Referencing: EndNote - Building your library
How to Use This Course Book

This handbook accompanies the taught sessions for the course. Each section contains a brief overview of a topic for your reference and then one or more exercises.

The Exercises

Exercises are arranged as follows:

- A title and brief overview of the tasks to be carried out
- A numbered set of tasks, together with a brief description of each
- A numbered set of detailed steps that will achieve each task

Some exercises, particularly those within the same section, assume that you have completed earlier exercises. Your lecturer will direct you to the location of files that are needed for the exercises. If you have any problems with the text or the exercises, please ask the lecturer or one of the demonstrators for help.

This book includes plenty of exercise activities – more than can usually be completed during the hands-on sessions of the course. You should select some to try during the course, while the teacher and demonstrator(s) are around to guide you. Later, you may attend Course Clinics at IT Services, where you can continue work on the exercises, with some support from IT teachers. Other exercises are for you to try on your own, as a reminder or an extension of the work done during the course.

Web Addresses for the Exercises

Some of the exercises in this course ask you to visit a certain website. The web addresses for the exercises are given in an article in the Portfolio, so you can go directly to them.

Writing Conventions

A number of conventions are used to help you to be clear about what you need to do in each step of a task.

- In general, the word **press** indicates you need to press a key on the keyboard. **Click, choose** or **select** refer to using the mouse and clicking on items on the screen (unless you have your own favourite way of operating screen features).
- Names of keys on the keyboard, for example the Enter (or Return) key, are shown like this: ENTER.
- Multiple key names linked by a + (for example, CTRL+Z) indicate that the first key should be held down while the remaining keys are pressed; all keys can then be released together.
- **CMD** means hold down the Command key while pressing other key/s; this key may be provided on a Mac keyboard (often marked with an apple or a command symbol 🍎).
- Words and commands typed in by the user are shown like this.
- Labels and titles on the screen are shown like this.
• Drop-down menu options are indicated by the name of the options separated by a vertical bar, for example File| Print. In this example you need to select the option Print from the File menu. To do this, click with the mouse button on the File menu name; move the cursor to Print; when Print is highlighted, click the mouse button again.

• A button to be clicked will look like this.

• The names of software packages are identified like this, and the names of files to be used like this.

Software Used

EndNote X7

Word 2013 (Windows) or Word 2011 (Mac)

Windows or MacOS

Files Used

alpine2.data
rennaissance.data
alpine2.enl
Apelles.pdf
keyboard.jpg
Medici Skeletons Article.pdf
rennaissance.enl

Revision Information

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1 Introduction

This booklet accompanies the course delivered by Oxford University's IT Learning Centre. Although the exercises are clearly explained so that you can work through them yourselves, you will find that it will help if you also attend the taught session where you can get advice from the lecturers, demonstrators and even each other!

If at any time you are not clear about any aspect of the course, please make sure you ask your lecturer or demonstrator for some help. If you are away from the class, you can get help by email from your lecturer or from help@it.ox.ac.uk

1.1. What You Should Already Know

This session is one of a series that cover the important aspects of using EndNote to build a library of references, and cite them in your own documents.

We will assume that you have some knowledge of EndNote, which may be gained via the course Referencing: Up & Running With EndNote, and that you are familiar with entering details of a reference (book, journal article or other item) into a library, collecting references from on-line databases using EndNote’s own Online Search tool and citing references in a Word document.

The computer network in our teaching rooms may differ slightly from that which you are used to in your College or Department; if you are confused by the differences, ask for help from the lecturer or demonstrators.

1.2. What You Will Learn

This course will help you learn to use EndNote to work on a library of references. It is a single session, covering time-saving techniques and automations, and provides tasks for hands-on practice.

In this session we will cover the following topics:

- Researching at databases on-line
- Downloading (importing) references on-line
- Attaching and managing PDFs and full text of papers
- Library housekeeping
- Customising EndNote - displays, sorting etc.
- Syncing with your EndNote library online (EndNote Online)
- EndNote on the move

In these notes, topics marked Optional are additional material which may not necessarily be covered by your lecturer in the taught course. Depending on the work you need to use EndNote for, you may find some of these extra topics helpful. For further information on these, consult EndNote’s Help.

Related EndNote courses, should you be interested, are given in Part 11.2.

Getting to grips with a package as sophisticated and powerful as EndNote can be time-consuming, so allow yourself plenty of time for practice. To increase your understanding of EndNote, make use of the Help facilities available within EndNote.
1.3. Versions of EndNote

These notes deal with EndNote X7. Having worked through these notes, you should also be able to adapt to earlier versions (for example, EndNote X6), and also to later releases, since most of the basic principles hold true regardless of the version of the software.

EndNote for Mac is very similar to EndNote for Windows. Where the actions to follow are very similar in the two versions, we give screenshots or steps using EndNote for Windows. Where there are significant differences, we describe both versions.

1.4. Versions of Word

In this course book, we give screenshots using Word 2013, but the commands and steps are very similar for Word 2011 for Mac.

If you have previously used another version of Office for Mac, you may find Office 2011 looks rather unfamiliar. However, most of the Word commands you will need for this course will be found on the File menu, and you should be able to adapt your other experience to this version of Word.

1.5. Keyboard Methods for Using Word

For anyone who prefers not to use a mouse to control software, or who finds a keyboard method more convenient, it is possible to control Office 2013 applications without using a mouse. Pressing ALT once displays a black box with a letter or character next to each visible item on the ribbon and title bar (shown in Figure 1).

![Figure 1 Keystrokes to Control Ribbon Tabs and Title Bar (Press ALT to show these)](image)

After you have typed one of the letters/characters shown, the relevant ribbon tab or detail appears, with further letters/characters for operating the buttons and controls (shown in Figure 2).
Further Keystrokes to Control Buttons  
(press ALT+P to show these on the Page Layout tab of the Ribbon)

The elements of a dialog can be controlled, as usual with Windows applications, by using TAB to navigate between items or typing the underlined character shown beside an item.

1.6. Where Can I Get a Copy?

If you have a copy of EndNote, then you should find it among the All Programs on a Windows computer, or among the Applications if you are using a Mac. If you are unable to find it on your computer, it may not have been installed and you should talk to your IT support contact (or the IT Services Help Centre).

If you are a member of Oxford University, you can purchase a copy of EndNote from the IT Services Online Shop. Read about obtaining the EndNote software at a discount in the ITLC Portfolio http://portfolio.it.ox.ac.uk.
2 Reminder: Working With *EndNote*

2.1. First: Collecting References in a Library

We will suppose that you have already started building your library database, and probably added a few references. This may have been done manually (by typing authors’ names, titles, years etc.) or by using *EndNote*’s built-in Online Search tool to search on-line databases and download selected references. These topics are covered in an earlier IT Learning Centre course (see Part 11.1 below).

In this course we will go on to consider how to visit dedicated websites for the online databases, and search for useful references, then download them directly into the library.

Figure 3 Building a Library of References from Various Sources

2.2. Second: Inserting Citations in a Document

Once you start to author your own original text, perhaps writing papers or a thesis, you will need to mention or cite works from the library list. *EndNote* has an add-in for *Microsoft Word* which helps you to insert field codes into a document, each having a live link to a specified reference in the library (Figure 4).
2.3. Third: Output Style

The publisher or department to whom the work will be submitted may specify the required format for the citations. This may cover what fields to cite (how many author names, year or reference number etc.) or the punctuation (e.g. comma separators, brackets around) and font formatting (underlining or italics). They may also cover the layout and specifics of the bibliography (Figure 5).

With EndNote, all these factors are controlled by the choice of output style. A previous IT Learning Centre course discussed applying one of the many pre-designed output styles which are included with EndNote. A later course discusses how to customise or create your own output style.

For this reason, references are assembled in the library in an unformatted state: the library should contain raw details, and any questions of appearance and formatting should be left until the word-processing stage.
Finally: Bibliography

When *EndNote* formats the citations within the text of the *Word* document, it also builds a bibliography. This is typically a list of all the works cited in the present document, with more detail than can conveniently be inserted among the text. The layout, sort order and format of the bibliography are again determined by the output style chosen (Figure 6).

*EndNote* builds the bibliography at the end of the document.

---

**Figure 5 Output Style Controls the Format of Citations**

**Figure 6 Bibliography is Built Automatically**
3 Researching at Online Databases - Direct Import

Exercise 1: Getting started

First look at this exercise (page 52).

3.1. Researching On the Internet

Many of the well-established research databases and resources can be visited using the internet. Many have their own dedicated websites, with search tools which you can use to examine their catalogues. Here you can collect references to scholarly articles, and download them to your EndNote library.

Each website is different, as they are under the control of the individual library or institution. Some are elegantly designed and easy to use; others take more time to get used to.

You may know the URL (web address) of the website that interests you, so you can type that directly in your browser. Otherwise, you might use pointers from more general portal sites. Oxford University’s OxLIP+, found from the University’s front page, has a title search which is a good place to start (shown in Figure 7).

![Figure 7 Using the OxLIP+ Portal to Find On-Line Databases](image)

3.2. Note: Which Browser?

The method of downloading described here may not work properly from some websites if using Safari, and for others if using Internet Explorer. The EndNote company recommends using Firefox for browsing to research databases, if downloading directly into an EndNote library. Firefox is available to use on a Mac or Windows.
3.3. Downloading References Online

Some database websites offer a specialist tool for downloading selected references directly into your EndNote library. This makes the whole process of researching and collecting leads to useful published work very much easier.

Examples of research sites which provide an immediate download into EndNote include the Web of Science family, ProQuest and EmBase (at the time of writing).

EndNote Help gives a list of providers which offer Direct Export, with instructions on any special filters etc. that are needed – in the Help Index, search for Direct Export Providers.

The Web of Science website provides a good example of this process.

3.4. Searching Databases

Each individual website has its own design and layout. Here you search for the references, papers, books etc. which interest you. The procedure for using the search tools may be self-evident, or there may be some Help to guide you.

At the Web of Knowledge, the simplest search is to enter one or more keywords in the Search boxes, limit the date range, then click Search. More detailed searches, specifying a range of years, author names or title text, are also possible.

![Searching at the Web of Knowledge Website](Capture.png)

Figure 8 Searching at the Web of Knowledge Website

3.5. Selecting Items of Interest

The online database presents a list of all the items it holds which match your criteria. Only some of these will be of interest to you, so the next step is to examine the list and mark those which you want to download - in this case by putting a tick in each checkbox (Figure 9).
Selecting Some of the References Found

Most research websites offer a way of collecting the references that you have marked into a shortlist (this may be called the Clipboard, My eShelf, Marked List, Marked Items, Research List, Basket etc.).

If you are not sure about how this is done at a particular website, read any Help that may be provided on the site (again, the quality and helpfulness of this does vary), or talk to your subject librarian who may have experience of the site.

In the case of the Web of Knowledge, the marked references are added into a short list by clicking . Once you have collected all the references needed, clicking near the top of the window will display the shortlist.

Exercise 2: Online researching

Now look at this exercise (page 53).

3.6. Outputting Data From a Database

The command to output the selected information from the shortlist has different names in different websites, so you may need to explore, or to read any Help that is provided.
For example, in the **Marked List** part of the Web of Science, you first select the records to be sent, then the fields to include in the output:

![Marked List](image)

Figure 10 **Outputting Data from Web of Knowledge**

It may be useful to spend a moment selecting the most useful fields at the option similar to **Step 2** in Figure 10. More fields will take longer to download, but might conveniently provide useful information for your library.

**Step 3** is for specifying where the selected data is to be sent.

**Aside:** Do not be distracted by an option such as **Save to EndNote online**. Some websites may offer a command like this, which downloads the references to an *EndNote Online* or *EndNote Web* library. Part 8 below discusses the *EndNote Online* library.

When ready, you need a command or button similar to **Save to EndNote desktop**. When you click this, the web browser’s Export plug-in inspects your computer to confirm that you have *EndNote* software installed. If so, the next dialog is where you confirm the filename and location of the library into which you wish the data to be downloaded.

**Note:** if your website offers you various export options, but *EndNote* is not mentioned, see if RIS is there – this is likely to be successful.

### 3.7. Examining the Imported Data in *EndNote*

The data is downloaded directly into your *EndNote* library.
The set of references which have just been downloaded are initially displayed in a temporary group, the **Imported References**. Any unwanted references can be deleted now, and each reference should be inspected to check that the data is suitable.

You might choose to add your own notes or to re-organise the recently-downloaded references now, before they become mixed into the main data set. For example, add your own keywords to each reference.

When ready, use the **All References** group to see the recently-imported references in the context of your library.

**Exercise 3: Online researching - direct download**

Now look at this exercise (page 53).

**3.8. Import Filter**

When downloading references from certain websites, you may be asked to choose an import filter.

An import filter is a computer file that specifies the pattern for the data: which fields are included and in what order, the punctuation between them etc. **EndNote** can successfully import data in a wide variety of patterns, but you may need to specify which is being used. This is done by choosing the import filter which matches the source of your data.

A large collection of import filter files are supplied with **EndNote**, so there is a good chance that one of these will suit your data source. You may have been told which one to use. Or it may be given in the Help for the website (search the database’s Help for “**EndNote**”). Otherwise you must look through the list of import filters provided, and experiment until you find one that works for your data.

An example of this behaviour is the **PubMed** site (as revised summer 2012). Just before the references are downloaded into the **EndNote** library, a dialog may ask which import filter is to be used. For example, a **PubMed** import filter is available from the set provided with **EndNote**.
Exercise 4: Downloading references from PubMed (Optional)

Now look at this exercise (page 56).

3.9. Downloading from Google Scholar

References can be downloaded from Google Scholar. However, you first need to configure Google Scholar to send references to EndNote. Then you will be able to send references to EndNote by clicking on the Import into EndNote link.

This is described in an article in the ITLC Portfolio (see part 11.1 below).

Google Scholar is limited as it only downloads 1 reference at a time, with just a few fields. Also beware that the search is not limited to peer-reviewed articles.

Note on Google Scholar and WebLearn: there used to be a link for importing a reference from Google Scholar into WebLearn. This is no longer available, because Google have removed the interface with Sakai.

3.10. Downloading From Oxford’s SOLO

Oxford University’s SOLO is a search and discovery tool for the Oxford Libraries’ vast collections of resources, at www.bodleian.ox.ac.uk

References can be transferred from SOLO’s e-Shelf directly into your EndNote library.

The references appear in your EndNote library in a temporary group called Imported References. Here you can confirm the contents of the references, and decide whether to allow any of them to stay in your library.

Exercise 5: Downloading references from SOLO (Optional)

Now look at this exercise (page 58).
3.11. Downloading from Oxford’s OxLIP+ CrossSearch

The CrossSearch tab of Oxford University’s OxLIP+ can also export references to an EndNote library. Once you have collected some references in My Research, you can select some and Save/Email them to your EndNote library.

Exercise 6: Downloading references from OxLIP+ CrossSearch (Optional)

Now look at this exercise (page 59).

Exercise 7: More searching and downloading (Optional)

Now look at this exercise (page 61).
4 Researching Online - 2-Stage Import

Some websites which offer useful resources do not have a dedicated tool that downloads references directly into an EndNote library. In this case, the details must first be exported to a text file which you save somewhere convenient on your computer, and the data is then imported to your EndNote library.

4.1. Searching for References at Your Chosen Website

Each website works in a different way: in each case you must search the database for promising references, then mark or select those which interest you.

4.2. Exporting Data - Using a Special Format

Many sites are able to export the selected reference details to a separate text file. If you are not sure about how this is done at a particular website, read any Help that may be provided on the site (again, the quality and helpfulness of this does vary), or talk to your subject librarian who may have experience of the site.

The website can send the selected references, in the selected format, as a separate text file which is saved on your computer. A convenient location for this temporary file might be on your Desktop – do make a note of the filename and location that are assigned, since you will need to find it later.

4.3. Importing Using an Import Filter

Then the contents of the text file must be imported into EndNote.

Displays the Import File dialog. Here you specify the text file (filename and location). As shown in Figure 14, you must also specify an Import Option. This “option” is the set of rules needed for EndNote to interpret the data from the text file, and you must choose the appropriate import filter to suit the format in which your website exported its data.

![Image of Import File dialog]

Figure 14 Importing a Text File into EndNote

EndNote is provided with over 600 ready-made import filters. It is likely that one of these will match the website you have exported from, and you simply have to experiment to discover which one will suit. For example, the Cochrane Library exports references to a text file, and an import filter is available in EndNote’s standard set of filters.
The name of the filter may be enough to guide you. Otherwise, colleagues or a specialist librarian familiar with the website you are using may suggest which one to use. The Help or FAQ’s at the database website or at EndNote’s website may specify the correct file format and import filter to use.

4.4. Comments: Choosing On-line Resources

Choosing an Online Resource

The choice of databases and library catalogues will depend very much on your own field of work. Many specialise in one area of academic study, so good resources for recommendations will be your librarian or specialist subject librarian, as well as your academic supervisor and colleagues of course.

Beware that sites are variable in coverage, accuracy, completeness and the number of fields they provide. You may prefer to restrict your searches to peer-reviewed journals (Google Scholar, for example, while being easy to use is not limited to peer-reviewed articles).

Authorisation

You may need credentials to visit some sites, such as an account name and password. Your department or librarian can advise on your entitlement while you are a member of Oxford University. If you are using a computer which is connected to the Oxford network, some credentials will be supplied transparently and you may not be aware that this is happening.

If however your computer is not connected to the Oxford network, you may need to authenticate your visit. Alternatively, install the special software known as Cisco VPN - once this is installed and connected, your computer behaves as if it had Oxford credentials.

Read about VPN at the IT Services website http://help.it.ox.ac.uk/network/vpn/index.

Broadening Your Researches

Your researches should usually include visiting several online resources, and not be restricted to one database.

OxLIP+ is a good portal for finding well-established resources; find it at www.bodleian.ox.ac.uk or navigate from the Oxford University home page. The Subject tab provides easy-to-use links to many well-known sites.
4.5. Using References Typed in a *Word* Bibliography?

*EndNote* cannot easily read a word-processed list, such as a bibliography that has already been typed in a *Word* document. It is usually better to capture the references afresh from a relevant online database, using *EndNote*’s built-in Online Search tool or one of the methods described above. In that case, the data collected is likely to include many more fields than the minimum given in a bibliography list.

Given rather sparse reference details, *EndNote* may be able to find more details online. For the selected reference/s, **References| Find Reference Updates** will search online at CrossRef, PubMed and Web Of Science. If it can match the author name/s, title and year of the paper, it offers further field details which you can choose to incorporate into the reference.

If the work is within the area covered by *PubMed*, it may be possible to use the informal tool *HubMed Citation Finder*[^1], where you **Copy/Paste** text from a bibliography. *HubMed* attempts to parse the text and match it from *PubMed*’s catalogue.

[^1]: [http://www.hubmed.org/citation.htm](http://www.hubmed.org/citation.htm)
5 Attaching PDFs and Other Data to an *EndNote* Reference

An *EndNote* reference is a summary of a scholarly article, with bibliographic details and further, richer data to support research. It is possible to attach other files or further data to each reference.

The most popular use of this is to attach a **PDF** file which has the full text of a journal article.

5.1. Figures

The field labelled **Figure** can hold photos or other image files. ![Image button] is the button for attaching an image file – you must specify a location where the image file has previously been saved. By default, a copy of the image file is copied into your *EndNote* library. The figures appear as thumbnails in the **Figure** field.

5.2. URL or DOI Field

In the field labelled **URL**, you can enter (by typing or by **Copy/Paste**) a web address or URL of any online information relevant to the reference.

A typical use is to include the web address where the full text of the paper being summarised can be found. This becomes a link which you can click at a later date, to visit that web location and read the paper. This is the most space-efficient way of recording the full text of a document, because the text is stored at a remote library.

Some libraries and catalogues provide the location information for full text papers in the form of a **DOI** (Digital Object Identifier). This uniquely identifies the place where a document can be found online, in a form which you can expect to persist over time: this is more reliable than an ordinary URL address, because those are liable to be changed or moved by their owners without notice. So if DOI information is available, it would be good practice to record this in the **DOI** field.

References collected from online databases commonly include the URL and/or DOI where the full text of a paper is to be found, saving you time in searching for it.
Exercise 8: Including further information with a reference

5.3. Attaching a File That Has Been Saved Locally

It may be convenient to store a related file in the EndNote library, associated with an individual reference. This might be a document or PDF file with the full text of a paper, or a datasheet or other related information. This is known as an attached file.

Although this method is often used for the full text of a paper in PDF form, files of any type can be attached — such as a Word document, Excel spreadsheet or specialist data format. Multiple files can be attached to the same reference.

The full text document may have been downloaded from an earlier visit to an online database or some other source, and saved on your computer’s local drive or network. Now you attach it to a relevant reference by using References|File Attachments|Attach File or and browsing to the place where the file has been saved.
The checkbox at the bottom of the Select a file dialog is used to choose whether to make a copy of the document in EndNote’s own .data folder or just to link to the original document in its present location.

Once a file has been attached to a reference, a paperclip symbol appears in the Attachments column in the library list (by default) and the filename appears in the Attachments field in that reference.

An alternative method of attaching a file or PDF is to drag the filename from a Windows Explorer window or Finder window and drop it onto the relevant EndNote reference.

The attached file can be re-opened by using References| File Attachments| Open File.

If, at some later date, you need to save the PDF document separately from the EndNote library – perhaps you are passing a copy of the paper to a colleague – then right-click the File Attachments field in the reference and choose Save As.

5.4. Controlling the Renaming of PDFs

EndNote may rename a PDF file, as it imports it. This can be controlled by setting a preference: choose Edit| Preferences and select the PDF handling category.
5.5. Viewing PDF of a Paper Within *EndNote*

*EndNote* has a PDF viewer built in. Tabs at the top of the Reference panel enable you to switch between seeing details of the selected reference, a preview of a bibliographic entry and the PDF if attached.

Buttons are provided at the top of the Preview panel for paging through the PDF, zooming, rotating and printing.

![Toolbar for Viewing PDFs in EndNote](image)

Figure 19 **Toolbar for Viewing PDFs in EndNote**

You can highlight portions of text or attach sticky notes with your own comments. These are saved with the PDF file.

5.6. Viewing a PDF Using *Adobe* Software (or Similar)

If *Adobe Reader*, *Adobe Acrobat* or similar software is installed on your computer, it may be possible to view the PDF directly from *EndNote* using the reader.

Right-clicking on the PDF filename tab at the top of the Reference panel offers a command similar to **Open with Adobe Reader**. This opens the copy of the PDF that is saved in the *EndNote* library. Now you have all the tools from your
familiar reader software, and your annotations, highlights etc are all saved with the PDF document.

5.7. Searching a Whole Reference Including PDF

The familiar Search tool can be used to look for a term or phrase in any field or inside an attached PDF paper. In the Search panel, choose to search in the attached PDF, and use the searching logic as usual. The search can look through your personal sticky notes if required.

![EndNote Search Panel to Search Inside a PDF](image)

Figure 20 Using EndNote Search Panel to Search Inside a PDF

Exercise 9: Working with an attached PDF

Now look at this exercise (page 63).

5.8. Obtaining the Full Text of an Article

The PDF of a paper may arrive when you collect the reference online – some databases offer this option. However, if you have not got the full text PDF, there are a number of tools that may help.

EndNote may be able to locate the full text of a paper automatically, by searching for its DOI in certain online services such as OpenURL or CrossRef.

With the required reference selected, starts this process. EndNote connects to one of the online servers which offer this service, and if the text of the paper can be found, it is downloaded to your computer. A copy of the downloaded paper is saved in EndNote’s .data folder, and a relative link is attached to the selected reference in your EndNote library.

If the file cannot be found or cannot be downloaded – perhaps because you need to give a password or make a payment before downloading – the website address may be recorded in the URL field.
The references being sought are listed temporarily in a group called **Find Full Text** (this group is erased when you close the library).

![Find Full Text](image)

**Figure 21 Messages While Full Texts Are Being Sought**

**Note on the availability of full texts**

The resources that can be searched depends on your (or your institution’s) subscriptions and entitlements. This is discussed in *EndNote’s Help on Finding Full Text*.

The search is usually more successful with recent work.

If the full text article is freely available, or if Oxford University has a subscription to a relevant service, *EndNote* tries to download the paper. This process may succeed with no special settings. However, *EndNote’s Preferences* include settings for **Find Full Text**, and using the Oxford University settings may improve your success rate. If seeking medicine-related articles, turn on **PubMed LinkOut**.

For more information on Oxford’s subscription to OpenURL and others, see the article in the ITLC Portfolio [http://portfolio.it.ox.ac.uk](http://portfolio.it.ox.ac.uk). Here you may be asked for your Oxford username and password (this is your SSO username, typically of the form `abcd1234`).

**Exercise 10: Finding the full text PDFs**

Now look at this exercise (page 65).

**5.9. Create a New Reference By Extracting From a PDF**

If you already have the PDF of a paper, *EndNote* may be able to create a new reference from it.

This is done using the Import command ![PDF](image) (choosing **PDF** in the Import Options). *EndNote* mines the DOI from the paper and looks that up in an online service called CrossRef2. *EndNote* downloads the basic bibliographic data such as title, author, volume, issue, page and year. It creates a new reference in the **EndNote** library, then attaches a copy of the PDF file.

There is an option in the **Import** dialog, for how *EndNote* should handle duplicates: if there is already a reference in your library for the document being imported, should *EndNote* create an additional reference or not, or add the additional reference to a separate library for later consideration?

If no DOI is available for a paper, *EndNote* creates a simple new reference with just the minimum field data available, and attaches the PDF file. You may then

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2 [www.CrossRef.org](http://www.CrossRef.org)
decide to seek the remaining information some other way and Copy/Paste it into the reference, or use Find Reference Updates.

This method is likely to work for most journal articles, conference proceedings, conference papers, and reports; it is more likely to succeed for recently-created items. Note that this method only works for PDFs that the publisher created - if you have simply scanned a paper document to make your own PDF, then EndNote can’t mine the bibliographic details.

5.10. Importing a Batch of PDFs

If you have a collection of several PDFs to import, it may be efficient to put the documents in a folder and do a similar process starting File| Import| Folder. A “watch folder” or auto import folder can be set up: this is a Windows Explorer folder or a Finder folder, where you place any PDFs that you collect during your research work. Next time EndNote starts, it will import those PDFs into the library, creating suitable references automatically.

If the auto import folder has subfolders, any PDFs in the subfolders will not be imported.

The auto importing behaviour is set up in the PDF Handling category of the EndNote Preferences.

![Setting Auto Importing for PDFs](image)

5.11. Capture from a paper online using EndNote Online

EndNote Online can construct a reference from a paper you are reading online. Read more about using EndNote Online in Part 8 below.
Exercise 11: Creating a reference from a PDF

Now look at this exercise (page 66).
6 Library Housekeeping

6.1. Backup

As your library grows, it becomes a valuable resource. So it is essential to have a regular discipline of frequently copying and keeping backup copies of the EndNote library files.

One easy way to make a copy is to use the File| Save a Copy command. Here you can specify a filename and location for the copied library.

It is worth keeping copies of the library files on a separate medium, which may be a CD or extra memory stick for example, then keeping them safely in a different location in case of a computer failure, theft or other disaster.

If you have access to a network drive which is part of the Oxford University network, this is an excellent place to keep copies of your research library because it is usually backed up automatically (check this with your departmental staff).

EndNote can create a compressed copy of a library, in a special .enlx format which takes up less space. This is suitable to send to a colleague who needs to use your reference information. They open the library using the usual open command - their copy of EndNote will decompress the .enlx file to make a usable library.

Do not be tempted to store your library on a 3rd-party storage service which encrypts the files, Dropbox and similar services may damage the library so that it cannot be successfully de-encrypted.

6.2. Damaged Library

Beware moving an EndNote library between computers that have different versions of EndNote software.

If the library file becomes corrupt, a message displays when you attempt to open it. A Recover Library option may be offered. If this is not successful, you could try creating a new empty library, then transferring your references using Copy/Paste or Import.

Exercise 12: Backup copies of a library

Now look at this exercise (page 67).

6.3. Duplicate References

Finding Duplicates

It is likely that as you collect references from various sources there will be some duplicates in your library i.e. two or more references in your library which describe the same journal article or book etc. It is important to find and remove any duplicates before they are used in your own written work.

The command References|Find Duplicates will help here. It finds any pairs (or triplets or more) of references which seem to match, and presents them so that you can decide how to treat them. They are shown in a temporary Find Duplicates dialog.

EndNote usually considers two references to be duplicates if the author, year, title and reference type all match.
Now you must consider each pair of references carefully. They may be different but similar references, perhaps if an author has written prolifically on a subject. In this case you can add or edit text in each reference to clarify the differences, then click Skip to move on, leaving both references intact.

If you decide that one pair are indeed duplicates, you must choose which one of the pair to keep, and delete the other. It is likely that if they came from different sources (on-line catalogues etc.) one will contain richer information than another, depending on the cataloguer. In this dialog, you can Copy/Paste information from one reference to the other, thus collecting the best of both. Also notice which one has been updated more recently. You can scroll through each reference, to decide which to Keep (the one you do not keep will be deleted).

A rule of thumb is to keep the older instance of the reference, and delete the one that arrived more recently in your library.

Another consideration when pruning duplicate references is the possibility that one or the other has already been cited in your own written work. In this case, you should usually delete the one that you have never cited. If you decide to delete a reference that has been cited, you will need to go through your written work re-inserting citations, using the surviving duplicate reference.

**Adjusting the Criteria for Duplicates**

By default, two references are considered to be duplicates if the author, year, title and reference type all match. These criteria can be changed.

In the **EndNote Preferences** dialog, there is a **Duplicates** category, where these criteria can be adjusted.
Changing the Criteria for Duplicate References

For example, some online databases have different conventions for recording multiple author names, so some duplicates might be overlooked if using the default criteria. Similarly, different catalogues may abbreviate journal names differently, so again some references which are actually duplicates might be missed. A cautious approach would be to re-run the search for duplicates with several different sets of criteria.

Exercise 13: Finding and removing duplicates

Now look at this exercise (page 68).
6.4. Documenting Your Searches

It is good practice to annotate each reference in a library, indicating the online source where it was found or other useful information.

![Append Text to a Field](image)

Figure 25 Appending Text to a Field

Note that this command, like those described in the next few sections, applies to all visible references. So if you wish to make a change to a set of references, you must first carry out a suitable search to display the relevant dataset.

With the relevant reference/s showing, the command for this is **Tools|Change/Move/Copy Fields**. On the **Change Fields** tab, a phrase or text can be typed which will be added to any specified field.

With a little care, a tab or a new line “return” can be included in the appended text. These are found using **Insert Special**. For example, it is usual to place each keyword on a separate line, so if you append a new keyword to a group of references using this function you will want to prefix it with a “return”.

6.5. Rearranging Data Between Fields

If some data appears in the wrong fields, use the **Move/Copy Fields** tab of **Tools|Change/Move/Copy Fields**. This commonly happens with data downloaded from online sources: the cataloguer may have included some details in one field, differing from your practice.
The chosen move will be carried out for all references that are showing, so it is important to use a search or similar step to display only those references which are to be changed.

6.6. Capitalisation (Upper- or lower-case)

Practice varies between fields of academic study, over how to capitalise titles of papers, books etc. References that you collect from a variety of online sources are likely to have inconsistently capitalised titles.

There is an option to change this, in the Change Fields tab of the Change/Move/Copy Fields dialog (found via the Tools menu).
Of course the output style may over-ride the case of a title in the citations and/or bibliography in individual documents.

6.7. Correcting Data

If the same text needs to be changed in many references, the global text edit function at Edit|Find and Replace is useful. This might arise if your library includes a mixture of spelling conventions, and you now wish to make them consistent. This is similar to a Find and Replace command in a word-processor.

This command exchanges one text or phrase for another, every time it is found in a particular field. Some care is needed to choose which fields should be treated in this way. For example, in Figure 28 one spelling variant is being exchanged for another, to ensure that a consistent set of keywords is used throughout the library. However, it may not be appropriate to “correct” the spelling used in titles of papers or books, since that is what the authors wrote.

6.8. Finding Gaps

If you suspect that some references have gaps - fields with no data entered - these can be found using a search which sets nothing in the field in question and uses the operator Is (do not use Contains for this).
6.9. Find Reference Updates

*EndNote* can search online for updated field data for your references. The command is **References|Find Reference Updates**.

*EndNote* searches a number of academic databases using the DOI, or if none is given it attempts to match author name, year of publication, and journal title. When it finds a possible match for the paper or reference, it displays the new and old versions of the reference so you can choose which updates or corrections you want.

![Reviewing Updates for a Reference](image)

**Figure 30** Reviewing Updates for a Reference

**Exercise 14: Finding and fixing gaps in data**

Now look at this exercise (page 69).
7 Customising *EndNote* - Displays, Sorting etc.

There are a number of aspects of *EndNote* which can be customised, for convenience or to suit a special way of working. The Preference settings discussed here are saved on the particular computer. If you move to use another computer, you will usually need to re-set these preferences or else get used to using the default settings again.

### 7.1. Fields Displayed

By default, the library list shows columns for Author, Year, Title, Journal etc. This can be changed, if you prefer to see other fields displayed, or fields in a different order.

Columns can be rearranged by dragging the column headings.

This is one of the many useful **Preferences** that can be set (with *Windows* this is found on the *Edit* menu; with a Mac it is found on the *EndNote* menu). The dialog has a list of categories at the left-hand side. Choose a category to see its options displayed in the dialog.

![Choosing Which Fields are Displayed](image.png)

There is a useful checkbox here, which will **Display all authors in the Author field**.

For each column, you can choose the field that is to be displayed (up to maximum 10 fields). For example, it may be helpful to see each reference’s Record Number displayed. This is the serial number which *EndNote* uses to trace the correct reference when it is cited in a document, and it gives a good indication of the order in which records were added to the library.

An alternative Heading can be typed in the right-hand column, if preferred.
Note that it is not possible, or even meaningful, to change an individual record number once it has been assigned to a reference. Once a reference is deleted its record number is not re-assigned to another reference, so it is quite usual to have gaps in the number sequence.

**Exercise 15: Changing the fields displayed (Optional)**

Now look at this exercise (page 70).

### 7.2. Read/ Unread behaviour

By default, the leftmost column in the references list is a Read/Unread flag which appears in white ☐ or grey ☐.

The default behaviour is that a reference that has not been visited is marked grey and the text is bold; once you have viewed the reference, for example in a separate Reference window, it is automatically marked white.

However, many users prefer a reference to be marked Unread until they actively decide to mark it as Read – for example once they have read the paper or book itself.

This behaviour is customisable in the Preferences. If all the checkboxes are cleared, a reference is only marked as Read when you choose to change its status by clicking ☐.

![Controlling the Behaviour of the Read/Unread Flag](Image)

**Figure 32 Controlling the Behaviour of the Read/Unread Flag**

### 7.3. Alternative Fonts

References and details can be recorded using a combination of languages, of course. *EndNote* can display text in a range of fonts. If there are special characters and diacritics, a Unicode font would usually be needed. Arial Unicode is a popular font, which supports a wide range of characters.
Among the Preferences (from the Edit or EndNote menu), in the Display Fonts category, suitable fonts should be chosen which can display the language/s needed.

7.4. Spell-Checker Languages

Changing the Main Dictionary Language (Windows)

If most of your work is written in another language instead of English, you may want to change the main dictionary language. This can be set in the Spellcheck part of EndNote’s Preferences, using Options...
Setting Another Dictionary for Spell Checking

**Spell-checking Using Multiple Dictionaries (Windows)**

*EndNote* can check spelling using a number of dictionaries simultaneously. In the **Spell Check** category of the **Preferences**, there is a dialog for specifying further dictionaries to be applied.
AddFile is used to add more dictionary files to the Files list in this dialog. A number of dictionaries are supplied with EndNote, including some specialised ones such as British Medical. The filenames of the dictionaries for various uses are listed in Help under dictionaries.

As shown in Figure 35, it is possible, even quite usual, to have a number of dictionaries set at the same time. This means that a word which appears in any one of those dictionaries will pass as correctly-spelt.

Changing the Main Dictionary Language (Mac)

EndNote checks your spelling using the Mac OS spell checker. So any dictionaries you have set up on your Mac will be used inside EndNote. This may include multiple languages and custom dictionaries.

7.5. Words to Ignore When Sorting

When the library list is sorted alphabetically by Title, small words at the start of the title are ignored for sorting purposes - by default these are the articles the, an and a (as illustrated in Figure 36).

Figure 36 Articles or “Small Words” Are Ignored When Sorting Titles

It may be useful to add more words to this list, especially if you are working in another language. A separate list can be built up, with small words to be ignored at the start of Author names e.g. de 1a or el. This decision will depend on the usual practice in your field of work, for example whether the name von Trapp should be listed among the V’s or the T’s.

This can be set in the Sorting category of the Preferences.
Exercise 16: Changing the way names are sorted (Optional)

Now look at this exercise (page 71).
8 *EndNote Online*

8.1. Using *EndNote Online*

*EndNote Online* is a separate product, from the same company who offer *EndNote*. It is an online tool, so instead of buying software you set up a personal account, and all work is done while connected to the internet. *EndNote Online* is found at www.myendnoteweb.com. See below for more details about *EndNote Online* accounts.

*EndNote Online* can also work in a browser on your mobile device, and there is an *EndNote* app for iPad.

When you have registered and obtained a username and password (available free), you can visit the website and begin to build up a library of references.

It is easy to sync references between an *EndNote Online* library and an *EndNote* library on the desktop, so the two products work together neatly.

*EndNote Online* was previously known as *EndNote Web*, and you will still see the old name sometimes.

8.2. Comparing *EndNote* with *EndNote Online*

An important difference between the *Desktop* and *Online* variants is that with *EndNote Online* your library is held online, “in the cloud”. So there is no library file to save and manage. Provided your computer is connected online to the internet, you can connect to your own library from anywhere and continue work.

This may be an advantage for users who move frequently between computers, provided they can always obtain internet access.

*EndNote on the desktop*’s strength is in its word-processing features. Cite While You Write and Instant Formatting are easy to use and they enable your document to interact smoothly with your library. Although add-ins are available for *EndNote Online* to work with *Word* documents, these are less convenient.

Formatting a document with *EndNote Online* is a different process from that for *EndNote on the desktop*. The document is initially assembled with temporary citations, and when ready these are converted to formatted citations, in a once-only process. In contrast, a document with *EndNote on the desktop* citations has live links to the library, which are updatable and can be re-formatted when necessary.

The two parts of *EndNote* are compared at this site: http://endnote.com/support/faqs/endnote-compare

8.3. Getting Started with *EndNote Online*

Clicking or choosing **Tools|Sync** in a recent copy of *EndNote* takes you to the *EndNote Login* dialog, where you create a new online library.

www.myendnoteweb.com is the URL for visiting *EndNote Online* directly.
The **My References** tab shows all the references you have collected in the online library. Working here is similar to using *EndNote* on the desktop, but with fewer options: you can search or sort the references, or click a title to see a reference in more detail. As an owner of *EndNote* desktop software, you can store an unlimited number of references online, with unlimited space for attachments (PDFs and similar).

References can be organised into groups: you would use the same group names here as in the library on the desktop.

On the **Collect** tab, you can use *EndNote Online* to search for references and add them to the online library – the procedure will be familiar from your use of *EndNote desktop*.

### 8.4. Capture References Using Online Tool

A **Capture** tool can be set up in your web browser, which acquires the details of a reference you may be reading online. A new reference is created and sent either to your *EndNote* desktop library or your *EndNote Online* library.

The **Capture** tool is found on the **Downloads** tab of the EndNote Online website.
EndNote: Building your library

Figure 39 Capturing A Reference While Reading Online

Figure 40 New Reference Can Go to EndNote or Online

**Exercise 17: Creating a library with *EndNote Online***

Now look at this exercise (page 72).
8.5. Sync - Synchronising the Desktop with the Online Library

Starting Sync

Note: this task might take place automatically, after you have created an online library.

Use 🔄 or choose Tools|Sync in EndNote to initiate a sync between your desktop library and online library. EndNote carries out a two-way sync, keeping the most recent version of each reference from both libraries. This creates a (duplicate) copy of the reference in the other library, not an online link.

The first time a library is synced, it may take many minutes, but you can expect it to be quicker in future. It is usual to keep the libraries closely synchronised, so that rather few changes need to be transferred each time. Immediately after syncing, it may be necessary to refresh the browser window, so as to see the references that have recently arrived.

Click Sync Status in the Groups panel in EndNote, for a summary of recent sync operations, with dates.

Scope of the Sync

The Sync process fully synchronises the whole of the two libraries, including all the custom groups.

Trash is a group, so if a reference has been moved to Trash in one library, that move is synced in the other library.

PDFs and other files attached to references are synced. Note this applies only to relative linked PDFs (i.e. those copied and saved in the .data folder); any PDFs located outside the .data folder are not synced.

Conflicts in a Sync

If EndNote finds a reference which has been changed in both locations since the last sync, there is a conflict. There is also a conflict if a reference appears in one group in one library and in another group in the other library.

A list of conflicts is displayed, for you to consider and resolve. For each conflicted reference, you choose which version to keep. You may first Copy/Paste text between versions of the reference, to make a single better reference before deleting the other.

If EndNote cannot resolve which group to put some references into, they appear in the Unfiled group.

Library Window Display Modes

At the left end of the EndNote toolbar are a trio of buttons similar to this: 🔄 🔄 🔄 or 🔄 🔄 🔄. Make sure you have the Integrated Mode selected (try clicking it until it looks depressed). This will give the default behaviour described here. You can read more about window display modes in EndNote’s Help.

Sync was known as Transfer in earlier versions of EndNote; do not mix versions of EndNote.
Exercise 18: Synchronising libraries online and on the desktop

Now look at this exercise (page 73).

8.6. Sync Options

Options for the Sync behaviour are set in the Preferences (found via Edit| Preferences or EndNote| Preferences by choosing the Sync category). Here you can check (and correct) your EndNote Online credentials.

Many users do not want EndNote to sync the libraries automatically, but only when they choose to click or similar. In this case, it is important to clear the checkbox at the bottom of the dialog.

8.7. iPad App for EndNote

This app may be useful when working on a tablet, with the focus on consuming material (reading references, adding them to the EndNote Online library, making small corrections to a reference) rather than creating content (writing documents, citing references from your library). So this is the emphasis of the app.

A browser is provided within the EndNote app, where you can visit your chosen database and collect a few references. When ready, you can use the same procedure you usually follow at that website, for directly exporting your chosen references and PDFs to your EndNote Online library (see Part 3.3 above).

Although Safari is provided on an iPad for general web browsing, it is not always successful at directly exporting references from bibliographic database websites. This is why the EndNote app provides an embedded browser, and you should use that to browse the database sites and collect references.
If you feel that a similar app should be available for Android or other platforms, do by all means lobby the EndNote company ...

**Exercise 19: Sync preferences**

Now look at this exercise (page 75).

**8.8. Basic or Full *EndNote Online* Library?**

A “Basic” account is now free for any user; this has less functionality than the full product but may be enough to get started with. Sign up at [www.myendnoteweb.com](http://www.myendnoteweb.com).

Users with a licence for *EndNote* desktop (as described in part 8.3) get the best experience online, with more features, more output styles, bigger library allowance (unlimited references and unlimited attachment storage) and PDF syncing.

This licence lasts for 2 years. In *EndNote Online*, your personal expiry date is shown under **Options**|**Account Info**. In *EndNote*, set up syncing between your online library and your desktop library in the preferences: in **Edit**|**Preferences**|**Sync** or **EndNote**|**Preferences**|**Sync**, you can enter your online credentials and enable Sync.

**8.9. Oxford University Users – Roaming Access**

Because Oxford University holds a licence for *EndNote*, users who are members of the University have improved searching credentials.

“Roaming” means that once your EndNote Online library is marked as an Oxford University one, you can connect to your *EndNote Online* library from anywhere, using any computer, and you will have Oxford status.

You can set up (or renew) Oxford roaming in several ways:

- set up or re-visit your *EndNote Online* library using a computer on the Oxford network (i.e. connected with a wire to the University network)

- set up or re-visit your *EndNote Online* library using any computer with VPN running (including using VPN with any wireless access, Eduroam, OWL etc.)

- set up or re-visit your *EndNote Online* library using the Institutional Login link on [www.myendnoteweb.com](http://www.myendnoteweb.com), and give your Oxford SSO credentials

You need to renew your Oxford roaming at least once every 12 months.

**8.10. Multiple *EndNote Online* Libraries**

Each online library is associated with an email address. You can have as many libraries as you can find email addresses.

Remember to change the email address that *EndNote* is syncing with (in **Edit**|**Preferences**|**Sync** or **EndNote**|**Preferences**|**Sync**).

Many users also choose to disable automatic syncing. *EndNote* (desktop) will recognise and query if you try to sync a library with a different *EndNote Online* library.
9 EndNote on the Move

The simplest workflow model is for one researcher to have one EndNote library, stored on their one preferred desktop computer. They also have one EndNote Online library and frequently sync references between the desktop library and the online library.

However, if you work using a number of computers, transferring your EndNote library and/or your Word documents, there are a few aspects that need thought and planning.

With any of these ways of working, it is important to keep frequent backup copies of the work.

9.1. Working on a Document Without EndNote

If using a computer that has Word but not EndNote installed, you can work on the word-processing aspects of a document. You can change the text and format the document without damaging any citations, but you will not be able to edit the citations or bibliography or insert further citations. You will not be able to change the output style applied to the citations and bibliography.

It is important to keep frequent backup copies of the work.

9.2. Travelling Library - Working on a Paper Without Your Full Library

When citations in a Word document are formatted, EndNote builds a travelling library, which forms part of the .docx file. The travelling library contains data for only the references cited in the document, and for the minimum number of relevant fields.

Using a computer that has EndNote software installed, you can continue work on the citations in a document, because the travelling library brings enough details about the cited works along with the Word document.

Note that the travelling library disappears when the document is unformatted (for instance using Convert Citations and Bibliography or Convert to Plain Text, as discussed in a later course “Referencing: Citations and bibliographies with EndNote”, see Part 11.1 below). This makes the document smaller.

It is important to keep frequent backup copies of the work.

9.3. Transferring Your Library Between Computers

Many researchers move frequently between computers, taking their work with them. An EndNote library can usually be kept on a memory stick so you can use it with any computer that has the EndNote software installed.

It is important to keep frequent backup copies of the library.

As described in Part 6.1 Backup, if transferring a library between devices you must take both the EndNote file [MyLibrary].enl and the folder [MyLibrary].data.

It is important to keep frequent backup copies of the library.

Make sure that both computers have the same version of EndNote. The EndNote Help states that an EndNote library is directly compatible across Windows and Macintosh platforms.
Some discipline will be needed, to control the versions of the library. Much the simplest strategy is to keep all references in one library, even if it grows to several thousand references.

It is important to keep frequent backup copies of the library.

**Making a Compressed Copy of a Library**

The command *File| Compressed Library| Create* is useful for this. It compresses the pair of files ([MyLibrary].enl and [MyLibrary].data) into a compact format suitable for sending, with a filename similar to [MyLibrary].enlx. This can include all the library references with any attachments you may have collected.

On receiving the .enlx file, you would open it using *EndNote’s File|Open* and continue work as usual.

9.4. Transferring Style Files

Any customised output styles which you may have created or edited can be copied from one computer to another. Each output style is defined in a separate file, with a filename similar to [MyStyle].ens. The usual location for customised styles on a Windows computer is similar to *My Documents\EndNote\Styles*. The usual location on a Mac is similar to *Users/YourName/Documents/EndNote/Styles*. In both cases, the precise location depends on the version of *EndNote* you have, and the way it was installed.

So using a tool such as *Windows Explorer* or *Finder* you would copy the .ens file from one computer to the other, perhaps using a memory stick for transferring.

There is more on customising output styles in a related course, “Referencing: *EndNote* - Citations and bibliographies”, see Part 11.1.

9.5. Transferring Reference Types

Customised reference types are stored in the reference type table, which is managed independently. The reference type table can be transferred between computers using *Export...* and *Import...* in the Reference Types part of the Preferences dialog (there is more on customising reference types in the ITLC Portfolio at [http://portfolio.it.ox.ac.uk](http://portfolio.it.ox.ac.uk)).

In any case, it is important to maintain frequent backup copies of the *EndNote* library, in case of disaster or simple muddle (see Part 6.1).
10 Sharing EndNote with Colleagues

10.1. Co-writing a Document
When passing a document between several authors, for each person to work on, the safest method is to unformat the citations (with Windows, use and choose Convert to Unformatted Citations; with a Mac choose CWYW Tools| Convert to Unformatted Citations). Each citation now appears in the form {Jones, 2010 #23}, and this is the most compact and stable condition.4

When working on a word-processed document, some care would be needed to ensure that all collaborators are using the same versions of style definitions.

It is particularly important, when collaborating on documents, to keep frequent backup copies of the work in progress.

10.2. Sharing a Library - Options
The usual strategy is to build just one library, holding all your references, organised using groups. However, there are exceptions.

One member of a team may need to look after separate EndNote libraries on behalf of several colleagues. It is possible to open several libraries at once using EndNote, and indeed to copy references between them using drag and drop or Copy/Paste.

Alternatively, several colleagues may share one library, perhaps saved in a shared location such as the departmental network. Again, discipline is needed to keep track of versions of the library, as EndNote will not supervise this (there is no provision for record locking).

Another model for collaborative working is for one person to be responsible for all editing, correcting and adding data to a master copy of the library. Everyone else only has access to a read-only copy. This means that they can all look at, sort, search and copy references and format papers. This restriction is set up, not within EndNote, but using your network’s access controls, or by changing the file properties to Read-Only. Thus the editor, who keeps a separate copy of the library, is the only person who may correct and edit it, and they post the updated library from time to time to a location where other people can use it but not edit data.

10.3. Sharing References With Colleagues, using EndNote
If you are exchanging data, it is important that all members of the team use the same version of EndNote software. The EndNote Help states that an EndNote library is directly compatible across Windows and Macintosh platforms.

A small number of references can be shared with a colleague by emailing (References| Email reference will send the basic field data and the PDF if one is attached).

Alternatively, the File| Compressed Library command has options to send just a few references in a group, with or without attachments.

4 Unformatting citations is discussed in the course “Referencing: Citations and bibliographies with EndNote”, see Part 11.1.
The travelling library (see Part 9.2 above) also provides a neat way of copying a small number of references between colleagues: send a copy of a Word document where the required references are cited, and your colleague can retrieve them from the travelling library into their own library using 🔄 Export Traveling Library.

10.4. Sharing References with Colleagues, using EndNote Online

If colleagues also have EndNote Online libraries, you can share references. This is managed by collecting the references to be shared into a group in your own online library, then permitting some people to share a group.

![Sharing Some Groups from EndNote Online](image)

Figure 42 Sharing Some Groups from EndNote Online

For each of your groups in EndNote Online, you can grant colleagues access, either read-only or read-write. Each colleague is specified by giving the email address where their EndNote Online library is registered.

Note that this method allows selective sharing of references in certain groups, and allows levels of sharing (Read-Only, Read-Write) for individuals.
Exercise 20: Sharing references online (Optional)

Now look at this exercise (page 76).

10.5. Team Sharing a Whole EndNote Library

A whole EndNote desktop library can be shared with up to 14 colleagues. This service is available to those who already have their own EndNote Online library and have at least version X7.2 of EndNote desktop.

Once your desktop library has been synced with your own online library (see Part 8.5 above), you can permit sharing with colleagues, using File|Share.
Each colleague receives an email inviting them to participate. They respond by visiting the *EndNote Online* website and giving their login credentials for their own *EndNote Online* library (or creating a new online library).

After this, each colleague who has agreed will see the option to **Open Shared Library** *(File menu)*. With this, they can open your library in a separate window from their own desktop library. Each colleague has full read-write access to the whole library. They can also copy references between their own desktop library and yours, using copy & paste or drag & drop. They have access to your entire *EndNote* library, including references, PDFs, and annotations.

Note that when a colleague opens a shared library there may be a delay of several minutes while the library is synced (a progress message appears in the status bar at the bottom of the *EndNote* window).
11 Other Resources

Now that you have some useful *EndNote* skills you may want to develop them further. IT Learning Centre offers a range of resources for study and teaching. Courses on citation management and related topics are described below. In all cases, please refer to the Oxford IT Courses web page (www.it.ox.ac.uk/courses) for further details.

11.1. Downloadable Course Materials and More
- **the ITLC Portfolio**

These course materials are available through the ITLC Portfolio, at [http://portfolio.it.ox.ac.uk](http://portfolio.it.ox.ac.uk).

Each course pack includes the course handbook in pdf form and a zip folder of the exercise files that you need to complete the exercises. Archive versions of the course book may also be useful if you use an earlier version of the software.

The ITLC Portfolio helps you find articles, videos, resources and weblinks for further IT study. For some resources, you will be asked for your Oxford (SSO) username and password.

11.2. Further *EndNote* Courses

Referencing: *EndNote* - Up & running
- topics that form the background to the present course

Referencing: *EndNote* - Citations and bibliographies
- more advanced work on the way citations and bibliographies are formatted in documents and papers

iSkills: Choosing and using referencing software (Bodleian iSkills)
- compares several similar tools

*EndNote* courses are taught using either *Windows* or Mac.

11.3. Word-processing Courses

Documents: Good practice in document design
Documents: Managing your thesis
Documents: Building long documents

11.4. Course Clinics

We encourage everyone to work at their own pace. This may mean that you don’t manage to finish all of the exercises for this session. If this is the case, and you would like to complete the exercises while someone is on hand to help you, come along to one of the Clinics that run during term time.

More details are available from [www.it.ox.ac.uk/courses](http://www.it.ox.ac.uk/courses)

11.5. Study Videos

During the workshop, I will point you to a variety of resources that will help you in achieving these objectives.
Videos to support these topics are available from Lynda.com. Visit Lynda.com and search for “EndNote” to see a variety of videos.

Watching these videos requires an Oxford University account with Lynda.com. Read about Lynda.com here: http://portfolio.it.ox.ac.uk/resource/lyndacom/lyndacom-welcome-about-these-videos-and-learning-resources.

11.6. IT Services Help Centre

For Help Centre opening times, visit www.it.ox.ac.uk/help/gettinghelp/ and follow links to the General Helpdesk, or contact them by email on help@it.ox.ac.uk.

11.7. Useful Websites

The main site for EndNote software: www.endnote.com/

Style Finder at www.endnote.com/support/enstyles.asp

The EndNote toolbar is created automatically when you install the Cite While You Write plug-in (a plug-in for Word: toolbar appears in Internet Explorer) or the Firefox Extension. These are available at the EndNote website.

Adept Scientific, the UK supplier of EndNote http://endnote.adeptscience.co.uk

EndNote Online, the alternative tool online www.myendnoteweb.com

Bodleian Libraries website: www.bodleian.ox.ac.uk

Oxford preference settings for Find Full Text: search in the ITLC Portfolio http://portfolio.it.ox.ac.uk

OLIS Oxford University library catalogue: http://library.ox.ac.uk

OxLIP e-resources: www.bodley.ox.ac.uk/oxlip/

Portal connects to many international databases, listed by Subject or alphabetically by Title

HubMed Citation Finder, an informal tool that tries to match text pasted from a reference list with references in PubMed: www.hubmed.org/citation.htm

Online tutorials from the EndNote company: www.endnote.com/training
# Appendix: Student Exercises

## Exercise 1 Getting started
- Visit the ITLC Portfolio
- Find the article with the web addresses for this course
- This article lists the web addresses you will visit for the hands-on exercises

### Task 1
An article in the ITLC Portfolio gives clickable links to the websites used in this course
An alternative to following the links given in this article is to search for the databases using Oxford University's OxLIP+ portal

<table>
<thead>
<tr>
<th>Task 2</th>
<th>Start a web browser</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Use the Start menu (Windows) or Applications folder (Mac)</td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>Start a web browser such as Mozilla Firefox</td>
</tr>
</tbody>
</table>

### Task 3
Visit the ITLC Portfolio and search for the article that gives the web addresses for this course

<table>
<thead>
<tr>
<th>Step 1</th>
<th>In the Address bar, type <a href="http://portfolio.it.ox.ac.uk">http://portfolio.it.ox.ac.uk</a></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 2</strong></td>
<td>In the white search box at the centre of the Portfolio home page, type <strong>EndNote: Building your library - web addresses for the exercises</strong></td>
</tr>
<tr>
<td><strong>Step 3</strong></td>
<td>In the search results list, click the article called EndNote: Building your library - web addresses for the exercises</td>
</tr>
<tr>
<td><strong>Step 4</strong></td>
<td>This article includes a table with the web addresses for each exercise of this course</td>
</tr>
</tbody>
</table>

### Task 4
When an exercise in this course handbook tells you to visit a certain website, you will click the link given in this table

### Task 5
Leave the web browser open at this Portfolio article, ready for the next exercise
Exercise 2  Online researching

- Visit the website for Art Full Text
- Search for references using suitable criteria
- Look through the references found, marking some which are of interest

| Task 1 | If you are using a computer which is not on the Oxford University network, you should usually start **VPN** before visiting the Art Full Text site |
| Task 2 | This website may not work with **Internet Explorer**, so use **Mozilla Firefox** |
| Task 3 | In the *Portfolio* article with today’s exercise addresses, use the link provided to visit the Art Full Text website |
| Task 4 | Search for peer-reviewed items published in 2013 which have the phrase *late renaissance* in their title |
| Task 5 | In this website, the place where you collect the items that interest you is called your **folder** |
| Task 6 | Beside an interesting item, click |

---

5 Read about obtaining and using VPN in the IT Services web pages
[http://help.it.ox.ac.uk/network/vpn/index](http://help.it.ox.ac.uk/network/vpn/index)
### Place about 3 interesting items into your “Folder”

**Step 1**
Use at the top of the window, to look at the contents of your folder

**Step 2**
Do this for some more items, until you have about 3

### Task 7
Look at the items in your folder

### Task 8
Leave this web page open at this point, ready for the next exercise

### Exercise 3  Online researching - direct download

- **Open an EndNote library, which has some references already collected**
- **Re-visit the website for Art Full Text**
- **Use this site’s direct download tool**
- **Download the selected references into the EndNote library**

If you are working in our teaching rooms, all the local files for these exercises have been provided for you in an area known as **Drive H**.

**Task 1**
Open *EndNote* with the library **renaissance.enl**

**Step 1**
Start *EndNote*:

- Use the *Windows* Start menu
- You will find it among the *Applications* using *Finder*

**Step 2**
If an existing library appears, close it (leaving *EndNote* open)
If a message appears about being unable to find a certain library, cancel it – you are going to open a library that is provided

**Step 3**
Choose **File|Open Library** or click

**Step 4**
In the **Open** dialog, browse to **Drive H**
or another location as directed by your teacher

**Step 5**
Locate **renaissance.enl** and open it
<table>
<thead>
<tr>
<th>Task 2</th>
<th>Step 1</th>
<th>Step 6</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check that <em>EndNote</em> is in Integrated Mode</td>
<td>In the toolbar, look at the mode selector: <img src="image" alt="Mode Selector" /> or <img src="image" alt="Mode Selector" /></td>
<td>A number of references have already been set up in this library You are going to locate some more relevant references from online databases, and add them to this library</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 3</th>
<th>Step 1</th>
<th>Step 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continue work in the <em>Art Full Text</em> website used in a previous exercise</td>
<td>Use the web browser window that is open from the previous exercise, with the <em>EBSCOhost Art Full Text</em> website</td>
<td>Check that Integrated Mode (third button) is selected as shown</td>
</tr>
</tbody>
</table>

Note: you can switch between open windows using the buttons on the taskbar or Dock, or by pressing ALT+TAB or CMD+TAB

<table>
<thead>
<tr>
<th>Task 4</th>
<th>Step 1</th>
<th>Step 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export the references from the “Folder” to your library Use the <strong>Direct Export in RIS Format</strong></td>
<td>Make sure you are looking at the “Folder” <img src="image" alt="Folder" /> in <em>EBSCOHost Art Full Text</em></td>
<td>You have already marked about 3 interesting references and placed them in your folder <img src="image" alt="Folder" /> If not, return to the previous exercise and follow the directions there</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Step 3</th>
<th>Step 4</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Click <img src="image" alt="Export" /></td>
<td>Choose to format the citations for <strong>Direct Export in RIS Format</strong> Then click <img src="image" alt="Save" /></td>
</tr>
</tbody>
</table>
### Step 5
Depending on which browser you are using, do one of the following, or an equivalent:

- Choose to [Open](#) the file
- Choose to [**Open with… Export Helper**](#) and click **ck**
- Choose to [Open](#) and click **Choose…**

Do not choose to [Save File](#)

### Step 6
If asked, confirm that the new references are to be inserted into `renaissance.enl` (confirm the filename and location)

### Task 5
Examine the references that have just been added to your library, deleting any unwanted ones

### Task 6
Leave this library open for the remaining exercises in this course

### Exercise 4  **Downloading references from PubMed** *(Optional)*
- Visit PubMed and select some references
- Download them into the EndNote library
- Select a suitable input filter
- Examine the references that have arrived

### Task 1
*PubMed* offers a wide range of references in the medical and bio-medical fields, with a sophisticated search tool

The *PubMed* website can export references directly into an *EndNote* library

### Task 2
This activity works best with *Mozilla Firefox* (do not use *Internet Explorer*)
<table>
<thead>
<tr>
<th>Task 3</th>
<th>Visit the <em>PubMed</em> website and select a few references</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>In the <em>Portfolio</em> article for today’s course, use the link for Exercise 4 to visit the <em>PubMed</em> website</td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>Search for references that interest you, using the simple search box provided at the top of the home page</td>
</tr>
<tr>
<td><strong>Step 3</strong></td>
<td>Or click the <em>Advanced</em> link and search there</td>
</tr>
<tr>
<td><strong>Step 4</strong></td>
<td>In the Search results list, place a tick beside 3 references that interest you</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 4</th>
<th>Send the chosen references to the <em>EndNote</em> citation manager</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>At top right of the search results list, click <em>Send to</em></td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>From the list of Destinations, choose <em>Citation manager</em></td>
</tr>
<tr>
<td><strong>Step 3</strong></td>
<td>Click <em>Create File</em></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 5</th>
<th>Allow the Direct Export Helper to import the references into your <em>EndNote</em> library</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Depending on which browser you are using, do one of the following, or an equivalent:</td>
</tr>
<tr>
<td></td>
<td>Choose to <em>Open</em> the file</td>
</tr>
<tr>
<td></td>
<td>Choose to <em>Open with… Export Helper</em> and click <em>OK</em></td>
</tr>
</tbody>
</table>
| | Choose to *Open with* and click *Choose…*, then browse among the Applications to *EndNote*
| *Do not choose to *Save* the references* |
| **Step 2** | If the browser offers *Find* instead of *Open*, when selecting a software destination for your exported references, try using the *Mozilla Firefox* browser |
| **Step 3** | If asked to choose an import filter, locate the *PubMed (NLM)* filter in the list offered |

<table>
<thead>
<tr>
<th>Task 6</th>
<th>Examine the downloaded references in your library</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Make any changes or deletions that are necessary</td>
</tr>
</tbody>
</table>
### Exercise 5  Downloading references from SOLO (Optional)

- Visit SOLO and collect some references in the e-Shelf
- Download chosen references into the EndNote library
- Examine the references that have arrived

### Task 1
Visit the SOLO website and select a reference

**Step 1**
In the *Portfolio* article for today's course, use the link for Exercise 5 to visit the SOLO website

**Step 2**
Use the simple search box on the home page to search the SOLO catalogue for references that interest you

### Task 2
Place a few interesting references in your e-Shelf

**Step 1**
Next to an interesting reference, click

**Step 2**
If several versions of a reference are held, click then click next to one version

**Step 3**
Repeat until you have a few references in the e-Shelf

### Task 3
Push the chosen references to EndNote

**Step 1**
At the top right corner of the window, click

**Step 2**
Place ticks beside some of the items in the Basket

**Step 3**
In the *Select how to save* list, choose *Push to Citation Manager (RIS)* and click *Go* *(Do not be distracted by the option of *EndNote Web*)

**Step 4**
In the *Push to RIS* pop-up, choose *UTF-8*

### Task 4
Allow the Direct Export Helper to import the references into your EndNote library

**Step 1**
When asked, choose to *Open* the .ris file using the *ResearchSoft Direct Export Helper*

*Do not choose to *Save* the file*

### Task 5
The chosen references are imported immediately into your *EndNote* library; they are now displayed in a temporary group

Examine the downloaded references in your library

Make any changes or deletions that are necessary
## Exercise 6  Downloading references from OxLIP+ CrossSearch (Optional)
- *OxLIP*+ can carry out a cross-search of several databases
- *OxLIP*+ can export your chosen references into your EndNote library

<table>
<thead>
<tr>
<th>Task 1</th>
<th>Step 1</th>
<th>Step 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visit the <strong>CrossSearch</strong> part of <em>OxLIP</em>+ website</td>
<td>In the <em>Portfolio</em> article for today’s course, use the link for Exercise 6 to visit the <em>OxLIP</em>+ website</td>
<td>Use the blue tab bar to display the <strong>CrossSearch</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 2</th>
<th>Step 1</th>
<th>Step 2</th>
<th>Step 3</th>
<th>Step 4</th>
<th>Step 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use the <strong>CrossSearch</strong> to find some databases in your subject area</td>
<td>Use the <strong>Subject</strong> drop-down list to select your subject</td>
<td>If appropriate, use the <strong>Sub Categories</strong> list to refine the subject further</td>
<td>Some relevant databases are listed in the central panel</td>
<td>Those which are cross-searchable have a checkbox</td>
<td>Tick about 3 databases that sound interesting</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>You will probably see more cross-searching checkboxes if you log in (give your Oxford username and password)</td>
<td><em>Do not click any underlined text link, as that will take you to visit the database’s own website</em></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 3</th>
<th>Step 1</th>
<th>Step 2</th>
<th>Step 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set up a search for interesting references</td>
<td>Use the search boxes to set some criteria, such as a phrase to appear in the <strong>Title</strong> and also a <strong>Year</strong></td>
<td>Click  to search for relevant items</td>
<td>Wait till all your chosen databases have done searching</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 4</th>
<th>Step 1</th>
<th>Step 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a few references to “My Research”</td>
<td>Next to an interesting reference, click  to add it to your collection called “My Research”</td>
<td>Repeat this for about 4 more references</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 5</th>
<th>Step 1</th>
<th>Step 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use the blue tab bar to display <strong>My Research</strong></td>
<td>Use the checkboxes to mark about 3 references</td>
<td></td>
</tr>
</tbody>
</table>
| **In My Research**, save the chosen references into your EndNote library | **Step 2**  
Click the text link **Save/Email** (not the floppy disk icon) |
| --- | --- |
| **Step 3**  
In the Selected Records dialog which pops up, choose to **Save** the references | **Step 4**  
Set the **Record format** to **EndNote** (avoid the **EndNoteWeb** format)  
Click **Save** |
| **Step 5**  
If your browser asks whether to Open or Save, choose to **Open with the Export Helper** | **Step 6**  
If an “application not found” message appears, click **OK** then **Choose** and browse to the **EndNote** application software on your computer |
| **Step 7**  
The web export helper starts **EndNote** (if it is not already open) and asks you to browse to your library (if not already open) | **Task 6**  
Check the references as they arrive in your library  
**Step 1**  
The chosen references are imported immediately into your library  
**Step 2**  
Examine the references and edit as necessary to make them suitable for your library |
Exercise 7  More searching and downloading (Optional)

- ProQuest includes an archive of dissertations and theses
- Use ProQuest's own search tool to locate some interesting items
- Select a few from those presented
- Export details of the selected items into your EndNote library

Task 1
Note: If you are using a computer which is not on the Oxford University network, you should usually start VPN before using the ProQuest site.

Task 2
Visit the Proquest collection of UK & Ireland Dissertations & Theses

<table>
<thead>
<tr>
<th>Step 1</th>
<th>The Proquest site uses pop-ups for the exporting process, so make sure your browser is allowing this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2</td>
<td>In the Portfolio article for today's course, use the link for Exercise 7 to visit the Proquest collection of UK &amp; Ireland Dissertations &amp; Theses</td>
</tr>
</tbody>
</table>

Task 3
Use the Advanced Search to request a list of dissertations and theses, in some interesting field

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Near the top of ProQuest’s first page, click the link to Advanced Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2</td>
<td>On the ProQuest Advanced Search page, set up a search for references with some interesting term in the Document title TI</td>
</tr>
<tr>
<td>Step 3</td>
<td>In the Publication date drop-down, choose a suitable date range</td>
</tr>
<tr>
<td>Step 4</td>
<td>Click Search</td>
</tr>
</tbody>
</table>

Task 4
Choose about 4 interesting items

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Look through some of the references found</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 2</td>
<td>Pick a reference that seems interesting</td>
</tr>
<tr>
<td></td>
<td>Click to place a tick in the checkbox beside your chosen reference</td>
</tr>
<tr>
<td>Step 3</td>
<td>Mark about 4 different items in this way</td>
</tr>
<tr>
<td></td>
<td>Notice the message just above the results list, reporting the number of items you have selected</td>
</tr>
</tbody>
</table>

---

6 Read about obtaining and using VPN, in the IT Services web pages http://help.it.ox.ac.uk/network/vpn/index
### Task 5
Export the chosen references directly into **renaissance.enl**

**Step 1**
When ready, choose ![Save] at top right of the results list  
Then choose **RIS**

**Step 2**
In the **Export/Save** dialog which pops up, choose to:  
- **Output** to **RIS**  
- **Content** is **Citation etc.**

Scroll down and click ![Continue]

**Step 3**
When asked about opening this file, choose to **Open with ... Export Helper**  
or choose to **Open with** and click ![Choose...], then browse among the Applications to **EndNote**

If asked, confirm that you want to export the citations into **renaissance.enl**

### Task 6
The 4 or so references which you chose have now been copied into your **EndNote** library  
Inspect them in the temporary **Imported References** group, deleting any unwanted references

### Task 7
When ready, display **All References** to see the whole augmented library

### Task 8
Leave the **EndNote** library open for later exercises  
Finally, close the web browser

### Exercise 8  Including further information with a reference
- **Attach a web address to a reference**
- **Attach a figure to a reference** (optional)

### Task 1
Continue work in **renaissance.enl**

### Task 2
**Step 1**
Double-click the Fletcher 2004 reference in the library list to open it
| Open the Fletcher 2004 reference | **Step 2**  
Locate the URL field - you may need to use **Show empty fields** from among the options or. 
Type www.it.ox.ac.uk/courses  
You could also insert an address by copying and pasting from your web browser |
|---------------------------------|--------------------------------------|
| **Task 3** Optional | **Step 1**  
Open the Hart, Day 1995 reference  
**Step 2**  
Click  or  
Click **Choose File** and browse to Drive H, to find the image file keyboard.jpg  
**Step 3**  
Click **Open** to attach the chosen file to this reference  
**Step 4**  
Scroll down as necessary to see a thumbnail of the image, in the **Figure** field |
| Attach the image file keyboard.jpg to the Hart, Day 1995 reference |  |
| **Task 4** | **Exercise 9** Working with an attached PDF  
- *Attach a file whose PDF has previously been saved*  
- *Read the full text of the document*  
- *Work in the PDF viewer*  
- *Highlight and annotate text in a PDF* |
|  | **Task 1**  
Continue work in *renaissance.enl* library  
**Task 2**  
Find and select the reference Koshikawa, 2001 (by sorting or by using the Quick Search box)  
**Task 3**  
Suppose the full text of this paper has already been downloaded and saved in Home Drive H  
**Task 4**  
Attach the PDF file which is provided with your student |
|  | **Step 1**  
With the Koshikawa reference selected, choose **References|File Attachments|Attach File** or use at the top of the Reference panel  
|
files, **Apelles.pdf**, to this reference

### Step 2
In the dialog, browse if necessary to the student files provided in **Home Drive H**
Select the PDF file **Apelles.pdf**

### Step 3
Make sure the checkbox **Copy this file** is ticked
Click [Open]

#### Task 5
An alternative method of attaching a PDF to a reference is to drag the filename from *Windows Explorer* or *Finder*, and drop it onto the reference in *EndNote*

#### Task 6
Inspect the reference and confirm that the PDF text document has been attached

### Step 1
In the Reference panel, scroll down the fields to find the **File Attachments**

### Step 2
Confirm that the **Apelles.pdf** file has been attached here
A copy of the original file has been saved in the folder **renaissance.data**

#### Task 7
View the PDF file in the PDF panel

### Step 1
Use the tabs at the top of the Reference panel to view the PDF

### Step 2
Use the buttons at the top of the PDF panel to page through the document

### Step 3
Experiment with zooming and rotating the document

#### Task 8
Try out the annotating and highlighting tools

### Step 1
Click [ ] and drag over some text in the PDF, to highlight a phrase
Click [ ] and type a note such as “Check this with Bob”

#### Task 9
Open the PDF in a separate window

### Step 1
Click [ ] to open this PDF in a separate reference window, which may be more convenient for reading
Use [ ] to close the PDF viewer window

#### Task 10
Open the PDF using Adobe Reader

### Step 1
In the panel at the right of the *EndNote* window, right-click the tab that shows the PDF filename

### Step 2
Choose a command similar to **Open with Adobe Reader** (if available on your computer)
### Step 3
Here you can use all the familiar controls for reading, annotating and managing the PDF

### Step 4
Close the Adobe (or similar) software, saving as you wish

#### Exercise 10  Finding the full text PDFs
- Obtain the full text of a paper automatically
- See the paper PDF downloaded and attached to the reference

#### Task 1
A group called “Get full text please” has been set up in the renaissance library
These are the papers for which you are seeking the full text as PDFs

#### Task 2
Find the full text of some of the selected papers, using EndNote's automatic tool

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Select all the items in the group that we have labelled “Get full text please”</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Choose <img src="image" alt="icon" /> or <img src="image" alt="icon" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2</th>
<th>Wait while EndNote connects to online sources to locate and downloads the text of some of these articles</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>You may be asked to give your Oxford credentials</td>
</tr>
</tbody>
</table>

#### Task 3
Watch the progress

<table>
<thead>
<tr>
<th>Step 1</th>
<th>While some papers are being downloaded, you can follow progress in the Find Full Text group (look under My Groups in the Groups panel on the left of the screen)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>This temporary group will be deleted when the library is closed</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2</th>
<th>A message appears in the status bar, showing progress</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Step 3</th>
<th>If the full text of a given paper cannot be downloaded, a URL (clickable link) may be inserted in the URL field</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Not all papers can be found online</td>
</tr>
</tbody>
</table>

#### Task 4
View a paper that has been downloaded

<table>
<thead>
<tr>
<th>Step 1</th>
<th>Click on a reference which has a paperclip symbol added</th>
</tr>
</thead>
</table>

| Step 2 | View the attached PDF in the PDF viewer                                                                           |
### Exercise 11  Creating a reference from a PDF

- Look at a PDF which has previously been collected
- Create a new reference in the EndNote library
- Examine the new reference

#### Task 1
Continue work in `renaissance.enl` library

#### Task 2
Inspect `Medici Skeletons Article.pdf` which has been downloaded

##### Step 1
Suppose you have previously downloaded the full text of a paper, as a PDF file
Using a file navigation tool such as Windows Explorer or Finder, browse to drive H
Locate the paper `Medici Skeletons Article.pdf`

##### Step 2
Open the paper in a pdf reader such as Adobe Reader, and briefly notice the details such as authors, title, year

##### Step 3
It would take some time to create a reference in your EndNote library, by typing or copy/pasting the details into appropriate fields
Close the pdf reader, without changing the paper

#### Task 3
Import the details from the PDF file into the EndNote library

##### Step 1
Click [ ] or choose File | Import

##### Step 2
In the Import dialog, click [Choose...](#) if present
Browse to drive H
Open `Medici Skeletons Article.pdf`

##### Step 3
Set the Import Option to PDF
If this item does not at first appear on the drop-down list, choose Other Filters and find it in the full list

##### Step 4
Click [Import](#) to import the data from the text file into the EndNote library

#### Task 4
A new reference has been created, with the PDF attached (notice the paperclip icon)
Examine the new reference that has been created, a paper by Casatta and others in 2015.
## Exercise 12  Backup copies of a library

- Create a backup copy of the library for storing in a safe place
- Create a compressed copy of the library for sending to a colleague
- Resolve to make backup copies frequently and regularly

### Task 1
Continue work in *rennaissance* library

### Task 2
Create a backup copy of the library

| Step 1 | Choose File|Save A Copy |
|--------|------------|
| Step 2 | In the **Save A Copy** dialog, choose to save the file in your **drive H** (ask your teacher or demonstrator if you are not sure) |
| Step 3 | Name the file *renaissance backup1.enl* |
| Step 4 | Use *Windows Explorer* or *Finder* to confirm that the backup has been made, and that both the *library.enl* file and the attachments *.data* folder have been backed up |
| | You would usually move these files to a removable storage device such as a CD, or to a network drive which is backed up frequently |
| Step 5 | Wasn’t that easy? Make a plan to do this frequently and always keep plenty of backup copies in a safe place |

### Task 3
Create a compressed copy of the library, suitable for sending to a colleague

| Step 1 | Choose File|Compressed Library|Create |
|--------|------------|
| Step 2 | Choose to save this file with today’s other work, in your **drive H** |
| | Name this file *renaissance2.enlx* |
| Step 3 | Use *Windows Explorer* or *Finder* to confirm that the compressed copy has been made |
| | You might send this compressed copy to a colleague who is collaborating on the same documents |

### Task 4  *(Optional)*
Close *renaissance.enl*

Use 📹 or File|Open to open and decompress *renaissance2.enlx*
Exercise 13 Finding and removing duplicates

- *EndNote finds any references which appear to be duplicates*
- Inspect them carefully
- Delete any surplus duplicate references
- Alter the list of fields which need to match to define duplicate references
- Repeat the search for duplicates and discover whether there were more pairs to be found

<table>
<thead>
<tr>
<th>Task 1</th>
<th>Continue work in renaissance.enl</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task 2</td>
<td>Search for any duplicate references which may have been collected from the various sources you have searched</td>
</tr>
<tr>
<td>Step 1</td>
<td>As you have collected references from various sources, it is likely that you will have found citations of the same work in several databases</td>
</tr>
<tr>
<td>Step 2</td>
<td>Choose **References</td>
</tr>
<tr>
<td>Step 3</td>
<td><em>EndNote</em> displays a pair of references which match in terms of author, year, title and reference type</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 3</th>
<th>Inspect the pairs If you agree that some are duplicates, delete the unnecessary references</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td>Looking at the pair of <em>Liberal Arts Studiolo</em> references, scroll down both references to see which contains more detailed information Choose to <strong>Keep</strong> the better-quality reference</td>
</tr>
<tr>
<td>Step 2</td>
<td>Look at the next pair Watch out for references which are similar but not actually duplicates</td>
</tr>
<tr>
<td>Step 3</td>
<td>If both members seem to contain useful (but different) information, use <strong>Copy &amp; Paste</strong> to include all the useful information in one reference, and <strong>Keep</strong> that one (the other will be deleted)</td>
</tr>
<tr>
<td>Step 4</td>
<td>Work through all the suspected duplicate pairs, deleting the poorer member/s as appropriate</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Task 4</th>
<th>When you searched for duplicate entries, the search may not have been rigorous – for example, various online databases have different conventions for presenting multiple author names, so some duplicates entries may have been missed</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Look through and see if you can spot any such</td>
</tr>
</tbody>
</table>
## Task 5
Change the criteria for duplicates so that author names need not match exactly

### Step 1
Choose **Edit|Preferences** or **EndNote|Preferences** and the **Duplicates** category.

### Step 2
Clear the **Author** checkbox and click **OK**.

## Task 6
Run the search for duplicates again

### Step 1
Choose **References|Find Duplicates**.

## Task 7
Examine the candidate duplicates carefully, before deciding which really are duplicates and which should be deleted

## Exercise 14  Finding and fixing gaps in data
- *Find any references which have a gap instead of data*
- *Change data values for all displayed references*

## Task 1
Continue work in **renaissance.enl**

## Task 2
Delevise a search of your library which will list any references which have no keywords entered
Leave the results of the search on display

### Step 1
Ensure that you have all references showing
Use **All References** in the Groups panel.

### Step 2
Clear any previous settings in the Search panel.

### Step 3
In the Search panel:
Select the **Keywords** field
Select the operator **Is** (to replace **Contains** etc.)
Put nothing in the search-text box.

### Step 4
Run the search and look at the list of references which have no keywords
Leave the results of the search on display.

## Task 3
Add the keyword **To study** to each of the references displayed

### Step 1
You might want to make your library more usable by including keywords
Suppose that the references displayed are the ones you have not studied yet

### Step 2
Choose **Tools|Change and Move Fields** and display the **Change Fields** tab.
**Step 3**
Use the top control to select *In Keywords*

**Step 4**
Type *To study* in the empty white box
Clear the *Include a space* checkbox

**Step 5**
Click ![OK](image)
Now all the references showing will have this keyword

---

**Exercise 15  Changing the fields displayed (Optional)**
- *Rearrange columns displayed*
- *Control which fields are shown in the columns of the library list*
- *Add additional fields in the library list*
- *Change the column headings in the library list*

**Task 1**
Continue work in *rennaissance.enl*

**Task 2**
Drag a column heading sideways and drop it to rearrange columns

**Task 3**
Display Record Numbers in column 1 instead of the Image symbol

**Step 1**
Choose **Edit | Preferences | Display Fields** or **EndNote | Preferences | Display Fields**

**Step 2**
In the dialog, in the *Field* drop-down for Column 1, choose *Record Number*

**Step 3**
Click ![OK](image) or ![Save](image)
Confirm that the leftmost column of the library now shows a number for each record

**Step 4**
Click the column heading *Record Number* to sort the references in numerical order by this value
The record numbers are assigned automatically as the references are added to the library, so this is now the order in which records were created

**Task 4**
Display Keywords in column 6 instead of the Journal

**Step 1**
Choose ~|Preferences|Display Fields again

**Step 2**
In the dialog, use the drop-down for column 6 and choose *Keywords*
<table>
<thead>
<tr>
<th>Task 5</th>
<th>Change the heading of the URL column to read [Web address]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td>Choose [Preferences] [Display Fields] again</td>
</tr>
<tr>
<td>Step 2</td>
<td>In the dialog, click in the text box opposite the [URL] field</td>
</tr>
<tr>
<td>Step 3</td>
<td>Type [Web address]</td>
</tr>
<tr>
<td>Step 4</td>
<td>Click [OK] or [Save]</td>
</tr>
<tr>
<td>Confirm that the column heading in the library window has changed</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Exercise 16</th>
<th>Changing the way names are sorted (Optional)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set some name prefixes to be ignored when sorting</td>
<td></td>
</tr>
<tr>
<td>Set some title words to be ignored when sorting</td>
<td></td>
</tr>
<tr>
<td>Consider other preferences that can be adjusted</td>
<td></td>
</tr>
</tbody>
</table>

| Task 1 | Continue work in [renaissance.enl] |
| Task 2 | Set up some items with author prefix [el], [von] and [de] |
| Step 1 | Edit a reference so that its author name has the prefix [el] |
| Step 2 | Edit some more names to have the prefixes [von] or [de] |

| Task 3 | Notice that we already have several references whose Title begins with [on] |
| Task 4 | Set some name prefixes to be ignored when sorting: [el], [al], [von], [de] |
| Step 1 | Choose [Edit] [Preferences] or [EndNote] [Preferences] and the [Sorting] category |
| Step 2 | In the [Author Field] area, type [el] in the text box |
| Then click [Add] |
| Step 3 | Repeat, adding some more name prefixes such as [al], [von] or [de] |
EndNote: Building your library

**Step 4**
Add a “small word” preposition such as **on** to the **Title Field** list

**Step 5**
Click **OK** to implement the changes

**Task 5**
References with author names or titles beginning with these prefixes will be sorted correctly, taking account of the ignore-list

**Task 6**
Test the new items on the ignore-lists, by sorting the library

**Task 7**
Explore the other categories available among the **Preferences**
Change some if you wish

**Exercise 17  Creating a library with EndNote Online**
- Create a new online library account
- Carry out the first sync between desktop and online libraries

**Task 1**
Close the **renaissance.enl** library
Open the smaller library **alpine2.enl**

**Task 2**
Check that **EndNote** is in integrated mode

**Task 3**
You are going to create a new library for **EndNote Online**

**EndNote Online** is sometimes known as **EndNote Web**

**Note:** Even if you already have a personal account with **EndNote Online**, do not use that for these exercises, as this may damage your own collection of references, and syncing may take a long time
## EndNote: Building your library

### Task 4
In *EndNote* preferences, create an *EndNote online* account

| Step 1 | In *EndNote* desktop, choose **Edit| Preferences| Sync** |
|--------|--------------------------------------------------|
| Step 2 | Click [Enable Sync](#) then click [Sign Up](#). Follow the instructions in the dialog to create an account |
| Step 3 | Answer the questions. Give fictitious answers if you prefer not to give personal information |
| Step 4 | Make a note of the email address and password that you have set up; you will need them shortly. In the **Sync** category of the **Preferences**, click [Apply](#) and close the dialog |

### Task 5
Start Sync

| Step 1 | Click [](#) or choose **Tools|Sync** |
|--------|----------------------------------|
| Step 2 | Authorise with your (fictitious) credentials and answer further questions if asked |
| Step 3 | When registration is complete, click [Sync](#) |

### Task 6
The first time you sync a desktop library to an online library, you are encouraged to make a compressed backup copy of the library. The first sync may take several minutes – when you have the habit of syncing frequently, future syncs will be quicker.

### Exercise 18  Synchronising libraries online and on the desktop

- *Look at the library online*
- *Sort references in the library*
- *Search for a reference in the library*
- *PDFs are synced between the desktop and online libraries*
- *Groups are synced*
- *Changes, edits and deletes are synced*
- *Sync frequently to avoid long delays*

### Task 1
Continue work in *alpine2.enl*
EndNote: Building your library

| Task 2 | Start Firefox  
| Visit www.myendnoteweb.com |
| Task 3 | In the **Sign in** page, give the email address and password that you gave when registering |
| Task 4 | Inspect the references that have arrived in the online library |
| Step 1 | In *EndNote Online*, In the panel on the left, under **My References**, click **Unfiled** |
| Step 2 | The references in the online library are listed in the centre panel  
All the references from the desktop library have been copied into the online library |
| Task 5 | Explore the library on the **My References** tab |
| Step 1 | Click column headings to sort the references by Author, Year or Journal |
| Step 2 | Experiment with the **Sort by** control at top right |
| Step 3 | Type **leaf** into the **Quick Search** box at top left  
Click **All My References** to display the full list again |
| Step 4 | Click a blue article title to look at the field data in detail  
Click **Return to list** to see the whole list of references again |
| Task 6 | Where a file or PDF was attached to a reference, this has been transferred |
| Step 1 | Click a blue paperclip to view an attached PDF  
A grey paperclip means that no PDF is attached |
| Step 2 | If a URL has been entered, a clickable Online Link is offered below the reference |
| Task 7 | Groups have been synced from the desktop library |
| Step 1 | Notice that the same group names have been set up, which you had in the desktop library  
The same references are now shown as members of the same groups |
Task 8  
Edit some references in the online library  

Step 1  
Open Anderson, 2012  
Edit the journal title to *J Geomorphology*  
Click `Save`  
Return to the full list  

Step 2  
Select Argnani, 2013 by clicking the checkbox beside the reference  
Use the **Add to group** control to make this reference a member of the SEBS group  

Step 3  
Select Baldi, 2012 and use **Delete** to delete the reference (it is moved to Trash)  

Task 9  
Sync  

Step 1  
In *EndNote*, click ** or choose **Tools|Sync**  

Task 10  
Changes made in the online library are now shown in the desktop library  
The more recent version of a reference (from either library) is the one that is kept  

Exercise 19  **Sync preferences**  
- *Inspect the Sync preferences*  
- *Confirm the credentials of your online library*  
- *Control the frequency of syncing*  

Task 1  
Continue work in `alpine2.enl`  

Task 2  
Display the Sync preferences  

Step 1  
In *EndNote*, choose **Edit|Preferences** or **EndNote|Preferences**  

Step 2  
In the Preferences dialog, choose the **Sync** category in the list on the left  

Task 3  
Confirm the EndNote Account Credentials  

Step 1  
Under **EndNote Account Credentials**, edit the email address if necessary  

Step 2  
This should be the email address (possibly fictitious) that you gave when registering for *EndNote Online*  

Step 3  
Edit the password as necessary
**Task 4**
Confirm the filename and path of the desktop library you are working in

Most workers have one desktop library which they sync frequently with one online library

<table>
<thead>
<tr>
<th>Task 5</th>
<th>Set the automatic sync checkbox as you prefer</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Under <strong>Sync Automatically</strong>, clear the checkbox</td>
</tr>
<tr>
<td></td>
<td>Many workers prefer never to have their libraries synced automatically; sync is then only performed when you decide to click ➡️ or choose **Tools</td>
</tr>
</tbody>
</table>

**Task 6**
Close the **Preferences** dialog
Your changes are saved

**Exercise 20  Sharing references online (Optional)**
- Manage groups in EndNote Online
- Create a new group
- Share the new group with a colleague

**Task 1**
Visit your *EndNote Online* library at www.myendnoteweb.com, using Firefox

**Task 2**
View the groups already set up

| **Step 1** | On the **Organize** tab, choose **Manage My Groups** |
| **Step 2** | Notice that the same groups are here, which you have in your desktop library |
| **Step 3** | You can manage the groups here: rename or delete a group, create a new group |

**Task 3**
Create a new group called *Trinity term project*

| **Step 1** | At the bottom of the list of groups, click ➔ **New group** |
| **Step 2** | Enter the new group name *Trinity term project*** |

**Task 4**
Share the *Summer school prep* group with a colleague
Allow them to read and edit the references

| **Step 1** | Check **Share** next to the group called *Summer school prep* |
| | Click ➔ **Manage Sharing** |
| | Click the link to **Start sharing this group** |
| Step 2 | In the pop-up, type the address of the person who you want to share this group: 

p.tucker@sys.ox.ac.uk  
or your teacher on today’s course  
Note you must give the email address with which the colleague registered their *EndNote Online* library |
|---|---|
| Step 3 | Choose **Read & Write**  
Click **Apply** |
| Step 4 | When you have closed this window, return to **My References** and check that the **Summer school** group now has a share icon  
This folder will appear in your colleague’s online library, in the list of Groups |
| Step 5 | They will be able to read the references in the group which you shared  
If you have allowed read & write access they will be able to edit your references |
| Task 5 | When finished, close all browser windows and close *EndNote* |
EndNote: Building your library

Resources for your learning

Activities for you to practice today
- Work at your own pace!
- Be selective

Video playlists with today’s topics in Lynda.com

Follow-up work
- Continue with exercises after the session
- Bookable Course Clinics

Course topics

- Researching at remote databases
- Downloading references on-line
- Attaching PDFs and other data
- Finding PDFs
- Library housekeeping
- Customising EndNote displays, sorting etc.
- EndNote Online
- Synchronising local and online
- EndNote on the move

Build a library of references

Later … insert citations
EndNote: Building your library

**Getting started with EndNote**

*EndNote version X7*

- in ITLC teaching rooms

**Start EndNote**

- Use the Start menu, Dock etc.
- Or open an existing library

**Opening a library (database file)**

Today, please work in your home drive H

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**Building a library of references**

1. **Using EndNote to search online**

   EndNote connects to an online source
   
   Matching references download into your library

2. **Online search and direct export**

   Visit individual websites & portals
   
   - Note some databases don’t connect using Safari
     
   - (can often use FireFox)
   
   Every site is different
   
   Use the site’s own tools to search and export
   
   References are copied directly into EndNote

**SOLO and OxLiP+ Cross-search can export directly to EndNote**
PubMed and Google Scholar can export to EndNote

3. Import in 2 stages

Got references in hand-typed text?

Re-acquire references from your usual database
Use Update Reference Details to fill in gaps

Try Hubmed: www.hubmed.org/citation.htm

Today’s exercises use web links

Find them in the ITLC Portfolio:
http://portfolio.it.ox.ac.uk

EndNote: Building Your Library

Exercises: 1 - 7

Web addresses are in the ITLC Portfolio
http://portfolio.it.ox.ac.uk
Search for “endnote building”

Note the EBSCOHost Art Full Text and PubMed examples may not work with Internet Explorer - try Mozilla Firefox instead

In Ex 7, allow pop-ups at ProQuest

Restart at 10:15 am please
Attaching PDFs and other data to a reference

Working with PDFs

PDF viewer built in
View the PDF alongside the reference library or in separate window
Page, zoom, print, highlight, sticky note
Or open using Adobe etc PDF software
Search a whole reference including PDF, notes etc

PDFs and papers

Find Full Text
searches online for selected articles
Downloads a copy if possible; else the URL
Better results if you use Oxford credentials, details at
http://www.bodleian.ox.ac.uk/bdiss/resources/endnote
Create a new reference from a paper full text
Import a PDF
Set an auto-import folder

Create a reference from a paper online

Capture from a paper online
Capture tool drag & drop to Bookmarks
While reading a paper online
Creates a reference for that paper
In EndNote or EndNote Online

Housekeeping

Full text of an article
Copy/paste URL or DOI for a paper held online
Or attach a file previously downloaded (PDF etc.)
PDF file renaming options
EndNote: Building your library

Back up your data

Disks fail, viruses attack

Make backup copies of the library file
- Frequently!
- File\Save A Copy
- Or File\Compressed Library

*Copy MyLibrary.enl*
*and MyLibrary.data*

Removing duplicates

Same source may be listed in several libraries, with small differences
- References|Find Duplicates
- *EndNote* considers a duplicate if author, year, title and reference type all match
- Now delete the unwanted reference (choose carefully)

What is a duplicate?

*Find Duplicates* lists pairs of references that seem to be duplicates
- Check *EndNote* Preferences | Duplicates
  - Choose fields
  - Exact or approximate match

Tidying the imported references

*Find Reference Updates*
- Searches online for the latest field data (selected references)
- Rearrange data in unsuitable fields
  - Move data from one field to another
- Capitalisation
  - Change case eg. paper titles - various options

Changing the layout

*Layout* moves the *Groups* panel and *Reference* panel to suit your monitor
- Buttons choose reference / preview / PDF

*Choose which fields displayed*
- Drag & drop or right-click to change
- Preferences

Customising *EndNote*
### Read/Unread references

When a ref has been *visited*
- changes to
- Text loses Bold

In Preferences, customise this behaviour

### Working in other languages?

Use a suitable font to display diacritics etc.

Spellcheck dictionaries are set in Preferences

*Windows*
- Change the main dictionary language
- Add other spelling dictionaries

### Words to ignore when sorting

Small words *(the, a, etc.*) at the start of Titles are ignored

Can ignore prefixes in Author Names

**Preferences| Sorting**
- Add or remove words
- Separate lists for Authors or Titles

### EndNote: Building Your Library

Exercises: 8 - 16

Restart at 11:20 am please

### If you want to continue with the Exercises, you could ...

Copy the Exercise files to a memory stick

Download the files (and more) from the ITLC Portfolio at [http://portfolio.it.ox.ac.uk](http://portfolio.it.ox.ac.uk)
EndNote: Building your library

EndNote Online

EndNote on the Desktop or EndNote online?

EndNote online
- Free to join
- Software and library are on the web
- Need internet access www.myendnoteweb.com
- Formatting bibliography & citations is less convenient

EndNote (on the desktop)
- Install on your own computer
- Customizable e.g. output styles
- An Add-in to Word

So use both 😊

An EndNote library online

My References - your library stored online

Group
- Organise your references
- Same groups as your desktop library

Try the EndNote app for iPad

Building the online library

Collect online
- Visit databases and add more references

Capture from a paper online
- Capture tool drag & drop to Bookmarks
- While reading a paper online

Sync libraries online ↔ desktop

Keep online and desktop libraries synced
- Sync includes groups, Trash, PDFs

Control Sync behaviour in Preferences|Sync
- Sync automatically?

EndNote on the move

Without EndNote
- Use Word to work on word-processing only

Travelling library
- Use EndNote and the citations stored with document

Hot-desking
- Store library on a memory stick or via EndNote Online
- Custom output styles, reference types
- Careful version control!
  - Version of the EndNote software!
  - Versions of your library!
Sharing and collaborating

One library per person is simplest
or ...
Save a library on shared network drive (back up!)
Share references via EndNote Online
   Permit other EndNote Online users to share your group/s
      (read-only or read-write)
Share a whole library
   Up to 14 colleagues
   Opens in a separate window
   Read-write the whole library

More about EndNote

Obtaining EndNote software

Oxford University campus licence for EndNote
   ask your department
or get your personal copy from IT Services Online Shop
or from Bilaney Consultants, Adept Scientific
Websites for more information
   www.endnote.com/
   www.bodleian.ox.ac.uk/bdltss/resources/endnote
   www.bilaney-consultants.co.uk/our-products/endnote.html
   www.adeptscience.co.uk/

Other useful courses

EndNote:
   Up & Running
   Citations and Bibliographies
      } using Windows or Mac
Documents:
   Good Practice in Document Design
   Managing Your Thesis
   Building Long Documents

If you want to continue with the Exercises, you could ...

Copy the Exercise files to a memory stick
Download the files (and more) from the ITLC Portfolio at
   http://portfolio.it.ox.ac.uk

EndNote: Building Your Library

Exercises: 17 onwards
Finish at 12:15 please