Lecture Notes for the Course

Reference Management with Endnote

– Advanced Course –

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We appreciate your feedback.

This script is updated regularly. Nevertheless, if you find out that the information is no longer up-to-date or you have suggestions for improvement, we look forward to receiving an e-mail at work-shop@ub.tum.de.

The current version of this script can always be found under the following link: https://media-tum.ub.tum.de/1342402

1 Content of the EndNote Introductory Course

The EndNote Introductory Course covers the following topics which are required for the EndNote Advanced Course:

- Importing titles into EndNote (manual entry, import from the TUM online catalog, import from a database, importing references to EndNote via the online search function)
- Basic knowledge of how to organize references into groups in EndNote and how to find references in one's own library via the search function in EndNote
- Working with the Word add-in (inserting references into Word and formatting reference lists in a chosen citation style)

The current lecture notes for the EndNote introductory course can be found here:
https://mediatum.ub.tum.de/node?id=1100719

2 Handling PDFs in EndNote

In EndNote, you can read and annotate PDFs. You can add comments to a PDF that you can later search for using the search function in EndNote. You can also change the filenames of downloaded PDFs to descriptive names. In addition, EndNote provides a feature to search the web for freely available full texts or to import PDFs already stored on your computer into EndNote.

2.1 Annotating PDFs

In the summary tab of the preview and edit area, you can see if your reference is linked with a PDF file. Use the button *Open* in the drop-down menu to open the PDF file in a new window. Here you can add comments and highlights to your PDF (Fig. 1).

Click on the comment symbol (1) to open the bar with the editing functions (2). Highlighted text passages, underlined text, crossed out text (*Strikeout Text*), and comments (*Sticky Note*) that you make in End-Note's PDF Reader will also be displayed when you open the document in Adobe Acrobat Reader. If

Figure 1: PDF Viewer in EndNote

you make further changes via Acrobat Reader, make sure to replace the existing linked file when saving. Otherwise, a copy of the file is created which is not linked to the dataset in EndNote.

In the advanced search in EndNote, the search categories *Any Field*, *Any Field + PDF* notes, PDF, and *PDF-Notes* provide both the possibility to search for your own comments and to search the

PDF's full text. This only applies to PDF documents that are machine-readable. Scanned texts that have not been edited with OCR recognition cannot be searched.

2.2 Importing PDF Folders

In EndNote, you can import an entire folder including subfolders containing PDFs. From the menu choose *File → Import → Folder*. The *Import Folder* dialog box will open (Fig. 2). In the field *Import Folder,* select the desired folder from your computer. In the *Duplicates* field, select how duplicates should be handled.

You also have the option of including subfolders and then have a Group Set created for this folder. If your selected folder contains subfolders, these are taken over as Custom Groups.

After importing - if you have selected this option - the imported folder will be displayed as a Group Set in the navigation of your local library. Otherwise, the PDFs will appear in the *Imported References* folder.
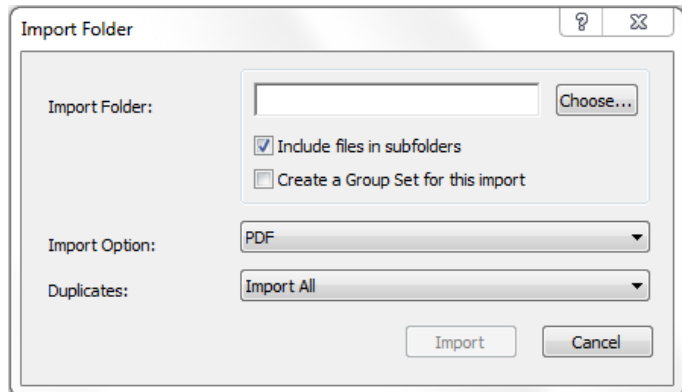
Figure 2: Dialog box for the PDF import

You may notice that EndNote does not import the correct title data for all PDFs when importing.

EndNote first searches the PDF for a DOI and researches the corresponding title data on the Internet. However, if the PDF does not contain a DOI or is a scanned PDF and not machine-readable, EndNote uses the document's metadata. In many cases, only the name of the file is available here (see Fig. 3).

Figure 3: List of imported PDF titles

In this case, subsequent editing of the data is required. If you know the DOI of the article, enter it into the corresponding field and select the function *Find Reference Updates* in the *References* menu. If no DOI is known, manually enter the author, title and year into the corresponding fields and select the function *Find Reference Updates*.
For all datasets, check if the retrieved information is correct - even for those which EndNote added automatically.

2.3 Auto Import Folder

In addition to manually importing PDFs or folders of PDFs, you can also specify a folder from which new PDFs are to be automatically imported into EndNote; i.e. each time you open EndNote, the program checks to see if new PDFs have been added to the selected folder and then automatically imports them.

To set this up, go to *Preferences* in the *Edit* menu and then to the item *PDF Handling*. There you can specify a folder in the section *PDF Auto Import Folder*, from which PDFs are automatically imported (Fig. 4).

If there are subfolders in the selected folder, the PDFs (unlike a normal import) cannot be imported from these subfolders.
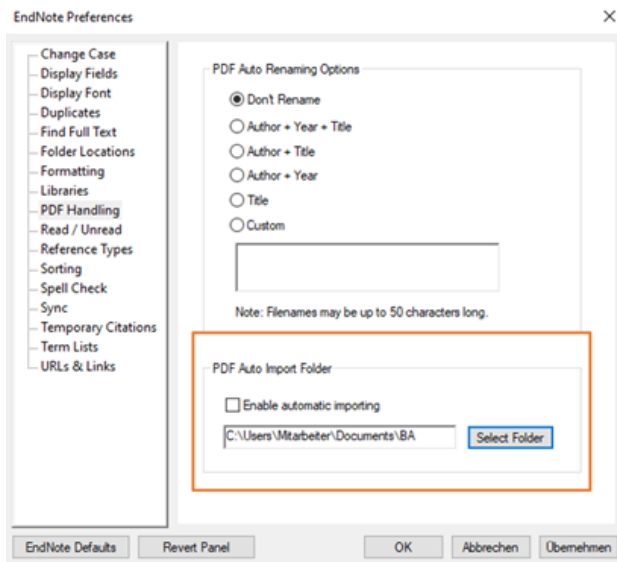
Figure 4: Setting up Auto Import Folder

2.4 Renaming PDF Attachments

Often, PDF documents that you download from databases have cryptic, not very descriptive names. EndNote allows you to rename them according to a scheme you specify.

It could be, for instance, the scheme *Author - Year - Title*. You can set this up in the menu *Edit → Preferences → PDF Handling → PDF Auto Renaming Options* (Fig. 5).
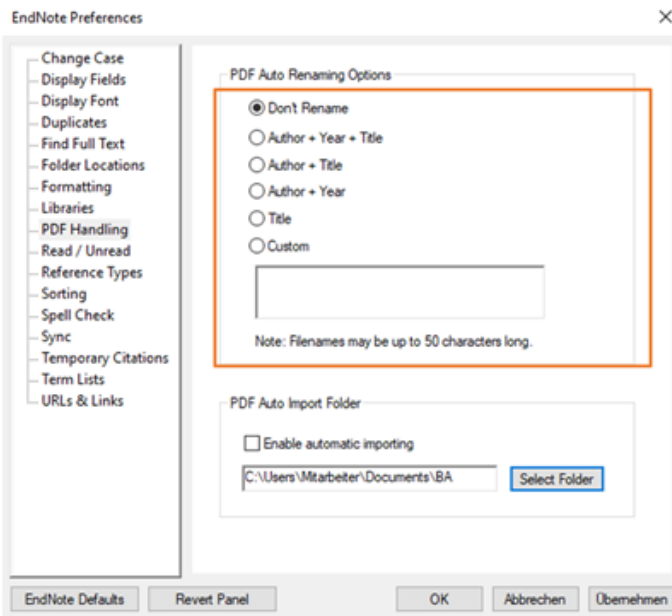
Figure 5: Renaming PDF attachments

2.5 Find Full Texts

With the command *Find Full Text* in the *References* menu, EndNote automatically searches for freely available full texts. This function can also be found in the context menu (right-click, Fig. 6).

Select all references which are to be included in the full-text search. EndNote can search for a maximum of 150 titles.
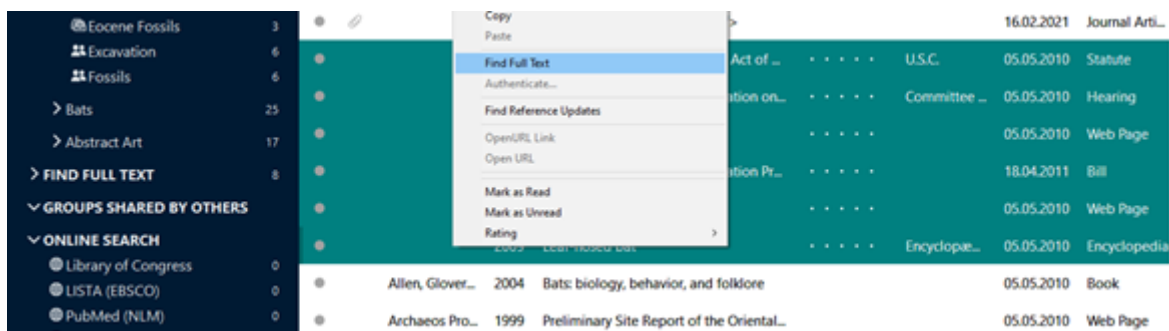
Figure 6: Starting the Find Full Text search

In order to always save a copy of the file in the EndNote Library, choose *Preferences* from the *Edit* menu. Under the item *URLs and Links*, check the box *Copy new file attachments to the default file attachment folder and create a relative link*. Now, even if you move the original files to where End-Note would not find them, you still have the data at hand.

To avoid having to re-run the Find Full Text search every time you add new references to your library, you can automate this. Select *Edit → Preferences → Find Full Text* and check the box *Automatically invoke Find Full Text on newly imported references* (see Fig. 7).

In order to be able to use the function *Find Full Text* to retrieve full texts licensed by TUM, go to the item *OpenURL Path* in the menu *Edit → Preferences → Find Full Text* and enter this URL: http://sfx.bib-bvb.de/sfx_tum (Fig. 7).
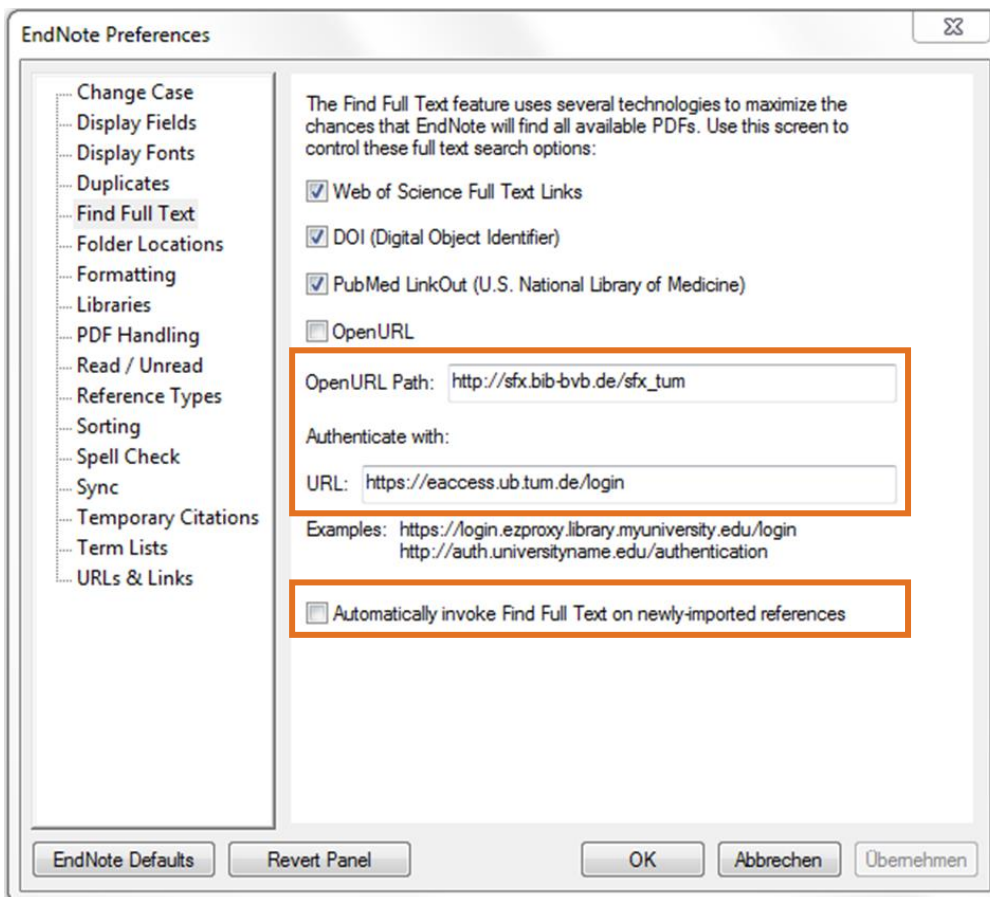
Figure 7: Enter the OpenURL Path

If you are not logged into the campus network or use a VPN client, add the URL https://eaccess.ub.tum.de/login under the heading *Authenticate with*. This allows you to search outside the campus network for full texts licensed by TUM.

In this case, when you call up the *Find Full Text* function, you will first be directed to the TUM's eAccess Log-in page. Here, authenticate yourself with your TUM ID (TUM e-mail address + password), click on *Log-in* and then *Continue*.

Note that you will not be able to find all the licensed electronic full texts available at the TUM. If the *Find Full Text* search does not yield any results, it makes sense to do an additional search in the licensed databases at TUM (access via DBIS). If you search for licensed full texts, you may also experience longer search times.

If you want to cancel the full-text search, click on the status *Searching* under the item *Find Full Text* in the navigation (Fig 8). Pause or cancel the search.

Full texts in EndNote Web / Online
Full texts can either be saved directly in End-Note Web or added and synchronized with other devices via the synchronization feature.

While you can share your references via EndNote Web with other EndNote Web users, this is not possible for full texts up to and including version X7.1. Only version X7.2 offers this option.
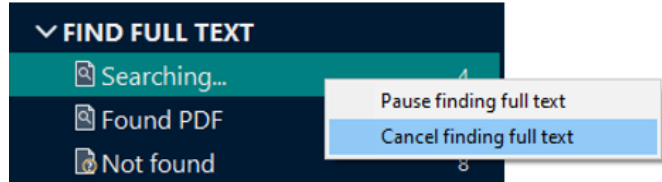
Figure 8: Pausing or cancelling full-text search

3 Organizing and Finding References in EndNote

What options do you have for sorting your references in EndNote?

Decide what information you want to see displayed in which order in the content window. Arrange your references in Custom, Combo and Smart Groups. Rate your references and keep track of how much of it you have already read and have yet to read.

Use keywords to find titles on a topic quickly, and keep your data consistent using term lists and search for duplicates.

3.1 Displayed Columns

By left-clicking on one of the column headers (*Author*, *Title*, etc.), your entries are sorted alphabetically or by size. The order of the columns can easily be changed by drag and drop (Fig. 9).

Figure 9: Sorting and moving columns

By right-clicking on a column header, you choose which information should or should not be displayed (Fig. 10).

3.2 Rating & Read/Unread Status

In the *Rating* field, you rate your references using a 5-star system. You can also specifically search for references with a certain rating. In addition, you can use your rating as a criterion for a new Smart Group.

To keep track of which reference you have already read and which you have not, EndNote offers the Read/Unread category. Unread references have a small gray dot in the Read/Unread category, ones already read are displayed with a small dot with a tick.
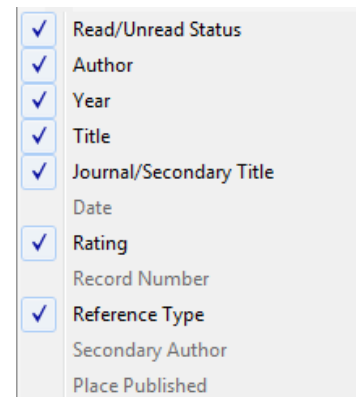
Figure 10: Displayed Columns

3.3 Groups

EndNote makes it possible to subdivide the data into groups and differentiates between Custom Groups, Smart Groups and Combined Groups (see Fig. 11). You manually assign datasets to Custom Groups. The Smart Groups are based on a search query you have created and are updated automatically. The Combined Groups (From Groups) combine the titles of several Custom and Smart Groups. They, too, are updated automatically. Content-related groups can be bundled into Group Sets. Group Sets are headlines that bundle several groups, they themselves contain no references.
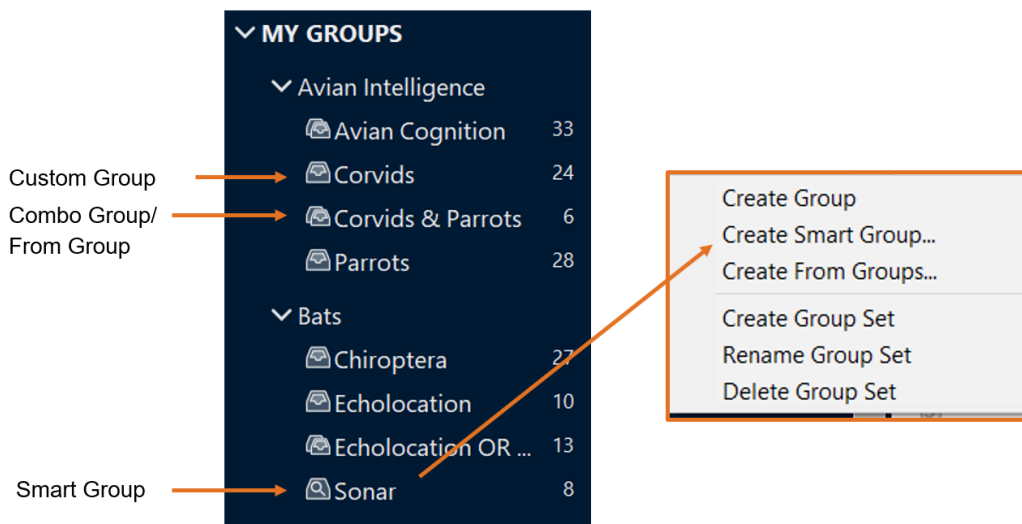
Figure 11: The different Groups in EndNote

3.3.1 Group Sets

To create a Group Set:

1. From the *Groups* menu, select the command *Create Group Set*.
2. Assign a name to the new Group Set.

3.3.2 Custom Groups

To create a Custom Group:

1. Right-click on the Group Set in which you want to create the Custom Group.
2. Open the context menu and select *Create Group*.
3. Assign a name to the new Custom Group.

To include data into a Custom Group:

1. Select the datasets in the overview.
2. Drag and drop the datasets into the desired group or select the desired datasets, then go to *Add References To* in the context menu and select the desired Custom Group.

3.3.3 Smart Groups

To create a Smart Group:

1. Right-click on the Group Set in which the Smart Group is to be created.
2. Open the context menu and select the command *Create Smart Group*.
3. Assign a name to the new Smart Group.
4. In the opened search mask, enter your search strategy for the Smart Group and click the *Create* button. Here you can combine any criteria; including Keywords, Rating, Year, etc.

3.3.4 Combined Groups

To create a Combined Group:

1. Right-click on the Group Set in which you want to create the Combined Group.
2. Open the context menu and select the command *Create From Groups*.
3. Assign a name to the new Combined Group.
4. Indicate from which Custom and/or Smart Groups you want to combine titles in your new Combined Group.
5. If you want to change the search query for the Smart Group again, click on the Smart Group and select *Edit Group* in the context menu.

CAUTION
A dataset can belong to several groups, but it is still saved only once in the database. If a dataset is removed from the Custom Group, it will not be entirely deleted from the EndNote Library but only from the Custom Group.

On the other hand, if you delete a title from a Smart Group or a Combined Group, it will be entirely deleted from the library without any prior warning! Until you close EndNote, you will find the deleted records in the *Trash* folder.

How do I know which groups a reference is assigned to?
Select the respective reference and choose *Reference Summary* from the context menu. All groups assigned to this reference are displayed. There is no distinction between Custom and Smart Groups.

3.4 Keywords

In order to have your literature on a certain topic quickly at hand, it makes sense to assign descriptive terms - so-called Keywords. You can search EndNote for these Keywords, so you find your references even if the topic is named differently in the title or does not appear in the title at all. You can use them as criteria for Smart Groups and create corresponding bibliographies.

You can assign multiple keywords to a dataset. Enter the keywords in the *Keyword* field, each one in a new line. EndNote collects all keywords in a *Term List*. With the Term List, you always have a good overview of which keywords you have already used.

The Term List can be opened with the key combination *Ctrl + 1* if the cursor is in the keyword field, or via the menu *Library → Open Term Lists → Keywords Term List*.

3.5 Term Lists

EndNote automatically maintains lists for the fields Author, Journal and Keyword. In other words, every item entered in this field is saved in the corresponding list. This serves to standardize terms. For instance, it is quite common that an author whose works are imported from different databases is named differently. Sometimes the first name is written out in full, other times only the initials are given. With the Term Lists you ensure that an author from whom you quote several works is always named the same way in your reference list.

Term Lists are created automatically with the first entry (in the program you will recognize a new entry by the red font color). You can also create them yourself or import ready-made Term Lists from EndNote. Especially in the case of journals' term lists, it is worth importing ready-made lists from EndNote, as different versions of abbreviations for individual journal titles are stored here (Fig. 12). EndNote supplies lists for various areas of studies, they are stored in the folder *Terms Lists*.
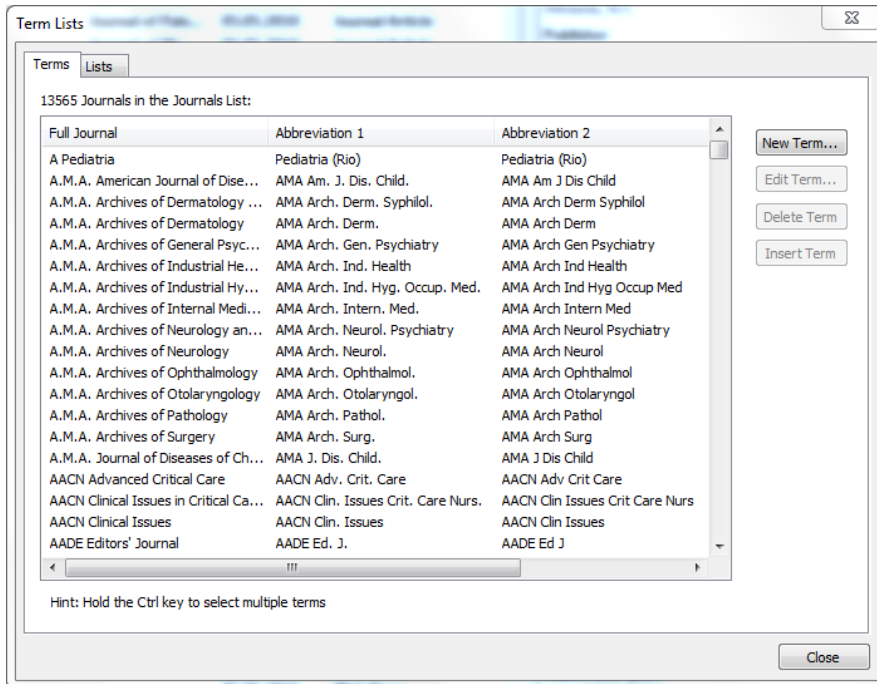
Figure 12: Journals Term List in EndNote

Via the menu *Library → Open Term Lists*, the individual Term Lists can be opened. The tab *Terms* shows you all terms contained in the Term List. In the tab *Lists,* you can switch between the lists and import or export your Term Lists.

For journals: If you have already collected journals in your EndNote Library, first delete all titles in the *Terms* tab. Then import the desired lists in the *Lists* tab and complete the imported list with your existing terms via the *Update List* button.

3.6 How Does EndNote Deal with Duplicates?

In the EndNote Preferences, you specify whether and how EndNote checks your library for duplicates. To do this, go to the menu *Edit → Preferences → Duplicates*. Decide which fields should be considered in the duplicate check and how to deal with found duplicates.

From now on, EndNote will check the imported references for existing entries in the open library.

Datasets which are added to the library via direct import are not checked. If you wish to check all datasets in your library for duplicates, select the command *Find Duplicates* in the *References* menu.

3.7 Finding Retracted Articles

From version 20.2 onwards, EndNote offers the function "Retractions". Every time EndNote is opened or closed it will automatically check whether articles have been retracted. EndNote checks journal articles by their DOI or PubMed ID. In addition, the EndNote Library must be connected to an online account (for more see Chapter 7). If you have deactivated automatic synchronization, this does not stop EndNote from searching for retracted articles. The articles are checked against

the Retraction Watch Database. Only if the articles are listed there as retracted will EndNote recognize that they have been retracted.

The retracted articles are displayed in the navigation in the "Retractions" folder (see Fig. 13.). If you select a reference, a warning note "Retracted publication" highlighted in gray is displayed in the summary tab on the right. Clicking on this warning note displays further information as to why the article was retracted.
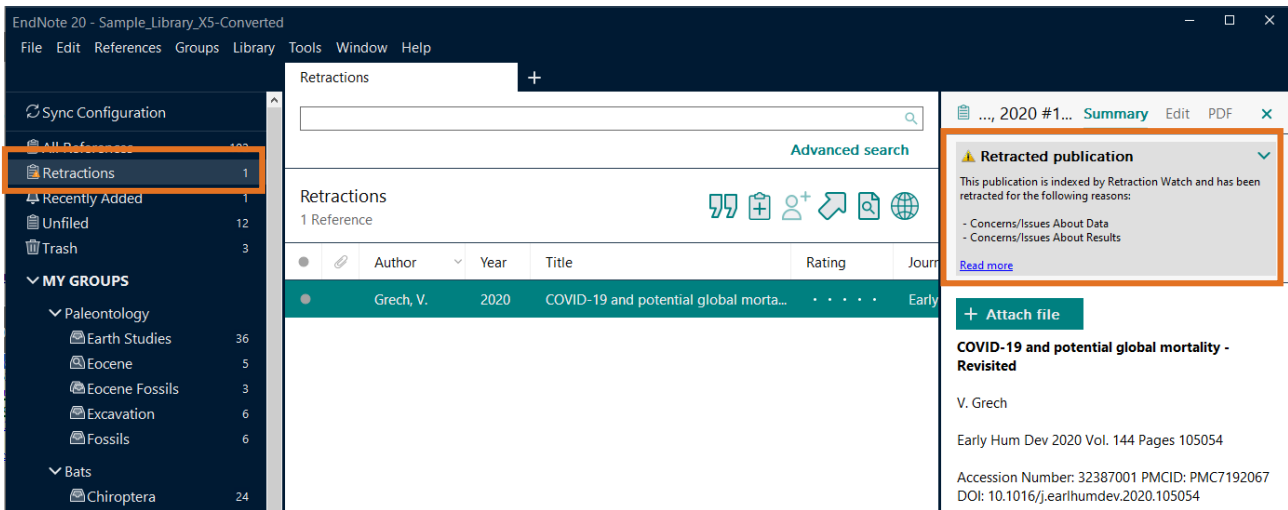

Figure 13: Retraced Articles in EndNote

3.8 Searching within EndNote

In EndNote, you have two options to search within your references, the simple search and the advanced search.

3.8.1 Simple search & Advanced search

The *Simple search* is shown above the content area. The *Advanced search* can be opened via the *Advanced search* button (Fig. 14), via the *Library* menu or via the shortcut Ctrl + F.

Figure 14: Search options in EndNote

The *Simple search* searches all fields in the library, including PDF full text and PDF comments. The term you are looking for is highlighted in color in the hit list. Enter one or more terms and press the *Enter* key. If you enter several terms, they are connected with AND. This search is useful for fast, general searches.

The *Advanced search* performs special searches. There are multiple search boxes that you can use to search through specific fields, such as Author, Title, Keyword, etc. These search boxes can be combined with AND, OR, or NOT. Via the drop-down menu in the field *Contains* you can determine more exactly how the entered term shall appear in the searched field. (Fig. 15)   You can add more search boxes via the + button to the right of the search slot. Again, a search in the entire library including full texts and PDF comments is possible.
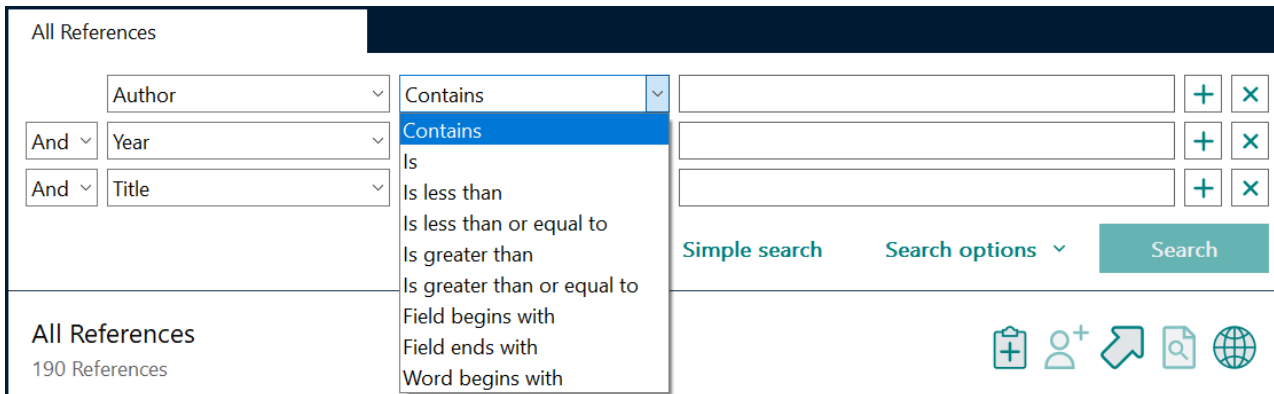

Figure 15: Search fields in EndNote

3.8.2 Saving Searches or Converting Them into Smart Groups

You can save these searches via the *Search options* button or convert them into a *Smart Group*.

3.8.3 Searching Multiple EndNote Libraries

When you conduct searches within EndNote, only the currently opened library is searched.

The only way to perform a search across multiple EndNote libraries is through the *Insert Citations* feature in Word. If you have installed the EndNote plug-in for Word CWYW (Cite while you write), use this feature to search for sources as you write. This feature searches across all opened End-Note libraries on your computer. The status bar of the search window shows the EndNote Library in which the title you are looking for is stored (Fig. 16).
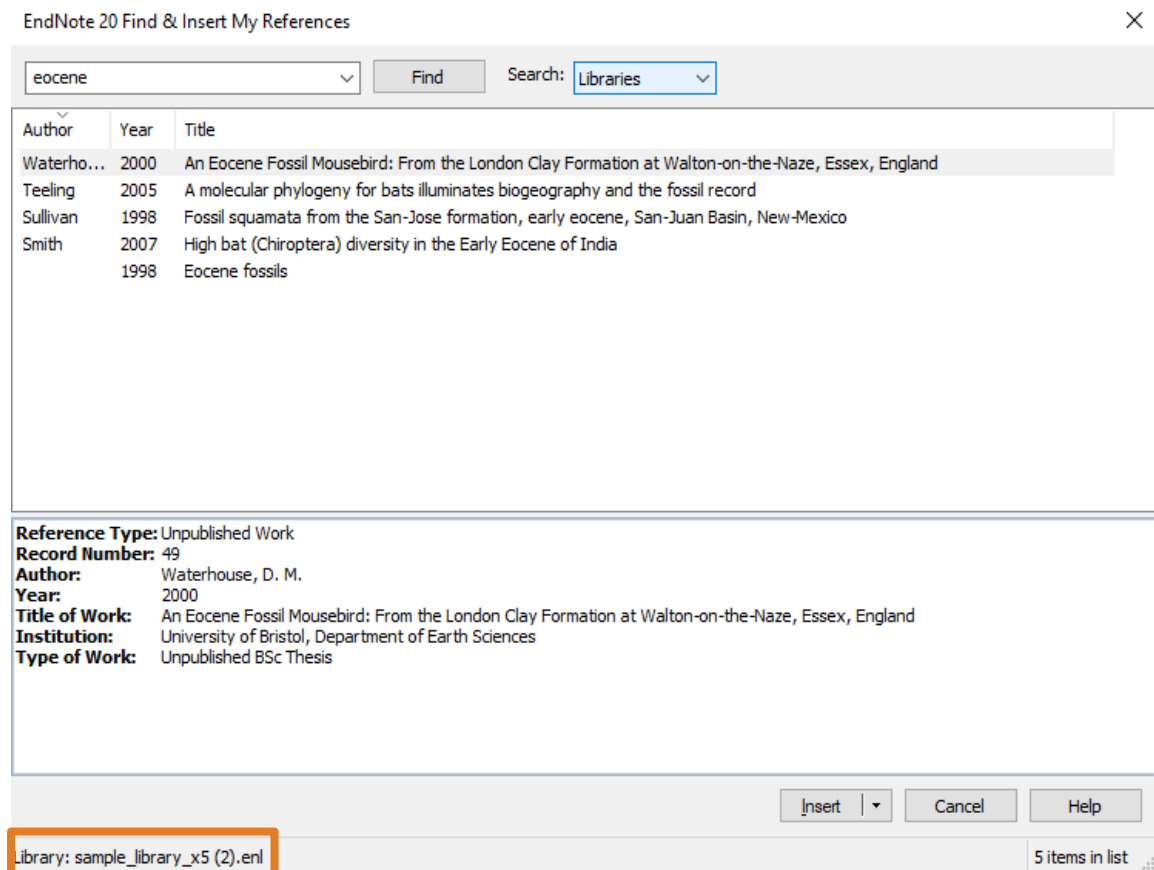
Figure 16: Searching across libraries via the Insert Citation feature in Word

4 Citing with EndNote's Word Add-In CWYW (Cite While You Write)

With the EndNote Word add-in, reference information can be quickly and easily inserted into the text. When entering the first reference into your text, EndNote automatically creates the reference list. As you work on your text, it will be constantly updated and supplemented in the chosen citation style.

4.1 Inserting Citations

1. Start Microsoft Word and open a new document.
2. In Word, open the EndNote commands in the *EndNote 20* menu.
3. Place your cursor where you want to insert a citation in the text and select *Insert Citation* (Fig. 17).
4. Enter one or more search terms (e.g. the author, a keyword, or a term from the title of the source you want to cite) in the opening search window and click the *Find* button. All references that meet your search criteria will be displayed. This feature searches in all opened EndNote libraries. This is the only way to search for your references across libraries. If you want to display all the references you have saved in your EndNote Library, insert a * in the search field.
5. Select the reference(s) you wish to insert in the text and click the *Insert* button.

6. EndNote inserts the reference(s) in your document and creates the corresponding entry in the reference list in the selected style (Output Style). CWYW is also available for the Open Office Writer in Windows, as well as for Apple Pages.
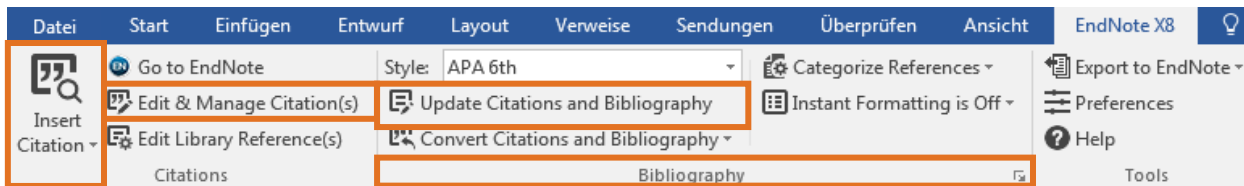

Figure 17: EndNote Menu in Word

4.2 Adding Footnotes

If you want to use a footnote style, first set a footnote using the Word feature *Insert footnote* in the *References* menu. Select your reference, as described in Section 4.1., 2-6.

4.3 Adding Page References

The button *Edit & Manage Citation(s)* adds additional information such as pages for the cited source. If you were to include this information by hand in the reference within the text, EndNote would overwrite your additions during the next update of the document, as the in-text reference is a field function that is automatically matched to the EndNote Library.

4.4 Formatting Reference Lists - Changing Citation Styles

As soon as you insert the first reference into your text via the EndNote Word add-in, EndNote automatically creates a reference list at the end of the text document that is constantly updated.

Use the *Style* drop-down menu to select the desired citation style. Here you can see the most commonly used citation styles. With the button *Select another style* you can choose from all citation styles installed in EndNote. In addition to the citation styles installed in EndNote, there are many more styles to add via the EndNote website.

To add a new citation style, save the new style in the *Styles* folder *(on Windows: C:\Program Files (x86)\EndNote 20\Styles)*.

Use the button *Bibliography* (also *Configure Bibliography* or *Bibliography Settings*) to determine the layout and heading of the reference list.

4.5 Grouping Reference Lists

Reference lists are usually sorted alphabetically or in the order of appearance. Sometimes, however, it is useful to display some of the sources separately from the others - e.g. internet sources separately from the rest of the cited literature or separated into primary and secondary literature.

To do this, you can use the *Categorize References* function in the Word add-In (see Fig. 18). Create the required categories using *Configure Categories*.
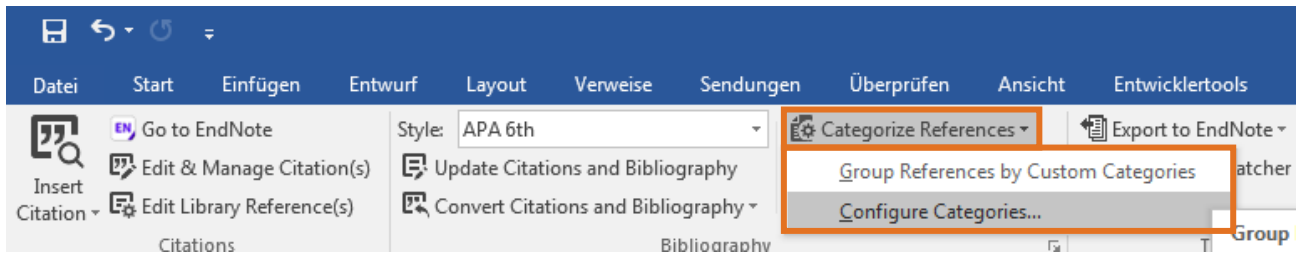

Figure 18: Creating Categories in Word

The categories (Category Headings) *Primary Sources* and *Secondary Sources* are already added. Use *+Category Headings* to create new categories (see Fig. 19). Drag and drop the references from the *All References in Bibliography* into the desired category. An automatic assignment e.g. via Custom or Smart Groups is not possible.
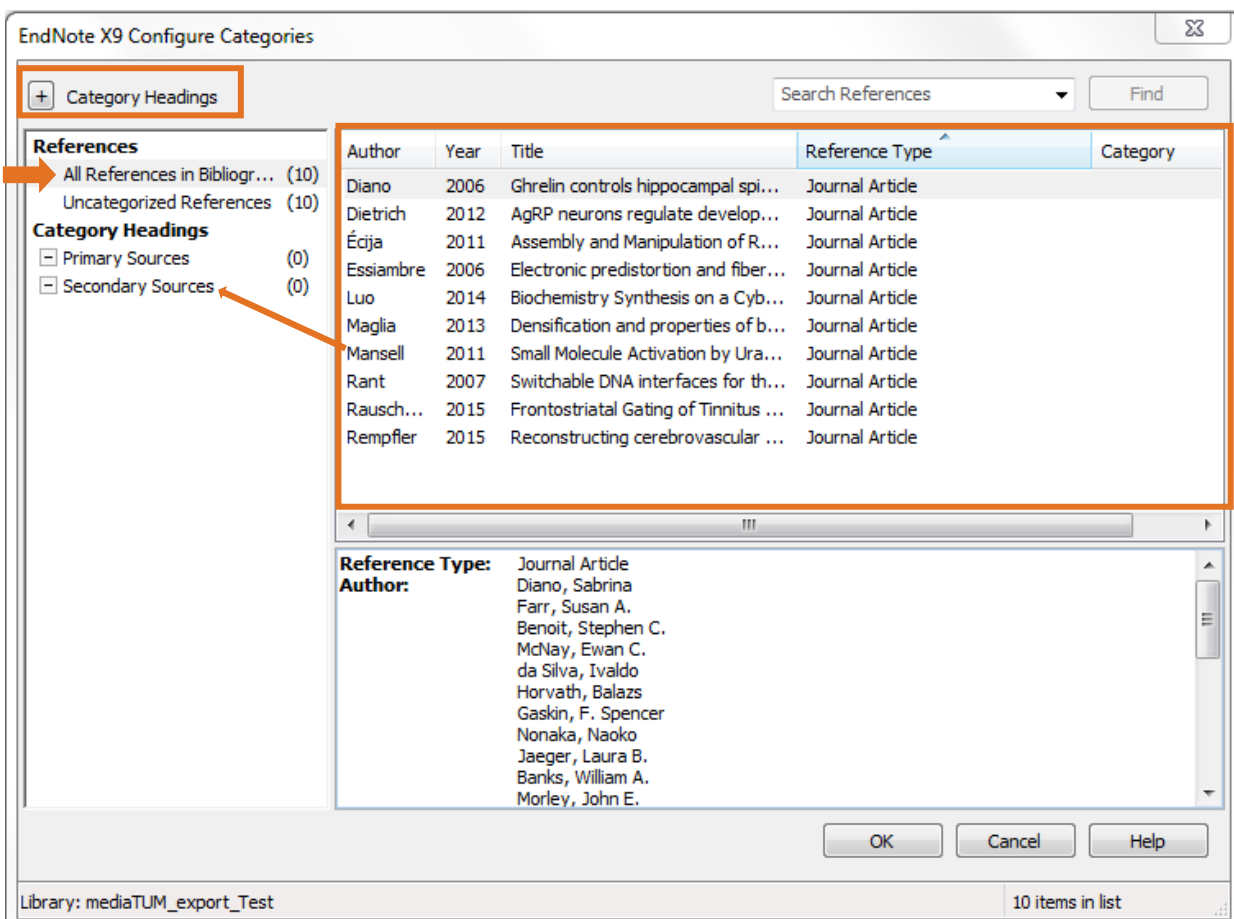

Figure 19: Creating new categories and assigning literature

4.6   Changing EndNote Style Sheets in Word

While the content of the reference list is determined by the citation style, the formatting is mostly defined by the style sheets. Once you have inserted the first source into your text using EndNote's Word add-in, you will find two additional style sheets in Word (see Fig. 20); the sheet *EndNote Bibliography* for entries in the reference list and *EndNote Bibliography Title* for the title of the reference list.

You can use the small drop-down menu next to the name of the sheet to change this style sheet (see Fig. 20).
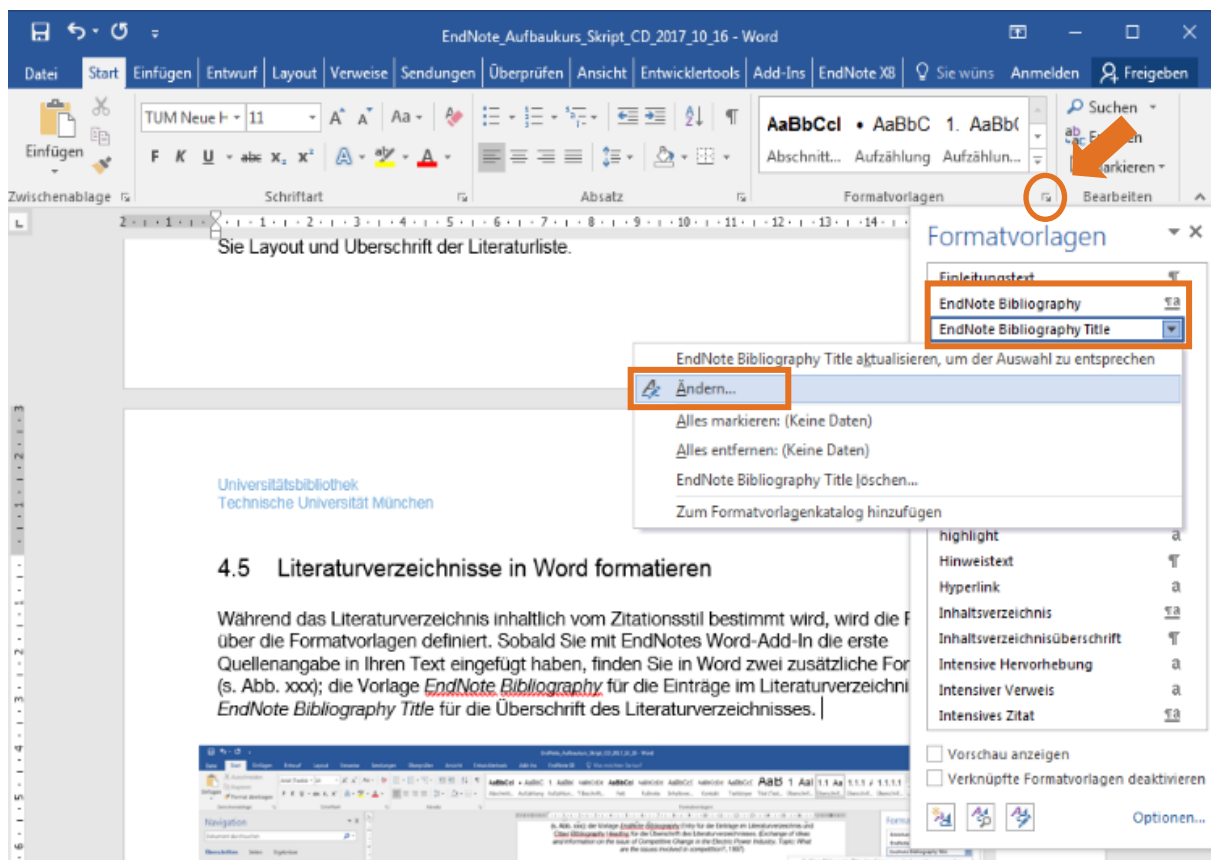

Figure 20: EndNote style sheets in Word

The style sheet lets you adjust the font and font size, line spacing, as well as the spacing between individual entries in the reference list (see Fig. 21).
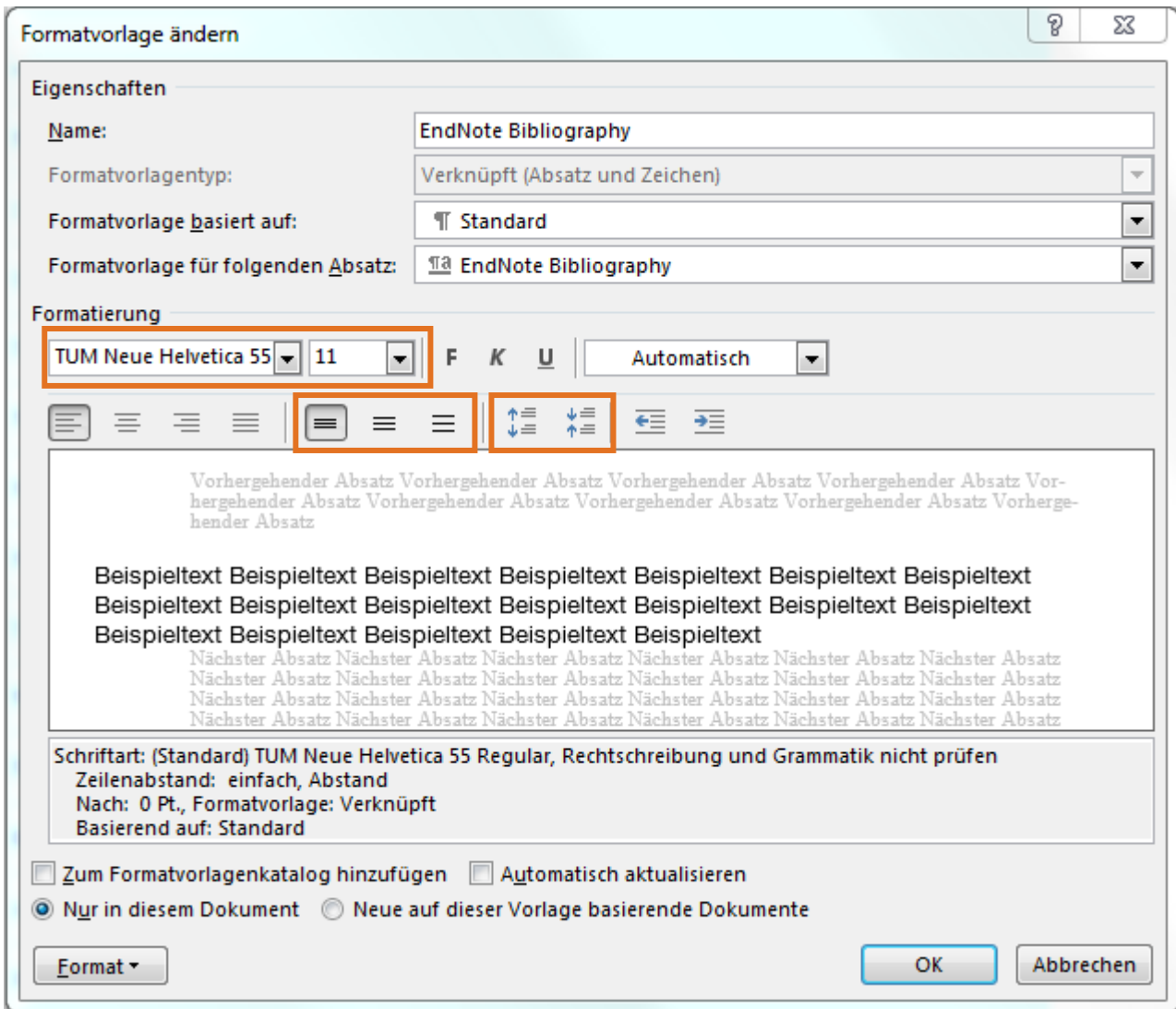
Figure 21: Adjusting style sheets in Word

4.7 The Travelling Library

A Travelling Library is created as soon as the first source is inserted into a text document with End-Note. The Travelling Library contains the bibliographic data of all sources cited in this Word document, with the exception of the fields *Notes*, *Abstract*, and *Research Notes*.

A Travelling Library can be exported to EndNote by other EndNote users from the Word document. If these datasets are then changed in EndNote, the changes are also displayed in Word. The prerequisite for all updates in Word is always that the EndNote Library used is opened. Otherwise, the data stored in the Travelling Library will be used for updating.

When importing a Travelling Library, the datasets are checked for duplicates.

4.8 Showing Cited References in EndNote?

EndNote creates a temporary folder with the name of the Word file (Fig. 22). This can only be seen as long as the Word document is open and contains all sources cited up to this point.

4.9 Faster Speed in Word – Instant Formatting

If you notice that it takes particularly long for Word to insert new references, temporarily disable the *Instant Formatting* feature while working on the document. In the EndNote menu in Word, select the button *Instant Formatting is On* and disable instant formatting. Additional settings for instant formatting can be made in the EndNote Preferences in Word under *Preferences*

Figure 22: List of cited references

> Tab *General*. In order to format citations and reference list at a later time, enable this feature again.

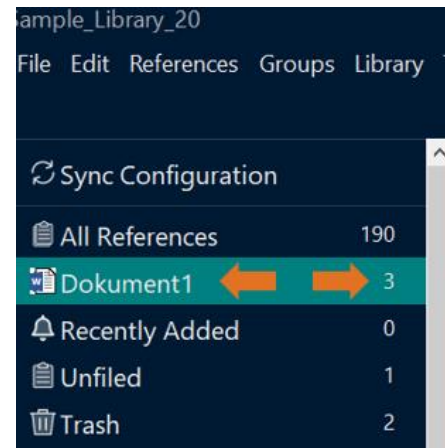# 5 Creating Bibliographies by Keywords, Authors or Years

To create bibliographies by different criteria such as keyword, author or year, select *Tools → Subject Bibliography* in the menu.

In the *Subject Fields* dialog box, select the criterion or criteria by which the list should be sorted.

If you wish to obtain a list sorted by author, it is possible to have each author displayed individually (*List each author separately, see Fig. 23*). This means that works by more than one author are listed under each author name and thus multiple times in the list. Then click on *OK*.
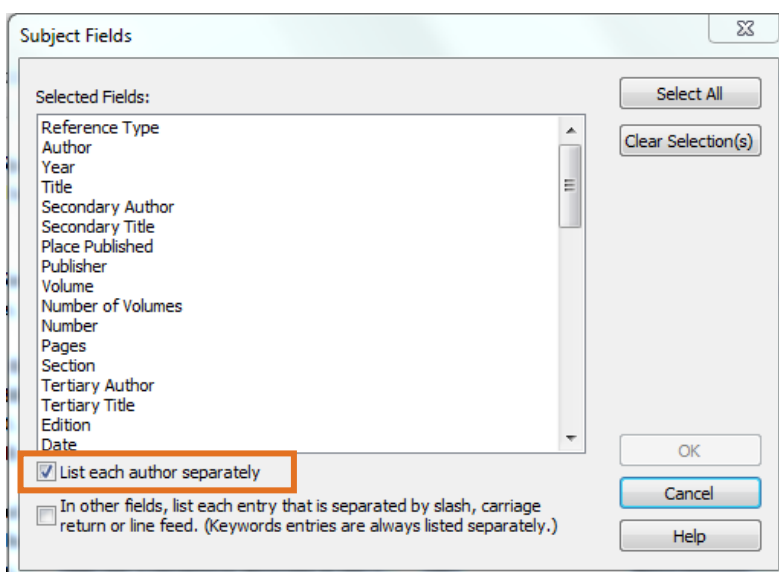
Figure 23: Creating reference lists by keywords, authors or years

In the following dialog window, all entries based on the criterion are listed and the respective amount of found references are displayed.

If you, for instance, choose a list to be sorted by keywords, all keywords are listed here with the corresponding number of titles (Fig. 24).

Choose *Select All* if you want a complete list, or mark all the terms you wish to include by clicking on them. Then click on *OK*.
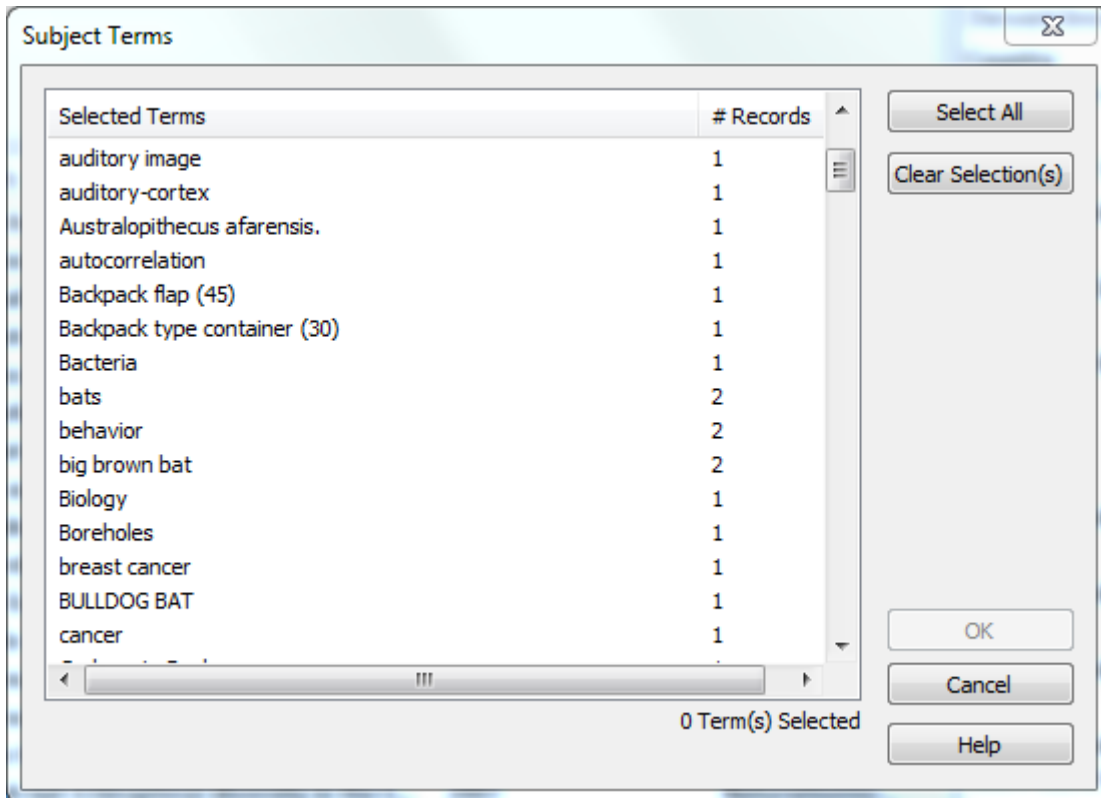

Figure 24: Selecting keywords for reference lists

Your bibliography will be created and displayed in a preview window (Fig 25).
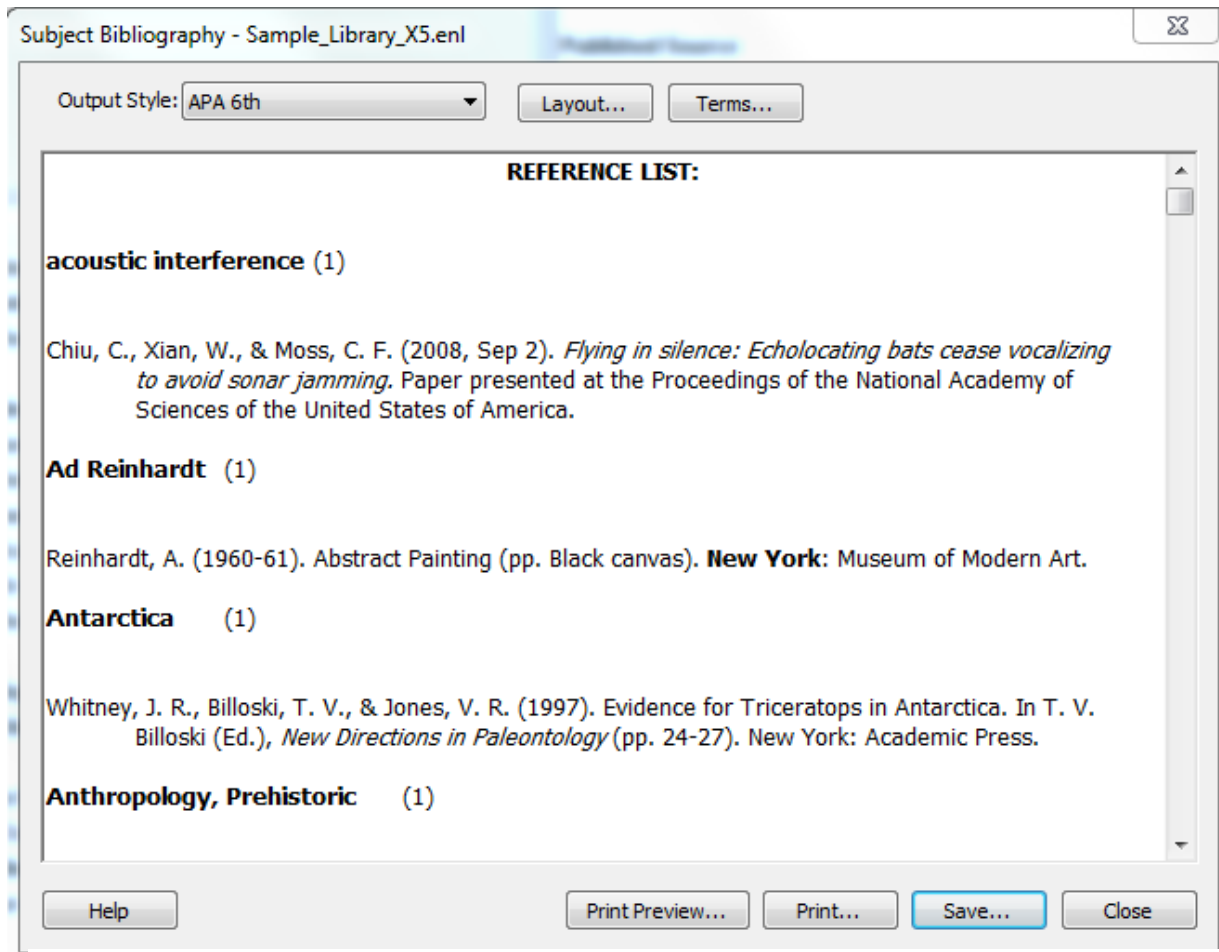
Figure 25: Preview for the reference list by keywords

For each keyword, a number in parentheses will show you how many corresponding titles there are in your library. Then corresponding references are listed. You can make a few changes to the layout using the *Layout* button. In the drop-down menu *Output Style*, you choose the citation style in which the list should be displayed. Or you can once again hide or show additional keywords using the *Terms*... button.

Decide if you want to print or save the list.

6 Changing and Creating Citation Styles

EndNote offers a variety of different citation styles (Output Styles). These can be found in EndNote via the menu *Tools → Output Styles → Open Style Manager*. There you will find a selection of all available styles offered by EndNote. More styles can be found at: http://endnote.com/downloads/styles.

In the Style Manager, you will find a preview window, below which the selected citation style is displayed (Fig. 26, 1). You might have to change the view to preview using the button *Style Info / Preview* (2).
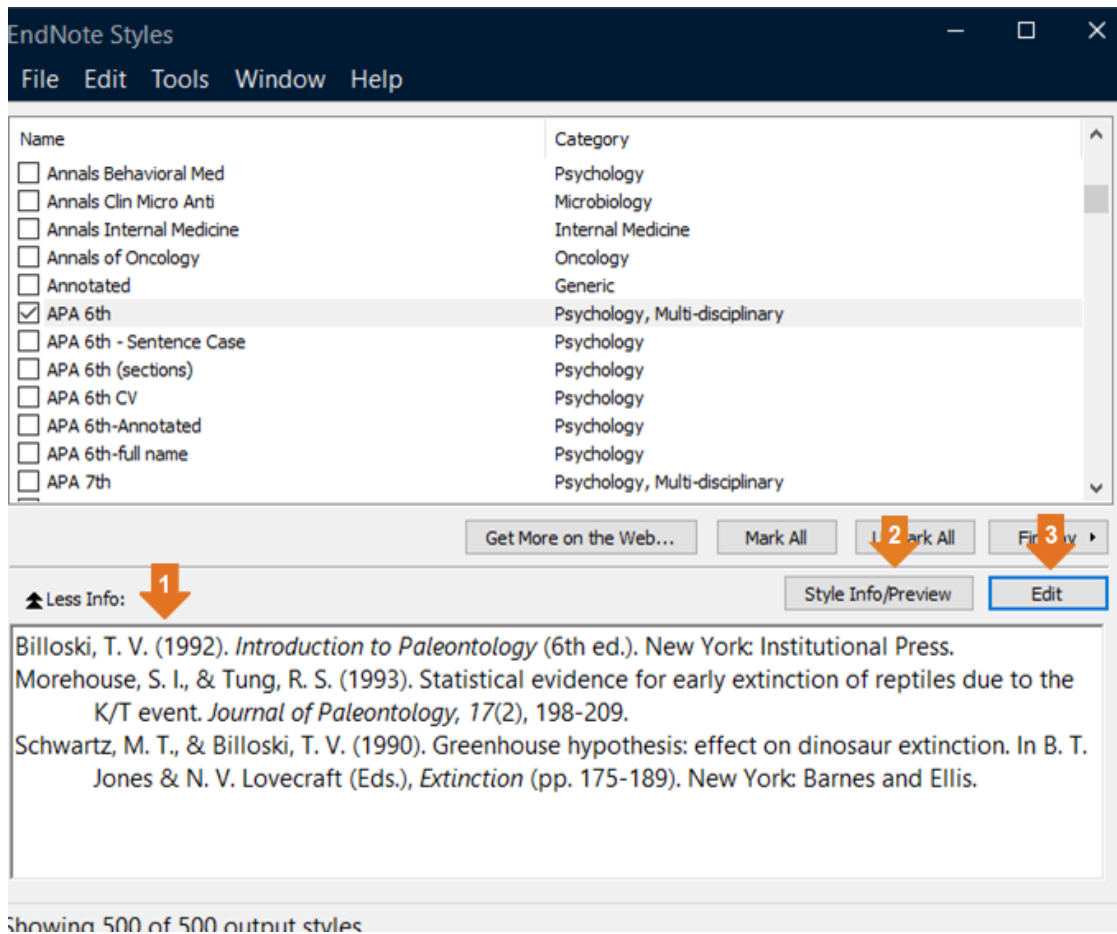
Figure 26: Output Style Manager

If you cannot find a suitable style either here or on the EndNote page, you have the option of customizing an existing style or creating a style yourself. We recommend selecting and customizing a style that is as similar as possible, as creating your own style requires a great deal of work.

If you wish to customize a style, select it in the Style Manager and click *Edit* to change it (3). The Style editor will open (Fig. 26).

The citation style defines what a citation should look like in the text (Citations, 2) or in the footnote (Footnotes, 4) and how the reference is displayed in the reference list (Bibliography, 3). Depending on whether it is a footnote style or an author-year style, make the settings either under field 2 or 4. Field 1 contains general information, such as how page numbers and journal titles are displayed and whether a reference list is created for each chapter or for the entire document. Section 5 (Figures & Tables) determines how figures and tables are displayed. Since this function is no longer

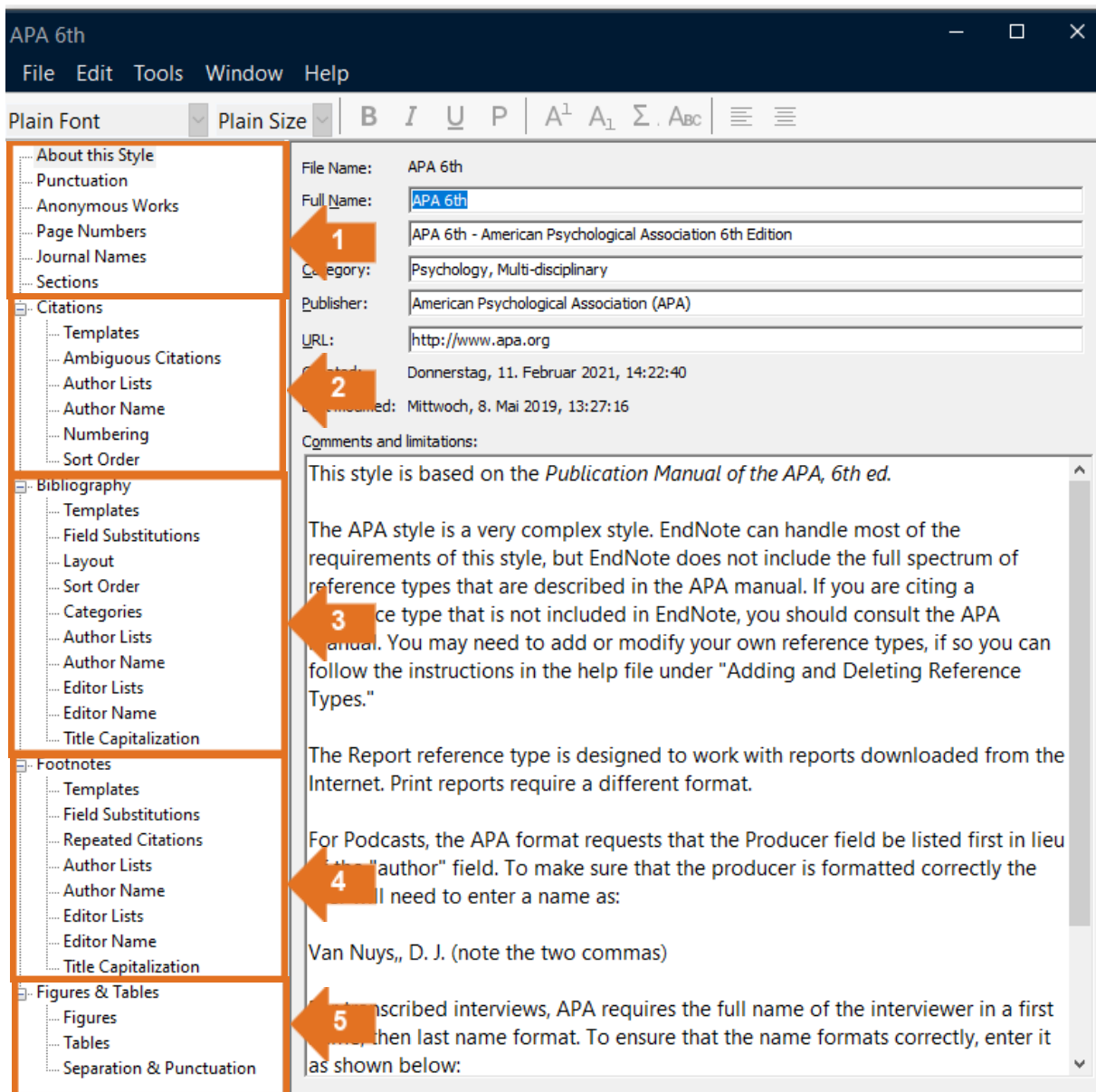maintained by EndNote, we recommend that you do not use it, but instead use the original Word features.

Figure 27: Output Style editor

6.1 In-Text Citations and Footnotes

In the *Citations* (2) or *Footnotes* (4) area (Fig. 26) on the left in the navigation, select the item *Templates* to specify the information in the text or in the footnote. In the citation style, all fields available in EndNote can be used, such as the fields *Author*, *Title*, *Year*, etc. In addition to the contents of the database fields, you can also use punctuation marks, letters and special operators. Database fields and operators can be found via the *Insert Field* button (Fig. 28). If, when using the *Insert Field* feature, you were to insert e.g. the field *Author*, it would not be the word author, but rather the content of this database field that is displayed in the citation. Punctuation marks separating each piece of information are entered by hand.
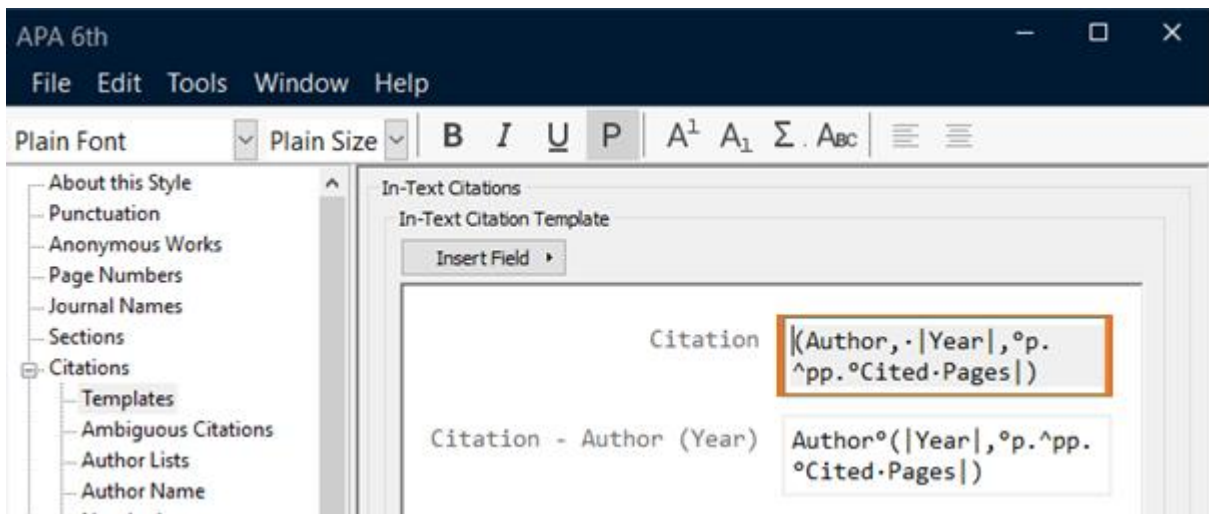
Figure 28: Customising in-text citation

It is important to remember that it is still possible that a field has no content. This could cause two punctuation marks to follow each other, or leave a piece of information such as *p.* for the page reference without a subsequent page indication. To prevent this, there are special operators with which text elements can be linked to the content of a field. Details like *p.* or preceding punctuation are then displayed only if there is also a page number.

Link Adjacent Text operator

The Link Adjacent Text operator (Fig. 29) helps to link text elements and field content. The text element is displayed only if the database field also has content. In Fig. 28 this operator is represented by a superscript circle symbol. Likewise, punctuation marks are linked with their subsequent elements. A Link Adjacent Text operator always sets a blank space automatically. The Link Adjacent Text operator can be found e.g. between the indication *pp.* and the field *Cited Pages*. Blank spaces are represented by a simple dot at the center of the line height (following e.g. the comma after the author's name).

If the linked text is the same as the name of the field, e.g. after the editor the word "editor" should appear, the text will be put into back quotes `editor`.

Forced Separation operator

If the content of a field is missing, there are pieces of text and characters in the immediate vicinity of this information, which should also not be displayed, while all other information should be given as normal. A definition for an in-text citation therefore contains a subdivision into sections of meaning. To show EndNote these sections, the operator *Forced Separation* (vertical bar) is used.

If EndNote now encounters a forced separator when reading this definition, it first checks whether the following database field has any content. If this is the case, the citation will be written on without displaying the operators. If the database field is empty, EndNote skips all information until the next forced separator and only then continues to write. To stay with the example of the page reference in Fig. 28, after an empty *Cited Pages* field, the entire content between the preceding forced separator and the following forced separator would be ignored, while the closing parenthesis after the forced separator would be displayed again.

Singular/plural operator

So far, the indication *p.^pp* has remained unexplained. This feature can be used to make different textual statements for singular or plural. Depending on whether the linked database content contains one or more pieces of information, either the singular or the plural version is displayed. This is especially used in English citation styles for editors' and page details. If there is a single editor, this is often indicated by (Ed.). If there are several, the specification is (Eds.). The singular version always precedes the singular/plural operator (circumflex), while the plural version is given behind it.

Formatting

If one piece of information is to be given a particular format, e.g. printed in italics, highlight the respective area and click on the appropriate formatting symbol at the top (Fig. 29).
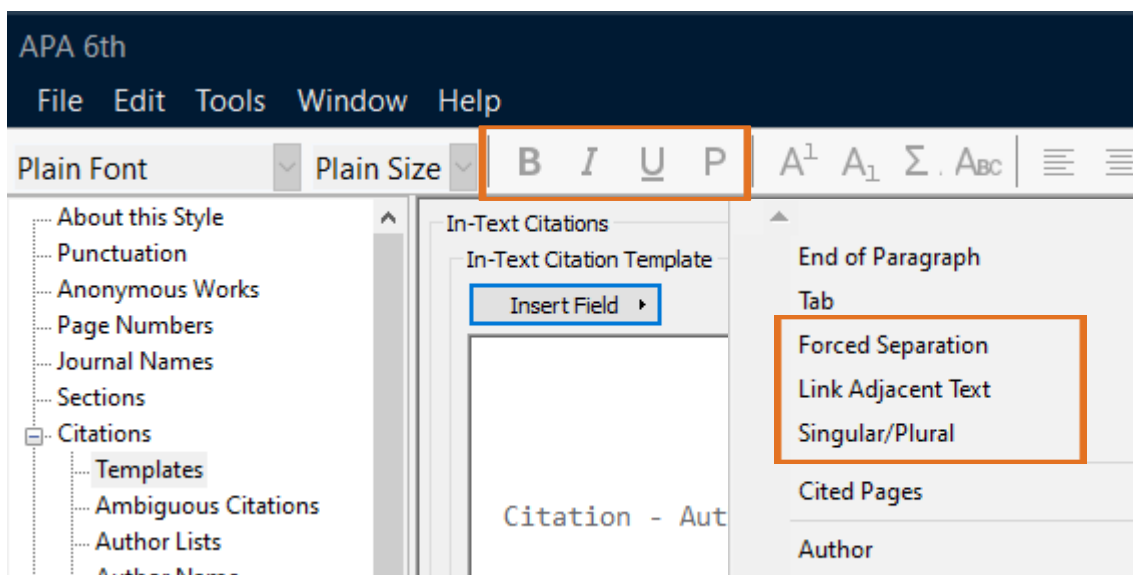

Figure 29: Operators for the definition of citation styles

In the section *Citation → Author Lists,* you can specify how to proceed with several authors. Should all or only the first x authors be named? And by which type of punctuation should several author names be separated from each other?

In the section *Citation → Author Name,* you specify how the author names should be displayed. Should first and middle names be mentioned? Should they be written out in full or abbreviated with initials? And in what order should they be named?

In the section *Citation → Sort Order,* you can specify the order in which the sources are given if you name several sources in one place.

6.2 The Entry in the Reference list

In the *Bibliography* section, select the item *Templates* to define sources in the reference list (Fig. 30). Define all document types (Reference Types) that you use in your work. To define a document type, select it in the *Reference Types* field (2). An empty field for the selected document type is displayed.

Use the *Insert Field* command (top right) to insert all the fields you need. Create your definition according to the description in chapter 6.1.
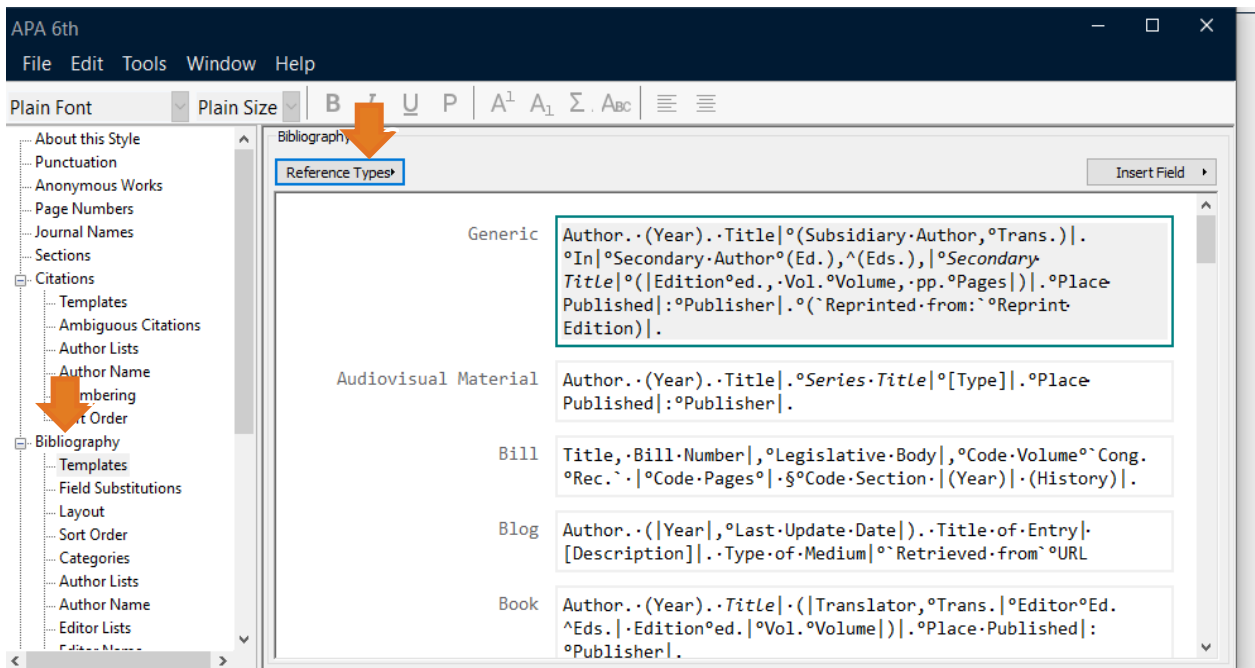

Figure 30: Defining the specification of different document types in the reference list

You also have additional options for the reference list in which you can specify how authors' and editors' names are to be displayed, how the reference list should be sorted, and the like.

6.3 Capitalization in the Reference list

You may have noticed that there are databases that import titles or authors in uppercase letters. If you want the titles and authors to be consistent in your reference list, there are several ways to achieve this.

6.3.1 Capitalization in Titles

This feature changes the case of titles for all cited references. It does not affect the view in End-Note, but only the output in the reference list.

To do this, edit your citation style → Menu *Tools* → *Output Style* → *Open Style Manager*. Choose your citation style and click *Edit*.

Under the heading *Bibliography* you will find the item *Title Capitalization* (Fig. 31).

Select whether the title should be specified in the reference list as it was entered in EndNote, in the
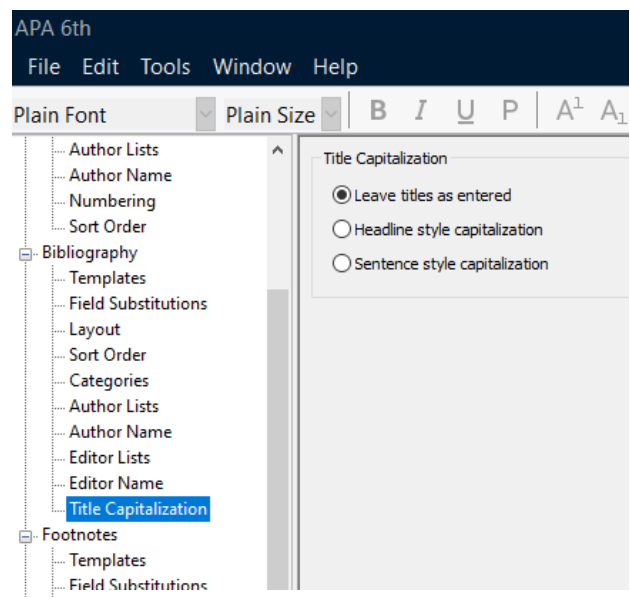

Figure 31: The capitalization in the citation style

headline style (all words capitalized except for articles and prepositions) or in the sentence style (first word in uppercase, otherwise only uppercase nouns).

6.3.2 Capitalization of Author and Editor Names

You can indicate directly in the citation style how author and editor names should be displayed.

To do this, edit your citation style → Menu *Tools* → *Output Style* → *Open Style Manager*. Choose your citation style and click *Edit*.

Under the headings *Citations*, *Bibliography*, and *Footnotes* you will find the items *Author Name* and *Editor Name*.

Use the drop-down menu *Capitalization* to choose how the names appear in the reference list, in-text citation, or footnote (see Fig. 32).
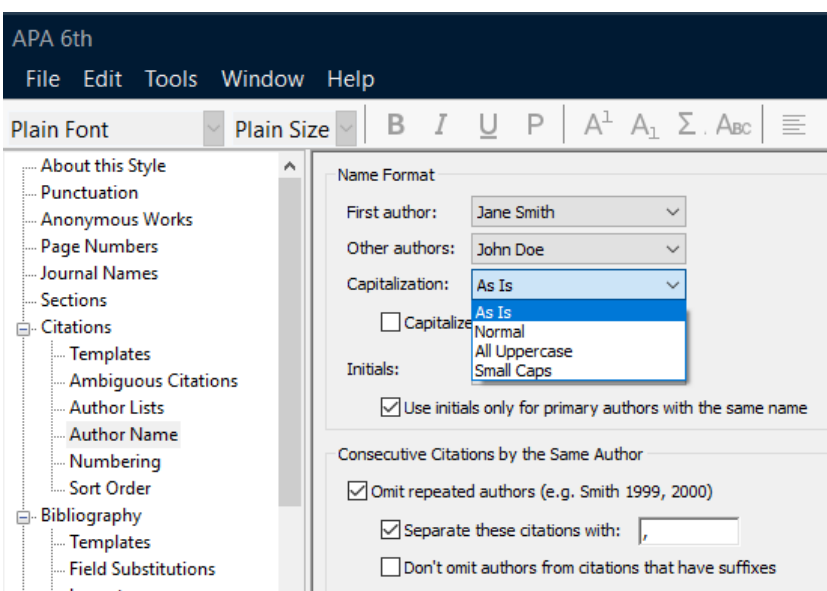

Figure 32: Setting the capitalization of author names

7 Collaboration and Synchronization with EndNote Web

EndNote Web is a web-based reference management program that enables location- and computer-independent work and collaboration. TUM members can use EndNote Web both in conjunction with EndNote Desktop and without a desktop version.

7.1 Activating EndNote Web

If you have already installed EndNote Desktop, you can, as long as you are connected to the Internet, create your EndNote Web Account directly from within EndNote Desktop. To do this, go to the

item *Preferences* in the *Edit* menu, go to *Sync* and click on the button *Enable Sync*. Follow the instructions. Create your account with your TUM e-mail address. Alternatively, you can go there via *Library > Sync* or click on *Sync Configuration* on the left in the program.

In EndNote Web, you also have the option to download the EndNote Web plug-in, which helps you to capture web pages quickly.

If you already have an EndNote Web account when installing EndNote Desktop, you can also incorporate it directly at that point.

In order to use EndNote Web without EndNote Desktop, go to the *Web of Science* database, follow the link to EndNote in the *Tools* menu and create an EndNote Web account using your TUM e-mail address (Fig. 33).
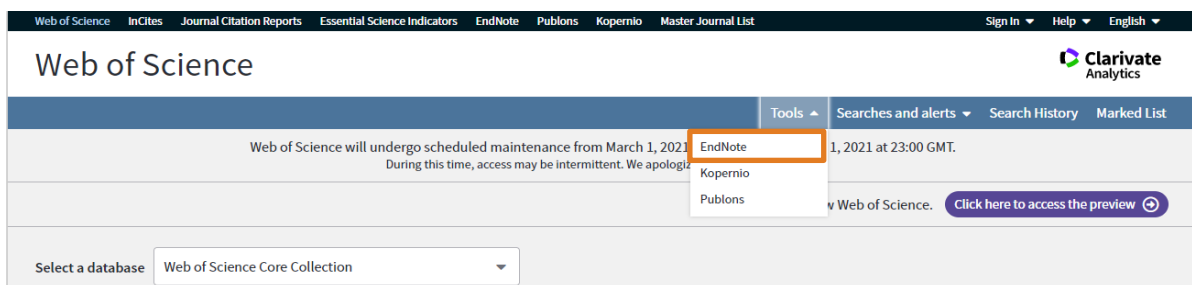

Figure 33: Link to EndNote Web in the Web of Science

7.2 Synchronization between EndNote Desktop and EndNote Web

You can transfer data from your computer to your EndNote Web account as well as, conversely, copy it from your EndNote Web account to your computer.

If you want to synchronize data between different devices, synchronization will always occur via EndNote Web. The data transfer is triggered by the end device in use.

All references including full texts, Group Sets and all types of groups are synchronized. Group Sets, Smart and Combined Groups are not displayed in EndNote Web, however, after the synchronization to another end device they reappear in EndNote.

Since everything is always transferred during synchronization, it is advisable to create one single EndNote library in total. If you work on several projects, it makes sense to organize the projects using Group Sets and groups.

In addition to synchronization between your own devices, groups and libraries can also be shared with other EndNote users. What is shared varies. Here is an overview (Abb. 34):

	EndNote Online	Desktop	Shared Group	Shared Library
References	✔	✔	✔	✔
Custom Groups	✔	✔	✔	✔
Smart Groups	✘	✔	✘	✔
Combined Groups	✘	✔	✘	✔
Group Sets	✘	✔	✘	✔
PDFs	✔	✔	✘	✔

Figure 34: Overview on synchronization and sharing options

7.3 Sharing a Group

As with the Custom Groups in EndNote Desktop, you can also create groups here. You can share them with up to 1,000 other EndNote Web users, to whom you individually assign either read-only or read and write permissions.

To share a Group with others in EndNote Desktop, (from EndNote X9 onwards)

1. go with your cursor to the group you want to share and right-click to open the context menu. Choose *Share Group.*
2. in section *Invite More People,* insert the e-mail addresses of the people you want to share your group with.
3. for each person, choose whether they shall have read-only or read and write access.
4. you may enter a personal note to the recipient in the field *Add A Message.*

The e-mail address does not have to be the one the other person registered their EndNote Web account with.

To share a group with others in EndNote Web,

1. go to *Manage My Groups* in the *Organize* menu,
2. create a new group or select an already existing group whose entries you wish to share and go to the *Manage Sharing* button.
3. Now add collaborators and assign the desired editing rights. To add collaborators, you need the e-mail address with which the person created their EndNote web account. Note, however, that you cannot share file attachments (e.g. PDFs).

Your shared groups are displayed as such in your own library after synchronization (see Fig. 35) while a shared library appears as a new library for the others (see Chapter 7.4). Groups others shared with you are displayed in your EndNote Desktop under the heading *Groups shared by others.* First the e-mail address of the group's owner is displayed, then the name of the group (s. Fig. 36). The name is linked to the shared group in EndNote Web. Clicking on the title will open the group in EndNote Web. However, you will no longer see in EndNote Desktop how many references are stored in the group or which references are included.
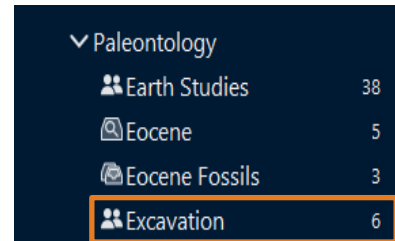
Figure 35: Displaying shared groups in EndNote Desktop
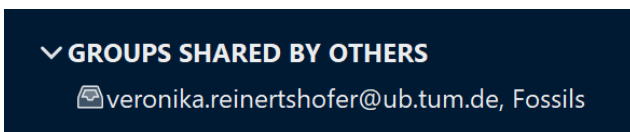
Figure 36: Displaying groups others shared with you in EndNote Desktop

7.4 Sharing an EndNote Library

You can share your entire EndNote Library with up to 100 other EndNote Web users. References, full texts and groups are shared. Up to EndNote X8, all collaborators have full editing rights. From X9 onwards you can also assign a read-only right.

To invite others to share your library, open the library in your desktop version and click *Share* in the *File* menu. In the following dialog box, enter the e-mail addresses of all persons with whom you wish to share your library (Fig. 37). This does not have to be the e-mail address with which the other person created their EndNote web account. Furthermore, you define whether the person should have read-only or read and write access. Invitees receive an invitation via e-mail, which they must accept before they can access your library.

As long as the invitation has not yet been accepted, the status will be indicated as *Pending*, once the invitation has been accepted it will change to *Member*.

You can share <u>one</u> library of your own, but you can use any number of other libraries to which you have been invited to by others. To edit someone else's library, choose the command *Open Shared Library* in the *File* menu in EndNote. Depending on your rights,
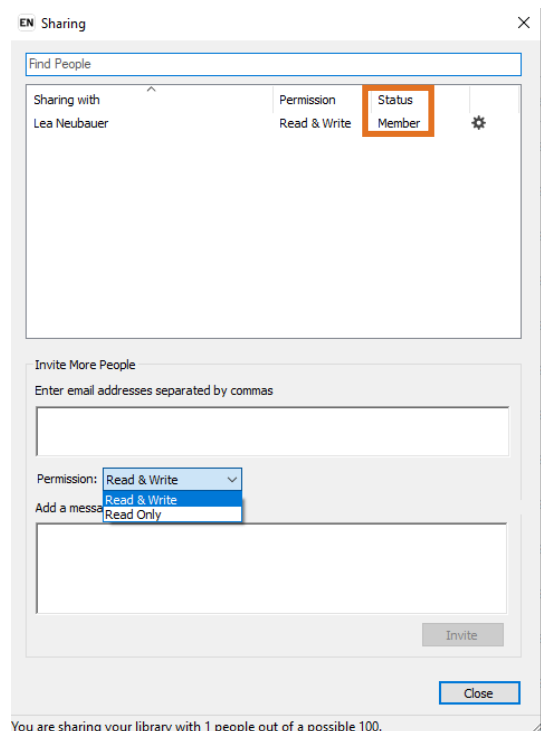

Figure 37: Inviting other EndNote users to a shared library

you can now either read or read and edit the library as usual.

Libraries shared with you are only visible in your desktop version, not in your EndNote web account.

Changes made in a shared library can be tracked via the Activity Feed (see Fig. 38). The last 500 changes are displayed.
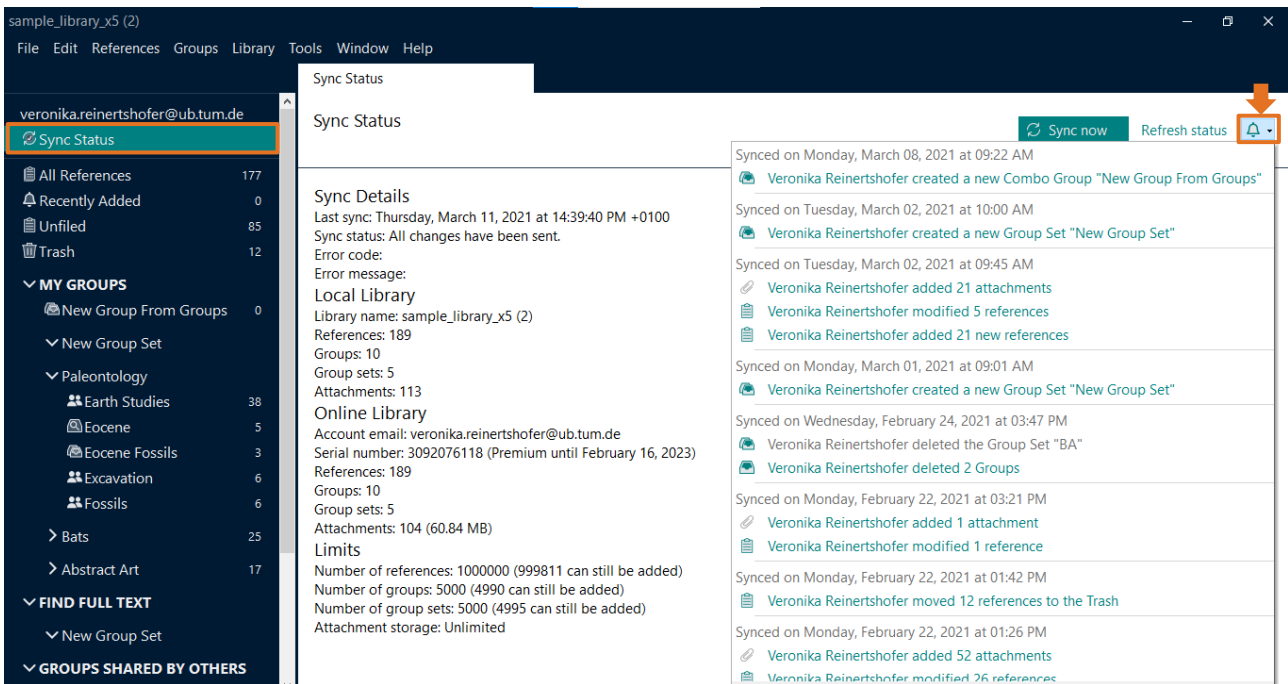

Figure 38: Activity Feed

7.5 CWYW for EndNote Web

In the Cite While You Write *Preferences*, choose whether to allow CWYW to access EndNote Desktop or your EndNote Web Library. In the tab *Application*, choose *EndNote online* instead of *EndNote* and confirm with *OK* (Fig. 39).

7.6 Collaborative Use of the EndNote Library with the Desktop Version

An EndNote Library is not designed to be edited by more than one person at a time. Even if the file is stored on a shared drive, it can only ever be edited by one person. For all others the file is locked. Even a read-only copy cannot be opened in this case.
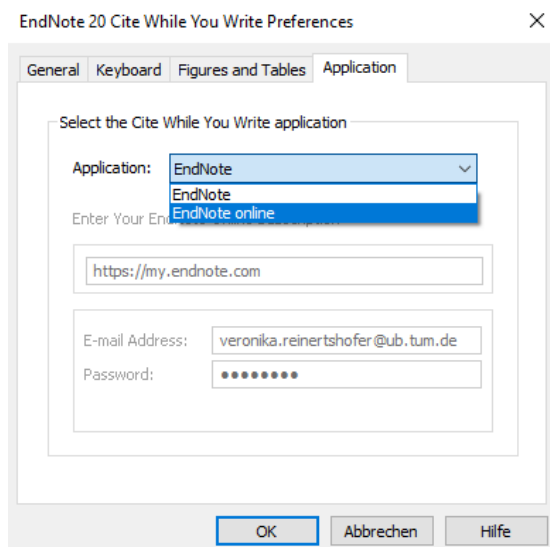
Figure 39: Cite While You Write Preferences in Word

However, the following solution would be conceivable: There is a team member who has stored and maintains the EndNote Library locally on their computer or drive. They save a read-only copy of the library on the shared drive for all colleagues to view and regularly replaces it with the updated file. The team members can open the read-only file simultaneously and are able to search in it, create bibliographies, copy datasets, and cite in Word.

7.7 Compatibility with Programs like Evernote, Scrivener, etc...

In contrast to Microsoft Word and also the OpenOffice Writer for Windows, there is no Cite While You write plug-in (CWYW) for other programs. If you work with another program such as Scrivener, you have the following options:

If you would like to add a source to your text, mark the corresponding entry in EndNote and copy it into your text via Ctrl+C/Ctrl+V. In your text-processing program, the citation will look like this: {Author's Last Name, Year #EndNote ID}. Once you have finished writing your work and inserting all the sources, save your text as an .rtf or .odt file.

You can then feed them into EndNote via the menu *Tools → Format Paper*. A dialog box opens in which EndNote displays all the citations it can match (Fig. 40). Use the *Output Style* drop-down menu to specify in which citation style the citations and reference list are formatted. Then click on *Format* and select location, file format and file name.

The temporary citations in curly brackets are replaced and the reference list is created. Unlike in Word, this reference list is not automatically updated when you insert a new reference, since it consists of static text, not active field functions. If you want to add or change citations at a later date, please use your original text, which still contains the citations in curly brackets, otherwise you will be provided with a second reference list when reformatting. Adapt this text and format the document again.
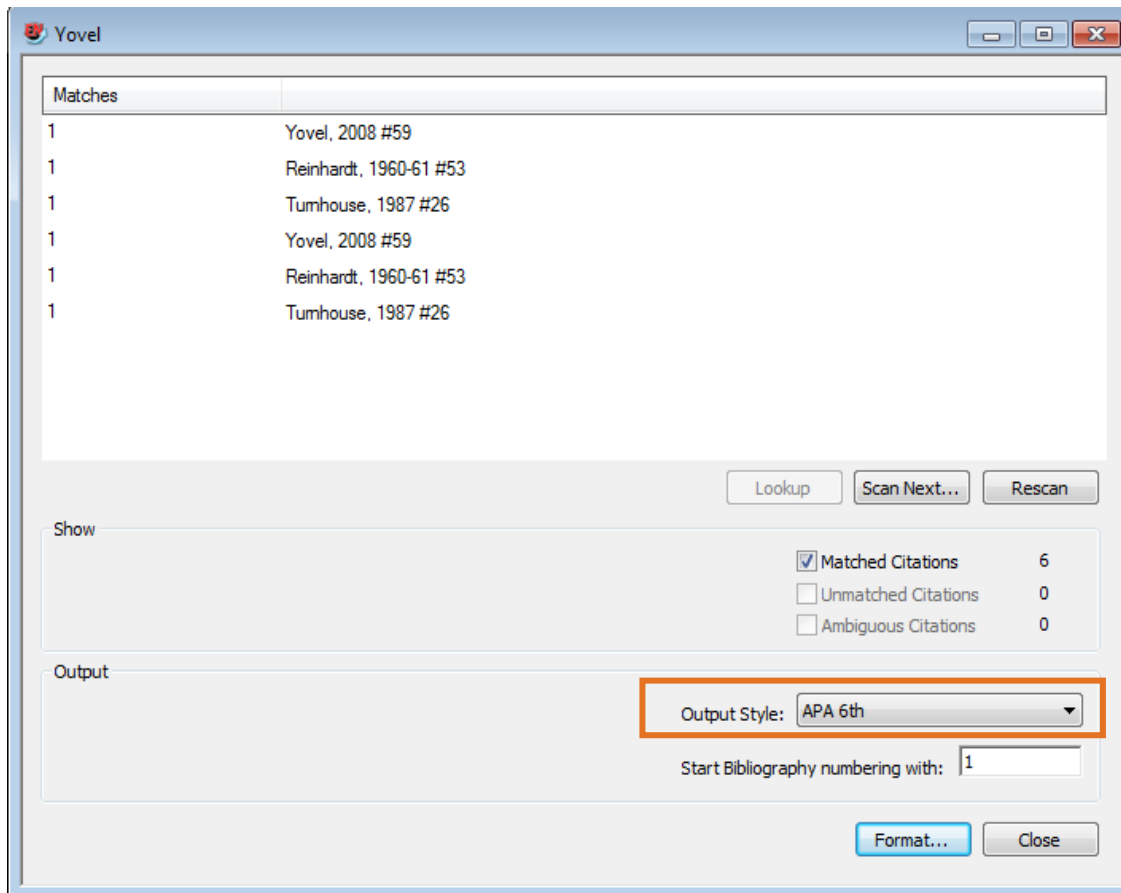
Figure 40: Zitation und Literaturverzeichnisse in .rtf- oder. odt-Dateien formatieren

8 Manuscript Matcher – How Do I Find an Appropriate Journal for my Article?

Via the EndNote web account, EndNote allows you to search for journals appropriate to the contents of your article, to which you can then submit it. This feature is called Manuscript Matcher. You can find the feature in your EndNote Web Account via the menu *Match* (Fig 41).
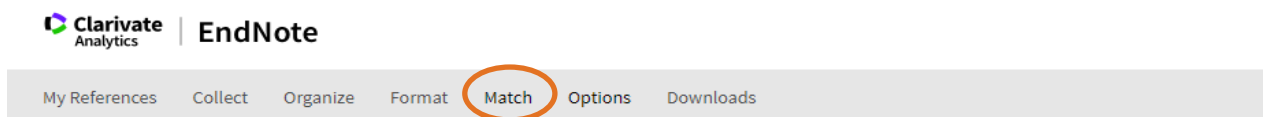

Figure 41: Manuscript Matcher in EndNote Web

There you enter the title and abstract of your article. Including your references is not mandatory, but allows a much better search result. If you have collected your references in a group in EndNote Web, select this group in the field *References* (Fig. 42).
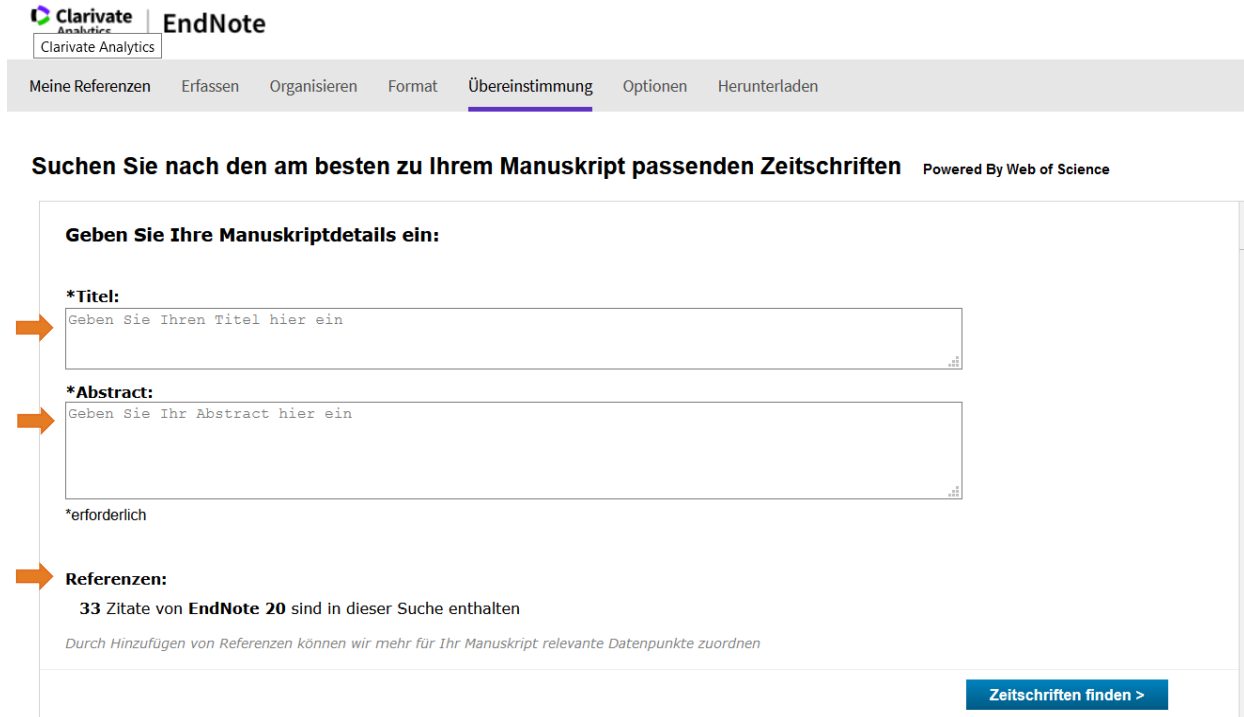
Figure 42: Manuscript Matcher – Entering details of the article

From EndNote X9 on, you find this function in EndNote desktop and Word as well.

EndNote Desktop: Menu *Groups* > *Manuscript Matcher* (For this function to be active you need to have selected a group.)

Word Add-in: EndNote toolbar > *Manuscript Matcher* (see Fig. 43)

Starting the Manuscript Matcher from EndNote desktop or Word, the references from the selected group or the Word document are automatically transferred.
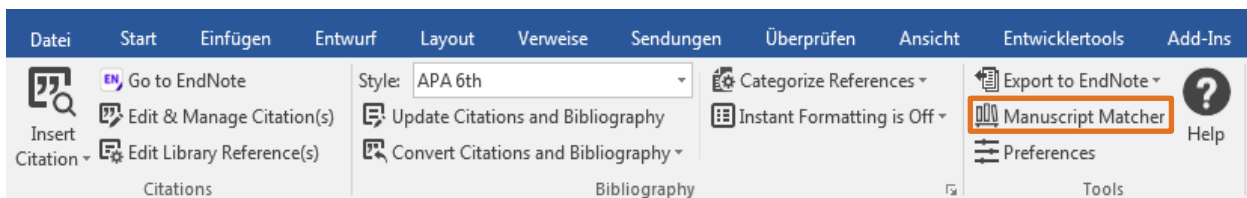
Figure 43: Manuscript Matcher in Word

On the basis of the title, the abstract and possibly the sources, the Manuscript Matcher searches the Web of Science for journals in which similar articles are published. The result might appear as in e.g. Fig. 44:

Figure 44: Journal recommendations in the Manuscript Matcher

You will receive up to ten suggestions. For each journal, you can see how well keywords in your paper coincide with the journal's content (1), the Impact Factor (2), and the specialist area this journal can be associated with (3). You will receive information about the publisher of the journal (4), a link to the homepage where you can find further information (5), and a direct link to submit your article to the respective journal (6). In Fig. 42, you can also see that Open Access journals are marked as such (7). You can find a video about the Manuscript Matcher here: https://youtu.be/rt0rT0wemrI.

Please note that this does not guarantee that your article will be accepted.

9 Further Import Options

In addition to what the EndNote Introductory Course has already shown as options for importing preferences into EndNote (manual, export from the online catalog, export from databases, online search via EndNote), there are further import options. For example, Endnote offers a bookmarklet to quickly add Internet sources, while Google Scholar provides a special download link for the import into Endnote.

9.1 EndNote Capture Bookmarklet

The EndNote Capture bookmarklet allows you to capture Internet sources. The bookmarklet can be found in your Endnote Web Account in the *Download* menu. Drag and drop the bookmarklet *Capture Reference* into the toolbar of your browser (Fig 45).
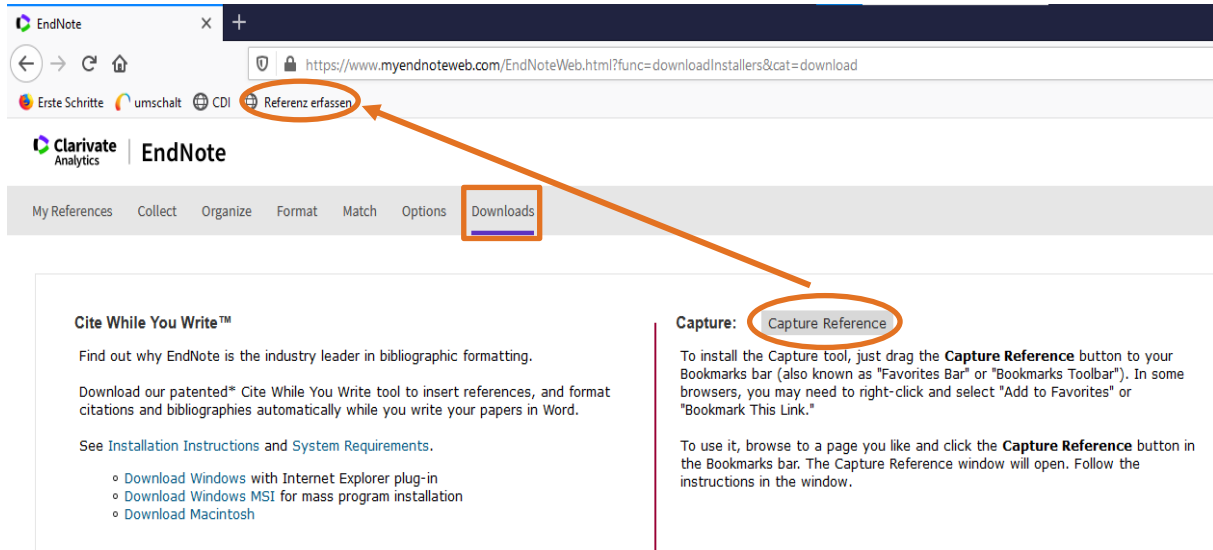

Figure 45: Setting up the EndNote Capture Bookmarklet

For example, if you want to save a website as a reference, click on the bookmarklet in your browser. The following window will open (s. Fig. 46):
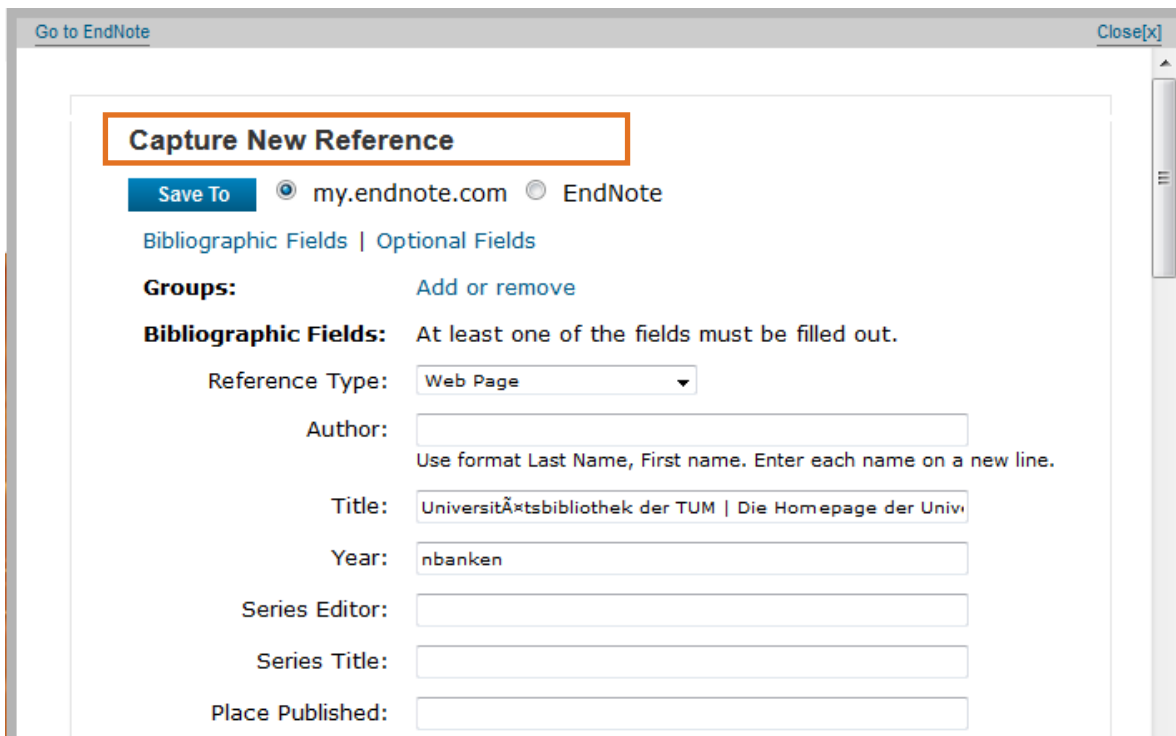

Figure 46: Saving an Internet page with the EndNote Capture Bookmarklet

EndNote takes over the data it can find as reference. Especially with websites, this information is often incomplete and incorrect. Therefore, check and complete the data carefully. Then choose whether to save the reference in Endnote (Desktop) or directly in your EndNote Web account (my.endnote.com). Click on *Save To,* to save the reference (Fig. 46).

9.2 Import from Google Scholar

In Google Scholar, you have the option to obtain a direct link to the import of references in End-Note (see Fig.47).
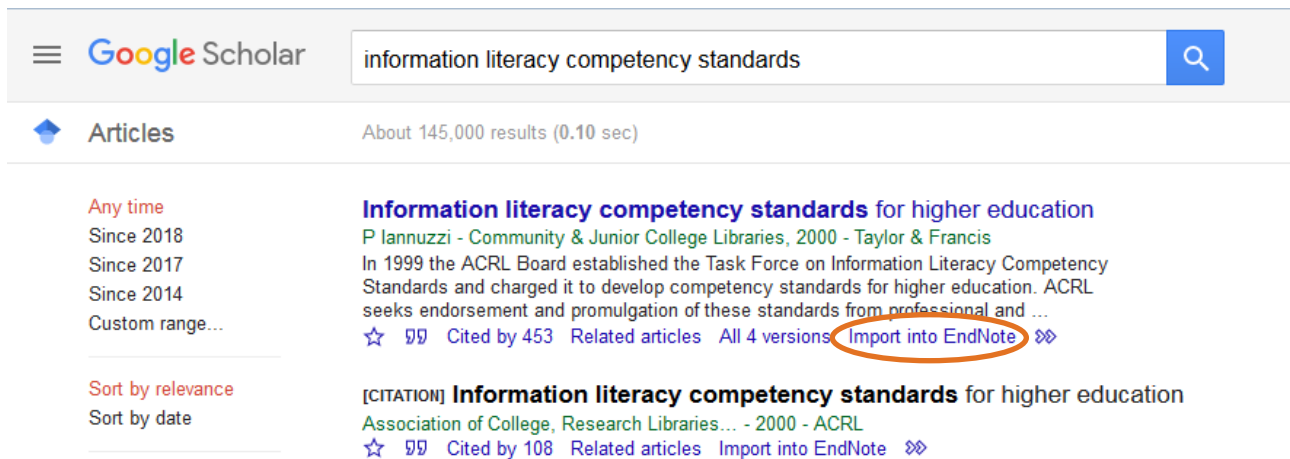

Figure 47: EndNote import link in Google Scholar

To set this up, go to Google Scholar's *Settings* and then to the tab *Search Results*. Under *Bibliography manager*, and select *Show links to import citations into EndNote* (Fig. 48). Select EndNote from the drop-down menu. Save the changed settings. During your next search you will see a link below each title, which allows direct import to EndNote. Import the data just as you import from databases or catalogs, via direct import, by opening the import file directly with Endnote.
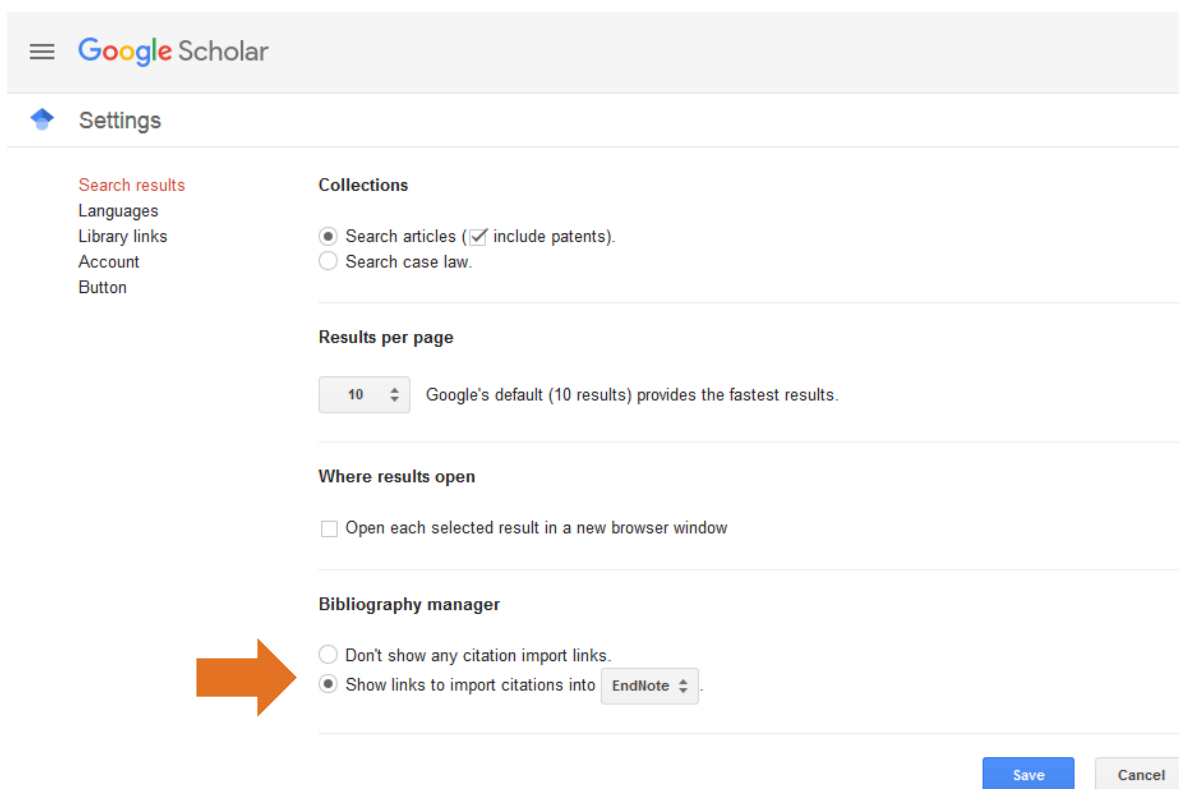

Figure 48: Setting up the EndNote import link in Google Scholar

10 Contact and Support

If you have any questions about EndNote, you can get help and support in a number of ways:

10.1 Help from EndNote

Manual
Within the program, you can find the EndNote manual *via the shortcut F1*.

Technical support
You can get technical support via: https://support.clarivate.com/s/

10.2 Help from the TUM

If you have questions, you are also very welcome to contact the university library: literaturverwaltung@ub.tum.de.

Video Tutorials and Lecture Notes
Video tutorials and scripts can also be found in our E-Course at:
https://www.ub.tum.de/en/ecourse/reference-management-with-endnote-advanced-course

TUM Citation Guide
If you have questions about citing, the TUM Citation Guide can help: https://media-tum.ub.tum.de/1225458

Reference Management and Citation Consulting by the TUM University Library
In addition to our reference management courses, we also offer a reference management consulting, where individual questions can be discussed (online, phone, in-person).

To make an appointment see https://www.ub.tum.de/en/consultation-citation

10.3 Miscellaneous

To safeguard your data, do regular backups. You have two options for this: Either save your data in the form of a compressed library in .enlx format or export the library in .txt, .rtf, .htm or .xml format. Both options can be found in the *File* menu.

Connection Files, Import Filters & Output Styles
You can customize your own installed copy of EndNote according to your needs.

Connection Files*
Connection files to additional catalogs and databases can be downloaded from the EndNote website: http://www.endnote.com/support/enconnections.asp

Import filters*
Downloads for additional import filters are also available on the EndNote website: http://www.endnote.com/support/enfilters.asp

Updates

EndNote updates are available at: http://endnote.com/downloads/available-updates

Please note that you must first uninstall EndNote before installing a newer version.

Output Styles (Citation Styles)

Additional citation styles are available at: http://www.endnote.com/support/enstyles.asp

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