

Stephanie Hofmann & Bobby Neuhold

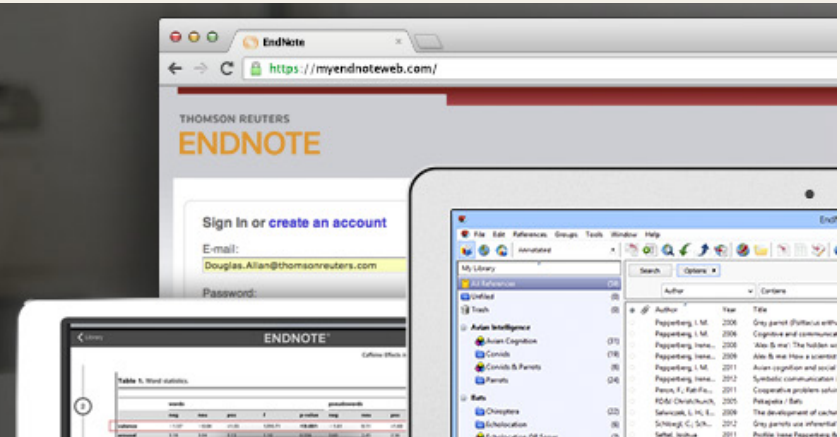
contact: [info@lib4ri.ch](mailto:info@lib4ri.ch)



## Literature Management with Endnote

**Find, use and share  
research with EndNote**

It's for more than bibliographies. Sync your EndNote library across your desktop, iPad and online. Work on your research from anywhere.



\* Screenshot [www.endnote.com](http://www.endnote.com)

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Welcome

# Lib4RI Training Series

- ↗ Module 1  
Searching Scientific Information
- ↗ Module 2  
The Publication Process
- ↗ **Module 3**  
**Literature Management with Endnote**
- ↗ Module 4  
Complementary Exercises

## LIB4RI TRAINING SERIES

### Searching & Managing Scientific Information

Lib4RI's introductory course for PhD students  
and other affiliates of Eawag, Empa, PSI and WSL



#### MODULES

- 1 - Searching Scientific Information
- 2 - The Publication Process
- 3 - Literature Management
- 4 - Complementary Exercises

#### COURSE SITES

Eawag: Dübendorf & Kastanienbaum  
Empa: Dübendorf & St Gallen  
PSI: Villigen  
WSL: Birmensdorf & Davos

Online registration: [www.lib4ri.ch/services/trainings.html](http://www.lib4ri.ch/services/trainings.html)

# Module 3 – Literature Management with Endnote

9.00 – 9.15    **Introduction to Literature Management**

9.15 – 10.30    **Endnote**  
Presentation & Live Session (Part 1)

10.30 – 10.45    Break

10.45 – 12.00    **Endnote**  
Presentation & Live Session (Part 2)

# Thanks for your feedback

Help us improve our training by returning the feedback form enclosed in your documentation!

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**Course Evaluation**  
Lib4RI Training Series: Searching & Managing Scientific Information  
Module 3: Literature Management with Endnote  
Organisation:  Eawag  Empa  PSI  WSL  
Session date: \_\_\_\_\_

Please rate the following statements...

	5	4	3	2	1
<b>1 Content</b>					
a) Overall, the course fully met my expectations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) The knowledge provided is useful for my work	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) The level of difficulty and the comprehensibility of the presentations were appropriate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) There was a good balance between the course length and subject matter	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) Examples/exercises were appropriate and complemented the course content	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**2 Which topics could be shortened or excluded?**  
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.....

**3 Which topics were missing or should have been presented in more detail?**  
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Please rate the following statements...

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<b>4 Presentation and Organisation</b>					
a) The course was well structured and had a clear theme	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) The group size was appropriate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) The documents distributed are useful	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) The duration of the course and use of time were appropriate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) The course announcement and the information given were clear and correct	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**5 What did you like most?**  
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**6 What could be improved?**  
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Content				Presentation			
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# Why Literature Management & Software?

## Literature / Information Sources

- Books & book chapters
- Articles in journals & newspapers
- Conference proceedings
- Web pages
- Databases
- Software
- Images, audio & video, ...



by Meghan Dougherty,  
[www.flickr.com](http://www.flickr.com),  
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## Managing

- File, organise & update references (author, title, year ...) and corresponding media (articles, books, ...)
- Aim: a personal library for quick information retrieval & usage

## Advantages of dedicated software

- Import, edit, organise, sort and retrieve metadata & media
- Access library via
  - Desktop & Laptop
  - Web
  - Smartphone & tablet
- Share content with colleagues
- Use library for the writing of reports, articles, theses
  - cite references in your text
  - generate bibliographies
  - select / change output styles according to the requirements

# Reference Management Software – Features

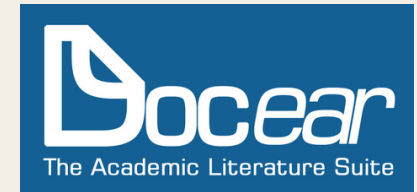
## ↪ Essential

- Add metadata & PDFs
  - Import bibliographic information from databases & publishers
  - Add & edit manually
- Organise references
  - Type (eg article, book, ...)
  - Metadata (authors, title, ...)
  - Personal groups / folders
  - Sort, search, tag, ...
- Find duplicates
- Read & annotate PDFs
- Cite references & create bibliographies in your word processor using various (editable) styles

## ↪ Recommended

- Built-in online search with (semi)-automatic import of references incl. PDFs
- Access from everywhere
  - PC, Mac, ...
  - Online / Web
  - iOS / Android
- Share & collaborate
- Import / export metadata (& PDFs) from / to other reference management software
- ...
- ...

# Common Reference Management Software



... and more

# Common Reference Management Software

## ↵ Endnote, Mendeley and Zotero

- Offer all a good variety of essential & recommended features

## ↵ Endnote (Thomson Reuters)

- Work horse for literature management (1<sup>st</sup> release 1988)
- Full licence (desktop version PC & Mac) can be obtained via your IT Services allowing for shared library use of up to 15 group members
- Online web client (limited functionality without EN Desktop)
- iOS (iPad) app available
- [www.endnote.com](http://www.endnote.com), [www.myendnoteweb.com](http://www.myendnoteweb.com)

## ↵ Zotero (open source)

- Intuitive handling due to web browser integration (Firefox)
- Free < 300Mb online storage (expandable \$, Dropbox capable)
- [www.zotero.org](http://www.zotero.org)

## ↵ Mendeley (Elsevier)

- Strengths in sharing / networking / online collaboration
- Free ≤ 2Gb, ≤ 3 group members (expandable \$\$\$)
- [www.mendeley.com](http://www.mendeley.com)



# Introduction to Endnote X7

## ↩ EN's GUI

- Create a new library (10)
- Graphical User Interface (11)

## ↩ Collect

- Endnote's built-in online search (16)
- Export / import after an external database search (21)
- Import metadata from PDFs (26)
- Manually adding & altering references (27)
- Find & attach full text PDFs (29)

## ↩ Organise

- Building groups (33)
- Checking & Updating references (34)
- Finding duplicates (35)
- Searching references (incl. PDFs & annotations) (36)
- Backing up your library (37)

## ↩ Cite

- Bibliographic output styles (39)
- Cite-while-you-write (MS Word) (44)
- Using journal abbreviations (48)

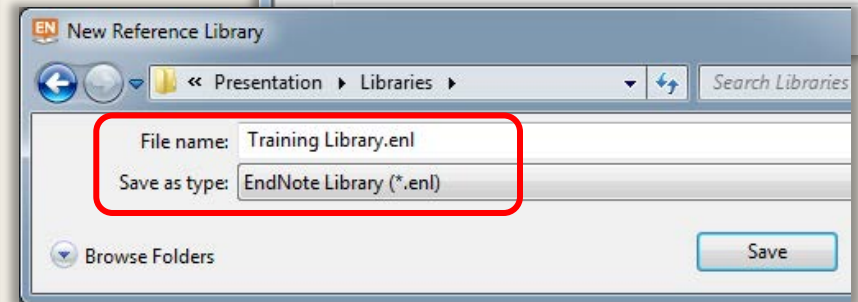
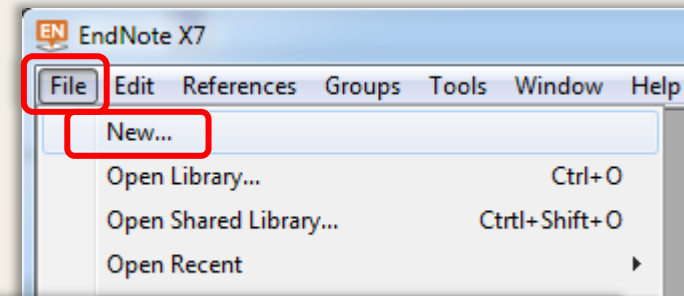
## ↩ Share & Sync

- Without EN Online Account (52)
  - Share references via E-mail
  - Share travel library via Word plugin
  - Share library as a compressed library or via servers
- With EN Online Account (55)
  - Sync between your devices
  - Share entire library (≥ EN X7.2)
  - Share groups (EN Online only)

## ↩ Concluding Info, Help & Useful Links

- Endnote can do more (60)
- Is Endnote the right thing for me (61)
- User Guides & Tutorials (63)
- Support, Forum, FAQ, Blogs, Community, ... (65)

# Create a New Endnote Library



- ↳ Tip: Endnote generates an \*.ENL file and a \*.DATA folder that need to stay together.
- ↳ Tip: While the \*.ENL file is the library with all metadata, the \*.DATA folder is the default location for attachments and also contains library related indexing files.

When EN opens for the first time a welcome screen asks you to setup your online account. There is no need to do this now. Just create a new or open an existing library via the <File> menu.

# The Graphical User Interface – Main View

Library Mode

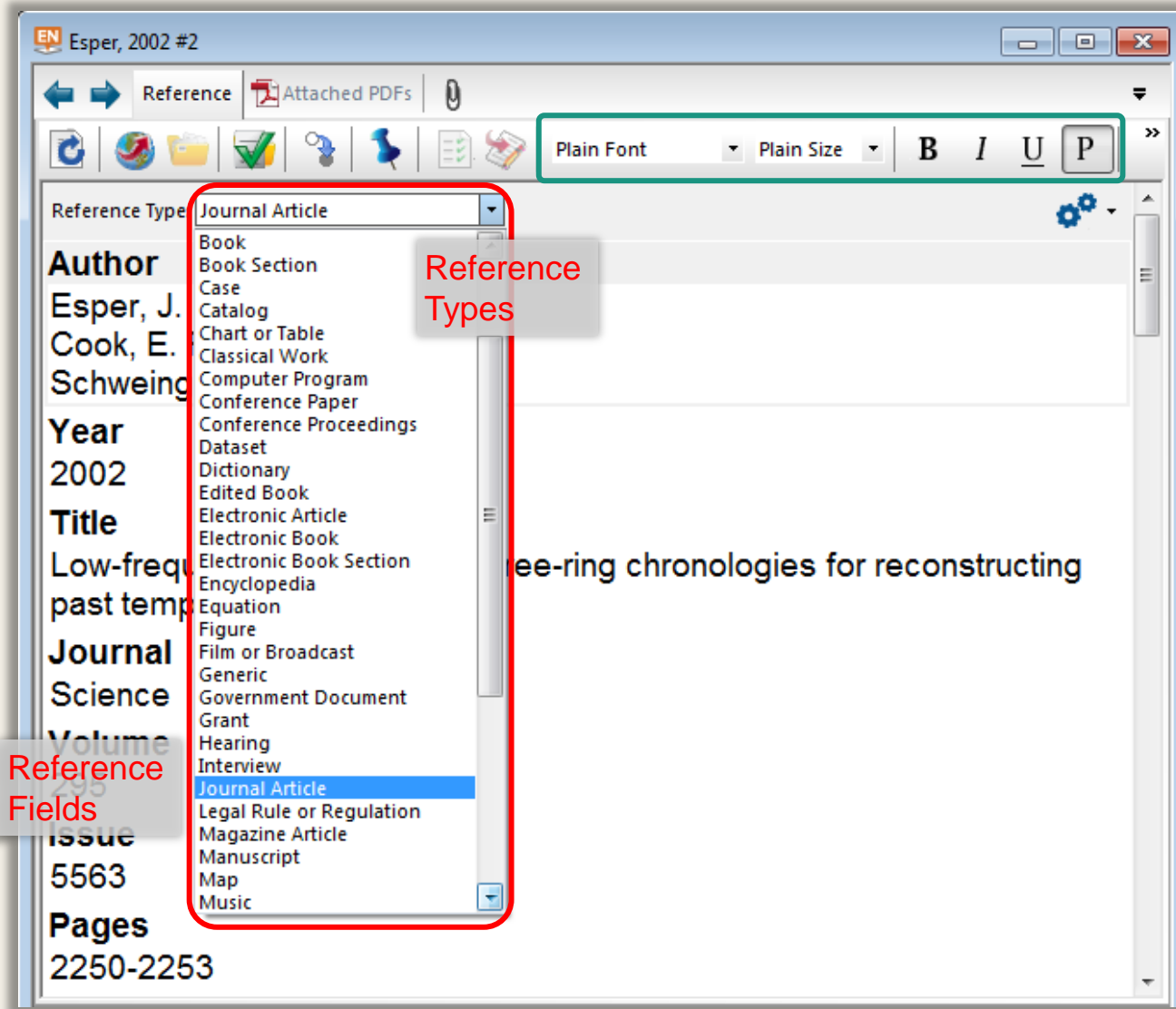
The screenshot shows the EndNote X7 interface with several key components highlighted by red boxes and labels:

- Output Style:** Located at the top left, above the toolbar.
- Search panes:** A central search area containing a search bar and three search criteria panes (Author, Year, Title).
- Reference list pane (sort & find):** A table listing references with columns for Author, Year, Title, Reference Type, and Journal.
- Reference details pane (reference details, citation preview & PDF):** A right-hand pane showing detailed information for a selected reference, including Author, Year, Title, Journal, Volume, Issue, Page, Start, and Date.
- Groups pane (organise):** A left-hand pane showing library organization options like All References, Sync Status, Unfiled, Trash, My Groups, Online Search, and Find Full Text.
- Adjust layout:** A button in the bottom right corner of the window.

Annotations include:

- A double-click on an entry opens the single reference view.
- The interface is in Library Mode.
- The current library is Training Library.enl.
- The current output style is APA 6th.
- The search criteria are Author, Year, and Title, all set to 'Contains'.
- The reference list shows two entries: Einstein, A. (1963) and Esper, J. (2002).
- The reference details for the selected entry (Esper, J.) are displayed on the right.

# The Graphical User Interface – Single Reference View



Tip: Keep the formatting to <P> (Plain) or else it overrules the formatting of the <Output Style>

- Each reference is associated with a <Reference Type>, eg <Journal Article> and contains in its <Fields>, the metadata, eg <Author>
- Each <Output Style> use this information to generate citations and bibliography in your document

# The Graphical User Interface – Citation Preview

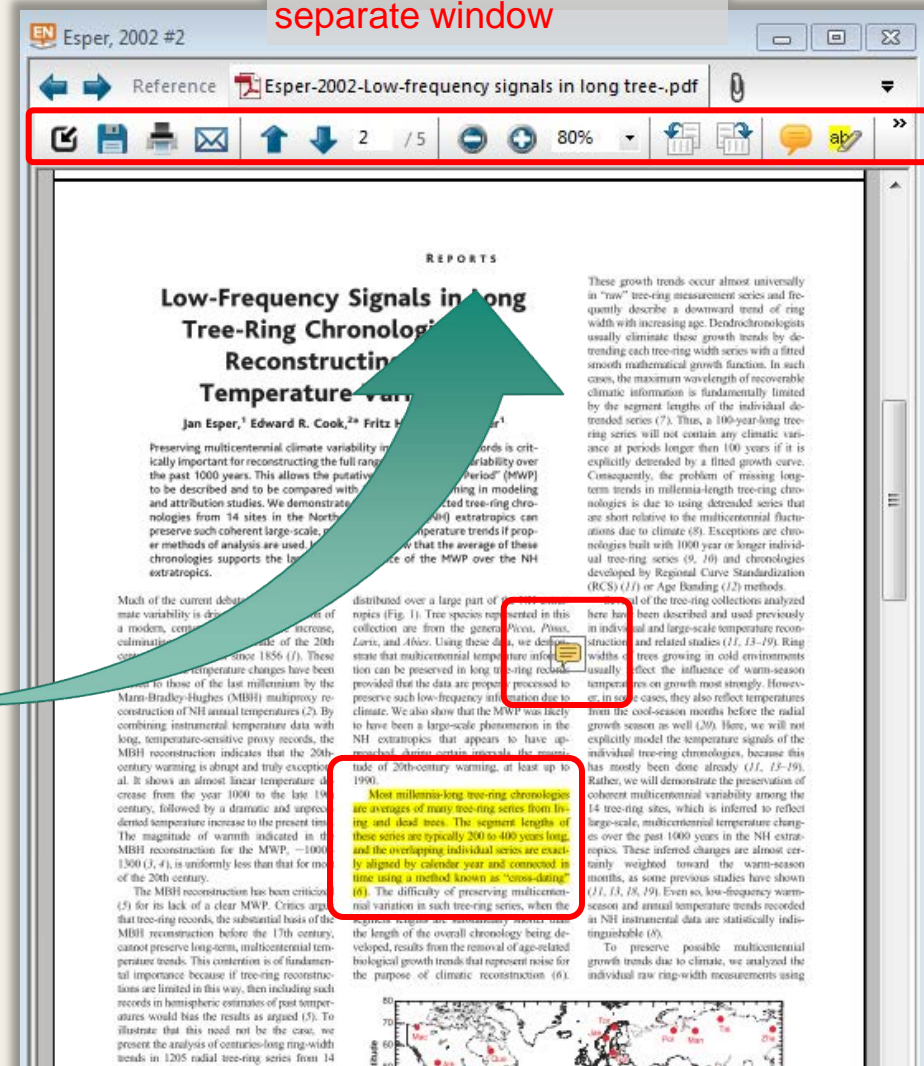
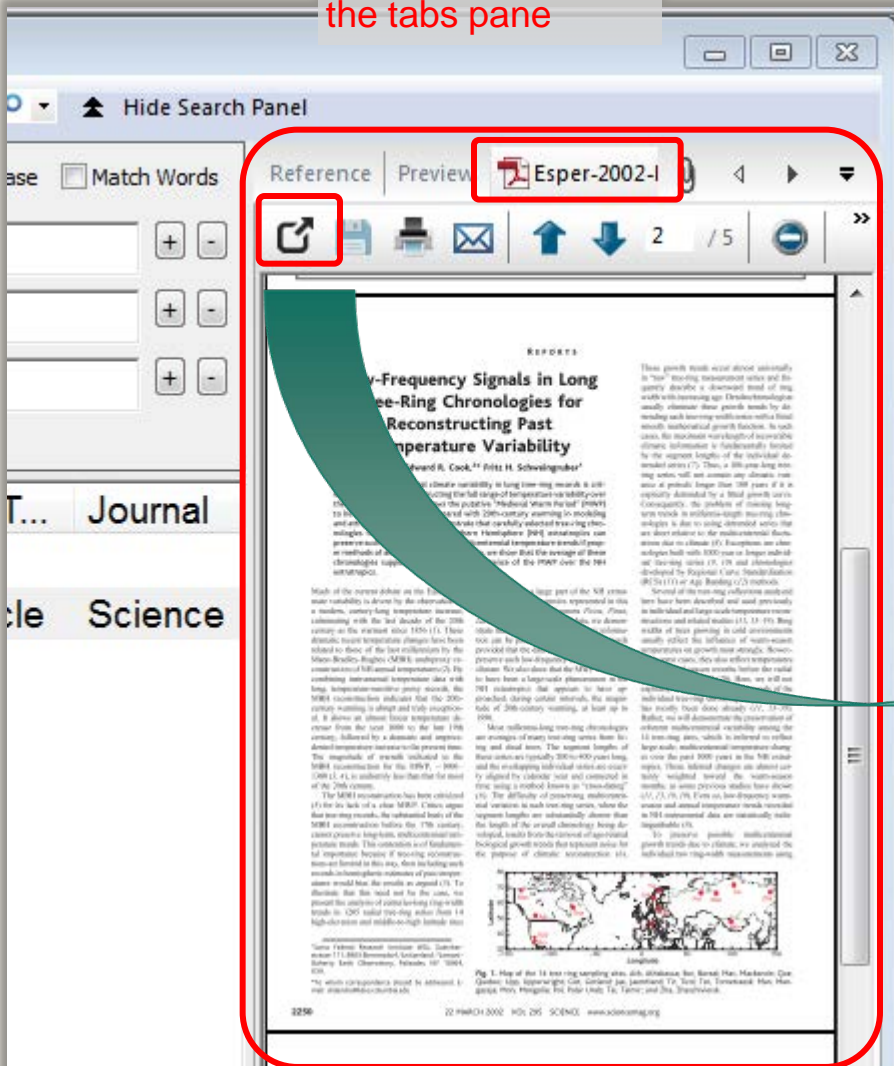
The screenshot displays the EndNote software interface. A callout box at the top left says "Select an Output Style" and points to a dropdown menu currently set to "Chicago 16th Author-Date". Another callout box at the top right says "...and get a glimpse on the effect of the selected <output style> via the preview pane" and points to a preview pane on the right. The preview pane shows a citation: "Esper, J., E. R. Cook, and F. H. Schweingruber. 2002. 'Low-frequency signals in long tree-ring chronologies for reconstructing past temperature variability.' *Science* 295 (5563):2250-2253. doi: 10.1126/science.1066208." Below the search area is a table of search results:

Author	Year	Title	Reference T...
Einstein, A...	1963	The evolution...	Book
Esper, J.; ...	2002	Low-frequen...	Journal Article

# The Graphical User Interface – PDF Viewer

...quick view via the tabs pane

...read and annotate in a separate window



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  - Share library as a compressed library or via servers
- With EN Online Account (55)
  - Sync between your devices
  - Share entire library ( $\geq$  EN X7.2)
  - Share groups (EN Online only)

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- Support, Forum, FAQ, Blogs, Community, ... (65)

# Collect Metadata – EN's Built-in Online Search & Connection Files

EndNote X7 interface showing the **Edit** menu and the **Connection Files** sub-menu. The **Open Connection Manager...** option is highlighted. A red box highlights the **Edit** menu, and another red box highlights the **Connection Files** sub-menu. A green arrow points from the **Open Connection Manager...** option to the **EndNote Connection Files** window.

EndNote Connection Files window showing a list of information providers. The **NEBIS** entry is selected and highlighted. A red box highlights the **NEBIS** entry, and another red box highlights the **Get More on the Web...** button. A green arrow points from the **Get More on the Web...** button to the **EndNote Connection Files** website.

EndNote Connection Files website showing a search for **NEBIS**. The **NEBIS (Switz.)** entry is highlighted, and the **DOWNLOAD** button is visible. A red box highlights the **NEBIS (Switz.)** entry and the **DOWNLOAD** button.

Via the Connection Manager, database connections need to be activated

Certain connection files (eg NEBIS) need to be downloaded from the web and installed via double-click, then File > Save as...

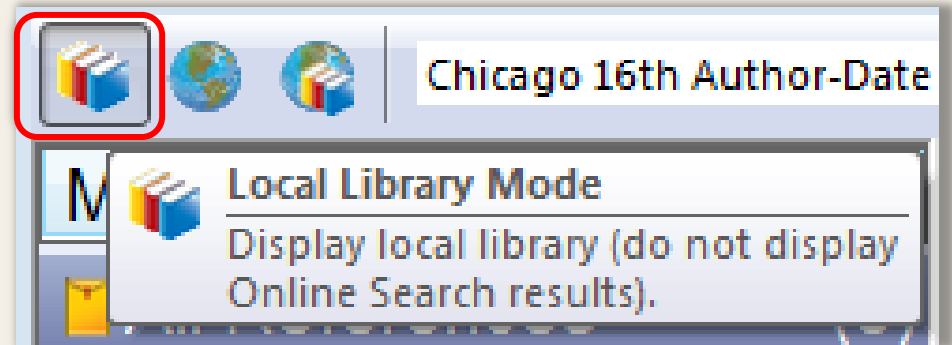
- ↪ By default, PubMed & Web of Science are activated
- ↪ A NEBIS connection file is available
- ↪ Scopus is NOT supported



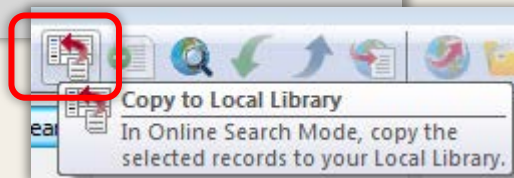
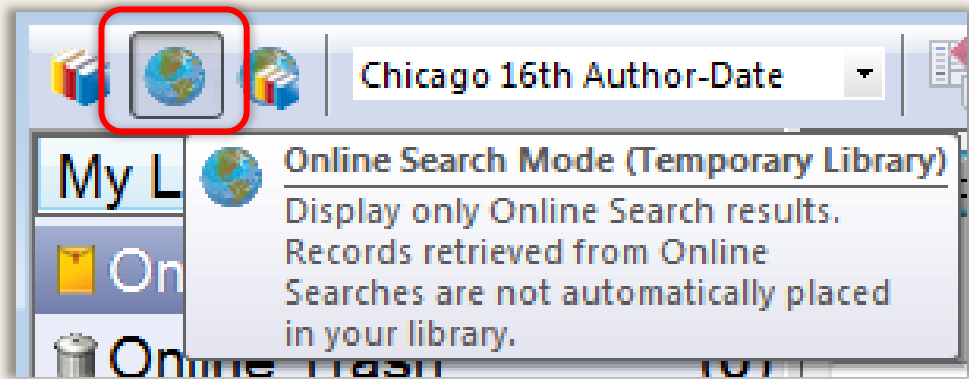
# Collect Metadata – Endnote's Library & Search Modes

## The 3 modes of Endnote

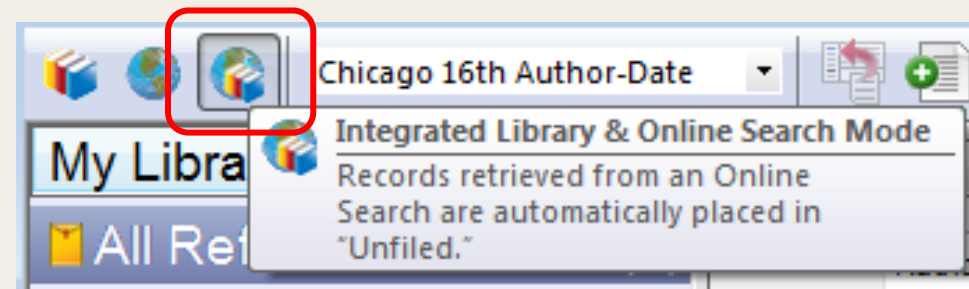
**Local Library Mode:**  
Online Search not available



**Online Search Mode:**  
Local library not available; selected search hits need to be transferred to local library



**Integrated Library & Online Search Mode (default):**  
All search hits are automatically transferred to local library



# Collect Metadata – Endnote's Online Search (NEBIS)

1. Switch to Online Search Mode

2. Choose NEBIS

3. Submit Your Search Query

4. Select Reference

Search Remote Library:  Match Case  Match Words

Author	Year	Title	Reference T...	Journal
Freedma...	1978	Statistics	Book	
Freedma...	1991	Statistics	Book	
Freedma...	1998	Statistics	Book	
Freedma...	2007	Statistics	Book	
Freedma...	1980	Statistics	Book	
Freedma...	1997	Statistics	Book	

Reference Type: Book

**Author**  
Freedman, David A.  
Pisani, Robert  
Purves, Roger

**Year**  
2007

**Title**  
Statistics

**Place Published**  
New York

**Publisher**  
W.W. Norton & Company

5. Copy Selection to Local Library

Chicago 16th Author-Date

My Library

- Online References
- Online Trash
- Online Search
  - NEBIS

6. Switch back to Integrated Library and Online Search Mode

Training Library

My Library

- All References (3)
- Copied References (1)
- Search Results (1)
- Sync Status...
- Unfiled (1)
- Trash (0)
- My Groups
  - Literature Manager
  - Just something ... (2)

Search

Author	Year	Title
Einstein, A...	1963	The evolution..
Esper, J.; ...	2002	Low frequen...
Freedma...	2007	Statistics

...et voilà

# Collect Metadata – Endnote's Online Search (Web of Science)

1. Switch to Online Search Mode

2. Choose Web of Science

3. Submit Your Search Query

4. Select Reference

Author	Year	Title	Reference Type	Journal
Milne, W. I.; Teo, ...	2004	Carbon nan...	Journal Article	Journal ..

Reference Type: Journal Article

**Author**  
Milne, W. I.  
Teo, K. B. K.  
Amaratunga, G. A. J.  
Legagneux, P.  
Gangloff, L.  
Schnell, J. P.  
Semet, V.  
Binh, V. T.  
Groening, O.

**Year**  
2004

**Title**  
Carbon nanotubes as field emission sources

5. Copy Selection to Local Library

6. Switch back to Integrated Library and Online Search Mode

...et voilà

Author	Year	Title
Einstein, Albert; In...	1963	The
Esper, J.; Cook, E...	2002	Low-
Freedman, Davi	2007	Stati
Milne, W. I.; Teo, ...	2004	Cart

# Collect Metadata – Endnote’s Built-in Online Search

- EN’s built-in Online Search is a **handy tool to quickly get metadata**, particularly for articles from the **Web of Science Core Collection**
- Other databases are readily accessible via EN’s <Connection Files>

- ↪ Tip: Always switch to EN’s <Online Search Mode> before starting an online search and manually transfer selected references to the local library
- ↪ Remember: In <Integrated Library & Search Mode> EN will automatically transfer all references (even unwanted ones) that subsequently would need to be deleted!

# Collect Metadata – External Database Search & Import (Scopus)

The screenshot shows the Scopus search results page for the query: (TITLE-ABS-KEY ( ozone ) AND TITLE-ABS-KEY ( wastewater OR "waste water" )). The results are sorted by 'Cited by' and show 3,520 document results. The top three results are highlighted as 'Top 3 cited' with their citation counts: 890, 839, and 806. The 'Export' button is highlighted, and a modal window is open for selecting the export format and information. The 'RIS Format' option is selected, and the 'Citations and abstract information' option is chosen in the dropdown menu. The 'Export' button at the bottom of the modal is also highlighted.

**Search query:** (TITLE-ABS-KEY ( ozone ) AND TITLE-ABS-KEY ( wastewater OR "waste water" ))

**3,520 document results** | Sort on: Date | **Cited by** | Relevance

**Top 3 cited**

Document	Cited by
1 Degradation of chlorophenols by means of advanced oxidation processes: A general review	890
2 Removal of chlorophenols by means of advanced oxidation processes: A general review	839
3 A review of chlorophenols by means of advanced oxidation processes	806

**Select & export eg the top 3 cited references**

**Choose your default reference manager or file type:**

- RIS Format** (EN) EndNote, Reference Manager
- CSV Excel
- BibTeX
- Text ASCII in HTML

**Select Endnote export format**

**Choose the information to export:**

Choose the information you want to export to the reference manager or file.

- 
- Include abstract**
- 
- 
- 

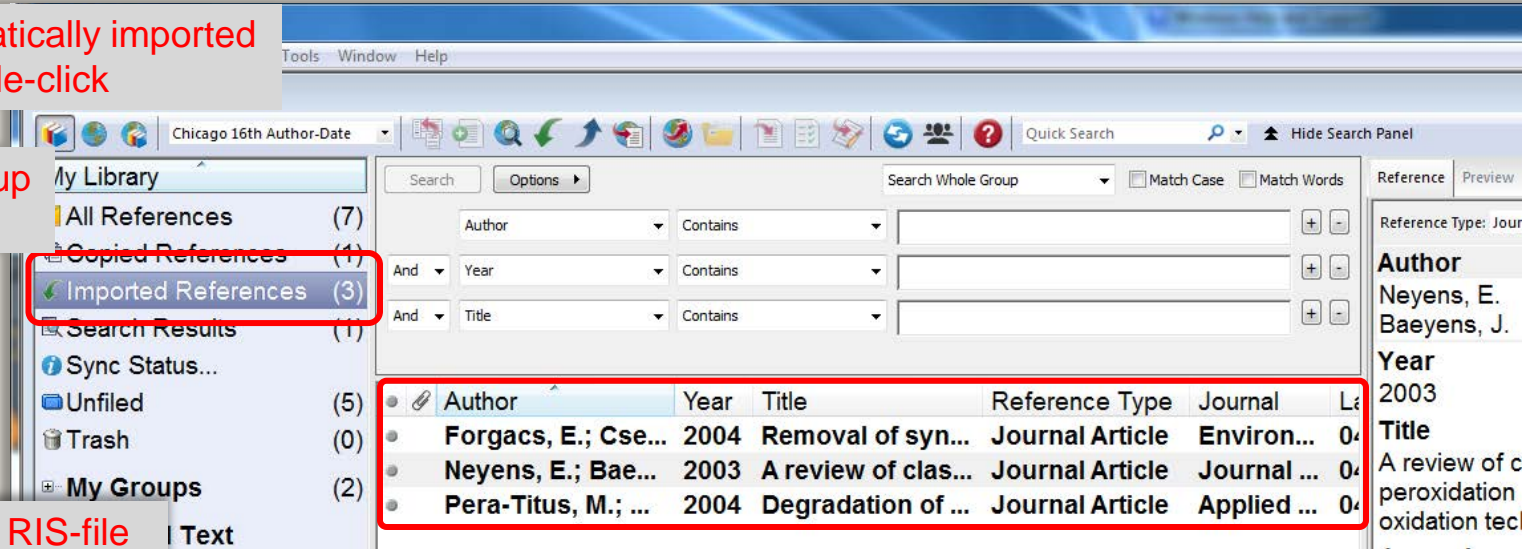
**Export**

**Export to Endnote readable RIS file**

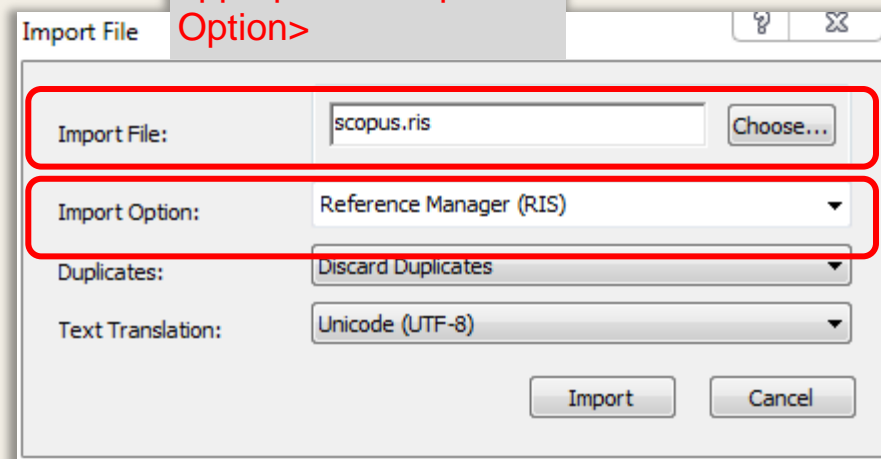
# Collect Metadata – External Database Search & Import (Scopus)

RIS-files can be automatically imported into the library via double-click

Note the temporary group <Imported References>



Or import the RIS-file manually via “File > Import > File” and the appropriate <Import Option>



Tip: Other database specific import options/filters (eg Web of Science) can be found and activated via “Edit > Import Filters > Open Filter Manager”

# Collect Metadata – External Search & Import (Google Scholar)



Clifford Complexation of Constrained Ligands Piperazine



Scholar

About 292 results (0.07 sec)

## Complexation of constrained ligands piperazine, N-substituted and thiomorpholine

SE Clifford, V Tiwow, A Gendron, M Maeder... - Australian journal of chemistry, 2009  
Abstract **Complexation** of the symmetric cyclic diamine **piperazine** (1, 4-dimethylpiperazine) and thiomorpholine have been examined in dry dimethyl formamide by spectrophotometric titrations to define formation constants, and by stopped flow kinetics to define the ...  
Cited by 2 Related articles All 4 versions **Cite** Save More

Cite

### Cite

Copy and paste a formatted citation or use one of the links to import into a bibliography manager.

MLA Clifford, Sarah E., et al. "Complexation of constrained ligands piperazine, N-substituted piperazines, and thiomorpholine." *Australian journal of chemistry* 62.10 (2009): 1196-1206.

APA Clifford, S. E., Tiwow, V., Gendron, A., Maeder, M., Rossignoli, M., Lawrance, G. A., ... & Schroeder, M. (2009). Complexation of constrained ligands piperazine, N-substituted piperazines, and thiomorpholine. *Australian journal of chemistry*, 62(10), 1196-1206.

Chicago Clifford, Sarah E., Vanny Tiwow, Aleasia Gendron, Marcel Maeder, Monica Rossignoli, Geoffrey A. Lawrance, Peter Turner, Alexander J. Blake, and Martin Schroeder. "Complexation of constrained ligands piperazine, N-substituted piperazines, and thiomorpholine." *Australian journal of chemistry* 62, no. 10 (2009): 1196-1206.



EndNote

RefMan

RefWorks



ENW-files can be automatically imported into EN's library via double-click

Save As

Neuhold, Bobby | Downloads

File name: scholar.enw

Save as type: EndNote Import File

Save Cancel

# Collect Metadata – External Catalogue Search & Import (NEBIS)

The screenshot shows the NEBIS search interface. At the top, there is a navigation bar with the NEBIS logo, 'New Search', 'NEBIS Libraries', 'Help', 'Other Catalogs', and 'Language: English'. A user is logged in as 'Guest' with 'e-Shelf' checked and a 'Sign in' link. The search bar contains the text 'Schwarzenbach Environmental Orga' and a 'Search' button. Below the search bar are filters for 'All items', 'containing my search terms', and 'anywhere'. The search results show a list of authors: René P. Schwarzenbach, Philip M. Gschwend, and Dieter M. Imboden. The 'Details' tab is selected, showing the title 'Environmental organic chemistry' and additional information. An 'Actions' menu is open, with 'Export RIS' highlighted by a red box.

Guest  e-Shelf Sign in

New Search | NEBIS Libraries | Help | Other Catalogs | Language: English

Schwarzenbach Environmental Orga x NEBIS network catalogue Search Advanced Search

All items | containing my search terms | anywhere

**Environmental organic chemistry**  
René P. Schwarzenbach, Chemist, Switzerland, 1945 -; Philip M. Gschwend;  
Dieter M. Imboden, Physicist, Limnologist, Switzerland, 1943 -  
2003

Locations & Request **Details**

**Title:** Environmental organic chemistry  
**Additional Title Information:** Rene P. Schwarzenbach,  
Philip M. Gschwend, Dieter M. Imboden  
**Place, Publisher:** Hoboken, New Jersey : Wiley-  
Interscience  
**Creation Date:** 2003  
**Edition:** 2nd ed.

Actions

- Add to e-Shelf
- E-mail
- Print
- Permalink
- Citation
- EndNote Web
- Delicious
- Export RIS

Tip: Importing the RIS-file from NEBIS into Endnote swaps the order of author's first and last names

Export RIS-file and import via double-click



# Collect Metadata – External Catalogue Search & Import (Publisher)

Springer Handbook of Mechanical Engineering

2009, pp 1149-1266

## Construction Machinery

Eugeniusz Budny Prof., Mirosław Chłosta Dr., Henning Jürgen Meyer Prof.,  
Mirosław J. Skibniewski Prof.



Download PDF (5,540 KB)



View Printer Friendly Version

### Abstract

In this chapter the most common classes of machinery found on construction



Look Inside

#### Other actions

- » Reprints and Permissions
- » Export citation
- » About this Reference Work
- » Add to Papers

Book chapter

Tip: Citations for book chapters are often best obtained via the publisher's website

Select Download

- » ProCite (RIS)
- » Reference Manager (RIS)
- » Ref Works (RIS)
- » BookEnds (RIS)
- » EndNote (RIS)
- » PubMed (TXT)
- » Text only (TXT)
- » BibTeX (BIB)

Export Endnote-file and import via double-click

# Collect Metadata – Extract Metadata from PDFs

Double-check EN's PDF filename settings via Edit > Preferences > PDF Handling

EndNote Preferences

Change Case  
Display Fields  
Display Fonts  
Duplicates  
Find Full Text  
Folder Locations  
Formatting  
Libraries  
**PDF Handling**  
Read / Unread  
Reference Types  
Sorting  
Spell Check  
Sync  
Temporary Citations

PDF Auto Renaming Options

Don't Rename  
 Author + Year + Title  
 Author + Title  
 Author + Year  
 Title  
 Custom

Note: Filenames may be up to 50 characters long.

Existing PDF-files (incl. its metadata) can be imported via File > Import > File

Import File: Esper\_2002.pdf Choose...

Import Option: PDF

Duplicates: Discard Duplicates

Text Translation: Unicode (UTF-8)

Import Cancel

- Tip: PDF-file renaming can also be done later, even as a batch, via References > File Attachments > Rename PDFs
- Tip: DOI needs to be present to allow for the extraction of metadata from PDFs

Existing PDF annotations are kept during import

Reference Preview Esper-2002

Reference Type: Journal Article

Author  
Esper, J.  
Cook, E. R.  
Schweingruber, F.

Year  
2002

Title  
Low-frequency signals in long tree-ring chronologies for reconstructing past temperature variability

Journal  
Science

Volume  
295

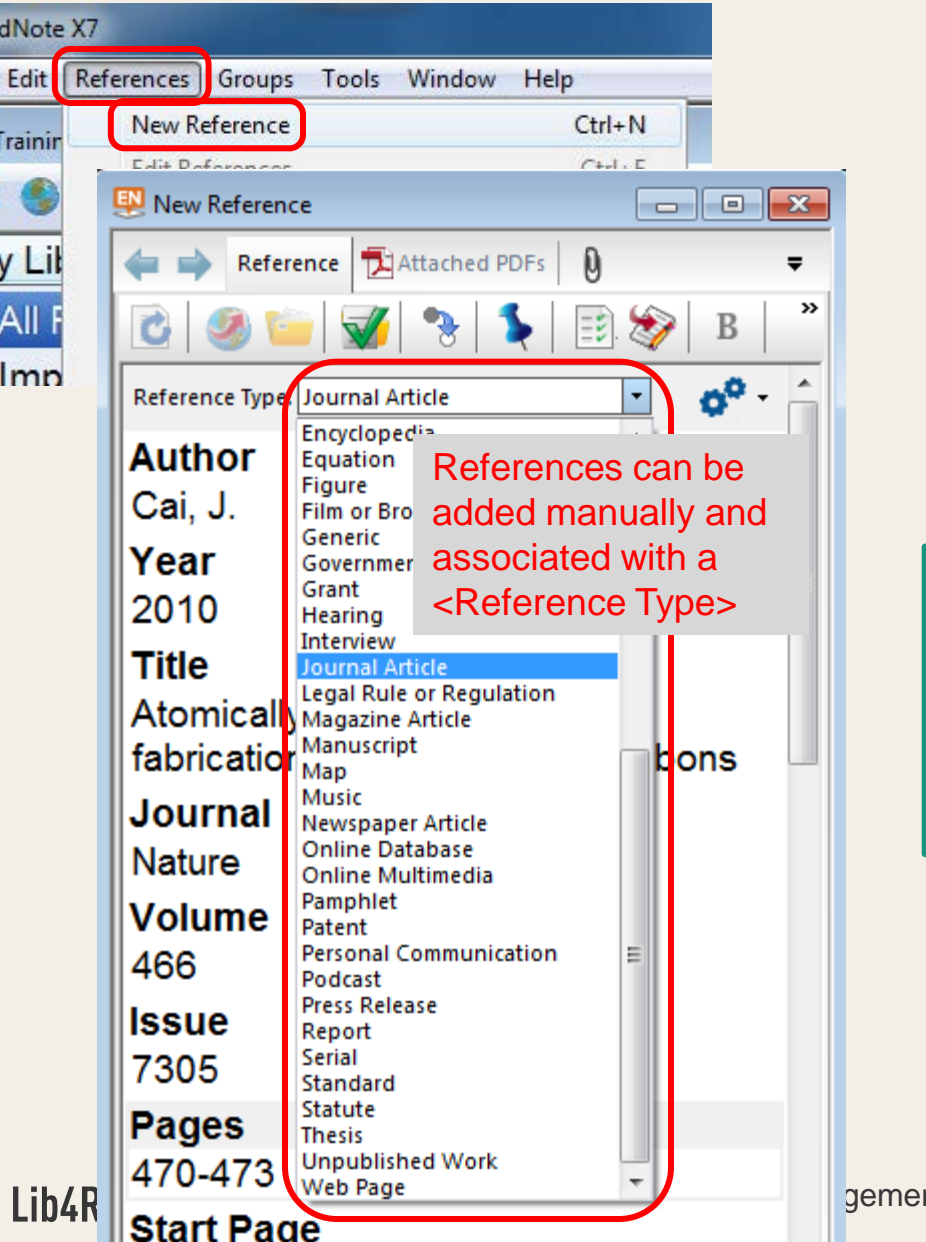
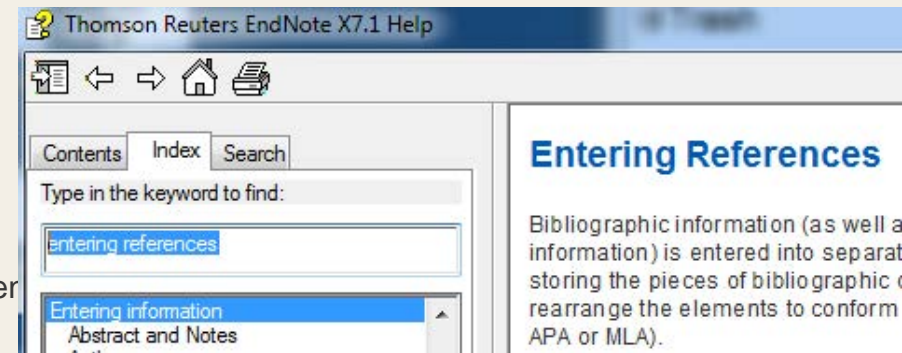
Issue  
5563

Pages  
2250-2253

# Collect Metadata – Manual Addition of references

- For the manual addition of references **you need to obey a certain syntax and rules** regarding the input of the metadata into the respective fields
- Most of the rules are pretty straightforward and their effect (for a given output style) can be seen in the preview tab

- ↳ Tip: Compare your syntax with some already existing (imported) references of the same reference type
- ↳ Tip: EN's built-in Help index (F1) gives advice on entering references manually



# Collect Metadata – Manual Alteration / Editing of references

EN Freedman, 2007 #1

Reference Att

**Title**  
Statistics

**Place Published**  
New York

**Publisher**  
W.W. Norton & Company

**Number of Pages**  
576 S.

Metadata as imported eg via NEBIS connection

Remove the unwanted German abbrev. "S." for pages

Double-Click on the reference to be edited



Edited metadata

EN Freedman, zu07 #1

Reference Att

**Title**  
Statistics

**Place Published**  
New York

**Publisher**  
W.W. Norton & Company

**Number of Pages**  
576

Layout

Freihandbereich

**Keywords**  
Mathematical statistics  
Statistik  
Lehrbuch

You might want to add your own keywords

(Bern) Freihandbereich

**Keywords**  
Intuitive Book  
Basic Statistics  
Mathematical statistics  
Statistik  
Lehrbuch

Tip: Always check imported metadata for correctness & suitable field syntax.

# Find & Attach Fulltext PDFs

EndNote Preferences

Double-check EN's <Find Full Text> settings via Edit > Preferences > Find Full Text

- Change Case
- Display Fields
- Display Fonts
- Duplicates
- Find Full Text**
- Folder Locations
- Formatting
- Libraries
- PDF Handling
- Read / Unread
- Reference Types
- Sorting
- Spell Check
- Sync
- Temporary Citations
- Term Lists
- URLs & Links

The Find Full Text feature uses several technologies to maximize the chances that EndNote will find all available PDFs. Use this screen to control these full text search options:

- Web of Science Full Text Links
- DOI (Digital Object Identifier)
- PubMed LinkOut (U.S. National Library of Medicine)
- OpenURL

OpenURL Path:  Lib4RI's Link Resolver can also assist to find full text

Authenticate with:

URL:

Examples: <https://login.ezproxy.library.myuniversity.edu/login>  
<http://auth.universityname.edu/authentication>

Automatically invoke Find Full Text on newly-imported references



# Find & Attach Fulltext PDFs – Guided via Lib4RI's Link Resolver

Training Library.enl

Chicago 16th Author-Date

My Library	Author	Year
All References (11)	Clifford, Sarah ...	2009
	Freedman David...	2007
	ch, ...	2003

Right Click a reference and goto URL > OpenURL Link

For those <Not Found>, Lib4RI's link resolver may provide help to get to the full text

Found PDF (7)

Not found (3)

Link Resolver

Lib4RI

Title: Complexation of constrained ligands piperazine, N-substituted piper... thiomorpholine

Source: Australian journal of chemistry [0004-9425] Clifford yr:2009 vol:62 is... pg:1196 -1206

Full text

This title is not subscribed or the volume is not part of the licensing period. Please order a copy via NEBIS or via our Document Delivery Service below.

Further options to get it

Google Scholar - Search with the Article Title

NEBIS - Check availability in the library catalogue to order a copy

Document De

Eg, file a NEBIS copy request to get a PDF-scan of the article as it is not part of our licensing

How Search Panel

Reference review Clifford-20... of constrai...

Issue 10

Pages 1196-1206

ISSN 1445-0038

File Attachments

Clifford-20... of constrai...

...and for manual attachment, drag'n drop the PDF into the reference tab pane of the corresponding reference

... or search for the PDF yourself...

...and for manual attachment, drag'n drop the PDF into the reference tab pane of the corresponding reference

# Introduction to Endnote X7

## EN's GUI

- Create a new library (10)
- Graphical User Interface (11)

## Collect

- Endnote's built-in online search (16)
- Export / import after an external database search (21)
- Import metadata from PDFs (26)
- Manually adding & altering references (27)
- Find & attach full text PDFs (29)

## Organise

- Building groups (33)
- Checking & Updating references (34)
- Finding duplicates (35)
- Searching references (incl. PDFs & annotations) (36)
- Backing up your library (37)

## Cite

- Bibliographic output styles (39)
- Cite-while-you-write (MS Word) (44)
- Using journal abbreviations (48)

## Share & Sync

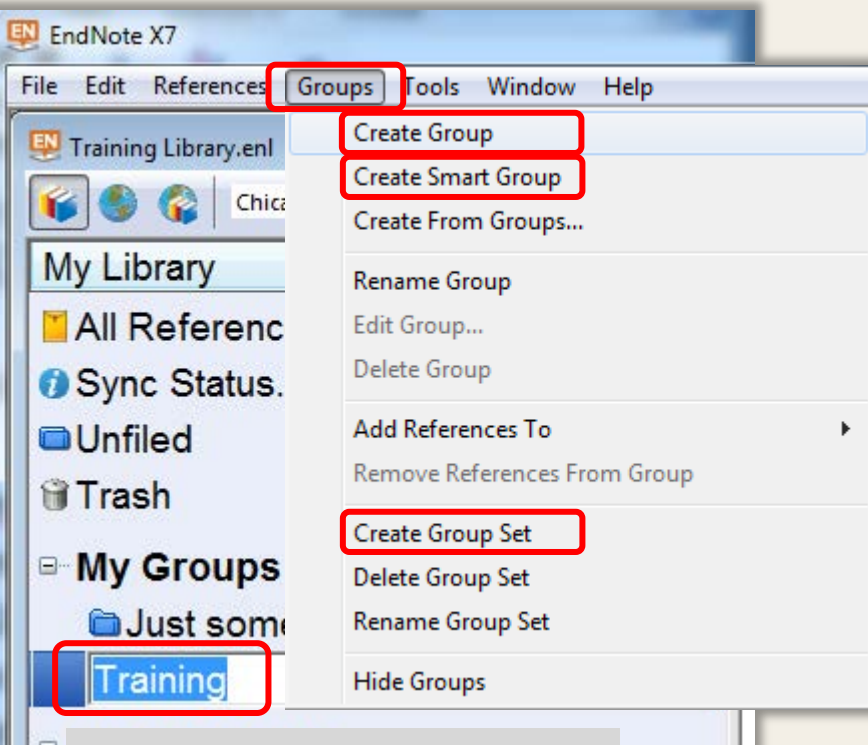
- Without EN Online Account (52)
  - Share references via E-mail
  - Share travel library via Word plugin
  - Share library as a compressed library or via servers
- With EN Online Account (55)
  - Sync between your devices
  - Share entire library ( $\geq$  EN X7.2)
  - Share groups (EN Online only)

## Concluding Info, Help & Useful Links

- Endnote can do more (60)
- Is Endnote the right thing for me (61)
- User Guides & Tutorials (63)
- Support, Forum, FAQ, Blogs, Community, ... (65)

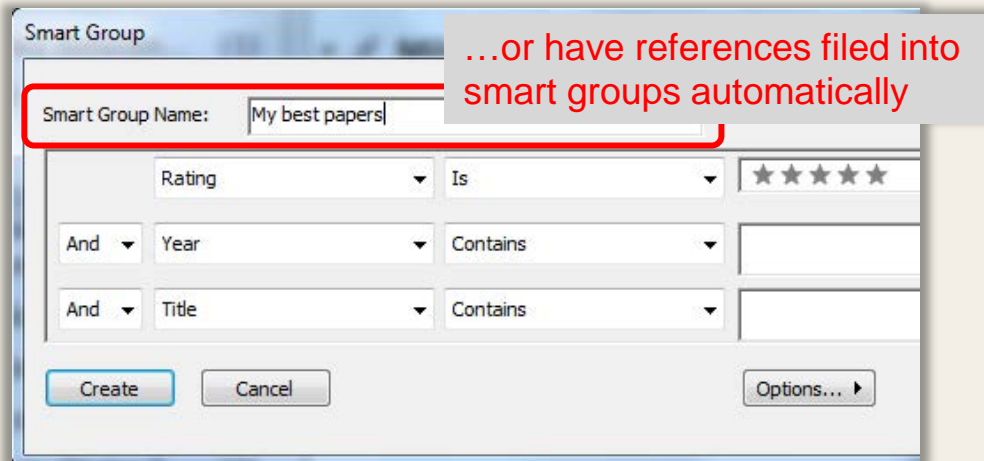


# Organising your Library – Grouping References

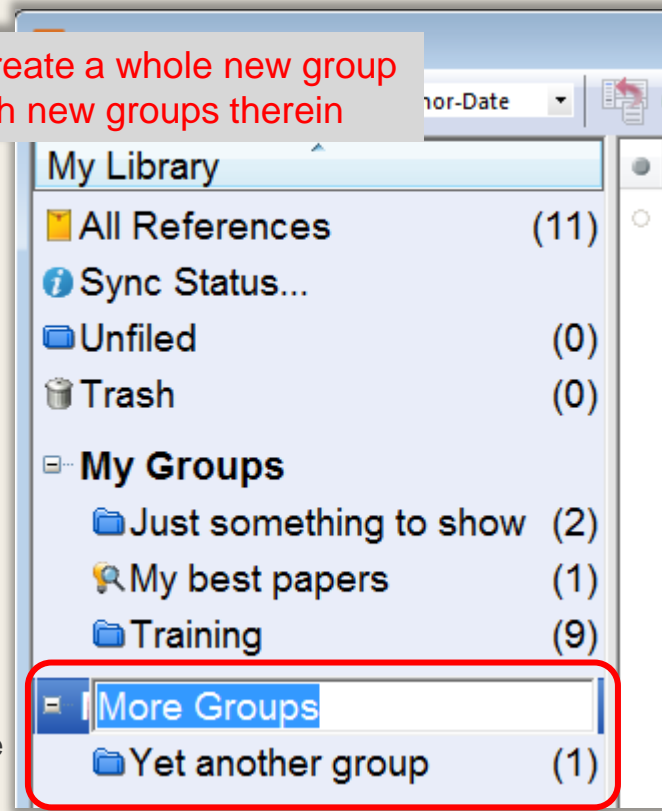


Create groups and drag'n drop <Unfiled> references in there

- Tip: Work with one library only and rather assign references to groups suiting your different purposes (eg your different papers, theses, ...)
- Tip: One reference can be a member of multiple groups (no duplicates are created)



...or create a whole new group set with new groups therein



# Organising your Library – Checking & Updating References

Highlight one or more references in your library and try to find available updates via References > Find Reference Updates

Reference Type: Book

**Author**  
Freedman, David A.  
Pisani, Robert  
Purves, Roger

**Year**  
2007

**Title**  
Statistics

**Place Published**  
New York

**Publisher**  
W.W. Norton & Company

**Number of Pages**  
576 S.

**Edition**

Check references for “obvious” typos or issues, eg, NEBIS often exports into the field for <page numbers> the German abbreviation “S.” for pages

**Available Updates**

Alternate Journal  
Aust J Chem  
ISSN  
0004-9425  
DOI  
Doi 10.1071/Ch09313  
Original Publication  
Reprint Edition

Reference Type: Journal Article

**My Reference**

Alternate Journal  
ISSN  
1445-0038  
DOI  
Original Publication  
Reprint Edition

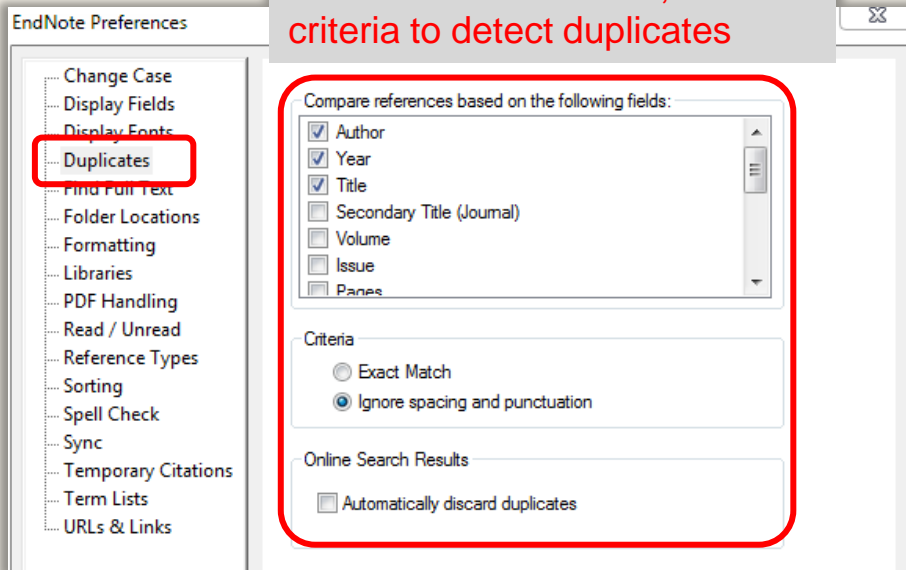
Update All Fields ->  
Update Empty Fields ->

Save Updates Skip

- ↳ Tip: If you don't want to update all or empty fields only, you can also just copy / paste individual fields. Don't forget to save your updates.
- ↳ This tool is particularly handy for updating manually & incomplete input references

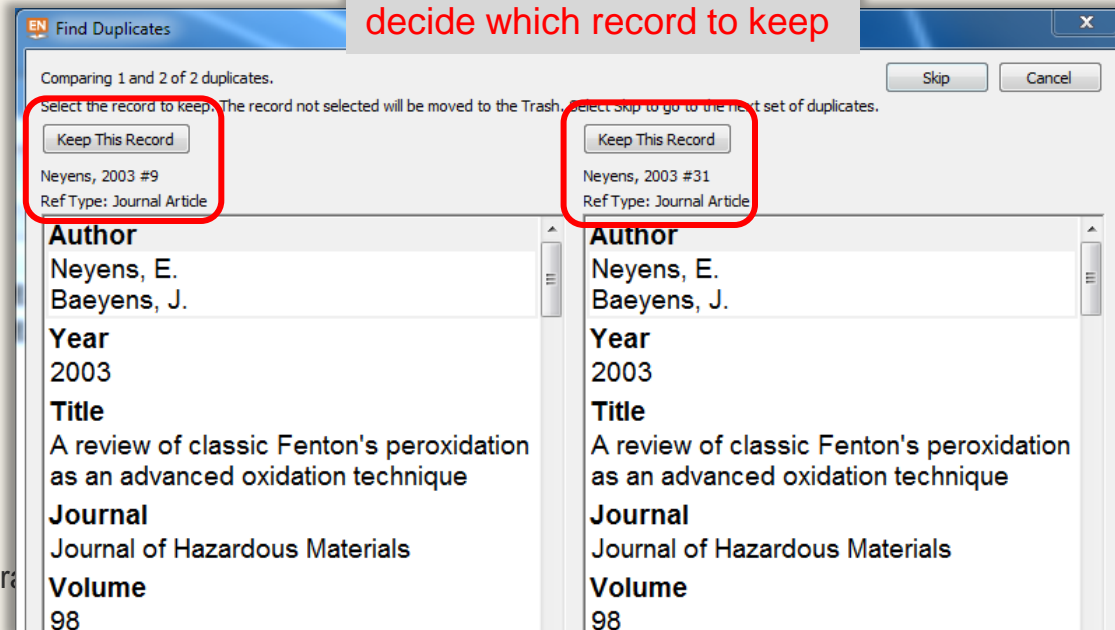
# Organising your Library – Finding Duplicates

Via Edit > Preferences, set the criteria to detect duplicates



Tip: Endnote assigns unique and increasing record numbers (below, #9 and #31) to all references. This can become handy to quickly identify a “later” duplicate from an “early” original without having to double-check all fields.

For all found duplicates, decide which record to keep



# Organising your Library – Searching Your Library

The advanced search box allows to search for Boolean combinations of various fields, such as author, year, title, keywords, etc

Quick Search is often sufficient. Phrase search (" ") and wildcards (\*) can be used. PDFs are searched as well!

The screenshot displays the Endnote software interface. On the left is a sidebar with 'My Library' containing 'All References (11)', 'Sync Status...', 'Unfiled (0)', 'Trash (0)', 'My Groups' (including 'Just somethin... (1)', 'My best papers (1)', 'Training (10)'), 'More Groups' (including 'Yet another g... (1)'), and 'Find Full Text'. The main window shows a search interface with a search bar containing 'multicentennial climate v' and a search button. Below the search bar is a table of search results:

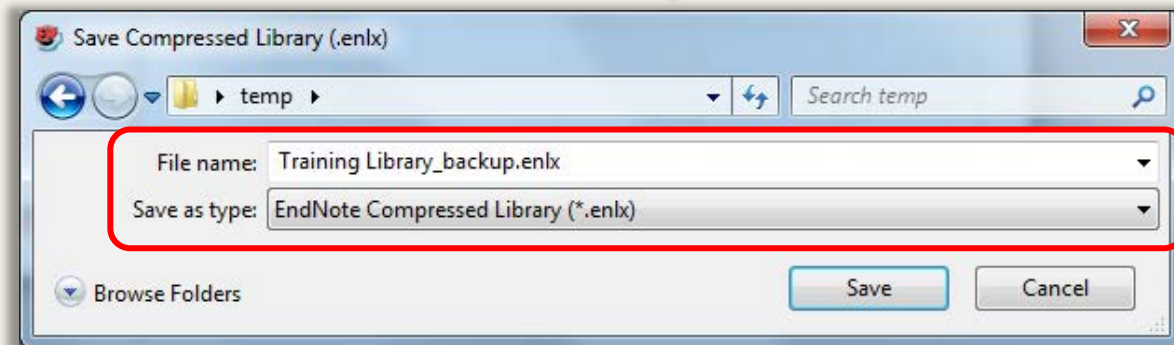
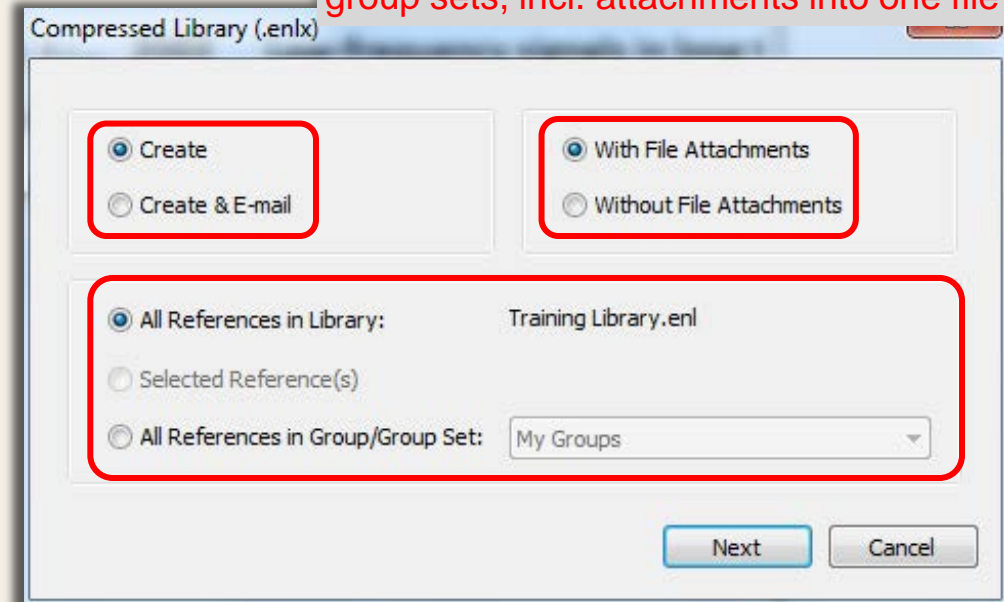
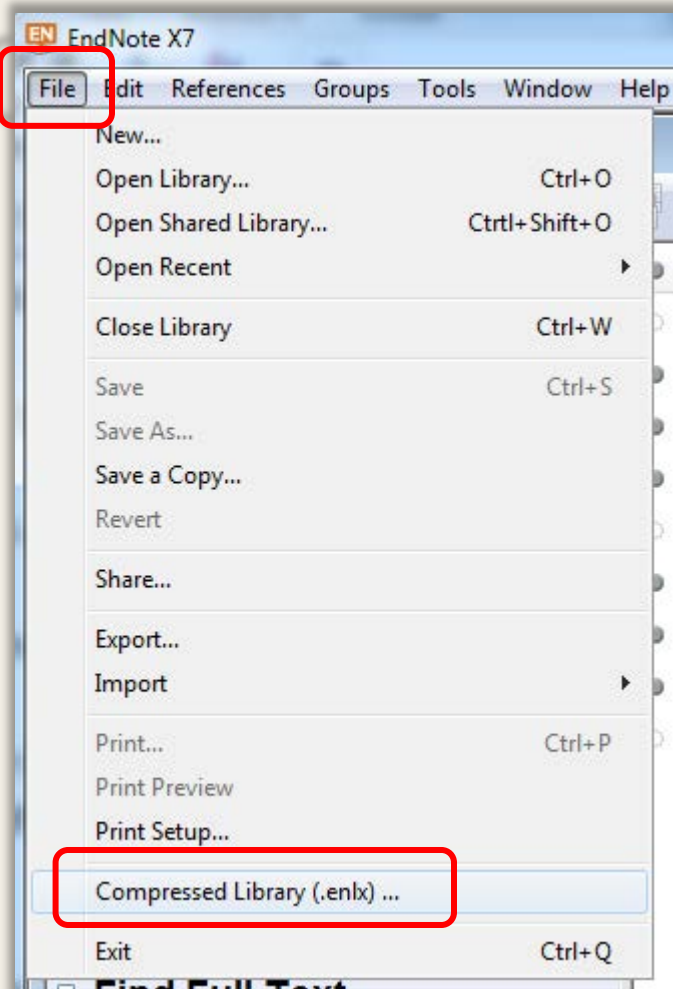
Author	Year	Title	Reference Type	Journal
Esper, J.; Cook, ...	2002	Low-frequency si...	Journal Article	Science

Below the table, a preview of a reference is shown. The title is 'Low-Frequency Significance of Tree-Ring Chronologies for Reconstructing Temperature Variability'. The authors are 'Jan Esper,<sup>1</sup> Edward R. Cook,<sup>2\*</sup> Frit...' and the abstract begins with 'reserving multicentennial climate variability is naturally important for reconstructing the full range of the past 1000 years. This allows the putative "N... to be described and to be compared with 20th-century attribution studies. We demonstrate that calibrations from 14 sites in the Northern Hemisphere preserve such coherent large-scale, multicentennial...'.

Tip: Imported references often have the fields <Keywords> already populated. You might even consider adding your own keywords to references as they are all searchable.

# Organising your Library – Backup

Archive the whole library or just groups or group sets, incl. attachments into one file



Tip: When compressed ENLX-files are re-opened, EN regenerates the original \*.ENL file and \*.DATA folder

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## Cite

- Bibliographic output styles (39)
- Cite-while-you-write (MS Word) (44)
- Using journal abbreviations (48)

## Share & Sync

- Without EN Online Account (52)
  - Share references via E-mail
  - Share travel library via Word plugin
  - Share library as a compressed library or via servers
- With EN Online Account (55)
  - Sync between your devices
  - Share entire library ( $\geq$  EN X7.2)
  - Share groups (EN Online only)

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# Cite – Bibliographic Output Styles

- Output styles determine how references will be formatted and displayed in your bibliography or in your text document
- EN's <Style Manager> provides > 5000 styles (incl. demands for most journals)

The screenshot shows the 'EndNote Styles' dialog box. On the left, a list of styles is shown with checkboxes: 'Harmful Algae', 'Harvard', 'Harvard (NUIG)', and 'Harvard Int J Press-Politics'. The 'Harvard (NUIG)' style is selected. A red box highlights this row. A red text box above the list says 'Select your favourite styles so they will be accessible EN's main menu'. On the right, a 'Category' list shows 'Biology', 'Science', 'Science', and 'Political Science'. Below the list are buttons: 'Get More on the Web...', 'Mark All', 'Unmark All', 'Find by', 'Style Info/Preview', and 'Edit'. The 'Style Info/Preview' and 'Edit' buttons are highlighted with red boxes. A large red 'Preview' watermark is overlaid on the bottom right of the screenshot. Below the buttons, a preview of a bibliography is shown with three entries.

Via EN's Style Manger (Edit > Output Styles > Style Manager) you can

- Select favourite styles & preview
- Get more styles
- Edit Styles

Select your favourite styles so they will be accessible EN's main menu

Get More on the Web... Mark All Unmark All Find by

Style Info/Preview Edit

Less Info:

Billoski, T. V. (1992) *Introduction to Paleontology*, 6th ed., New York: Institutional Press.

Morehouse, S. I. and Tung, R. S. (1993) Statistical evidence for early extinction of reptiles due to the K/T event. *Journal of Paleontology*, 17(2), pp. 198-209.

Schwartz, M. T. and Billoski, T. V. (1990) Greenhouse hypothesis: effect on dinosaur extinction. in Jones, B. T. and Lovecraft, N. V., (eds.) *Extinction*. New York: Barnes and Ellis. pp. 175-189.

# Cite – Bibliographic Output Styles

- With EN's <Style Editor> you can make many style adjustments effecting layout & formatting of all <reference types> (eg book, journal article, etc)

↪ Tip: EN's style editor is **very powerful and can require a fair bit of training** to get used to the **rules and special characters** that effect the formatting of your citations/bibliography.

↪ Tip: If you want to create/alter a style

↪ Using EN's style manager, **find & select the one closest** to your liking and open it with EN's style editor

↪ **Save the style under a different name** and tag it in the style manager as a favourite

↪ Select the style in EN's main menu

↪ **Make changes to the style according to EN's help (F1) and observe the effects** for a selected reference in the preview pane of EN's main window (after saving)

↪ **Very well hidden on EN's website: EN's full manual on the style editor**

<http://kbportal.thomson.com/utility/getfile.aspx?rid=6422> (Windows)

<http://kbportal.thomson.com/utility/getfile.aspx?rid=6421> (Mac)



# Cite – Bibliographic Output Styles

The screenshot displays the EndNote interface for the 'Harvard (NUIG) Copy' style. The 'Page Numbers' option is selected under 'Page Number Format'. A red box highlights the 'Page Numbers' option in the left-hand navigation pane. Another red box highlights the 'Abbreviate the last page number (e.g. 123-5)' option in the 'Page Number Format' section. A third red box highlights the 'Preview' button in the top right of the citation preview window. A fourth red box highlights the page number range '1196-206.' in the citation preview. A red text box with a white background is overlaid on the image, stating: 'Small changes such as the display of page number are rather straightforward.'

Harvard (NUIG) Copy

Plain Font Plain Size B I U P A<sup>1</sup> A<sub>1</sub> Σ A<sub>BC</sub>

About this Style  
Punctuation  
Anonymous Works  
**Page Numbers**  
Journal Names  
Sections  
Citations  
Templates  
Ambiguous Citations  
Author Lists  
Author Name  
Numbering  
Sort Order  
Bibliography  
Templates  
Field Substitutions  
Layout  
Sort Order  
Categories  
Author Lists

Page Number Format

Don't change page numbers  
 Show only the first page number (e.g. 123)  
 Abbreviate the last page number (e.g. 123-5)  
 Abbreviate the last page, keeping two digits (e.g. 123-125)  
 Show the full range of pages (e.g. 123-125)  
 Show only the first page for journals, full range for others

Harvard (NUIG) Copy

Options Search Whole Library

Contains  
Contains  
Contains

Reference Preview

Clifford, S. E., Tiwow, V., Gendron, A., Maeder, M., Rossignoli, M., Lawrance, G. A., Turner, P., Blake, A. J. and Schroeder, M. (2009) Complexation of constrained ligands piperazine, N-substituted piperazines, and thiomorpholine. *Australian journal of chemistry*, 62(10), pp. 1196-206.

Reference Type

- Budn... Book Section
- Cai, J... Journal Article
- Cliffo... Journal Article
- Einst... Book
- Espe... Journal Article

Showing 11 of 11 references.

Layout

# Cite – Bibliographic Output Styles

Harvard (NUIG) Copy

Plain Font Plain Size B I U P A<sup>1</sup> A<sub>1</sub> Σ A<sub>BC</sub> »

About this Style  
Punctuation  
Anonymous Works  
Page Numbers  
Journal Names  
Sections  
Citations  
Templates  
Ambiguous Citations  
Author Lists  
Author Name  
Numbering  
Sort Order  
Bibliography  
Templates  
Field Substitutions  
Layout  
Sort Order  
Categories  
Author Lists  
Author Name  
Editor Lists  
Editor Name  
Title Capitalization

Bibliography

Reference Types ▶ Insert Field ▶

Directed by | Director|.  
Place Published|:  
Distributor| Date  
Released| Running Time|  
[Medium]].

**Journal Article**  
Author (Year) Title. *Journal*,  
*Volume*|(Issue)|, pp.  
Pages|(DOI)|.

Magazine Article  
Author (Year) Title.  
*Magazine*, Date|, p.^pp.  
Pages|.

Map  
Cartographer (Year) Title,  
Scale|. Place Published|:  
Publisher|.

Newspaper Article

Others, such as the addition of the field <DOI> to the reference type <Journal Articles>, require a bit more knowhow (F1).

Training Library.enl

Harvard (NUIG) Copy

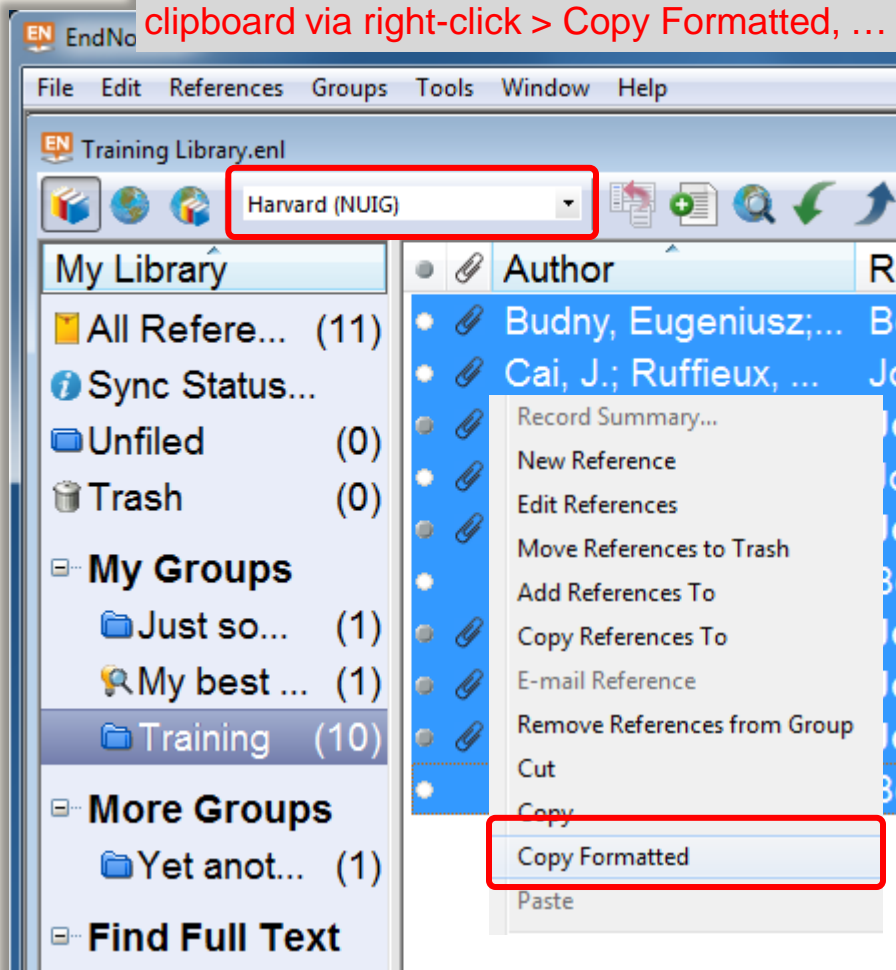
Author	Reference Type	Year
Budny, Eugeniusz;...	Book Section	20
Cai, J.; Ruffieux, ...	Journal Article	20
<b>Clifford, Sarah E...</b>	<b>Journal Article</b>	<b>20</b>
Einstein, Albert; In...	Book	19
Eser, J.; Cook, E...	Journal Article	20

Reference Preview Clifford-2009-Complexation of const

Clifford, S. E., Tiwow, V., Gendron, A., Maeder, M., Rossignoli, M., Lawrance, G. A., Turner, P., Blake, A. J. and Schroeder, M. (2009) Complexation of constrained ligands piperazine, N-substituted piperazines, and thiomorpholine. *Australian journal of chemistry*, 62(10), pp. 1196-206 (Doi 10.1071/Ch09313).

# Cite – Create a Quick Bibliography

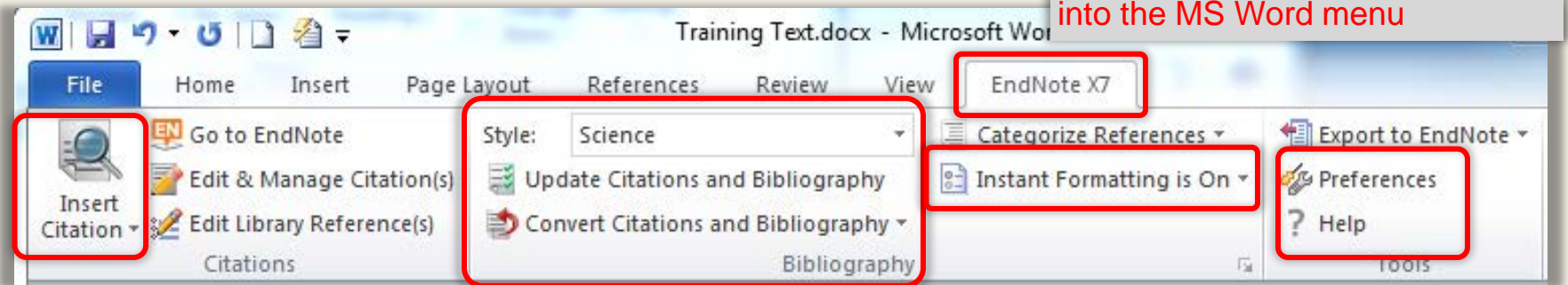
Using the current output style a bibliography with the selected references can be put into the clipboard via right-click > Copy Formatted, ...



...and can then be pasted with its formatting into a text document.

- Budny, E., Chłosta, M., Meyer, H. J. and Skibniewski, M. J. (2009) Construction Machinery. in Grote, K.-H. and Antonsson, E. K., (eds.) *Springer Handbook of Mechanical Engineering*. Springer Berlin Heidelberg. pp. 1149-1266.
- Cai, J., Ruffieux, P., Jaafar, R., Bieri, M., Braun, T., Blankenburg, S., Muoth, M., Seitsonen, A. P., Saleh, M., Feng, X., Mullen, K. and Fasel, R. (2010) Atomically precise bottom-up fabrication of graphene nanoribbons. *Nature*, 466(7305), pp. 470-473.
- Clifford, S. E., Tiwov, V., Gendron, A., Maeder, M., Rossignoli, M., Lawrence, G. A., Turner, P., Blake, A. J. and Schroeder, M. (2009) Complexation of constrained ligands piperazine, N-substituted piperazines, and thiomorpholine. *Australian journal of chemistry*, 62(10), pp. 1196-1206.
- Esper, J., Cook, E. R. and Schweingruber, F. H. (2002) Low-frequency signals in long tree-ring chronologies for reconstructing past temperature variability. *Science*, 295(5563), pp. 2250-3.
- Forgacs, E., Cserháti, T. and Oros, G. (2004) Removal of synthetic dyes from wastewaters: A review. *Environment International*, 30(7), pp. 953-971.
- Freedman, D. A., Pisani, R. and Purves, R. (2007) *Statistics*, 4th ed., New York: W.W. Norton & Company.
- Milne, W. I., Teo, K. B. K., Amaratunga, G. A. J., Legagneux, P., Gangloff, L., Schnell, J. P., Semet, V., Binh, V. T. and Groening, O. (2004) Carbon nanotubes as field emission sources. *Journal of Materials Chemistry*, 14(6), pp. 933-943.
- Neyens, E. and Baeyens, J. (2003) A review of classic Fenton's peroxidation as an advanced oxidation technique. *Journal of Hazardous Materials*, 98(1-3), pp. 33-50.
- Pera-Titus, M., García-Molina, V., Baños, M. A., Giménez, J. and Esplugas, S. (2004) Degradation of chlorophenols by means of advanced oxidation processes: A general review. *Applied Catalysis B: Environmental*, 47(4), pp. 219-256.
- Schwarzenbach, R. P., Gschwend, P. M. and Imboden, D. M. (2003) *Environmental organic chemistry*, 2nd ed., Hoboken, New Jersey: Wiley-Interscience.

# Cite-While-You-Write (MS Word Plugin)



- EN's Word plugin acts as an interface between EN and MS Word
- **Either use <Insert Citation>** from within the Word document or **drag'n drop selected citation(s) from EN** to the desired position in the document
- By default, EN activates <Instant Formatting>, ie citations and bibliography are automatically formatted ( or updated every 30sec) according to the selected <Style>

↩ Tip: Particularly if the document becomes rather large it is better to use the unformatted citations (via <Convert Citations and Bibliography>) and turn of <Instant Formatting> during the writing process.

# Cite-While-You-Write (MS Word)

**Training Text**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis uma. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. (Esper, 2002 #23; Forgacs, 2004 #8; Freedman, 2007 #5)

Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci. Aenean nec lorem. In porttitor. Donec laoreet nonummy augue. (Budny, 2009 #33)

Suspendisse dui purus, scelerisque at, vulputate vitae, pretium mattis, nunc. Mauris eget neque at sem venenatis eleifend. Ut nonummy. Fusce aliquet pede non pede. Suspendisse dapibus lorem pellentesque magna. Integer nulla. (Pera-Titus, 2004 #7)

**Bibliography**

Drag'n drop selected references from Endnote to the desired positions in the document

Style: Science

Update Citations and Bibliography

**Training Text**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo magna eros quis uma. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. (1-3)

Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci. Aenean nec lorem. In porttitor. Donec laoreet nonummy augue. (4)

Suspendisse dui purus, scelerisque at, vulputate vitae, pretium mattis, nunc. Mauris eget neque at sem venenatis eleifend. Ut nonummy. Fusce aliquet pede non pede. Suspendisse dapibus lorem pellentesque magna. Integer nulla. (5)

**Bibliography**

- J. Esper, E. R. Cook, F. H. Schweingruber, Low-frequency signals in long tree-ring chronologies for reconstructing past temperature variability. *Science* 295, 2250-2253 (2002); published online EpubMar 22 (10.1126/science.1066208).
- E. Forgacs, T. Cserháti, G. Oros, Removal of synthetic dyes from wastewaters: A review. *Environment International* 30, 953-971 (2004); published online EpubSep (10.1016/j.envint.2004.02.001).
- D. A. Freedman, R. Pisan, R. Purves, *Statistics*. (W.W. Norton & Company, New York, ed. 4th, 2007), pp. 576.
- E. Budny, M. Chlosta, H. J. Meyer, M. J. Skibniewski, in *Springer Handbook of Mechanical Engineering*, K.-H. Grote, E. K. Antonsson, Eds. (Springer Berlin Heidelberg, 2009), chap. 14, pp. 1149-1266.
- M. Pera-Titus, V. García-Molina, M. A. Baños, J. Giménez, S. Esplugas, Degradation of chlorophenols by means of advanced oxidation processes: A general review. *Applied Catalysis B: Environment* 47, 219-256 (2004); published online EpubFeb 20 (10.1016/j.apcatb.2003.09.010).

Select the wanted <Style>, then <Update Citations & Bibliography>

Training Library.en

Science

My Library	Author	Reference ...	Year
All References (11)	Budny, Eu...	Book Section	2009
Training Text.docx (5)	Cai, J.; Ru...	Journal Arti...	2010
Sync Status...	Clifford, S...	Journal Arti...	2009
Unfiled	Esper, J.; ...	Journal Arti...	2002
Trash	Forgacs, ...	Journal Arti...	2004
	Freedman...	Book	2007
<b>My Groups</b>	Milne, W. I...	Journal Ar...	2004
Just somethi... (1)	Neyens, E...	Journal Arti...	2004
My best papers (1)	Pera-Titus, ...	Journal Article	2004
Training (10)	Schwarze...	Book	2003

Training Library.en

Science

My Library	Author	Reference ...	Year
All References (11)	Budny, Eu...	Book Section	2009
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Sync Status...	Forgacs, ...	Journal Arti...	2004
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Trash	Pera-Titus, ...	Journal Arti...	2004

EN creates a new group incl. the references associated with the docx-file

# Cite-While-You-Write (MS Word)

The screenshot shows the Microsoft Word interface with the EndNote X7 ribbon active. The 'Style' dropdown is set to 'Science Copy' and is highlighted with a red box. The 'Update Citations and Bibliography' button is also highlighted with a red box. The document content includes a section titled 'Training Text' with three paragraphs of Lorem Ipsum text, each followed by a number in parentheses: (1-3), (4), and (5). Below this is a 'Bibliography' section with five numbered references. The first reference is highlighted with a red box: '1. J. Esper, E. R. Cook, F. H. Schweingruber, Low-frequency signals in long tree-ring chronologies for reconstructing past temperature variability. *Science* 295, 2250-2253 (2002). doi: 10.1126/science.1066208'. The status bar at the bottom indicates 'Page: 1 of 1', 'Words: 236', and 'French (Switzerland)'.

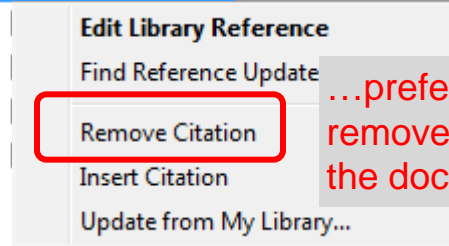
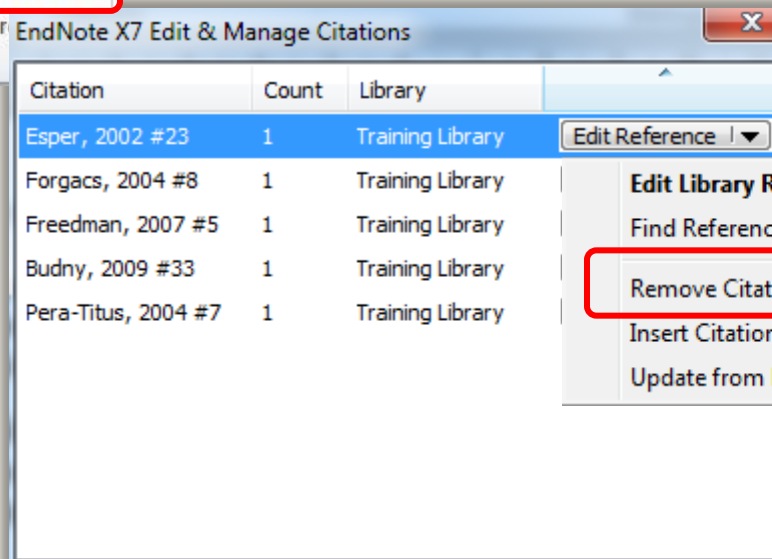
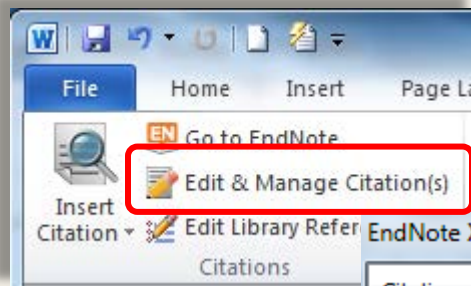
Tip: Double-check if EN's output is according to the journal's requirements or if there are any other issues (eg typos, missing or faulty field info)

Tip: If needed, edit the output style to your satisfaction, save it to another filename, and <Update Citations and Bibliography> using the altered style

Eg The style <Science> required minor adjustments in the reference type <Journal Article>

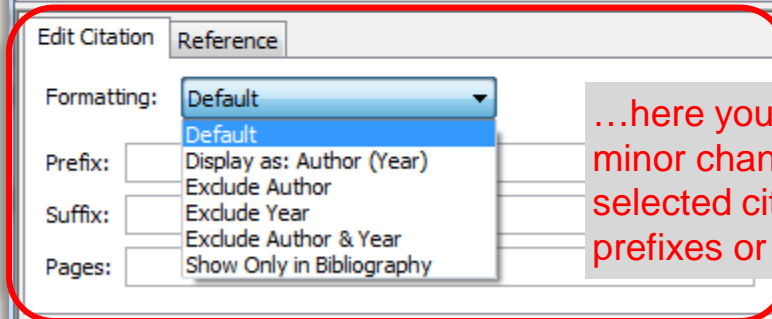
The screenshot shows the EndNote X7 style editor for the 'Science Copy' style. The 'Bibliography' section is expanded, and the 'Journal Article' reference type is selected. The 'Reference Types' dropdown is set to 'Journal Article'. The 'Bibliography' field is highlighted with a red box and contains the text: 'Author | Title | Journal Volume | Pages | (Year) | . | doi: | DOI |'. The 'Bibliography' section is also highlighted with a red box.

# Cite-While-You-Write (MS Word)



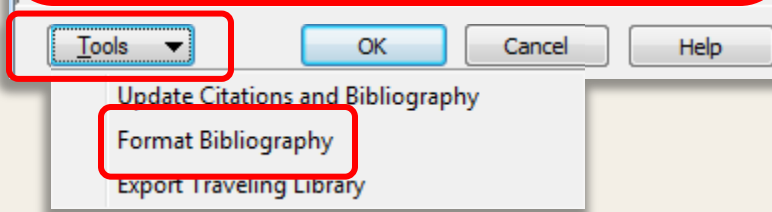
...preferably use this to remove a citation from the document

Tip: Use <Edit & Manage Citations> of EN's Word plugin to delete individual citations, to quickly adjust the output for one or more citation, and more.



...here you can introduce minor changes to the selected citations incl. prefixes or suffixes

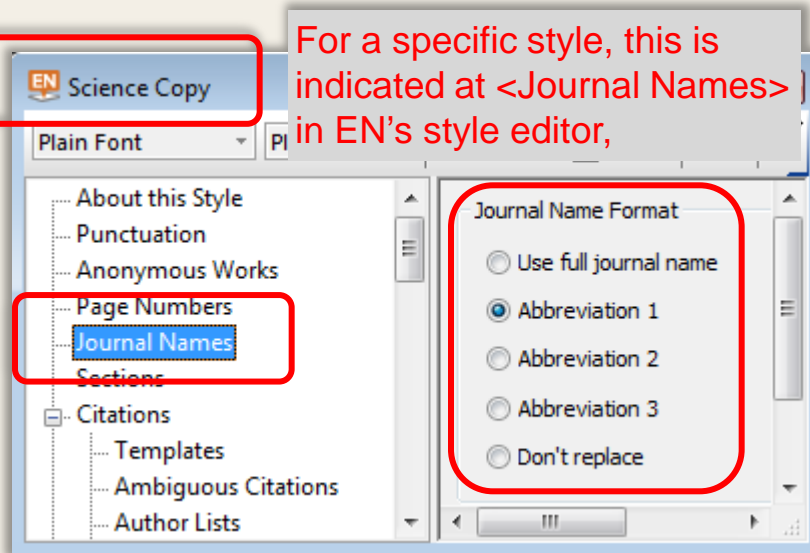
...here you can alter eg font, indent, line spacing etc of your bibliography



# Cite – Using Journal Abbreviations

- Some journals require the journal title to be abbreviated in the bibliography

For a specific style, this is indicated at <Journal Names> in EN's style editor,

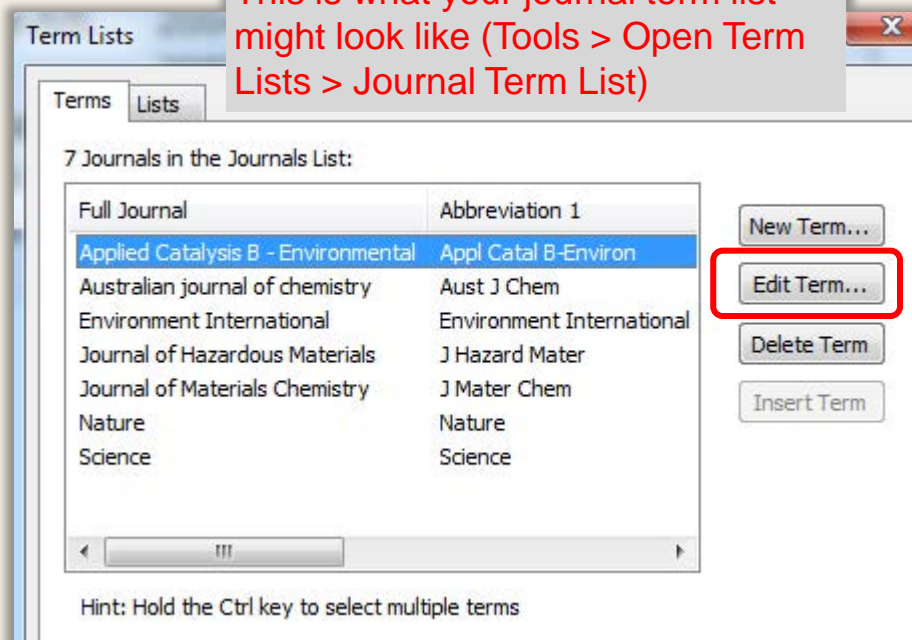


- The full title and up to 3 abbreviations for journals can be defined in a so called journal <Term List>
- Endnote
  - a) by default, copies the content of the reference field <Alternate Journal> as <Abbreviation 1> into a linked journal <term list>.
  - b) allows the import of built-in journal <term lists> (ASCII files)
  - c) allows to generate your own user defined journal <term list> (ASCII file)
- **Method a) is the most straight forward one**  
Method b) is particularly useful to save time with large amounts of citations  
Method c) might require lots of manual editing

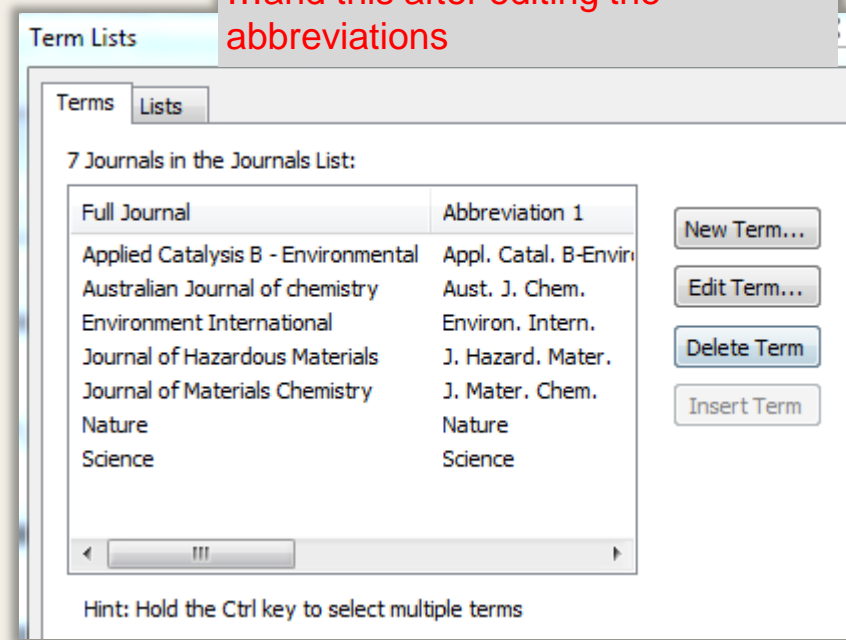


# Cite – Using Journal Abbreviations (Method a)

This is what your journal term list might look like (Tools > Open Term Lists > Journal Term List)



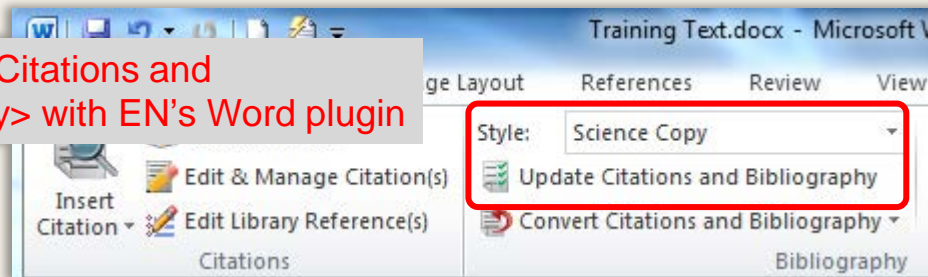
...and this after editing the abbreviations



- Tip: If you are having troubles finding 'correct' abbreviations see <http://www.lib4ri.ch/resources/journals.html#catalogues>
- Tip: Save your journal term list (\*.txt) for future use, expansion or simply as a backup

# Cite – Using Journal Abbreviations

...Update <Citations and Bibliography> with EN's Word plugin



...and observe the effect on the bibliography

## Bibliography

1. J. Esper, E. R. Cook, F. H. Schweingruber, Low-frequency signals in long tree-ring chronologies for reconstructing past temperature variability. *Science* 295, 2250-2253 (2002). doi: 10.1126/science.1066208
2. E. Forgacs, T. Cserhádi, G. Oros, Removal of synthetic dyes from wastewaters: A review. *Environ. Intern.* 30, 953-971 (2004). doi: 10.1016/j.envint.2004.02.001
3. D. A. Freedman, R. Pisani, R. Purves, *Statistics*. (W.W. Norton & Company, New York, ed. 4th, 2007), pp. 576.
4. E. Budny, M. Chłosta, H. J. Meyer, M. J. Skibniewski, in *Springer Handbook of Mechanical Engineering*, K.-H. Grote, E. K. Antonsson, Eds. (Springer Berlin Heidelberg, 2009), chap. 14, pp. 1149-1266.
5. M. Pera-Titus, V. García-Molina, M. A. Baños, J. Giménez, S. Esplugas, Degradation of chlorophenols by means of advanced oxidation processes: A general review. *Appl. Catal. B-Environ.* 47, 219-256 (2004). doi: 10.1016/j.apcatb.2003.09.010

# Introduction to Endnote X7

## EN's GUI

- Create a new library (10)
- Graphical User Interface (11)

## Collect

- Endnote's built-in online search (16)
- Export / import after an external database search (21)
- Import metadata from PDFs (26)
- Manually adding & altering references (27)
- Find & attach full text PDFs (29)

## Organise

- Building groups (33)
- Checking & Updating references (34)
- Finding duplicates (35)
- Searching references (incl. PDFs & annotations) (36)
- Backing up your library (37)

## Cite

- Bibliographic output styles (39)
- Cite-while-you-write (MS Word) (44)
- Using journal abbreviations (48)

## Share & Sync

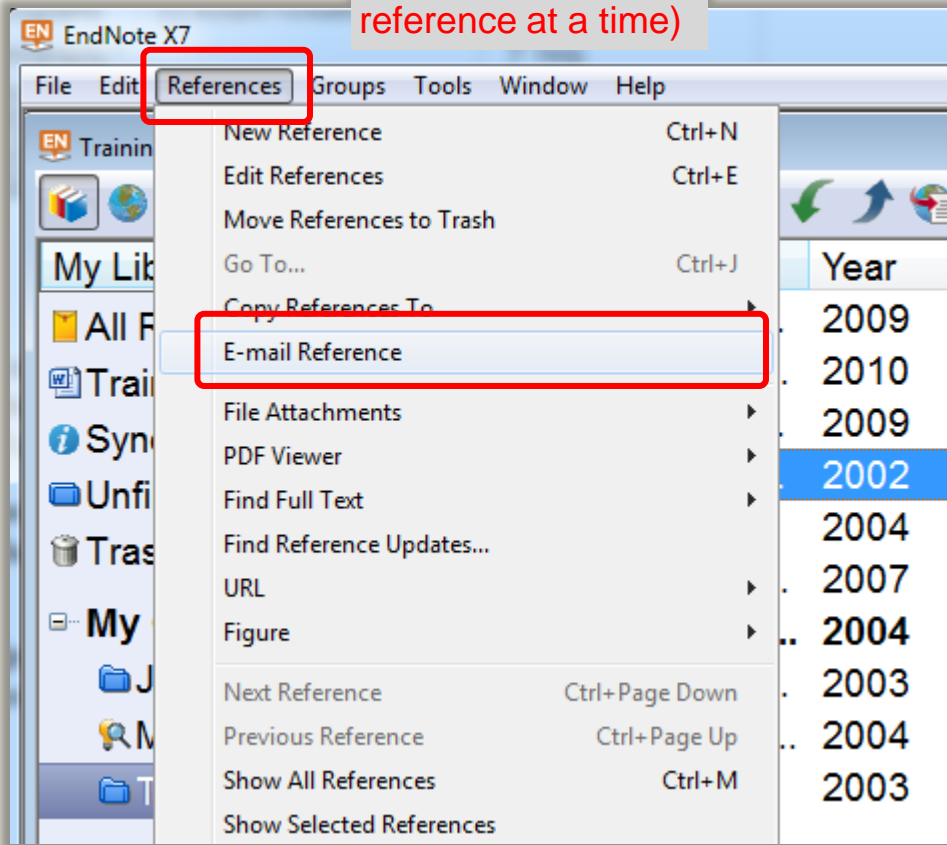
- Without EN Online Account (52)
  - Share references via E-mail
  - Share travel library via Word plugin
  - Share library as a compressed library or via servers
- With EN Online Account (55)
  - Sync between your devices
  - Share entire library ( $\geq$  EN X7.2)
  - Share groups (EN Online only)

## Concluding Info, Help & Useful Links

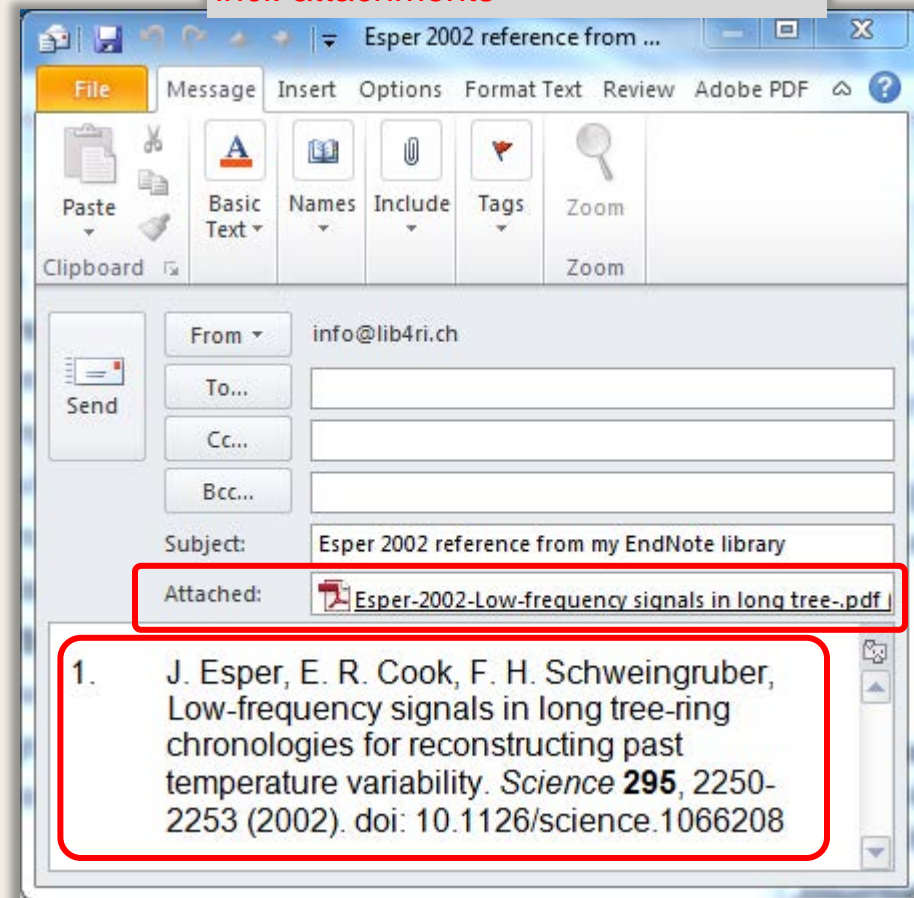
- Endnote can do more (60)
- Is Endnote the right thing for me (61)
- User Guides & Tutorials (63)
- Support, Forum, FAQ, Blogs, Community, ... (65)

# Sharing without an EN Online Account

...via e-mail (one reference at a time)

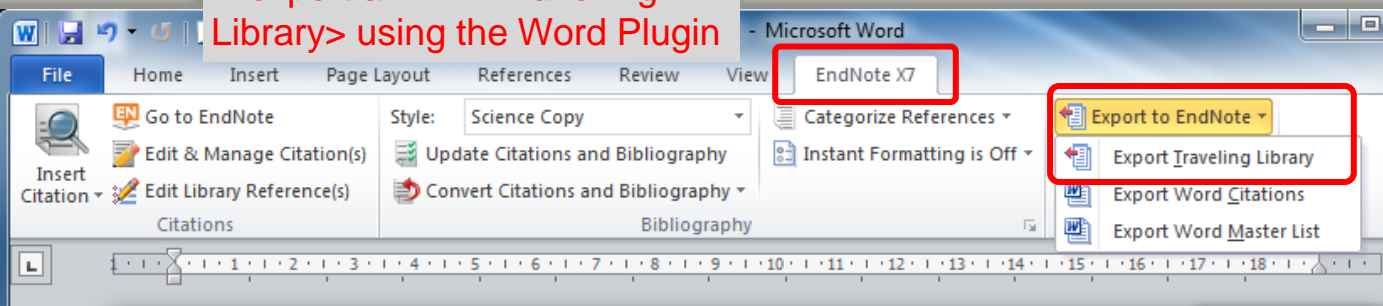


... formatted according to your style, incl. attachments



# Sharing without an EN Online Account

...export an EN <Travelling Library> using the Word Plugin

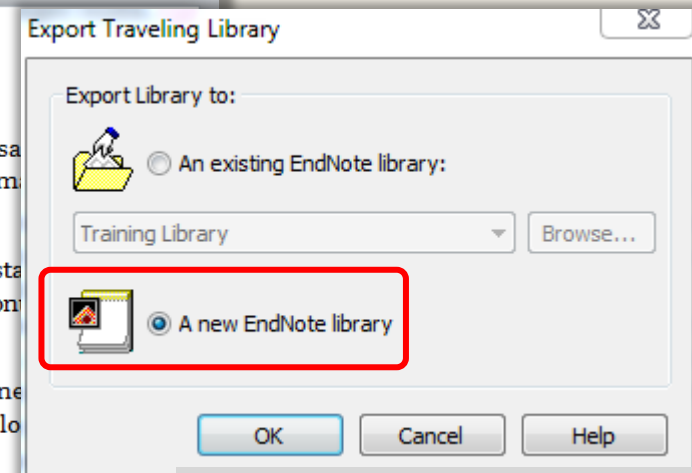


**Training Text**

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Maecenas porttitor congue massa posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet commodo mi quis uma. Nunc viverra imperdiet enim. Fusce est. Vivamus a tellus. (1-3)

Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egesta pharetra nonummy pede. Mauris et orci. Aenean nec lorem. In porttitor. Donec laoreet non augue. (4)

Suspendisse dui purus, scelerisque at, vulputate vitae, pretium mattis, nunc. Mauris eget ne sem venenatis eleifend. Ut nonummy. Fusce aliquet pede non pede. Suspendisse dapibus lo pellentesque magna. Integer nulla. (5)



...an EN library is created from the citations in the Word document (no attachments)

## Bibliography

1. J. Esper, E. R. Cook, F. H. Schweingruber, Low-frequency signals in long tree-ring chronologies for reconstructing past temperature variability. *Science* **295**, 2250-2253 (2002). doi: 10.1126/science.1066208
2. E. Forgacs, T. Cserhádi, G. Oros, Removal of synthetic dyes from wastewaters: A review. *Environ. Intern.* **30**, 953-971 (2004). doi: 10.1016/j.envint.2004.02.001
3. D. A. Freedman, R. Pisani, R. Purves, *Statistics*. (W.W. Norton & Company, New York, ed. 4th, 2007), pp. 576.
4. E. Budny, M. Chłosta, H. J. Meyer, M. J. Skibniewski, in *Springer Handbook of Mechanical Engineering*, K.-H. Grote, E. K. Antonsson, Eds. (Springer Berlin Heidelberg, 2009), chap. 14, pp. 1149-1266.
5. M. Pera-Titus, V. García-Molina, M. A. Baños, J. Giménez, S. Esplugas, Degradation of chlorophenols by means of advanced oxidation processes: A general review. *Appl. Catal. B-Environ.* **47**, 219-256 (2004). doi: 10.1016/j.apcatb.2003.09.010

# Sharing without an EN Online Account

- ↪ **Share your library (or groups thereof) by using EN's compress library feature**
  - The entire library or just groups incl. attachments can be compressed in one single file (refer to backup)
  
- ↪ **Share your library via an institutional server**
  - Put your library on a shared server
  - One person at a time has full access
  - Note that this can corrupt your library if the server has an outage
  
- ↪ **Don't share and sync your library via Dropbox and other Cloud services**
  - Endnote behaves like a time bomb and your library will eventually become corrupted. This is NOT recommended by Endnote at all!
  
- ↪ **Should your library get corrupted**
  - Endnote offers a repair tool with limited capabilities via Tools > Recover Library

# Share & Sync Using an EN Online Account

Sign up for Endnote Online at [www.myendnoteweb.com](http://www.myendnoteweb.com)

ENDNOTE®

**Sign In or create an account**

E-mail:

Password:

**Login**

Keep me signed in



EndNote Preferences

Change Case  
Display Fields  
Display Fonts  
Duplicates  
Find Full Text  
Folder Locations  
Formatting  
Libraries  
PDF Handling  
Read / Unread  
Reference Types  
Sorting  
Spell Check  
**Sync**  
Temporary Citations  
Term Lists  
URLs & Links

Synchronize your data with your EndNote account. [Learn more](#)

Upgrade or create your two-year EndNote account to get the latest features and enable Sync.

**Enable Sync**

EndNote Account Credentials

Email Address:

Password:

Sync this EndNote Library

Sync Automatically

EndNote Defaults    Revert Par...

Open your EN X7 library and enter your details at **Edit > Preferences > Sync**

If you always work with one and the same library, you can activate **<Sync Automatically>**, or else manually sync via **Tools > Sync**

- ↳ Tip: Important - Backup your library prior to enabling Sync
- ↳ Tip: Important - Should you have an account with Thomson Reuters (alerts with Web of Science, Researcher ID, etc), use your existing credentials to sign into Endnote Online
- ↳ Tip: Only one single library can be synced (no smart groups)

# Share & Sync Using an EN Online Account

Now, your EN Online account contains all your X7 references, attachments & groups (taken from all group sets)

The screenshot shows the EndNote web interface. The browser address bar is [www.myendnoteweb.com/EndNoteWeb.html](http://www.myendnoteweb.com/EndNoteWeb.html). The page title is "ENDNOTE®". The navigation tabs are "My References", "Collect", "Organize", "Format", "Options", and "Connect<sup>Beta</sup>".

The "My References" sidebar on the left contains a "Quick Search" section with a search box and a dropdown menu set to "All My References". Below this is a list of "My References" including "All My References (11)", "[Unfiled] (0)", "Quick List (0)", and "Trash (0)". A red box highlights the "My Groups" section, which includes "Just something to show (1)", "Training (10)", and "Yet another group (1)". Below the groups is a section for "Groups Shared by Others" with "Bobby's publications (36)". At the bottom of the sidebar is a "Build a profile to showcase your own work. ResearcherID" link.

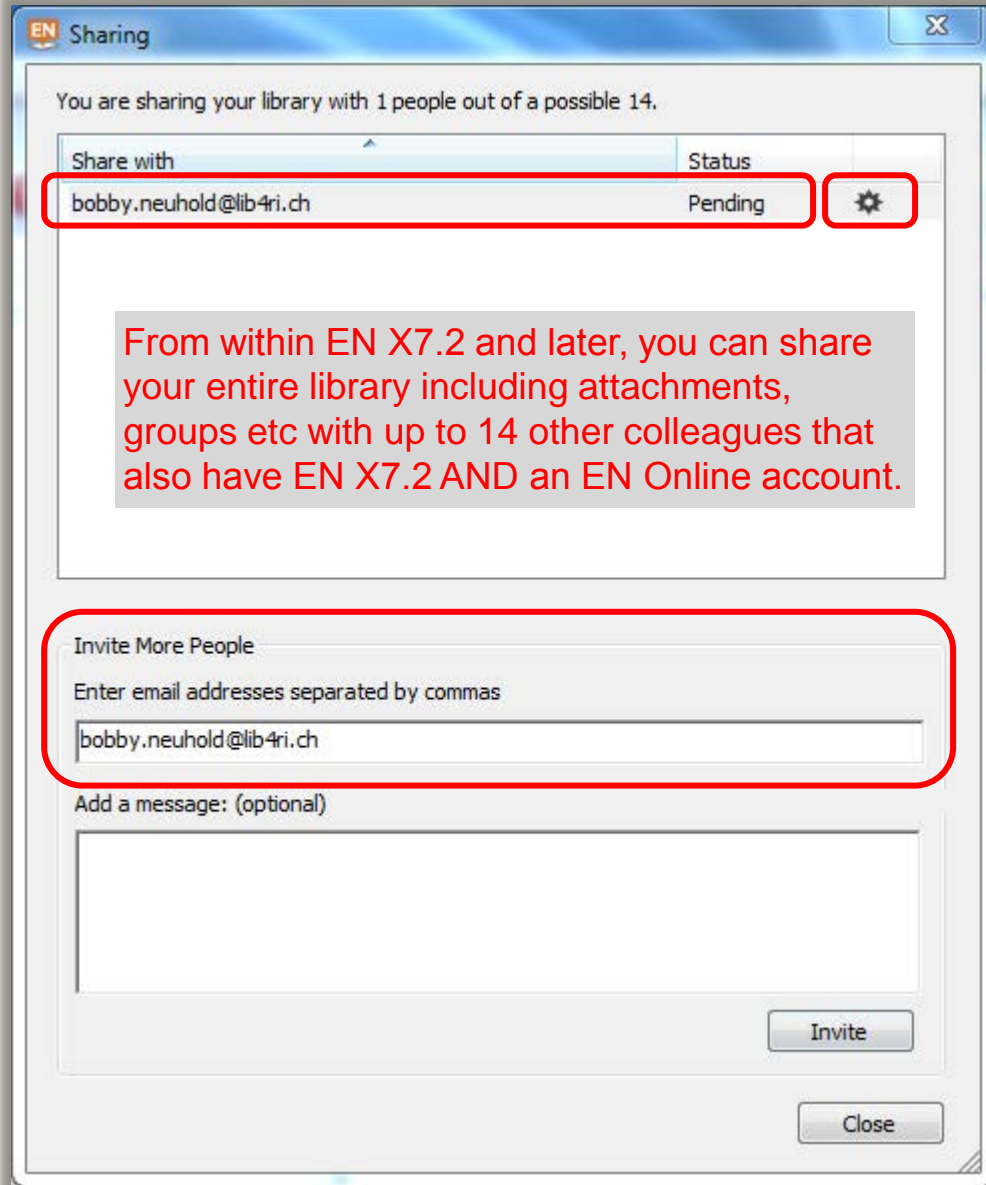
The main content area is titled "Training" and shows a list of references. The list is sorted by "First Author -- A to Z" and shows 10 references per page. The first two references are:

Author	Year	Title
Budny, Eugeniusz	2009	Construction Machinery Springer Handbook of Mechanical Engineering Added to Library: 12 Nov 2014 Last Updated: 12 Nov 2014 Online Link→ Go to URL
Cai, J.	2010	Atomically precise bottom-up fabrication of graphene nanoribbons Nature Added to Library: 12 Nov 2014 Last Updated: 12 Nov 2014 Online Link→ Go to URL


Tip: If you like to sync this library with another device (PC, Mac or iPad), create a new library on that device, then enable and start syncing therein (max 3 for one account)



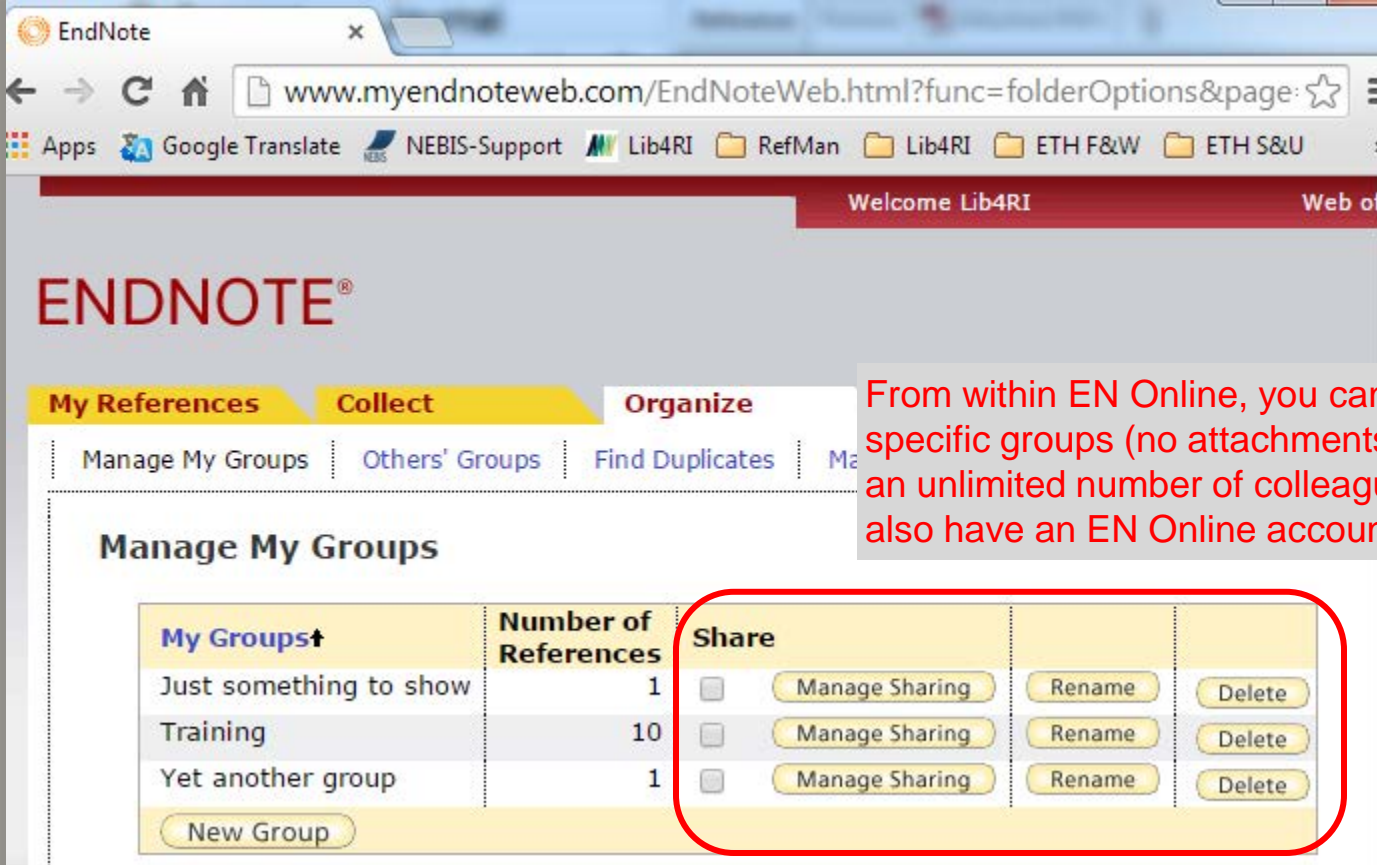
# Share & Sync Using an EN Online Account



From within EN X7.2 and later, you can share your entire library including attachments, groups etc with up to 14 other colleagues that also have EN X7.2 AND an EN Online account.

- ↳ Tip: After the invitee accepts your invitation (via e-mail) his sharing status <Pending> changes to <Member>; you can revoke the membership at any time via 
- ↳ Tip: From within EN X7.2 and later, the new member now has full access to your library via File > Open Shared Library. Note that all his changes will effect your (shared) library as well.

# Share & Sync Using an EN Online Account



From within EN Online, you can share specific groups (no attachments) with an unlimited number of colleagues that also have an EN Online account.

My Groupst	Number of References	Share		
Just something to show	1	<input type="checkbox"/>	Manage Sharing	Rename Delete
Training	10	<input type="checkbox"/>	Manage Sharing	Rename Delete
Yet another group	1	<input type="checkbox"/>	Manage Sharing	Rename Delete

New Group

Tip: Groups shared via EN Online are only accessible via EN Online (but can be exported to X7)

Tip: Endnote Online is a fully functional Reference Manager with limited functionality, particularly without a full EN X7 licence. Check Useful Links (below) to find more info on EN Online.

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## ↵ Organise

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## ↵ Cite

- Bibliographic output styles (39)
- Cite-while-you-write (MS Word) (44)
- Using journal abbreviations (48)

## ↵ Share & Sync

- Without EN Online Account (52)
  - Share references via E-mail
  - Share travel library via Word plugin
  - Share library as a compressed library or via servers
- With EN Online Account (55)
  - Sync between your devices
  - Share entire library (≥ EN X7.2)
  - Share groups (EN Online only)

## ↵ Concluding Info, Help & Useful Links

- Endnote can do more (60)
- Is Endnote the right thing for me (61)
- User Guides & Tutorials (63)
- Support, Forum, FAQ, Blogs, Community, ... (65)

# Endnote can do more...

- ↪ Categorise bibliographies (eg for CVs)
- ↪ Cite within Powerpoint (plugin)
- ↪ Footnotes
- ↪ Built-in Word manuscript templates (for various journals)
- ↪ Handle figures and tables (for referencing in Word)
- ↪ Repair broken libraries
- ↪ ...

**Be explorative**

**...but never  
without a backup**

# Is Endnote the right thing for me?

↩ A quick comparison sheet (Endnote, Mendeley, Zotero) is in your documentation

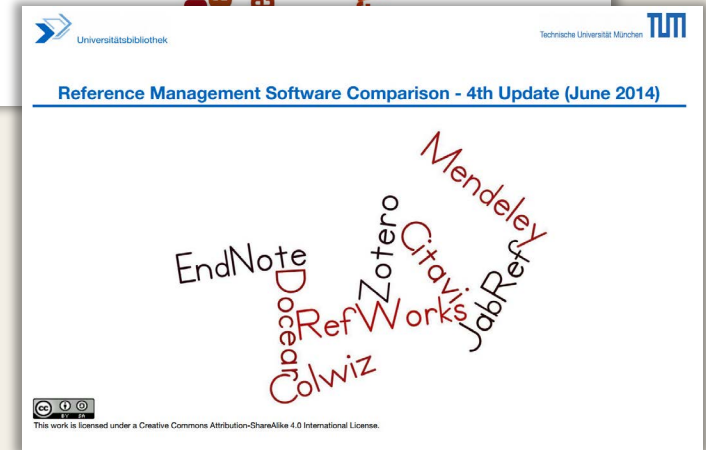
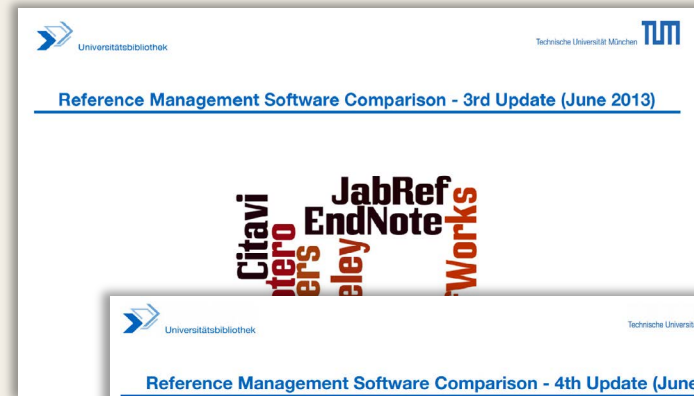
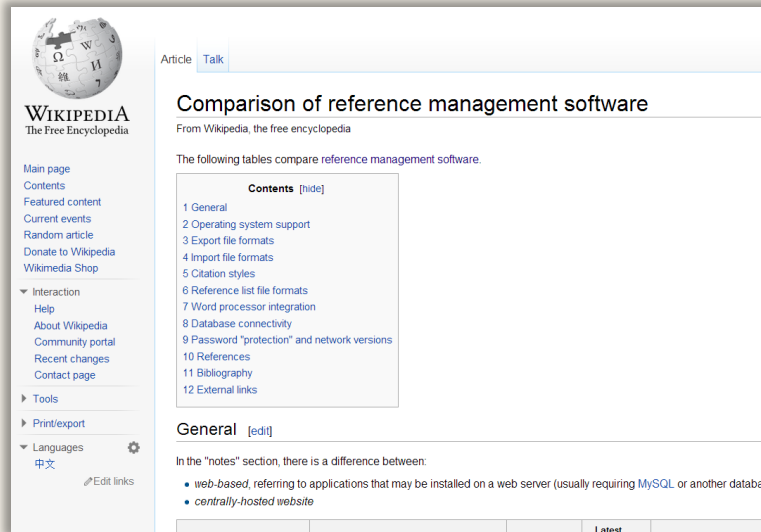
**Quick Comparison Endnote, Mendeley, Zotero**

More comparisons see: [http://www.lib4ri.org/2016/11/01/quick-comparison-endnote-mendeley-zotero/](#)  
[http://www.lib4ri.org/2016/11/01/quick-comparison-endnote-mendeley-zotero/](#)

Bobo Nephos, Lib4RI, 25 Dec 2014

General	Endnote	Mendeley	Zotero
Link	<a href="http://www.endnote.com">www.endnote.com</a>	<a href="http://www.mendeley.com">www.mendeley.com</a>	<a href="http://www.zotero.org">www.zotero.org</a>
Platform	Win, OSX, OS (Parallels); Web	Win, OSX, Linux, iOS, Android (3rd party apps); Web	Win, OSX, Linux (Firefox extension or standalone with connectors to Chrome, Safari, Firefox, iOS & Android) (3rd party apps); Web
Language	English	English	multilingual
License	Full license (\$300; client & Web), free licence (Endnote WebBasic) reduced functions, particularly without Web or Science	2 GB free; 5 GB (\$5/year), unlimited (\$165/year) via Mendeley account	300 MB free, expandable by Dropbox; 4GB-25 GB (\$100/year) via Zotero account
Online storage	2 GB free Endnote WebBasic; unlimited (full license)	via Endnote WebBasic account	via Zotero account
Synching	Endnote library (inc. attachments) with max 14 other groups (inc. attachments) with unlimited others via Endnote Web	100 MB free, 1 group, 3 members; unlimited 1 MB & groups, from 140 month 2 members	unlimited groups & members
Sharing	via Endnote WebBasic account	via Mendeley account	via Zotero account
Max. datasets	unlimited (3GB with free Endnote WebBasic)	unlimited	unlimited groups & members
Word processor	Word, Open Office, Pages	Word, Open Office, LaTeX via BibTeX sync	Word, Open Office
<b>Data Input / Import / export</b>			
Manual input	yes	yes	yes
Import from database	yes	yes	yes
Import from website	yes (with capture via Endnote WebBasic)	yes	yes
Import from PDF	yes	yes	yes
Find full text (PDF)	Automatically (Web, DOC, Plummet)	yes (via web) (Protein)	yes
Adapt file	manually: OpenURL, http://dx.doi.org/10.1017/9780521874819	yes	yes
Import/export filter	Bibtex, RIS, Endnote XML, etc	manually: Mendeley's closed sourced database, OpenURL, http://dx.doi.org/10.1017/9780521874819	manually: Crossref, Google Scholar, OpenURL, http://dx.doi.org/10.1017/9780521874819
<b>Handling</b>			
# Document types (Book, article, etc)	30	30	35
Search online databases	yes (many connectors inc: Web of Science & ABI/IN)	only Mendeley's closed sourced database (yes)	yes (inc: PDFs)
Search duplicates	yes (inc: PDFs and annotations)	yes	yes
Provide duplicate/alternatives	yes	yes	yes
Read / annotate PDFs	yes (built-in)	yes (inc: PDFs)	yes (inc: PDFs)
PDF organizer	yes (built-in)	yes	yes
Sort references	yes (intact)	yes	yes
Update metadata	yes (semi-automatic)	yes (built-in)	yes
Organise in groups or folders	yes	yes	yes
Backup library	yes (compressed Endnote library)	yes (manually)	yes (external PDF reader)
<b>Citation</b>			
Style	> 6000 (client), ~3000 (Web), top-21 (without Web)	>6000 (client)	yes (limited)
Style editor	yes (built-in)	yes (dipped style library, no attachments)	yes (manually)
Information with word processor	plugin (client & Web)	plugin	via export
<b>Help</b>			
Manuals, Tutorials, Training, Support	<a href="http://www.endnote.com/support">http://www.endnote.com/support</a>	<a href="http://www.mendeley.com/support">http://www.mendeley.com/support</a>	<a href="http://www.zotero.org/support">http://www.zotero.org/support</a>
FAQ	<a href="http://www.endnote.com/support/faq">http://www.endnote.com/support/faq</a>	<a href="http://www.mendeley.com/support/faq">http://www.mendeley.com/support/faq</a>	<a href="http://www.zotero.org/support/faq">http://www.zotero.org/support/faq</a>
Forum	<a href="http://www.endnote.com/support/forums">http://www.endnote.com/support/forums</a>	<a href="http://www.mendeley.com/support/forums">http://www.mendeley.com/support/forums</a>	<a href="http://www.zotero.org/support/forums">http://www.zotero.org/support/forums</a>
Blog	<a href="http://www.endnote.com/support/blog">http://www.endnote.com/support/blog</a>	<a href="http://www.mendeley.com/support/blog">http://www.mendeley.com/support/blog</a>	<a href="http://www.zotero.org/support/blog">http://www.zotero.org/support/blog</a>

# Is Endnote the right thing for me?



## Comprehensive comparisons

- [Wikipedia > Comparison of reference management software](#)
- Digital Collection Management TU Munich  
<https://mediatum.ub.tum.de/?id=1274008> (2015)

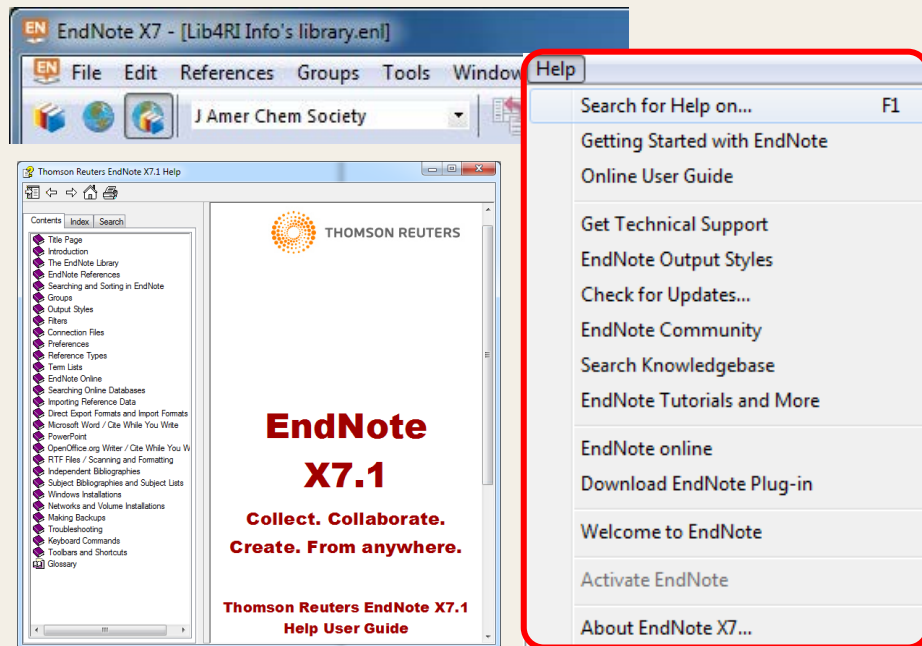


Talk to colleagues. Which software do they use and why !

# Help, User Guides & Tutorials

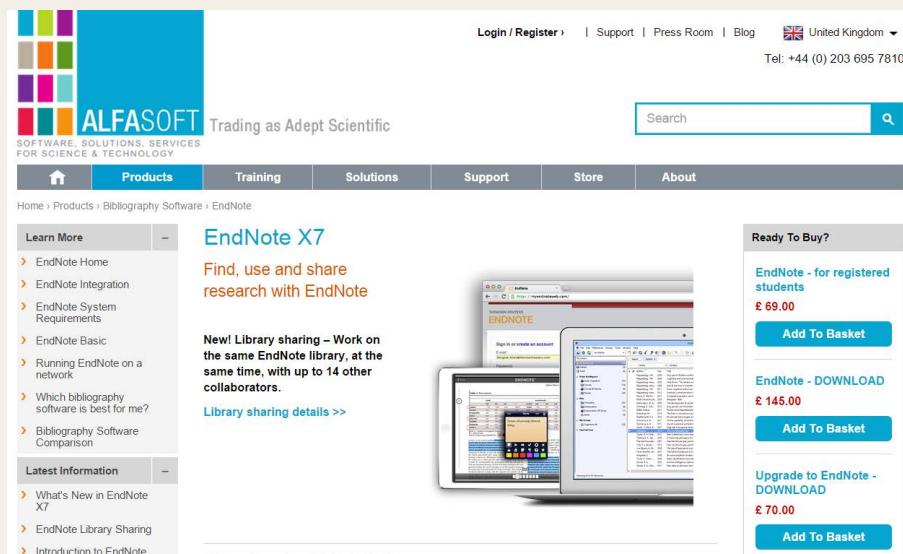
## Via Endnote Help you have access to

- the built-in Endnote help, “F1” (PDF located in program folder)
- online training resources (tutorials, online user manual, webinars)
- technical support, knowledge base, community, programs updates, more styles, ...
- More via [www.endnote.com](http://www.endnote.com)



## Alfasoft's (Adept Scientific's) Endnote portal offers

- more training material incl. product manuals, quick reference & how to guides, case studies, ...
- note that some resources require a one-off email registration
- visit [www.adeptscience.co.uk](http://www.adeptscience.co.uk) and navigate to > Products > Endnote



# Lib4RI Endnote Quick Guide

- Lib4RI's Info #06 covers relevant essentials to work with Endnote X7
- Find it in your documentation or download it via our website:  
[www.lib4ri.ch/services/lib4ri-info.html](http://www.lib4ri.ch/services/lib4ri-info.html)





# Useful Links

## ↩ Downloads

- <http://endnote.com> > Downloads
- <http://www.adeptscience.co.uk>  
> Support > Download > Endnote

## ↩ User Guides, Help, Tutorials, Training Videos & Classes

- <http://endnote.com> > Support
- <http://endnote.com> > Training (incl. Little-Endnote-How-To-Book)
- <http://www.myendnoteweb.com>  
> Help
- <http://www.youtube.com/user/EndNoteTraining>
- <http://www.adeptscience.co.uk>  
> Support > Downloads > Endnote

## ↩ Support, Knowledge Base, Community, Forum, FAQ, Blogs

- <http://endnote.com> > Support
- <http://community.thomsonreuters.com>
- <http://www.myendnoteweb.com>  
> Connect (registration required)
- <http://endnote.com> > Support  
> Endnote FAQs
- <http://www.adeptscience.co.uk>  
> Support > Knowledge Base  
> Endnote
- <http://www.adeptscience.co.uk>  
> Support > Knowledge Base  
> Endnote Web
- <http://adeptscience.co.uk> > Support  
> List Archives > Endnote Archive
- <http://endnote.com> > Blog

# Thank you

Don't hesitate to ask for our  
assistance

Stephanie Hofmann & Bobby Neuhold

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