

# Reference Management

## Hands-on training: EndNote

### Prep

- ✓ Workshop material: [ftp.gfz-potsdam.de/pub/incoming/bib/LIV/WorkshopSet.zip](ftp://gfz-potsdam.de/pub/incoming/bib/LIV/WorkshopSet.zip)
- ✓ Open EndNote
- ✓ Open the following links in your browser (Firefox):
  - <http://bib.telegrafenberg.de/>
  - <http://bib.telegrafenberg.de/quick-links/web-of-science/>
  - <http://bib.telegrafenberg.de/en/services/author-services/reference-management/endnote/>

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## **EndNote Basics // 15 min.**

### **Starting EndNote and opening a sample library (library=database)**

- Select the Open library option.
- Navigate to the Examples folder in the EndNote X7 folder in the Program Files directory. (H>Programm files>EndNote>Examples)
- Select and open the file called Sample\_Library\_X7.enlx

### **Navigating the library window – the library window includes four work areas:**

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

### **Library window layout**

Depending on the layout that you select from the layout menu located in the lower right-hand corner.

### **Opening and closing a reference**

#### **Groups**

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

#### **Online Search/ Display modes**

- Local Library Mode
- Online Mode
- Integrated Library Mode

#### **Endnote Sharing**

- EndNote Sync
- EndNote Web

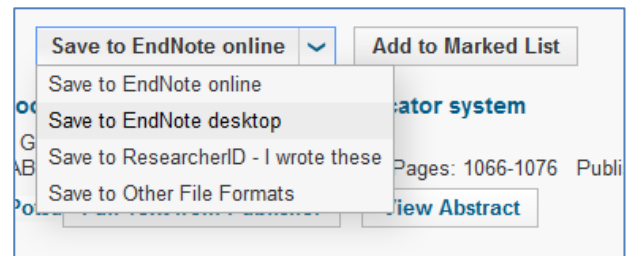
## DEMO

### 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

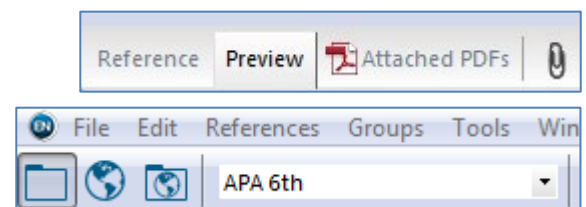
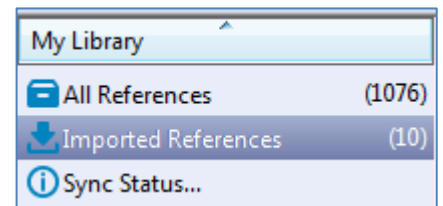
- Open the Web of Science in your browser (<http://bib.telegrafenberg.de/quick-links/web-of-science/>)
- Search for topic “Climate Engineering” and timespan “2016-2017”
- Select 10 references (first page)
- Click on “Save to: EndNote Desktop” and export the Full Record Content
- Open file with EndNote
- Go to EndNote and check if the import was successful: → New group “Imported References” in groups panel



### 3. Create a group set and a custom group

You have two options for creating a custom group. You can select references and then add them to a new group or you can create an empty group and then add references to it.

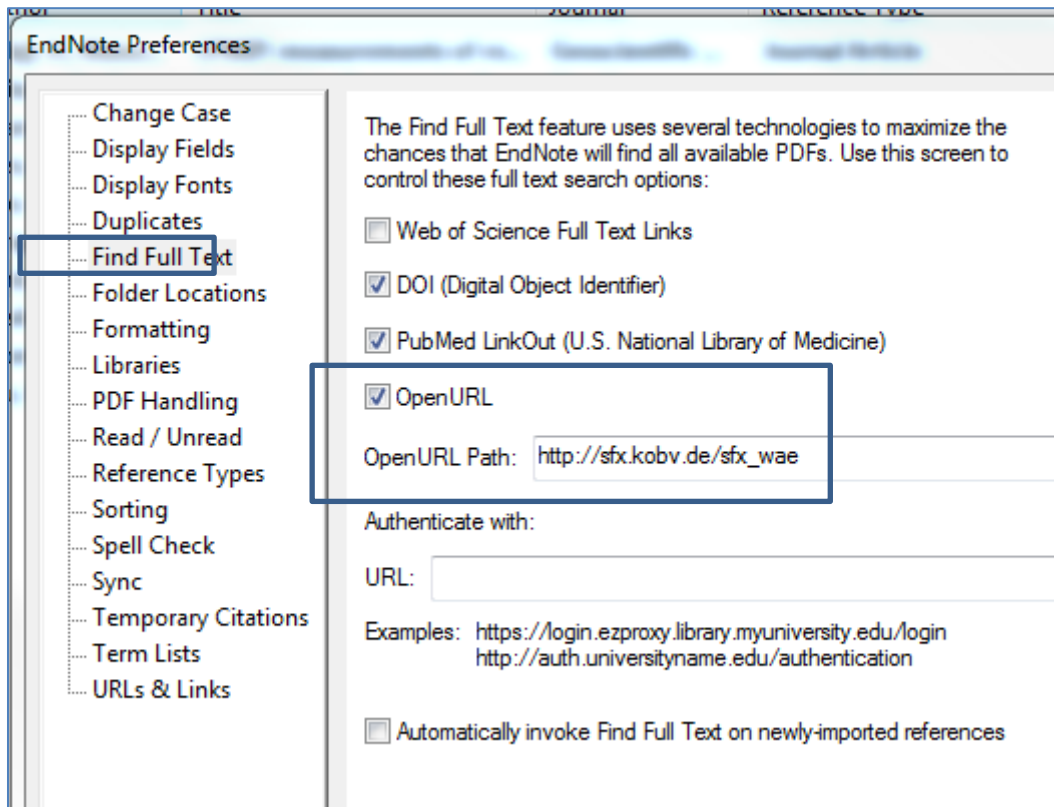
- Create a new Group Set and name it: Menu > Groups > Create Group Set
- Create a new Custom Group and name it: Menu > Groups > Create Group
- Move your imported references into your new group: e.g. drag & drop
- View your results in the Tabs panel, and switch between the tabs “Reference View” and “Preview”
- Select another Output Style (drop-down list in toolbar) and see the changes in the preview tab



#### 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.

- Go to Edit > Preferences > Find Full Text
- Type/Copy the following URL in the field OpenURL Path:

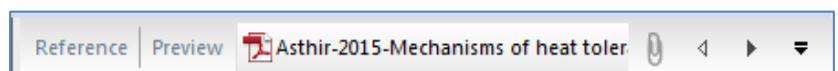


[http://sfx.kobv.de/sfx\\_wae](http://sfx.kobv.de/sfx_wae) , click OK

- Highlight all references and run the “Find Full Text” option: right mouse click > Find Full Text > Find Full Text

If we have access to the full text, EndNote will download the pdf and automatically attach it to the reference. This might take some time.

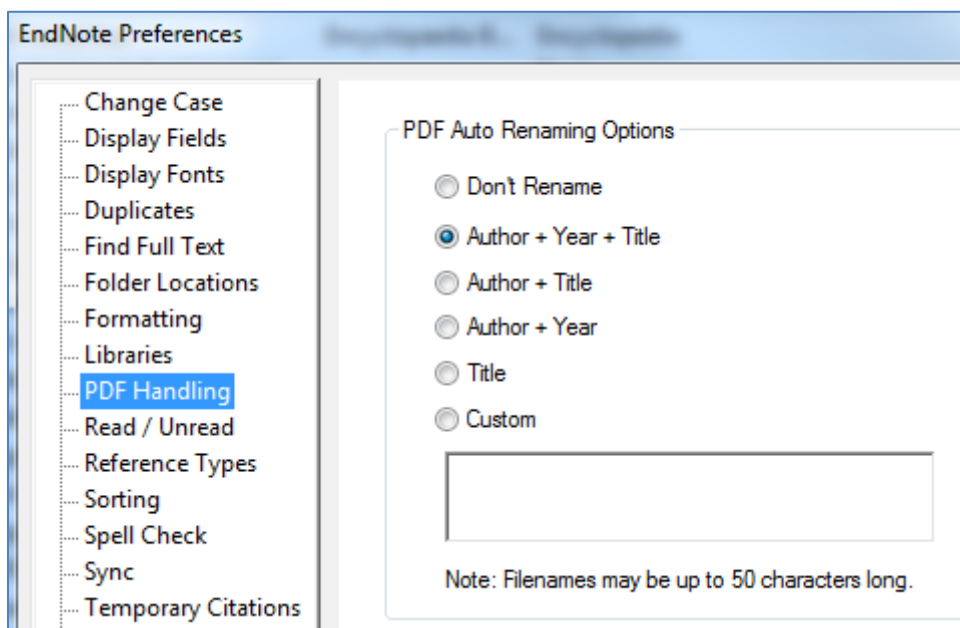
- View a pdf in the tab pane and add a note or highlight some text
- To save the reference: click File > Save or STRG+S.



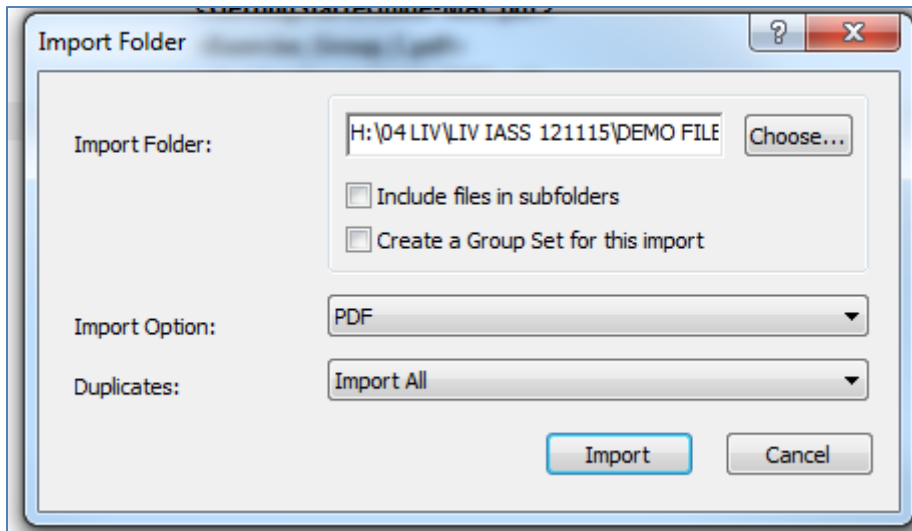
## 5. Importing pdf files to create new references in your EndNote library

This feature allows you to convert existing collections of PDF files into EndNote references by extracting Digital Object identifiers (DOI) from PDF files. The system matches DOI information with data available from CrossRef by capturing bibliographic content and creating new EndNote references.

- Set PDF preferences: Edit > Preferences > PDF Handling) to “PDF Auto Renaming Option”: Author+Year+Title
- Click OK



- From the File menu, select Import > Folder to open the Import Folder dialog.
- Select the PDF folder from the Workshop Set/Sample Project Files/PDFs, or one on your computer and then click OK.
- If the selected folder lists subfolders, click the "Include files in subfolders" check box to include PDF files in those sub-folders
- You can also let EndNote create a Group Set for the import
- Select PDF from the Import Option list.
- Select an option from the Duplicates list
- Click the Import button to import the PDF files from the selected folder to your library.

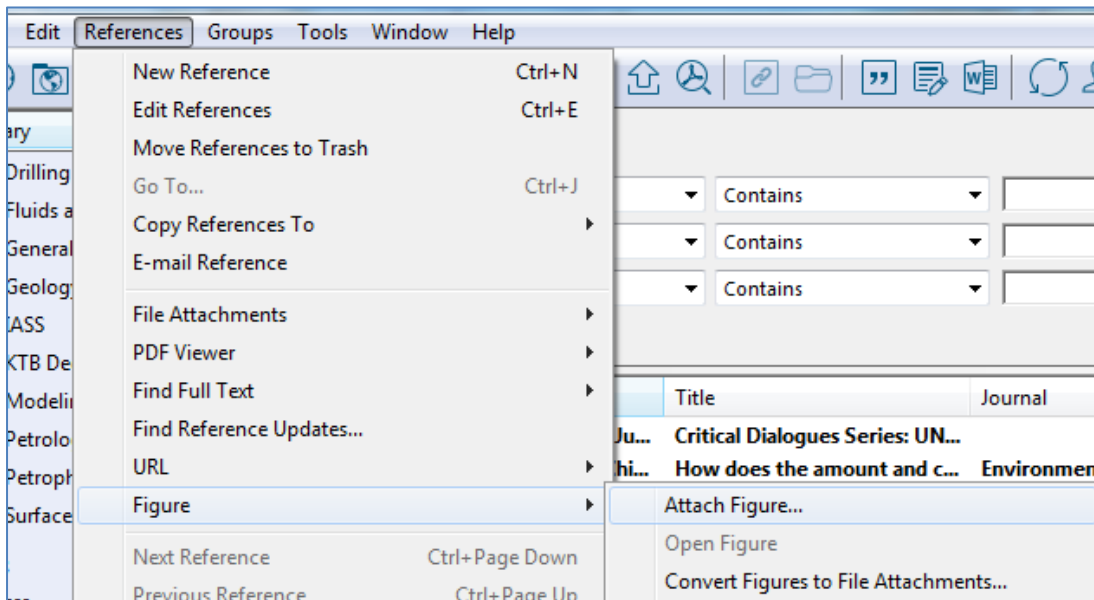


## 6. Attachments

Use the File Attachments field to store the path to PDF files, tables or images on your hard drive.

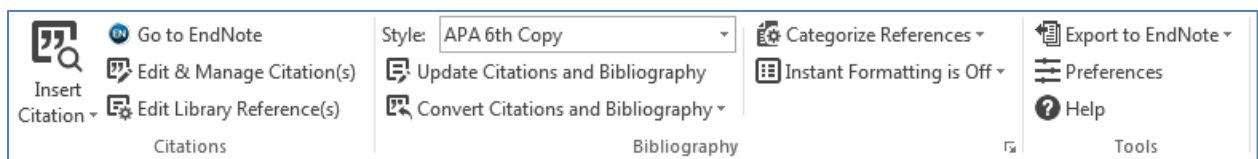
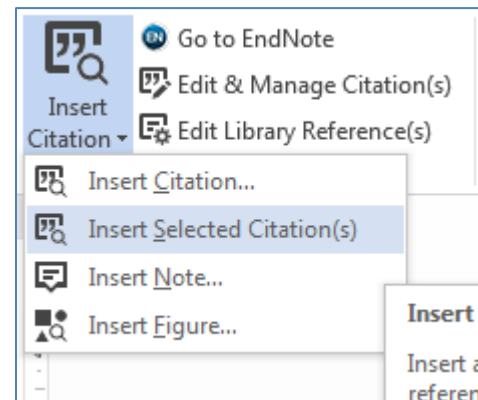
### To attach a figure

- Select a reference in the Library window, or open the reference for editing.
- From the References menu, select Figure > Attach Figure (or right-click in the figure field).
- Add a short caption text below the figure field

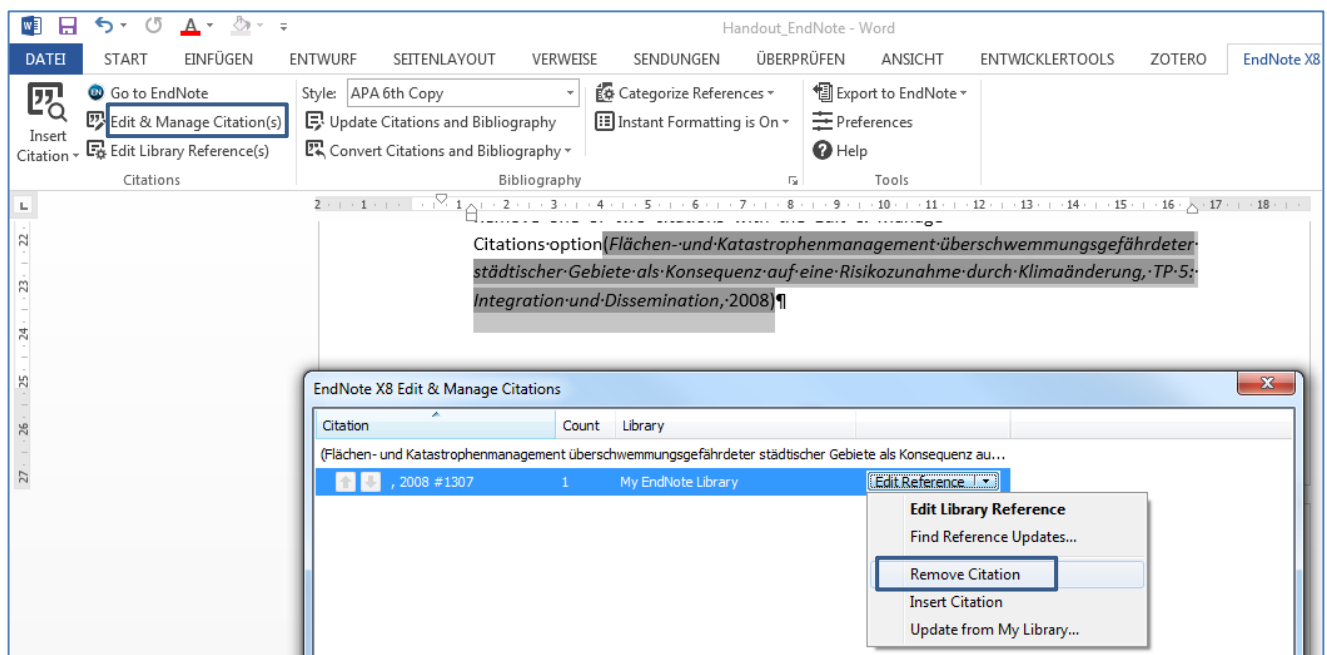


## 7. Use the Cite While You Write Plugin with MS Word to insert in-text citations

- EndNote library must be open
- Start Microsoft Word and open a sample word file
- Position the cursor in the text where you would like to put the citation.
- From the EndNote tab, select Insert Citation.



- In the text box at the top, enter identifying text for EndNote to locate

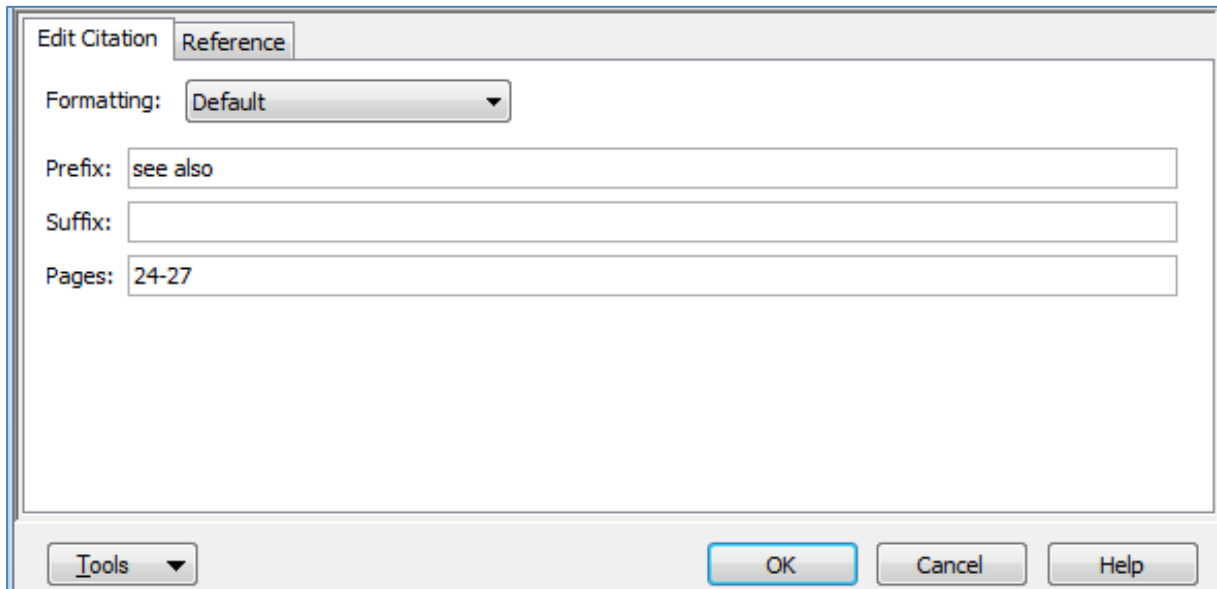


the appropriate reference. (author's last name, a year, a keyword, or any other combination of terms found in the reference)

- Identify and highlight the appropriate reference(s).
- To insert the citation and format it as defined by the currently selected output style
- Another option: highlight 2 references in EndNote and insert the Selected Citation to a paragraph
- Remove one or two citations with the Edit & Manage Citations option

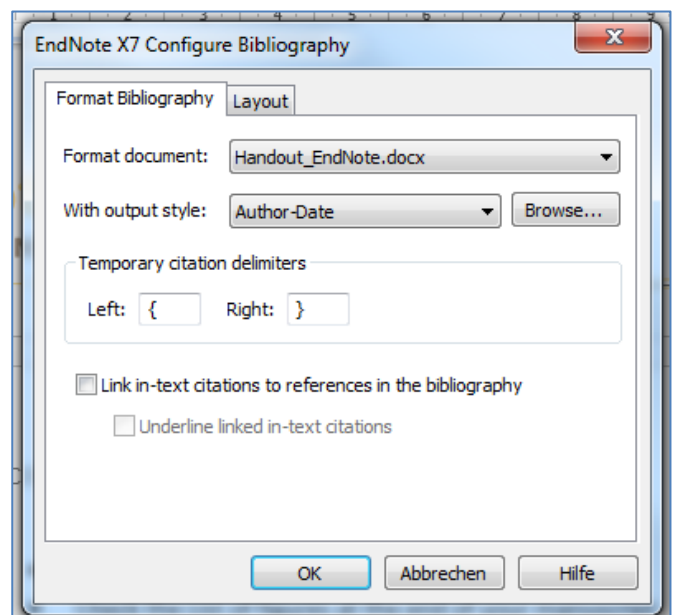
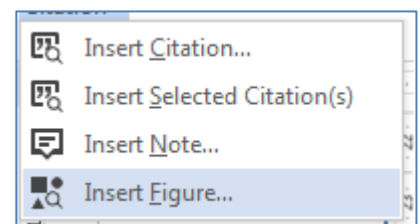
## 8. Format citations in word

- Add page numbers to a citation: Edit & Manage Citation > Edit Citation > Pages field
- Add the prefix "see also\_" to a citation: Edit & Manage Citation > Edit Citation > Prefix field



## 9. Cite your figure from (4) and format your bibliography in Word

- EndNote library and sample word file must be open
- Position the cursor in the text where you would like to refer to the figure.
- From the EndNote tab, select Insert Citation > Insert Figure.
- Search for your figure and click on Insert
- Check the List of figures at the end of your manuscript
- Give your bibliography the title "Reference List" and format the text bold in the bibliography section: EndNote tab > click the bottom corner arrow > Layout.
- Change the Output Style in the drop-down list or in the bibliography section to "Author-Date" for example.





**10. Save a compressed copy of your library (backup)**

- File > Compressed Library (.enlx)
- Set your preferences

