

WALKTHROUGH A

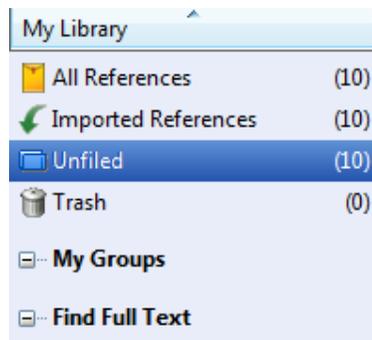
1. Walkthrough Group A

(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 “Save to EndNote desktop” and select the Record Content: “Author, Title, Source, Abstract”
- Go to EndNote and check if the import was successful.



WALKTHROUGH A

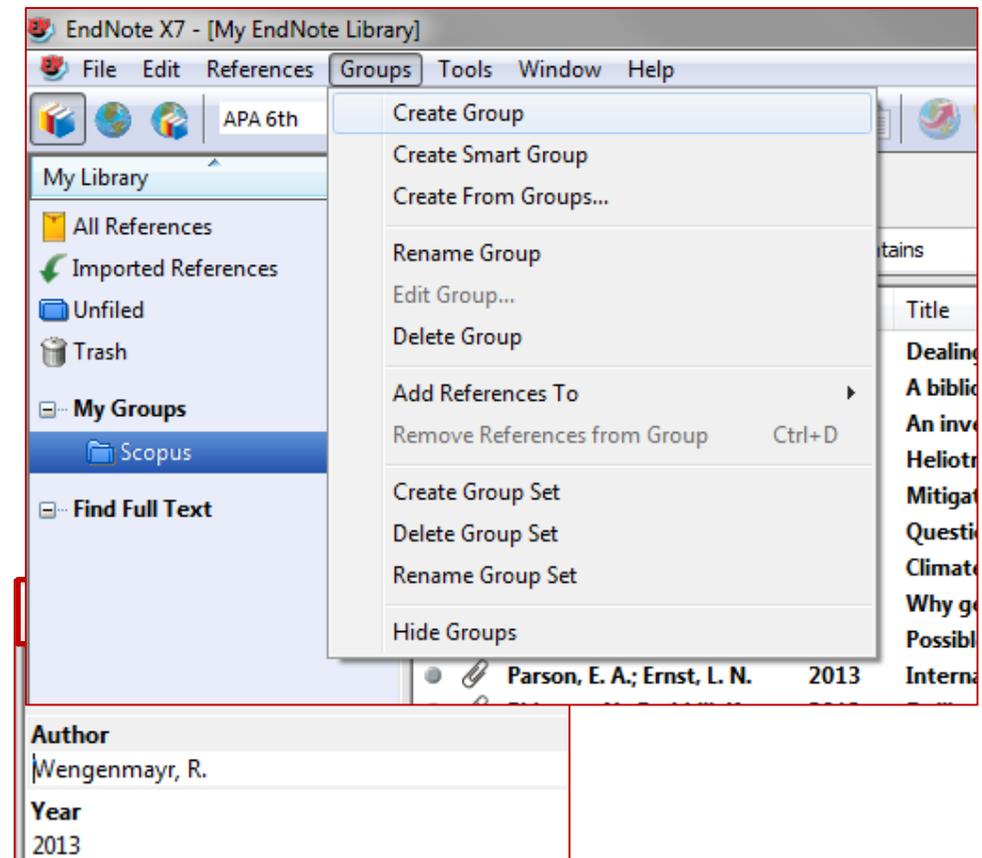
(3) Create custom group

Now you have your first references in your new library. File your references in a new Group and name it. There are 2 ways to create a new custom group.

- Got to “Group” in the menu and select “Create Group”,
- Right-click on “My Groups” in the Group panel on the left side.

The programme will create a new group and you can name it.

- Move your imported search results into your new Custom Group. Mark all references you want to add to your new custom group (STRG+A) and Drag & Drop them. The number of references in the group is displayed right to the name.
- View them in the Reference panel, and switch between “Reference View” and “Preview”. In the Reference view you can check and edit the field entries.
- Select another “Output Style” (dropdown in toolbar) and see the changes in the preview tab: In the Tab panel you will get a preview citation of the default output style. You can change the output style in the toolbar. Just click on the dropdown, try another style and see the changes in the preview tab.
- Review the records to determine if the information is complete. Always check the document type and the field entries after importing new references.
- Correct on or the other field in the as needed. With double click you can see and edit the reference in full screen mode.
- To save the reference, click “File” then “Save” or STRG+S.



WALKTHROUGH A

The screenshot shows the EndNote X7 interface with the 'Author-Date' style selected. The main window displays a list of 15 references. The selected reference is expanded in the right-hand pane, showing its full details.

Author	Year	Title
Belter, C. W.; Sei...	2013	A bibliometric analysis of climate engineering r...
Eric Bickel, J.	2013	Climate engineering and climate tipping-point ...
Amelung, D.; Fu...	2013	Dealing with the uncertainties of climate engli...
Pidgeon, N.; Par...	2013	Deliberating stratospheric aerosols for climate...
Prinn, R. G.	2013	Development and application of earth system ...
Bewick, R.; Lücki...	2013	Heliotropic dust rings for Earth climate engine...
Benduhn, F.; Law...	2013	An investigation of the role of sedimentation f...
Brasseur, G. P.; ...	2013	Mitigation, adaptation or climate engineering?
Scholte, S.; Vasil...	2013	Opening up the societal debate on climate eng...
Zürn, M.; Schäfe...	2013	The paradox of climate engineering
Michael Link, P.; ...	2013	Possible implications of climate engineering fo...
Caldeira, K.; Rick...	2013	Prudence on solar climate engineering
Curvelo, P.	2013	Questioning the geoengineering scientific wor...
Wengenmayr, R.	2013	A Super Climate in the Greenhouse
Gardiner, S. M.	2013	Why geoengineering is not a 'global public goo...

Reference Details:

- Reference Type: Journal
- Reference: 1. Amelung D, Funke J. Dealing with the uncertainties of climate engineering: Warnings from a psychological complex problem solving perspective. *Technology in Society*. 2013;35(1):32-40.
- Author: Amelung, D., Funke, J.
- Year: 2013
- Title: Dealing with the uncertainty problem solving perspective
- Journal: Technology in Society
- Volume: 35
- Issue: 1
- Pages: 32-40
- Start Page: [blank]
- Epub Date: [blank]
- Date: //
- Type of Article: [blank]
- Short Title: [blank]
- Alternate Journal: [blank]
- ISSN: 0160791X (ISSN)
- DOI: 10.1016/j.techsoc.2013.03.001
- Original Publication: [blank]
- Reprint Edition: [blank]
- Reviewed Item: [blank]
- Legal Note: [blank]
- PMCID: [blank]
- Cluster: [blank]
- NIHMSID: [blank]



WALKTHROUGH A

(4) Find Full Text

If you want to find the full text 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“<http://bib.telegrafenberg.de/en/services/author-services/reference-management/endnote/>

At first you have to enter an OpenURL address and an authentication URL under preferences, so you can include our knowledgebase SFX to link directly to full texts available through library subscriptions.

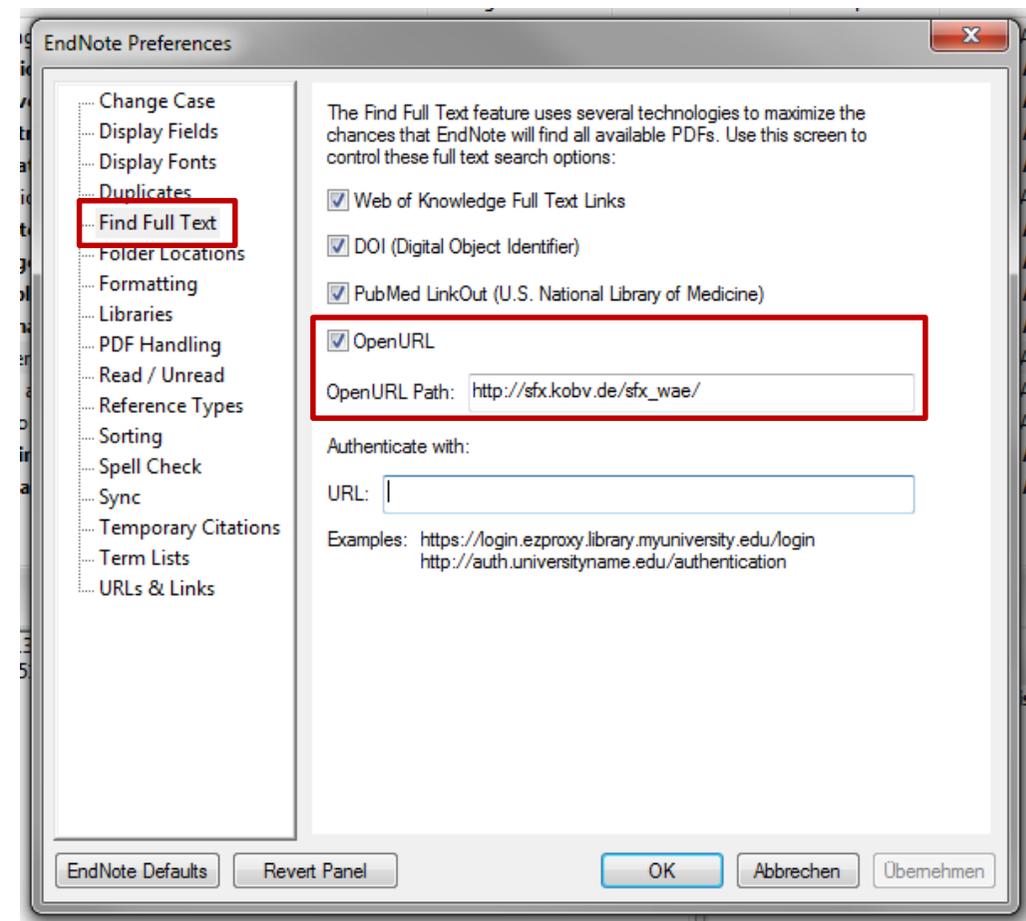
- Got to Menu: Edit > Preferences > OpenURL
- Enable OpenURL (activate checkbox)
- OpenURL Path: http://sfx.kobv.de/sfx_wae/

Select the reference(s) to which you want to add full text and run the Find Full Full text option.

- Select the reference(s) to which you want to add full text.
- Highlight the references in the References panel

From the References menu, select

- Find Full Text > Find Full Text,
- Or you can use the right-click contextual menu to select “Find Full Text”.



EndNote starts to search for and download the full texts for the selected references. (Full text download operates in the background, which may affect the performance of other operations.) The references will appear in groups under a “Find Full Text” group set.

WALKTHROUGH A

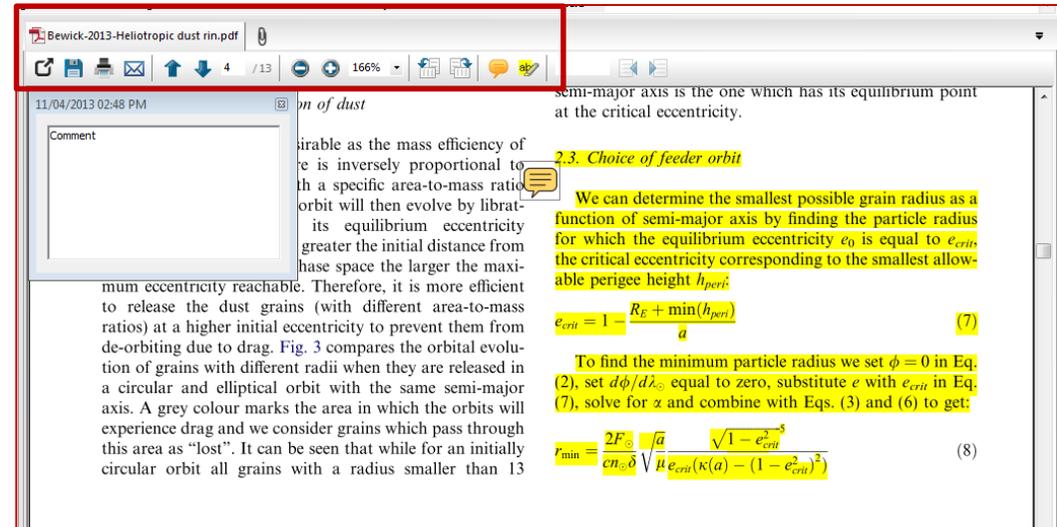
If the automatic download was successful, check the attached pdfs in the integrated pdf viewer and try to add notes or highlight interesting text passages. You will find these functions in the viewer toolbar.

- Highlight a record with an attachment to read and annotate the PDF in the panel or in the full screen mode.
- Use the “Open PDF” icon to move to full view. Only pdf files can be edited, read or annotated in this tab. Use Highlight Text icon to add yellow highlights to selected text
- Select icon
- Click, hold and drag over selected text

Use the Sticky Note icon to add notes

- Select the Sticky Note icon
- Navigate to the section in the PDF where you want to add the sticky note
- Click the left mouse button to display icon
- Double-click the Sticky Note icon to display text box
- Enter comments/text/markup
- Close the comment box and/or click Save icon
- To view a save Sticky Note – double click on it
- To delete a Sticky Note – right click and select delete annotation
- Right click on a Sticky Note to hide all notes and highlights; right click again to show all notes and highlights
- To search for Sticky Note comments go to the Search tab
- From the field pull-down menu select PDF Notes
- Enter search words to the right and click Search button

Use the “Save” icon to save highlights and comments

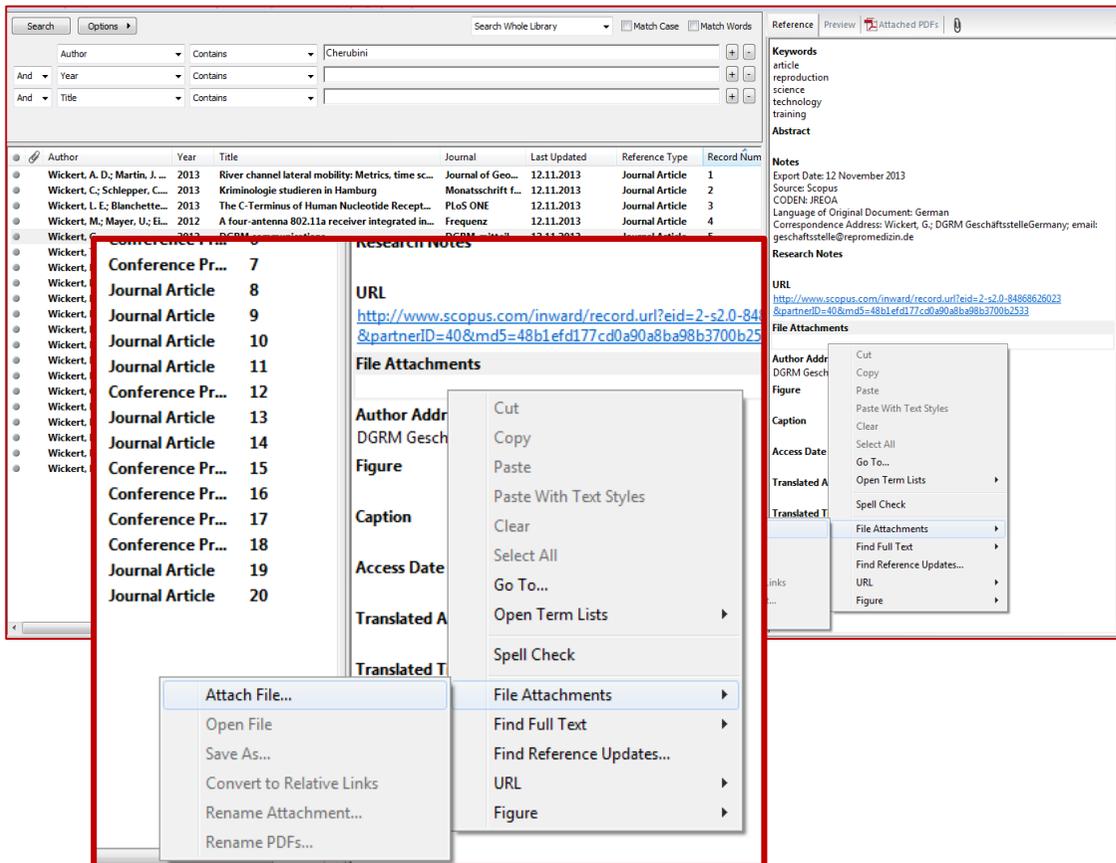


WALKTHROUGH A

(1) Attach pdfs and figures

Attach one pdf to a reference manually from your computer or Z. Select the attachment field in the reference pane and use right-click.

- Highlight a reference in your library
- Right click on it, and choose file attachments, then attach file,
- Select the pdf file.



Copy this file to the default file attachment folder and create a relative link.

The file dialog includes a check box titled, "Copy this file to the default file attachments folder and create a relative link." When the check box is selected, EndNote makes a copy of the original file and places it in the DATA\PDF folder that is part of your EndNote library. This saves the file as a "portable link" that can move as part of the library. When the check box is blank, EndNote will use the complete path and filename to look in the original folder for the inserted file.

- Open the pdf

Attach one figure to a reference manually (workshop set)

- Select the figure field in the reference pane and use right-click (v. s.).
- Type a Caption text into the Caption field.

After inserting a graphic, you should always type Caption text into the Caption field, particularly if you intend to later insert the figure into a Word document. The Caption will label the graphic in the figure list at the end of the Word document. The Caption also helps you search for the figure.

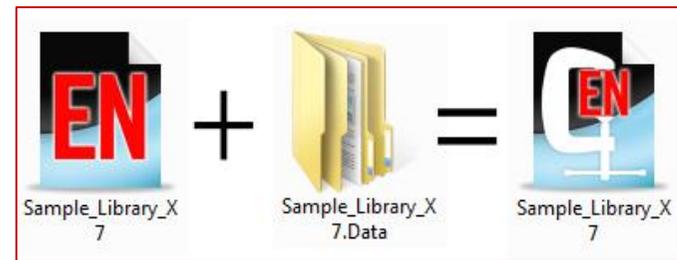


WALKTHROUGH A

(5) Save a Compressed Copy of your Library

You can save your complete library to a single compressed file in order to back up your library or share with a colleague. The pieces of this process are:

- the .enl file + the associated .DATA folder and all of its contents
- the .enlx compressed file that contains both the .enl file and the .data folder



Saving a compressed library

- Go to File > Compressed Library (.enlx)

From the Compressed Library (.enlx) window make appropriate selections (Create or Create & Email – With or Without File Attachments; All References, Selected Reference(s) or All References in Group/Group Set)

- Click Next
- In the Save Compressed Library (.enlx) window, you can keep the same file name and/or rename the file and navigate to the place where you want to save the file;
- Click Save

Restore the compressed library file

- Double-click on the .enlx file; the .enl file and .data folder will be extracted to the same folder where the enlx file is located.
- Open the .enl library to use.

WALKTHROUGH B

2. Walkthrough Group B

(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

Process to import a folder of PDF journal articles:

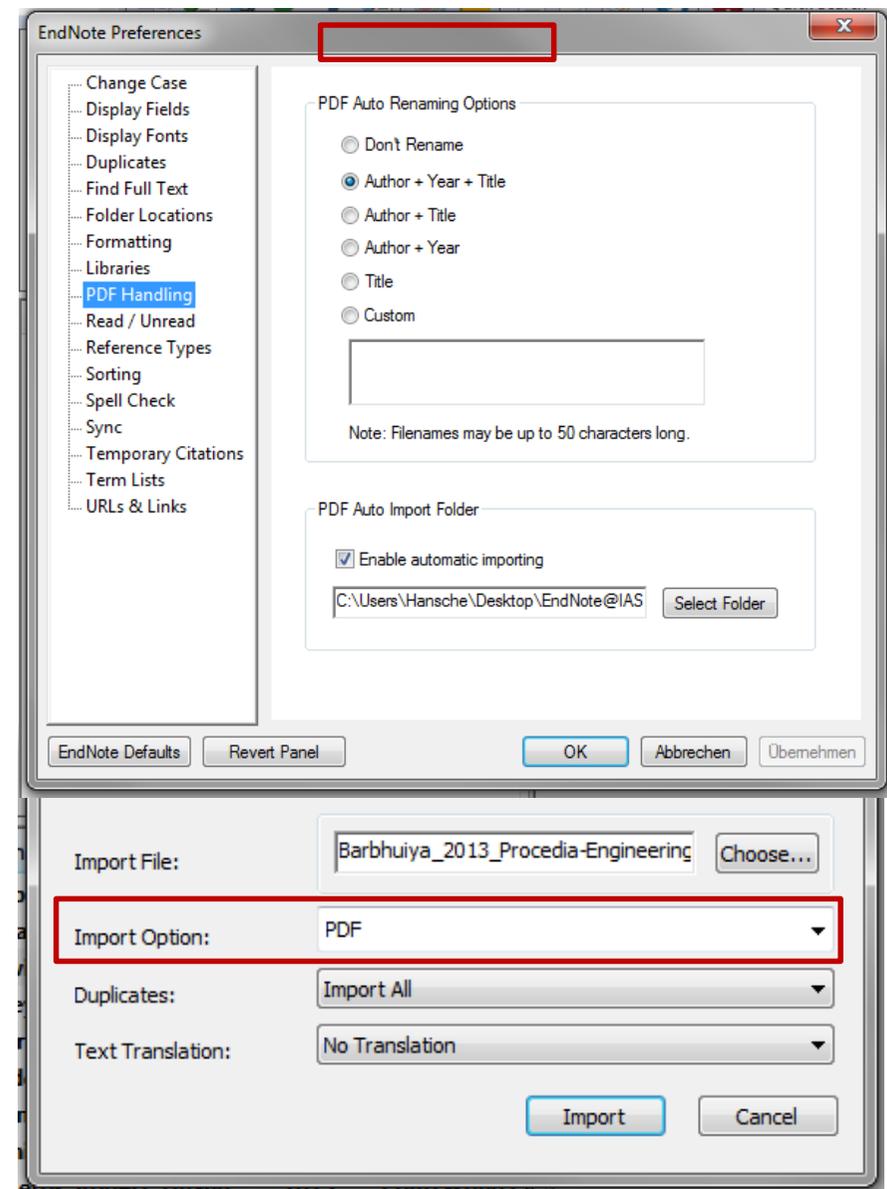
Set pdf preferences:

- Edit>Preferences>PDF Handling to “PDF Auto Renaming Option”:
Author+Year+Title

Import a pdf file from your computer or workshop set:

- Open EndNote Library
- Select File > Import > File
- From the Import File dialog box click the Choose button to navigate to the PDF file
- Select the PDF, click OK
- From the Import Option list select PDF
- Select an option from the Duplicates list: Import All, Discard Duplicates, Import into Duplicates Library
- Click Import button,

The PDFs are imported based on the DOI associated with the journal article PDF.

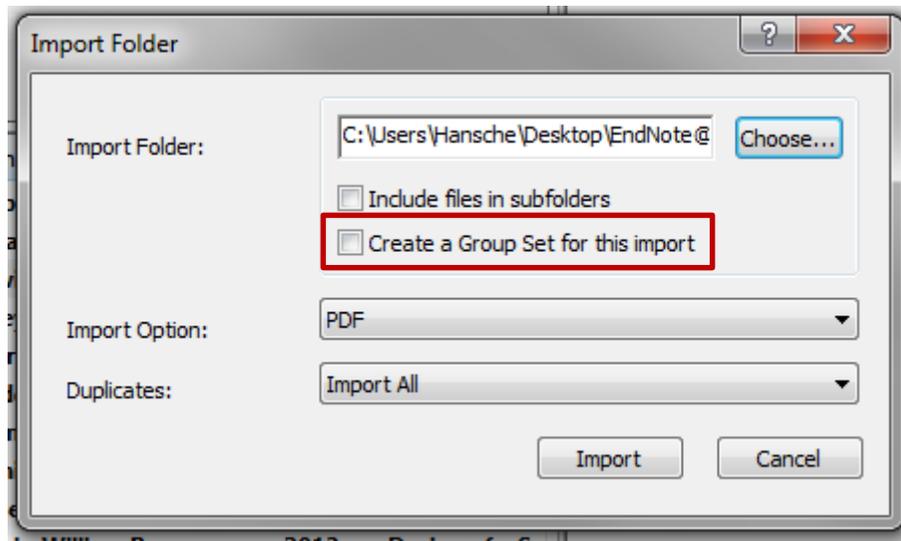


WALKTHROUGH B

Import a folder of pdf journal articles from your computer or workshop set

- Follow the about procedure to import PDF files from folder by selected File > Import > Folder and select the folder.
- Create a “Group Set” for the import

In the “My Library” panel, click on the “Imported References” temporary group. Review the records to determine if the information is complete.



(3) Create custom group

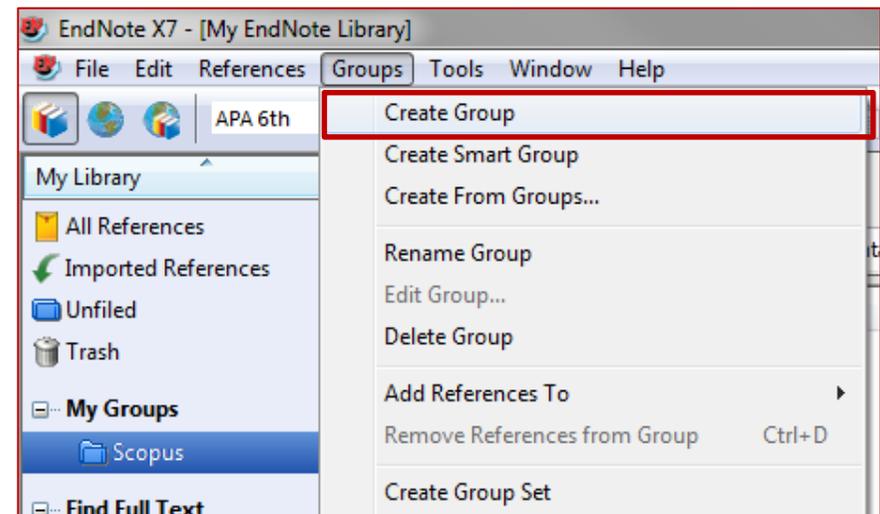
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The programme will create a new group and you can name it.

- Move your imported search results into your new Custom Group. Mark all references you want to add to your new custom group (STRG+A) and Drag & Drop them. The number of references in the group is displayed right to the name.
- View them in the Reference panel, and switch between “Reference View” and “Preview”. In the Reference view you can check and edit the field entries.
- Select another “Output Style” (dropdown in toolbar) and see the changes in the preview tab: In the Tab panel you will get a preview citation of the default output style. You can change the output style in the toolbar. Just click on the dropdown, try another style and see the changes in the preview tab.
- Review the records to determine if the information is complete.



WALKTHROUGH B

- Always check the document type and the field entries after importing new references.
- Correct on or the other field in the as needed.
- With double click you can see and edit the reference in full screen mode.
- To save the reference, click “File” then “Save” or STRG+S.

The screenshot displays the EndNote X7 interface. The top menu bar includes File, Edit, References, Groups, Tools, Window, and Help. A search bar is visible with the text 'Search Whole Library' and options for 'Match Case' and 'Match Y'. The left sidebar shows 'My Library' with options like 'All References', 'Imported Refs', and 'Unfiled'. The main area is divided into a search results table and a detailed reference view.

Author	Year	Title
Belter, C. W.; Sei...	2013	A bibliometric analysis of climate
Eric Bickel, J.	2013	Climate engineering and climate t
Amelung, D.; Fu...	2013	Dealing with the uncertainties of
Pidgeon, N.; Par...	2013	Deliberating stratospheric aerosol
Prinn, R. G.	2013	Development and application of e
Bewick, R.; Lücki...	2013	Heliotropic dust rings for Earth cli
Benduhn, F.; Law...	2013	An investigation of the role of seed
Brasseur, G. P.; ...	2013	Mitigation, adaptation or climate c
Scholte, S.; Vasil...	2013	Opening up the societal debate on
Zürn, M.; Schäfe...	2013	The paradox of climate engineerin
Michael Link, P.; ...	2013	Possible implications of climate en
Caldeira, K.; Rick...	2013	Prudence on solar climate enginee
Curvelo, P.	2013	Questioning the geoengineering s
Wengenmayr, R.	2013	A Super Climate in the Greenhous
Gardiner, S. M.	2013	Why geoengineering is not a 'glob

The detailed view on the right shows the reference type 'Journal Article' and the author 'Amelung, D. Funke, J.'. The reference text is: '1. Amelung D, Funke J. Dealing with the uncertainties of climate engineering: Warnings from a psychological complex problem solving perspective. Technology in Society. 2013;35(1):32-40.'

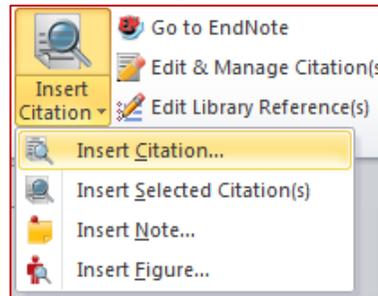
WALKTHROUGH B

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

- Open the sample word file

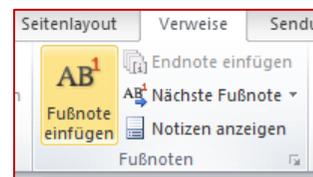


- Place the cursor in the text and insert a citation to the first paragraph in your word file. Use the “Insert Citation” in the EndNote tab
- Highlight 2 references in the EndNote programme and insert the “Selected Citation” to a paragraph
- Drag and drop up to 3 references from your EndNote library into your manuscript (instant formatting might take some time)
- Remove some citations with the “Edit & Manage Citations” option



(5) Cite references in a footnote

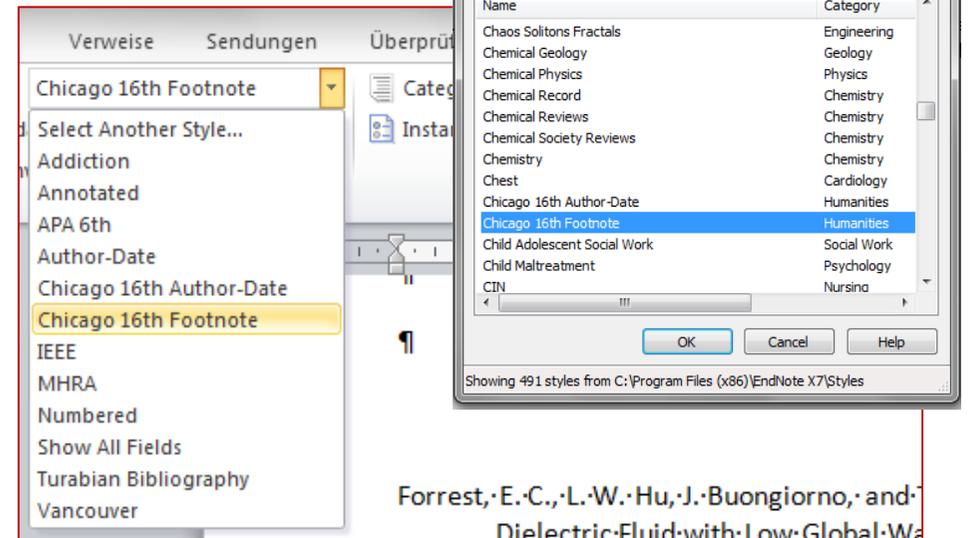
Create a footnote in the word file



- Use the appropriate command in Word to create the footnote or endnote. (EndNote does not create the footnote in the document, but is used to insert and format citations in the note.)
- Position the cursor in the footnote or endnote where you would like the citation to appear.

Insert a citation into the footnote area.

- Use one of the options from before.
- Change the Output Style in the dropdown or in the bibliography section to “Chicago 16th footnote”. In case the style is not in the dropdown,
- Go to Select Another Style.
- Search in the list of styles for Chicago 16th footnote
- Click OK
- The style will be added to your favorites



WALKTHROUGH B

(6) Save a Compressed Copy of your Library

You can save your complete library to a single compressed file in order to back up your library or share with a colleague. The pieces of this process are:

- the .enl file + the associated .DATA folder and all of its contents
- the .enlx compressed file that contains both the .enl file and the .data folder

Saving a compressed library

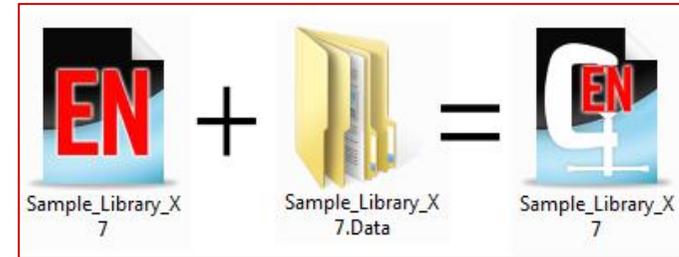
- Go to File > Compressed Library (.enlx)

From the Compressed Library (.enlx) window make appropriate selections (Create or Create & Email – With or Without File Attachments; All References, Selected Reference(s) or All References in Group/Group Set)

- Click Next
- In the Save Compressed Library (.enlx) window, you can keep the same file name and/or rename the file and navigate to the place where you want to save the file;
- Click Save

Restore the compressed library file

- Double-click on the .enlx file; the .enl file and .data folder will be extracted to the same folder where the enlx file is located.
- Open the .enl library to use.



3. Walkthrough Group C

(1) Create a new library

(2) Export references from the Scopus database and import them into EndNote

Go to the EndNote website <http://endnote.com/downloads/filters> and download the import filter for Scopus:

- Search term= Elsevier.

Click on download button next to Scopus database and open the filter with EndNote programme.

Open the database Scopus in your browser and search for “Climate Engineering” and “2013”. Select the first 10–15 references and export them into your EndNote library. You can check the preferred references manually, check “All” for all results or “Page” for all results on the page. When you are finished, just click on “Export”.

USE THE FILTER FINDER BELOW TO LOCATE A FILTER FOR A SPECIFIC INFORMATION PROVIDER.

INFORMATION PROVIDER

Information Provider	Database	Date	
Elsevier	Scopus	2012-05-04	<input type="button" value="DOWNLOAD"/>
Elsevier	ScienceDirect	2009-09-16	<input type="button" value="DOWNLOAD"/>
Elsevier	Scirus	2009-09-16	<input type="button" value="DOWNLOAD"/>
Elsevier	EMBASE.com	2008-09-26	<input type="button" value="DOWNLOAD"/>

Document search | Author search | Affiliation search | Advanced search

Search for: "climate engineering" in Article Title, Abstract, Keywords ?

E.g., "heart attack" AND stress

Limit to:

Date Range (inclusive)
 Published: 2013 - to: Present

Added to Scopus in the last 7 days

Document Type

Subject Areas ⓘ

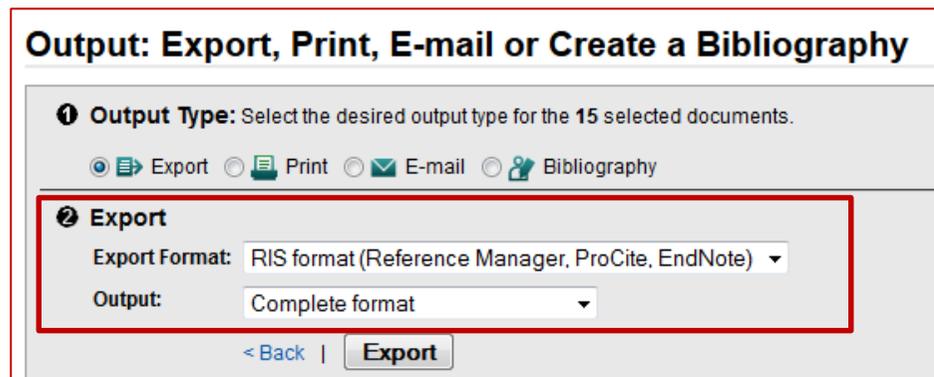
Life Sciences (> 4,300 titles.) Physical Sciences (> 7,200 titles.)

Health Sciences (> 6,800 titles. 100% Medline coverage) Social Sciences & Humanities (> 5,300 titles.)

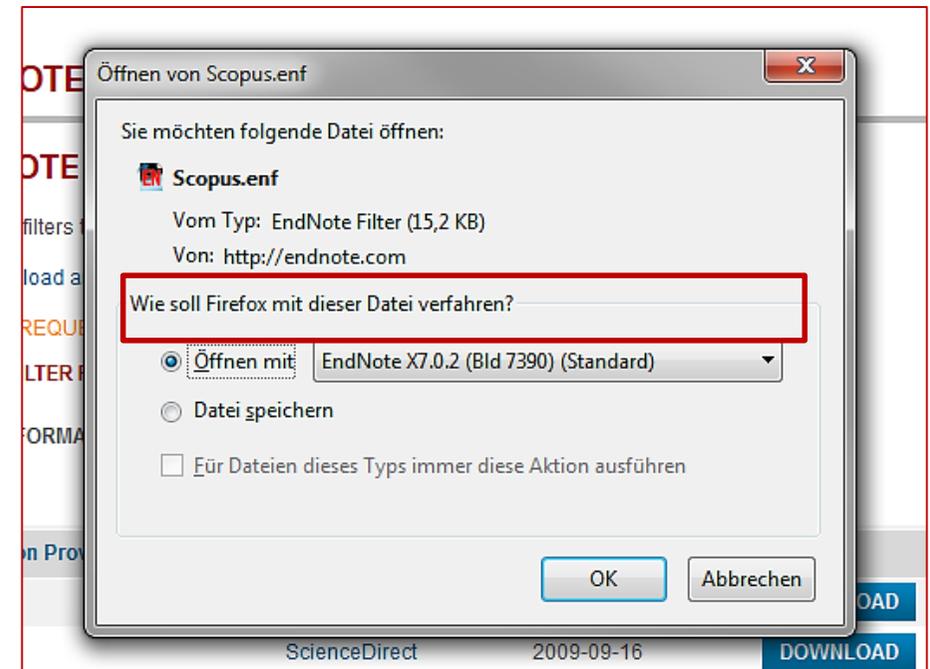
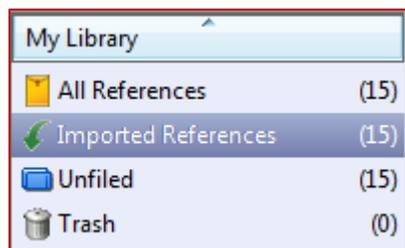
WALKTHROUGH C

You will be forwarded to the export dialog. Here you can choose the “Output Type” (export, print, e-mail or bibliography) and select a proper “Export Format”.

- Choose the format “RIS format” for EndNote and the complete format
- Click on “Export”.



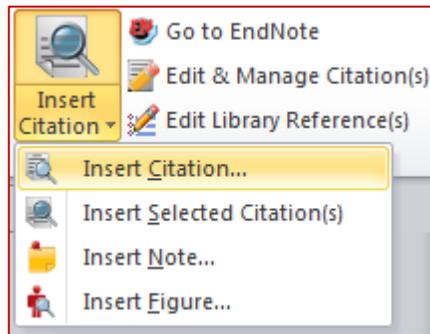
- Open the file with the EndNote programme and click on OK
- Check if the import was successful in EndNote. You should find your new references in the “Imported References



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



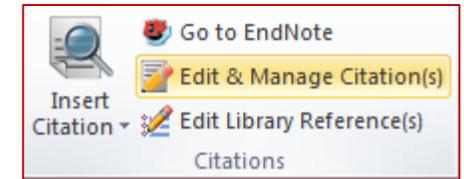
- Open the sample word file
- Place the cursor in the text and insert a citation to the first paragraph in your word file. Use the “Insert Citation” in the EndNote tab



- Highlight 2 references in the EndNote programme and insert the “Selected Citation” to a paragraph
- Drag and drop up to 3 references from your EndNote library into your manuscript (instant formatting might take some time)
- Remove some citations with the “Edit & Manage Citations” option

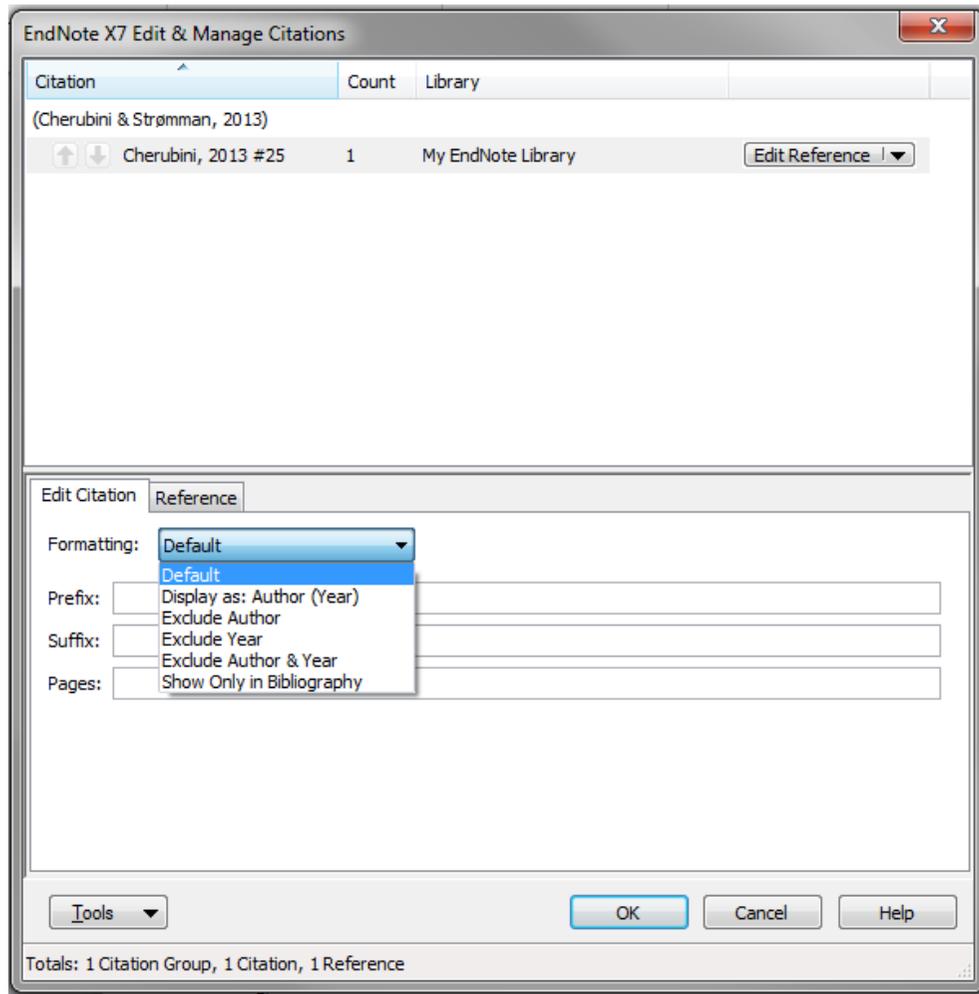
(4) Format citations in word

- Add page numbers to a citation (EndNote tab > “Edit & Manage Citation” dialog)
- Add the prefix “see also” to a citation (EndNote tab > “Edit & Manage Citation” dialog,



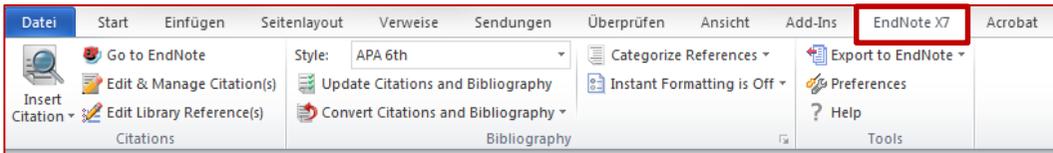
WALKTHROUGH C

- Exclude the author from a citation (“Edit & Manage Citation” dialog > Dropdown “Formatting”)

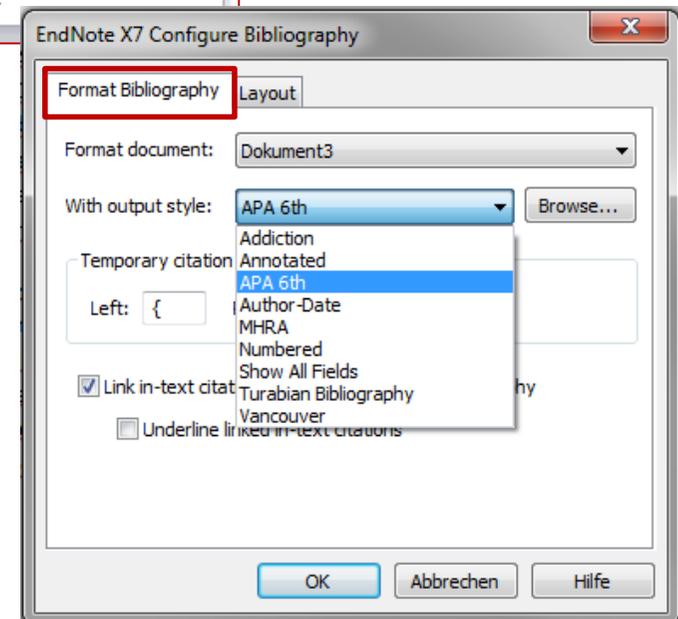
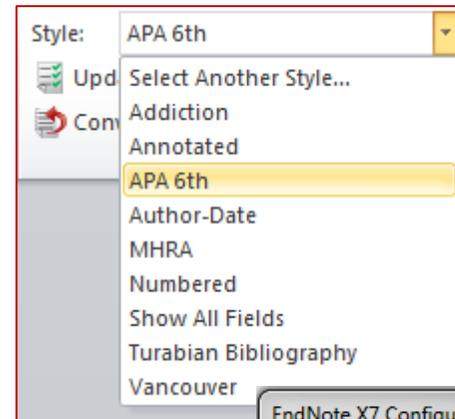
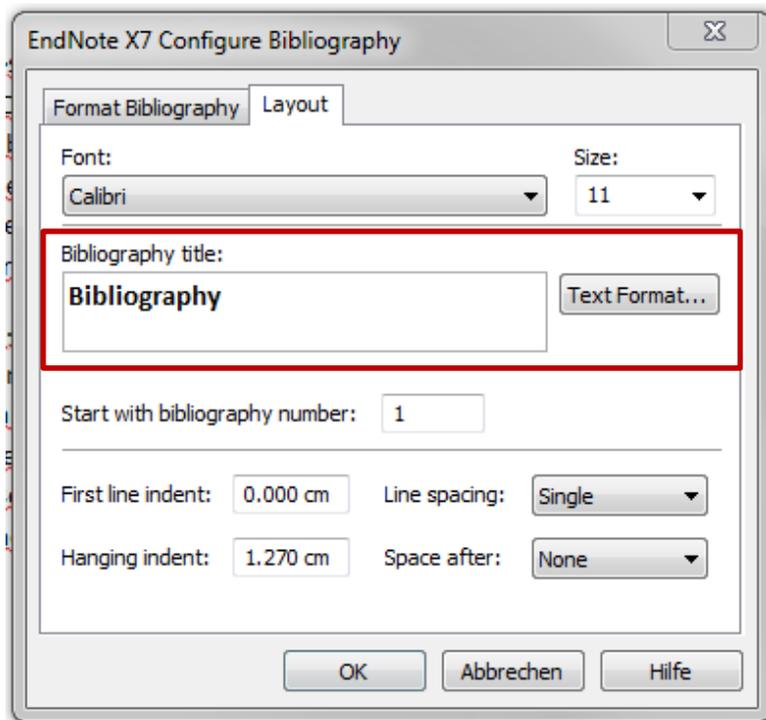


(5) Format a bibliography in word

- Change the “Output Style” in the dropdown or in the bibliography section. An output style represents the rules for determining how references look when you print, export, preview or create bibliographies.



- Give your bibliography a title and format the text bold in the bibliography section. (EndNote tab > click the bottom corner arrow > Layout)



WALKTHROUGH C

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

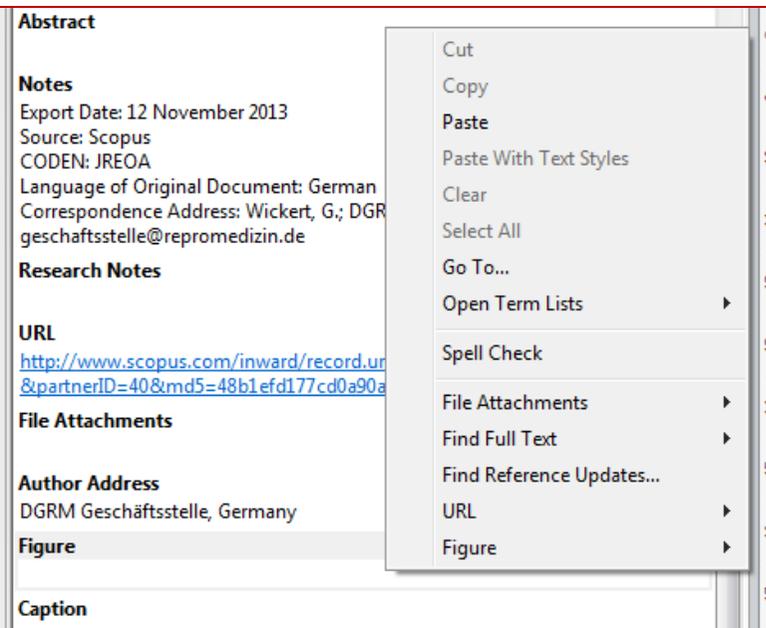
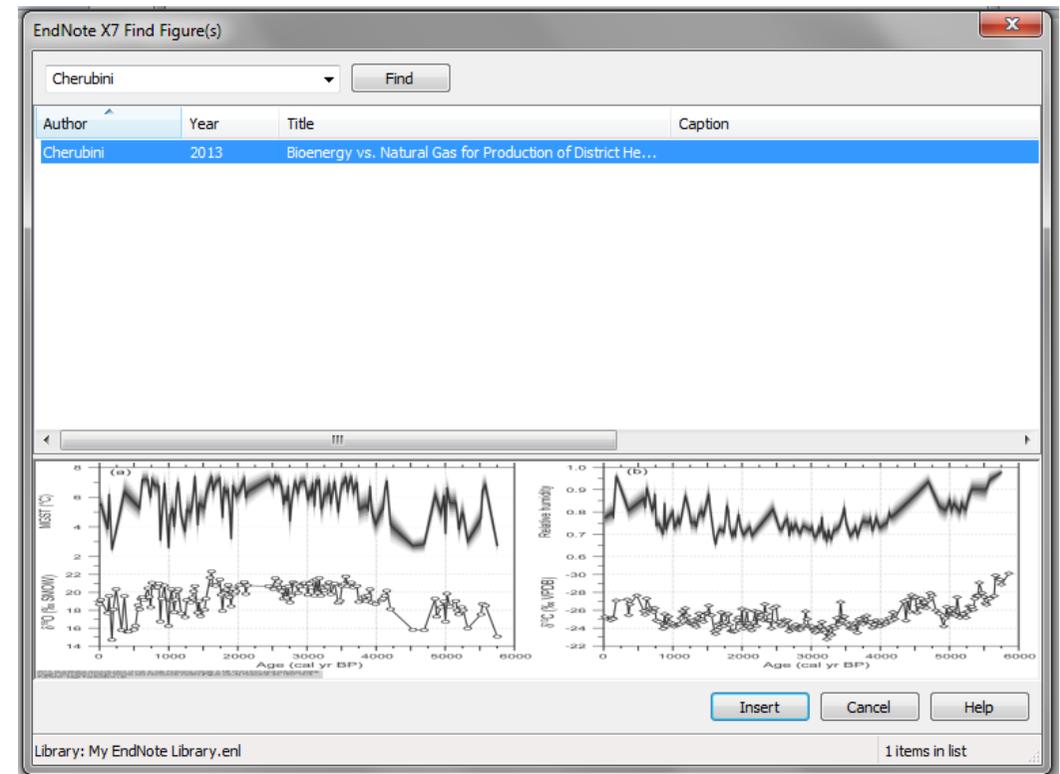
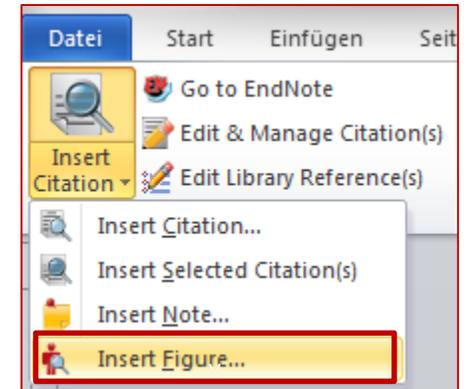
Attach one figure to a reference manually (workshop set)

- 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.
- After inserting a graphic, you should always type Caption text into the Caption field, particularly if you intend to later insert the figure into a Word document. The Caption will label the graphic in the figure list at the end of the Word document. The Caption also helps you search for the figure.

Go back in the sample word file and place the cursor in the text

Use the “Insert Citation” option to insert the figure in Word. The “Find Figure” dialog will open and you can search for the figure in your EndNote library.

The Plugin creates a citation for the figure and adds a list of figures to the manuscript.

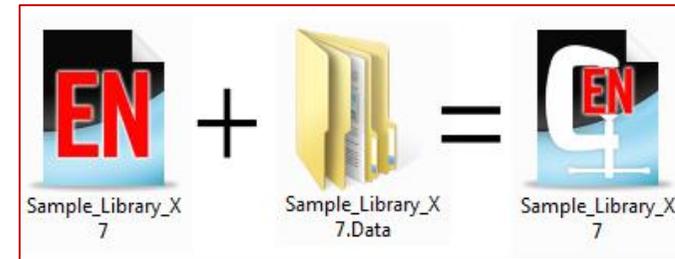


WALKTHROUGH C

(7) Save a Compressed Copy of your Library

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- Click Next
- In the Save Compressed Library (.enlx) window, you can keep the same file name and/or rename the file and navigate to the place where you want to save the file;
- Click Save

Restore the compressed library file

- Double-click on the .enlx file; the .enl file and .data folder will be extracted to the same folder where the enlx file is located.
- Open the .enl library to use.

➤ .

WALKTHROUGH D

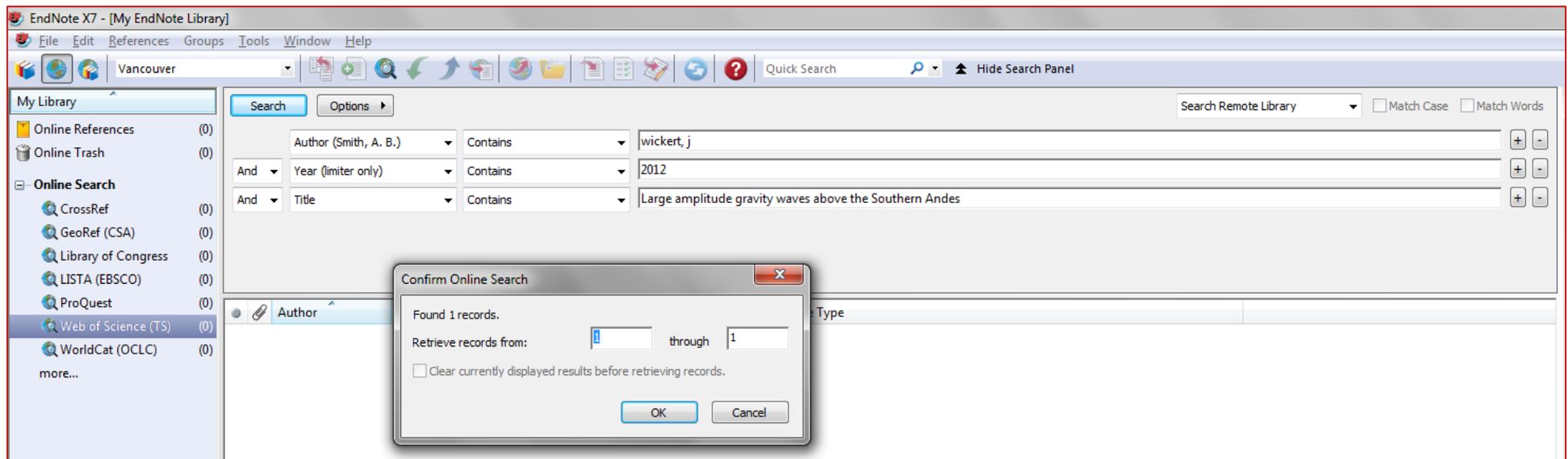
4. Walkthrough Additional Questions Group D –

(1) Online Search 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
- Use the Online Search Mode
- Copy the citation into your local library

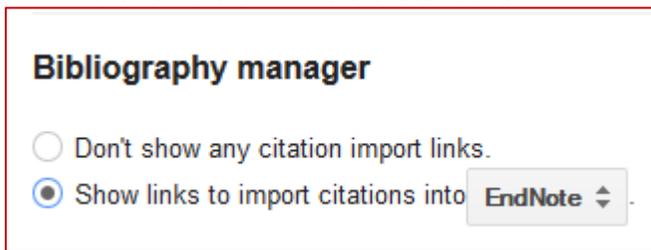


(2) Import references from Google Scholar

Search references with the following search terms: **Climate Engineering** from **2013**.

Go to Google Scholar: <http://scholar.google.com/> and configure the settings in Google Scholar first to see the citation import links in the results list.

- Click on the "Scholar Preferences" link.
- Under "Bibliography Manager", select the option "Show links to import citations into" and choose "EndNote" in the drop down box.
- Click on the "Save Preferences" button.



Perform a search in **Google Scholar** and export your search results into your EndNote library. Configure the settings in Google Scholar first to see the citation import links in the results list. Send single references to EndNote by clicking on the "Import into EndNote" link.

Export your search results into your EndNote library.

- Send single references to EndNote by clicking on the "Import into EndNote" link.



Import search results into EndNote:

- After performing a search on Google Scholar, click on the "Import into EndNote" link for the reference you want to import.
- If you are presented with a window asking if you want to "Open" or "Save" the file, choose to open the file.
- A "Select a Reference Library" window will appear; use this window to select the EndNote library you want the reference imported into.

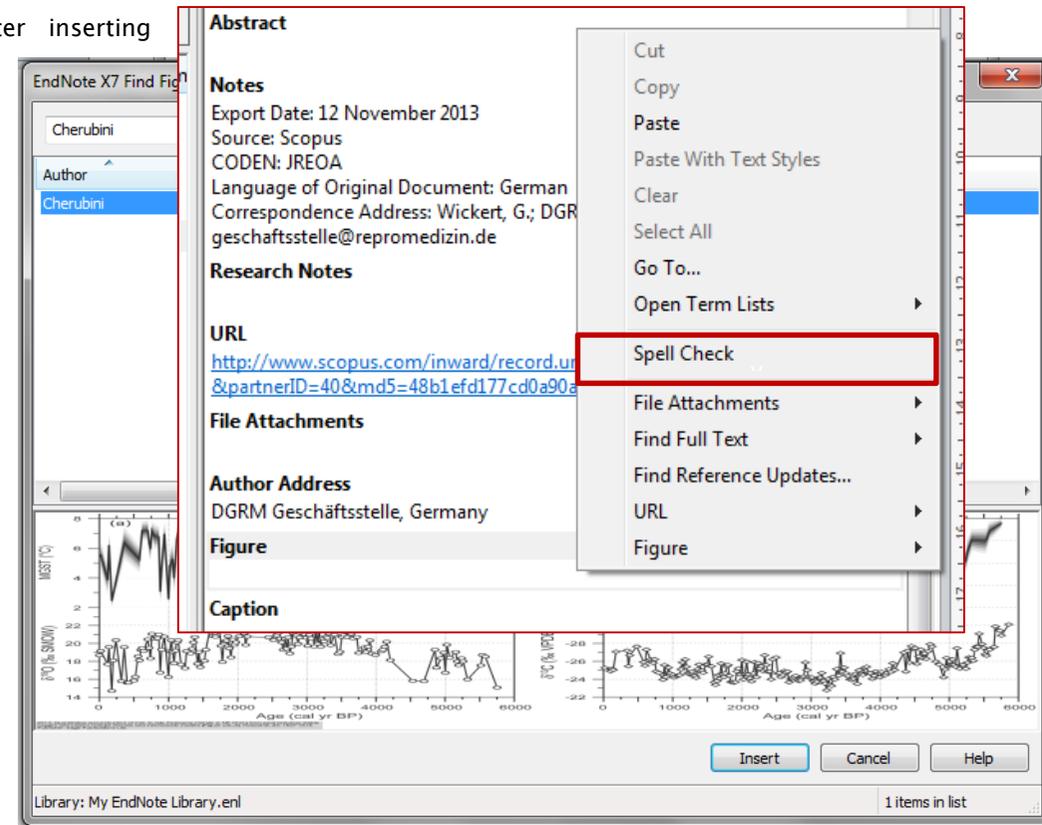
WALKTHROUGH D

(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.

After inserting



a graphic, you should always type Caption text into the Caption field, particularly if you intend to later insert the figure into a Word document. The Caption will label the graphic in the figure list at the end of the Word document. The Caption also helps you search for the figure.

Go back in the sample word file and place the cursor in the text

Use the "Insert Citation" option to insert the figure in Word. The "Find Figure" dialog will open and you can search for the figure in your EndNote library.

WALKTHROUGH D

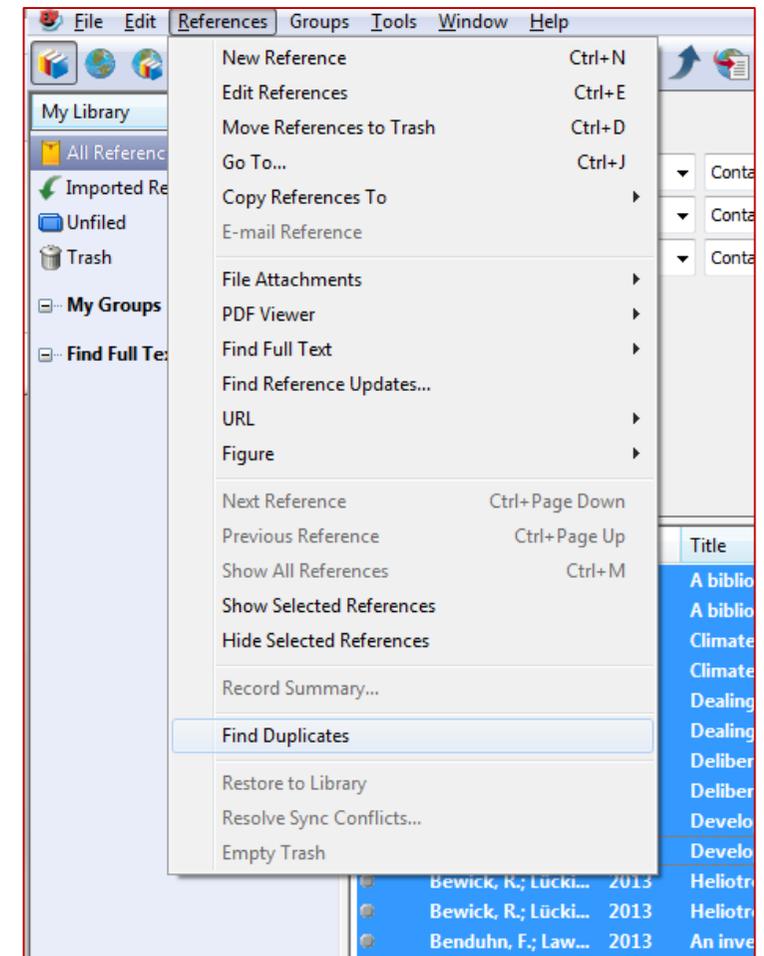
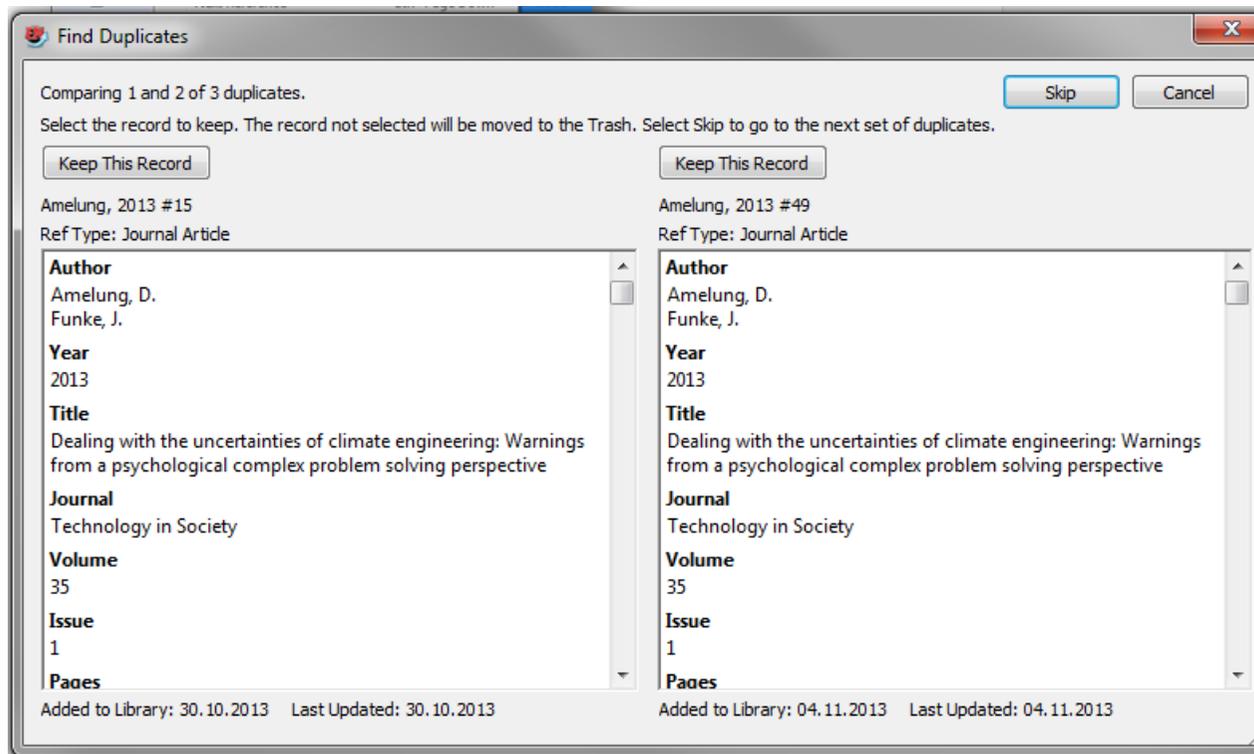
The Plugin creates a citation for the figure and adds a list of figures to the manuscript.

WALKTHROUGH D

(4) Duplicate control

Perform the same search in Scopus/WoS/Google Scholar 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 duplicate items from your library.



WALKTHROUGH D

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

Check document types and edit fields in the reference pane as needed

- Use the Reference tab to edit a record
- Highlight reference and select the Reference tab from panel on right; hide empty fields with the Toolbar Options
- Use scroll bar to move through record
- Edit fields as needed

The screenshot shows the EndNote X7 interface. On the left, the 'My Library' pane shows a list of reference groups: All References (31), Imported References (11), Unfiled (20), Trash (0), pdfs (11), and My Groups. The main pane displays a table of references sorted by Author. The selected reference is 'Opening up' geoeengineering appraisal: Multi-Criteria Mapping of options for tackling climate change' by Bellamy, Rob; Chilvers, Jason; Vaughan, Naomi E.; Lenton, Timothy M. The right pane shows the details for this reference, including Author, Year, Title, Journal, Volume, Issue, Pages, Start Page, Epub Date, Date, Type of Article, Short Title, and Alternate Journal.

Author	Year	Title	Journal	Last Updated	Reference Type	Record Num
Barbhuiya, Saadia; Barbh...	2013	Adaptation to the Future Climate: A Low Carbo...	Procedia Engin...	14.11.2013	Journal Article	21
Bellamy, Rob; Chilvers, Ja...	2013	'Opening up' geoeengineering appraisal: Multi-C...	Global Environ...	14.11.2013	Journal Article	22
Bewick, R.; Lücking, C; C...	2013	Heliotropic dust rings for Earth climate engine...	Advances in Sp...	14.11.2013	Journal Article	23
Carey, Mark; Baraer, Mic...	2013	Toward Hydro-Social Modeling: Merging Hum...	Journal of Hydr...	14.11.2013	Journal Article	24
Cherubini, Francesco; Str...	2013	Bioenergy vs. Natural Gas for Production of DL...	Energy Procedia	14.11.2013	Journal Article	25
Cradden, Lucy C; Harris...	2013	Adapting overhead lines to climate change: Ar...	Energy Policy	14.11.2013	Journal Article	26
Khan, Iftekhar; Chowdhu...	2013	The Effect of Climate Change on Power Gener...	Procedia Engin...	14.11.2013	Journal Article	27
Monirul Islam, Md; Sallu, ...	2014	Limits and barriers to adaptation to climate var...	Marine Policy	14.11.2013	Journal Article	28
Sisneros, Robert; Huang, ...	2013	Contrasting Climate Ensembles: A Model-based...	Procedia Comp...	14.11.2013	Journal Article	29
Travis, William R.	2013	Design of a Severe Climate Change Early Warni...	Weather and CL...	14.11.2013	Journal Article	30
Welch, Aaron; Gaines, Sa...	2012	Climate engineering: The way forward?	Environmental ...	14.11.2013	Journal Article	31

Sort and order your references by author, year, and reference type. You can change the sort order by selecting Sort Library from the Tools menu or by clicking the column headings. To change the sort order:

- Click in the reference list.
- From the Tools menu, select Sort Library.
- Select one or more field names from the menus. Enter the field names in the order you want the references sorted. You do not have to use all five options.
- Click the button to the right of each field to indicate ascending or descending order.
- Click OK.

WALKTHROUGH D

Use the quick search in the toolbar

- Use to search entire library for specific references
- Type in word or phrase and press Enter
- EndNote executes a general search of all fields
- Use the drop down list to select a recent search term
- Quick Search also searches within PDF files



Search EndNote Library with search panel

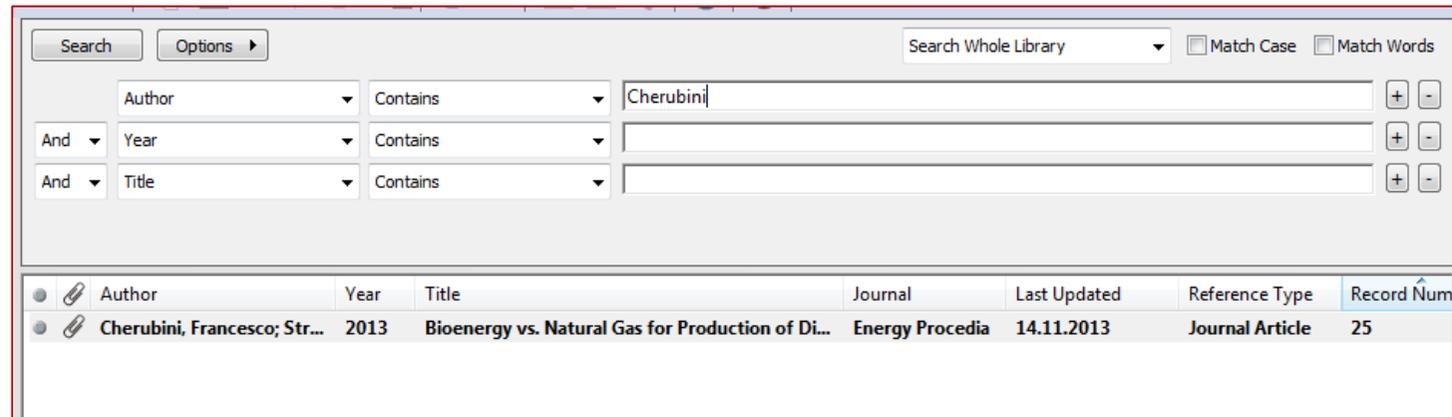
- Search Panel is at the center-top of the page to search All References or references in a Group
- Searches can be saved for future use
- Pull down menus to limit words to a field
- Boolean operators AND, OR, NOR are available on left
- Add or removed boxes for criteria by using the plus and minus boxes to the right
- Enter search terms and click Search
- Results display in reference panel

Create a “Smart group” for an author or another keyword.

Smart groups are built with search strategies and are dynamically updated as you add references to and edit references in the library.

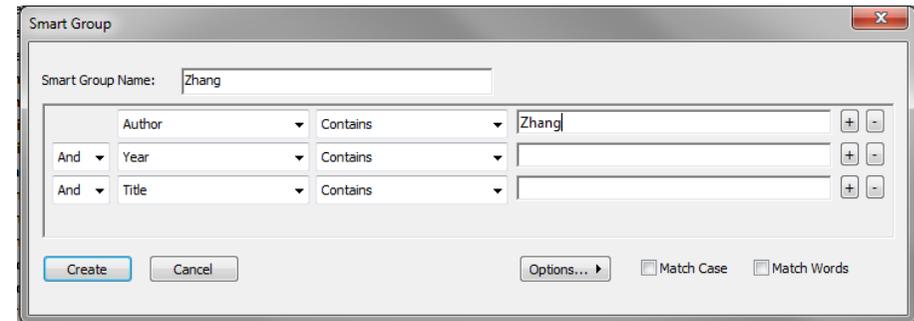
To create a smart group: 

- Display the set of references that you would like to search. This would



typically be “All References”.

- From the Groups menu, select “Create Smart Group”. A search dialog appears.
- Enter a name for the group, then your search strategy, and then click Create.



WALKTHROUGH D

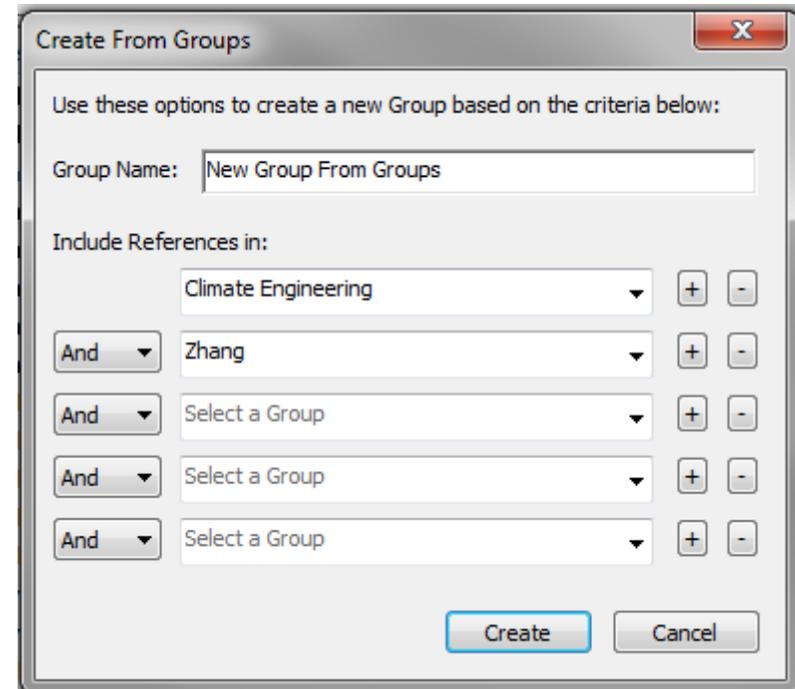
Create a “Combined group”.

Combine custom and smart groups under a single group to better organize your EndNote references. Use AND, OR, and NOT logic to create new, useful combined group sets. Save references in custom and smart groups, and then save these sets of groups as a combined group set.

To create a combination group:



- From the Groups panel, select “Create from Groups” to display the Create from Groups dialog.
- Enter a name for the combination group.
- In the fields under the Include References heading, select up to 10 custom and/or smart groups to use as your search criteria.
- Use AND, OR, NOT to include or exclude custom and/or smart groups in your combined group set.



WALKTHROUGH D

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

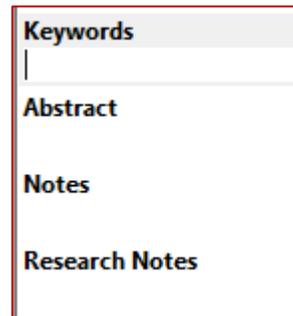
Use the Notes field to store personal reminders, such as the location of a quotation in a book or the quotation itself. Use the Abstract field for a brief description of the contents of the work.

To add a note or abstract to one reference

- Double click on the reference to which you wish to add a note.
- Reference opens and you can navigate to the “Note” or “Abstract” field to add an entry.

To add a keyword to on reference

Use the Keywords field to store keywords that you want to associate with the reference. You can restrict a search to just the Keywords field, so the terms you enter into this field can be used to later retrieve the references when using EndNote’s Search command.

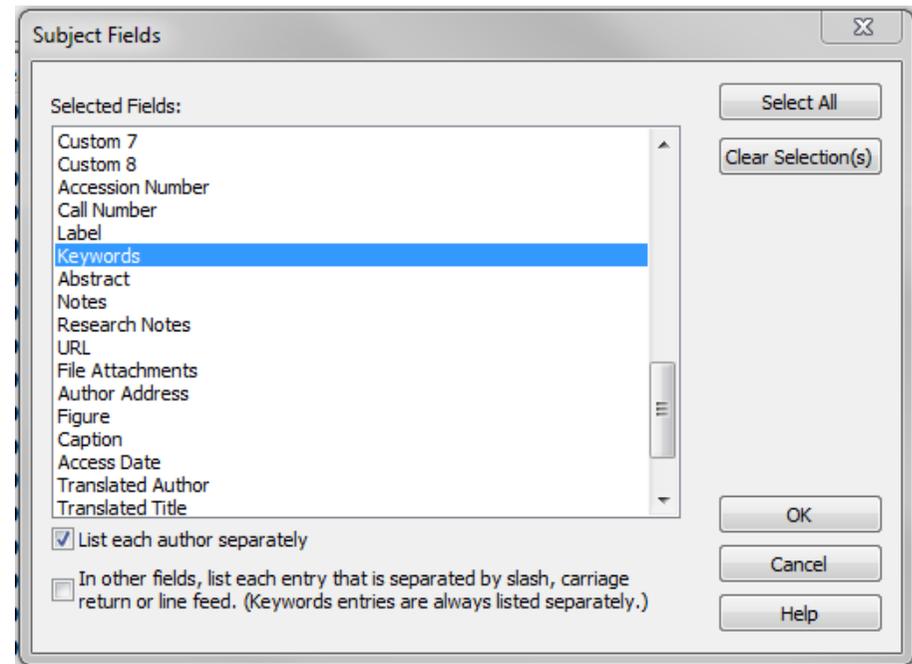


(7) Create a “Subject bibliography”

Create a subject bibliography for with your keywords:

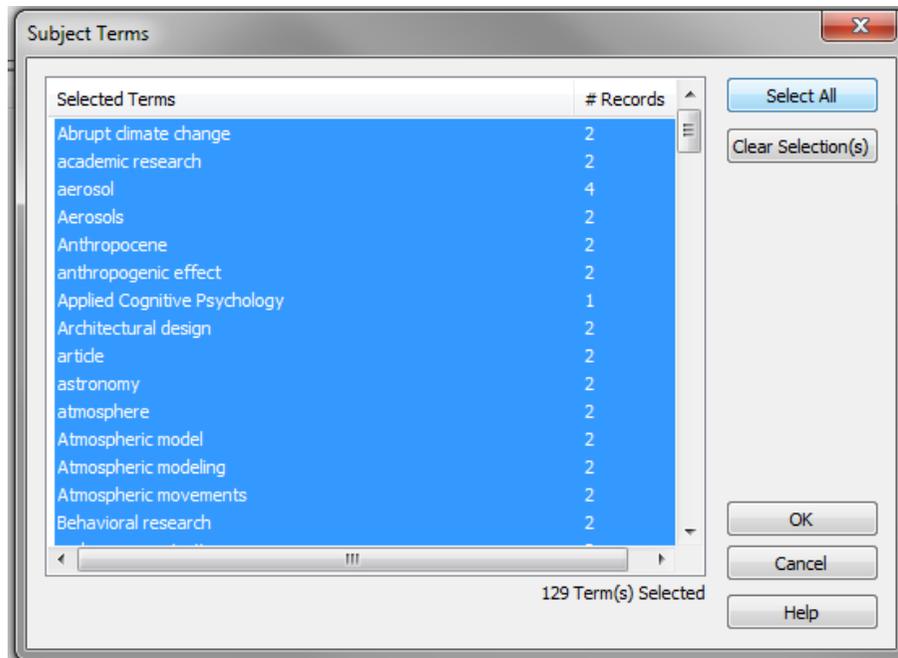
- Highlight only the references you wish to include in a subject bibliography.
- From the Tools menu, select Subject Bibliography to display a list of the EndNote fields by default field name.
- Highlight the field(s) whose contents you wish to use as subject headings. For example: **Keywords**

- You can include any number of fields.
- Click OK to display the terms found in the fields you selected.



- Select those terms you wish to include as subject headings.
- To quickly select all terms or clear all terms, use the buttons to the right of the dialog.
- Click OK to format the subject bibliography on the screen.

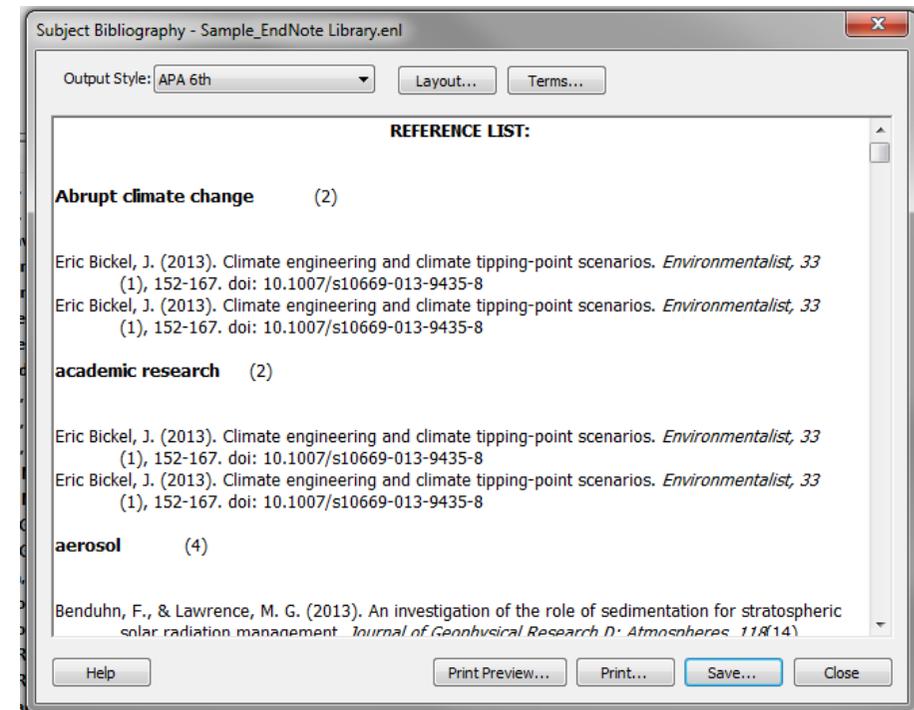
WALKTHROUGH D



- Click on the Layout button to modify the layout and style of your subject bibliography.
- Click OK to save changes to all of the Layout tabs.

Now you can display a formatted page view by clicking

- Print Preview, Print to your printer, or Print to a disk file (Text, RTF, or HTML)
- Click the Save button. A dialog appears for you to name the file. Select the file type, name and place the file, and click Save.



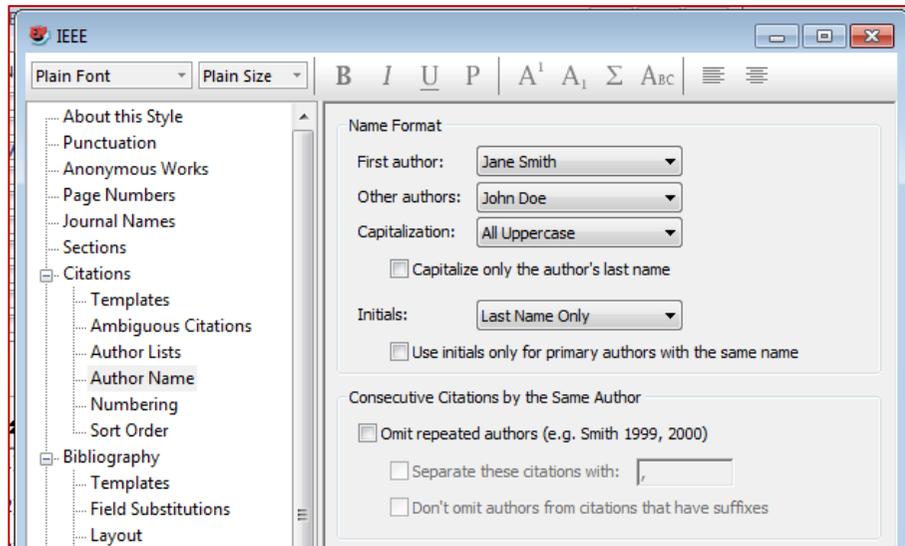
(8) Modify an Output Style

To find and modify a style:

- From the Edit menu, select Output Styles, and then select Open Style Manager.
- Change the setting in the information panel from Style Info to Style Preview.
- Scroll through the list of available styles to see if you can find one that is similar to what you need.
- Once you have found a similar style, select it, and click the Edit button. The Style window opens.

WALKTHROUGH D

- From the File menu, select “Save”, give this copy of the style a new name that corresponds to the name of the journal you want to use it for, and click Save. This will also keep the original style unchanged, in the event that you need to use it later.
- Make some changes in the style

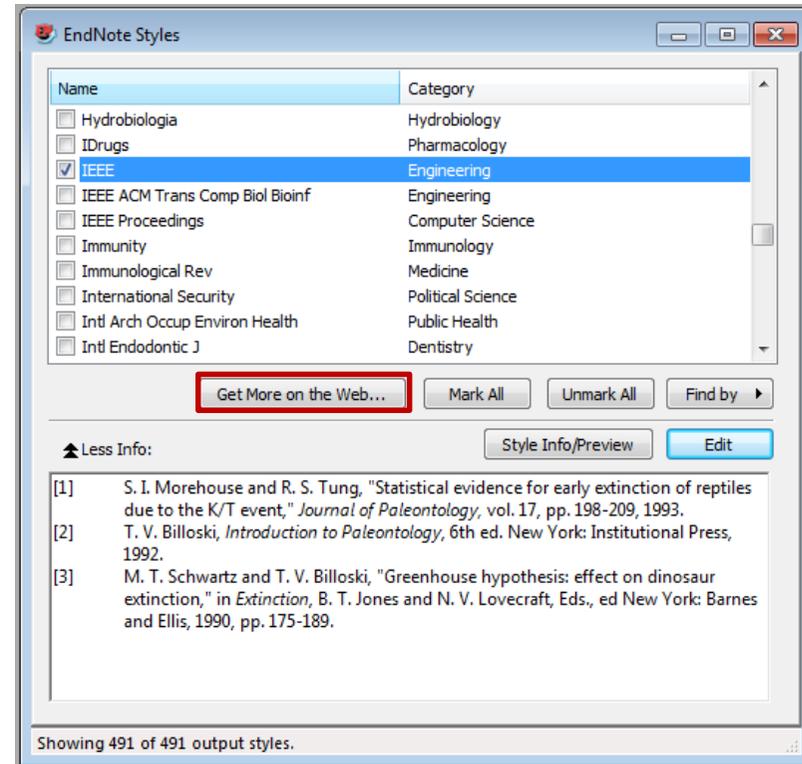


- Once the new copy of the style has been saved, it will be added to your style menus.

(9) Add an additional Output Style to EndNote

To download individual output styles:

- Go to Edit, select Output Styles and then “Open Style Manager”.
- Click “Get More on the Web” to start your default browser and go to the appropriate page on the EndNote Web site.

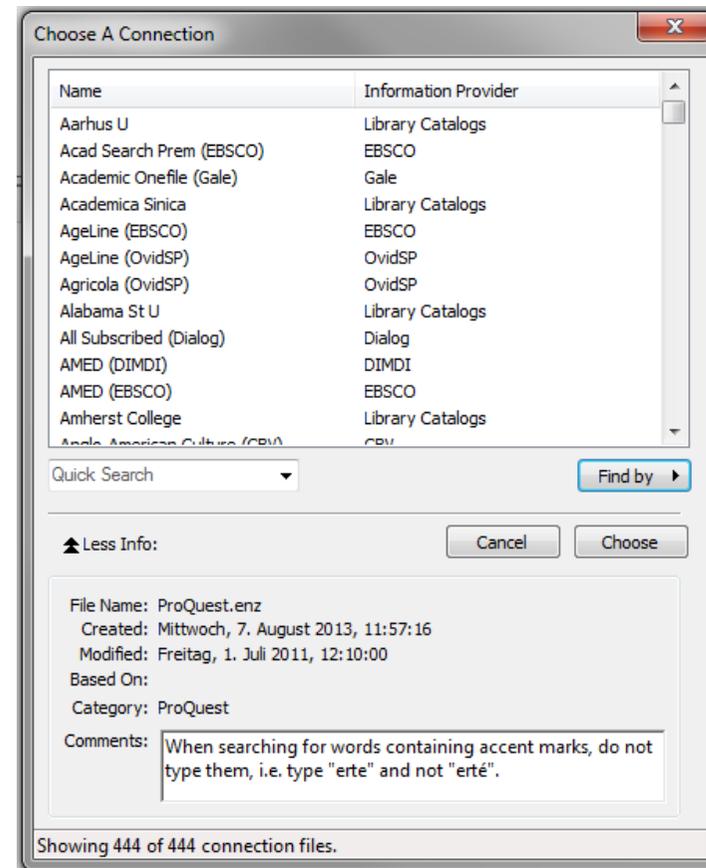
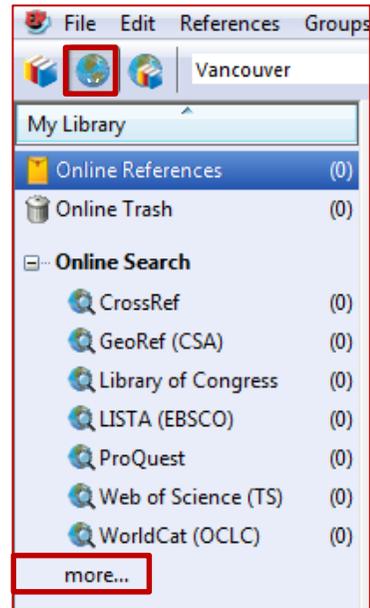


- Click Accept to accept the Terms of Use.
- Search for a journal from your research field, and download it
- Open the file directly with EndNote or copy the downloaded files to your Styles folder, which is typically located at Program Files\EndNote X7\Styles, or to your personal Styles folder
- If EndNote is still open, exit the program and then restart EndNote to read in the added output styles.

(10) Online Search

You can download found references directly into an existing EndNote library using Integrated Library Mode or into a temporary library using Online Search mode.

- On the toolbar, select “Online Search Mode” so that only Online Search groups and commands are available.
- In the “Online Search” group set, click on “more...”
- Browse through the connections and select a connection file of your choice, click on “Choose”

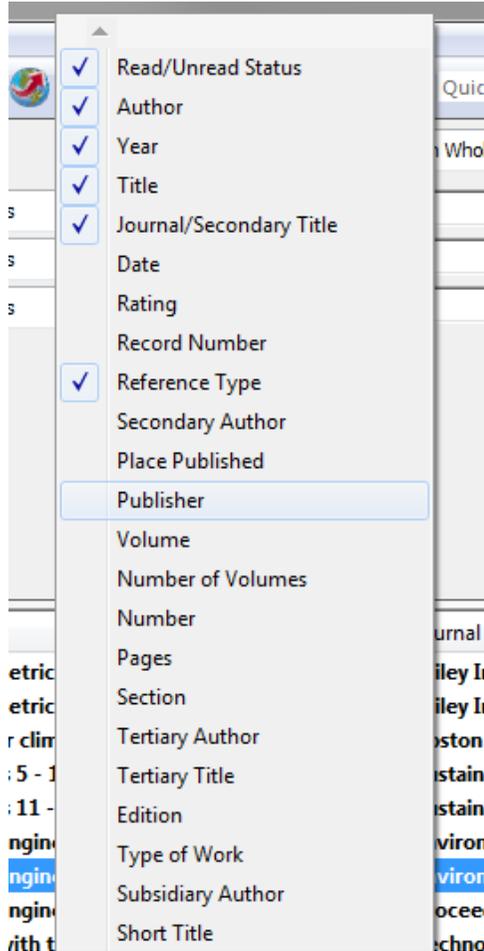


- Enter your search term(s) in the fields on the Search panel.
- Select the appropriate search options.
- Click Search to send the search request to the online database.
- To save references permanently, you must use either the “References > Copy References” to command to copy selected references to a new or existing library or the “Copy to Local Library” icon from the toolbar.

WALKTHROUGH D

(11) Change the columns in the Reference pane

- Right click on any EndNote field heading to display or hide a field.
- For example: to hide the Rating field or to display the Publisher.



- Check and uncheck field name to display or hide.
- To rearrange the order of the field headings, click, hold and drag heading to desired position)

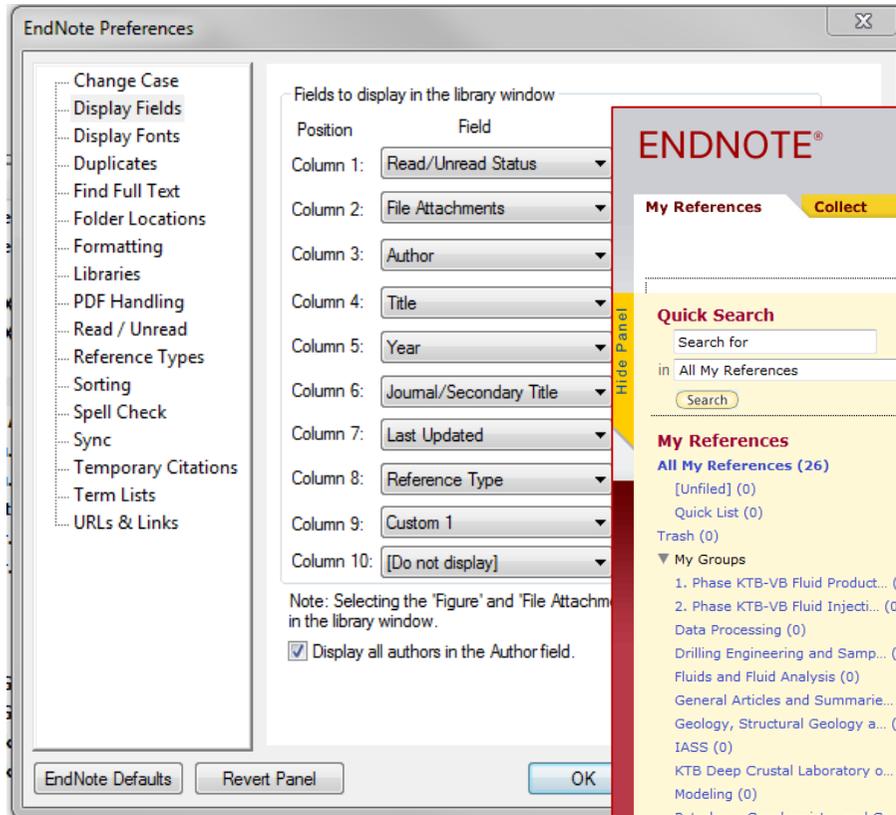
(12) Name and display “Custom fields”

Use the “Display Fields” preferences to choose which fields to display in EndNote’s Library window. You can also add “Custom fields” for your individual purposes.

- Got to Edit, select “Preferences”, and “Display Fields”
- You can change the “Heading” of the default columns and select which one should be displayed in the Reference panel
- Select the field “Custom 1” for “Column 9” and name it “IASS Cluster” for example
- Click OK. The new column will be displayed in the Reference panel



Follow the instructions in the library tutorial: [Working with EndNote Web](#) [Web](#) [PDF, 105 KB]



ENDNOTE®

My References Collect Organize Format Options

Quick Search
Search for _____
in All My References
Search

My References
All My References (26)
[Unfiled] (0)
Quick List (0)
Trash (0)
▼ My Groups
1. Phase KTB-VB Fluid Product... (8)
2. Phase KTB-VB Fluid Injecti... (0)
Data Processing (0)
Drilling Engineering and Samp... (0)
Fluids and Fluid Analysis (0)
General Articles and Summarie... (6)
Geology, Structural Geology a... (0)
IASS (0)
KTB Deep Crustal Laboratory o... (0)
Modeling (0)
Petrology, Geochemistry and G... (0)
Petrophysics, Rock Mechanics ... (0)
Surface Geophysics, Borehole ... (0)
Test Group (12)

Getting Started

COLLECT
Collect references from electronic and traditional sources.

- Search online database
- Create a reference manually
- Import references

ORGANIZE
Organize your references for your research topics and papers.

- Create a new group
- Share a group
- Find duplicate references

FORMAT
Create a formatted bibliography for your paper or cite references while you write.

- Create a formatted bibliography
- Cite While You Write™ Plug-in
- Format a paper

Hide Getting Started Guide

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

You can automatically sync your desktop and web libraries so all the references, attachments and groups in one can be accessed from the other.