Exercise Sheet: Reference Management with EndNote - Advanced Course

To get you started
Open either your own EndNote Library, which already contains references, or the sample library, which you can find at C:\Users\Public\Documents\EndNote\Examples on your computer.

Exercise 1 - Annotate PDFs
Select a reference with attached PDF in EndNote. Make some comments and markings in the PDF. Then search for your comments using the search function in EndNote (e.g. using the search category PDF Notes).

Exercise 2 - Importing Folders with PDFs
a) Use *File > Import > Import Folder* to import a folder from your computer containing some PDFs. Include files in subfolders and have EndNote create a group set for this import.

b) Check the records of the imported PDFs. Add or correct the details if necessary.

Exercise 3 - Setting Up the Auto Import Folder
In the Preferences (*Edit > Preferences > PDF Handling*) set up an Auto-Import Folder and activate the automatic import from this folder to EndNote.

Exercise 4 - Replace PDF Names
Set the Preferences so that your PDFs are automatically named with author, year and title of the document (*Edit > Preferences > PDF Handling*).

Exercise 5 - Columns Displayed
Edit the view of your references in EndNote so that the columns are displayed in the following order: Read/Unread - File Attachments - Rating - Author - Title - Year - Journal

Exercise 6 - Rating and Read/Unread Status
a) Assign ratings of 0-5 stars for some titles in your EndNote Library. Mark some titles as read, others as unread.

b) Now, search for all titles that you have rated with at least three stars.

Exercise 7 - Groups - Smart Groups - From Groups
a) Create a new Group and call this *Exercise 7 Group*. Assign any number of references to this group.

b) Create a Smart Group named *Exercise 7 Smart*, in which you want to find titles that you have rated with at least 3 stars and that have been published in the last 2 years.

c) Now, create a Combined Group in which you merge the references of the group *Exercise 7 Group* and *Exercise 7 Smart*. Call this *Exercise 7 Combo.*

Exercise 8 - Term Lists
a) Open the term list for journals and see which journals are already included.

b) Import one of the predefined term lists for journals for your field (*Library > Open Term Lists > Journals Term Lists > Tab Lists > Import List...*)

Exercise 9 - Search within EndNote
a) Use the advanced search form in EndNote (not the Simple Search) to search for all references that you have rated with three or less stars and that have been published in the last five years.

b) Save your search or convert it to a Smart Group using the *Search options* button in the search form.

Exercise 10 - Creating Subject Bibliographies by Keywords, Authors or Years
a) Create a bibliography that is grouped according to a certain criterion, e.g. the keyword (menu *Tools > Subject Bibliography*).

b) Save this list in the style of citation you want. You can sort and format the reference list using the *Layout* button.

Exercise 11 - Upper/Lower Case in the Reference List
b) Change the case of all references in the reference list for your chosen citation style using the *Title Capitalization* function. Open the desired citation style (output style) for editing (Menu *Tools > Output Sytles > Open Style Manager > Choose your style > Edit Style*).

c) In your citation style, specify how author names should be listed in the reference list: *As is, Normal, All Uppercase* or *Small Caps*.

Exercise 12 - The Travelling Library
a) Open a Word document in which citations have been inserted with EndNote. (If you have none, create a new Word document and insert some citations.)

b) Export the Travelling Library of this Word document to a new EndNote Library.

c) In EndNote, check how many references you have already quoted in the opened Word document.

Exercise 13 - Import and Edit Citation Styles
a) Open the style manager and go to *Get more on the web*. Search the EndNote website for the citation style *APA 6th Sentence Case* and import it into EndNote.

b) Change the citation style so that for the document type *Journal Article* the author name is displayed in bold and written out completely.

c) In the case of three or more authors, just the first author shall appear, the others should be abbreviated as et al.

d) Before the title in the journal article, a colon should appear instead of the dot.

e) The journal title should be introduced and written out in full in italics.

f) The page specification should be introduced by a p. for one page and by pp. for several pages.

Make sure that text elements are never displayed without the corresponding field contents. Use the function *Link Adjacent*.

Exercise 14 - Other Import Options
a) Go to Google Scholar's search settings and select EndNote as the reference manager for importing individual titles. Perform a search and import a title directly into EndNote.

b) Install either the *Capture* bookmarklet or the EndNote toolbar for Firefox (in EndNote Web/Online > Tab *Downloads*). Search in Pubmed and import an article via the bookmarklet or the EndNote toolbar.

c) Then include any website as a reference using the bookmarklet or toolbar.

Lecture Notes: Reference Management with EndNote – Advanced Course:
https://mediatum.ub.tum.de/1439512

TUM Citation Guide https://mediatum.ub.tum.de/?id=1225458

Reference Management Consultation:
Online, by phone or in-person. By appointment. Further information can be found at:
https://www.ub.tum.de/en/consultation-citation

We welcome your feedback.
This exercise sheet is updated regularly. Should you nevertheless notice that the above information is no longer up to date or if you have any suggestions for improvement, we would be happy to receive an e-mail at workshop@ub.tum.de.

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