Citation Management with Endnote

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Thüringer Universitäts- und Landesbibliothek
Workshop Overview

1. 10:15 – ca. 16:00
2. Lunch break 12:45-13:30

What to expect?

*Introduction into the reference management software EndNote*

Import, organization and usage of bibliographic data

How are we proceeding?

1. Presentation & live demonstrations
2. Exercises
Why reference management?

Collecting bibliographic data by hand/on paper?

1. Lots of effort
2. Prone to errors
3. Difficult to organize

Reference management software like EndNote offers:
1. Central database for bibliographic information
2. Automatic import of bibliographic data

„In need to cite an article I read half a year ago – but can’t find it again!“

Citation management instead of chaos
Creating citations and bibliographies when writing papers/theses:

(1) Lots of effort

(2) Correct formatting is difficult

(3) How to avoid errors

Reference management software can do this automatically!
Introduction & Installation
Introduction (1)

*EndNote* is a database program.

*EndNote* helps

- Collecting and organizing literature (bibliographic references, full-texts, abstracts, pictures, figures, tables ...) and
- Writing scientific works

*EndNote* is the most used Reference Management Software worldwide.

Competitors are *Reference Manager, Citavi, ProCite, Mendeley, Zotero*
Introduction (2)

• Save references in a *Library*, which is saved locally
• Unlimited amount of *References* in a library
• Insertion of citations into your documents and automatic generation of bibliographies
• Great amount of formatting styles (>5550 Output Styles)
Introduction (5)

- Producer: Thomson Reuters
- Thomson Reuters:
  Producer of *Web of Science (WoS, Web of Knowledge)*, *EndNote & EndNote Web*

- *EndNote* and *EndNote Web* are integrated into *WoS* and optimized for use with *WoS*
- *EndNote Web* can be used for free for subscribers to *WoS* (-> free for university members and students of the TU Dresden)
Introduction (1)

Important Competitors:

• *Citavi* ([www.citavi.com](http://www.citavi.com))
  - Similar to *EndNote*
  - Knowledge management functions: Create and organize citations and notes
  - Only for Windows
  - Commercial Product

• *Zotero* ([http://www.zotero.org/](http://www.zotero.org/))
  - Browser-plugin, platform-independent, free
  - Good for direct import of references into your database

• *Mendeley* ([www.mendeley.com](http://www.mendeley.com))
  - Both online/offline versions, platform-independent, free
  - Social network functions for scientists
Introduction (2)

Important Competitors:

• **Refworks** ([http://www.refworks.com](http://www.refworks.com))
  • Web based (no local installation), collaborative sharing
  • No PDF editing possible
  • **TU Dresden licence**: [http://www.slub-dresden.de/service/schreiben-publizieren/refworks/](http://www.slub-dresden.de/service/schreiben-publizieren/refworks/)

• **JabRef** ([http://jabref.sourceforge.net](http://jabref.sourceforge.net))
  • Open Source, multi-platform
  • Specific for editing BibTeX-Databases
  • **BibTeX is a module for the LaTeX-word processor**
System requirements (1)

- Windows
  - Windows XP, Vista, 7, 8
- Macintosh
  - Mac OS X 10.6 and later
- Word Processors (Windows)
  - Microsoft Power Point 2013
  - Open Office 3.X
  - RTF files
- Word Processors (Mac)
  - Apple Pages 09
Installation (1)

• Free trial version (valid for 30 days)
• Full version is available only with costs
  • German distributor: http://directory.adeptscience.de/
  • Prices: Academics: € 264, students € 132

• Installation on University Computers: Check with ZIH:
  • http://tu-resden.de/die_tu_dresden/zentrale_einrichtungen/zih
Installation (2)

• Installation modi:

  1) Automatic Installation: Installation of the 100 most important citations styles


• Additional styles can be imported at a later date

  1) *EndNote Style Collection*:  
     http://www.endnote.com/support/enstyles.asp

     – More than 5500 *Output Styles*

     – Sorting options
First Steps & References
User interface

Menu and tool bars with common commands, e.g. import, online search, insert into Word etc.
First steps: Creation of an Endnote library

EndNote Libraries consist of two components: .enl and .data.

- Create a new library using the File/New menu option
- Open an existing library using File/Open
- Database file format: .enl ("EndNote Library")
- .data folder with full texts etc.
Display Fields – bibliographic metadata

Column bar with up to 10 columns (Clicking on columns sorts entries)

Edit Columns using Edit / Preferences / Display Fields
Display fields—individual ratings

<table>
<thead>
<tr>
<th>Author</th>
<th>Year</th>
<th>Title</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voedisch, Martin; Scherlach, Kirstin; Winkle...</td>
<td>2011</td>
<td>Analysis of the Aspergillus fumigatus P...</td>
<td>★★★★☆</td>
</tr>
<tr>
<td>Volling, Katrin; Thywissen, Andreas; Brakhage, ...</td>
<td>2011</td>
<td>Phagocytosis of melanized Aspergillus co...</td>
<td>★★★☆☆</td>
</tr>
<tr>
<td>Nichols, A. C.; Chan-Seng-Yue, M.; Yoo, J.; Xu, ...</td>
<td>2012</td>
<td>A Pilot Study Comparing HPV-Positive an...</td>
<td>★★★☆☆</td>
</tr>
<tr>
<td>Weidner, Gerhard; Steidl, Stefan; Brakhage,...</td>
<td>2001</td>
<td>The Aspergillus nidulans homoaconitases...</td>
<td>★★★☆☆</td>
</tr>
<tr>
<td>Weidner, G; Steffan, B; Brakhage, A A</td>
<td>1997</td>
<td>The Aspergillus nidulans lysF gene enco...</td>
<td>★★★☆☆</td>
</tr>
<tr>
<td>Weidner, Gerhard; D’Enfert, Christopher; Koch, ...</td>
<td>1998</td>
<td>Development of a homologous transform...</td>
<td>★★★☆☆</td>
</tr>
<tr>
<td>Wartenberg, Dirk; Lapp, Katrin; Jacobsen, Ilse ...</td>
<td>2011</td>
<td>Secretome analysis of Aspergillus fumigat...</td>
<td>★★★☆☆</td>
</tr>
<tr>
<td>Volling, Katrin; Brakhage, Axel A; Saluz, Ha...</td>
<td>2007</td>
<td>Apoptosis inhibition of alveolar macrop...</td>
<td>★★★☆☆</td>
</tr>
<tr>
<td>Voedisch, Martin; Albrecht, Daniela; Lessin...</td>
<td>2009</td>
<td>Two-dimensional proteome reference ...</td>
<td>★★★☆☆</td>
</tr>
<tr>
<td>Van den Brulle, Jan; Steidl, Stefan; Brakhage, A...</td>
<td>1999</td>
<td>Cloning and characterization of an Asperg...</td>
<td>★★★☆☆</td>
</tr>
<tr>
<td>Valiante, Vito; Jain, Radhika; Heinekamp, T...</td>
<td>2009</td>
<td>The MpkA MAP kinase module regulate...</td>
<td>★★★☆☆</td>
</tr>
<tr>
<td>Valiante, Vito; Heinekamp, Thorsten; Jain, ...</td>
<td>2008</td>
<td>The mitogen-activated protein kinase ...</td>
<td>★★★☆☆</td>
</tr>
<tr>
<td>Tuencher, Andre Tuencher Andre; Sproete, Petra...</td>
<td>2005</td>
<td>The CCAAT-binding complex of eukaryote...</td>
<td>★★★☆☆</td>
</tr>
<tr>
<td>Thoen, Marcel; Al-Abdallah, Qusai; Hortsch...</td>
<td>2007</td>
<td>The thioredoxin system of the filament...</td>
<td>★★★☆☆</td>
</tr>
<tr>
<td>Thoen, Marcel; Al Abdallah, Qusai; Hortsch...</td>
<td>2010</td>
<td>The CCAAT-binding complex coordinat...</td>
<td>★★★☆☆</td>
</tr>
<tr>
<td>Then Bergh, Katharina; Litzka, Olivier; Brak...</td>
<td>1996</td>
<td>Identification of a major cis-acting DN...</td>
<td>★★★☆☆</td>
</tr>
</tbody>
</table>

Sort by „read“ • and „unread“〇

Individual Rating: Zero till 5★ possible
Detail view (double click on reference)

Reference type
Rating
Fields
Skip

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Modify reference types

- It is possible to create new reference types and modify existing ones: *Edit/Preferences/References Types*
Keywords

- **Keywords** are possible for all reference types
- **Recommendations**
  - Individual tagging of references
  - Rating of references with e.g. „very important“, „discussion“, „introduction“ etc. allows for fast rediscovery at a later date
Term lists

Manage keywords with term lists: Tools/Open Term Lists

Define list of pre-defined keywords, which will be used by an autocomplete function.

Also available for other fields (e.g. author, journal)
Enter, search and import
✓ Manual data entry
✓ Search in local EndNote libraries
✓ Online search in different databases
✓ Endnote import functions
✓ Search for full texts
Import data – 5 possible ways

**Manual data entry**
- Create new reference
- Select reference type
- Fill in metadata by hand
- Add figures and PDF-files

**Online Search**
- Search and import using the online-mode of EndNote

**Direct export from online databases and catalogues**
- Search in an external database
- Use the Save/Export function
- EndNote starts automatically
- E.g.: WoS
Import data – 5 possible ways

<table>
<thead>
<tr>
<th>Import of PDF-files</th>
<th>From EndNote Web</th>
</tr>
</thead>
<tbody>
<tr>
<td>Metadata of PDF-files are automatically inserted as an Endnote reference and linked to the PDF-file</td>
<td>Synchronisation</td>
</tr>
</tbody>
</table>
Manual data entry

• Select **New Reference** in the toolbar:
• Enter data by hand
• Hints: Enter personal names as “first-name surname” or “surname, first-name”. Add a new line for additional authors/contributors.
• Add a new line for several keywords
• Avoid line breaks in title or other fields

• Attention: Manual data-entry is time-consuming and error-prone: If possible use an online source and import the metadata (bibliographic databases for article, library catalogues for books).
Search in local *EndNote* libraries
3 search modes

**Integrated Library & Online Search Mode**
- **Local + Online**
  - Default
  - Online search results are loaded directly into your own library (*All References*)

**Local Library Mode**
- **Local**
  - Search only in the local library

**Online Search Mode**
- **Online**
  - Only online search
  - Add search results into library by selecting *Copy to Local Library*
3 search modes

- **Integrated Library & Online Search Mode**
- **Local Library Mode**
- **Online Search Mode**

**TIP:**

Edit your references using the Local Library Mode.

When searching in databases with EndNote, use the Online Search Mode.

If possible avoid the **Integrated Library & Online Search Mode**.
Search the local library (1)

1. **Quick Search** & 2. **Library Search**
Search the local library (2)

- Save/Load searches
  - Search the whole library or subsets
  - Automatic truncation (left and right)
  - **Match Case** and **Match Words**: exact search
**Search the local library (3)**

- **Boolean operators:** **AND, OR, NOT**

<table>
<thead>
<tr>
<th>Operator</th>
<th>Bedeutung</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND</td>
<td><strong>Both</strong> conditions have to be true</td>
</tr>
<tr>
<td>OR</td>
<td><strong>One</strong> of the condition has to be true</td>
</tr>
<tr>
<td>NOT</td>
<td>The condition has to be <strong>false</strong></td>
</tr>
</tbody>
</table>
Search in the local library (4)

- Search for keywords or ratings is possible
- Can be used to create smart groups
Online search – Search in external databases
Online search in EndNote (1)

(1) Links (=Connection Files) are available for many databases
   - PubMed
   - Web of Science
   - GeoRef
   - Biological Abstracts
   - Library Catalogues (SWB, GBV)

(2) Add database using **Tools / Online Search... / PubMed**

(3) Database appears in the group **Online Search**
Online Suche in *EndNote* (2)

- In order to search the SLUB library catalogue, download the SWB.enz connection file
- Download the file and open it with *EndNote*. *EndNote* will open the detail window with the connection details. Close this windows and restart *EndNote*. The Connection file will now appear in the list of online ressources.
Online search in EndNote (3)

Drawback: Limited search options

Note:
- Detailed options when searching directly in the database make the online search inside EndNote only the second choice
- Search results are deleted after closing EndNote
Online search in EndNote (3)

Search results can be transferred to your local library by using the *Copy to Local Library* button.
Direct Export from Online-Databases
Direct Export

Almost all bibliographic online-databases have an export function. E.g.:

- *Web of Knowledge (Web of Science, WoS)*
- *PubMed*
- *Ovid databases*
- *EBSCO Host databases*
- *Google Scholar*
- *Library catalogues (e.g. SLUB Dresden, SWD)*
Direct export from WoS (1)

**WEB OF KNOWLEDGE℠** DISCOVERY STARTS HERE

- **WoS** is an interdisciplinary portal
- **Range of subjects:** Medicine, Science, Social Sciences, Technology, Humanities and Art
- **10 000 scientific journals indexed with ca. 37 million indexed articles**
Direct export from WoS (2)

1. Search in WoS
2. Click Button *Save to EndNote*
3. Select *Open with ResearchSoft Direct Export Helper* (default value)
4. Reference is automatically opened in Endnote and moved into the group *Imported*
5. Import PDF-files using the *Find Full Text* function
**Export from EBSCO Host databases**

*EBSCO Host* is a provider (=search interface) for different scientific databases, for example

- Academic Search Complete
- PsycInfo
Export from EBSCO Host databases

1. Intermediate storage of references in *Folder*
2. *Export* button
3. Export as a ris-file
4. Can be opened with EndNote
Export from Ovid databases

- OvidSP is a database provider offered by Wolters Kluwer
- It allows for access to databases like
  - Biological Abstracts
  - CAB Abstracts
  - INSPEC
Export from Ovid databases

1. Select search results
2. Select **Export**
3. Open the generated cgi-file with Endnote
PubMed

*PubMed* contains the medicinal database *MEDLINE*, which indexes 4600 biomedical journals and e-books and contains ca. 21 million citations.
Export from PubMed

1. Select search results
2. **Send to** - Citation Manager - create file
3. Select **Open with EndNote X7**
4. Search results are imported
SciFinder (Chemical Abstracts)

SciFinder is the biggest information resource for chemistry and related fields. It contains 34 million references from 10,000 journals, patents, books, conference proceedings, and dissertations. Additionally, it offers information about 70 million chemical substances and 63 million protein/nucleotide-sequences.
SciFinder

1. Select search results and choose **Export**
2. Export as ris-file
3. Open ris-file with EndNote
Export from Google Scholar (1)

(1) Export is only possible for single search results
(2) Activate export to EndNote in the Google Scholars settings
Export from Google Scholar (2)

1. Select **Import into Endnote**
2. Open the enw-file with Endnote
Import PDF files

- Helpful tool
- Import a single PDF file or a folder containing PDF files
- EndNote automatically „unpacks“ the PDF and adds
  - Bibliographic data
  - Attachment (PDF) / Full text

Note:
Metadata extractions only works when the PDF file contains a DOI (Digital Object Identifier)
Import PDF-files

• *File/Import File* or *File/Import Data*

• Select Import Option: *PDF*
Fulltext
Attach PDF files (1)

1. Save PDF file locally
2. Paper clip button or \textit{References/File Attachements/Attach File}
3. Paper clip symbol appears in the display
4. PDF is attached
5. PDF is stored in the EndNote data folder: \\
   /user/documents/MyEndnotelibrary.Data/
Attach PDF files (2)

- An unlimited number of PDF files can be attached to a single reference
- Multiple functions: Print, Save, Notes, Turn, Highlight, Full text
- Open PDF file with external viewer:
- Mail PDF file:
PDF highlighting and annotations

- PDF files can be highlighted and commented inside the EndNote PDF viewer.

- Note: Annotations and highlighted text are only visible inside EndNote -> does not appear when opening the PDF file with another reader.
Create links (1)

Create links between references and different files, e.g.:

1. Pdf fulltext as attachment
2. Image
3. PowerPoint-file
4. Excel file
5. Diagram
6. URL

Using the detail view:

References/Files
Attachments/Attach File

or
Find full text

- Works best when the IP-range of the University
- **Tip:** If EndNote fails to find a full text, search manually using the EZB (Elektronische Zeitschriftenbibliothek) or other search tools

1. Select reference(s)
2. **Find Full Text** (context menu) oder
3. Found full texts are listed in the **Found PDF** group
OpenURL Link

OpenURL is a service which checks for full text in the electronic ressources licensed by the university library. It can be activated in EndNote in order to improve the sucess of the *Check Full text function*.

Activate OpenURL service in EndNote:

a. *Edit / Preferences / Find Full Text*
b. Activate all possible options
c. Enter URL for the path to the OpenURL-Linker:
   „http://www-fr.redi-bw.de/links/?rl_site=slub&sid=info:sid/primo.exlibrisgroup.com:primo3-medline“ in the field *OpenURL Path*
Use OpenURL Link manually

1. Select reference
2. Select *URL/OpenURL Link* in the Context menu
3. Results are shown in browser window
Reference Organization
My Library

- Organization of EndNote libraries
- Categorization of references according to different criteria

1. Permanent groups
   - *All References* and *Trash* are always shown

2. Temporary groups
   - Automatically generated when executing certain commands
   - Deleted when closing EndNote or the library
   - E.g. *Imported, Unfiled*
My Library

(3) User defined groups
- Custom groups
- Smart groups
- Groups created from groups

(4) Online search
- Results of Online-searches from EndNote
- Overwritten when executing a new search
- Possible with lots of different databases (=Connection Files)
Grouping of references (Groups)

Note:

*Groups* are subsets of the total set of *(All References)*. *Groups* appear under *My Groups* in the group window. *Groups* are created individually.
Grouping of references (Groups)

- Thematical groups
  - Recommended when writing scientific papers
    - Introduction
    - Materials/Methods
    - Discussion
    - Subject 1
    - Subject 2
- References of an author
- References of a workgroup
Grouping of references (Groups) (2)

(1) Custom Groups
- Defined, fixed groups
- Manual assignment

(2) Smart Groups
- Dynamic groups
- Based on search queries
- Automatically updated
Grouping of references (Groups) (3)

(3) Groups created from groups

- Combination of other groups (both custom and smart groups)
- Combination based on boolean operators: union, intersection or complement of sets
Creation of Custom Groups

(1)
- Right mouse button
- Create new group
- Enter name
- Adding references with drag and drop

(2)
- Select reference(s)
- Right mouse button
- Add References To / Create Custom Group
Smart Groups

- „Intelligent“ groups
- Dynamically generated
- Use with keywords: E.g. sort by „very important“, „important“
- Another possible use: Create a group with all references by a certain author
- Can be created in different ways
Create Smart Groups (1)

(1) **My Groups / Create Smart Group**

(2) Search window appears

(3) Enter search queries used to define the smart group

(4) Name group
Create Smart Groups (2)

Different way:

- In the search window of the library
  1. Start search
  2. **Options / Convert to Smart Group**
  3. Enter group name
Create Groups from groups

Right-click in the group window: Create from Groups...

• Select
  (1) Group name
  (2) Select groups to combine
  (3) Define boolean operators
Create group sets (1)

- Higher-level groups
- Contain individual groups (both custom and/or smart groups)

1. Menu *My Groups / Create Group Set*

2. Name *Group Set*

3. Fill Group Set by Creating new groups or by drag-and-dropping existing groups
Create Group Sets (2)

- The **Unfiled** group contains all references which are not part of a different groups

**Note:** To check which groups a reference is part of, select the reference and choose **Record Summary** in the context menu. References can be part of multiple groups.
Delete groups and references

(1) Delete references

from Custom Groups

Only group membership is deleted

References is still available under „All References“

from Smart Groups/Group

Reference is moved to the trash!

Restore references into smart group is possible (Restore to Library)

(2) Delete groups

- Deletes groups, but not the references
- Cannot be undone!
Find duplicates (1)

Edit / Preferences / Duplicates

Control for duplicates is automatically applied with the default values.

Edit default values
Find duplicates (2)

(2) References / Find Duplicates

- Compare potential duplicates (differences in blue)
- Select which record should be kept
Merge two databases

(1) File / Import File

- Select import option *EndNote Library*
- Prevent creation of duplicates by choosing *Discard Duplicates*
Export and Publication
✓ Export libraries
✓ Cite While You Write (CWYW) & WORD
✓ Edit Citation styles (output styles)
✓ Export libraries
Export libraries

- **File/Export**
- Output style
  - **EndNote Export** for export to other citation management software
  - **BibTeX Export** for LaTeX users
✓ *Cite While You Write (CWYW)*
Cite While You Write (CWYW)

- Dynamical export of citations
  - in WORD
  - in other word processors
- Automatic generation of bibliographies
- Many different formats possible
- Insert citations from both WORD and EndNote
- Citations and bibliographies are dynamic: Style can be changed at any moment

Tip:

Both WORD and the EndNote Library have to be open!
Close all non-necessary libraries
Cite While You Write in WORD

- Installation of an *EndNote* Plugin in WORD
- Adds EndNote X7-ribbon
Cite While You Write in WORD

(1) Insert Citation / Find Citation

(2) Search windows opens

(3) Search library by
   (1) Author
   (2) Keywords
   (3) Journal name ...

(4) Select reference and click on Insert

(5) Citation and bibliography entry are generated
Cite While You Write in WORD

Additional options when inserting references:
• Selecting and inserting multiples references
Cite While You Write in WORD

Additional options when inserting references:

• **Insert & Display as: Author (Year):** For use when mentioning the author in the running text. E.g. John Smith et al. *(Citation)* postulate that ...

• **Insert in Bibliography Only:** No citation is inserted, reference is only included in bibliography
Create Footnotes in WORD

(1) Insert footnote
(2) Move cursor to footnote
(3) Insert Citation / Find Citation

Some citation styles are not recommended for use with footnotes!
Cite While You Write in EndNote

1. Move Cursor in Word to desired position
2. Chance to EndNote
3. Select reference in EndNote and click on *Insert Citation*
Insert page numbers

(1) Page numbers are not stored in EndNote
(2) *Edit & Manage Citation(s)*
(3) Enter page numbers in the *Suffix* field: e.g. “, p. 43.”
Change citation style

The citation style can be changed at every time by using the drop down menu in Word. Citations and bibliography are then reformatted automatically.
This function converts all citations and the bibliography to plain text, which you can edit with Word.

Use this function if you share your document with someone who doesn’t have your EndNote library or to manually edit citations or bibliographies.
Structured bibliographies

• Sorting the bibliography to according to document types or customized criteria (e.g. primary/secondary sources or sources/further reading)

• Can also be used to create bibliographies for each chapter
Other programs

• Powerpoint

• **Insert Citation**: (Martin de las Mulas et al., 2002)


• **No bibliography in available in PowerPoint document**

• **No dynamic formatting**: Insertion as plain text
Edit citations styles (output styles)
**Style preview**

- Select style in the EndNote drop down list
- Select a reference
- Preview is shown in the Preview Tab
Output styles

• Endnote offers more than 5500 output styles for formatting citations and bibliographies
• File Format: *.ens (EndNote Styles)
• The standard installations only contains the 100 most popular styles
• Additional styles can be downloaded: http://www.endnote.com/support/enstyles.asp
Output Styles

- Search for specific styles and download on the EndNote website

ENDNOTE OUTPUT STYLES

ENDNOTE OFFERS MORE THAN 5,000 BIBLIOGRAPHIC STYLES

Download an archive of all available styles.

Click the column heads in the table below to sort all styles by style name, citation style, discipline, or date.

USE THE STYLE FINDER BELOW TO SEARCH FOR A STYLE NAME AND/OR CITATION STYLE AND/OR PUBLISHER.

<table>
<thead>
<tr>
<th>Style or Journal Name</th>
<th>Citation Style</th>
<th>Discipline</th>
<th>Date</th>
<th>Download</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hepatobiliary &amp; Pancreatic Diseases International</td>
<td>Superscripted Number</td>
<td>Surgery</td>
<td>2013-08-13</td>
<td>DOWNLOAD</td>
</tr>
<tr>
<td>Journal of Orthopaedic Research</td>
<td>Superscripted Number</td>
<td>Orthopedics</td>
<td>2013-08-01</td>
<td>DOWNLOAD</td>
</tr>
<tr>
<td>Journal of Applied Geophysics</td>
<td>Author-Year</td>
<td>Geology</td>
<td>2013-08-01</td>
<td>DOWNLOAD</td>
</tr>
<tr>
<td>Neuropathology and Applied Neurology</td>
<td>Non-superscripted Number</td>
<td>Neurology</td>
<td>2013-08-01</td>
<td>DOWNLOAD</td>
</tr>
</tbody>
</table>
Output Style Manager

• **Edit / Output Styles / Output Style Manager**
• Create an individual style:
• Select an existing style as starting point: **Style**
  **Info Preview & Edit**
• Edit & save style
Edit style

• Check for style recommendations/regulations of your journals/university/institute/supervisor

• Edit different categories
  a.  Citations
  b.  Bibliography
  c.  Footnotes
  d.  Figures & Tables
Page numbers & Journal titles

- About this Style
- Punctuation
- Anonymous Works
- Page Numbers
- Journal Names

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. 123-25)
- Show the full range of pages (e.g. 123-125)
- Show only the first page for journals, full range for others

Journal Name Format:
- Use full journal name
- Abbreviation 1
- Abbreviation 2
- Abbreviation 3
- Don't replace

- Abbreviate journal articles only
- Remove periods
Edit citations

- **In-Text Citations**
  1. **Templates**
  2. **Insert Field**
     
     e.g.: **Author, Year.** Add commas or semicolons by Hand
Edit citations

- **Author Lists/Author Name**: How/how many authors are shown in citations
Edit bibliography (1)

• Define bibliography pattern
• Add new reference types
  – Book
  – Online Database
  – Personal communication...
Edit bibliography (2)

Enter fields using the *Insert Field* button.
Enter special characters (e.g. commas, parentheses) by hand.
Important rules:

- **Dependance**: Characters or Punctuations which are directly connected to an EndNote field (e.g. author) are only shown if the field is not empty.
- **| (Forced Separation)**: Ignores Dependance (e.g. author|,)
- **non breaking space (diamond symbol)**: joins two parts together, creates dependance
- **^**: Singular/Plural forms (e.g. (Ed.)^ (Eds.))
Edit bibliography (4)

Sort order of the bibliography
Edit footnotes

Three possibilities to determine the footnote style:

• Define your own templates
• Use formatting of bibliography entries
• Use formatting of citations
Edit Figures & Tables

• Placement of figures and tables
  – In the text
  – At the end of the document
  – Placement of the caption
Save style changes

(1) Exit Output Style Manager: 

(2) Save changes

(3) Tip: Save the edited style under a new name
Online & Collaborative reference management
Compressed Library

(1) For Backup-purposes (Recommended!)
(2) For collaborative work

- Send by mail is possible
- Compressed format
- Save with/without attachments

(1) File / Compressed Library
(2) Save locally
(3) Open with File / Open / Open Library /... .enlx
Teamwork and mobile work with EndNote Web

- Bidirectional synchronization between EN Desktop- and Online-Version
- Access from everywhere using a web browser
- Menus in different languages (English/German etc.)
- *EndNote Web* is well suited for collaborative work
EndNote Web

Disadvantages:

• Limited functionality
• No access to web-based libraries after leaving the institution licensing Endnote Web
• Account will be deleted after 1 year of inactivity
• No offline-editing possible
• More interference-prone (server problems, maintenance, stability of the internet connection)

Check first which functionalities are necessary for you!
Registration of EN Web

• One-time registration under https://www.myendnoteweb.com/
• Download of word plugin for CWYW-editing possible
Basic Functions of Endnote Web

References and groups

Groups

Attachements
Basic Functions of Endnote Web

Online Search:

Step 2 of 3: Connecting to Universität Johann Christian Senckenberg: Bibliothekskatalog

Online Search Results

Universität Johann Christian Senckenberg 1 - 10 of 15 results
(basil) in Any Field

Show 10 per page

Add to group...
- Geology
- My papers
- test
- [Unfiled]

New group

Author
Bonermann, Basil
Basic Functions of Endnote Web

Data entry or data import

New Reference

Bibliographic Fields:

Reference Type: Generic

Author:
Use format Last Name, First name. Enter each name on a new line.

Title:

Year:

Secondary Author:

Secondary Title:

Place Published:

Publisher:

Volume:

Number of Volumes:

Import References

Importing from EndNote?

File: Durchsuchen... Keine Datei ausgewählt.

Import Option: Select...

To: Select...

Import
Synchronization EN Desktop and Web

(1) Synchronization

- Adding references
- Deleting references
- Editing references
- Only custom groups are synchronized
- Synchronization can only be started from EN Desktop
Synchronization EN Desktop and Web

(2) Up to 5 GB of space

(3) First synchronization moves all references from EN Desktop to Web and vice versa. Additional synchronizations will update only changes to your database.

(4) Rules for attachments

• All attachments will be synchronized in both directions

• Deleted attachments will be synchronized again, if there are only deleted in one place

• In order to really delete an attachment the attachment has to be manually deleted both in EN Desktop and Web.
Synchronisation with Endnote Web

1. Edit / Preferences / Sync / Enable Sync
EndNote Web – Collaborative work

**Computer A**

**Situation**
Two different computers

**Computer B**

Select group for collaborative editing

Mutual adding of email-addresses

Allow read-only or read&write access
EndNote Web – Collaborative work

- Select group
- Enter e-Mail addresses
- Option: Read only / Read & Write

Add E-mail Addresses to 'Geolo'

Enter e-mail addresses. Use the Enter key to separate addresses.

- OR -

Select a text file with e-mail addresses separated by commas.

Read only ○ Read & Write

Note: Attachments are not shared, regardless of access privileges.

Apply

Close window.
EndNote Web – Collaborative work

- No sharing of attachments
- Shared groups are only synchronized for the original owner of the group, not for the invited collaborators
Information and Support
Additional support

Additional informations in the Internet

  1. EndNote Homepage
  2. User Forum
  3. Technical Support
  4. Online Tutorial – always available
  5. Webinar (live) with different subjects
  6. Handbook in different languages (both German and Englisch)

- [http://www.adeptscience.de/bibliographie/endnote/index.html](http://www.adeptscience.de/bibliographie/endnote/index.html) (German distributor)
  1. Technical questions
  2. Handbook in different languages (both German and Englisch)
  3. German webinars (gratis)
Questions?

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Cartoon von http://www.librarian-image.net/img07/