

Info #06 English

EndNote



The exponential growth of scientific publications and increasing sensibility towards plagiarism make the organisation of references and their correct citation within documents more important than ever. Reference management software helps authors cope with these tasks and often includes a variety of other useful functions. EndNote is the market leader for reference management software. Its strengths comprise the built-in online reference search, including *Web of Science*, its simple adoption and organisation of literature data, and features enabling the automatic search for full texts (PDFs), in-text citing of references as well as the generation of bibliographies – particularly with MS Word.

Contact & Help Desk

In Person	At the information desks in Birmensdorf, Dübendorf and Villigen
Phone	+41 58 765 5700
E-mail	info@lib4ri.ch
Web	www.lib4ri.ch

Good to Know

Acquisition & Installation	A copy of EndNote can be obtained via the IT-support at your institute / department; costs are generally borne by the institute or the department.
Compatibility EndNote (Version X9)	PC: at least MS Windows 7 and MS Word 2007 or Apache OpenOffice 3.x. Mac: at least OS X 10.10 (Yosemite) and MS Word 2011 or Apple Pages. EndNote X7, X8 and X9 are cross-platform compatible.
Manuals, Brochures, Training Material, Support	Various documents and video tutorials can be found in the training and support section at www.endnote.com and via EndNote's help menu.

Training Offers at the Library Lib4RI

Every spring and autumn, Lib4RI offers EndNote training sessions as part of the introductory library courses for PhD students and others affiliated with the four research institutes. You can find more information at www.lib4ri.ch > Services > Trainings.

Alternatives to EndNote

Good support of the operating and word processing system as well as user-friendly operation are important criteria in choosing reference management software. «Mendeley», for example, has its strengths in sharing, Mac users are fond of «Papers», «Zotero» is intuitive and fast due to its «Connectors» to «Firefox», «Chrome» and «Safari», and «JabRef» is typically used by LaTeX enthusiasts. Comparisons can be found at Wikipedia using the keyword «Reference Management» or in TU Munich's «Digital Collection Management» (<https://mediatum.ub.tum.de/1320978>).

EndNote Quick Guide – Import, Organise & Cite References

Creating an EndNote Library

Upon EndNote's first start you are asked to create a new library. This library can be successively filled with literature references and full texts. Via the EndNote menu «File > Open», previous libraries can be accessed.

► Tip: EndNote generates a file with the ending «ENL» and a corresponding folder with the ending «DATA», where your full texts (PDFs) will be stored.

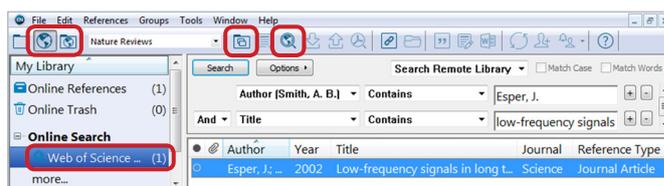
Searching References Online with EndNote

References can be inserted into your library by using EndNote's online search option. In addition to *Web of Science*, you can access

many other online databases via the toolbar icon .

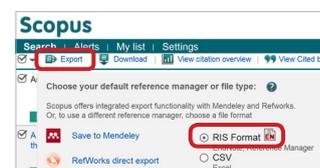
► Tip: In plain online mode , only selected references can be imported with , while in integrated mode  (default setting) all references found are automatically transferred into your library.

► Tip: Via the EndNote menu «Edit > Connection Files > Open Connection Manager», you can find a list of selectable databases, including a weblink for the installation of additional connections such as the *NEBIS-catalogue*.



Exporting References from Online-Databases

EndNote's built-in online search options are limited and some databases such as *Scopus* are not included in the «Connection Manager». Most database portals do, however, allow you to export metadata for references found into an EndNote readable «RIS» file.



- ▶ Tip: If EndNote does not automatically open the «RIS» file, import it via  and choose «Reference Manager (RIS)» as the import option.
- ▶ Tip: If the database portal supports an export format other than «RIS», activate a suitable filter via the EndNote menu «Edit > Import Filters > Open Filter Manager» or install it from the weblink given therein.

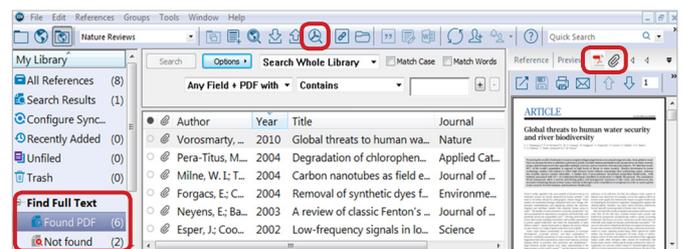
Getting References from Full-Text PDFs

Metadata can often automatically be extracted from a given PDF with  and jointly stored in the EndNote library. For this, your PDF has to contain as a text block the «Digital Object Identifier» (DOI), eg doi: 10.1038/nature09440. It is advisable to double-check the metadata generated for import errors.

- ▶ Tip: Via «File > Import > Folder», a complete folder with multiple PDFs can be read in.

Searching Full-Text PDFs with EndNote

With , you can have EndNote search for full texts (PDFs) for one or more selected references. Under «Find Full Text» all full texts found can be seen.



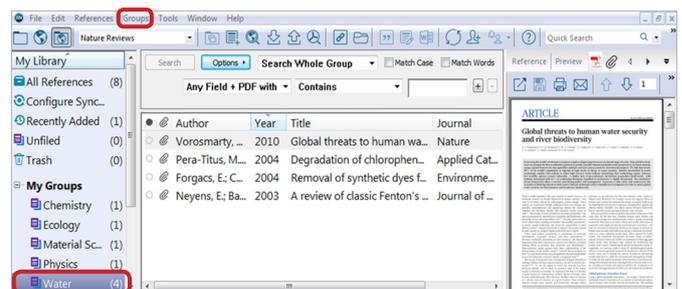
The integrated PDF-viewer allows you to mark text blocks and to add searchable annotations.

- ▶ Tip: Make sure all search options are activated within EndNote's default settings at «Edit > Preferences > Find Full Text» and enter http://sfx.ethz.ch/sfx_lib4ri/ as the «OpenURL Path» pointing to our *Lib4RI link resolver*.
- ▶ Tip: Should EndNote's built-in full-text search be unsuccessful, *Lib4RI's link resolver* will help you to find and download the PDF for a selected reference. This option is given under «References > URL > OpenURL Link». A PDF can be added manually to the current reference via «References > File Attachments > Attach File».
- ▶ Tip: In order to access licensed full texts and databases at all, your computer needs to be connected to the IP network of one of the four research institutes.

Grouping References

The EndNote menu «Groups» allows you to create new groups or categories of groups («Group Sets»).

- ▶ Tip: Via «Drag & Drop», you can easily assign



selected references from the library «All References» or the container «Unfiled» to other groups. «Unfiled» contains all references that have not yet been assigned to any group. This does not generate any duplicates.

Citing References & Creating a Bibliography

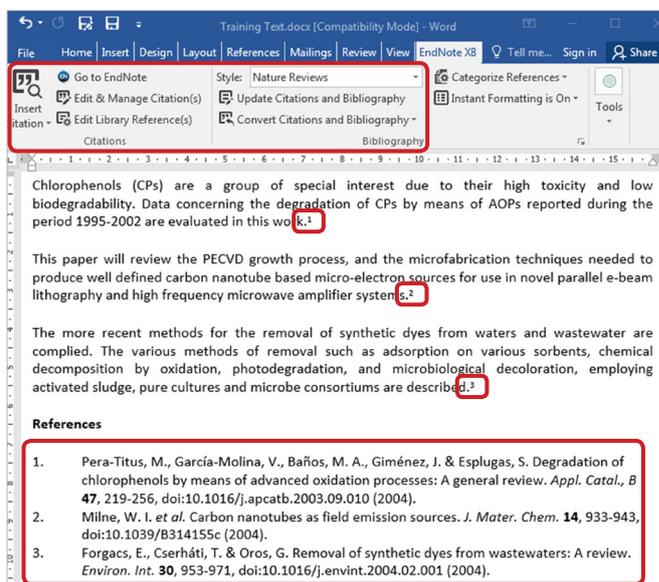
Upon installation of End-Note a new tab «EndNote X9» is added to the MS Word menu. Therein you find the «Cite While You Write» (CWYW) functions.

At a given text position, a citation can be inserted via the toolbar icon «Insert Citation» and the opening selection menu. In accordance with the output style chosen in the drop-down menu «Style», the citation is added

to the text, including the corresponding entry in the bibliography. You can keep track of all citations in the text via «Edit & Manage Citation(s)». There you also have the option to remove individual citations or to make minor changes to their appearance.

► Tip: Should documents become rather large, it is often favourable to switch to the unformatted citation mode via «Convert Citations and Bibliography». If needed, the formatted mode can always be reactivated via «Update Citations and Bibliography».

► Tip: If an appropriate output style is not given by the drop-down menu «Style», you might need to activate it within EndNote via «Edit > Output Styles > Open Style Manager», or install it from a given weblink. For advanced users there is also a style editor available.



Creating Library Backups

EndNote offers with «File > Compressed Library (.enlx)» a backup function allowing you to create a copy of the complete library including all full texts (PDFs).

Using your Library Online

If you synchronise your library via «File > Preferences > Sync» with a free «EndNote Web» Account (www.myendnoteweb.com), it will be accessible from up to 3 computers running «EndNote X9», via the web client or a tablet (iOS App).

Sharing your Library with Colleagues

Option 1: store EndNote's library («ENL»-file and «DATA»-folder) on a file server. Only one person at a time can access this library. **Option 2:** synchronise the library with «EndNote Web» and share a) individual «Groups» (no PDFs) using the web client, or b) the whole library (incl. PDFs) with up to 100 collaborators via «File > Share».

► Tip: Do not synchronise and share your library via other cloud services (eg Dropbox). This might damage your library.