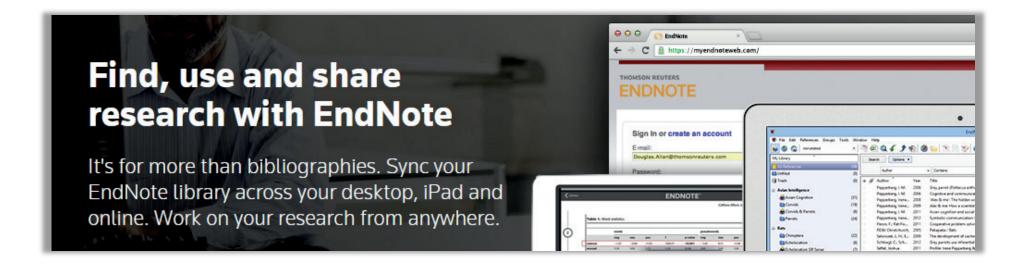


Spring 2024

# Literature Management with Endnote

Stephanie Hofmann & Bobby Neuhold





# Accelerate your research

EndNote is a reference manager that helps you save time formatting citations, so you can focus on your research.

Screenshots www.endnote.com





# **Lib4RI Training Series**

- Module 1Searching Scientific Information
- Module 2Scientific Publishing: From Writing to Sharing
- o Module 3Open Access & Copyright
- Module 4a
   Literature Management with EndNote



- Module 4bLiterature Management with Zotero
- Module 5Getting Started with LaTeX
- Module 6Work on Your Own Project
- Module 7Research Data Management The Basics



# Searching & Managing Scientific Information

#### **Training series**

Spring 2024

#### Modules: Searching Scientific Information 2 Scientific Publishing – From Writing to Sharing 3 Open Access & Copyright 4a Literature Management with EndNote 4b Literature Management with Zotero 5 Getting Started with LaTeX 6 Work on Your Own Project 7 Research Data Management - The Basics Course sites: Eawag: Dübendorf Empa: Dübendorf PSI: Villigen WSL: Birmensdorf Online registration: www.lib4ri.ch/trainings



# **Module 4a – 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





# Why Literature Management & Software?

#### **Literature / Information Sources**

- Books & book chapters
- Articles in journals & newspapers
- Conference proceedings
- Web pages
- Databases
- Software
- o 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
  - o Desktop & Laptop
  - o Web
  - Smartphone & tablet
- Share content with colleagues
- Use library for the writing of reports, articles, theses
  - o cite references in your text
  - o 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
  - o PC, Mac, ...
  - Online / Web
  - o iOS / Android
- Share & collaborate
- Import / export metadata (& PDFs) from / to other reference management software
- 0 ...



# Reference Management Software



























Papers



... and more





# **Common Reference Management Software**

# **EndNote (formerly Thomson Reuters, since 2017 Clarivate Analytics)**

- o 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/
- o 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)</li>
- o www.zotero.org

#### Mendeley (Elsevier)

- o Mendeley Desktop (☺ but legacy) & Mendeley Reference Manager (☺ PC, Mac, Linux)
- o free ≤ 2Gb, ≤ 5 private groups, ≤ 25 group members (cloud space expandable, \$\$)
- o sharing / networking / online collaboration
- o www.mendeley.com





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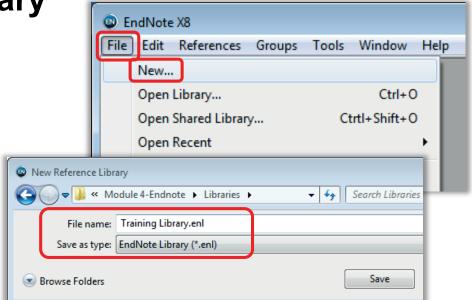
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# **Create a New EndNote Library**



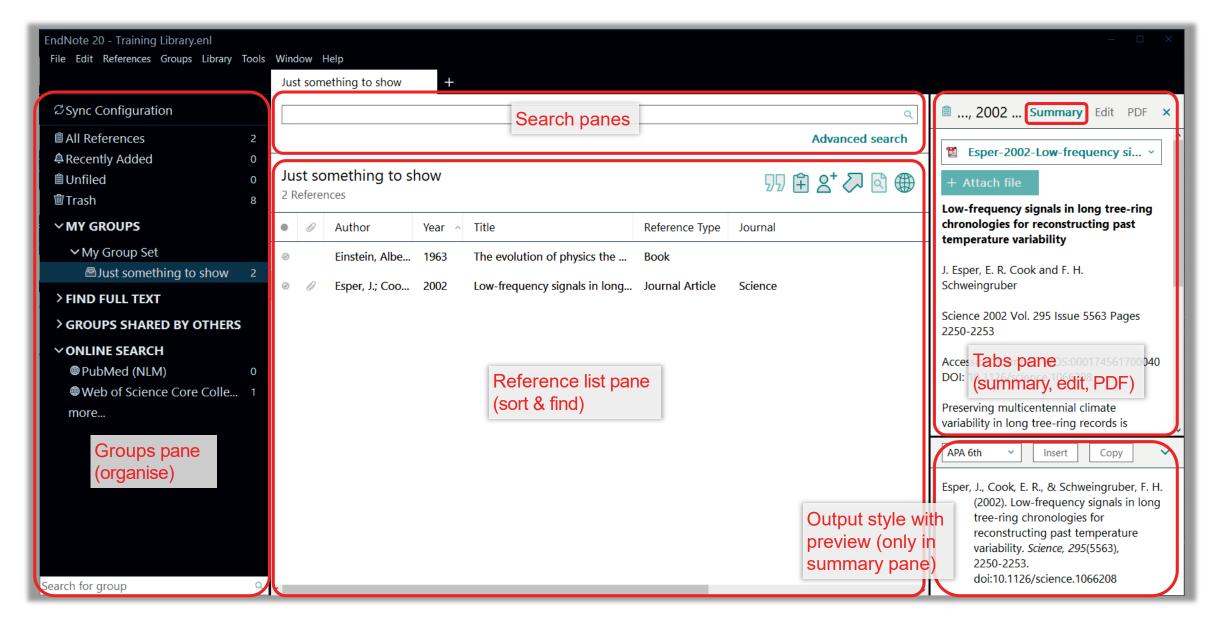


- Tip: EndNote generates an \*.ENL file and a \*.DATA folder that need to stay together.
- Tip: While the \*.ENL file is the library with all metadata, the \*.DATA folder is the default location for attachments and also contains library related indexing files.

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.

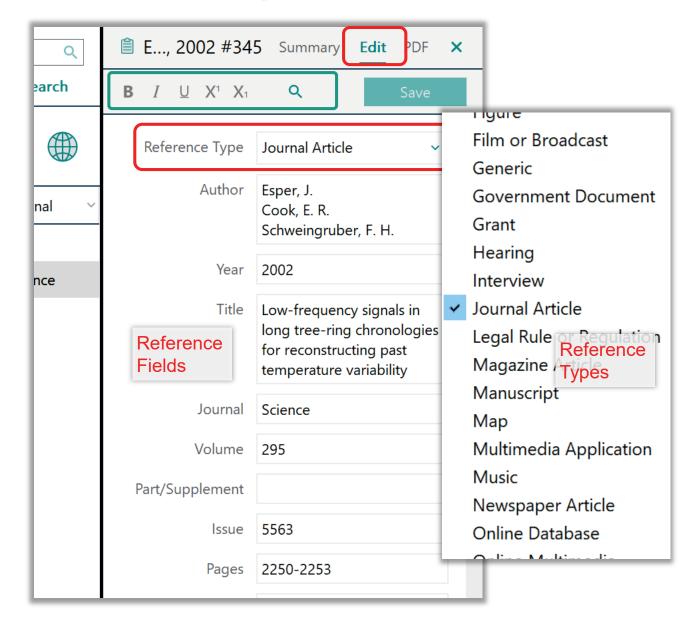


# **The Graphical User Interface – Main View**



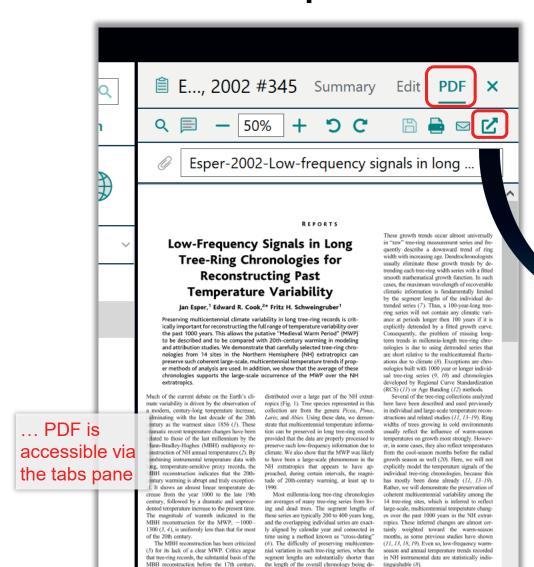


# **The Graphical User Interface – Main View**



- 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



Esper-2002-Low-frequency signals in long tree-.pdf (Training Library.enl) Q = 1 /5 V - 80% + 5 C 1300 (3, 4), is uniformly less than that for most of the 20th century. The MBH reconstruction has been criticized

REPORTS Low-Frequen Signals in Long Tree-Ring nologies for Reconstructing Past re Variability Temper Cook,2\* Fritz H. Schweingruber1 Preserving multicent limate variability in long tree-ring records is crittructing the full range of temperature variability over ically important for is allows the putative "Medieval Warm Period" (MWP) the past 1000 y to be compared with 20th-century warming in modeling studies. We demonstrate that carefully selected tree-ring chrorom 14 sites in the Northern Hemisphere (NH) extratropics can reserve such coherent large-scale, multicentennial temperature trends if proper methods of analysis are used. In addition, we show that the average of these chronologies supports the large-scale occurrence of the MWP over the NH Much of the current debate on the Earth's clidistributed over a large part of the NH extratmate variability is driven by the observation of ropics (Fig. 1). Tree species represented in this a modern, century-long temperature increase, collection are from the genera Picea, Pinus, culminating with the last decade of the 20th Larix, and Abies. Using these data strate that multicentennial temperature informacentury as the warmest since 1856 (1). These tion can be preserved in long tree ring records dramatic recent temperature changes have been provided that the data are properly processed related to those of the last millennium by the Mann-Bradley-Hughes (MBH) multiproxy reclimate. We also show that the MVP was likely construction of NH annual temperatures (2). By combining instrumental temperature data with to have been a large-scale phenomenon in the long, temperature-sensitive proxy records, the NH extratropics that appears to MBH reconstruction indicates that the 20thproached, during certain intervals, the magnicentury warming is abrupt and truly exceptiontude of 20th-century warming, at least up to al. It shows an almost linear temperature decrease from the year 1000 to the late 19th century, followed by a dramatic and unprecedented temperature increase to the present time. The magnitude of warmth indicated in the MBH reconstruction for the MWP. ~1000-

that tree-ring records, the substantial basis of the

MBH reconstruction before the 17th century,

cannot preserve long-term, multicentennial tem-

perature trends. This contention is of fundamen-

tal importance because if tree-ring reconstruc-

tions are limited in this way, then including such

(5) for its lack of a clear MWP. Critics argue the purpose of climatic reconstruction (6)

These growth trends occur almost universally in "raw" tree-ring measurement series and fre-...or in a separate window. smooth Comments, annotations, printing and emailing is ring ser possible explicitly del

term trends in millennia-length tree-ring chronologies is due to using detrended series that are short relative to the multicentennial fluctuations due to climate (8). Exceptions are chronologies built with 1000 year or longer individual tree-ring series (9, 10) and chronologies developed by Regional Curve Standardization (RCS) (11) or Age Banding (12) methods. Several of the tree-ring collections analyzed here have been described and used previously in individual and large-scale temperature recon-

Consequently, the problem of missing long-

ans and related studies (11, 13–19). Ring widths of trees growing in cold environments usually reflect the influence of warm-season temper tures on growth most strongly. Howevpreserve such low-frequency information due to er, in some cases, they also reflect temperatures from the cool-season months before the radial growth season as well (20). Here, we will not ally model the temperature signals of the individual tree-ring chronologies, because this has mostly been done already (11, 13-19). Rather, we will demonstrate the preservation of coherent multicentennial variability among the 14 tree-ring sites, which is inferred to reflect large-scale, multicentennial temperature changes over the past 1000 years in the NH extratropics. These inferred changes are almost certainly weighted toward the warm-season months, as some previous studies have shown (11, 13, 18, 19). Even so, low-frequency warmseason and annual temperature trends recorded in NH instrumental data are statistically indistinguishable (8).

To preserve possible multicentennial growth trends due to climate, we analyzed the individual raw ring-width measurements using

veloped, results from the removal of age-related

biological growth trends that represent noise for

the purpose of climatic reconstruction (6).

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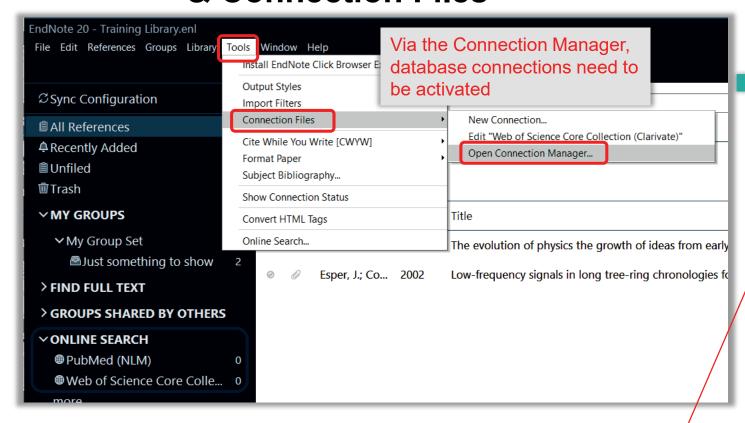
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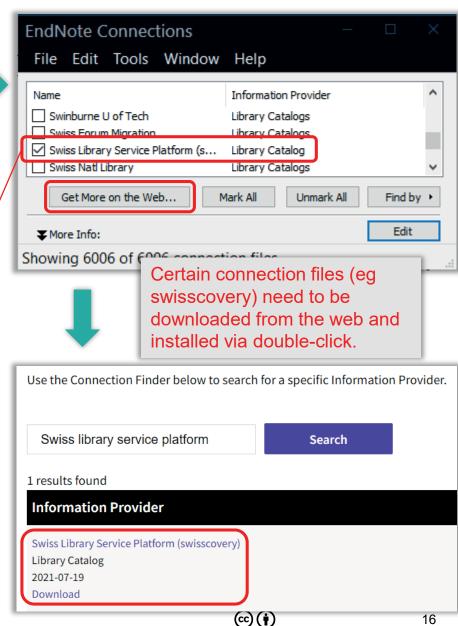




# Collect Metadata – EN's Built-in Online Search & Connection Files



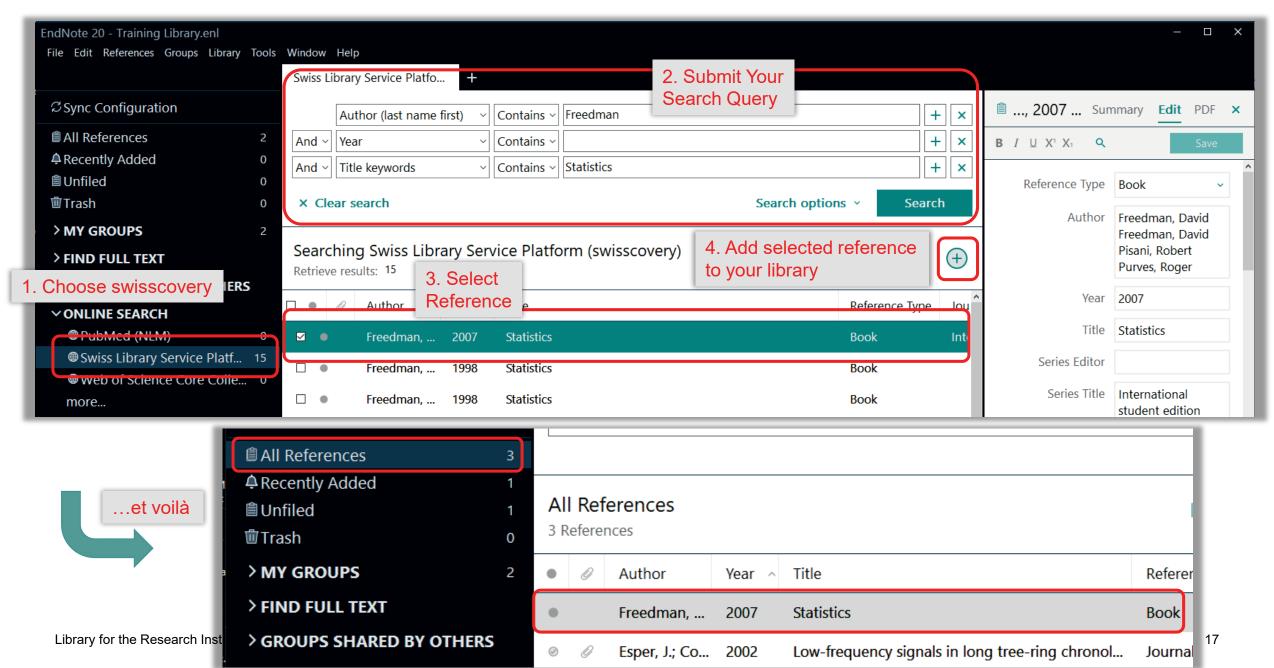
- By default, PubMed & Web of Science are activated; many library catalogues available
- Connection file to our library catalogue swisscovery. Scopus is NOT supported





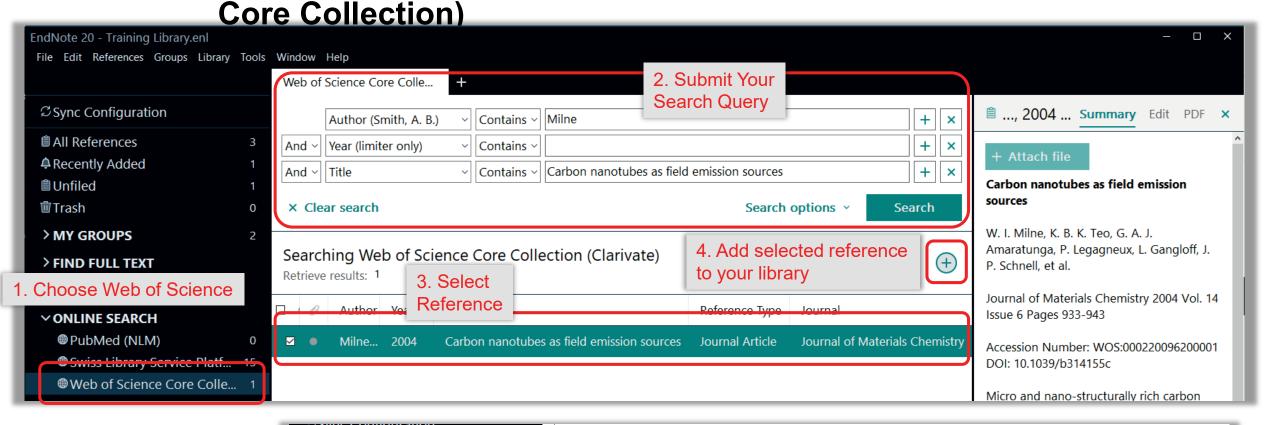
# **Collect Metadata – EndNote's Online Search (swisscovery)**

Endnote





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



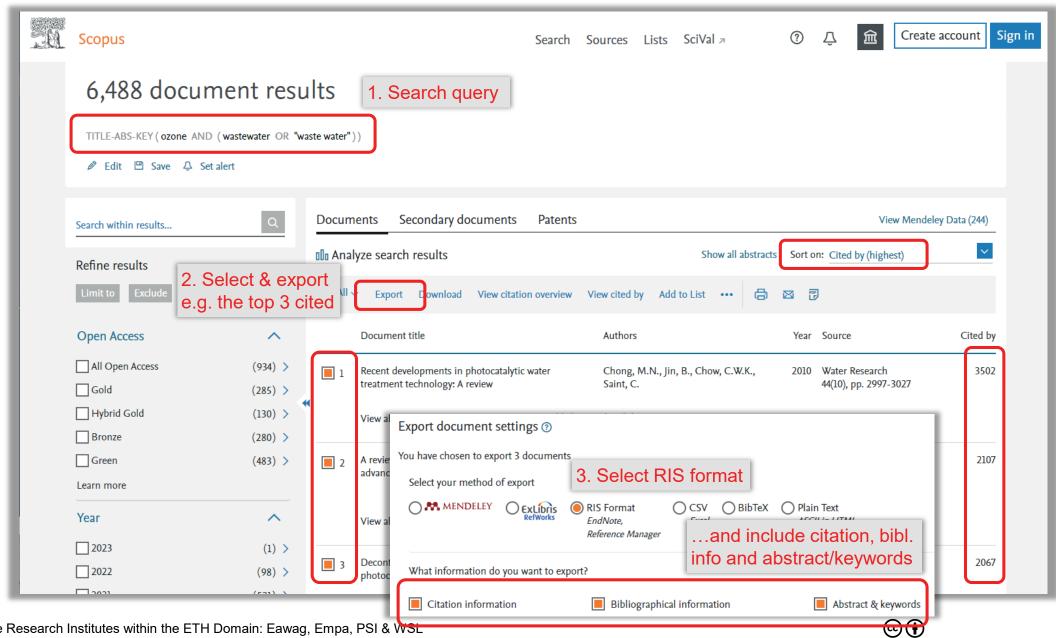






# Collect Metadata – External Database Search & Import (Scopus)

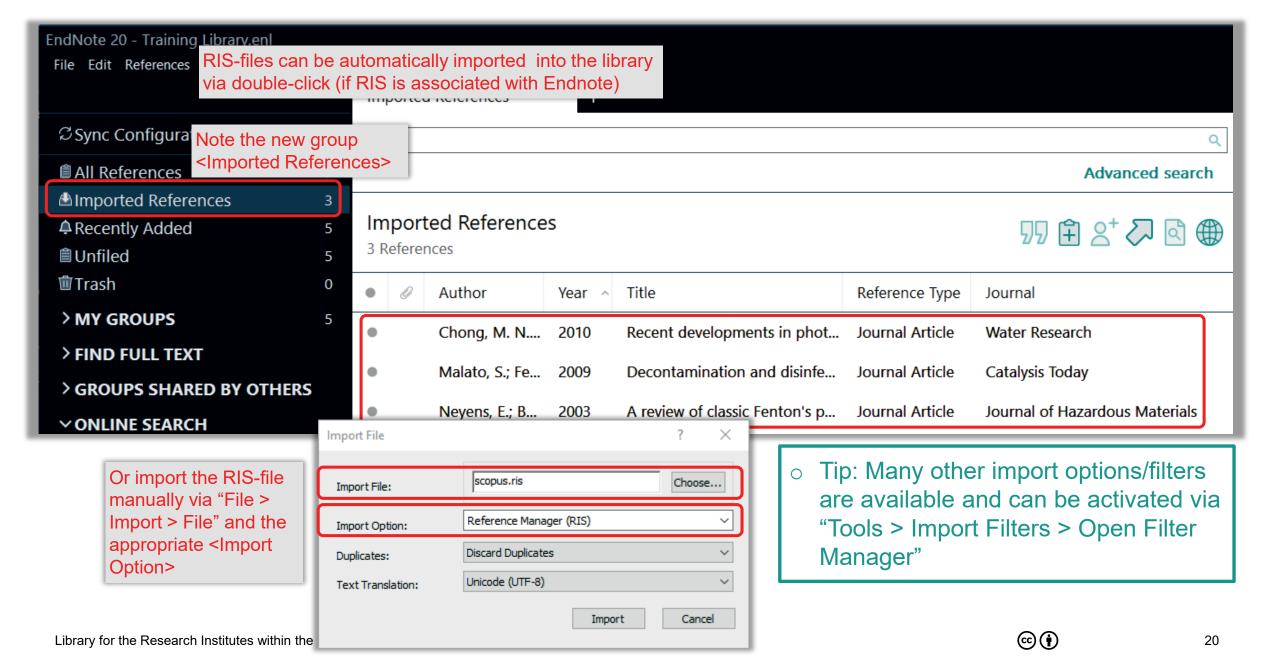
Endnote





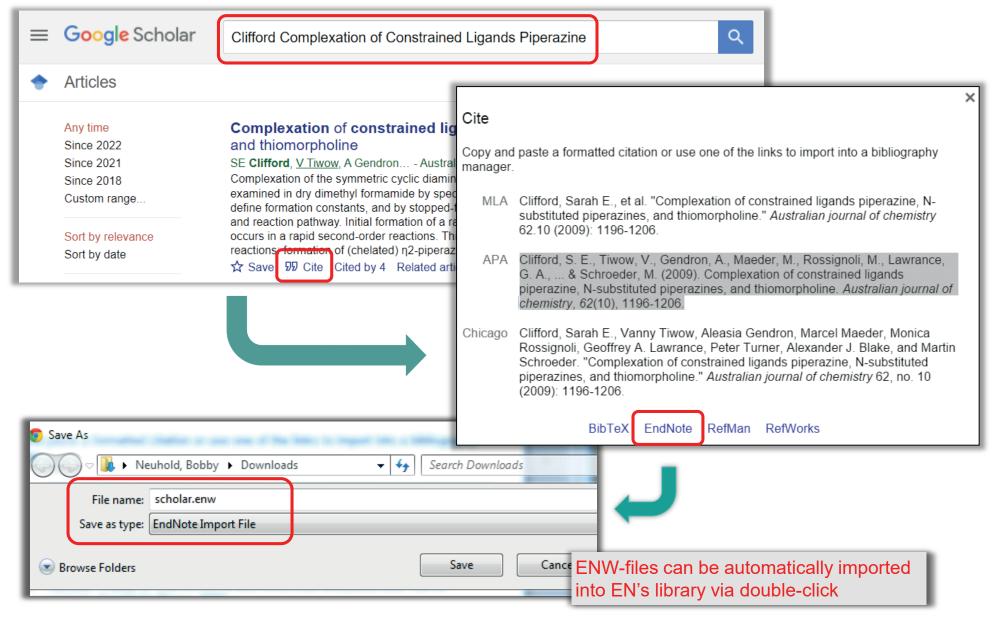
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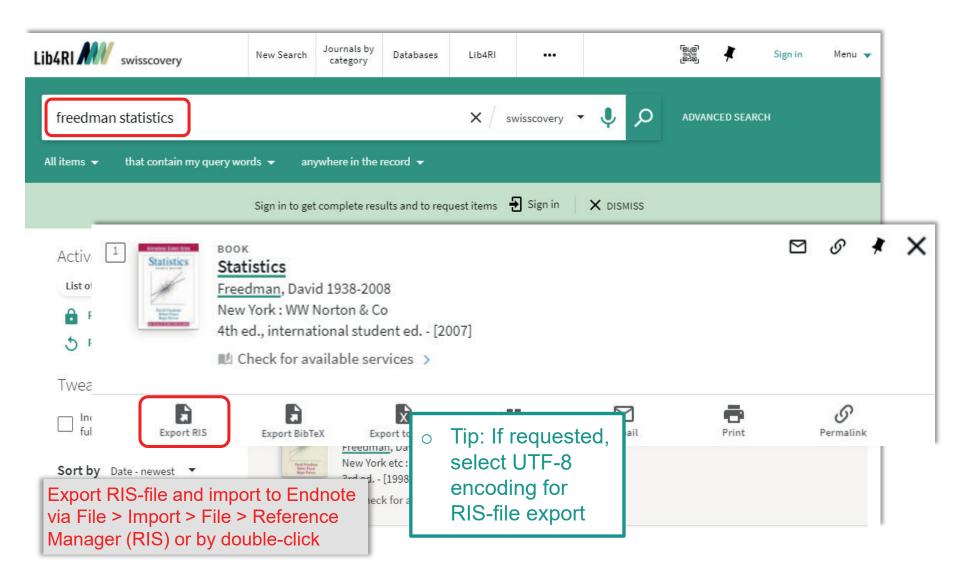




# Collect Metadata – External Search & Import (Google Scholar)

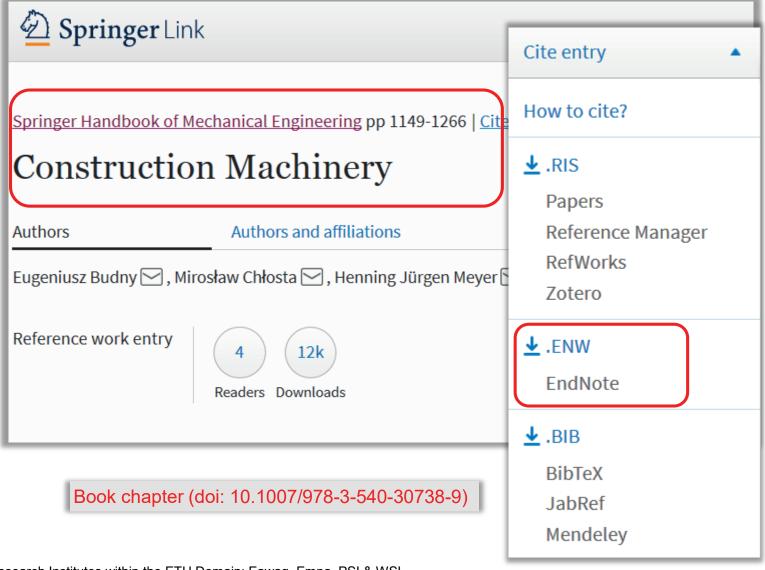








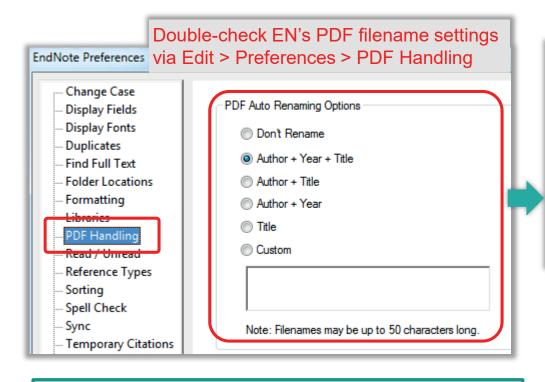
# **Collect Metadata – External Catalogue Search & Import (Publisher)**



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

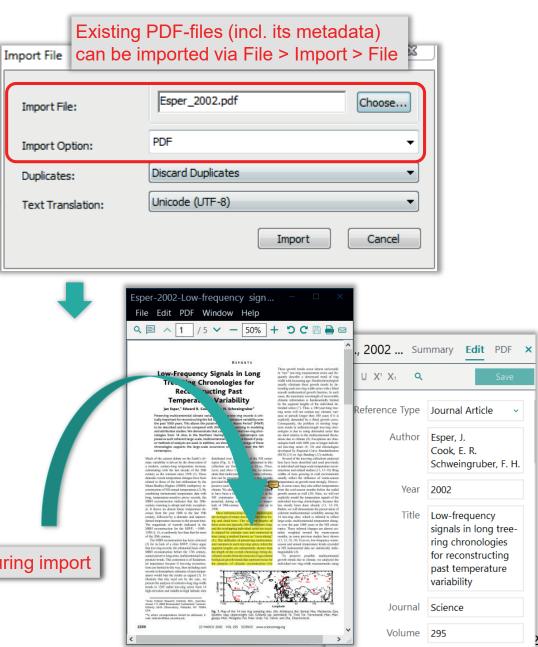


# **Collect Metadata – Extract Metadata from PDFs**



- 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

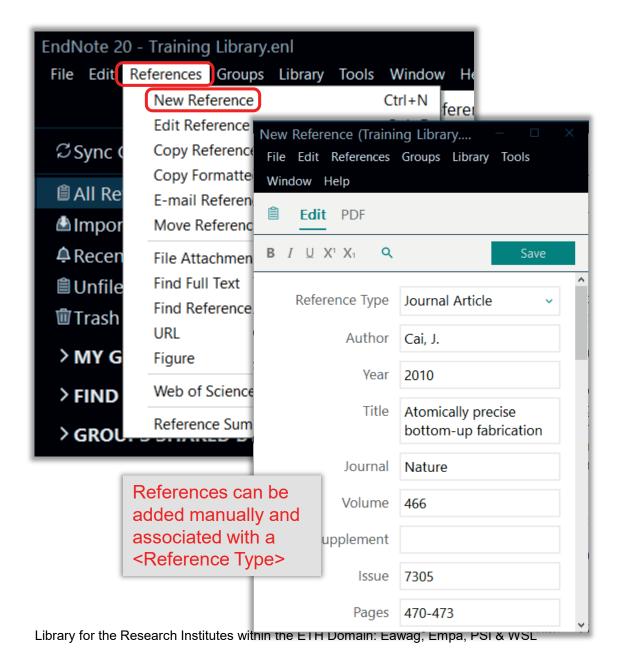
Existing PDF annotations are kept during import



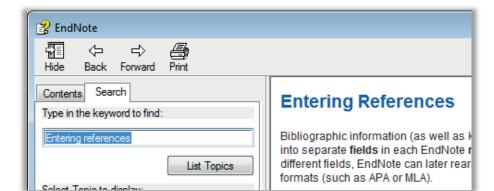
Part/Supplement



## **Collect Metadata – Manual Addition of references**

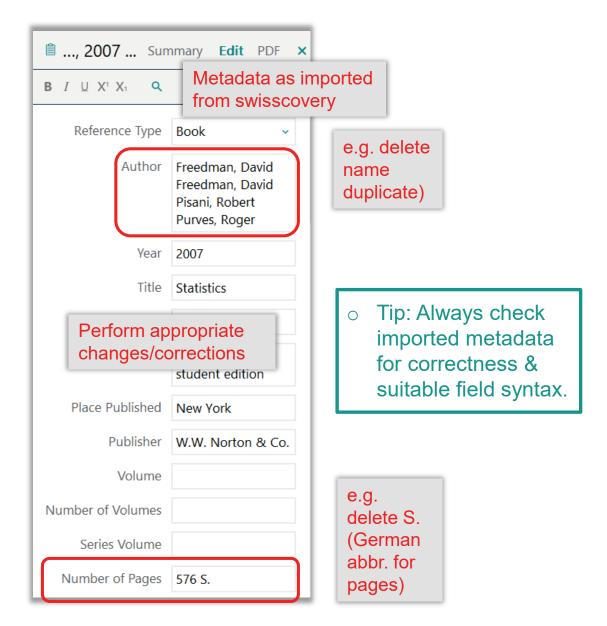


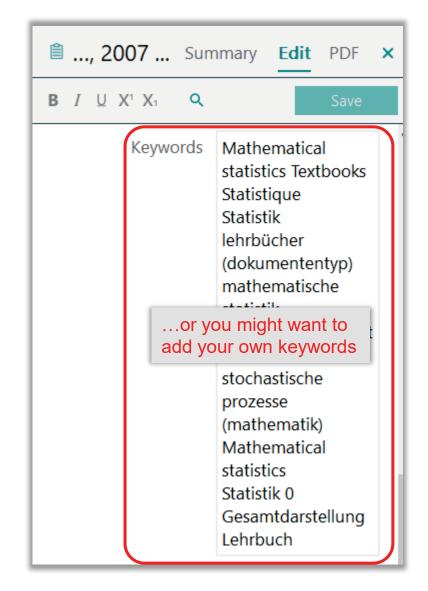
- For the manual addition of references you need to obey a certain syntax and rules regarding the input of the metadata into the respective fields
- Rules are pretty straightforward and their effect (for a given output style) can be seen in the bottom section of the summary tab
- Tip: Compare your syntax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





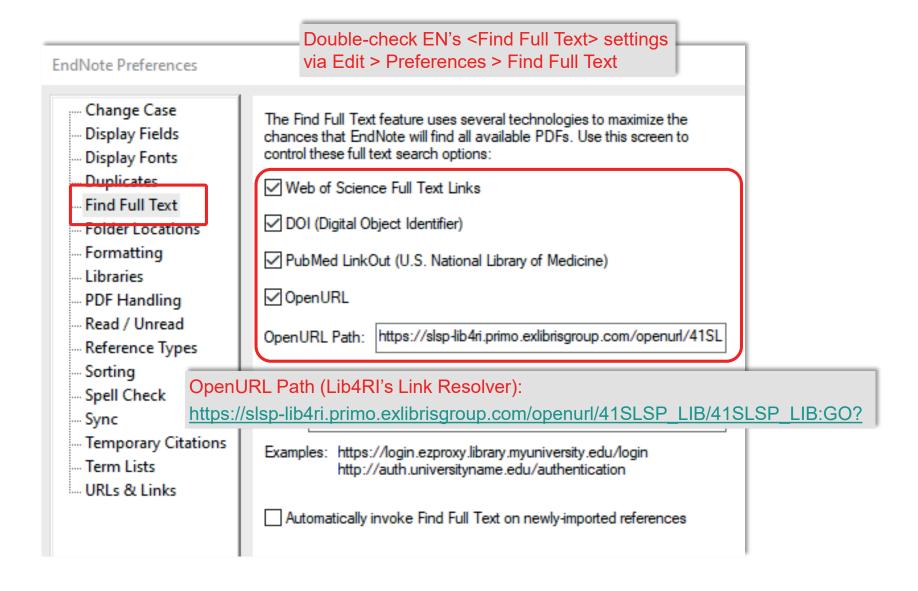
# **Collect Metadata – Manual Alteration / Editing of references**





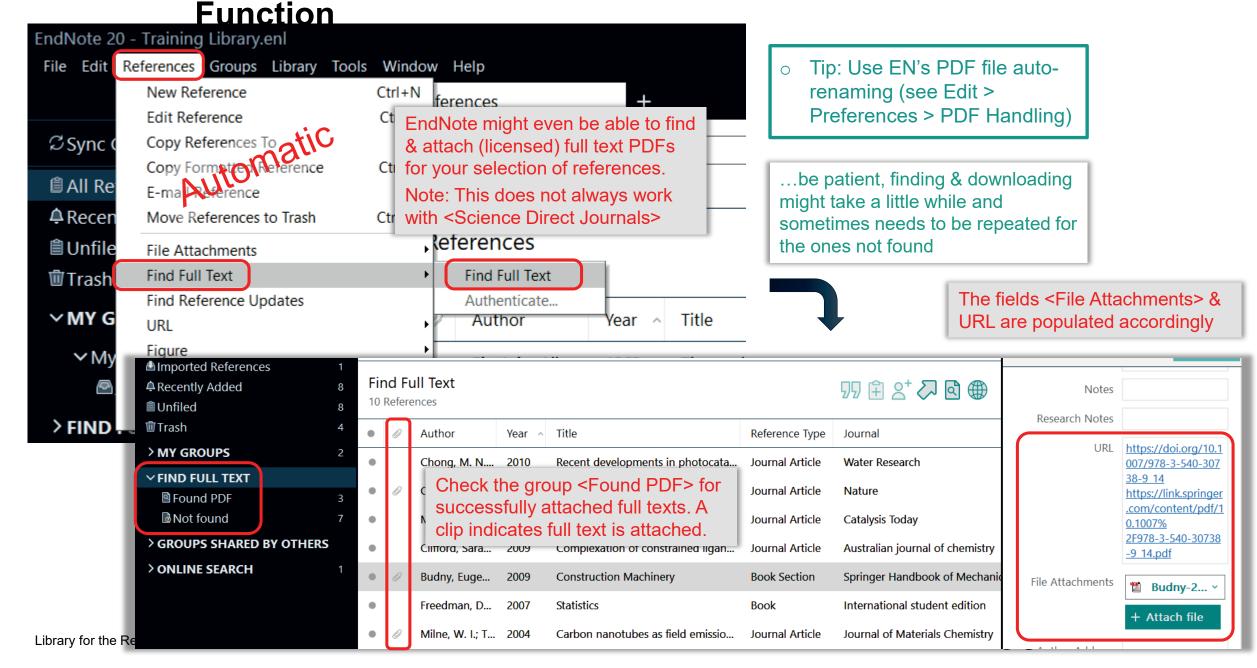


# Find & Attach Fulltext PDFs



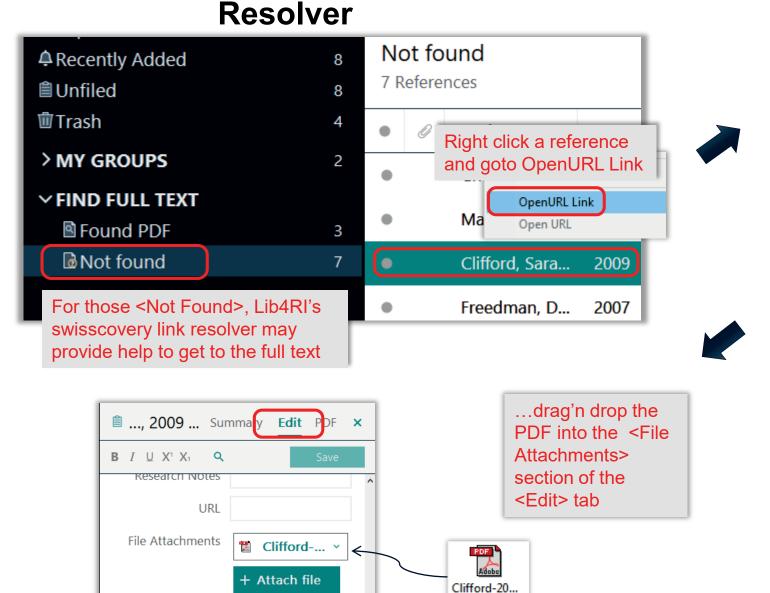


# Find & Attach Fulltext PDFs – EN's <Find Full Text>

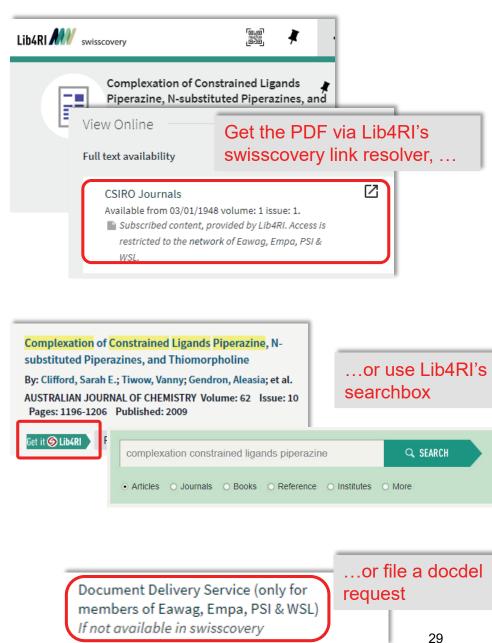




Find & Attach Fulltext PDFs – Lib4Rl's swisscovery Link



of constrai...



**Endnote** 



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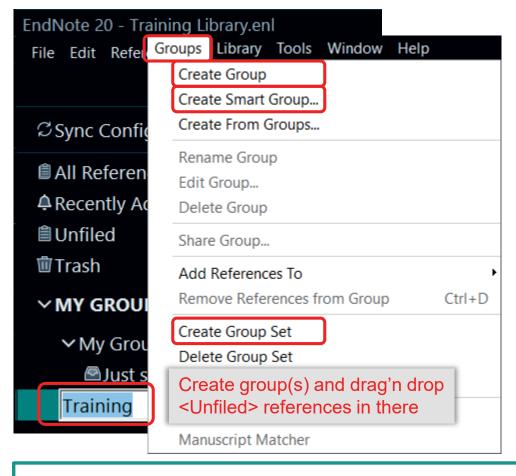
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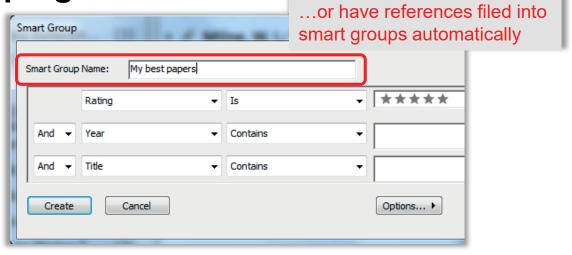
**Organising your Library – Grouping References** 

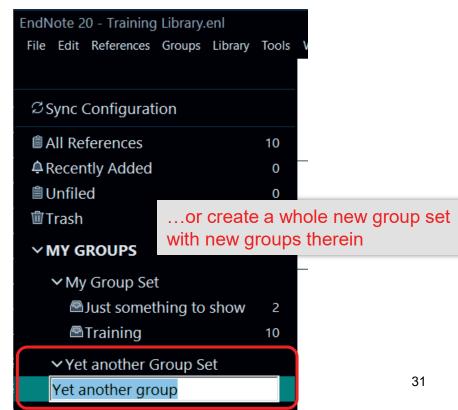
Endnote



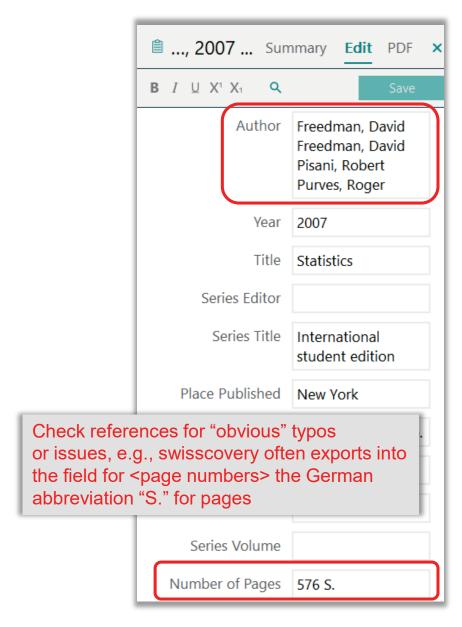


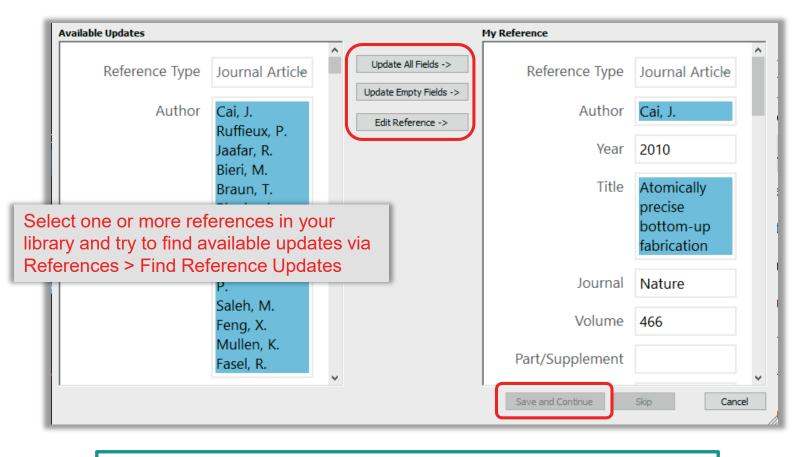
- Tip: Work with one library only and rather assign references to groups suiting your different purposes (eg your different papers, theses, ...
- Tip: One reference can be a member of multiple groups (no duplicates are created)





# Organising your Library – Checking & Updating References

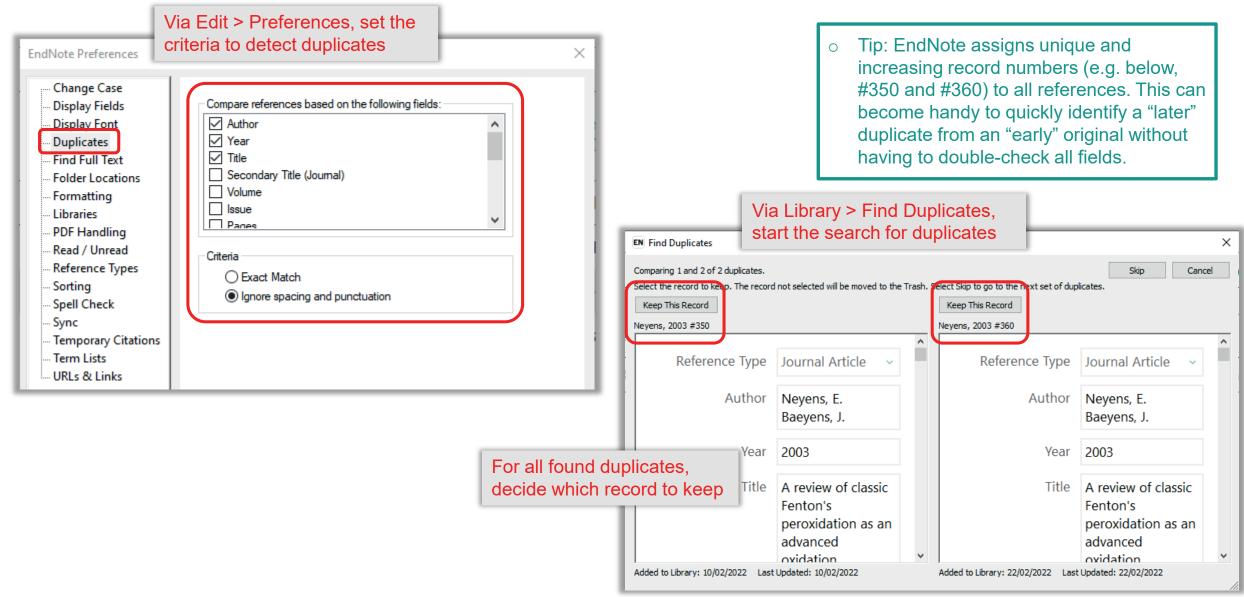




- Tip: If you don't want to update all or empty fields only; you can also just copy / paste individual fields via <Edit Reference> (requires to save manually).
- This tool is particularly handy for updating manually input and incomplete references

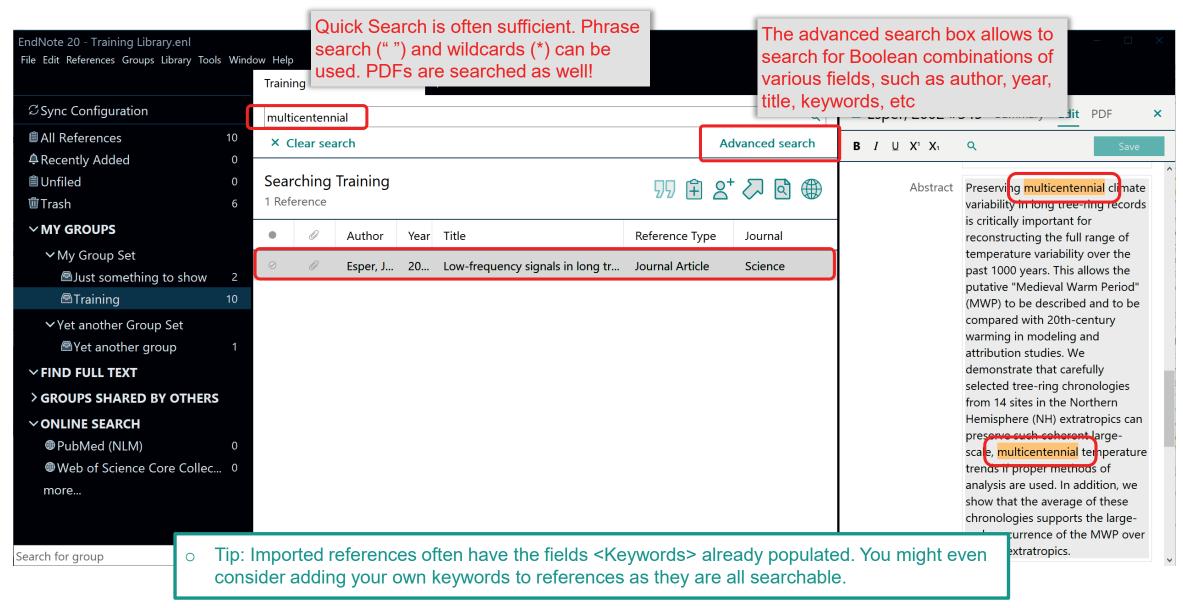


# **Organising your Library – Finding Duplicates**



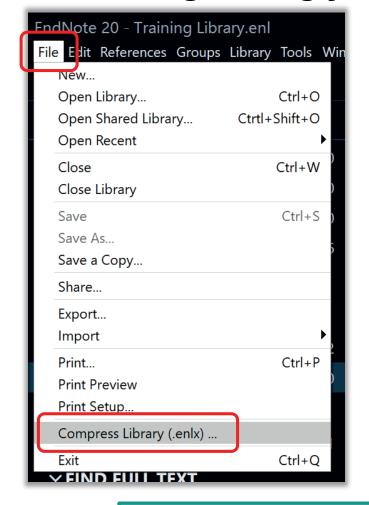


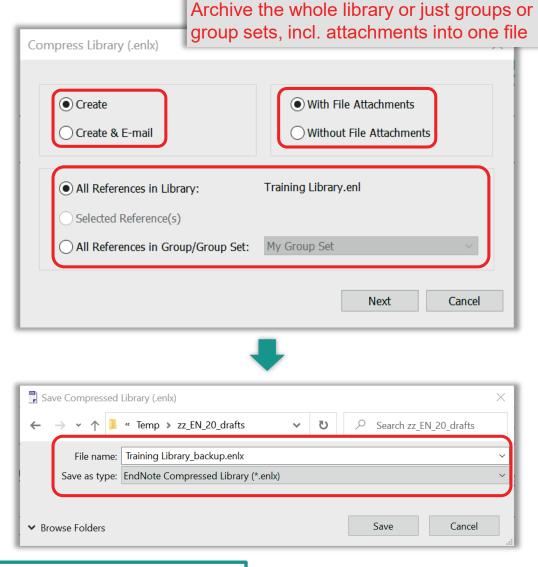
# **Organising your Library – Searching Your Library**





# **Organising your Library – Backup**





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





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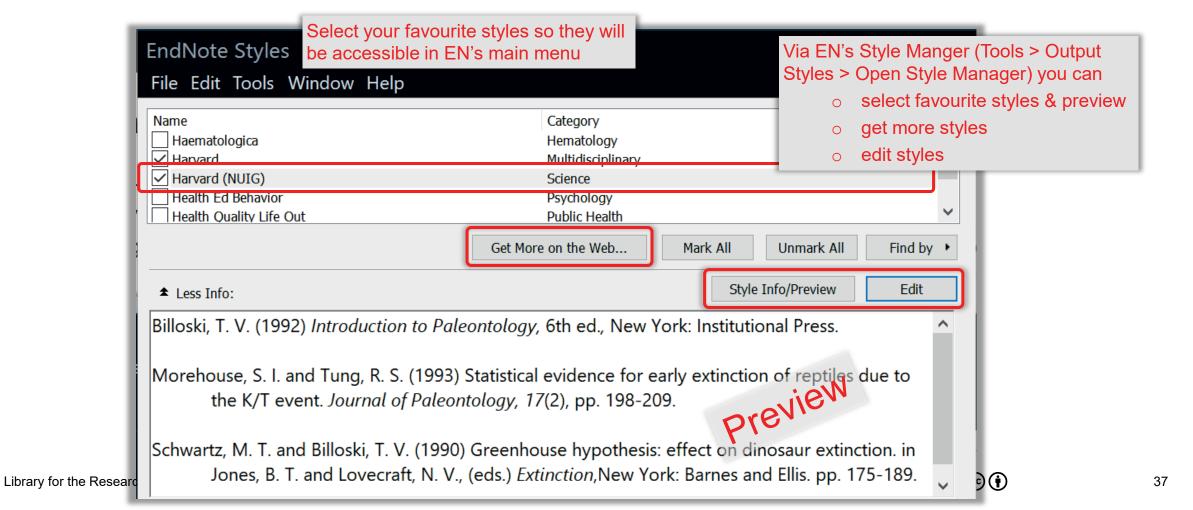
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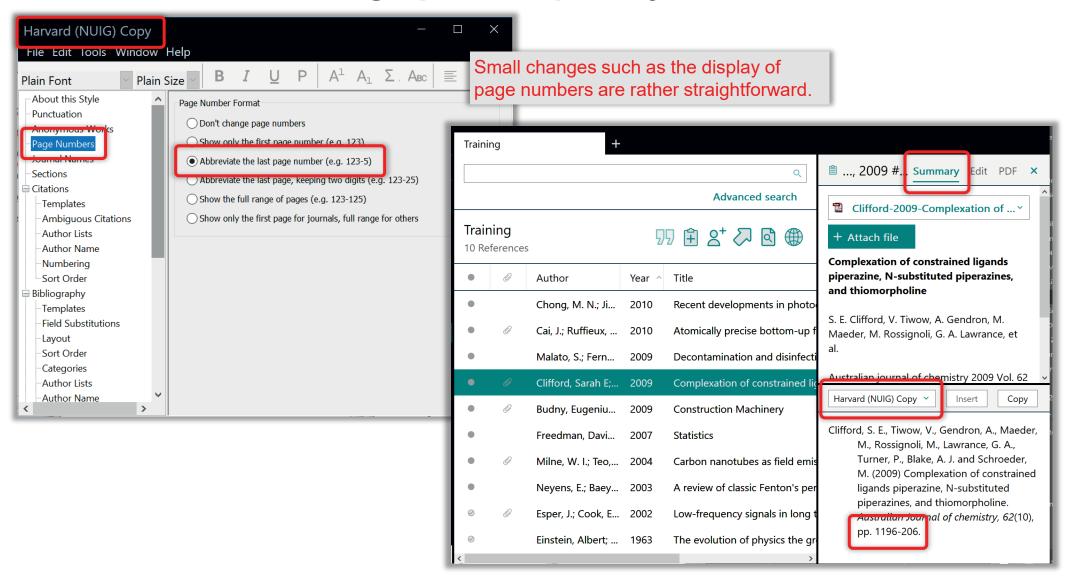
- Output styles determine how references will be formatted and displayed in your bibliography or in your text document
- EN's <Style Manager> provides >6000 styles (incl. demands for most journals)





- 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)
       support.clarivate.com/Endnote/s/article/EndNote-X8-Windows-and-Mac-Style-Editing-Guide

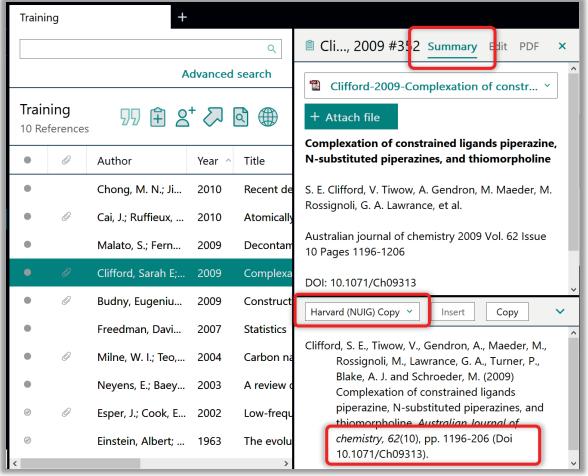






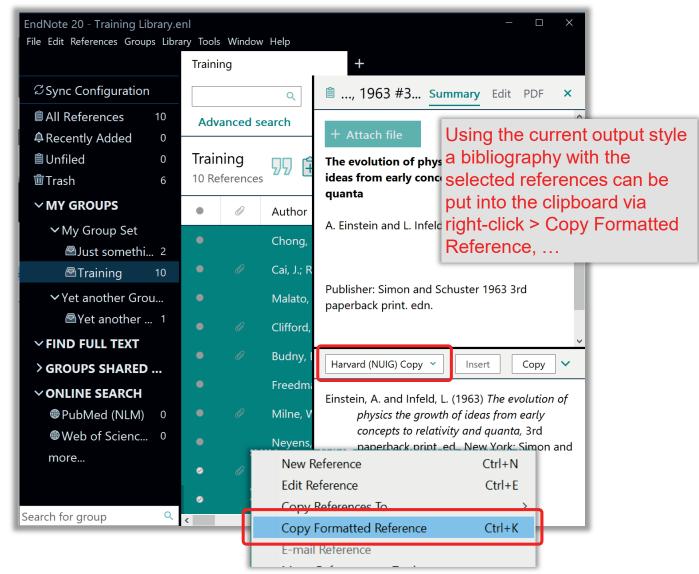
Harvard (NUIG) Copy File Edit Tools Window Help  $\underline{\mathsf{U}} \mid \mathsf{P} \mid \mathsf{A}^{\mathtt{l}} \mid \mathsf{A}_{\mathtt{l}} \mid \mathsf{\Sigma} \mid \mathsf{A}_{\mathtt{BC}} \mid \mathsf{\Xi} \mid \mathsf{\Xi}$ ✓ Plain Size ✓ Plain Font Bibliography About this Style Punctuation Reference Types > Insert Field Anonymous Works Page Numbers Electronic Book Author · (Year) · Title, · Publisher · [online], · Journal Names available: ·URL·[`accessed`·Date·Accessed]. Sections Citations Created · By · (Year) · Title, · Description, · Number |, Templates °At:°Place.Published|.°`Register **Ambiguous Citations** number`°Number|. Author Lists Author Name Title · (Year · Released) · `Directed · by ` °Director | . Film or Broadcast Numbering °Country|:°Distributor|.°Date Sort Order Released | Running · Time | Page | Redium | Time | Redium **Bibliography Femplates** Journal Article Author · (Year) · Title . · Journal . · Volume | (Issue) | . °pp.°Pages|°(`Doi`°DOI)|. Layout Sort Order Magazine Article Author · (Year) · Title . · Magazine , · Date | , ° p . ^ pp . Categories °Pages | . **Author Lists Author Name** Cartographer · (Year) · Title, · Scale | . °Place **Editor Lists** Published |: "Publisher |. **Editor Name** 

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



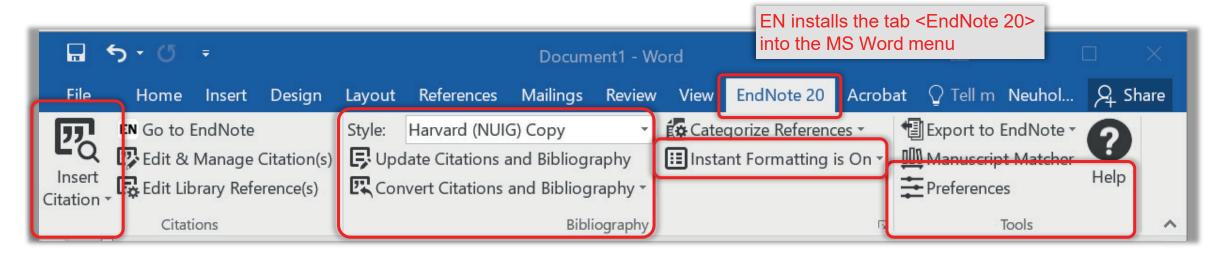
...and can then be pasted with its formatting into a text document.

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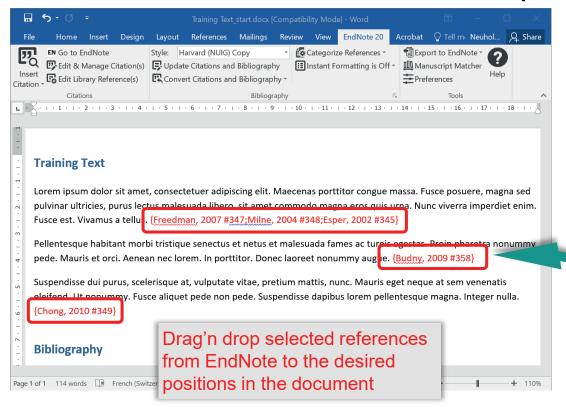


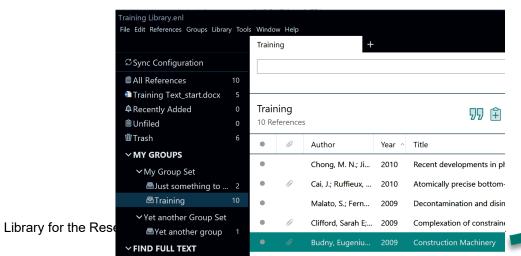
# Cite-While-You-Write (MS Word Plugin)

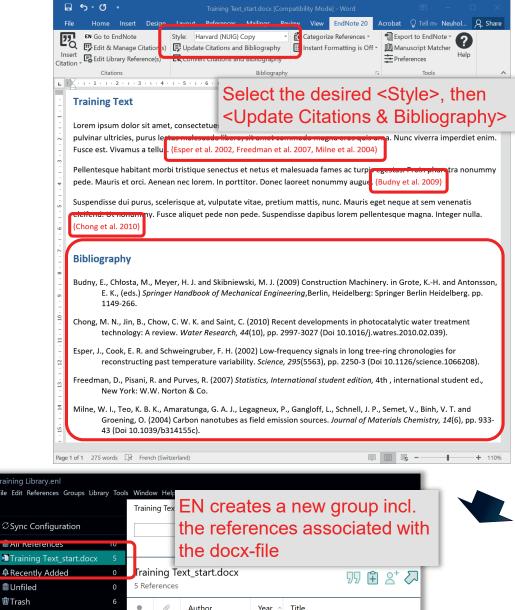


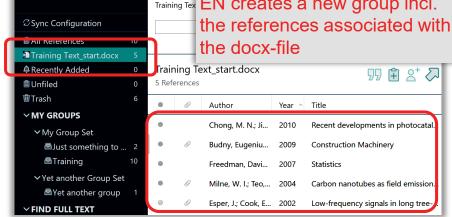
- EN's Word plugin acts as an interface between EN and MS Word
- Either use <Insert Citation> from within the Word document or drag'n drop selected citation(s) from EN to the desired position in the document
- By default, EN activates <Instant Formatting>, i.e. citations and bibliography are automatically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

# MLib4RI Cite-While-You-Write (MS Word)



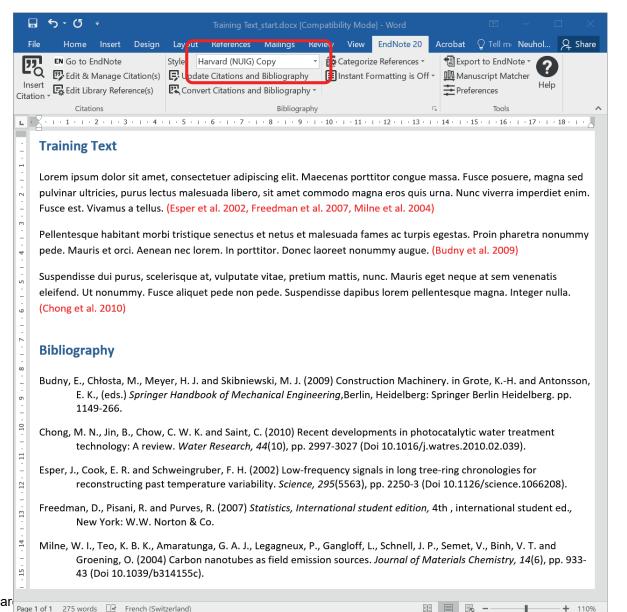






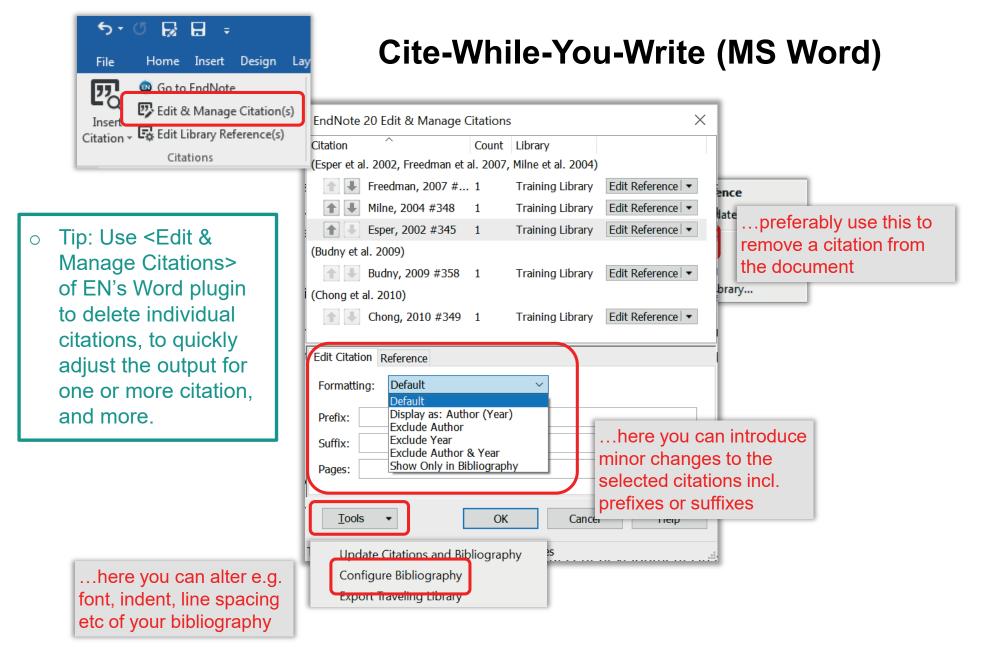


# Cite-While-You-Write (MS Word)



- 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

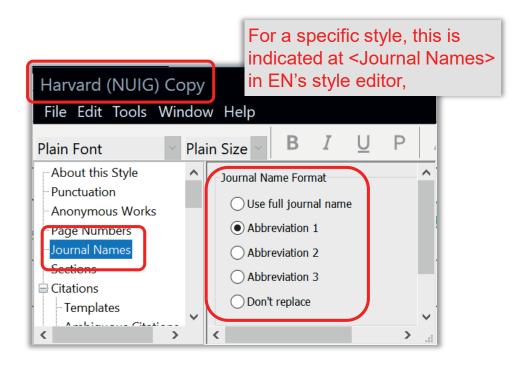






# **Cite – Using Journal Abbreviations**

 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>

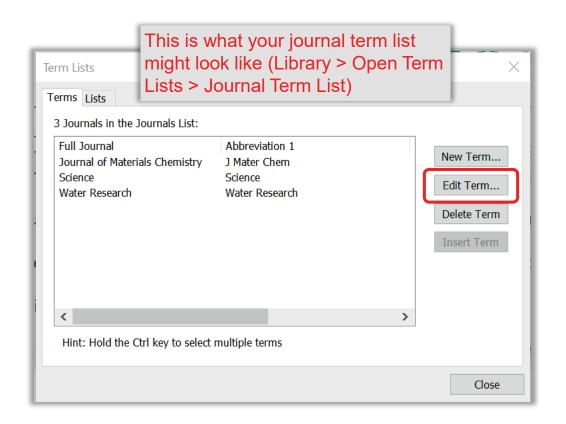
#### EndNote

- 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

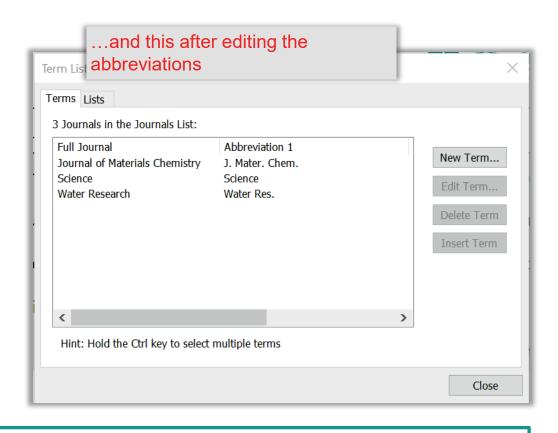




# **Cite – Using Journal Abbreviations (Method a)**

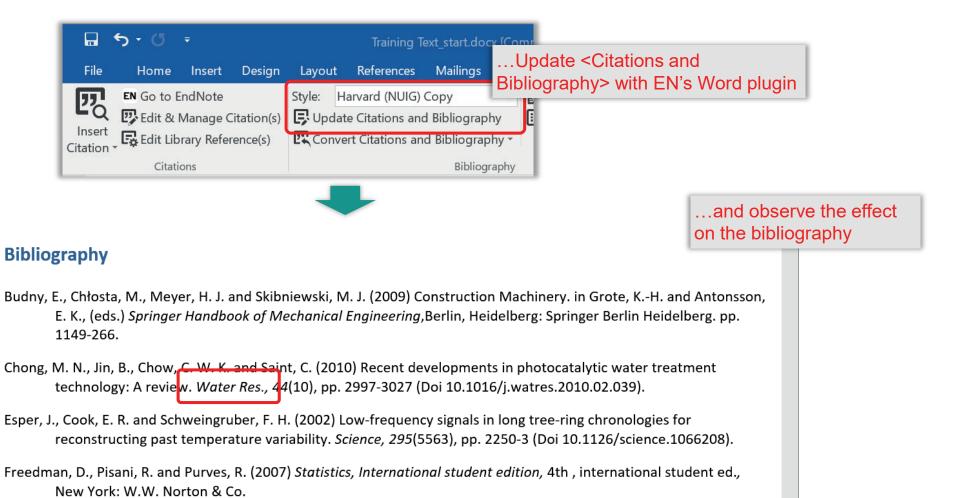






- Tip: If you are having troubles finding 'correct' abbreviations see <a href="https://www.lib4ri.ch/journal-directories-useful-websites#Journal-Title-Abbreviations">https://www.lib4ri.ch/journal-directories-useful-websites#Journal-Title-Abbreviations</a>
- o Tip: Save your journal term list (\*.txt) for future use, expansion or simply as a backup

# **Cite – Using Journal Abbreviations**



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

Groening, O. (2004) Carbon nanotubes as field emission sources. J. Mater. Chem., 14(6), pp. 933-43 (Doi

Library for the Research

+ 110%

10.1039/b314155c).



## 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)
- o 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

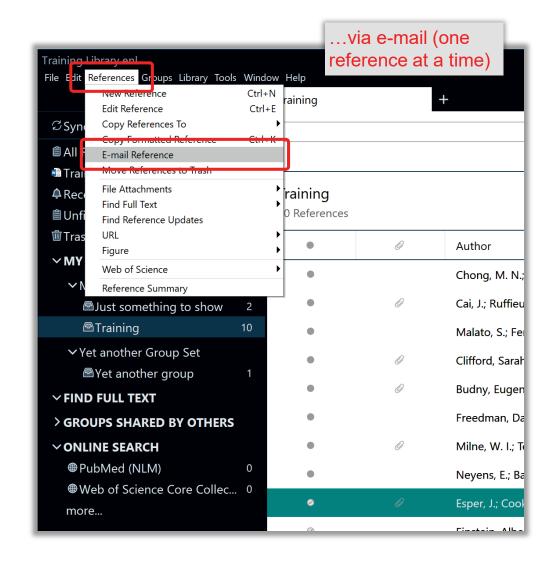
### Concluding Info, Help & Useful Links

- EndNote can do more (58)
- o Is EndNote the right thing for me (59)
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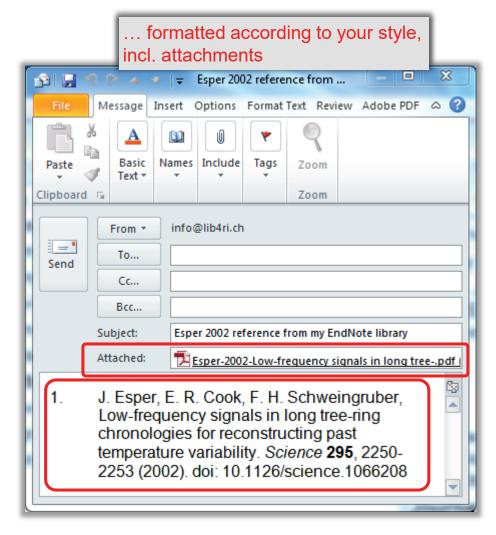




# **Sharing without an EN Online Account**

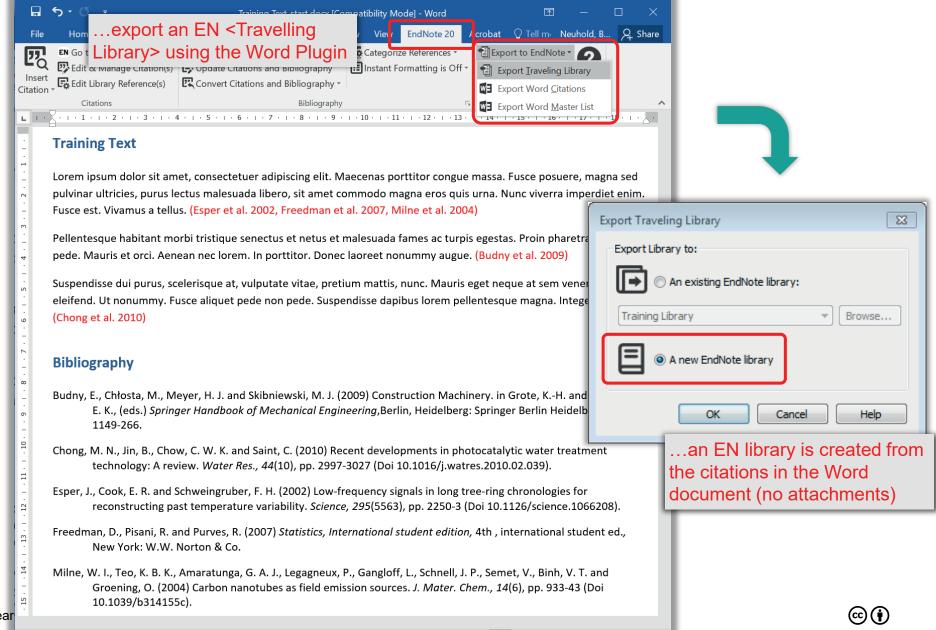








# **Sharing without an EN Online Account**



51



## **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

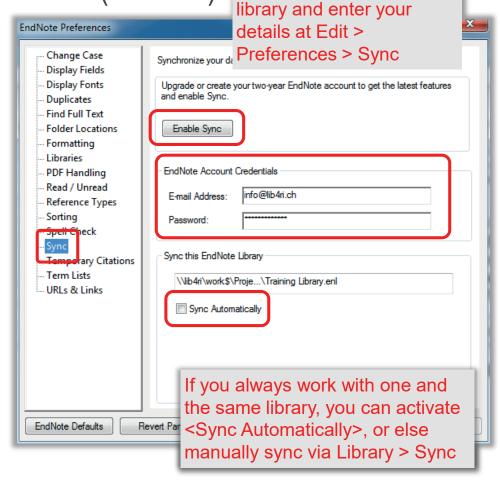
 Your library will eventually become corrupted. This is NOT recommended by EndNote at all!

## 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)



Open your EN 20/21

- 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)

Library for the Resea

**Endnote** 



Clarivate

My References

**EndNote** 

Organize

Format

Match

Options

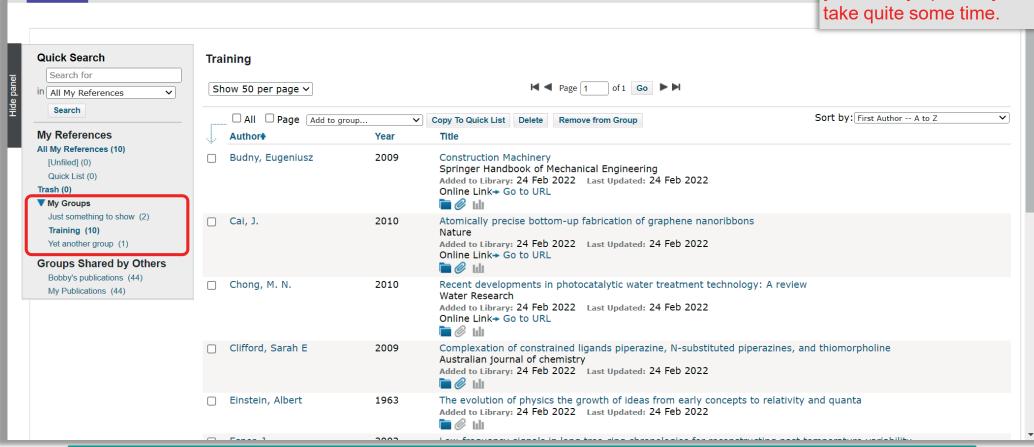
Downloads

Collect

# 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.

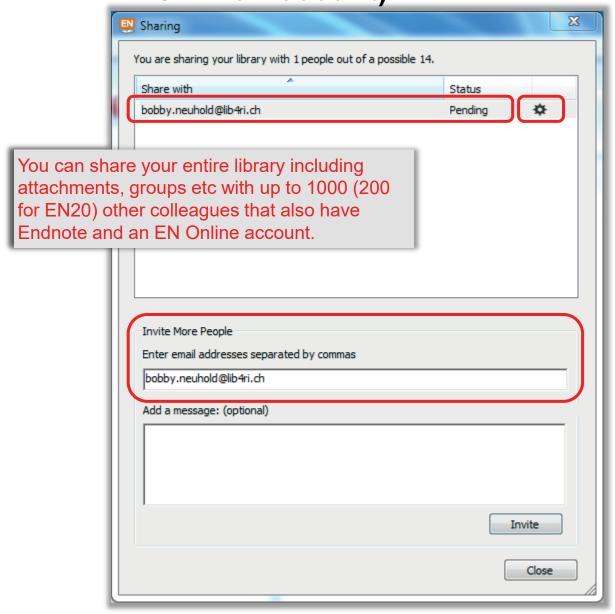
Endnote



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)



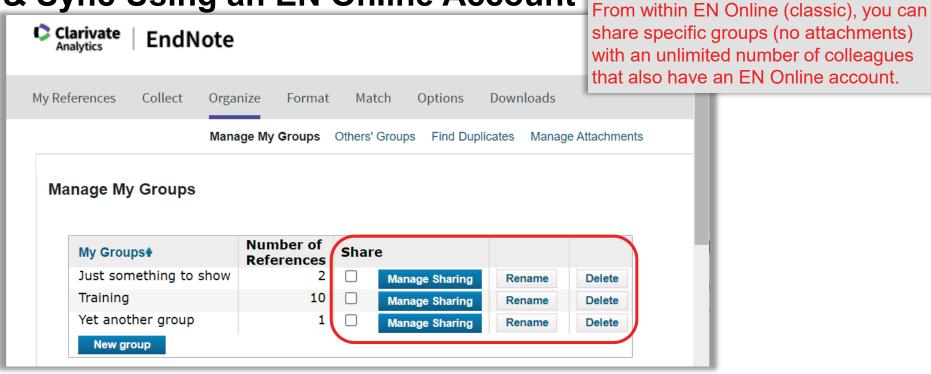
# Share & Sync from within Endnote (via your linked EN Online Account)



- 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** 



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



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## EndNote can do more...

- Categorise bibliographies (e.g. for CVs)
- Cite within Powerpoint (plugin)
- o Footnotes
- Built-in Word manuscript templates (for various journals)
- Handle figures and tables (for referencing in Word)
- o Repair broken libraries
- 0 ...

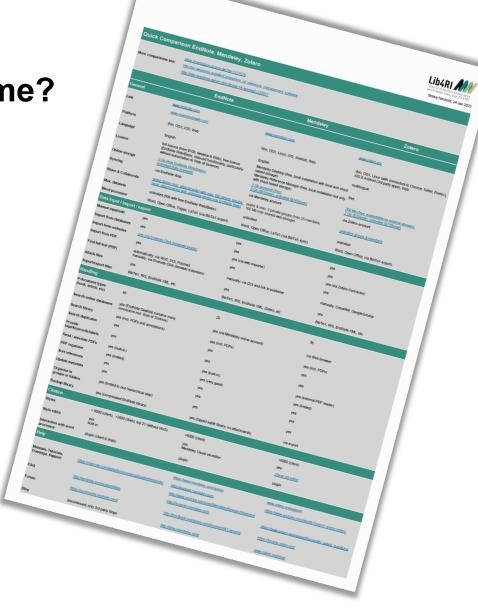
Be explorative

...but never without a backup



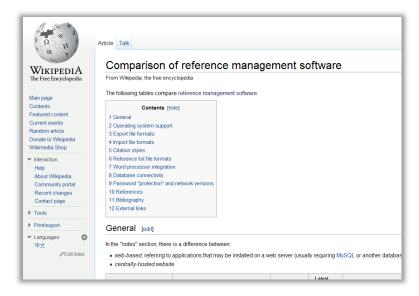
Is EndNote the right thing for me?

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





Is EndNote the right thing for me?





- Wikipedia > Comparison of reference management software
- o mediaTUM Munich (https://mediatum.ub.tum.de/1127579)
- SLUB Dresden (<a href="https://nbn-resolving.org/urn:nbn:de:bsz:14-qucosa2-769412">https://nbn-resolving.org/urn:nbn:de:bsz:14-qucosa2-769412</a>)



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



**Endnote** 

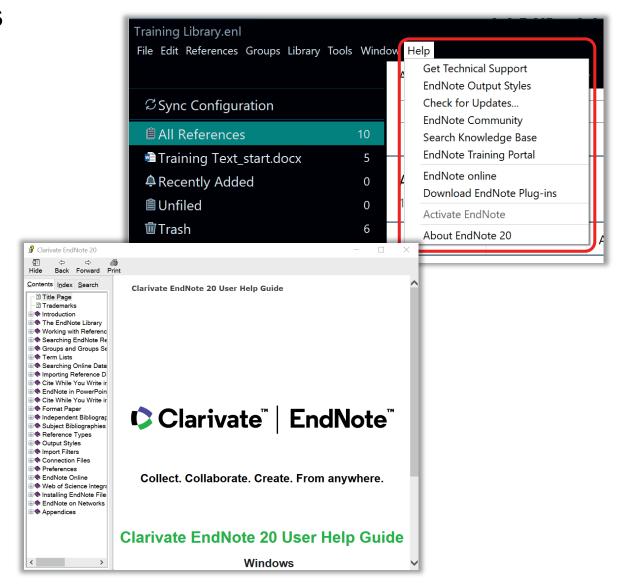
re Comparison - 8th Update (June 2020)



# 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 <u>www.endnote.com</u>





## Lib4RI EndNote Quick Guide

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







## **Useful Links**

- Downloads
  - o <a href="https://endnote.com/downloads">https://endnote.com/downloads</a>
- User Guides, Help, Tutorials, Training Videos & Classes
  - <u>https://endnote.com</u> > Support

- Support / Knowledge Base,
   Community, FAQ
  - <u>https://endnote.com</u> > Support
    - Do's and Don'ts & more
  - o <u>https://endnote.com</u> > FAQ



# Thank you!

## Stephanie Hofmann, Bobby Neuhold

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

Überlandstrasse 133 • 8600 Dübendorf Forschungsstrasse 111 • 5232 Villigen Zürcherstrasse 111 • 8903 Birmensdorf

T +41 58 765 57 00

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