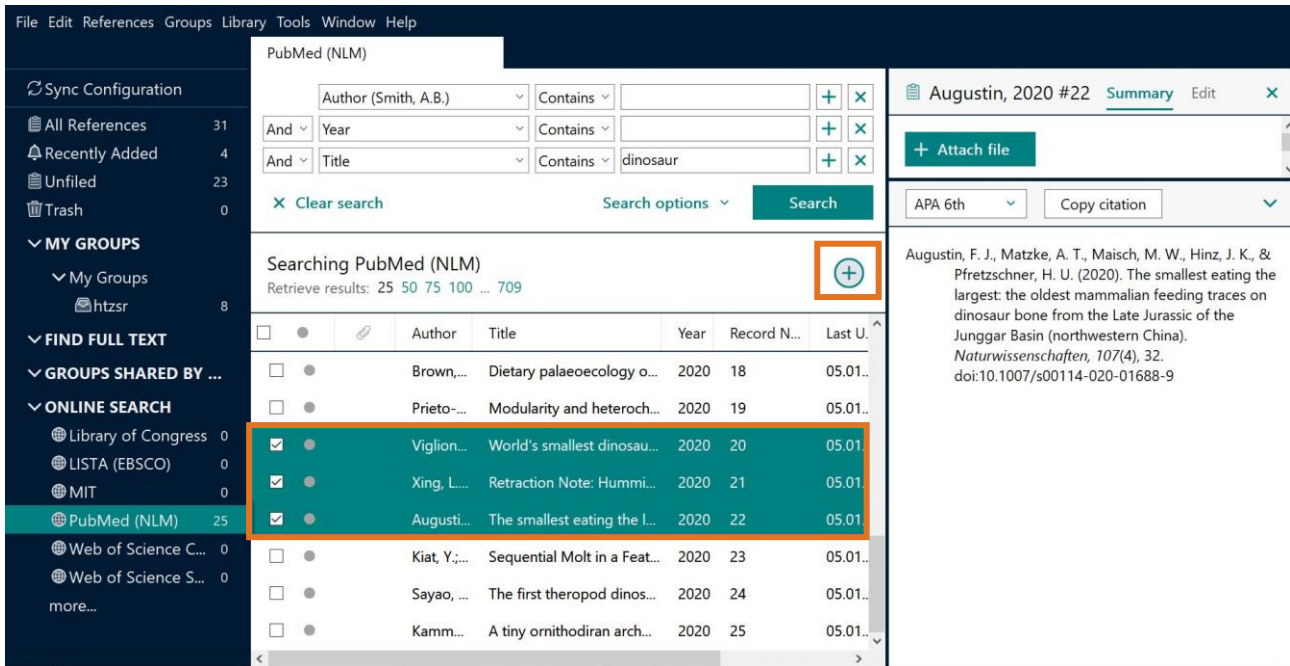


Figure 6: Copying your titles into your own library

And if I cannot open my exported references directly in EndNote?

If you cannot open the exported references directly in EndNote, save the export file to your computer first. Then open the file with EndNote (right-click on the file > *Open with* > *EndNote*)

ATTENTION:

Whenever you import data, check the acquired datasets. Only titles that have been imported into EndNote correctly, can be quoted correctly later on.

4.4 Full-text search

With the command *Find Full Text* in the *References* menu, EndNote will automatically search for free full texts on the Internet.

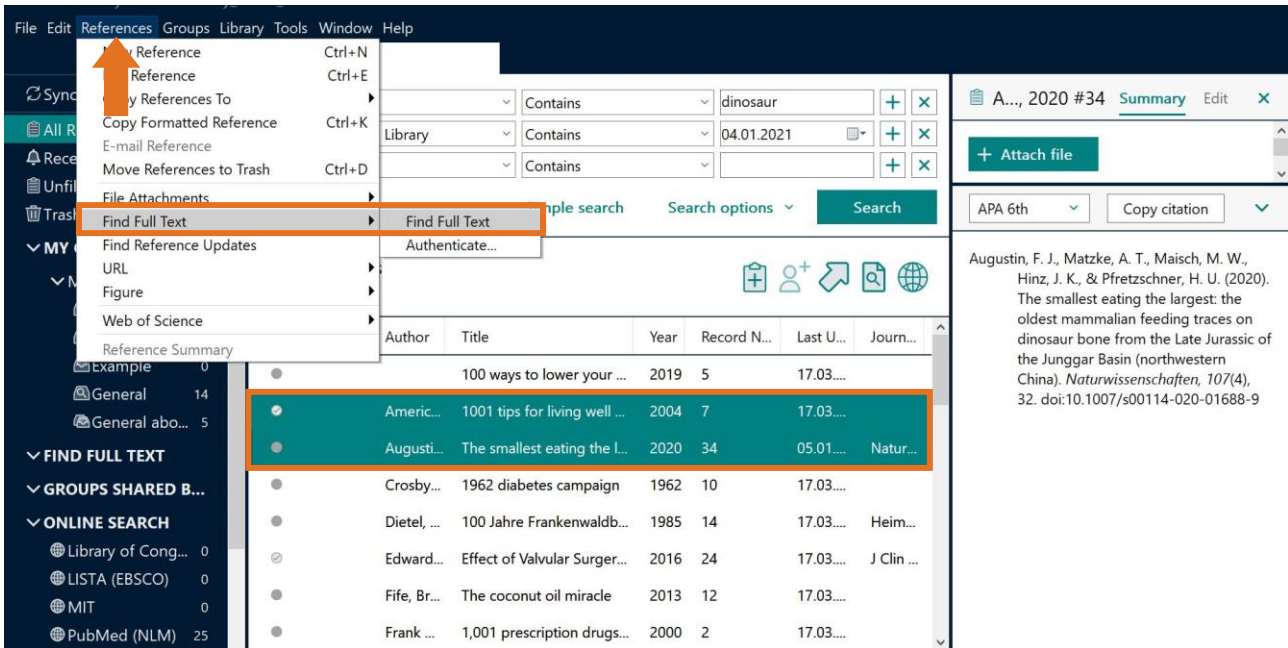


Figure 7: Full text search in EndNote

To always save a copy of the attached files in the EndNote library, select the menu *Edit*, then *Preferences*. Add a checkmark under the point *URLs and links* at *Copy file attachments to the default file attachment folder and create a relative link*. This way, you have the data at hand even when you move files and EndNote no longer finds a file in the original location.

To find full-text articles the TUM has subscribed to even when you are not logged into the campus network, first insert the following **OpenURL path** under *Edit > Preferences*: *> Find Full Text*: **http://sfx.bib-bvb.de/sfx_tum**. Then go to the *Edit* menu and choose *> Preferences > Find Full Text > Authenticate with*:

Here add the following URL: <https://eaccess.ub.tum.de/login>.

If you now use *Find full text*, you will be led to the eAccess login page of the TUM where you authenticate with your TUM email address and your password. Click on *Log in* and *Continue*.

Note that this is no guarantee to find all available full texts and that the search will take noticeably longer.

Please keep in mind, that downloading full texts in a bulk is prohibited by copyright law and may result in a total block of database access for all TUM members.

4.5 Search for duplicates

With the command *Find Duplicates* in the *Library* menu, you can scan your EndNote database for duplicates. The found duplicates are displayed side by side. With the button *Keep this record* you decide which dataset you keep; the other dataset will be deleted.

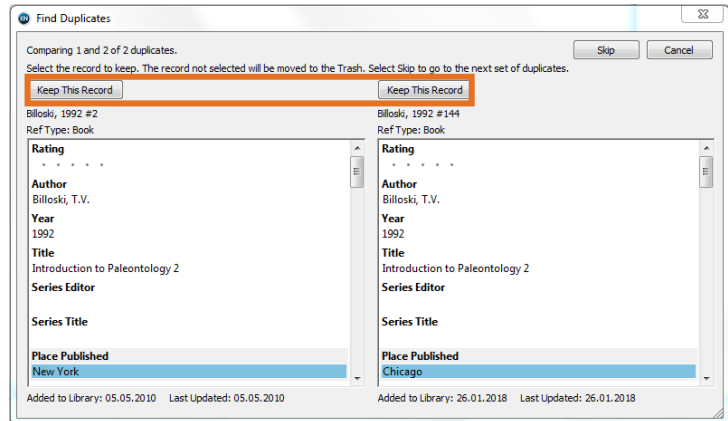


Figure 8: Deleting duplicates from EndNote

5 Searching references in EndNote

To search your own EndNote library for specific references, you can use the *Simple Search* for general searches or the *Advanced Search* for more specific ones.

5.1 Simple Search

The *Simple Search* searches all reference data including your PDF annotations and if it is machine readable the PDF itself. All entered search terms are connected with AND.

5.2 Advanced Search

Via *Advanced Search*, you can search several fields in your Library for a specific search term.

If it is not displayed already, open your *Advanced Search* via the combination of the keys Ctrl + F or use the button *Advanced Search* next to the *Simple Search*.

Here, you cannot only search for your references, authors, titles, or years but also your ratings, notes you added to a PDF and within the PDF itself (Figure 9).

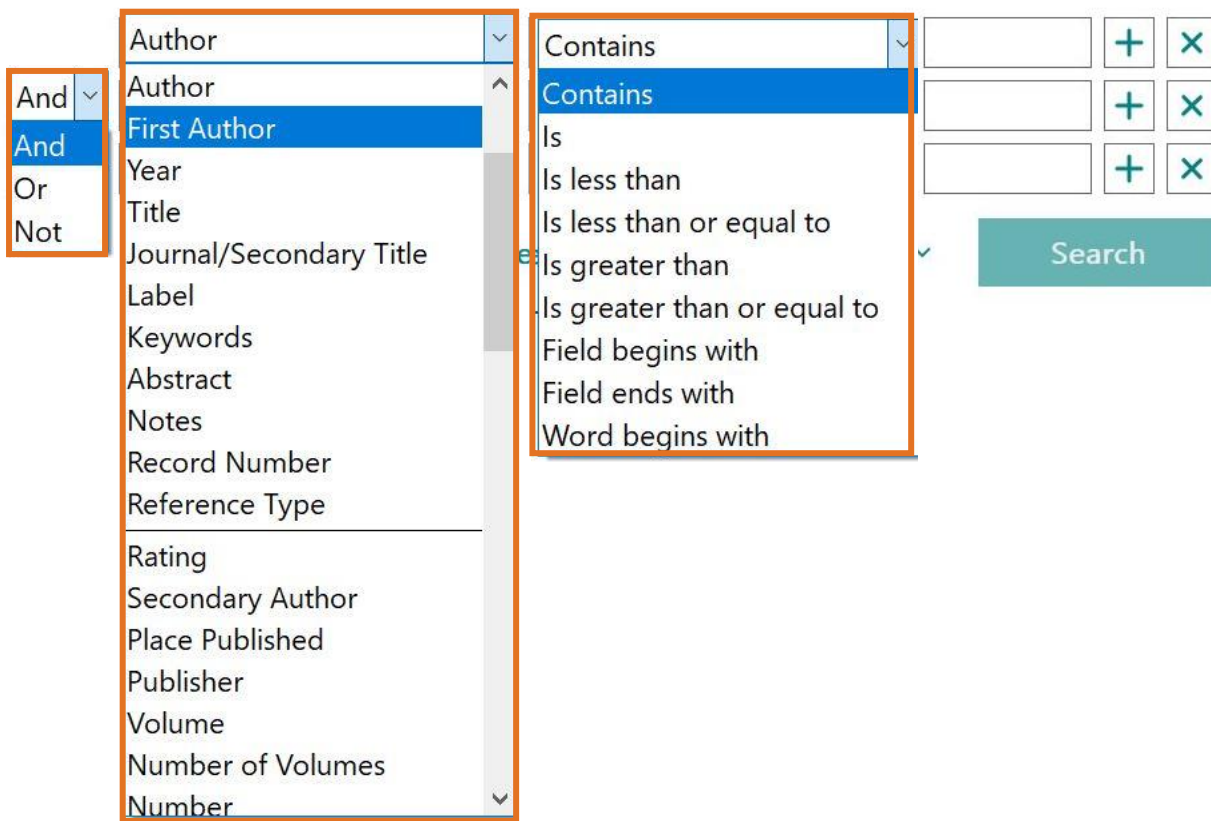


Figure 9: Advanced Search

6 Sorting titles in EndNote

EndNote enables the segmentation of data in the database into groups and distinguishes between *custom groups* (or just groups), *smart groups*, and *from groups*. You assign data sets to custom groups manually. The smart groups are based on a query that you prepare and are updated automatically. The from groups bring the titles of several custom and/or smart groups together. They are also updated automatically.

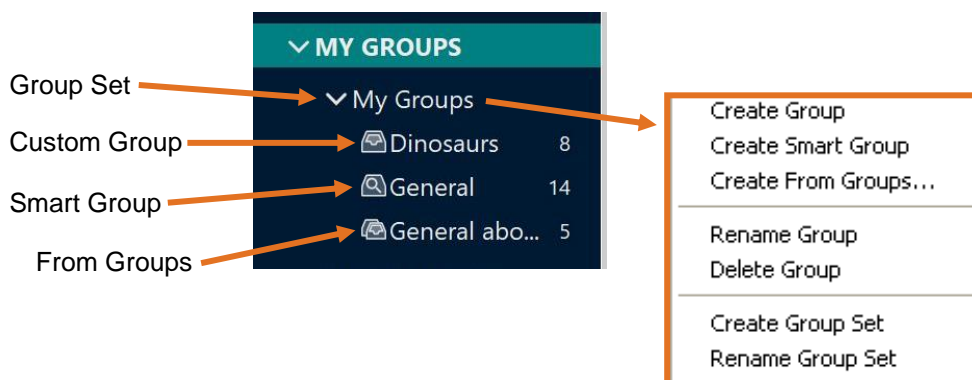


Figure 10: Custom, Smart and From Groups

6.1 Group sets

How to create a group set:

1. Select the command *Create Group Set* in the Groups menu.
2. Assign a name to the new group set.

6.2 Custom groups

How to create a custom group:

1. Right-click on the group set in which the custom group is to be created.
2. Select the command *Create Group* from the opened context menu.
3. Assign a name to the new custom group.

How to insert data into a custom group:

1. Mark the datasets in the overview.
2. Drag and drop the data into the desired group.

6.3 Smart groups

How to create a smart group:

1. Right-click on the group set in which the smart group is to be created.
2. Select the command *Create Smart Group* from the opened context menu.
3. Assign a name to the new smart group.
4. Enter your search strategy for the smart group in the opened search mask and click on the button *Create*.

6.4 From Groups

How to create a from group:

1. Right-click on the group set in which the from group is to be created.
2. Select the command *Create From Groups...* from the opened context menu.
3. Assign a name to the new from Group.
4. Specify from which custom and/or smart groups you want to merge titles in your new from group.

ATTENTION

A dataset can belong to several groups but is still saved only once in the database. If a dataset is removed from the custom group, it is not completely deleted from the EndNote library, but only from the custom group.

If you delete a title from a smart group or a from group, on the other hand, it will be entirely deleted from the database/library without warning!

7 Citing with the Word add-in CWYW (Cite While You Write)

With EndNote you can easily create and edit reference lists and cite references in the text at any time. **CWYW*** is also available for Open Office Writer (for Windows) and Apple Pages.

While working on a paper, you can easily switch between author-year citation styles and numeric citation styles. To insert quotations into a Word document, proceed as follows:

1. Start Microsoft Word.
2. In Word, open the EndNote X20 commands in the Tools menu and select *Insert Citation*.
3. Enter one or more search terms in the opening search window and click on *Find*. All references from open EndNote libraries that meet your search criteria will be displayed.
4. Mark the reference(s) you want to insert into the text and click on the button *Insert*.
5. EndNote inserts the reference(s) into your document and creates the corresponding entry in the bibliography in the selected **output style***.

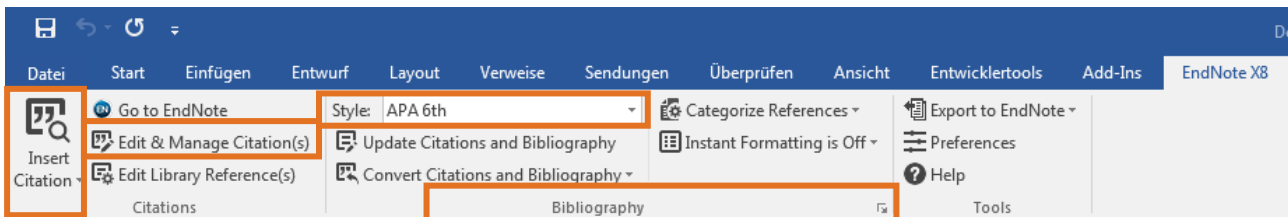


Figure 11: EndNote Toolbar in Word 2010

If you would like to use a footnote style, you have to decide to use it before you start inserting *any* citations. After deciding on a footnote style, you may only switch between different footnote styles. It is not possible to switch between e.g. an author-year style and a footnote style.

To insert footnotes into a Word document, proceed as follows:

1. Choose a footnote citation style in the EndNote menu (*Style*). A footnote style is e.g. the Chicago Style.
2. Now move your cursor to the position in your text where you want to insert a footnote. Using the *Word menu*, insert an empty footnote (*References > Insert Citations*).
3. Move your cursor to this footnote and open the EndNote X20 commands in the Tools menu.
4. Select *Insert Citation* and enter one or more search terms in the opening search window. Click on *Find*. All references from open EndNote libraries that meet your search criteria will be displayed.
5. EndNote inserts the reference(s) into your footnote and creates the corresponding entry in the bibliography in the selected footnote style.

Adding page numbers

Additional information, such as page numbers of the cited source, is added with the button *Edit & Manage Citation(s)*.

8 Formatting bibliographies – changing output styles

Once you include the first reference in your text via EndNote, EndNote automatically creates a bibliography at the end of the document that is updated regularly.

To change the citation style, open the *Style* drop-down menu. A short list of frequently used citation styles will be displayed. To see the full list of citation styles installed on your computer, choose *Select another style* from the *Style's* drop-down menu.

Via the *Bibliography* button (Mac: *Bibliography Settings*) you can adjust the layout and heading of your reference list.

9 Creating text-independent bibliographies

To create a bibliography independent of a text, follow these steps:

1. Select the folders or references in EndNote that are to appear in your bibliography.
2. Go to the item *Subject bibliography...* in the *Tools* menu.
3. Choose according to which criteria your bibliography is to be created (sorted by author, title, year of publication, keyword, ...).
4. A list of all authors will open (if you have chosen the author as a criterion), specifying how many titles there are for this person.
5. Select all the authors who are to appear on your list, and click on *OK* once more.
6. You will now receive a list of all publications, grouped by authors.
7. Select the desired output style.
8. With the button *Layout*, you can make further adjustments (e.g. the sorting).
9. Have the bibliography displayed to you as a print preview or directly print or save the list.

Print bibliographies

To quickly create a bibliography,

1. Mark all the titles that are to appear on it.
2. Select the desired output style.
3. Go to *Print preview* in the *File* menu or copy the selected references to a text file by choosing *Copy formatted* from the *References* menu.

10 Miscellaneous

To save your data, you should regularly create backup copies. There are two options to do this: Either you save your data in the form of a compressed library in the .enx format or you export the library in .txt, .rtf, .htm, or .xml format. Both options can be found in the *File* menu.

Connection files, import filter & output styles

You can further customize your EndNote installation according to your needs. Information can be found here:

Connections Files*

You can download connection files to other catalogs and databases from the EndNote website: <http://www.endnote.com/support/enconnections.asp>

Import Filter*

You will find downloads for additional import filters on the EndNote website, too: <http://www.endnote.com/support/enfilters.asp>

Updates

You can find EndNote updates at: <http://endnote.com/downloads/available-updates>
Please note that you first have to uninstall EndNote before installing a new version.

Output styles

More output styles can be found at: <http://www.endnote.com/support/enstyles.asp>

11 Contact and support

For questions about EndNote, you can get help and support in various ways:

Manual

In EndNote you can find the EndNote manual in the Help menu.

EndNote Web Help

In EndNote Web, you will also find a similar help function.

Technical support

You will be given technical support at: <https://support.clarivate.com/s/>

Video tutorials

You will find help and video tutorials in our e-course at: <https://www.moocle.tum.de/course/view.php?id=33004>

Help at TUM

You are also very welcome to approach the university library with anything about Endnote: literaturverwaltung@ub.tum.de.

Reference management and citation drop-in session

In addition to our EndNote courses, we offer reference management consultations online. For further information, please visit our website at:

<https://www.ub.tum.de/en/webinar/904>

TUM Citations Guide

The TUM citations guide will help you with questions on how to cite: https://media-tum.ub.tum.de/1225458?show_id=1236069

Glossary

Connection file	These files enable research in several databases and library catalogs from within EndNote, by creating the necessary connection between software and database.
CWYW	Stands for <i>Cite While You Write</i> and refers to a plug-in to directly access the individual EndNote library from a text software, to quote from it.
Groups	Describes folders in which titles can be stored, organizing them based on a topic. There are three different group types: custom groups (or just groups), smart groups, and from groups.
Import filter	These files enable the input of EndNote title data in different formats, from different databases and catalogs into EndNote.
Library	An EndNote library is a collection of references on a specific subject, such as the subject of a diploma, bachelor or master's thesis (equivalent to the terms "file" or "database" in other software).
Output Style	An instruction on how literature sources are to be cited. Output styles are created by academics or publishers and contain detailed instructions on the formatting and the required information for a citation. They may also be called citation styles. Examples: APA 7 th , Chicago footnotes
Reference type (document type)	Reference type is the expression for the external form of an information source, for example, compilation, newspaper article, or audiobook. Document types are known in another context as "publication types" or "publication forms". EndNote offers input forms for the different document types to capture all relevant information and to be able to cite sources in the bibliography correctly.

Contact

Technical University Munich

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