
EndNote Training Session

PHD-DAY 10/12/2014

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1. Workshop Agenda

I PART – Basics	Workshop schedule Why use reference managers? EndNote Basics	20 min
II PART – EndNote Features	Training in 2 different teams A & B (4 pers./group)	30 min
III PART – Group Shuffle	Presentation of results from teamwork in front of all participants.	30 min
III PART – Closure	Questions & feedback	Up to 20 min

Prep

- Copy workshop material
- Walkthrough for support
- Open EndNote programme
- Open the following links in your browser (Firefox):
 - <http://endnote.com/>
 - <http://bib.telegrafenberg.de/quick-links/web-of-science/>
 - <http://bib.telegrafenberg.de/en/services/author-services/reference-management/endnote/>

2. EndNote Basics // 30 min.

(1) Starting EndNote and opening a sample library (library=database)

- From the Help menu (in EndNote), select the Show Getting Started Dialog command.
- Select the Open an Existing library option.
- Navigate to the Examples folder in the EndNote X7 folder in the Program Files directory.
- Select and open the file called Sample_Library_X7.enl

(2) Navigating the library window – the Library window includes four work areas:

- Toolbar
- Reference list panel
- Tabs panel
- Search panel
- Groups panel

(3) Library window layout – depending on the layout that you select from the layout menu located in the lower right-hand corner.

(4) Opening and closing a reference

(5) Groups

- Custom groups
- Smart groups
- Combined groups
- All References
- Unfiled & Trash

- Online Search

(6) Display modes

- Local Library Mode
- Online Mode
- Integrated Library Mode

EXERCISES A

3. Group A // 30 min

Try to solve the following exercises within your team. You can use the walkthrough if you are stuck. If you are finished earlier, you can use the exercises in the appendix or work on the other group tasks. You have 25 minutes for this task. After that, shuffle the groups and share what you have learned with your new team.

(1) Create a new library

- File > New
- Choose folder
- Enter a name and save the library

(2) Export references from the Web of Science database and import them into EndNote

- Open the Web of Science in your browser (<http://bib.telegrafenberg.de/quick-links/web-of-science/>)
- Search for “Climate Engineering” and “2014”
- Select 10 references (first page)
- Click on “Send to: EndNote” and export the Full Record Content
- Go to EndNote and check if the import was successful.

(3) Create custom group

File your references in a new group.

- Create a new Group and name it.
- Move your imported search results into your new group (drag&drop)
- View your results in the Tabs panel, and switch between the tabs “Reference View” and “Preview”.

- Select another Output Style (dropdown in toolbar) and see the changes in the preview tab
- To save the reference, click “File” then “Save” or STRG+S.

(4) Find full text for references

If you want to find full texts for your references, you can use the “Find Full Text” operation in the EndNote programme. But at first you have to change the preferences in EndNote.

- Follow the instructions in the library tutorial: [How to find and retrieve full text.](#)
- Select the reference(s) to which you want to add full text and run the “Find Full text” option.
- If the automated pdf import was successful, check the attached pdfs in the integrated pdf viewer and try to add notes or highlight interesting text passages

(5) Attach pdfs and figures

- Attach a pdf to a reference manually: select the attachment field in the Reference pane and use right-click.
- Attach a figure to a reference: select the figure field in the Reference pane and use right-click.
- Type Caption text into the Caption field.

(6) Save a compressed copy of your library

- File > Compressed Library (.enlx)
- Set your preferences
- Restore the compressed library file

BEXCERCISES B

4. Group B // 30 min

Try to solve the following exercises within your team. You can use the walkthrough if you are stuck. If you are finished earlier, you can use the exercises in the appendix or work on the other group tasks. You have 25 minutes for this task. After that, shuffle the groups and share what you have learned with your new team.

(1) Create a new library

- File > New
- Choose folder
- Enter a name and save the library

(2) Import pdf files to create new references in your EndNote library

- Set pdf preferences (Edit>Preferences>PDF Handling) to “PDF Auto Renaming Option”: Author+Year+Title
- Import a folder of pdf journal articles from your computer or the workshop set (File>Import>Folder). Create a “Group Set” for the import

(3) Create custom group

File your references in a new group.

- Create a new Group and name it.
- Move your imported search results into your new group (drag&drop)
- View your results in the Tabs panel, and switch between the tabs “Reference View” and “Preview”.
- Select another Output Style (dropdown in toolbar) and see the changes in the preview tab

- To save the reference, click “File” then “Save” or STRG+S.

(4) Use the Cite While You Write Plugin with MS Word to insert in-text citations

- Open the sample word file
- Place the cursor in the text and insert a citation from the EndNote library to the first paragraph in your word file. Use the “Insert Citation” option in the EndNote tab.
- Highlight 2 references in the EndNote programme and insert the Selected Citation to a paragraph.
- Remove one or two citations with the Edit & Manage Citations option.

(5) Cite references in a footnote

- Create a footnote in the word file.
- Insert a citation into the footnote area (like in the exercise before).
- Change the Output Style in the dropdown or in the bibliography section to “Chicago 16th footnote”.

(6) Save a compressed copy of your library

- File > Compressed Library (.enlx)
- Set your preferences
- Restore the compressed library file

APPENDIX

5. Additional Exercises

(1) Online Search in the Web of Science from within Endnote

Search for the following citation in the Web of Science:

“De la Torre, A., Alexander, P., Hierro, R., Llamedo, P., Rolla, A., Schmidt, T., Wickert, J. (2012): Large amplitude gravity waves above the Southern Andes, the Drake Passage and the Antarctic Peninsula. – Journal of Geophysical Research, 117, D2, 15 PP. DOI: 10.1029/2011JD016377”

- Use the Online Search from within EndNote
- Search in Online Search Mode
- Copy the citation into your local library

(2) Import references from Google Scholar into EndNote

- Go to Google Scholar: <http://scholar.google.com/>
- Configure the settings in Google Scholar first to see the citation import links in the results list.
- Use the following search terms: “Climate Engineering” from 2013.
- Export your search results into your EndNote library.
- Send single references to EndNote by clicking on the "Import into EndNote" link.

(3) Attach a figure in EndNote library and cite the figure in the word manuscript.

- Attach one figure to a reference manually (workshop set)
- Got to EndNote
- Highlight a reference
- Select the figure field in the reference pane and use right-click.
- Use the figure option, and attach a figure from the workshop set
- Type a Caption text into the Caption field

(4) Duplicate control

- Perform the same search in Scopus/WoS/Google Scholar again and import the same references again
- Go to the group “All references”, mark all items
- Use the “Find Duplicates” option in the reference menu.
- In the next dialog you can compare duplicates and decide which version to keep and which to delete.
- Delete all your duplicate items in your library.

(5) Sort & search – manage the new references in your library

- Check document types and edit fields in the reference pane as needed.
- Sort and order your references by author, year, and reference type.
- Search EndNote library with quick search.
- Search EndNote library within the Search panel.
- Create a “Smart group” in your library.
- Create a “Combination group”.

(6) Add notes, abstract and keywords to some references.

(7) Create a “Subject bibliography”

(8) Modify an Output Style

(9) Add an Output Style to EndNote

(10) Online Search

(11) Change the columns in the Reference pane

(12) Name and display “Custom fields”

(13) Working with “EndNote Web” or the free application “EndNote Basic” (Account or registration required)

6. Notes and Questions for Q&A // 20 min
