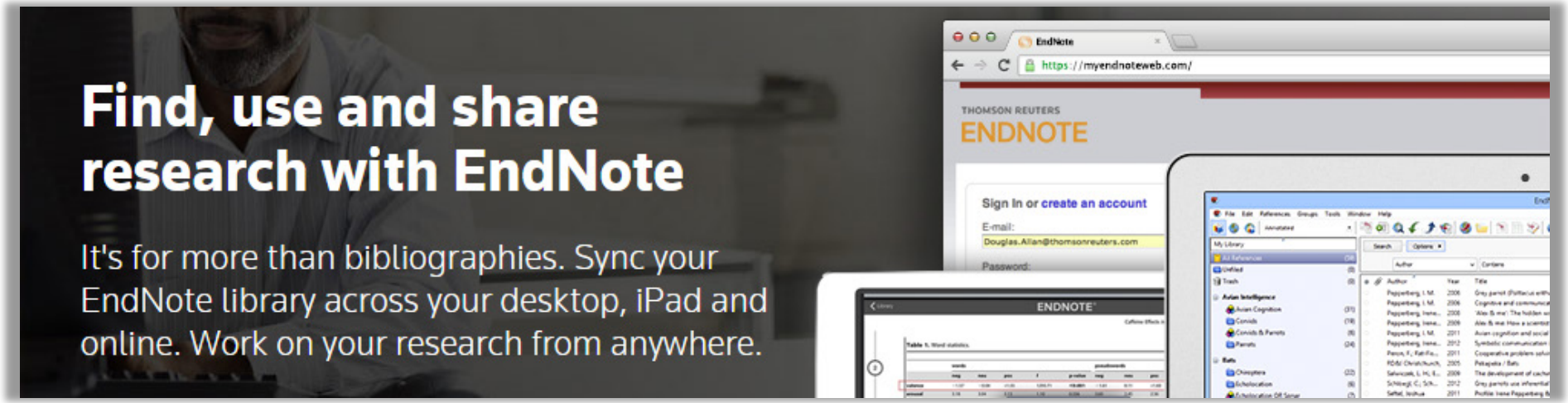
Autumn 2023

Literature Management with Endnote

Stephanie Hofmann & Bobby Neuhold



Screenshots www.endnote.com

Lib4RI

Lib4RI Training Series

- Module 1
  Searching Scientific Information
- Module 2
  Scientific Publishing: From Writing to Sharing
- Module 3
  Open Access & Copyright
- **Module 4**
  Literature Management with EndNote
- Module 5
  Getting Started with LaTeX
- Module 6
  Work on Your Own Project
- Module 7
  Research Data Management – The Basics

NEW
- Module 7⁺
  Load, Work & Plot Your Data Using Python, Pandas & Jupyter Notebook

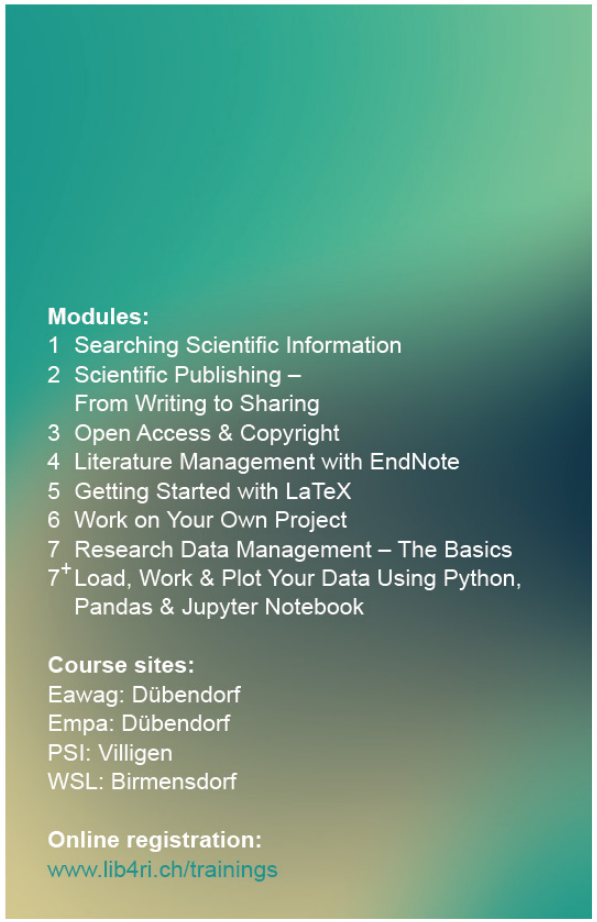
Library for the Research Institutes within the ETH Domain: Eawag, Empa, PSI & WSL

Lib4RI

Searching & Managing Scientific Information

Training series

Autumn 2023



Module 4 – Literature Management with EndNote

9.00 – 9.15 Introduction to Literature Management

9.15 – 10.45 EndNote Presentation & Live Session (Part 1)

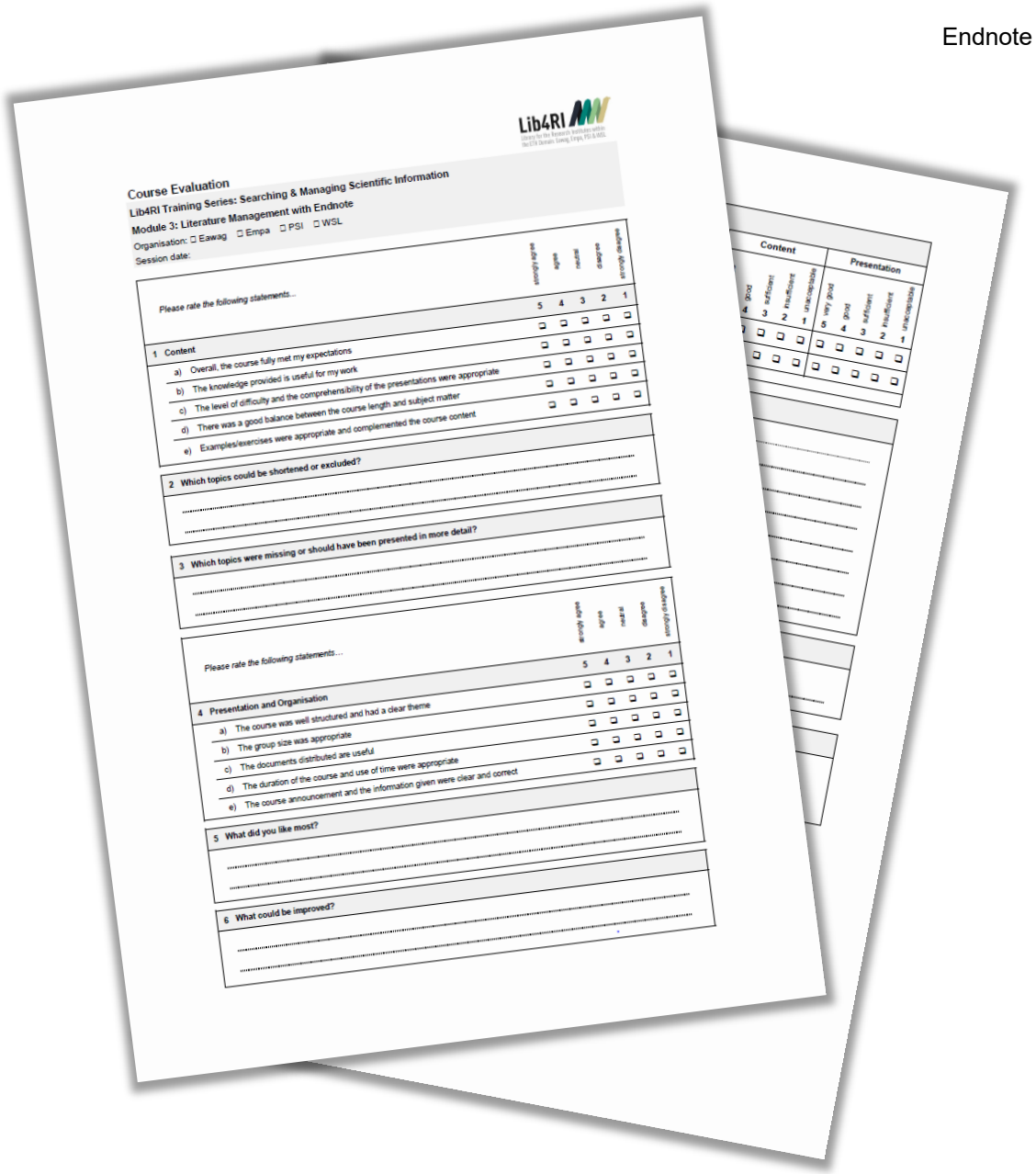
10.45 – 11.00 Break

11.00 – 12.30 EndNote Presentation & Live Session (Part 2)

Thanks for your feedback

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

The course slides and supplementary material are available online on our website at [www.lib4ri.ch > Learn > Trainings](www.lib4ri.ch)



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, CC BY-SA 2.0

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

RefWorks

Docear
The Academic Literature Suite

Bookends

EN
EndNote™

MENDELEY

SENTE 6

JabRef reference manager

zotero

Papers

BibDesk

citavi®

… and more

Common Reference Management Software

EndNote (formerly Thomson Reuters, since 2017 Clarivate Analytics)

- Work horse for literature management (1st release 1988)
- Full licence (desktop version PC & Mac) can be obtained via your IT Services allowing for shared library use of up to 200 (EN20) or 1000 (EN21) group members
- Online web clients (limited functionalities): New (EN21), Classic (EN20 & EN21) endnote.com/weblogin/
- iOS app

Zotero (open source)

- Desktop version (PC, Mac, Linux) with web connectors (Firefox, Chrome, Safari, Opera) and online web client (limited functionality)
- Free < 300Mb online storage (expandable $, Dropbox capable)
- www.zotero.org

Mendeley (Elsevier)

- Desktop version (PC, Mac, Linux) with web connectors (Firefox, Chrome, Safari, IE)
- Strengths in sharing / networking / online collaboration
- Free ≤ 2Gb, ≤ 5 private groups, ≤ 25 group members (cloud space expandable, $$)
- www.mendeley.com

Introduction to EndNote 20

EN's GUI

- Create a new library (11)
- Graphical User Interface (12)

Collect

- EndNote's built-in online search (16)
- Export / import after an external database search (19)
- Import metadata from PDFs (24)
- Manually adding & altering references (25)
- Find & attach full text PDFs (27)

Organise

- Building groups (31)
- Checking & Updating references (32)
- Finding duplicates (33)
- Searching references (incl. PDFs & annotations) (34)
- Backing up your library (35)

Cite

- Bibliographic output styles (37)
- Cite-while-you-write (MS Word) (42)
- Using journal abbreviations (46)

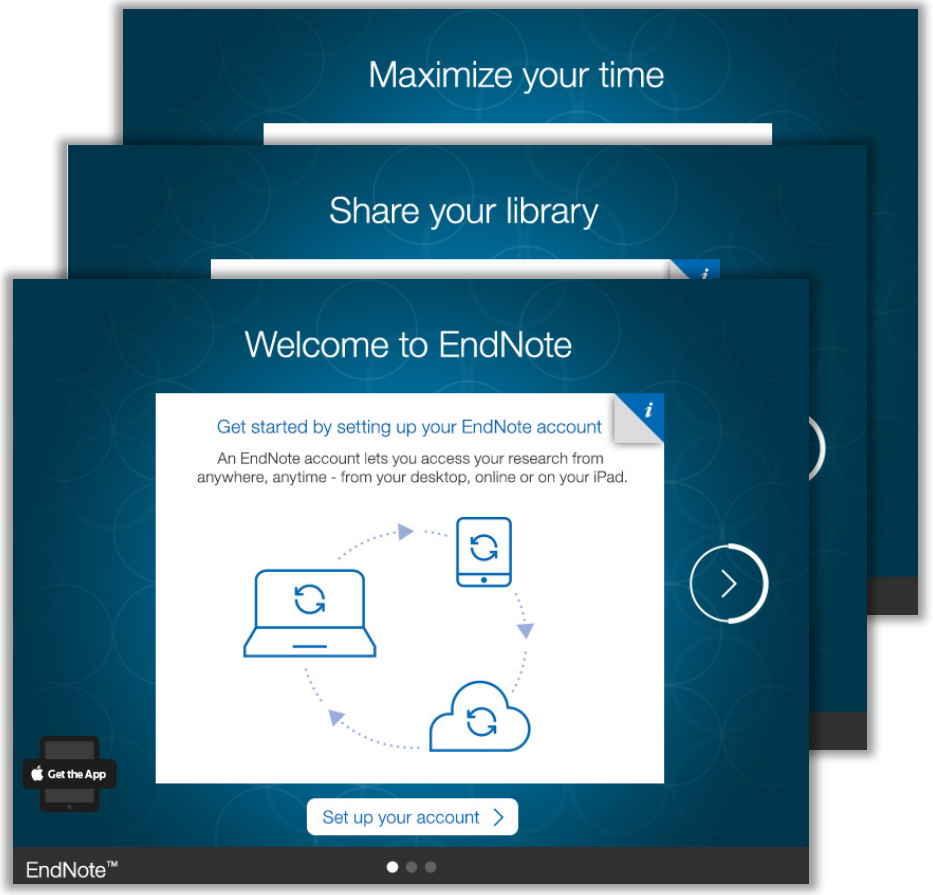
Share & Sync

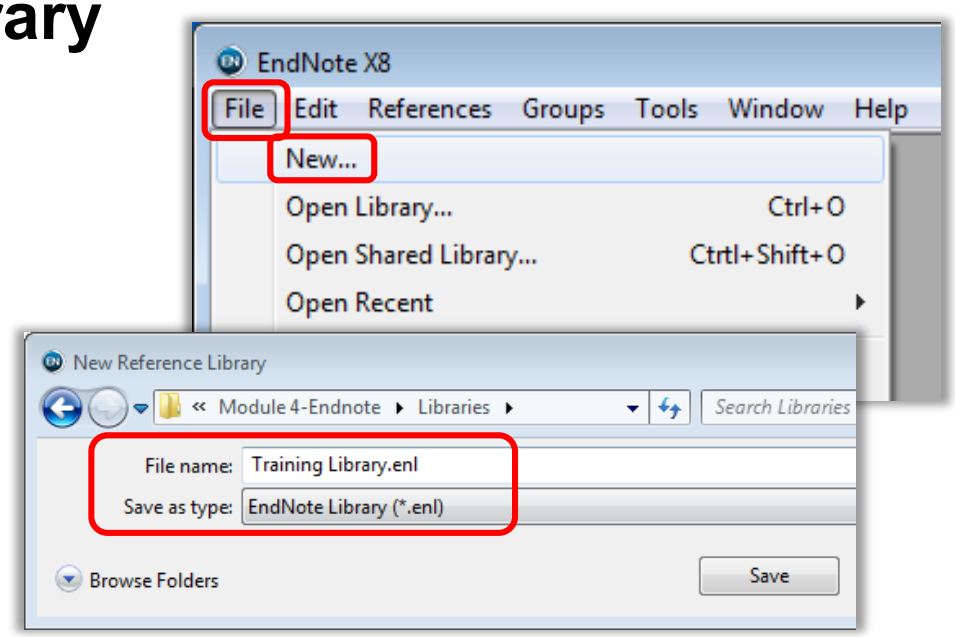
- Without EN Online Account (50)
  - Share references via E-mail
  - Share travel library via Word plugin
  - Share library as a compressed library or via servers
- With EN Online Account (53)
  - Sync between your devices
  - Share entire library
  - Share groups

Concluding Info, Help & Useful Links

- EndNote can do more (58)
- Is EndNote the right thing for me (59)
- User Guides & Tutorials, Support / Knowledge Base, Community, FAQ (61)

Create a New EndNote Library

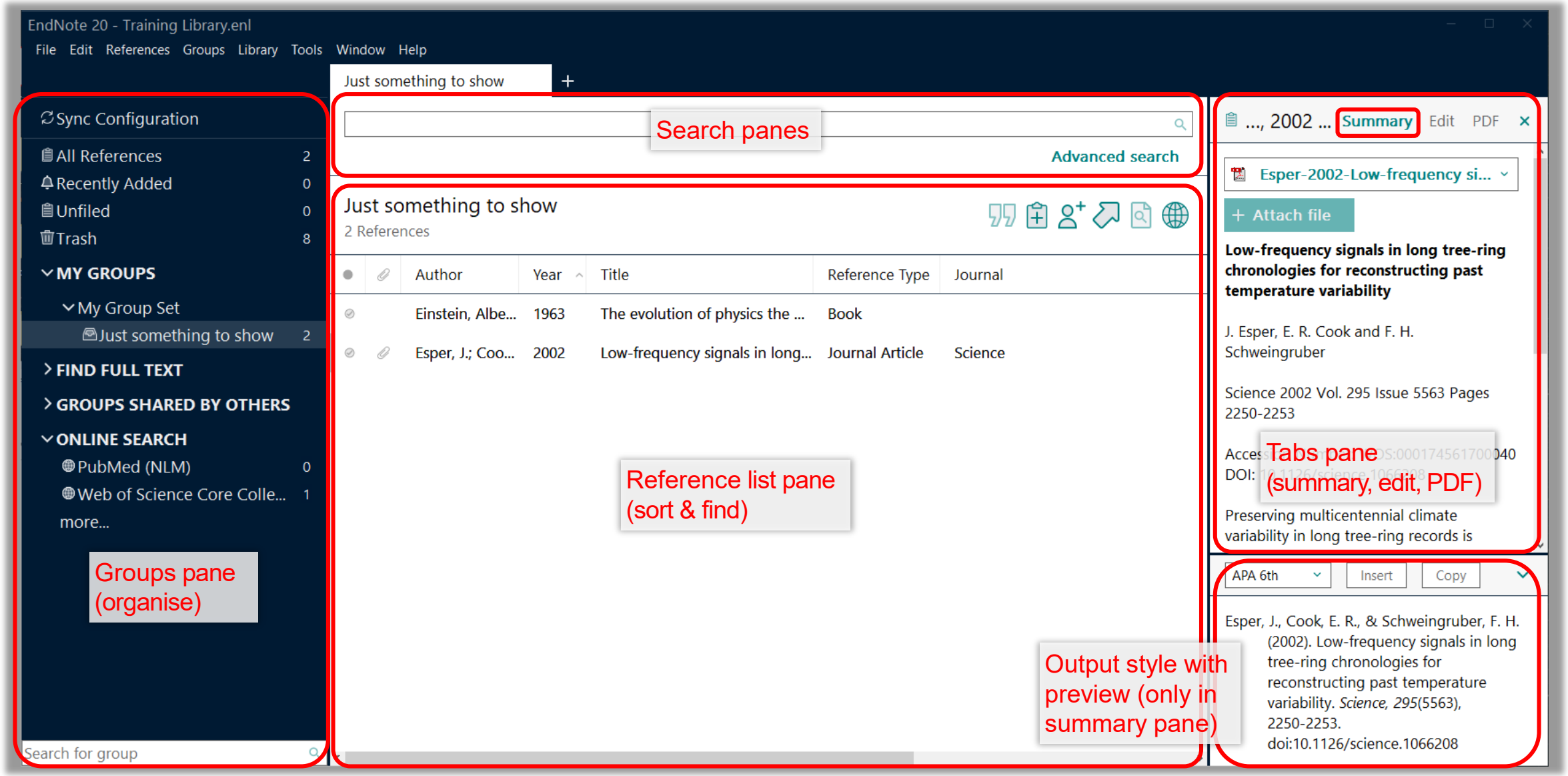




- Tip: EndNote generates an *.ENL file and a *.DATA folder that need to stay together.
- Tip: While the *.ENL file is the library with all metadata, the *.DATA folder is the default location for attachments and also contains library related indexing files.

When EN opens for the first time a welcome screen might ask you to setup an 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



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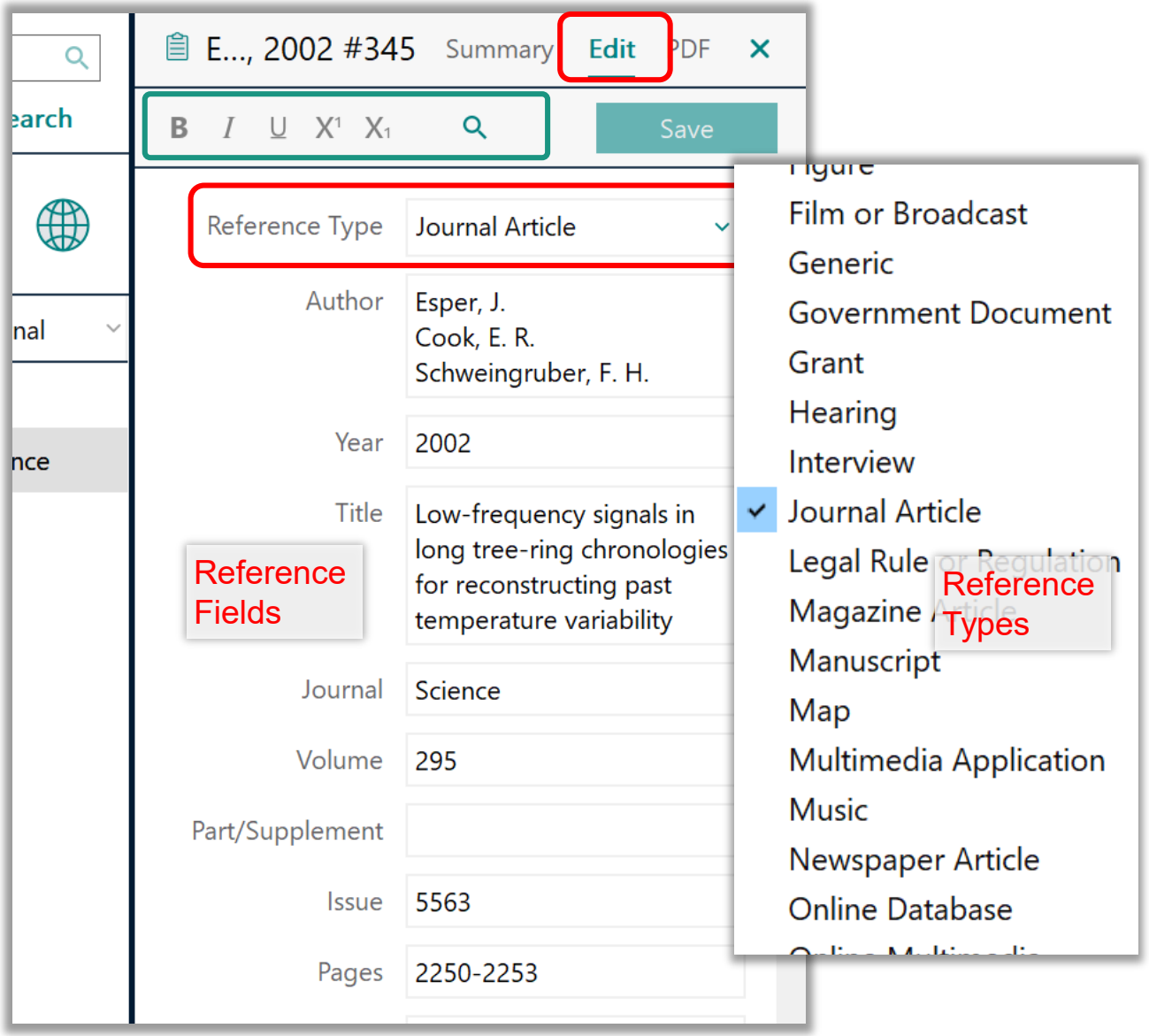
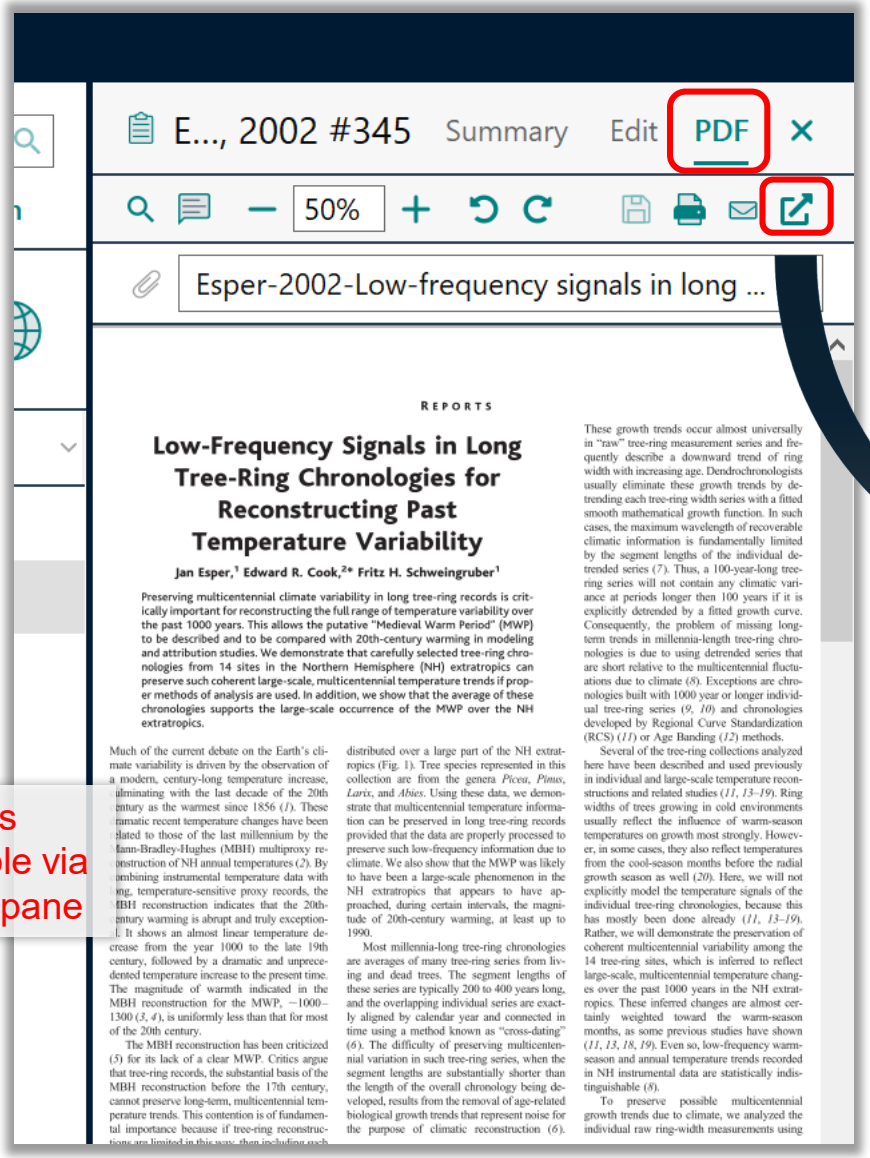


- Tip: Don't change the formatting here. It will overrule the formatting defined by the <Output Style>

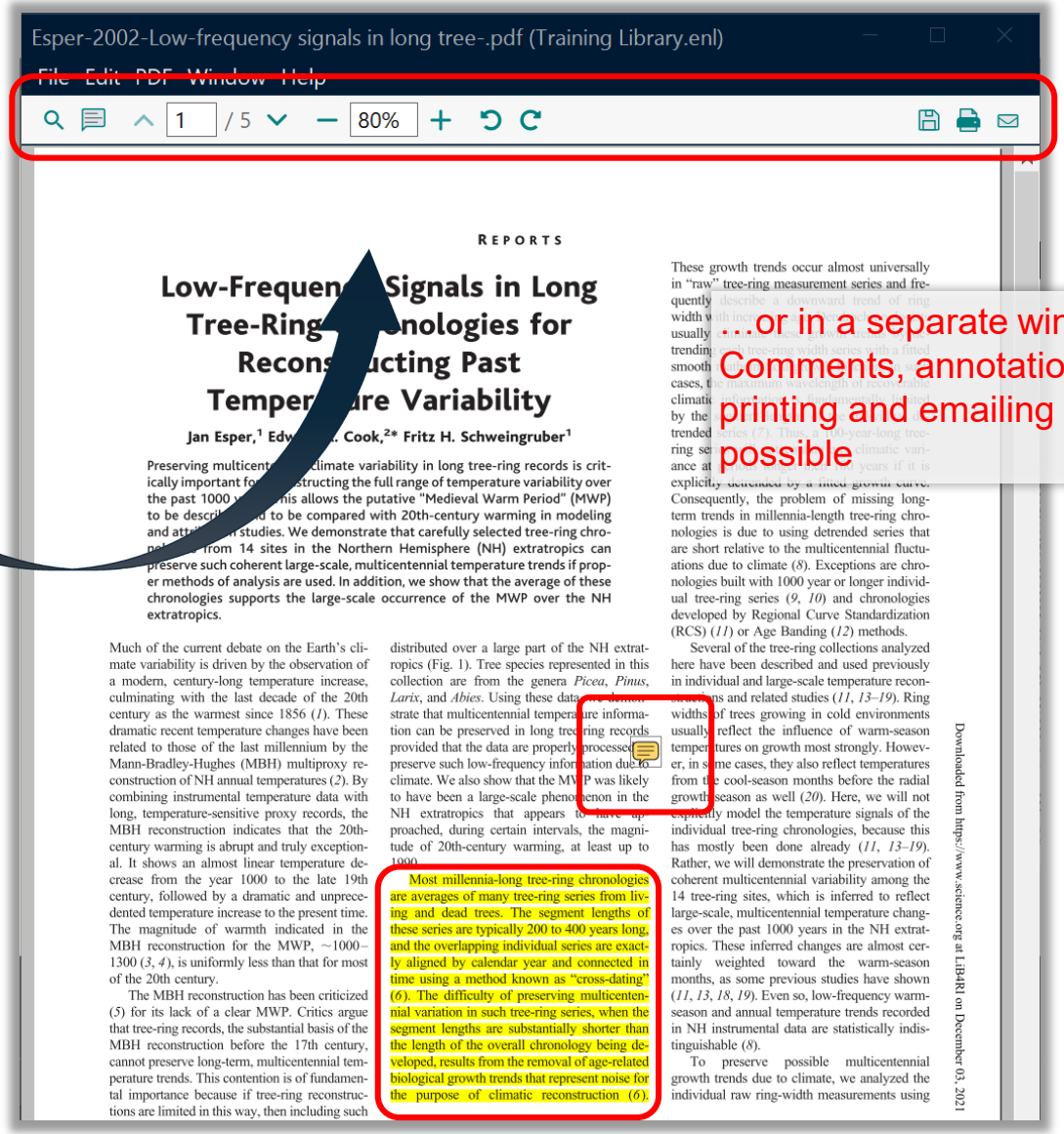
- Each reference is associated with a <Reference Type>, eg <Journal Article> and contains in its <Fields>, the metadata, eg <Author>
- Each <Output Style> uses this information to generate citations and a bibliography in your document

The Graphical User Interface – PDF Viewer

Endnote



… PDF is accessible via the tabs pane



…or in a separate window. Comments, annotations, printing and emailing is possible

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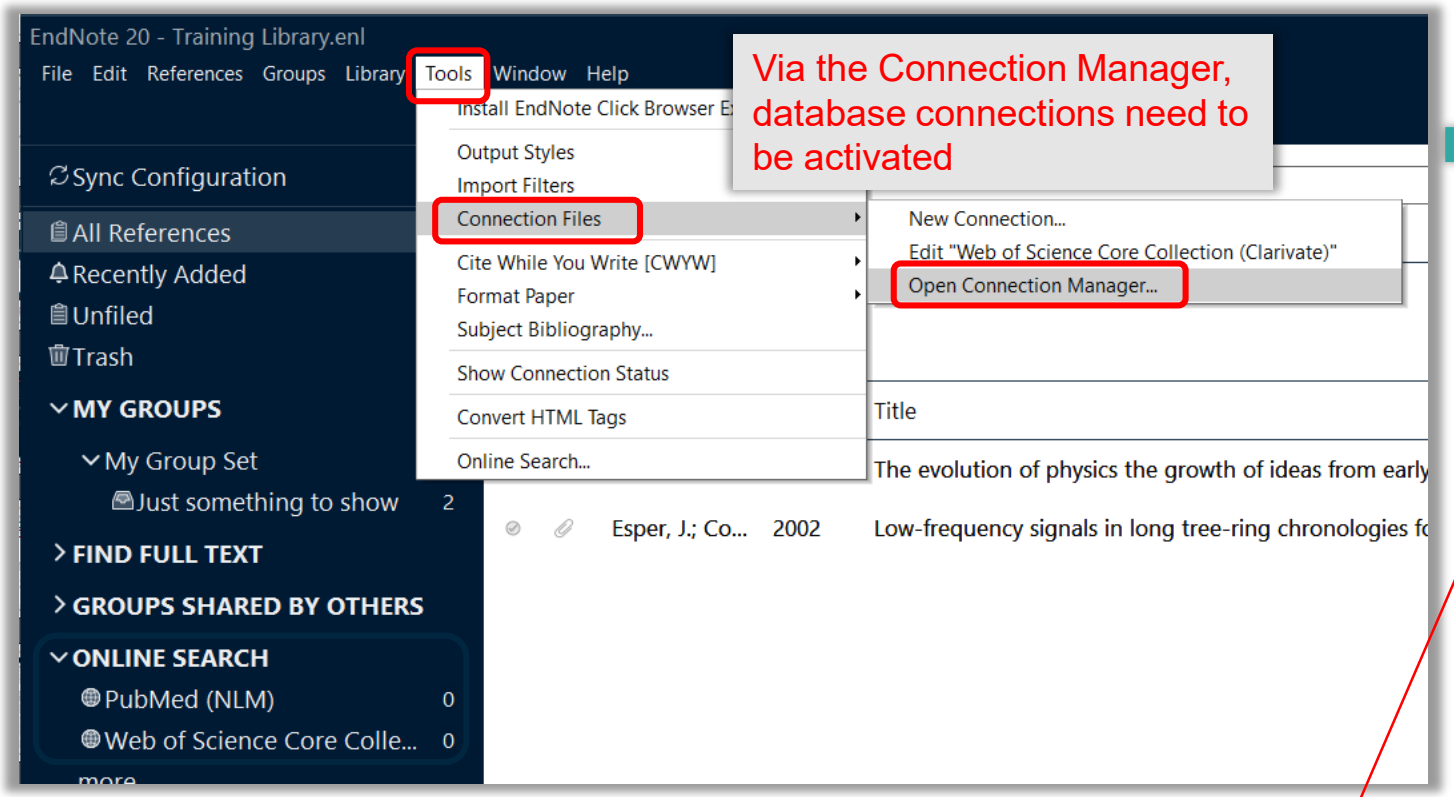
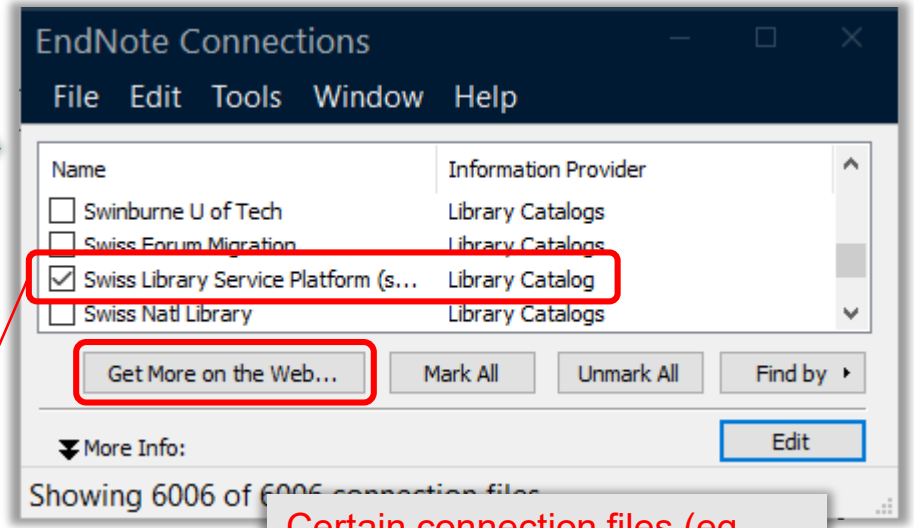
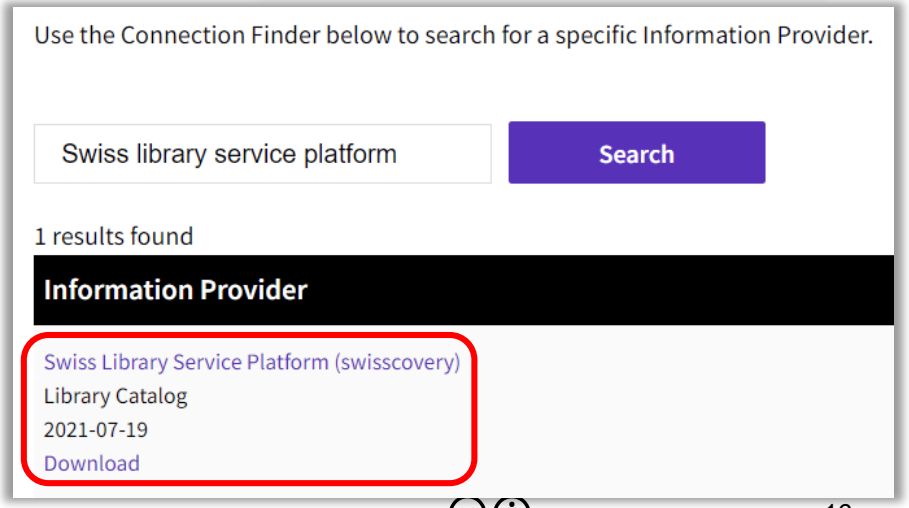
Collect Metadata – EN's Built-in Online Search & Connection Files



Via the Connection Manager, database connections need to be activated

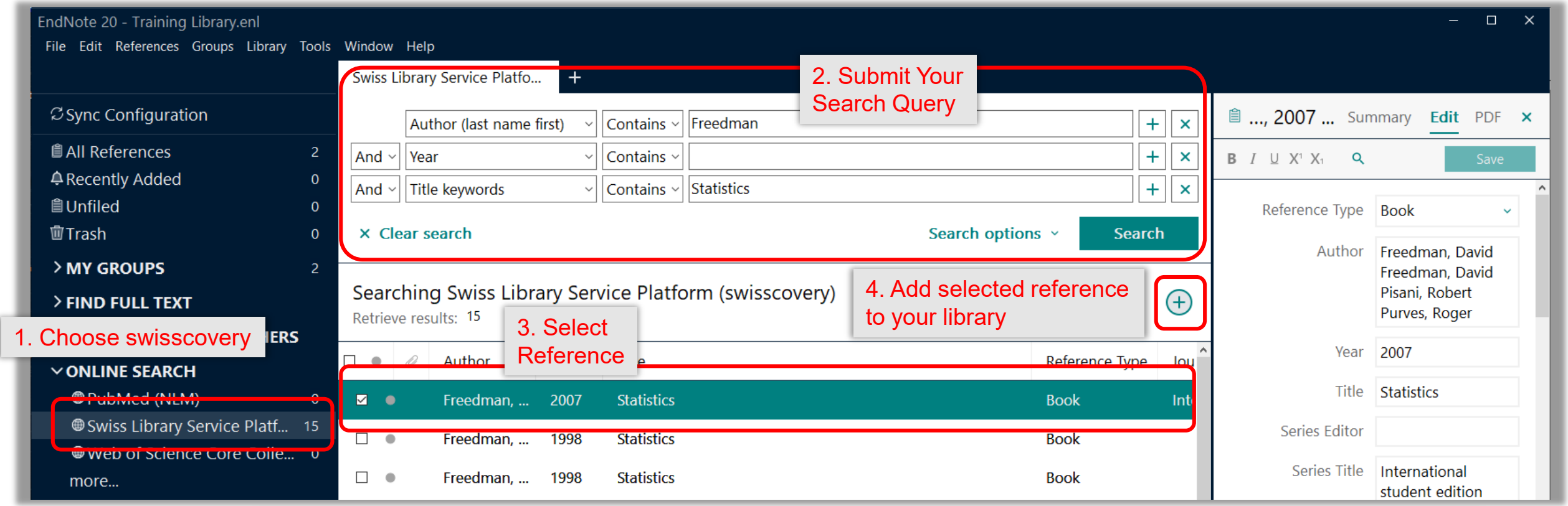


Certain connection files (eg swisscovery) need to be downloaded from the web and installed via double-click.

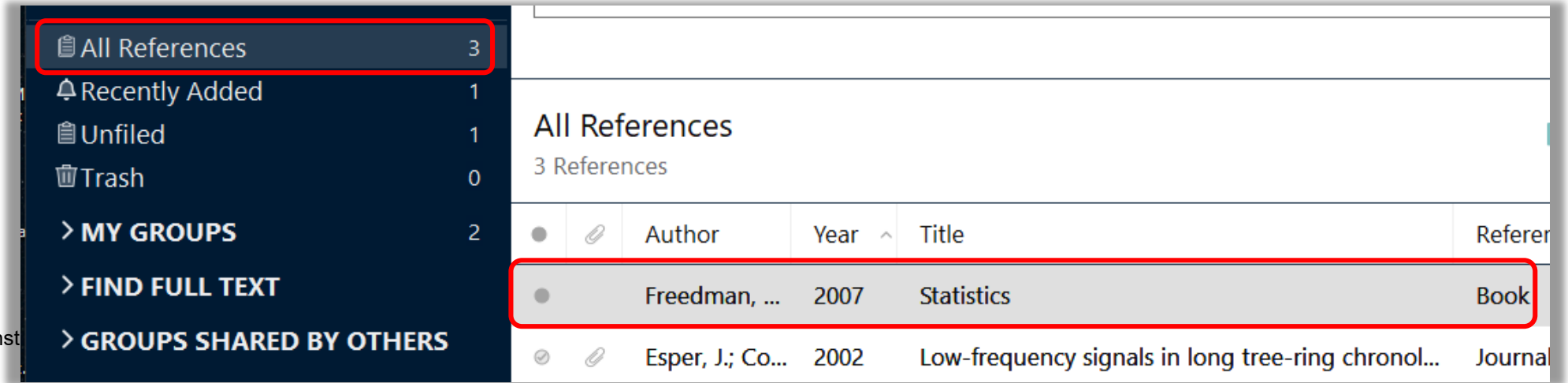


- By default, PubMed & Web of Science are activated; many library catalogues available
- Connection file to our library catalogue swisscovery. Scopus is NOT supported

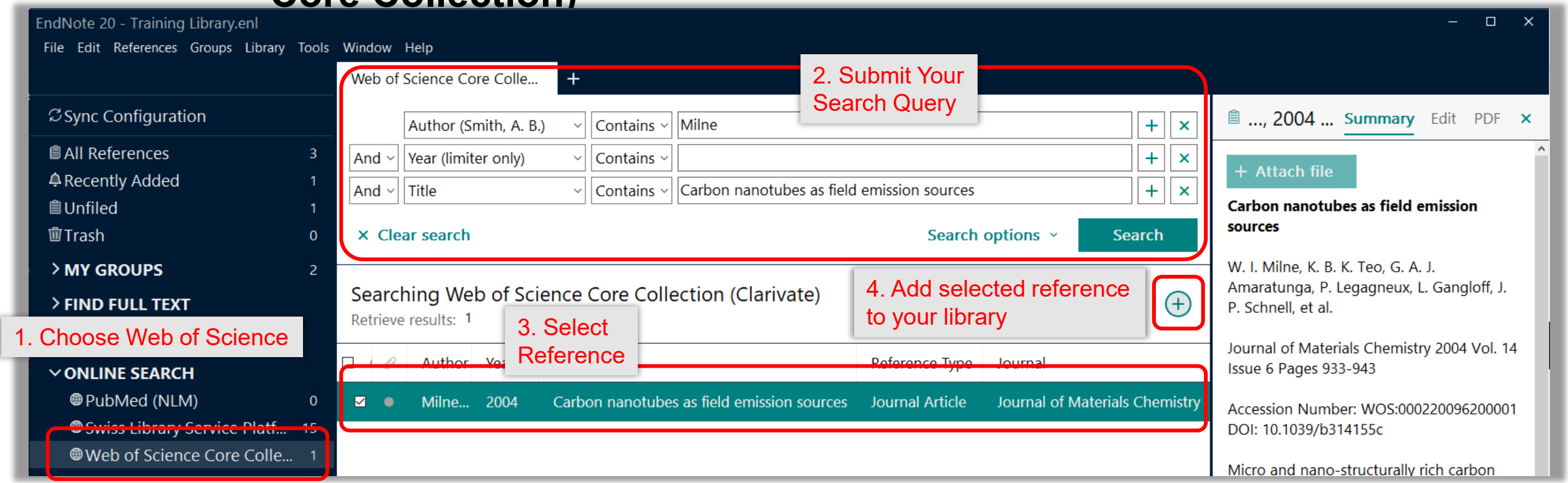
Collect Metadata – EndNote's Online Search (swisscovery)



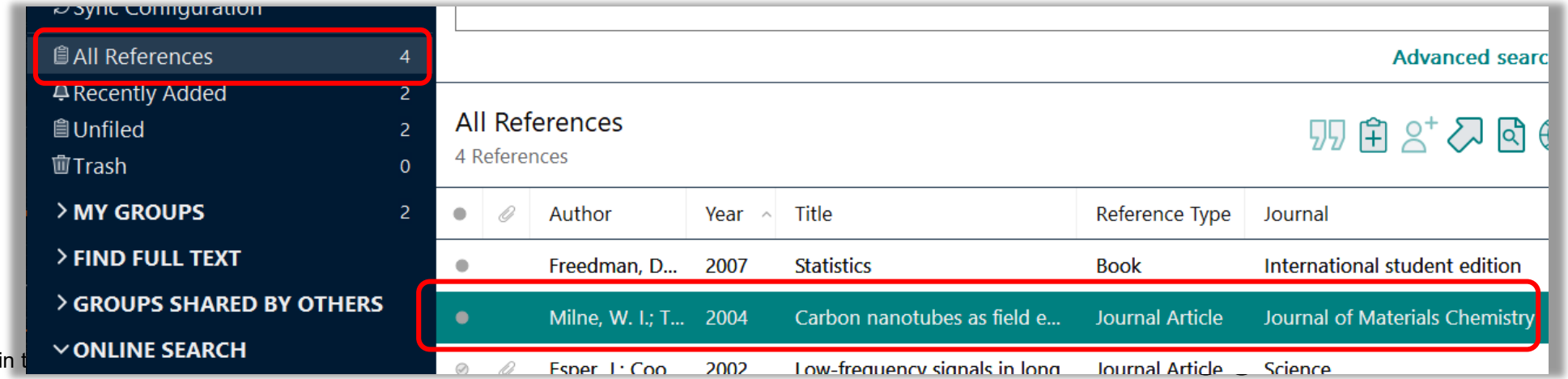
…et voilà



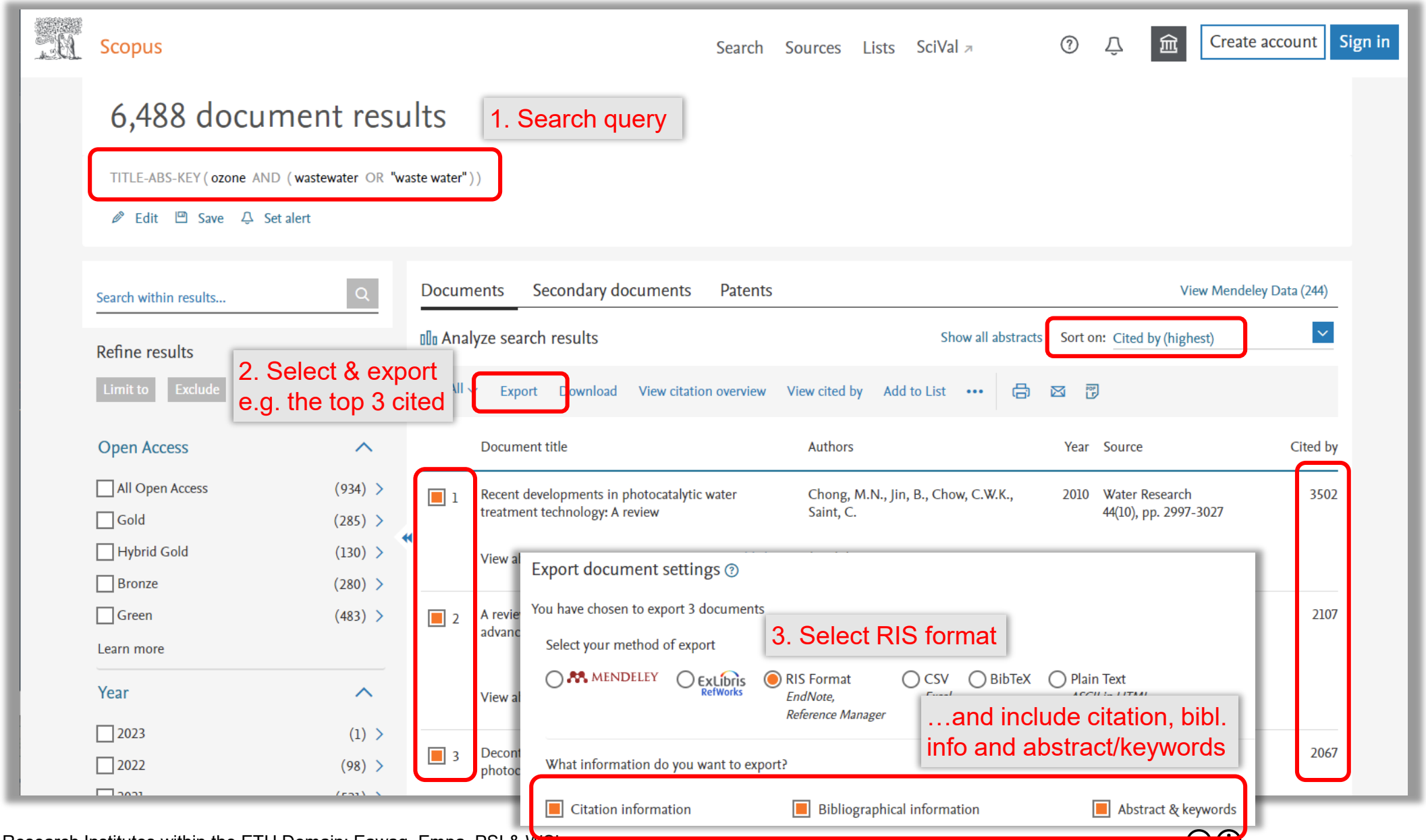
Collect Metadata – EndNote's Online Search (Web of Science Core Collection)



…et voilà

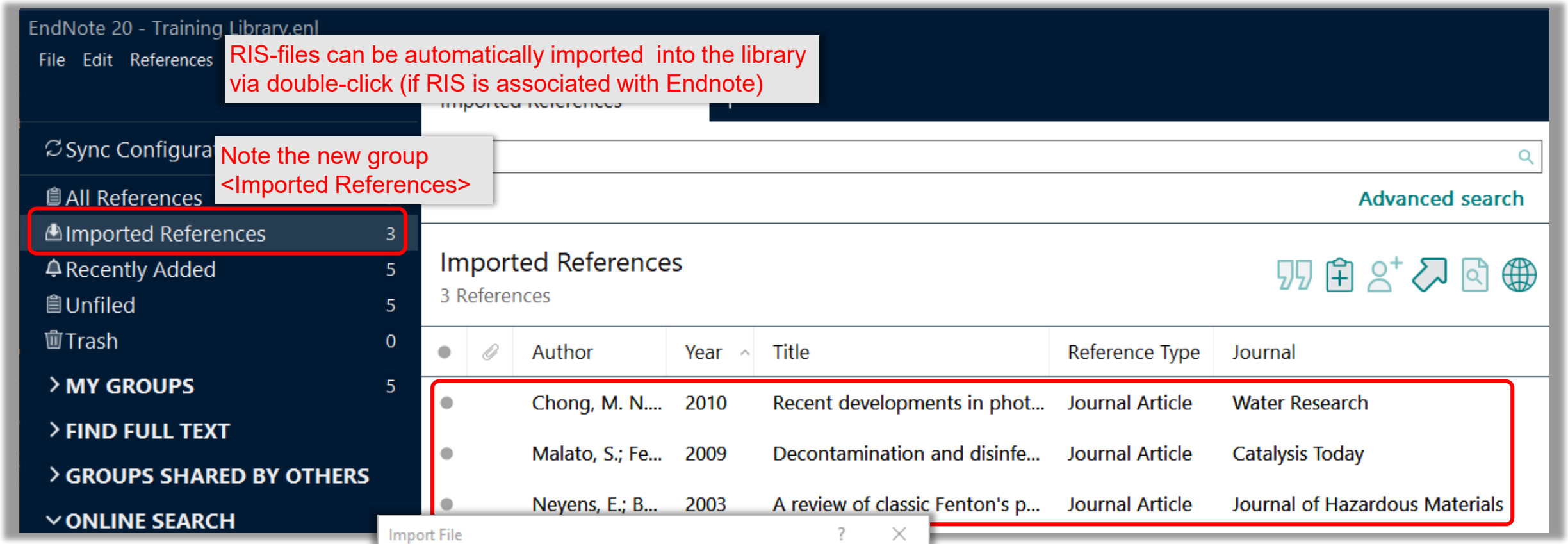


Collect Metadata – External Database Search & Import (Scopus)

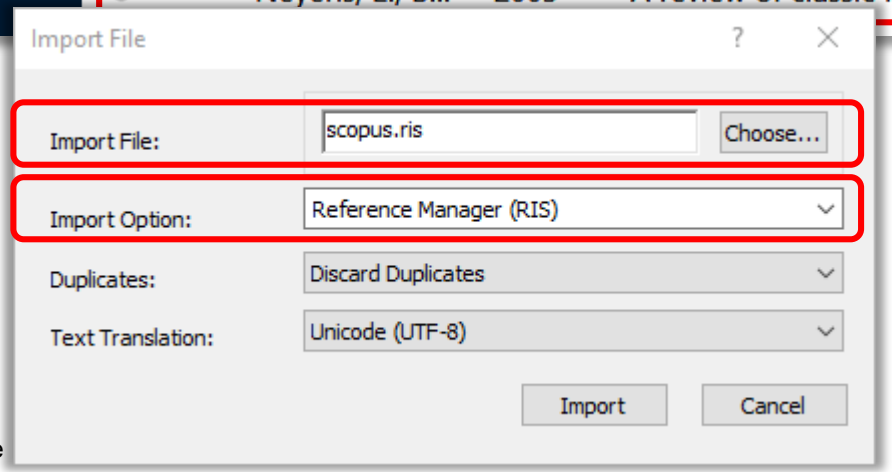


CC BY

Collect Metadata – External Database Search & Import (Scopus)

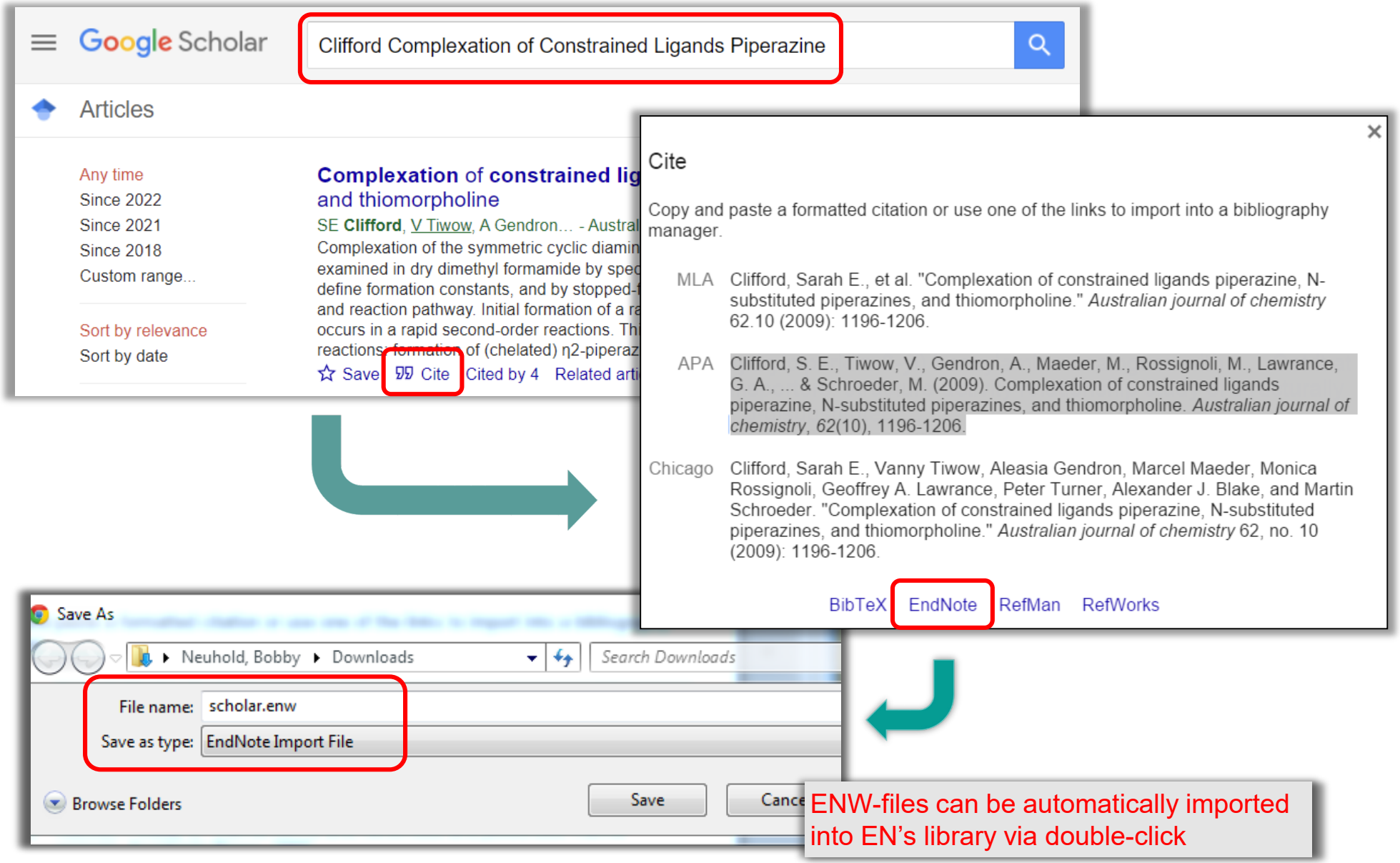


Or import the RIS-file manually via “File > Import > File” and the appropriate <Import Option>

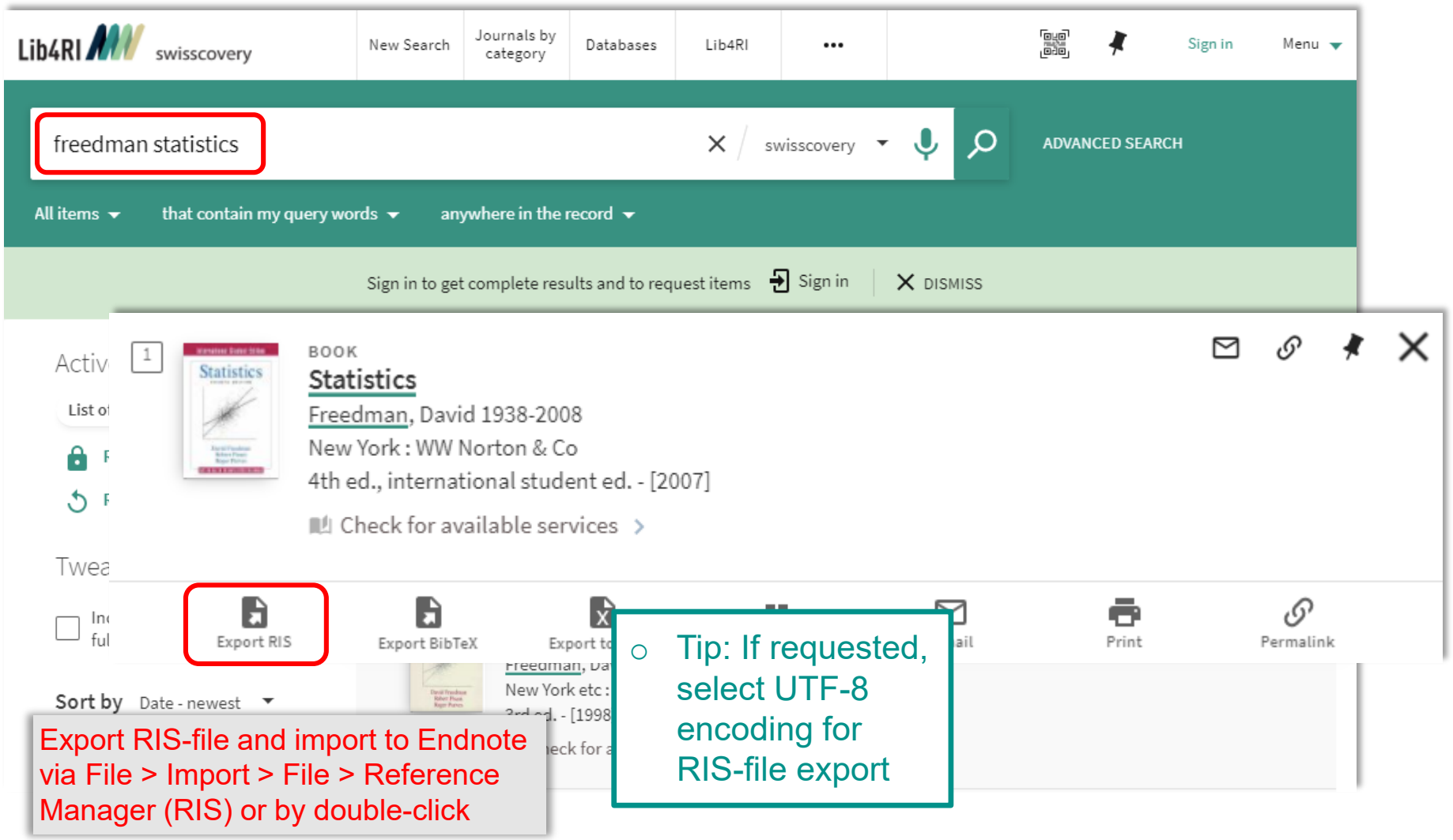


- Tip: Many other import options/filters are available and can be activated via “Tools > Import Filters > Open Filter Manager”

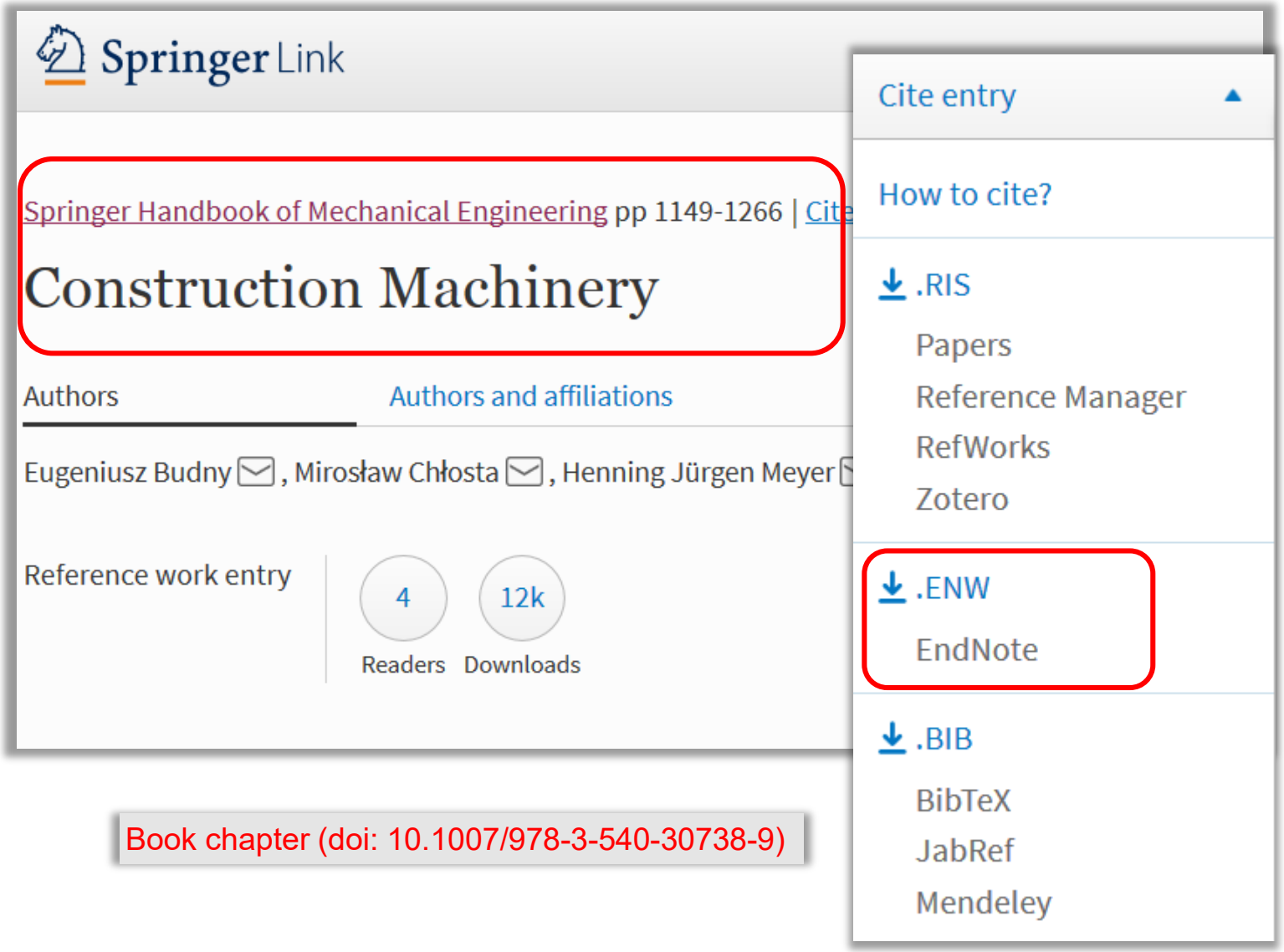
Collect Metadata – External Search & Import (Google Scholar)



Collect Metadata – External Catalogue Search & Import (swisscovery)



Collect Metadata – External Catalogue Search & Import (Publisher)

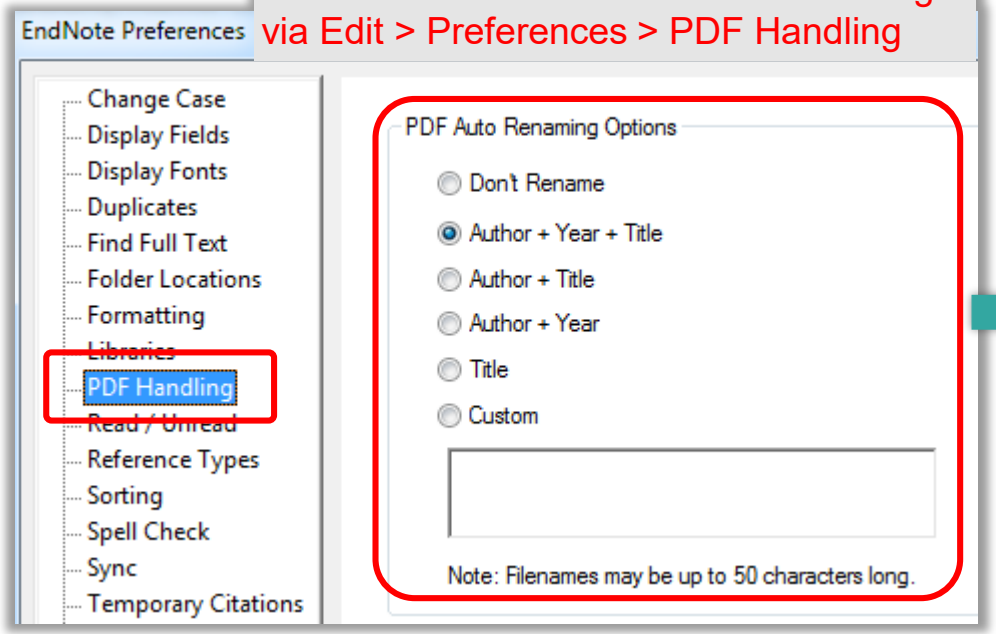


Book chapter (doi: 10.1007/978-3-540-30738-9)

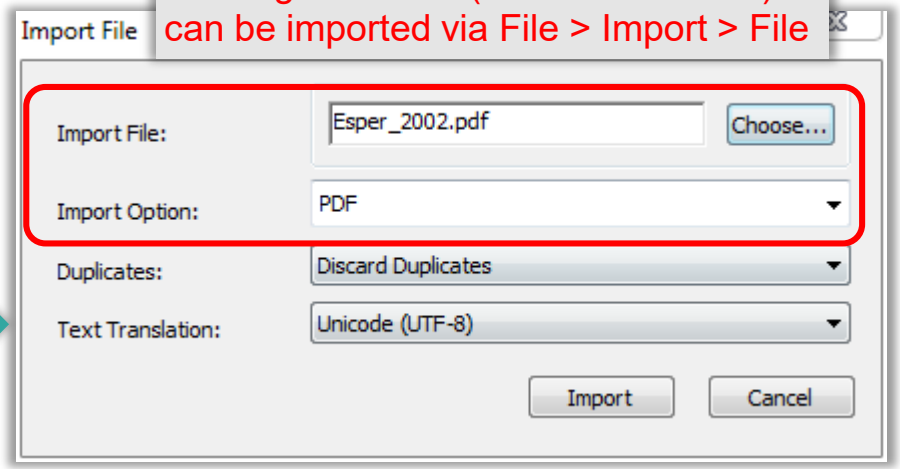
- Tip: Citations for book chapters are often best obtained via the publisher's website

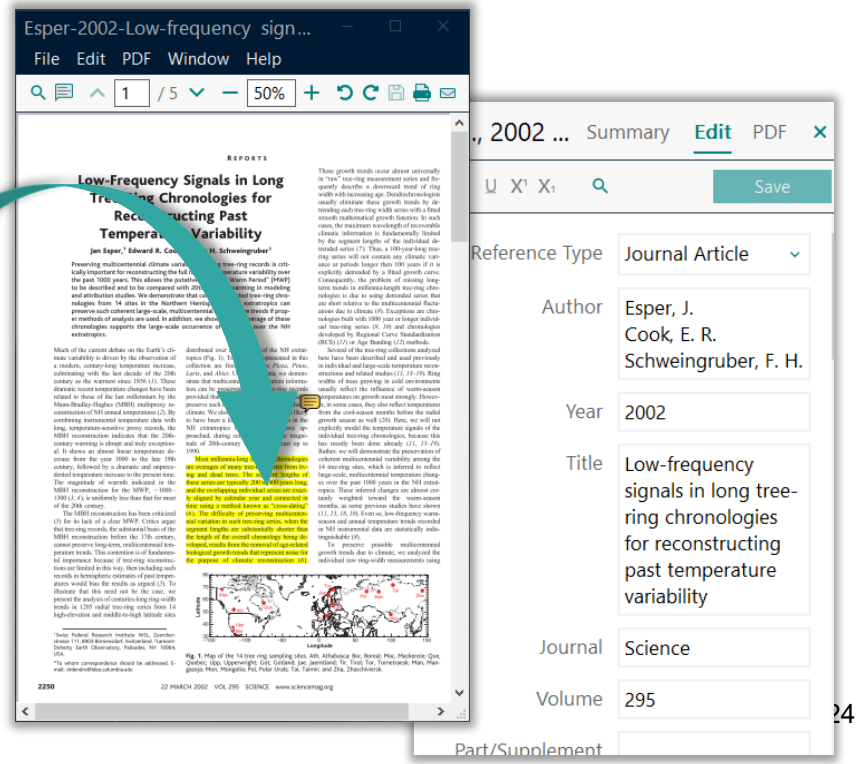
Collect Metadata – Extract Metadata from PDFs

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



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

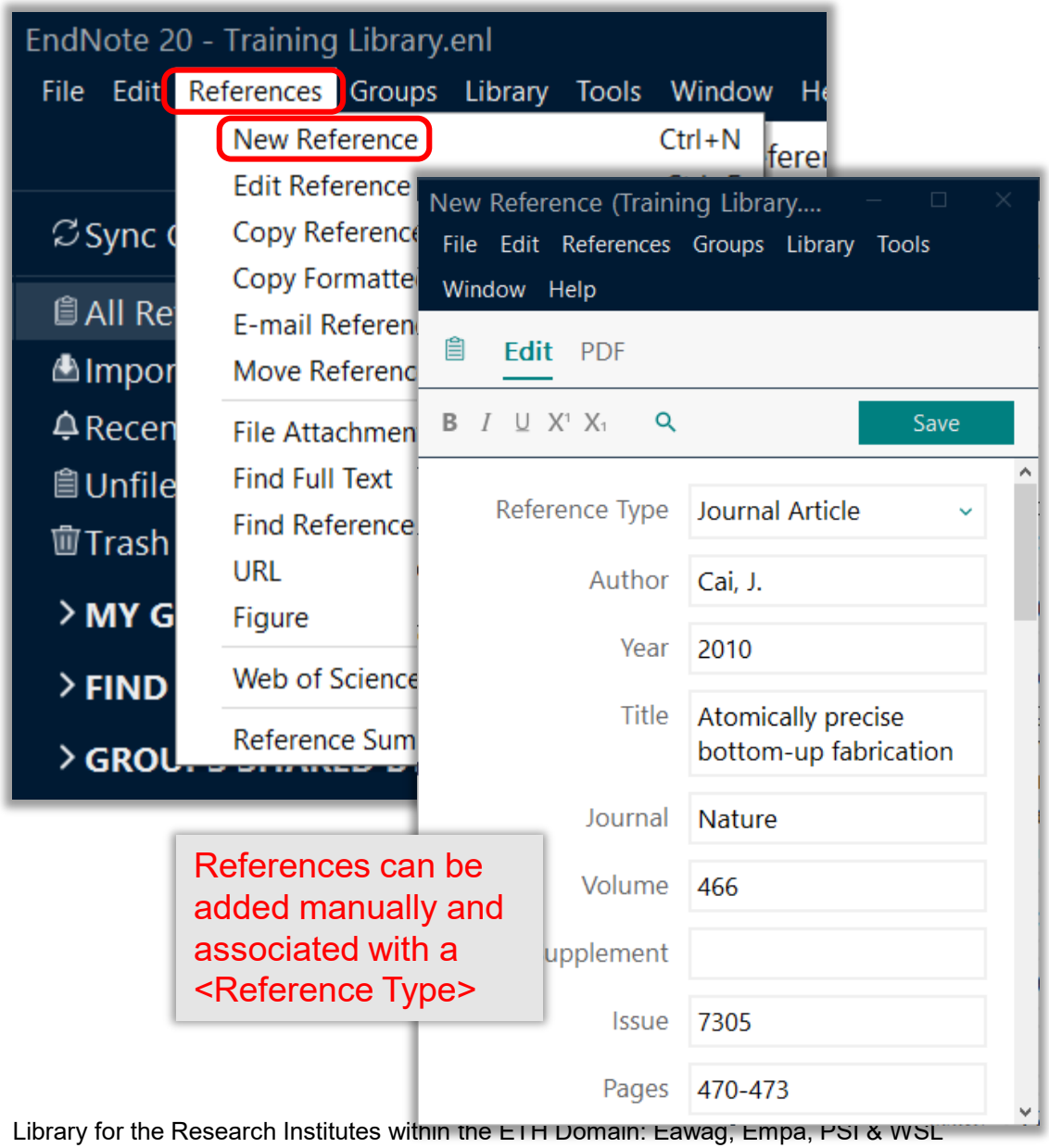




- Tip: PDF-file renaming can also be done later, even as a batch, via References > File Attachments > Rename PDFs
- Tip: DOI needs to be present to allow for the extraction of metadata from PDFs

Existing PDF annotations are kept during import

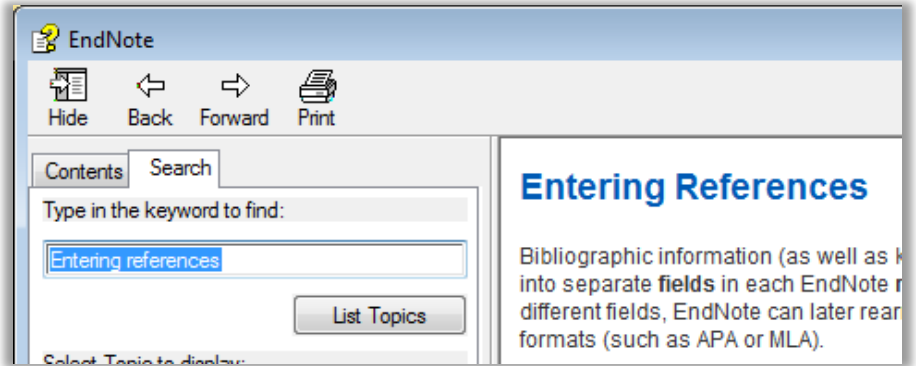
Collect Metadata – Manual Addition of references



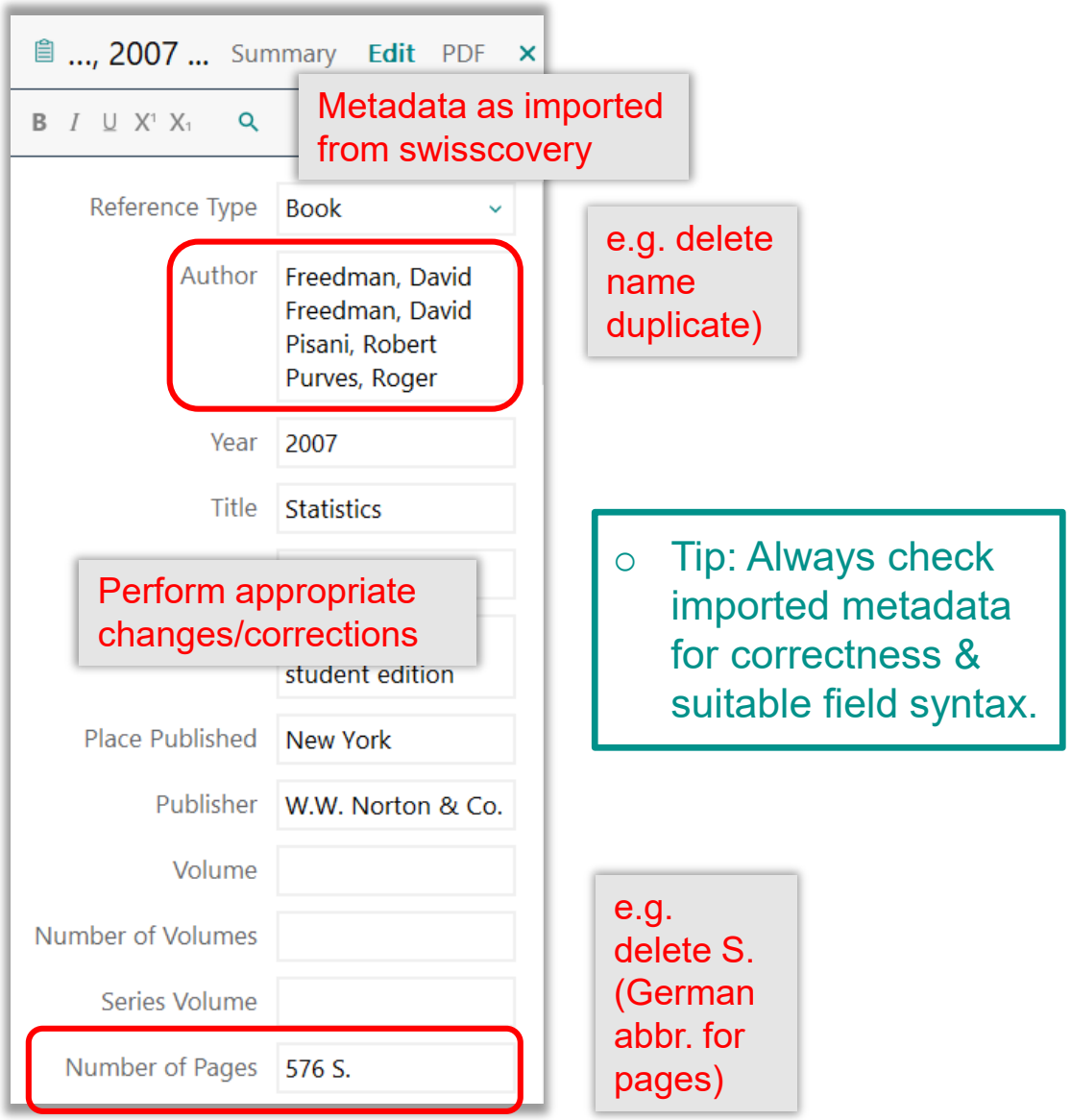
References can be added manually and associated with a <Reference Type>

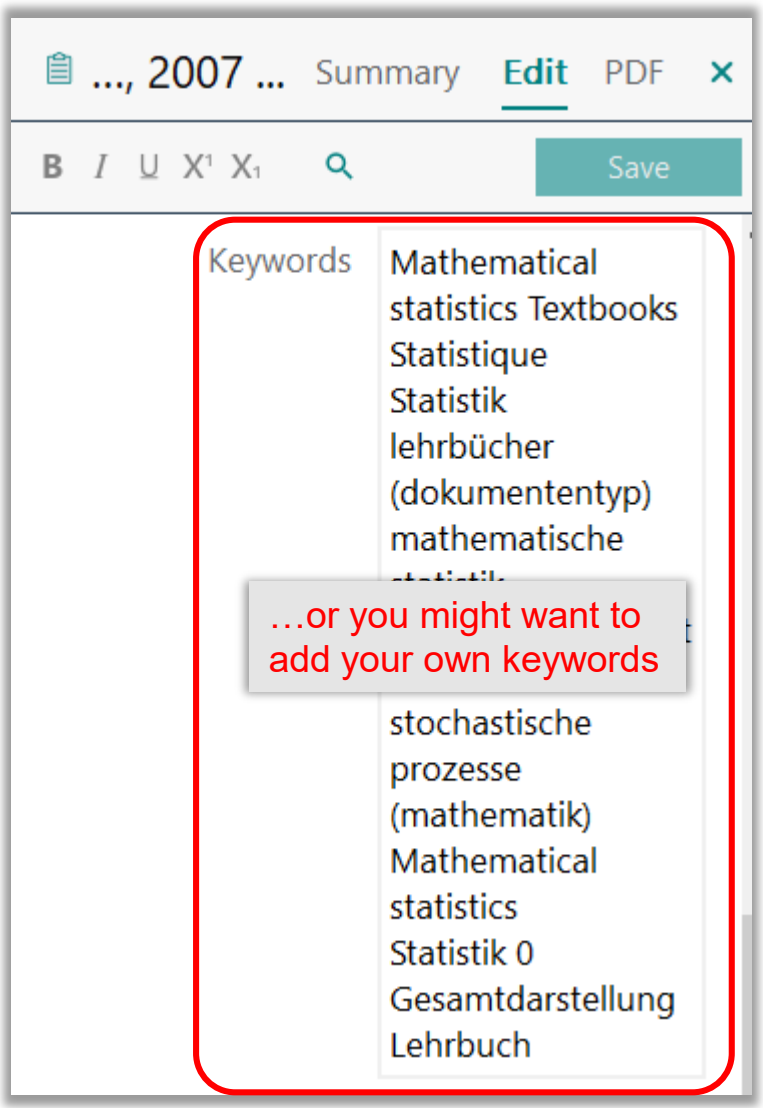
- For the manual addition of references you need to obey a certain syntax and rules regarding the input of the metadata into the respective fields
- Rules are pretty straightforward and their effect (for a given output style) can be seen in the bottom section of the summary tab

- 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



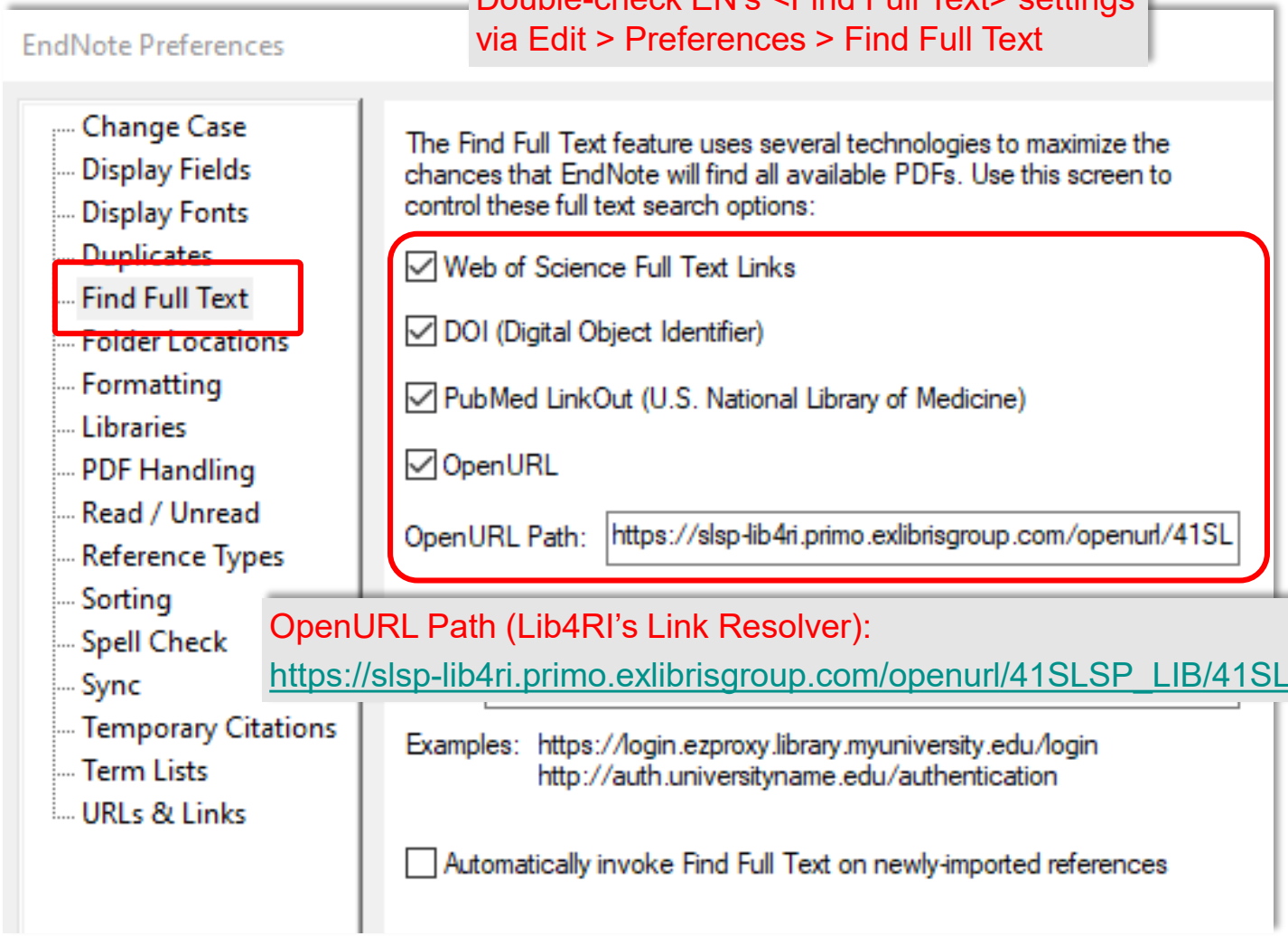
Collect Metadata – Manual Alteration / Editing of references





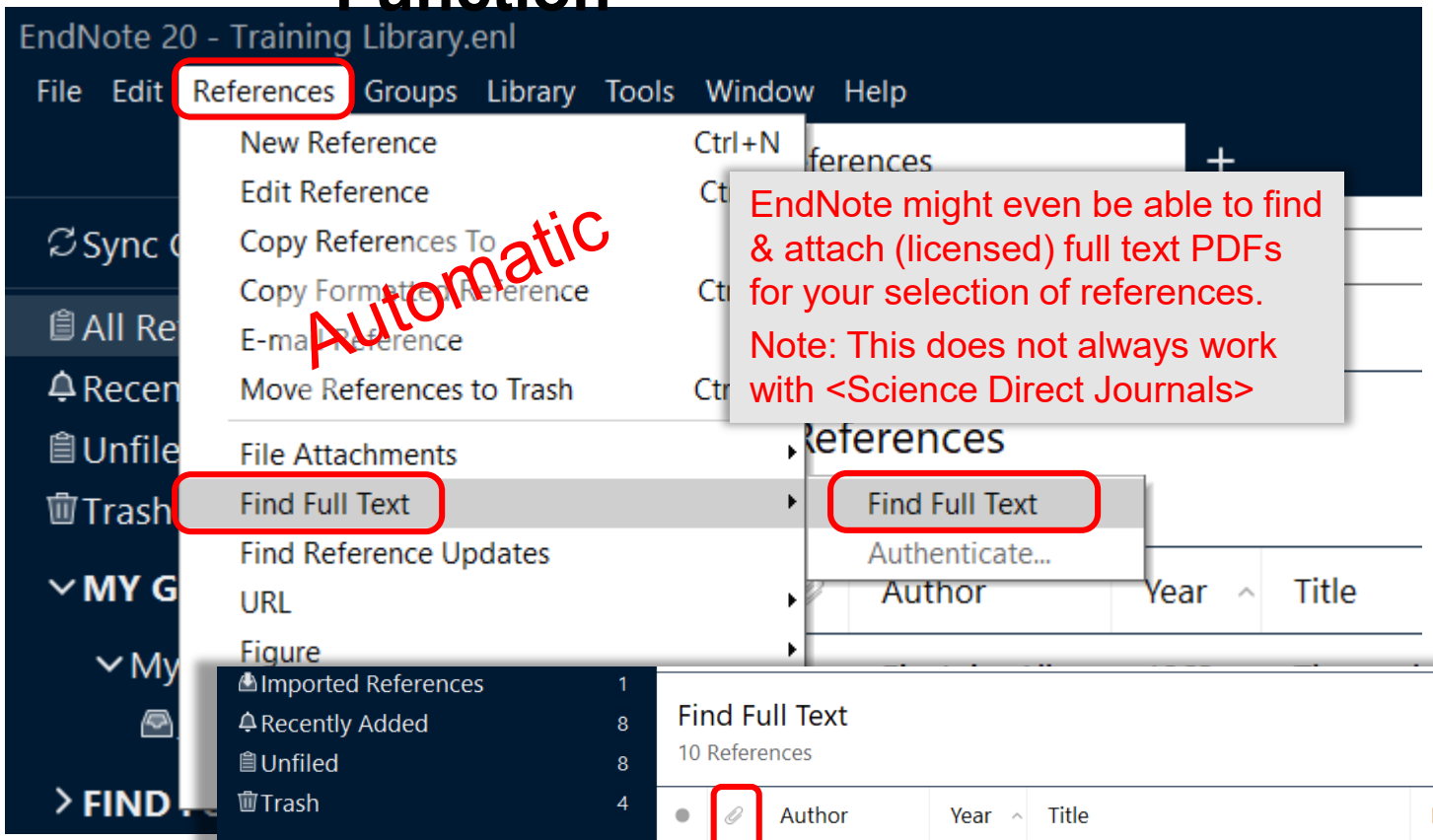
Find & Attach Fulltext PDFs

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



OpenURL Path (Lib4RI's Link Resolver):
https://slsp-lib4ri.primo.exlibrisgroup.com/openurl/41SLSP_LIB/41SLSP_LIB:GO?

Find & Attach Fulltext PDFs – EN's <Find Full Text> Function



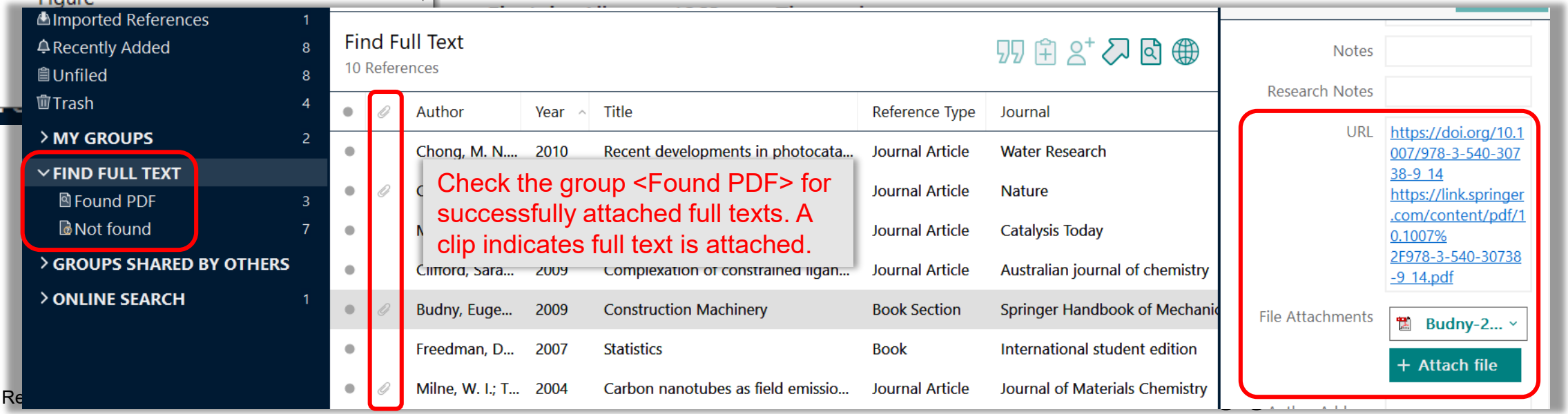
EndNote might even be able to find & attach (licensed) full text PDFs for your selection of references.

Note: This does not always work with <Science Direct Journals>

- Tip: Use EN's PDF file auto-renaming (see Edit > Preferences > PDF Handling)

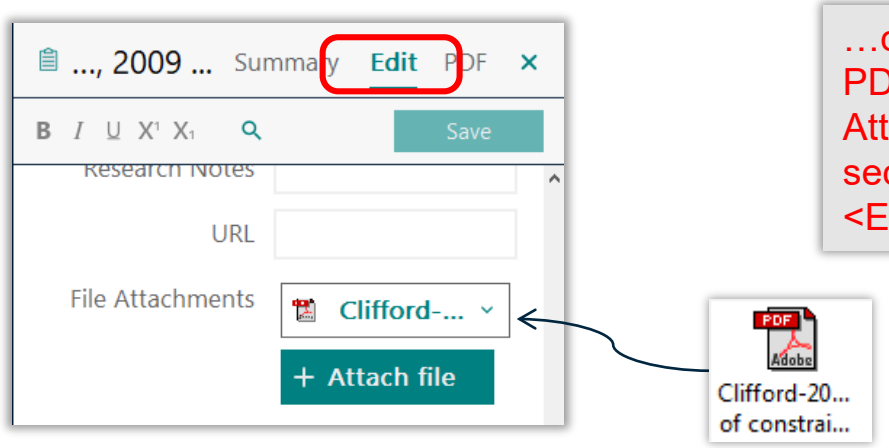
…be patient, finding & downloading might take a little while and sometimes needs to be repeated for the ones not found

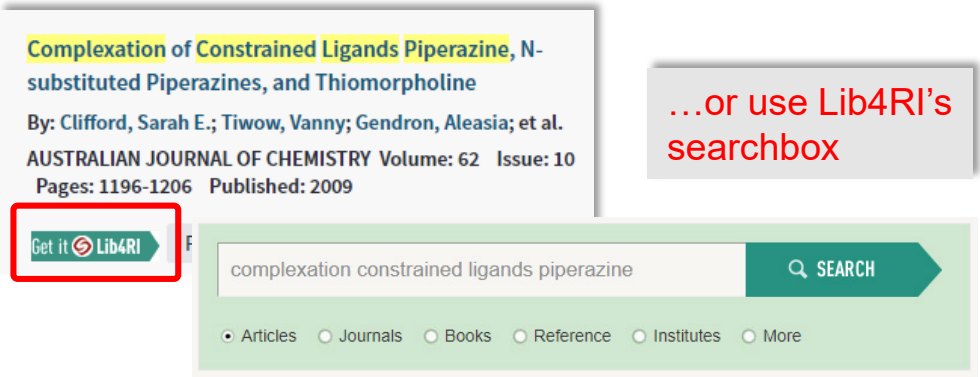
The fields <File Attachments> & URL are populated accordingly

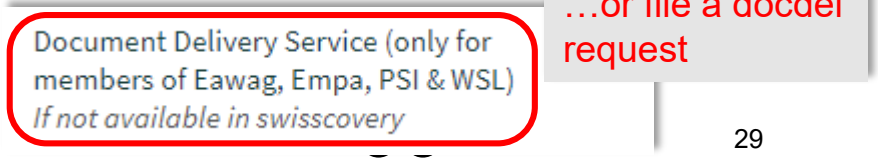


Check the group <Found PDF> for successfully attached full texts. A clip indicates full text is attached.

Find & Attach Fulltext PDFs – Lib4RI's swisscovery Link Resolver







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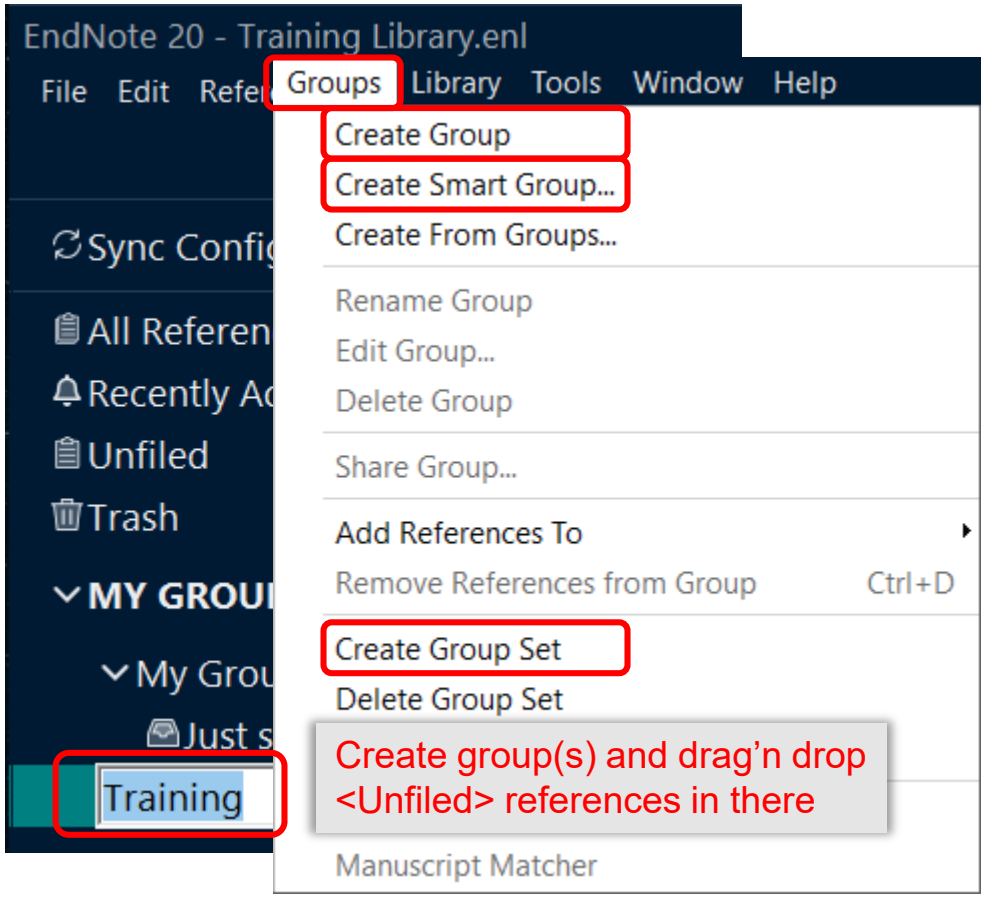
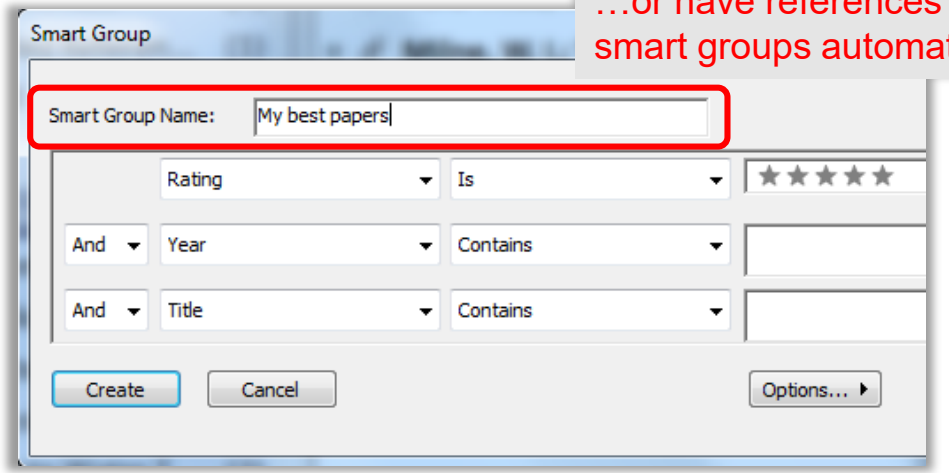
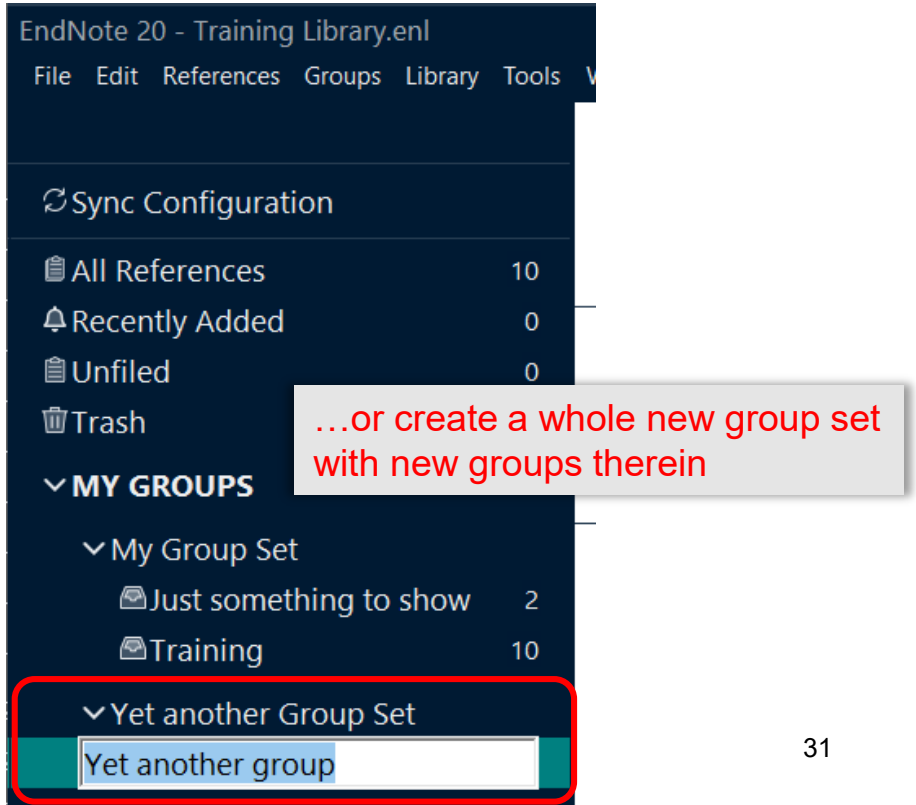
Organising your Library – Grouping References

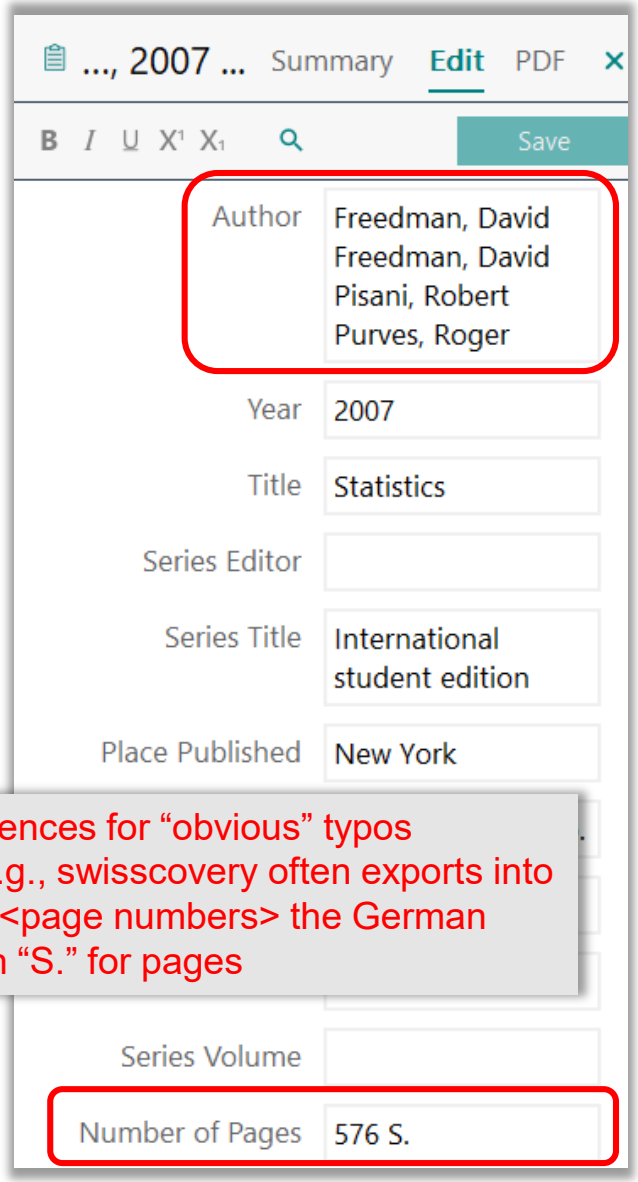




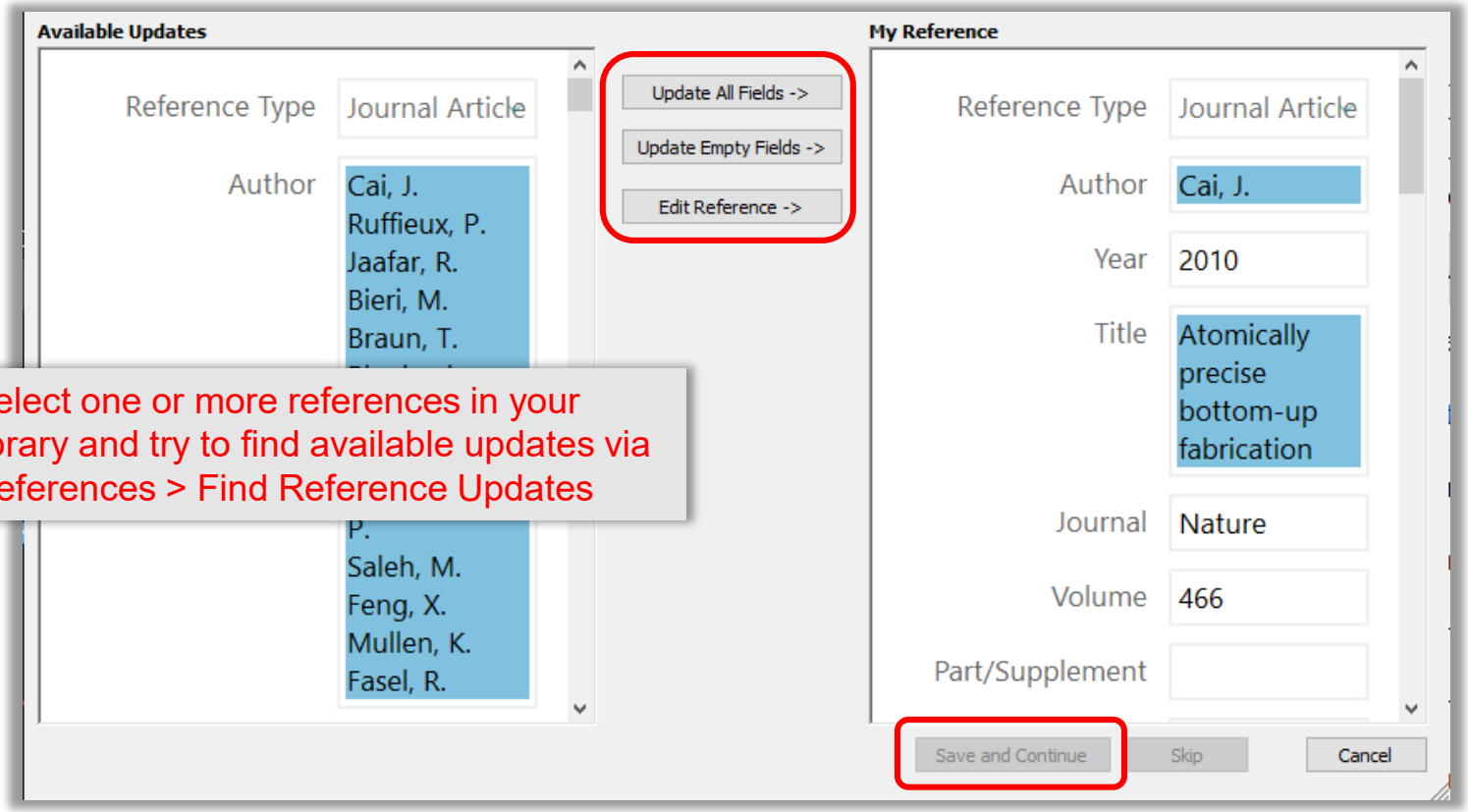


- Tip: Work with one library only and rather assign references to groups suiting your different purposes (eg your different papers, theses, …
- Tip: One reference can be a member of multiple groups (no duplicates are created)

Organising your Library – Checking & Updating References



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

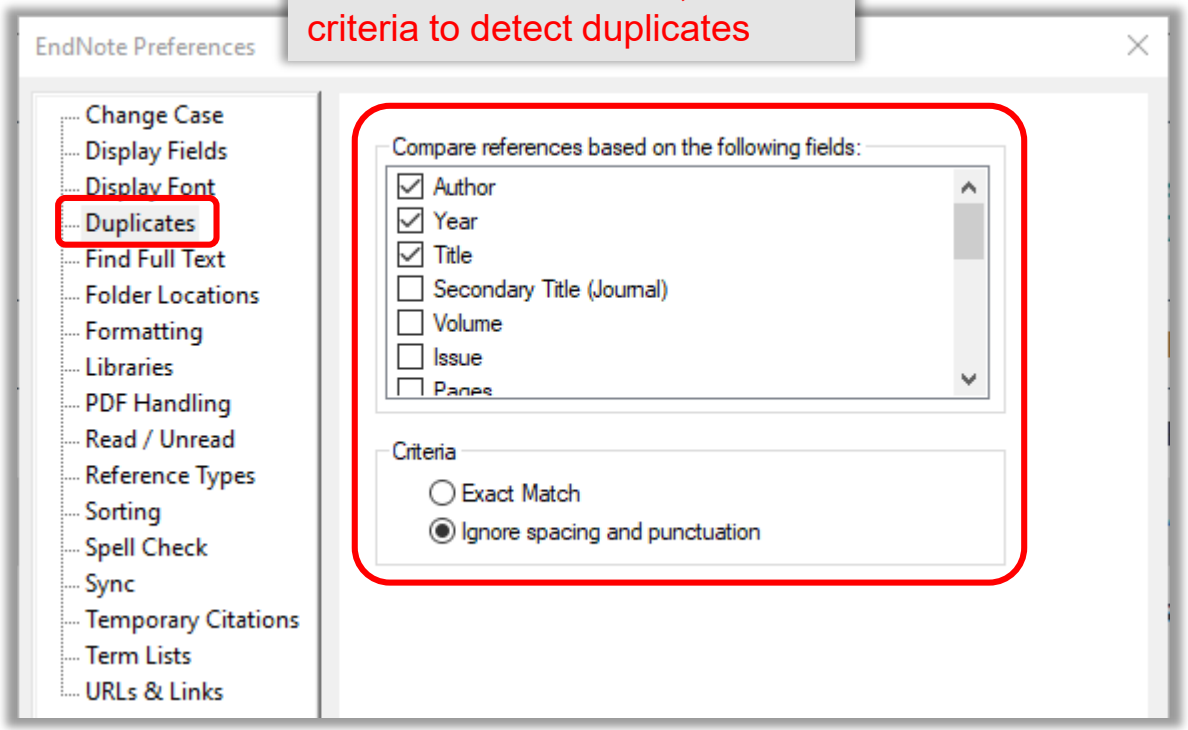


Select one or more references in your library and try to find available updates via References > Find Reference Updates

- Tip: If you don’t want to update all or empty fields only; you can also just copy / paste individual fields via <Edit Reference> (requires to save manually).
- This tool is particularly handy for updating manually input and incomplete references

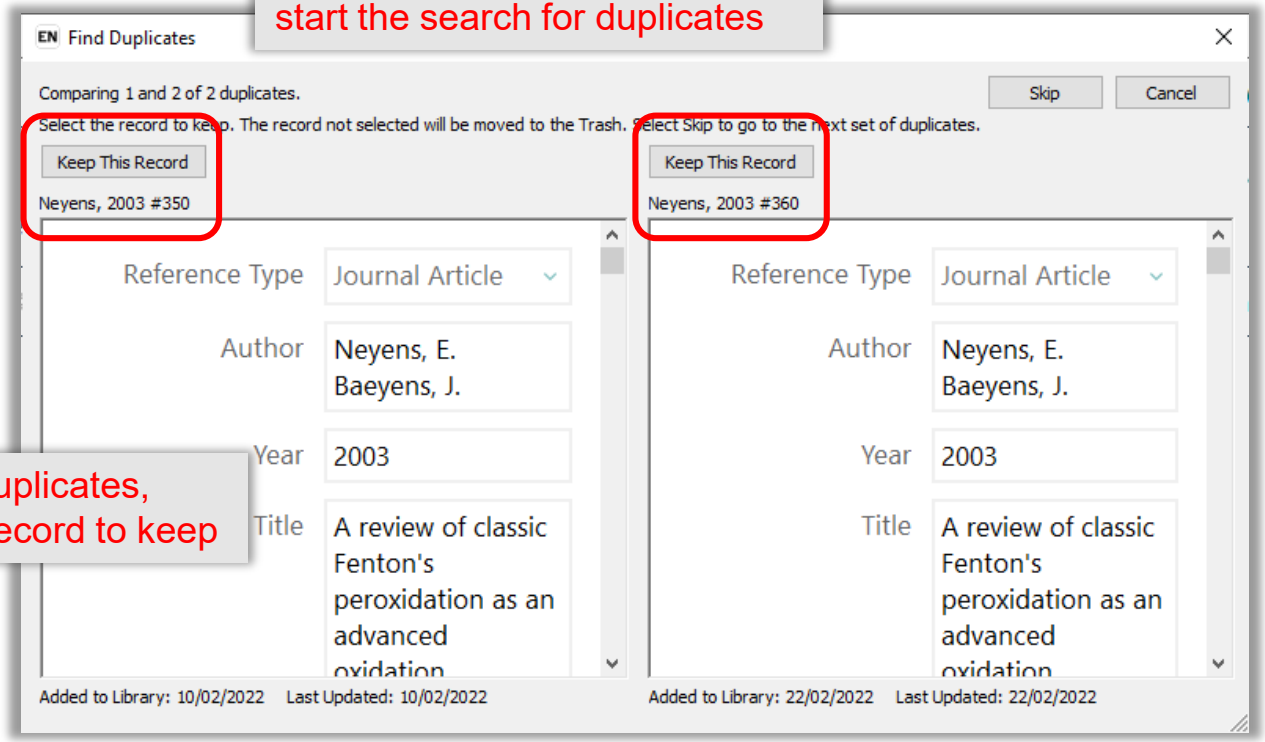
Organising your Library – Finding Duplicates

Via Edit > Preferences, set the criteria to detect duplicates



- Tip: EndNote assigns unique and increasing record numbers (e.g. below, #350 and #360) to all references. This can become handy to quickly identify a "later" duplicate from an "early" original without having to double-check all fields.

Via Library > Find Duplicates, start the search for duplicates

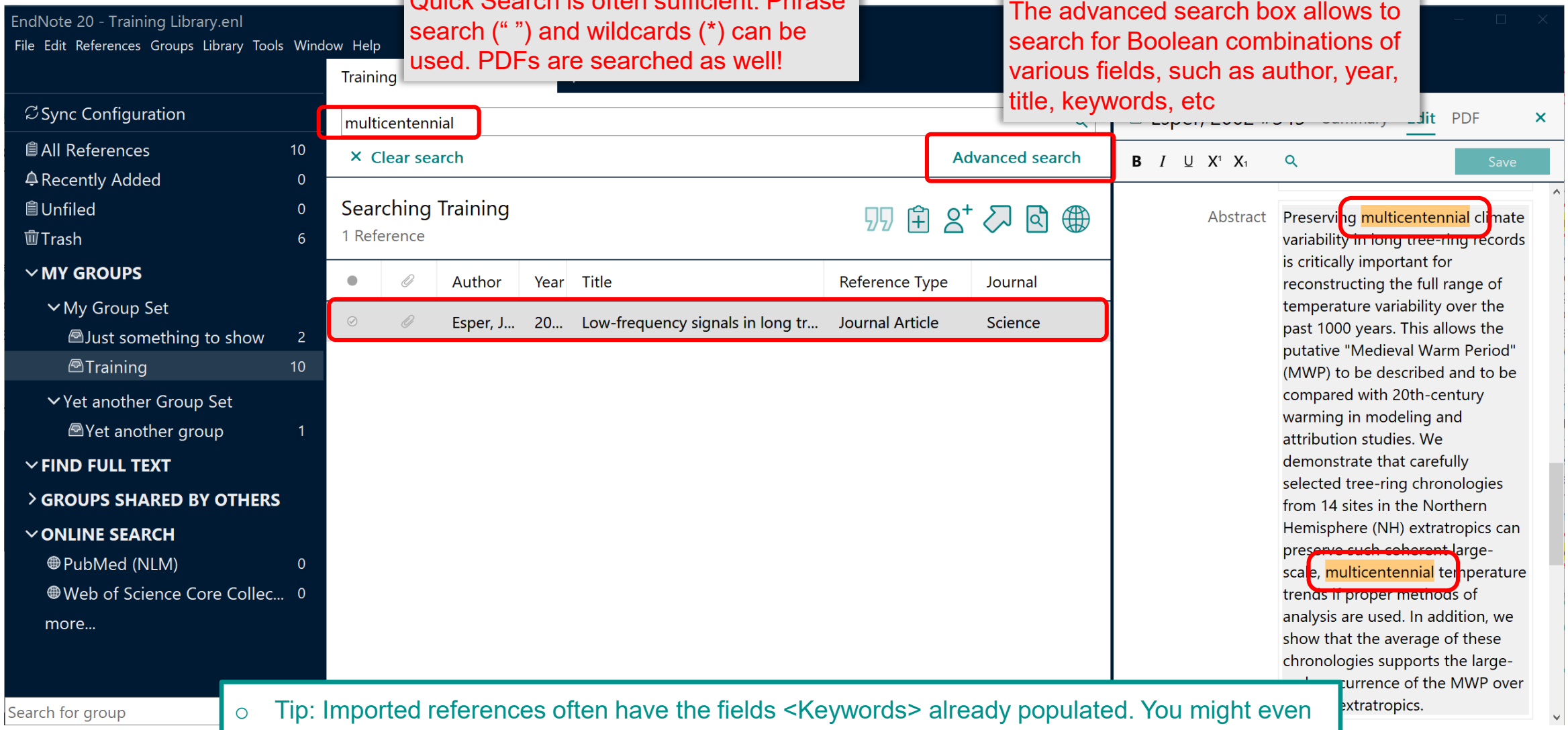


For all found duplicates, decide which record to keep

Organising your Library – Searching Your Library

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

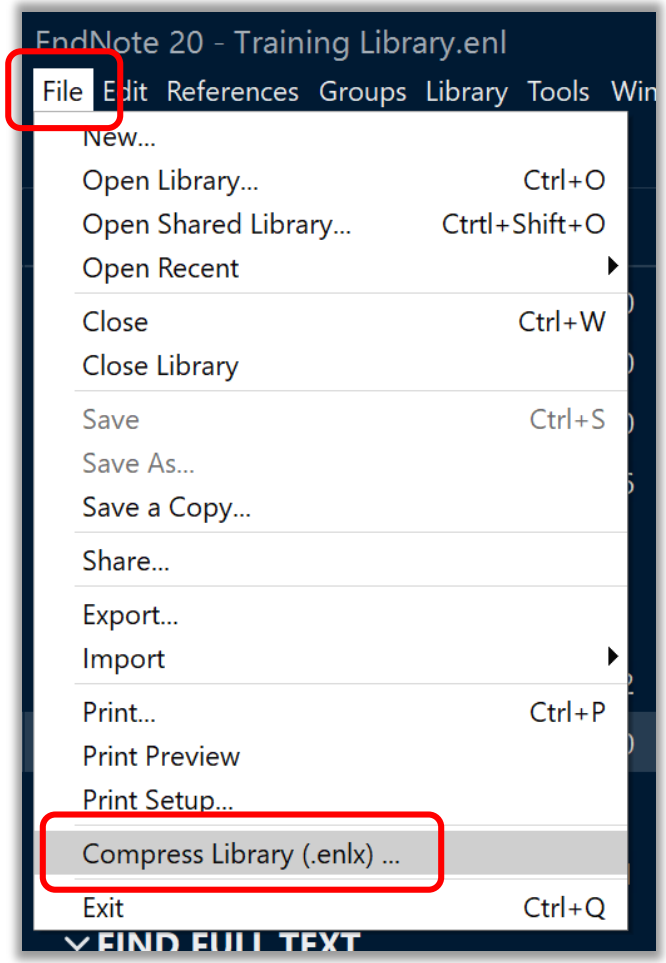
The advanced search box allows to search for Boolean combinations of various fields, such as author, year, title, keywords, etc



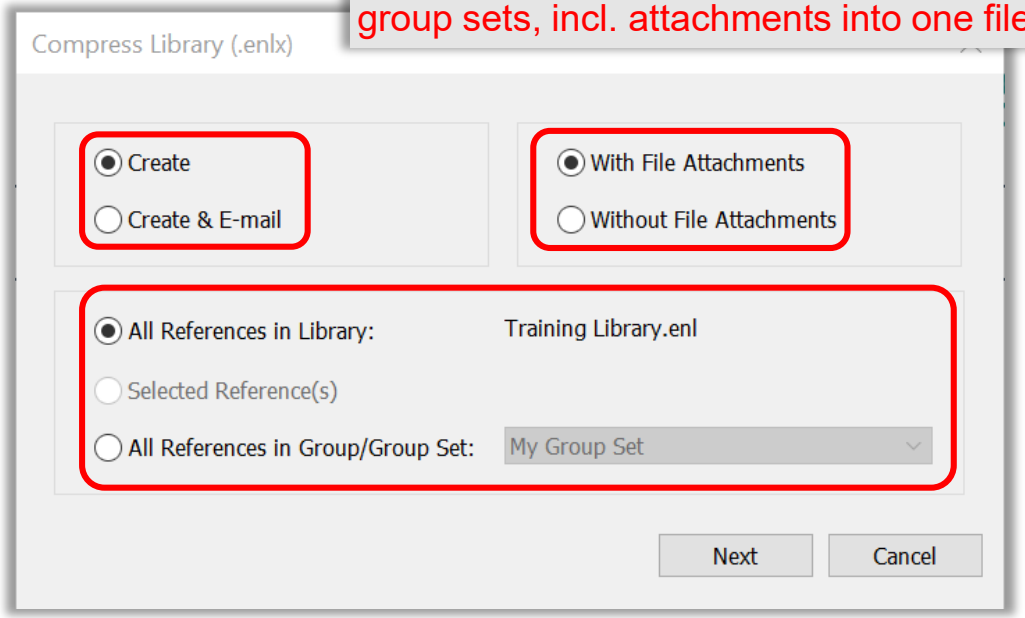
- Tip: Imported references often have the fields <Keywords> already populated. You might even consider adding your own keywords to references as they are all searchable.

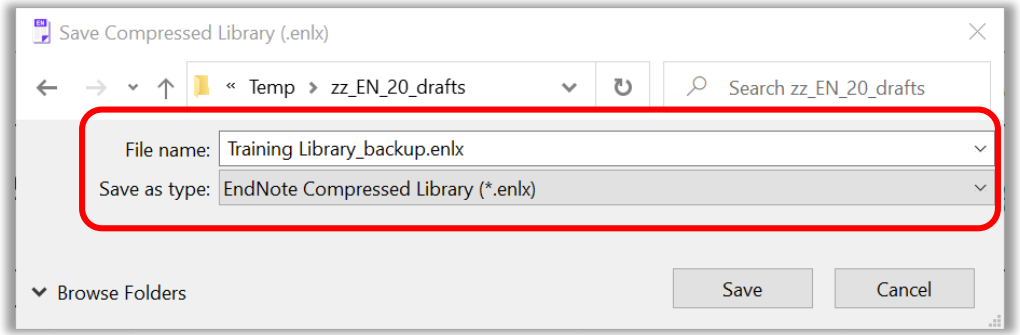
CC BY

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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- Manually adding & altering references (25)
- Find & attach full text PDFs (27)

Organise

- Building groups (31)
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Cite

- Bibliographic output styles (37)
- Cite-while-you-write (MS Word) (42)
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Share & Sync

- Without EN Online Account (50)
  - Share references via E-mail
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  - Share library as a compressed library or via servers
- With EN Online Account (53)
  - Sync between your devices
  - Share entire library
  - Share groups

Concluding Info, Help & Useful Links

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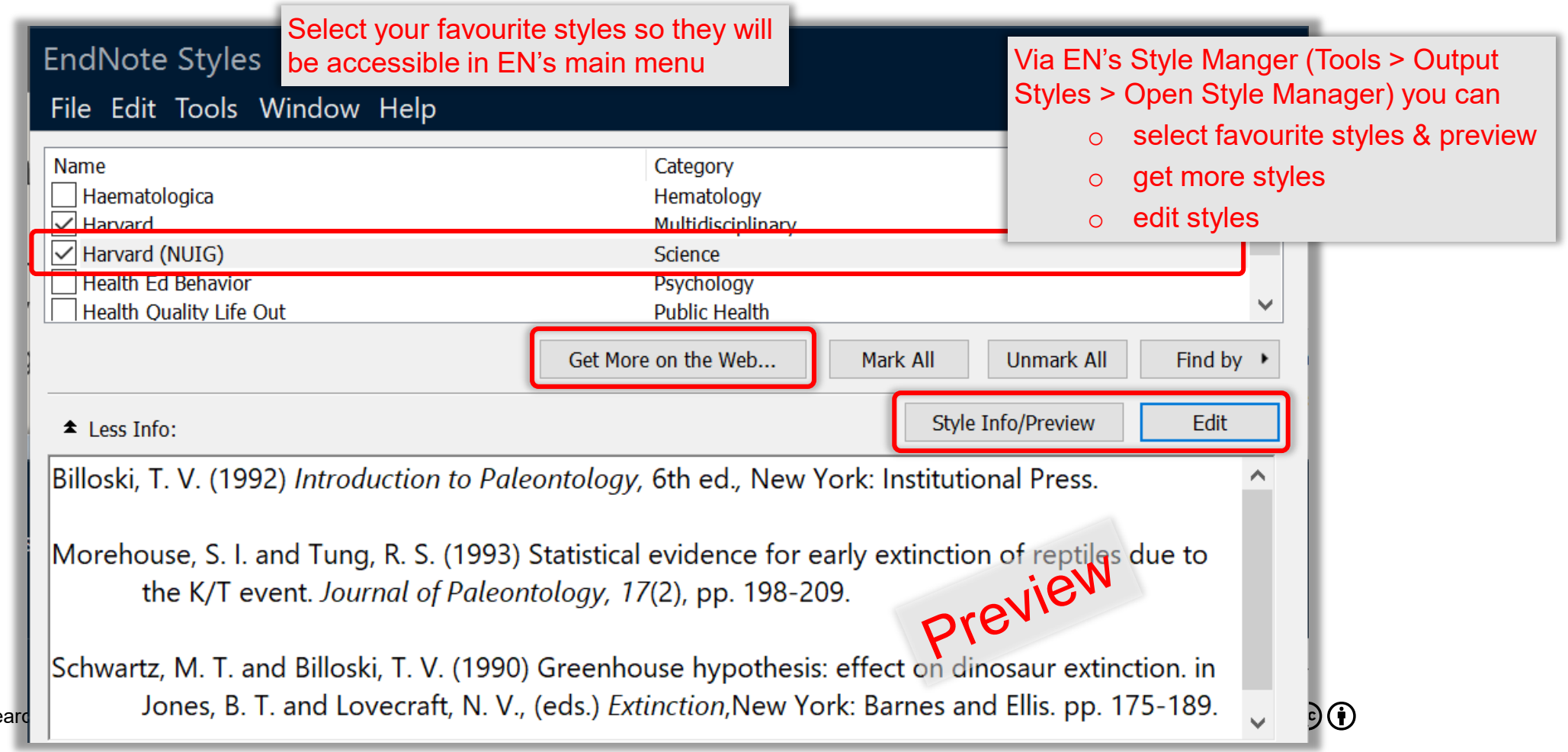
Cite – Bibliographic Output Styles

- Output styles determine how references will be formatted and displayed in your bibliography or in your text document
- EN's <Style Manager> provides >6000 styles (incl. demands for most journals)

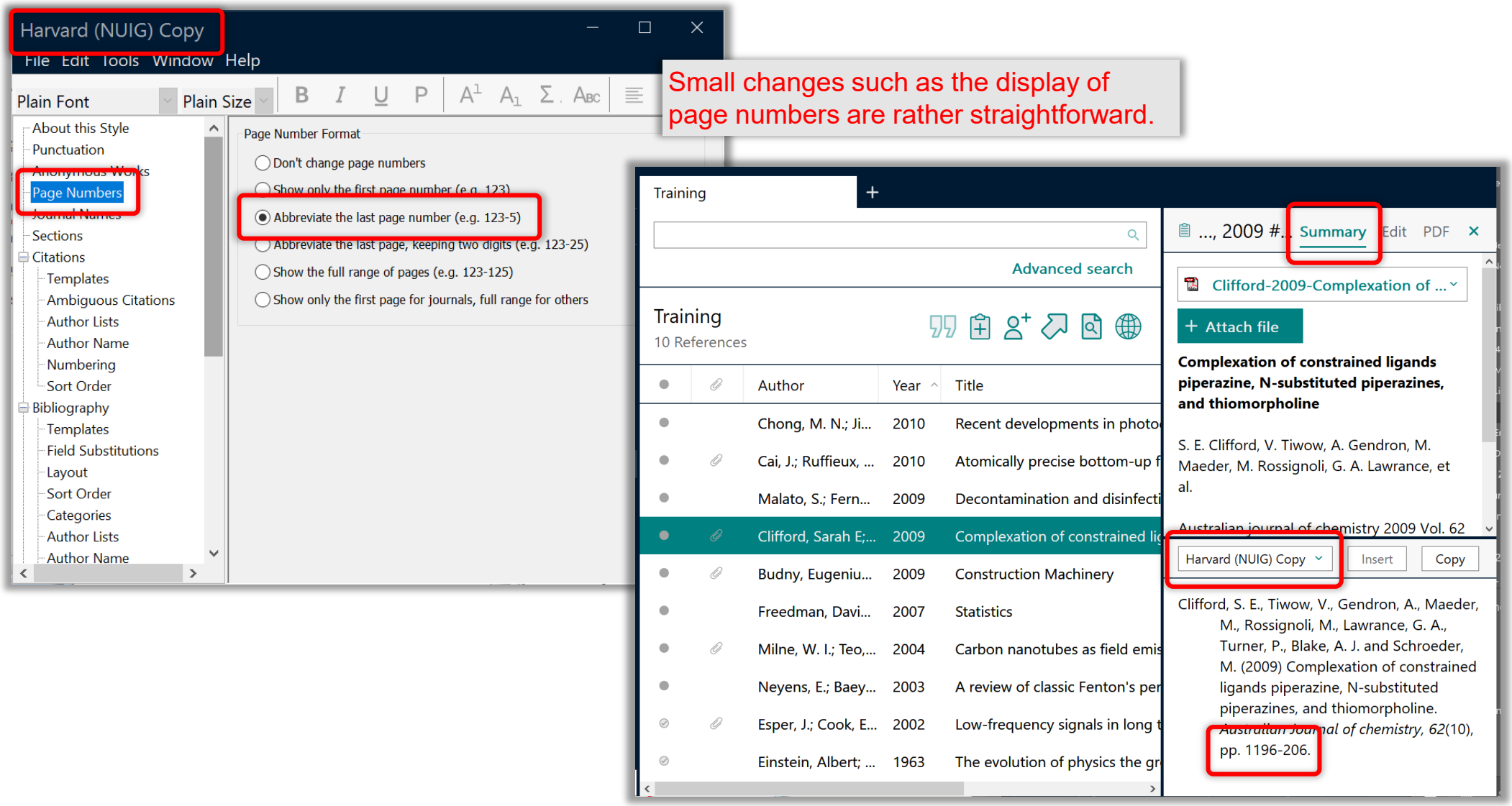


Cite – Bibliographic Output Styles

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

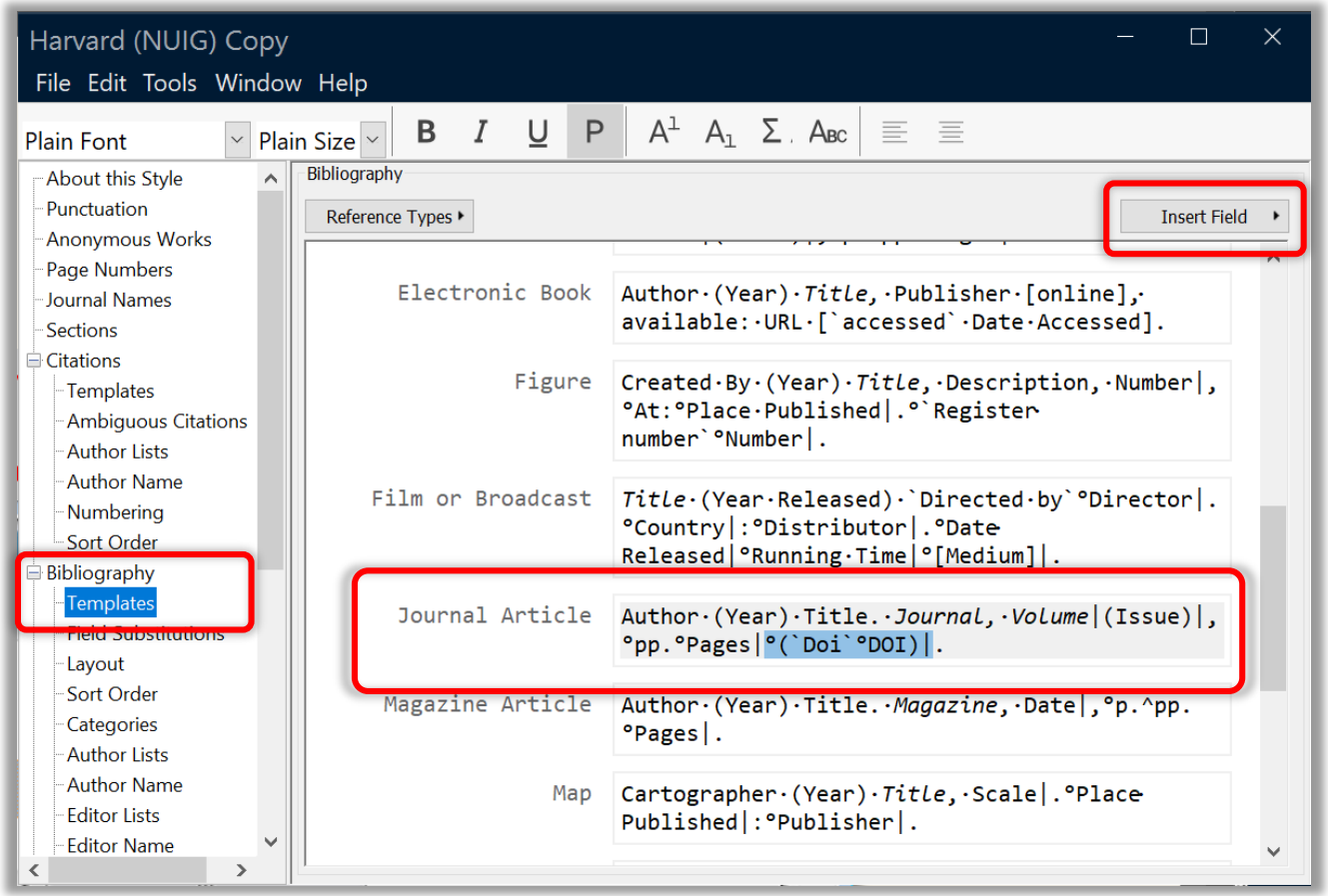
- Tip: EN's style editor is very powerful and can require a fair bit of training to get used to the rules and special characters that effect the formatting of your citations/bibliography.
- Tip: If you want to create/alter a style
  - Using EN's style manager, find & select the one closest to your liking 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 summary/preview pane of EN's main window (after saving)
  - EN's manual on modifying reference types and output styles (X8 but still ok)
    https://clarivate.libguides.com/ld.php?content_id=33224848 (Windows)
    https://clarivate.libguides.com/ld.php?content_id=33224873 (Mac)

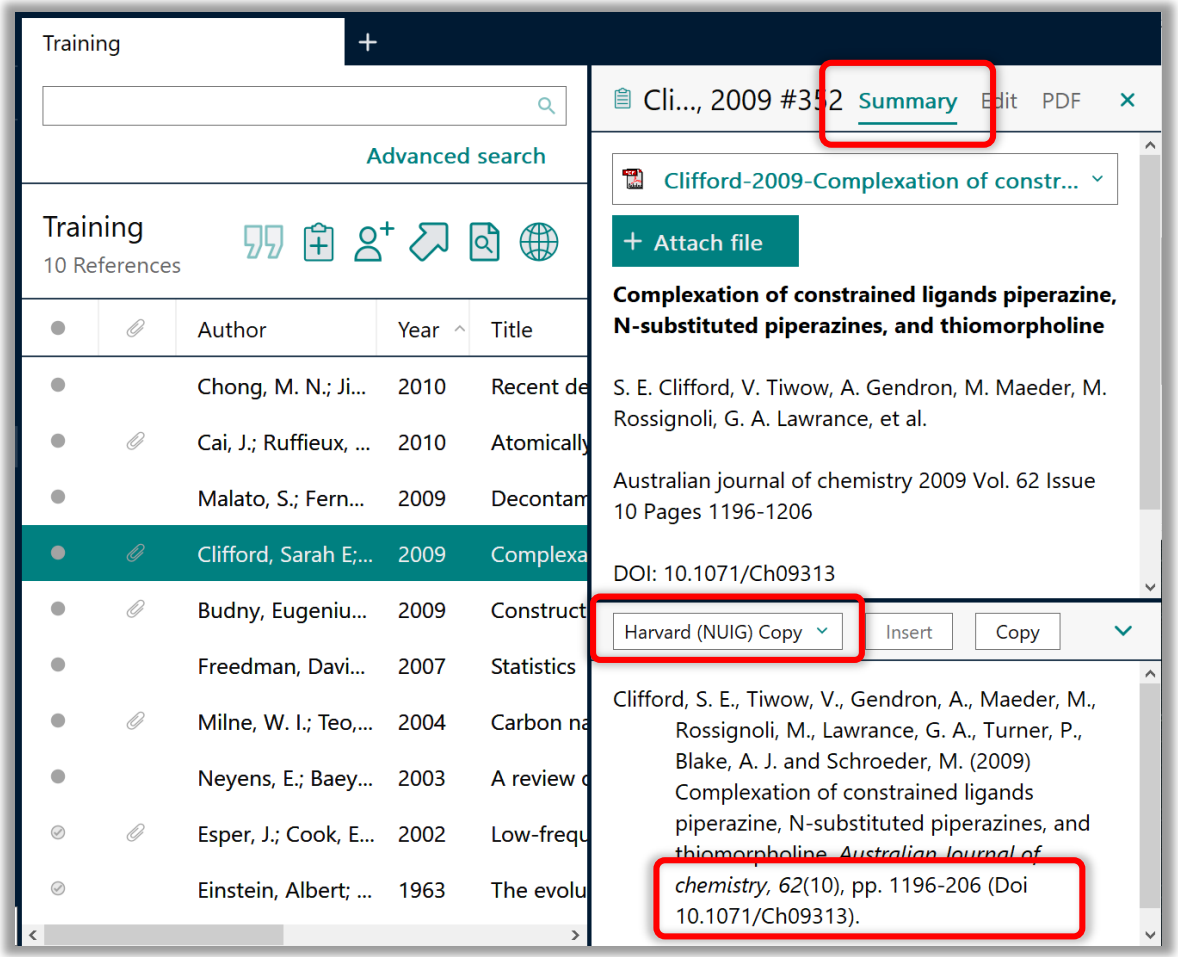
Cite – Bibliographic Output Styles



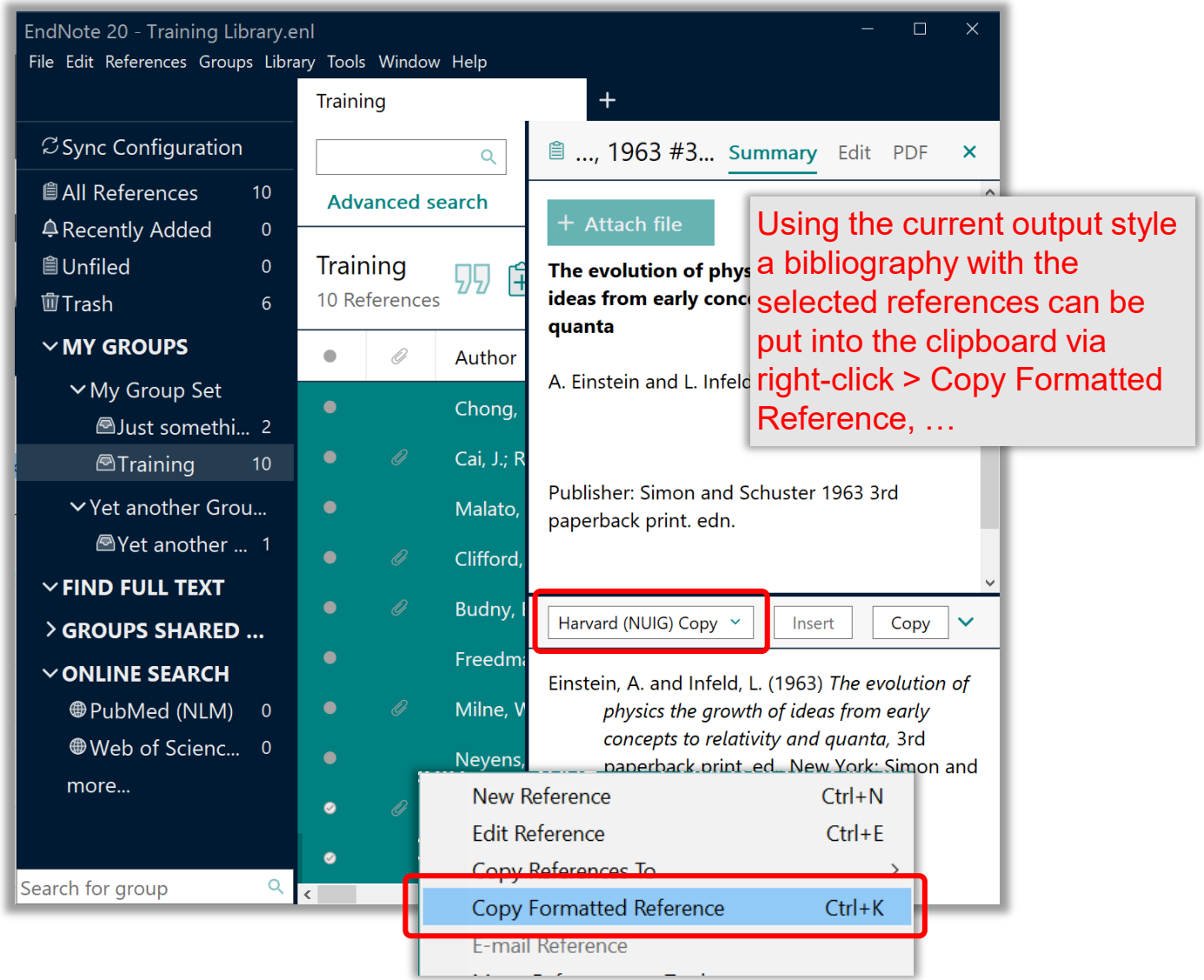
Cite – Bibliographic Output Styles

Others, such as the addition of the field <DOI> to the reference type <Journal Articles>, require a bit more knowhow (hit F1 key or see manual on modifying styles).





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 Reference, …

…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*,Berlin, Heidelberg: Springer Berlin Heidelberg. pp. 1149-266.

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. 470-3 (Doi 10.1038/nature09211).

Chong, M. N., Jin, B., Chow, C. W. K. and Saint, C. (2010) Recent developments in photocatalytic water treatment technology: A review. *Water Research, 44*(10), pp. 2997-3027 (Doi 10.1016/j.watres.2010.02.039).

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).

Einstein, A. and Infeld, L. (1963) *The evolution of physics the growth of ideas from early concepts to relativity and quanta,* 3rd paperback print. ed., New York: Simon and Schuster.

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 (Doi 10.1126/science.1066208).

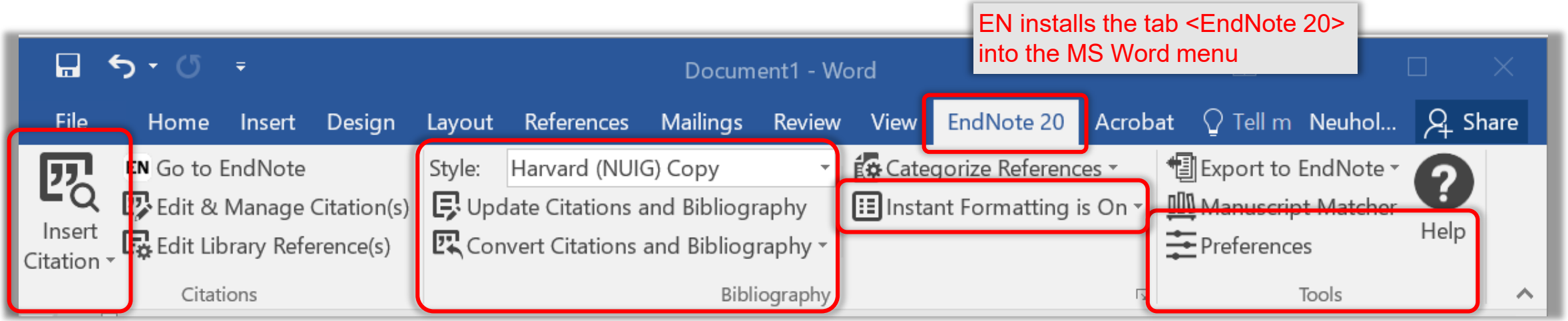
Freedman, D., Pisani, R. and Purves, R. (2007) *Statistics, International student edition,* 4th , international student ed., New York: W.W. Norton & Co.

Malato, S., Fernández-Ibáñez, P., Maldonado, M. I., Blanco, J. and Gernjak, W. (2009) Decontamination and disinfection of water by solar photocatalysis: Recent overview and trends. *Catalysis Today, 147*(1), pp. 1-59 (Doi 10.1016/j.cattod.2009.06.018).

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. 933-43 (Doi 10.1039/b314155c).

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 (Doi 10.1016/S0304-3894(02)00282-0).

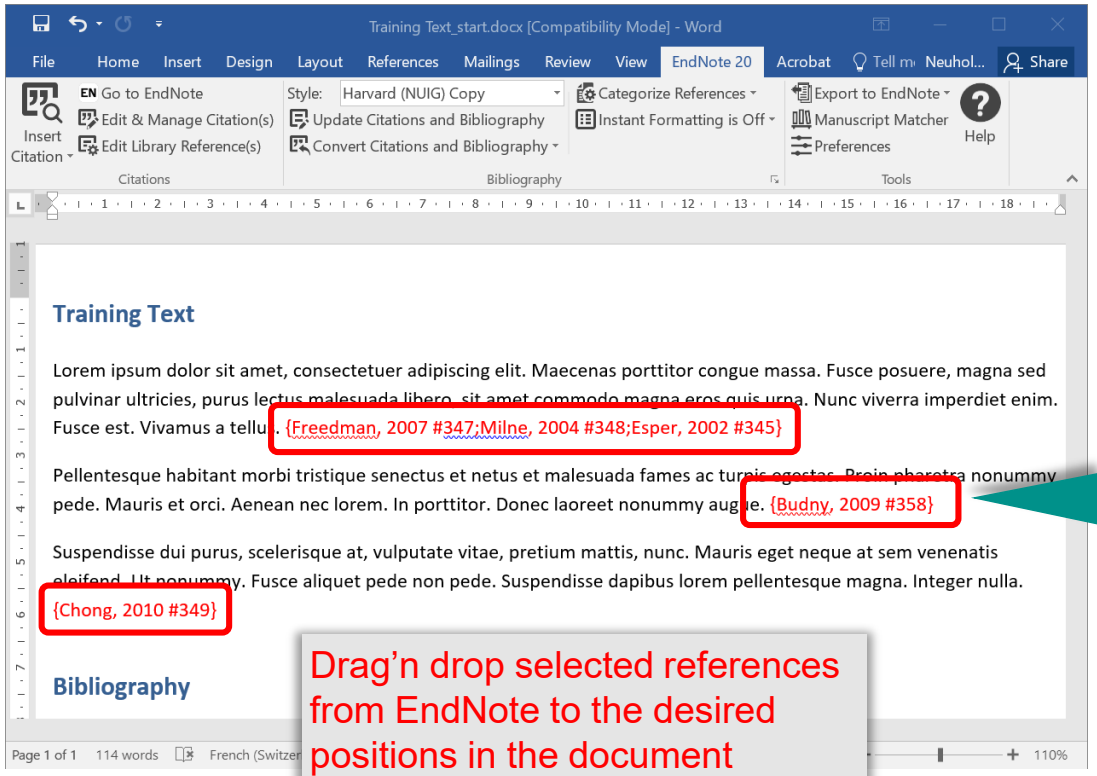
Cite-While-You-Write (MS Word Plugin)



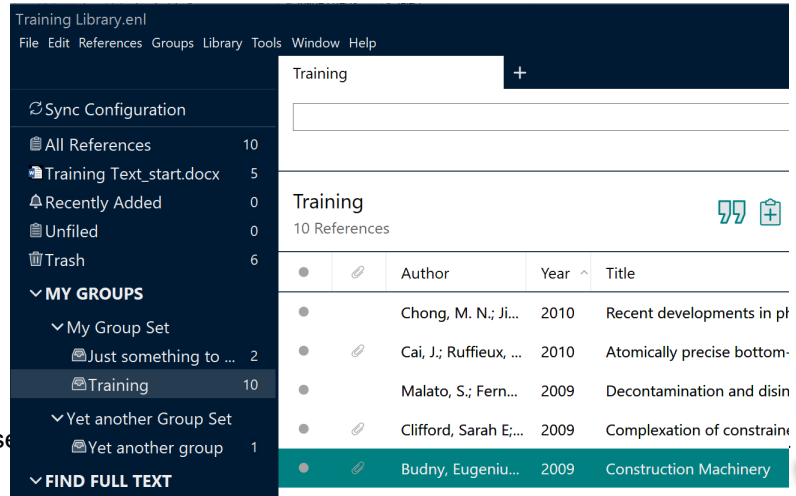
- EN's Word plugin acts as an interface between EN and MS Word
- Either use <Insert Citation> from within the Word document or drag'n drop selected citation(s) from EN to the desired position in the document
- By default, EN activates <Instant Formatting>, i.e. citations and bibliography are automatically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

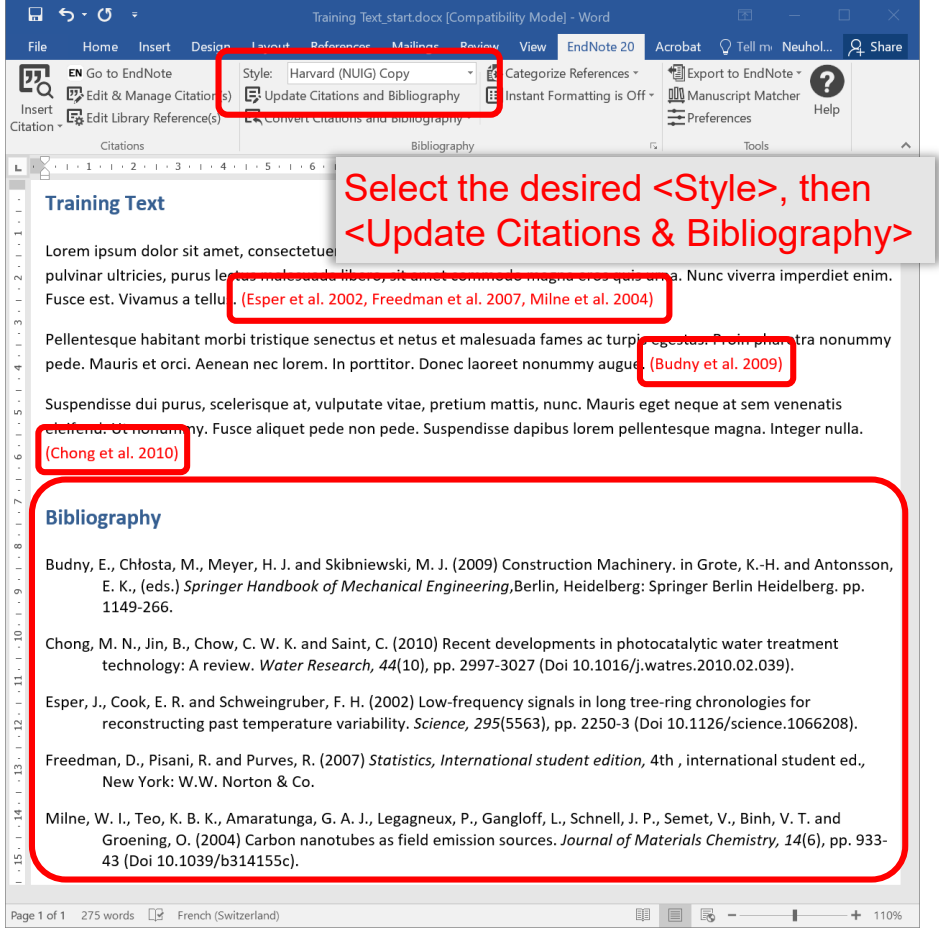
- Tip: Particularly if the document becomes rather large it is better to use the unformatted citations (via <Convert Citations and Bibliography>) and turn off <Instant Formatting> during the writing process.

Cite-While-You-Write (MS Word)

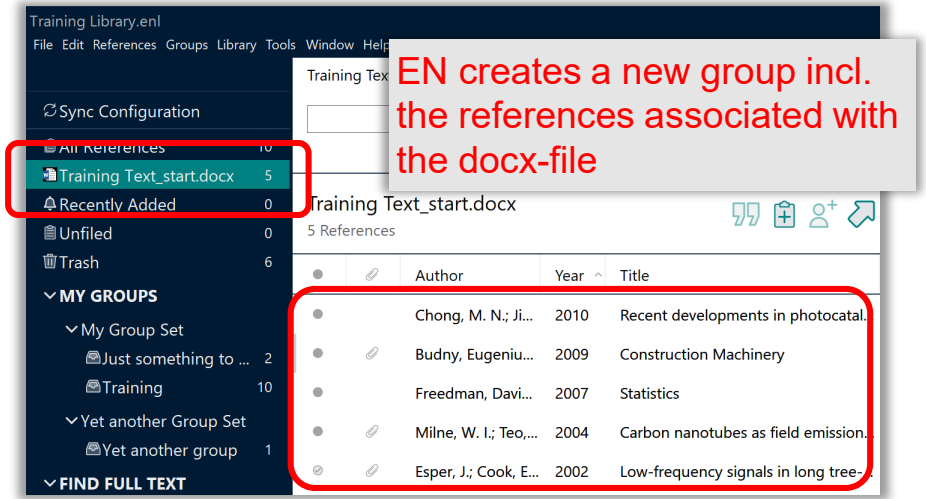


Drag'n drop selected references from EndNote to the desired positions in the document



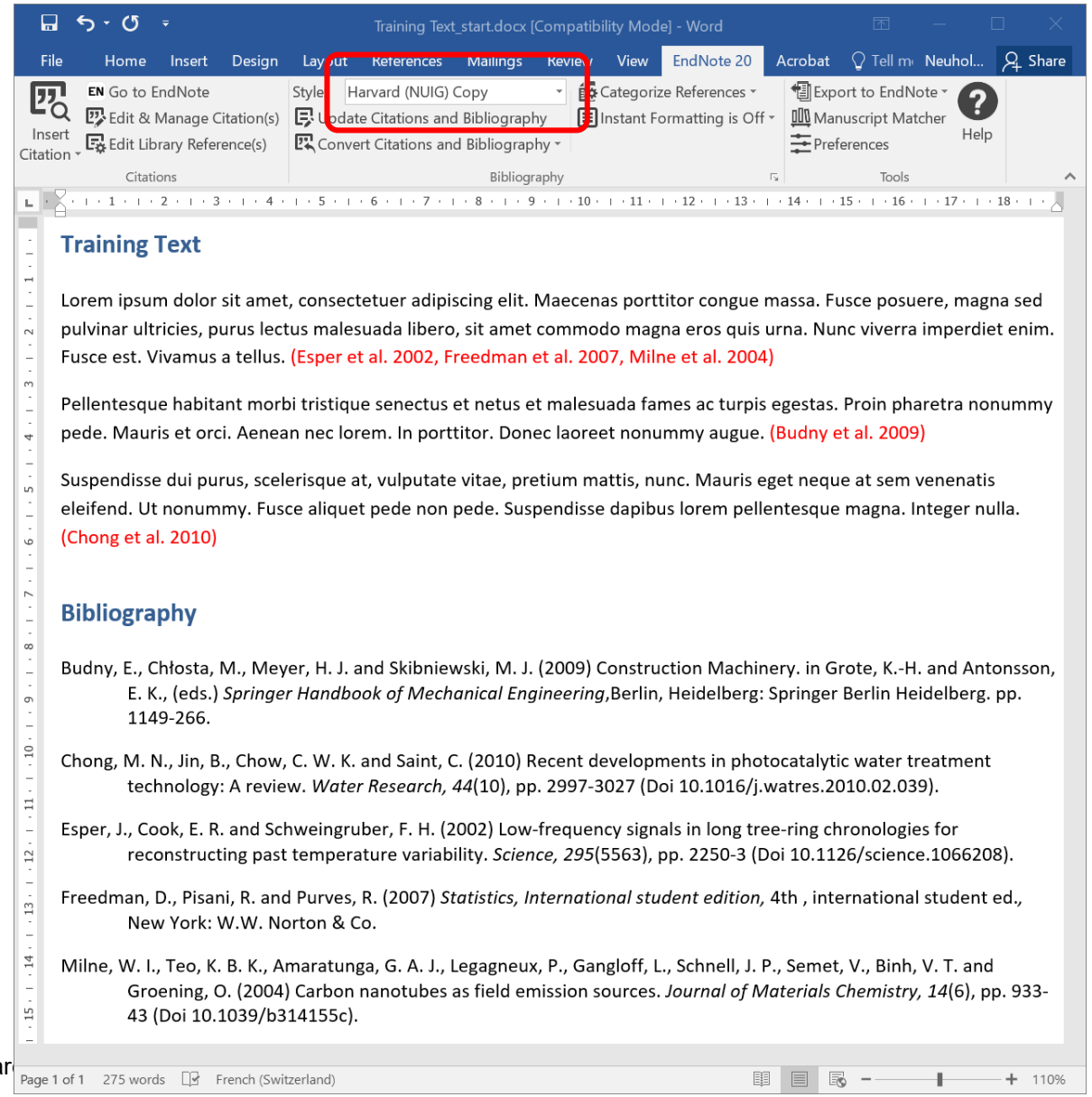


Select the desired <Style>, then <Update Citations & Bibliography>



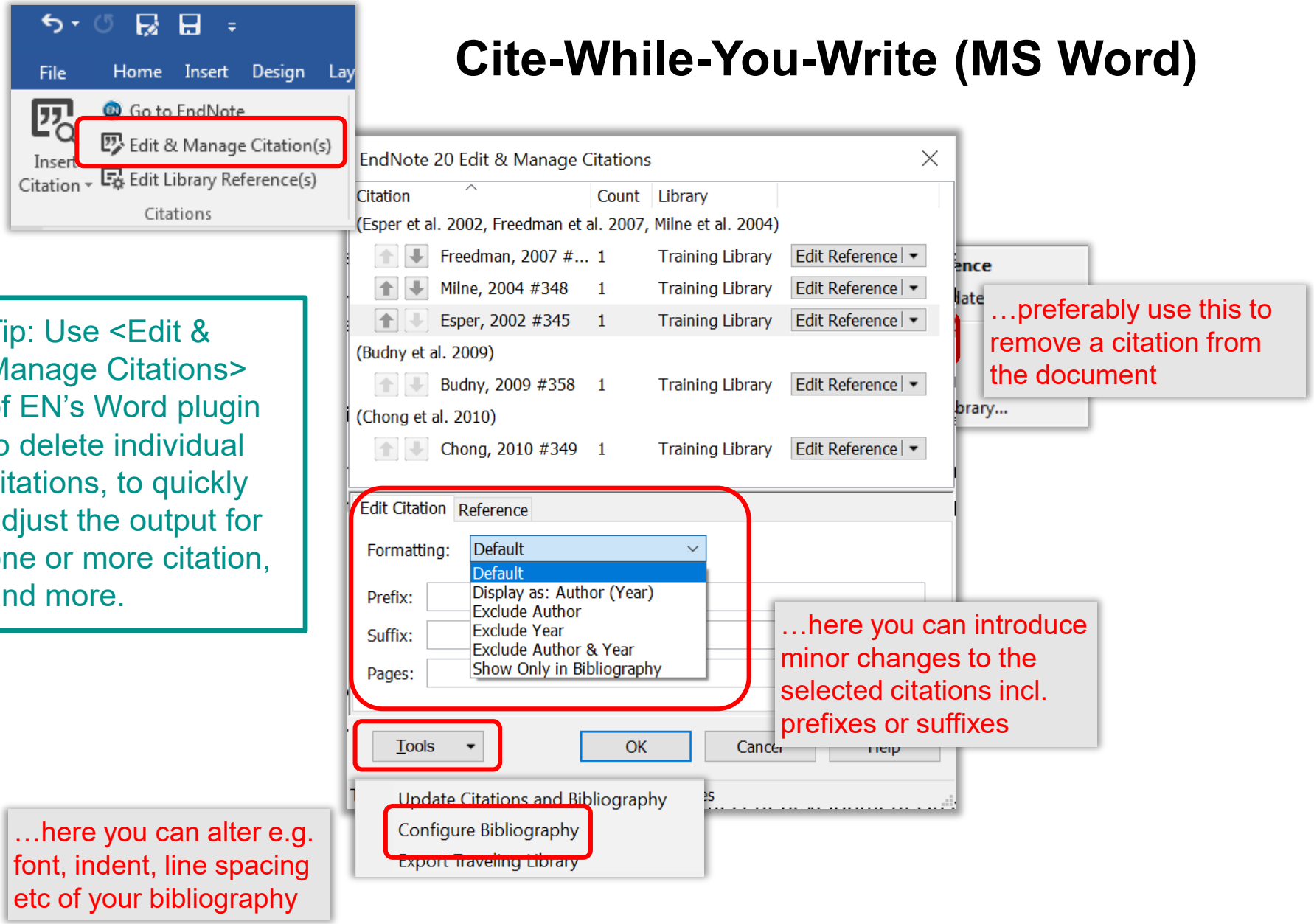
EN creates a new group incl. the references associated with the docx-file

Cite-While-You-Write (MS Word)



- Tip: Double-check if EN's output is according to your requirements (e.g. of the journal) or if there are any other issues (e.g. typos, missing or faulty field info)
- Tip: If needed, edit the output style to your satisfaction, save it to another filename (if needed), and <Update Citations and Bibliography> using the altered style

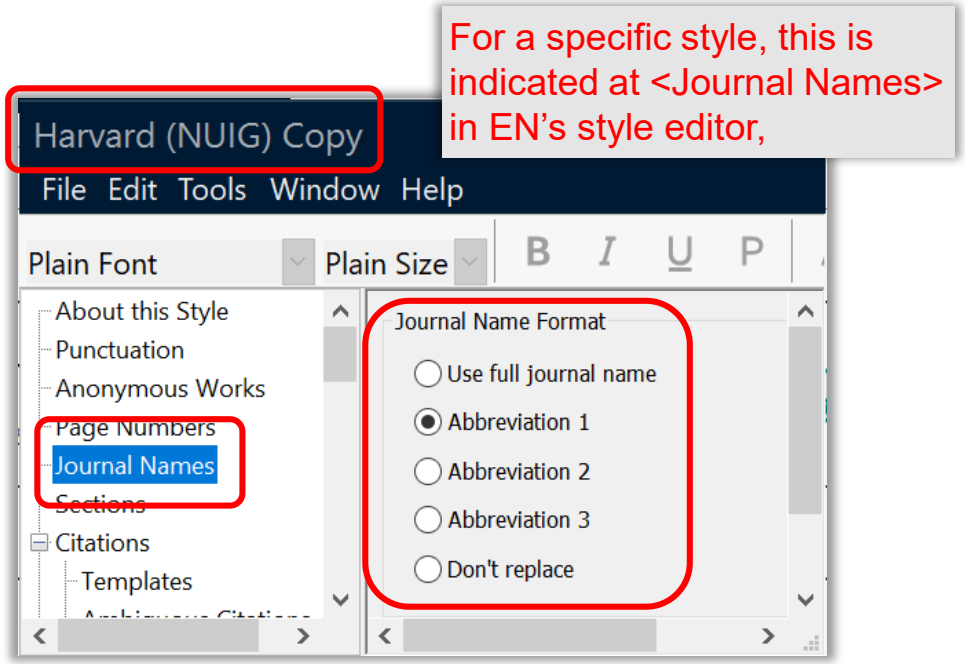
Cite-While-You-Write (MS Word)



- 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.

Cite – Using Journal Abbreviations

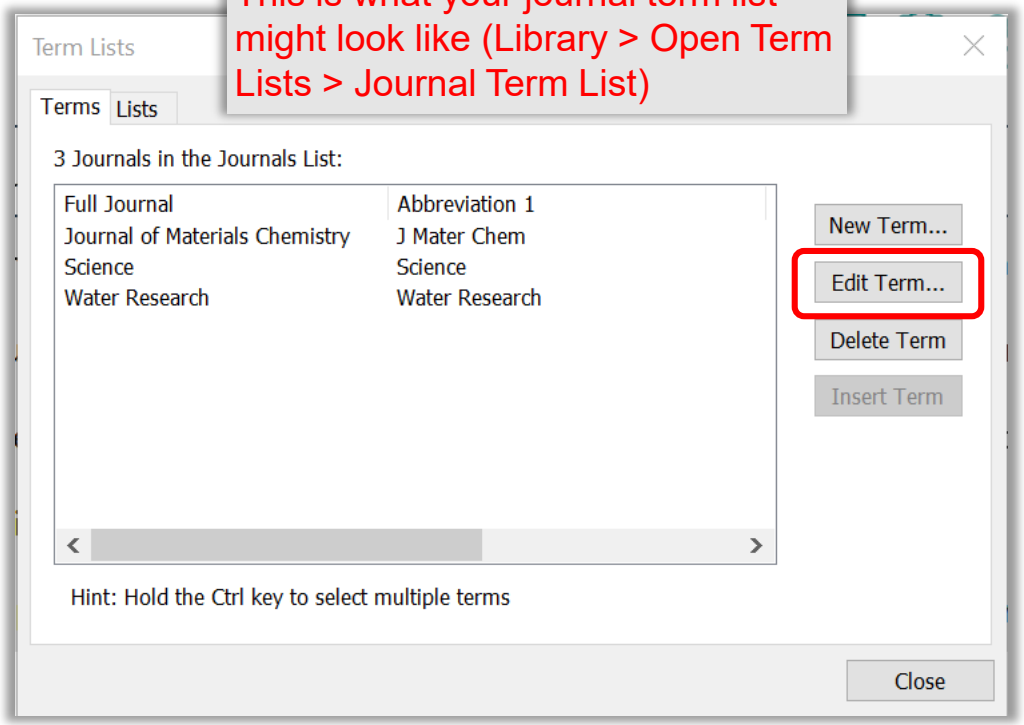
- Some journals require the journal title to be abbreviated in the bibliography



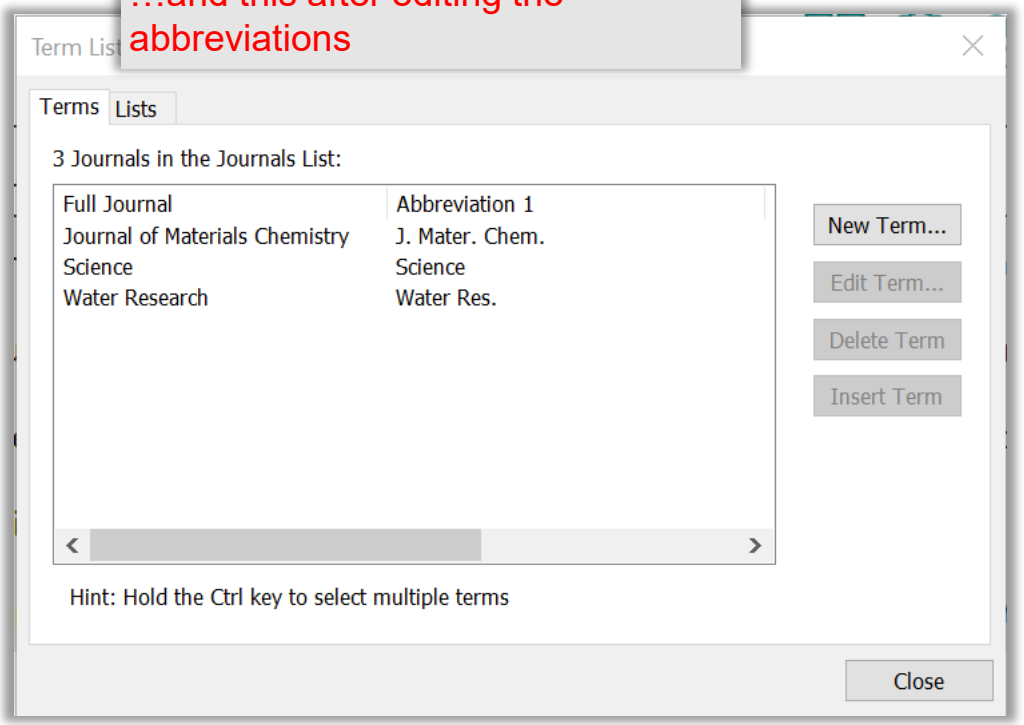
- The full title and up to 3 abbreviations for journals can be defined in a so called journal <Term List>
- EndNote
  - by default, copies the content of the reference field <Alternate Journal> as <Abbreviation 1> into a linked journal <term list>.
  - allows the import of built-in journal <term lists> (ASCII files)
  - 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 (Library > Open Term Lists > Journal Term List)

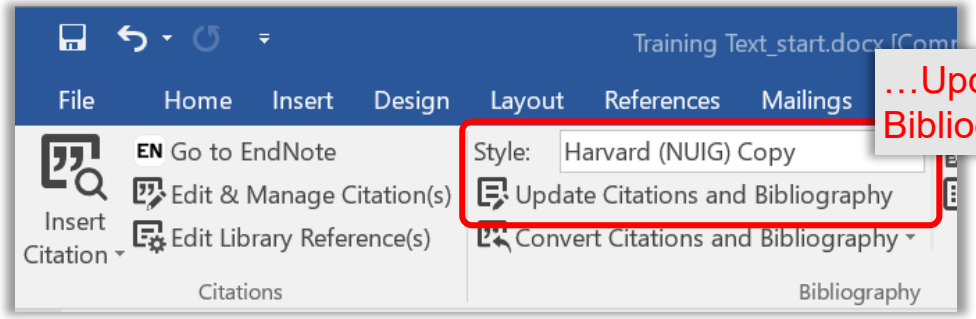


…and this after editing the abbreviations



- Tip: If you are having troubles finding 'correct' abbreviations see https://www.lib4ri.ch/journal-directories-useful-websites#Journal-Title-Abbreviations
- 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

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*,Berlin, Heidelberg: Springer Berlin Heidelberg. pp. 1149-266.

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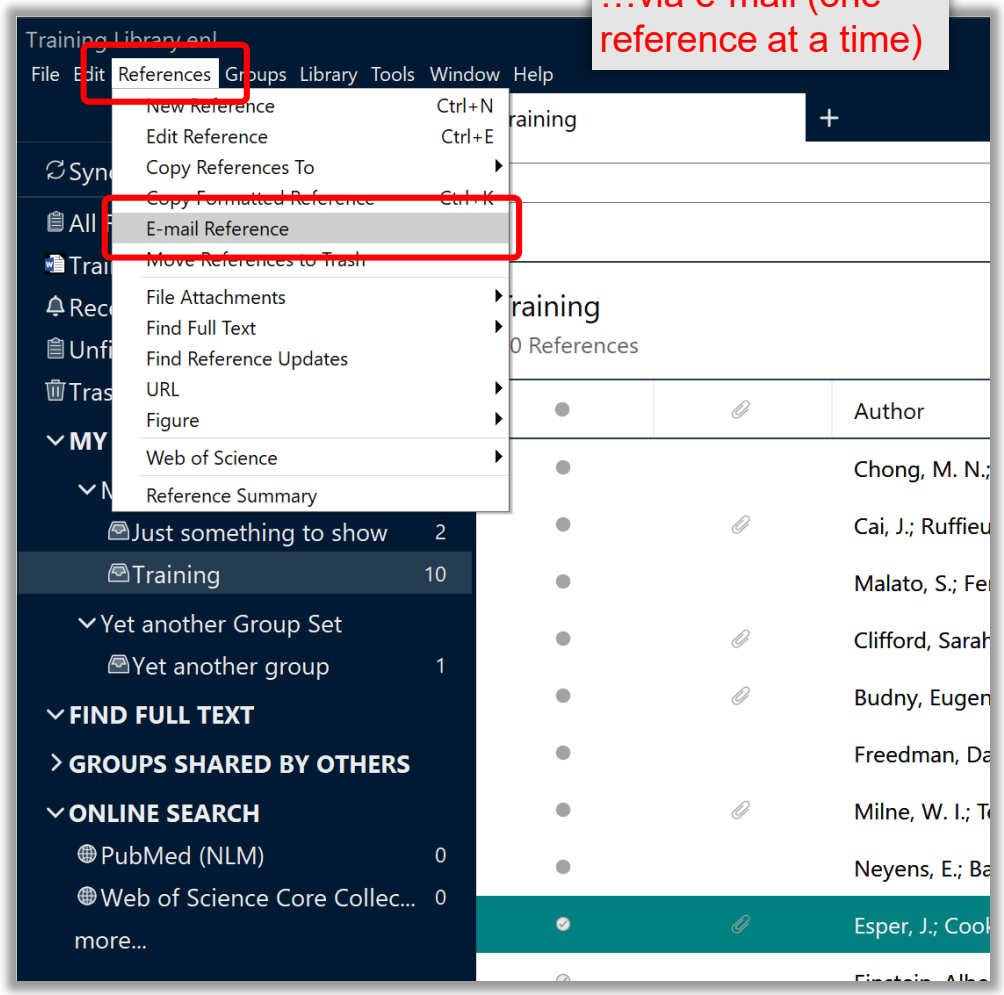
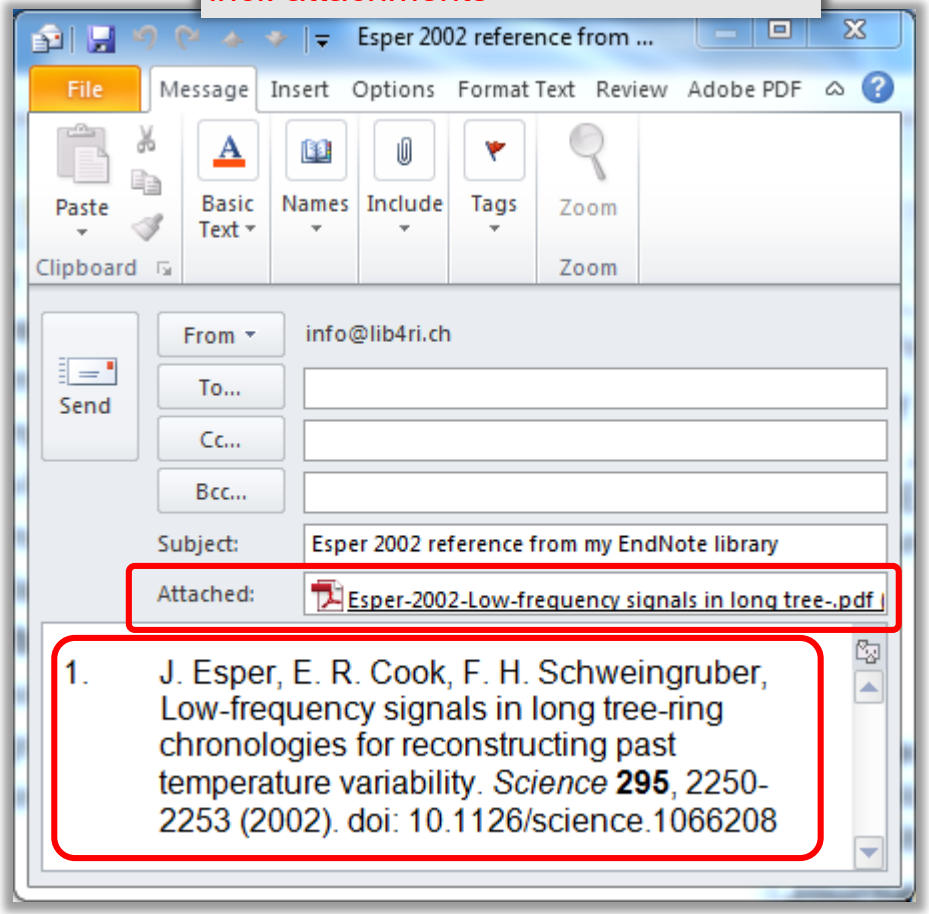
Sharing without an EN Online Account

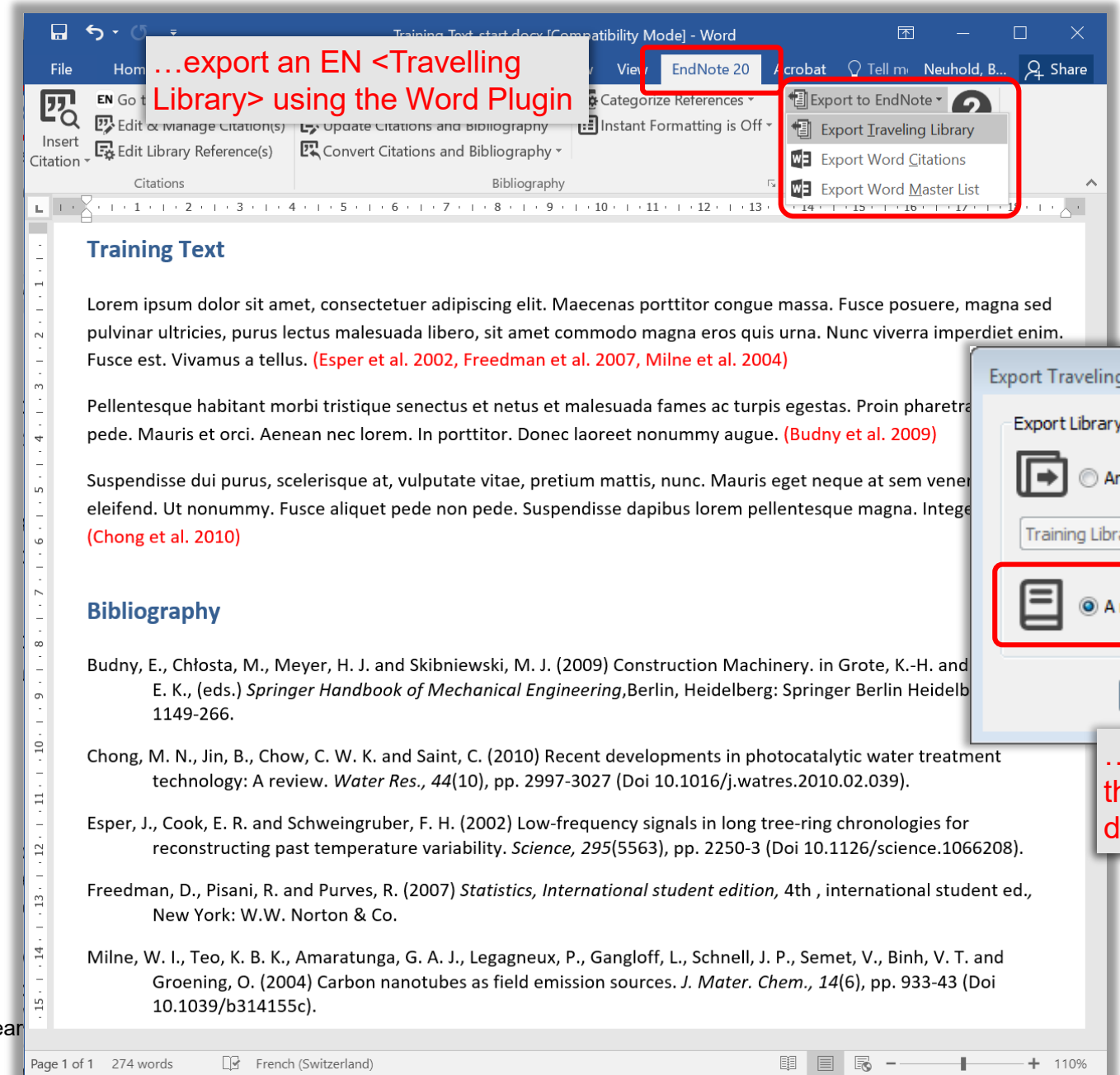
…via e-mail (one reference at a time)



… formatted according to your style, incl. attachments



Sharing without an EN Online Account



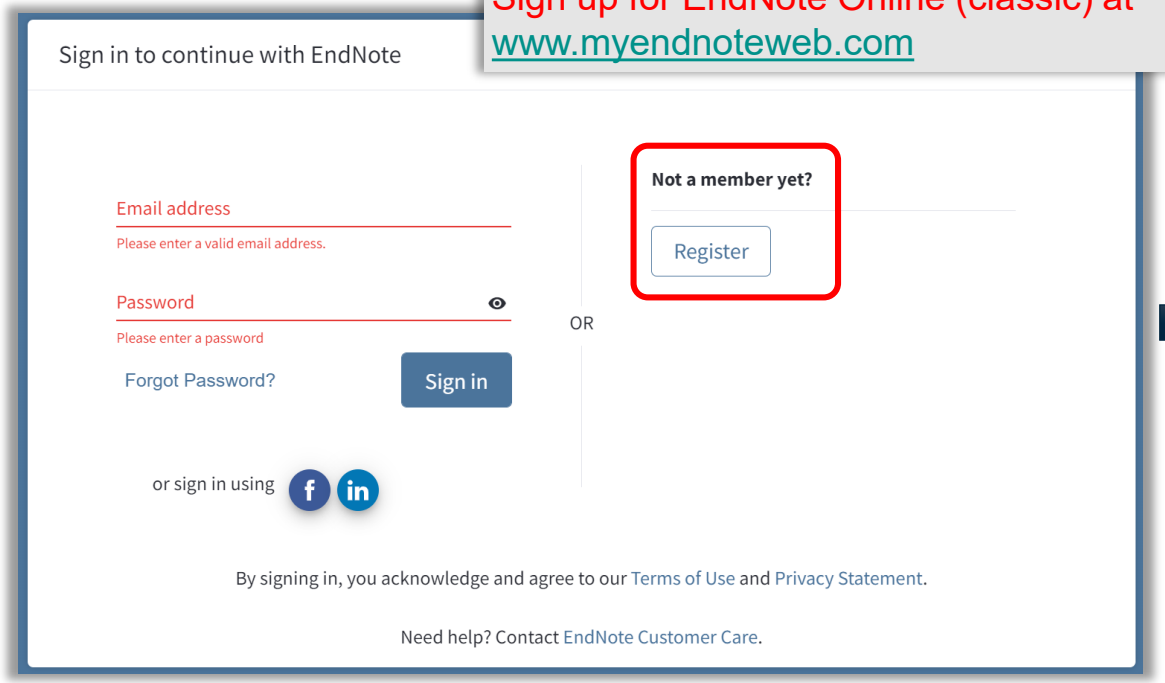
CC BY

Sharing without an EN Online Account

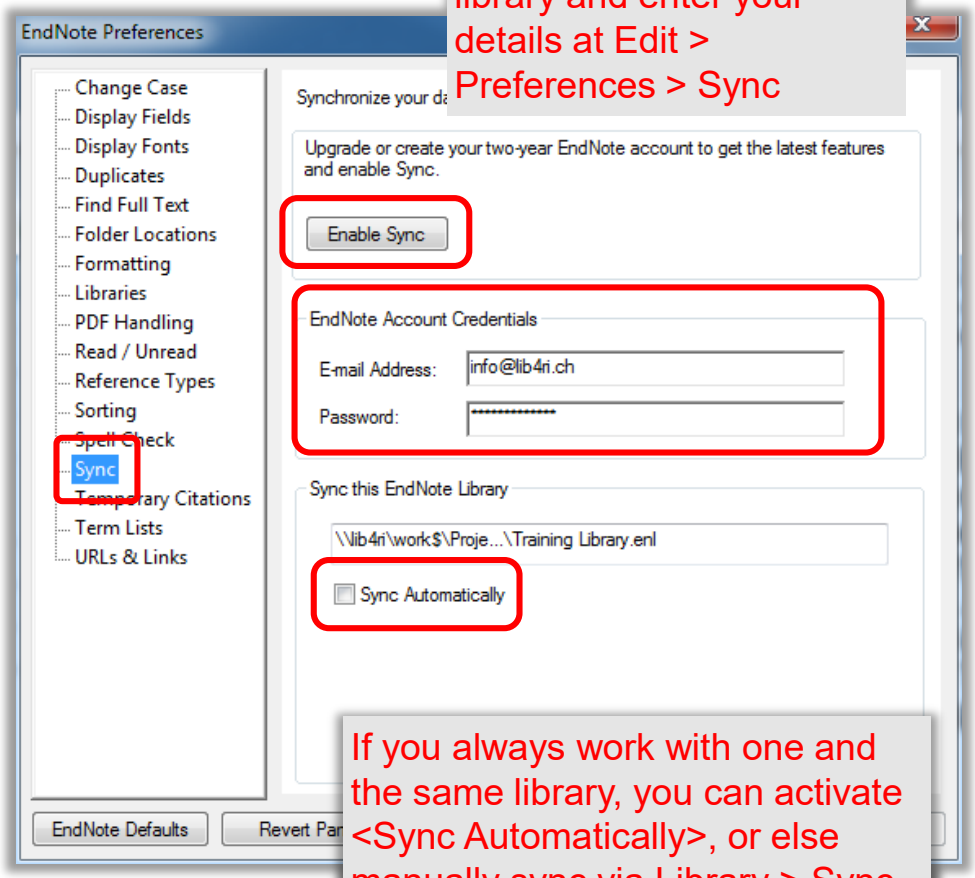
- **Share your library (or groups thereof) by using EN's compress library feature**
  - The entire library or just groups incl. attachments can be compressed in one single file (refer to backup)
- **Share your library via an institutional server**
  - Put your library on a shared server
  - One person 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**
  - 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 Library > Recover Library

Share & Sync using your EN Online Account (Classic)

Sign up for EndNote Online (classic) at www.myendnoteweb.com



Open your EN 20/21 library and enter your details at Edit > Preferences > Sync

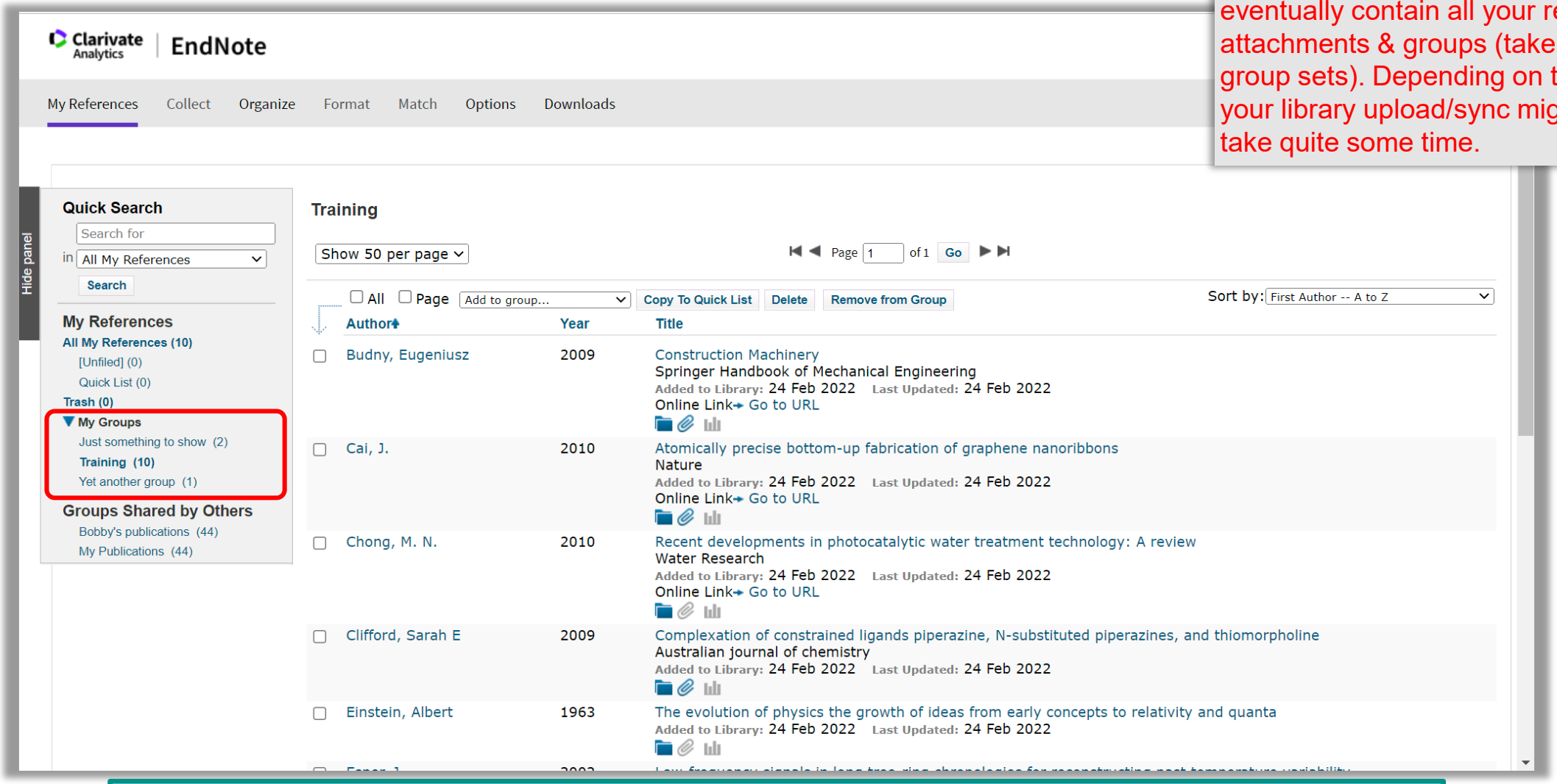


If you always work with one and the same library, you can activate <Sync Automatically>, or else manually sync via Library > Sync

- Tip: Important - Backup your library prior to enabling Sync
- Tip: Important - Should you have an account with Clarivate Analytics (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 (incl. attachments, no smart groups)

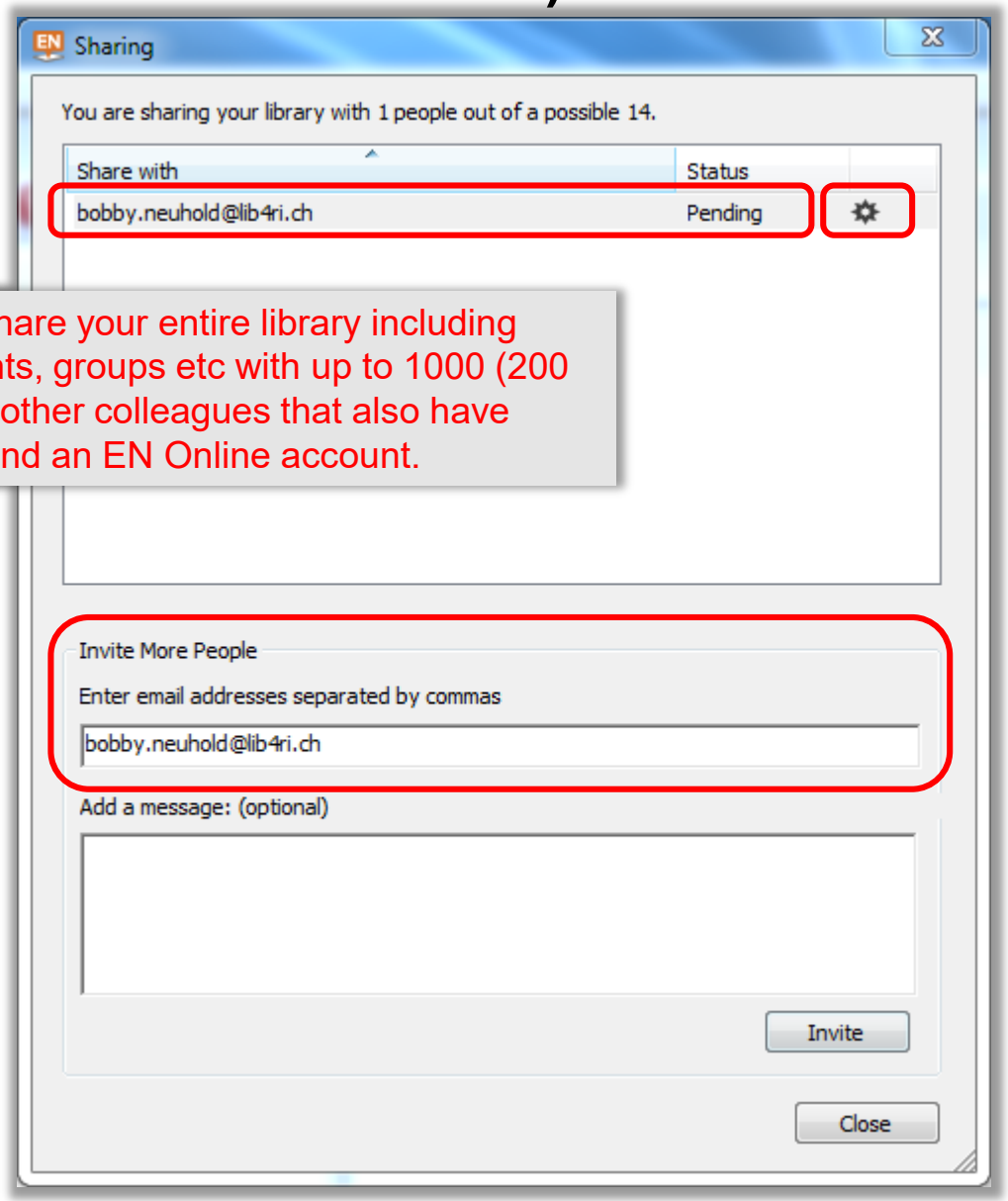
Share & Sync using your EN Online (classic)

Your EN Online account will eventually contain all your references, attachments & groups (taken from all group sets). Depending on the size of your library upload/sync might actually take quite some time.



- 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 from within Endnote (via your linked EN Online Account)

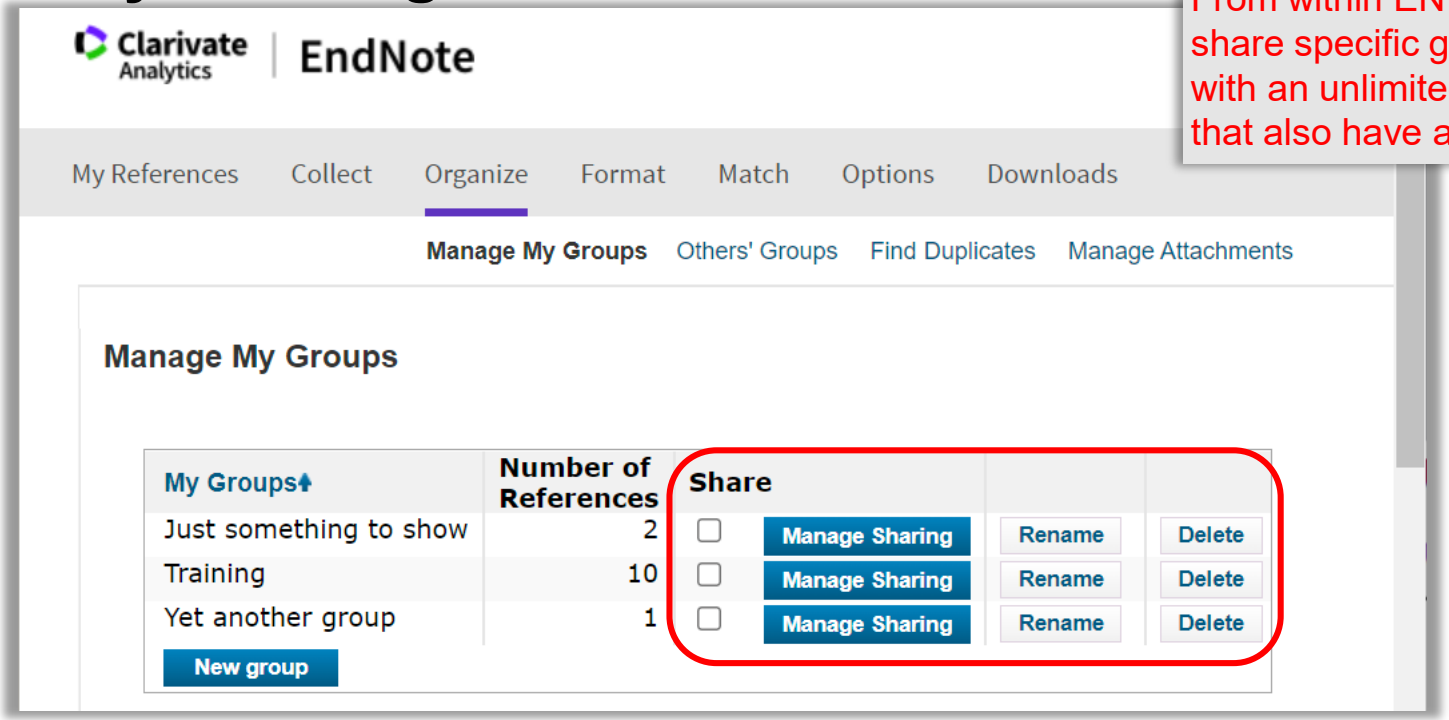


You can share your entire library including attachments, groups etc with up to 1000 (200 for EN20) other colleagues that also have Endnote and an EN Online account.

- 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 ⚙
- Read/write permissions can be defined for individual members of shared libraries.
- User changes are protocolled.
- Although EN 20/21 allow sharing of individual groups as well (right-click on the group > share group), the group will only be linked via an URL to EN Online (no attachments)

Share & Sync Using an EN Online Account

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



- Tip: Groups shared via EN Online (classic) are only accessible via EN Online (classic)
- Tip: EndNote Online (classic) is a fully functional Reference Manager with limited functionality.
- Guides:
  - www.endnote.com > Training

Introduction to EndNote

EN's GUI

- Create a new library (11)
- Graphical User Interface (12)

Collect

- EndNote's built-in online search (16)
- Export / import after an external database search (19)
- Import metadata from PDFs (24)
- Manually adding & altering references (25)
- Find & attach full text PDFs (27)

Organise

- Building groups (31)
- Checking & Updating references (32)
- Finding duplicates (33)
- Searching references (incl. PDFs & annotations) (34)
- Backing up your library (35)

Cite

- Bibliographic output styles (37)
- Cite-while-you-write (MS Word) (42)
- Using journal abbreviations (46)

Share & Sync

- Without EN Online Account (50)
  - Share references via E-mail
  - Share travel library via Word plugin
  - Share library as a compressed library or via servers
- With EN Online Account (53)
  - Sync between your devices
  - Share entire library
  - Share groups

Concluding Info, Help & Useful Links

- EndNote can do more (58)
- Is EndNote the right thing for me (59)
- User Guides & Tutorials, Support / Knowledge Base, Community, FAQ (61)

EndNote can do more…

- Categorise bibliographies (e.g. 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
- …

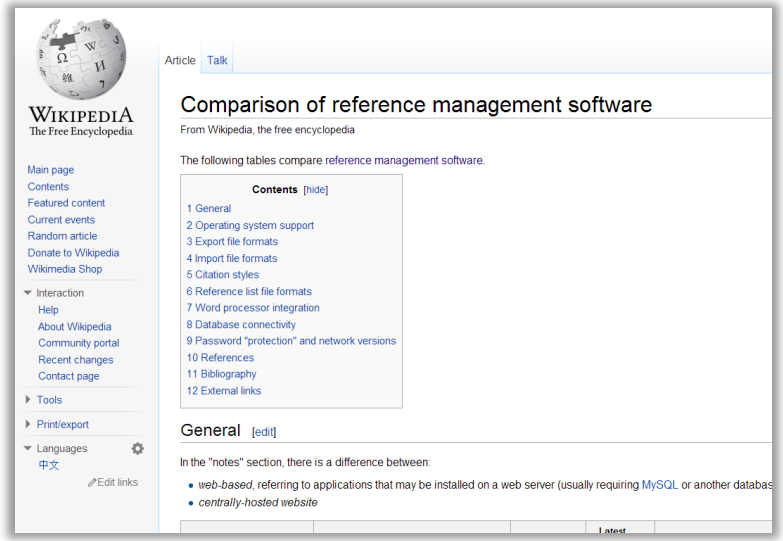
Be explorative

…but never
without a backup

Is EndNote the right thing for me?

- A quick comparison sheet (EndNote, Mendeley, Zotero) is available for download (www.lib4ri.ch/trainings)

Is EndNote the right thing for me?

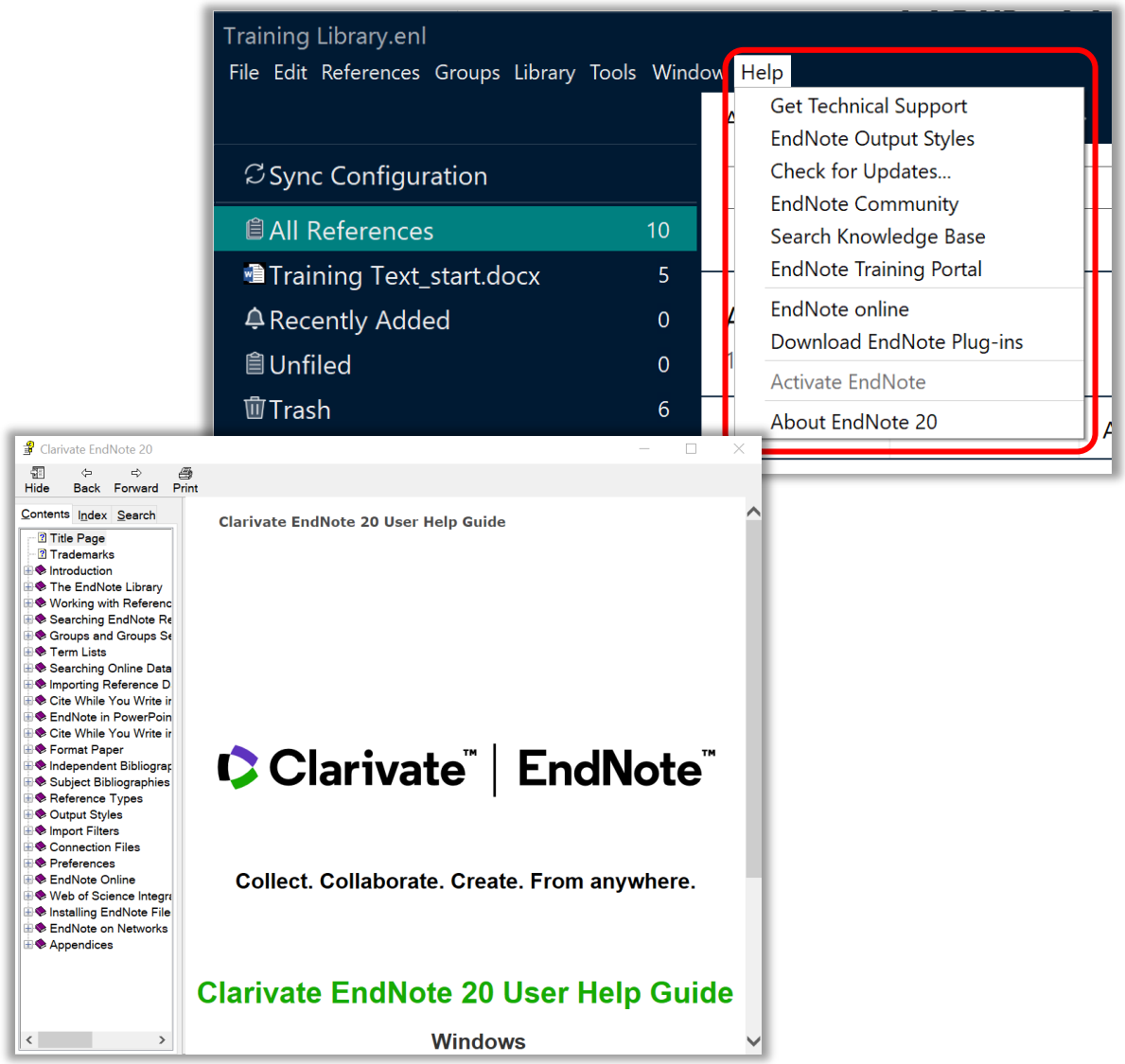


- Comprehensive comparisons
  - Wikipedia > Comparison of reference management software
  - Digital Collection Management TU Munich (https://mediatum.ub.tum.de/1127579)

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

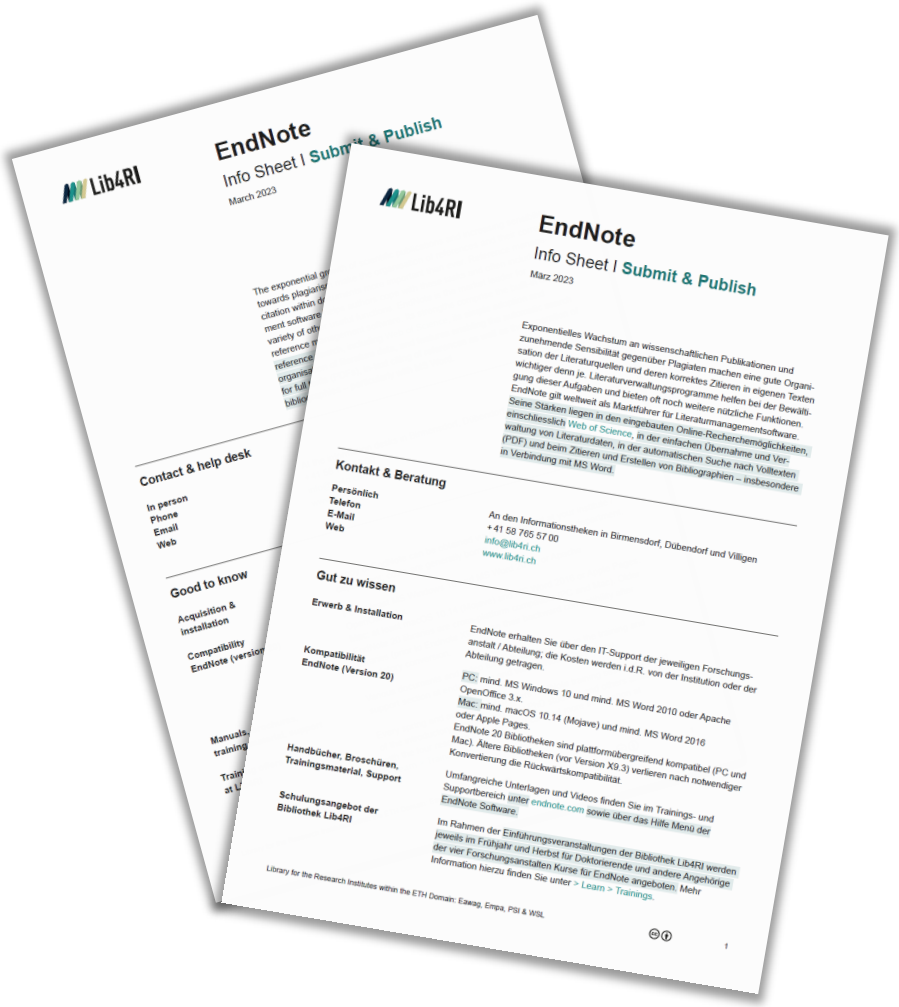
Help, User Guides & Tutorials

- **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



Lib4RI EndNote Quick Guide

- Lib4RI's Info covers relevant essentials to work with EndNote 20/21
- Download it via our website: https://www.lib4ri.ch/info-sheets-videos



Useful Links

- **Downloads**
  - https://endnote.com/downloads
- **User Guides, Help, Tutorials, Training Videos & Classes**
  - https://endnote.com > Support
- **Support / Knowledge Base, Community, FAQ**
  - https://endnote.com > Support
    - Do’s and Don’ts & more
  - https://endnote.com > FAQ

Thank you!

Stephanie Hofmann, Bobby Neuhold
Lib4RI - Library for the Research Institutes within the ETH Domain:
Eawag, Empa, PSI & WSL

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