

# Lecture Notes

## Endnote – Advanced Reference Management

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We appreciate your feedback.

This script is updated regularly. Nevertheless, if you find out that the information is no longer up-to-date or you have suggestions for improvement, we look forward to receiving an e-mail at [workshop@ub.tum.de](mailto:workshop@ub.tum.de).

The current version of this script can always be found under the following link: <https://media-tum.ub.tum.de/1439512>

# 1 Content of the EndNote Introductory Course

The EndNote Introductory Course covers the following topics which are required for the EndNote Advanced Course:

- Importing titles into EndNote (manual entry, import from the TUM online catalog, import from a database, importing references to EndNote via the online search function)
- Basic knowledge of how to organize references into groups in EndNote and how to find references in the EndNote library
- Working with the Word add-in (inserting references into Word and formatting reference lists in a chosen citation style)

The current lecture notes for the EndNote introductory course can be found here:

<https://mediatum.ub.tum.de/1128680>

## 2 Handling PDFs in EndNote

In EndNote, you can rename downloaded PDFs to more descriptive filenames. Additionally, EndNote provides a feature to import PDFs that are already stored on your computer into your reference library.

### 2.1 Importing PDF Folders

In EndNote, you can import entire folders, including subfolders containing PDFs. From the menu, choose **File → Import → Folder**. The Import Folder dialog box will open. In the field **Import Folder**, select the desired folder from your computer. In the **Duplicates** field, select how duplicates should be handled. You also have the option of creating a Group Set for this import. If your selected folder contains subfolders, these will be converted into Groups as part of the set. Otherwise, the PDFs will appear in the **Imported References** folder.

You may notice that EndNote does not import the correct title data for all PDFs when importing.

EndNote first searches the PDF for a DOI and researches the corresponding title data on the Internet. However, if the PDF does not contain a DOI or if it's a scanned PDF and not machine-readable, EndNote uses the document's metadata. In many cases, only the name of the file is available here.

In this case, subsequent editing of the data is required. If you know the DOI of the article, enter it into the corresponding field and select the function **Find Reference Updates** in the **References** menu. If no DOI is known, manually enter the author, title, and year into the corresponding fields and select the function Find Reference Updates.

For all datasets, check if the retrieved information is correct - even for those that EndNote added automatically.

### 2.2 Auto Import Folder

In addition to manually importing PDFs or folders of PDFs, you can also specify a folder from which new PDFs are to be automatically imported into EndNote; i.e., each time you open EndNote, the

program checks to see if new PDFs have been added to the selected folder and then automatically imports them.

To set this up, go to *Preferences* in the *Edit* menu and then to the item **PDF Handling**. There you can specify a folder in the section **PDF Auto Import Folder**, from which PDFs are automatically imported.

If there are subfolders in the selected folder, the PDFs (unlike a normal import) cannot be imported from these subfolders.

## 2.3 Renaming PDF Attachments

Often, PDF documents that you download from databases have cryptic, not very descriptive names. EndNote allows you to rename them according to a scheme you specify.

It could be, for instance, the scheme Author - Year - Title. You can set this up in the menu **Edit → Preferences → PDF Handling → PDF Auto Renaming Options**.

# 3 Organizing and Finding References in EndNote

What options do you have for sorting your references in EndNote?

Decide what information you want to see displayed in which order in the content window. Arrange your references in Custom, Combo and Smart Groups. Rate your references and keep track of how much of it you have already read and have yet to read.

Use keywords to find titles on a topic quickly, and keep your data consistent using term lists and searching for duplicates.

## 3.1 Displayed Columns

By left-clicking on one of the column headers (Author, Title, etc.), your entries are sorted alphabetically or by size. The order of the columns can easily be changed by drag and drop.

By right-clicking on a column header, you choose which information should or should not be displayed.

## 3.2 Rating & Read/Unread Status

In the **Rating** field, you rate your references using a 5-star system. You can also specifically search for references with a certain rating. In addition, you can use your rating as a criterion for a new Smart Group.

To keep track of which references you have already read and which you have not, EndNote offers the Read/Unread category. Unread references have a small gray dot in the Read/Unread category. Ones already read are displayed with a small dot with a tick.

### 3.3 Term Lists

EndNote automatically maintains lists for the fields Author, Journal, and Keyword. In other words, every item entered in this field is saved in the corresponding list. This serves to standardize terms. For instance, it is common for an author whose works are imported from different databases to be named differently. Sometimes, the first name is written out in full; other times, only the initials are given. With the Term Lists, you ensure that an author from whom you quote several works is always named the same way in your reference list.

Term lists are created automatically with the first entry (in the program, you will recognize a new entry using red font). You can also create them yourself or import ready-made Term Lists from EndNote. Especially in the case of journals' term lists, it is worth importing ready-made lists from EndNote, as different versions of abbreviations for individual journal titles are stored here (Fig. 12). EndNote supplies lists for various areas of studies. They are stored in the folder **Terms Lists**.

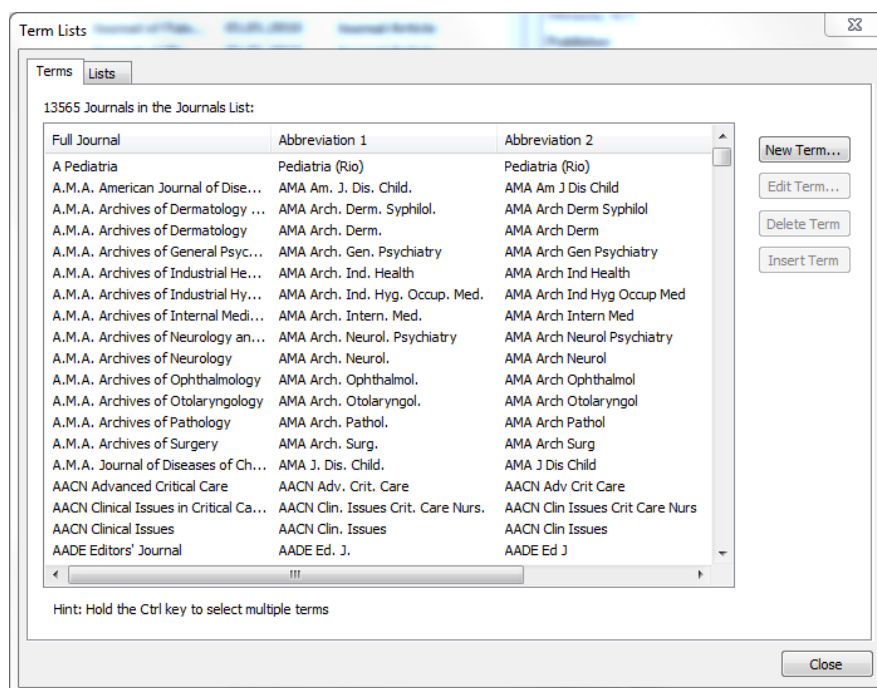


Figure 1: Journals Term List in EndNote

Via the menu **Library → Open Term Lists**, the individual Term Lists can be opened. The tab Terms shows you all terms contained in the Term List. In the tab Lists, you can switch between the lists and import or export your Term Lists.

For journals: If you have already collected journals in your EndNote Library, first delete all titles in the Terms tab. Then import the desired lists in the Lists tab and complete the imported list with your existing terms via the **Update List** button.

### 3.4 Finding Retracted Articles

From version 20.2 onwards, EndNote offers the function "Retractions". Every time EndNote is opened or closed, it will automatically check whether articles have been retracted. EndNote checks journal articles by their DOI or PubMed ID. In addition, the EndNote Library must be connected to

an online account (for more see Chapter 7). If you have deactivated automatic synchronization, this does not stop EndNote from searching for retracted articles. The articles are checked against the Retraction Watch Database. Only if the articles are listed there as retracted will EndNote recognize that they have been retracted.

The retracted articles are displayed in the navigation in the **Retractions** folder (see Fig. 13.). If you select a reference, a warning note is displayed in the summary tab on the right. Clicking on this warning note displays further information as to why the article was retracted.

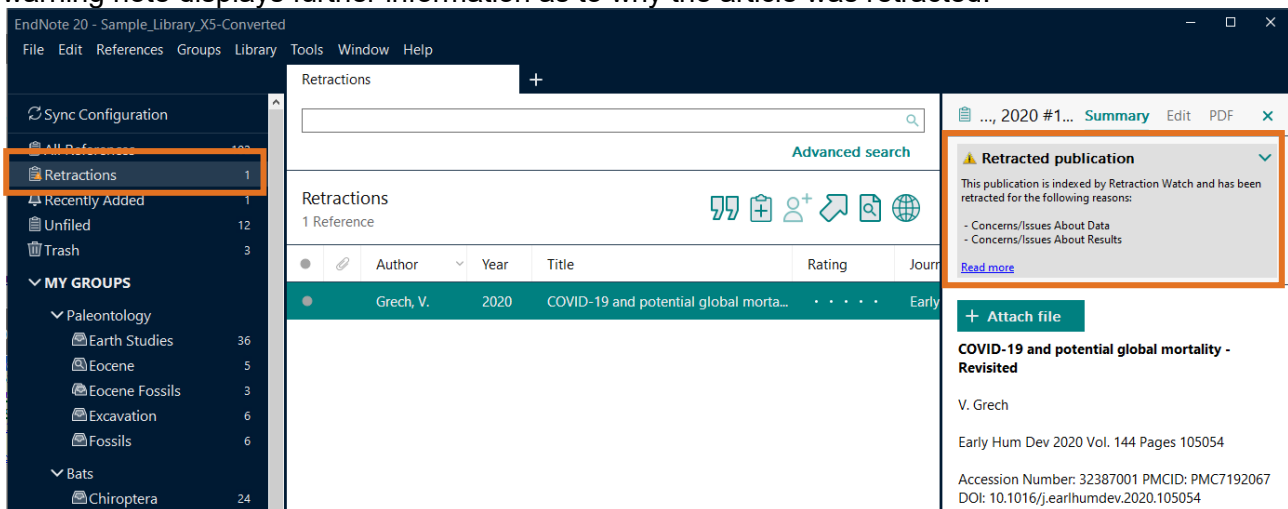


Figure 2: Retracted Articles in EndNote

## 3.5 Searching within EndNote

In EndNote, you have two options to search within your references, the simple search and the advanced search.

### 3.5.1 Saving Searches or Converting Them into Smart Groups

You can save these searches via the **Search options** button or convert them into a **Smart Group**.

### 3.5.2 Searching Multiple EndNote Libraries

When you conduct searches within EndNote, only the currently opened library is searched.

The only way to perform a search across multiple EndNote libraries is through the **Insert Citations** feature in Word. If you have installed the EndNote plug-in for Word CWYW (Cite while you write), use this feature to search for sources as you write. This feature searches across all opened EndNote libraries on your computer. The status bar of the search window shows the EndNote Library

in which the title you are looking for is stored (Fig. 16).

EndNote 20 Find & Insert My References ×

Search:   Search:

| Author     | Year | Title                                                                                            |
|------------|------|--------------------------------------------------------------------------------------------------|
| Waterho... | 2000 | An Eocene Fossil Mousebird: From the London Clay Formation at Walton-on-the-Naze, Essex, England |
| Teeling    | 2005 | A molecular phylogeny for bats illuminates biogeography and the fossil record                    |
| Sullivan   | 1998 | Fossil squamata from the San-Jose formation, early eocene, San-Juan Basin, New-Mexico            |
| Smith      | 2007 | High bat (Chiroptera) diversity in the Early Eocene of India                                     |
|            | 1998 | Eocene fossils                                                                                   |

**Reference Type:** Unpublished Work  
**Record Number:** 49  
**Author:** Waterhouse, D. M.  
**Year:** 2000  
**Title of Work:** An Eocene Fossil Mousebird: From the London Clay Formation at Walton-on-the-Naze, Essex, England  
**Institution:** University of Bristol, Department of Earth Sciences  
**Type of Work:** Unpublished BSc Thesis

Library: sample\_library\_x5 (2).enl 5 items in list

Figure 3: Searching across libraries via the Insert Citation feature in Word

## 4 Citing with EndNote's Word Add-In CWYW (Cite While You Write)

With the EndNote Word add-in, reference information can be quickly and easily inserted into the text. When entering the first reference into your text, EndNote automatically creates the reference list. As you work on your text, it will be constantly updated and supplemented in the chosen citation style.

### 4.1 Grouping Reference Lists

Reference lists are usually sorted alphabetically or in the order of appearance. Sometimes, however, it is useful to display some of the sources separately from the others, e.g., internet sources separately from the rest of the cited literature or separated into primary and secondary literature. To do this, you can use the **Categorize References** function in the Word add-in. Create the required categories using **Configure Categories**.

The categories (Category Headings) **Primary Sources** and **Secondary Sources** have already been added. Use **+Category Headings** to create new categories (see Fig. 19). Drag and drop the references from the **All References in Bibliography** into the desired category. An automatic assignment, e.g., via Custom or Smart Groups, is not possible.

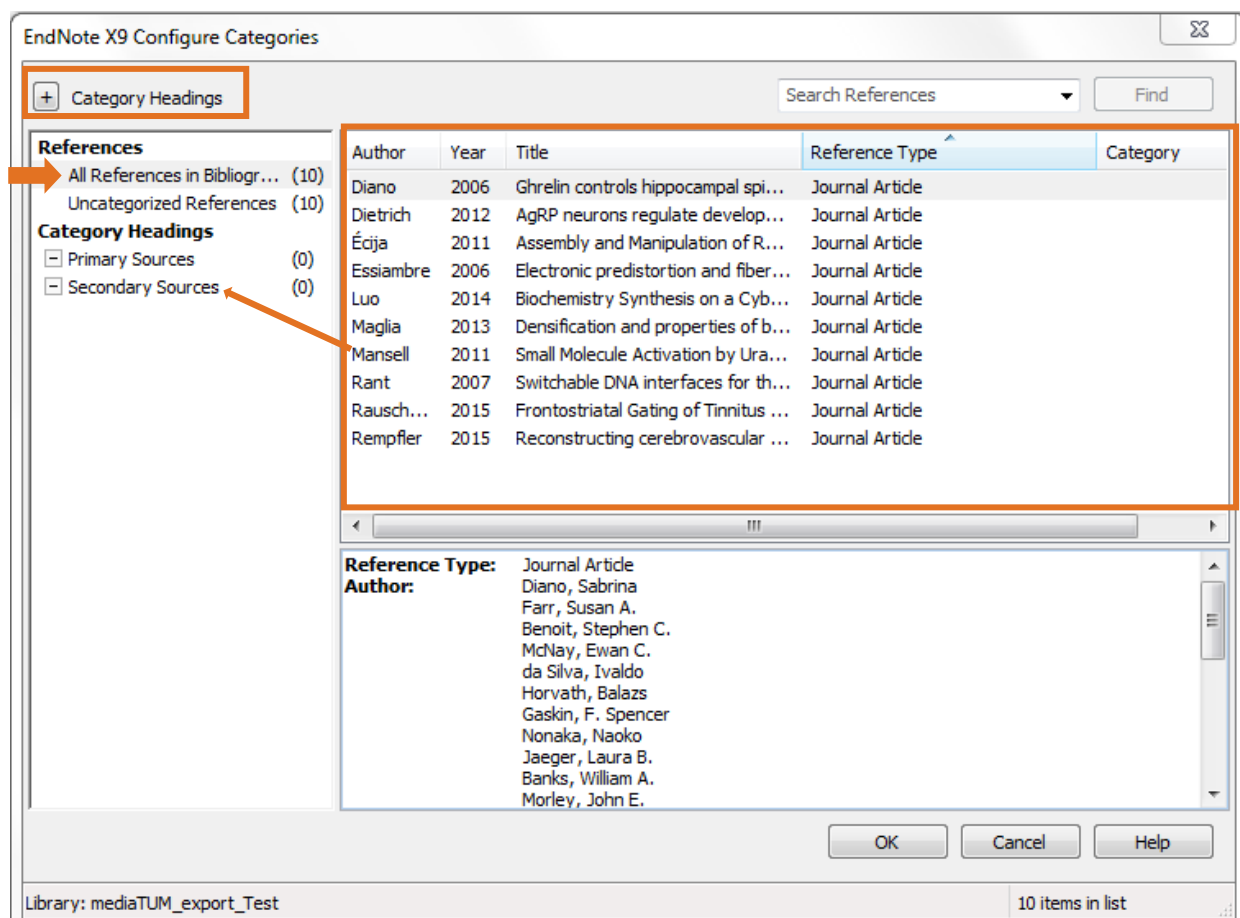


Figure 4: Creating new categories and assigning literature

## 4.2 Changing EndNote Style Sheets in Word

While the content of the reference list is determined by the citation style, the formatting is mostly defined by the style sheets. Once you have inserted the first source into your text using EndNote's Word add-in, you will find two additional style sheets in Word (see Fig. 20); the sheet **EndNote Bibliography** for entries in the reference list and **EndNote Bibliography Title** for the title of the reference list.

You can use the small drop-down menu next to the name of the sheet to change this style sheet (see Fig. 20).

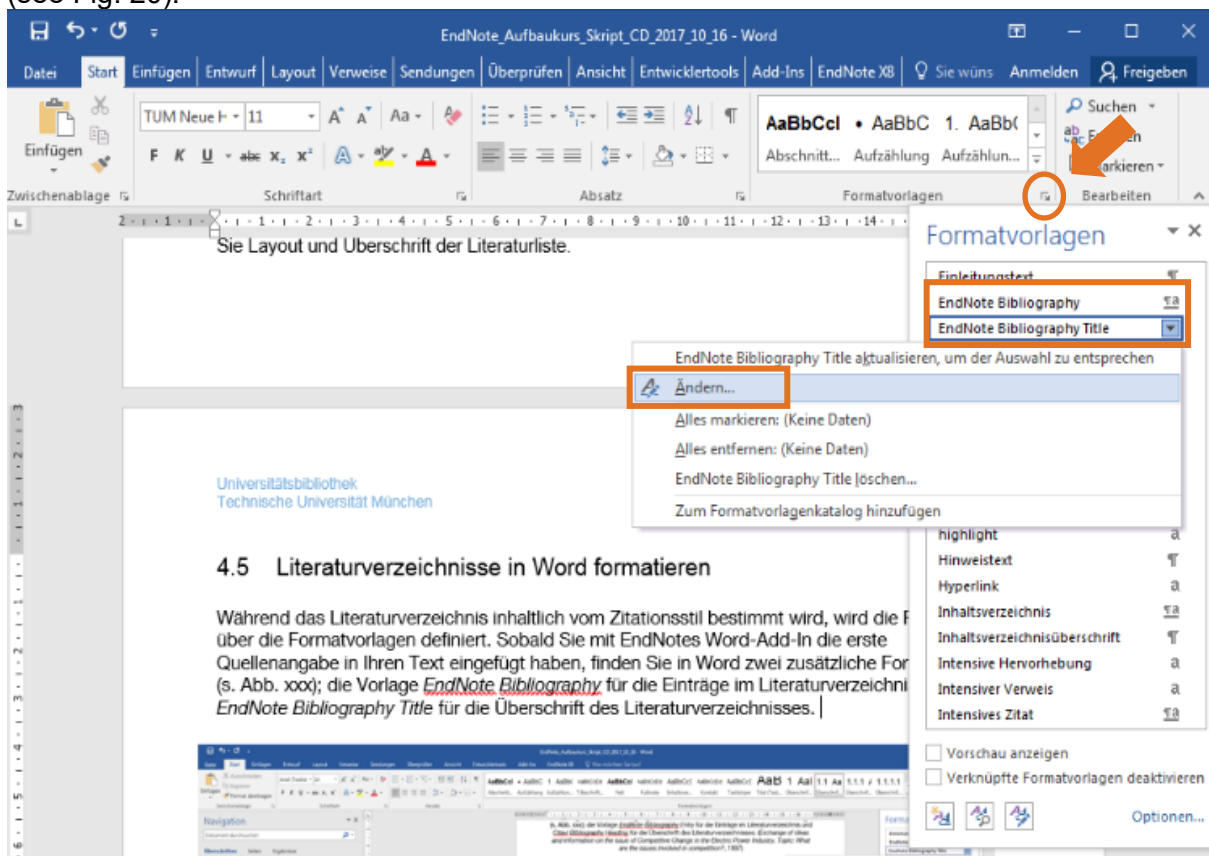


Figure 5: EndNote style sheets in Word

The style sheet lets you adjust the font and font size, line spacing, as well as the spacing between individual entries in the reference list.

## 4.3 The Travelling Library

A Travelling Library is created as soon as the first source is inserted into a text document with EndNote. The Travelling Library contains the bibliographic data of all sources cited in this Word document, with the exception of the fields Notes, Abstract, and Research Notes.

A Travelling Library can be exported to EndNote by other EndNote users from the Word document. If these datasets are then changed in EndNote, the changes are also displayed in Word. The prerequisite for all updates in Word is always that the EndNote Library used is opened. Otherwise, the data stored in the Travelling Library will be used for updating.

When importing a Travelling Library, the datasets are checked for duplicates.

## 4.4 Showing Cited References in EndNote?

EndNote creates a temporary folder with the name of the Word file (Fig. 22). This can only be seen as long as the Word document is open and contains all sources cited up to this point.

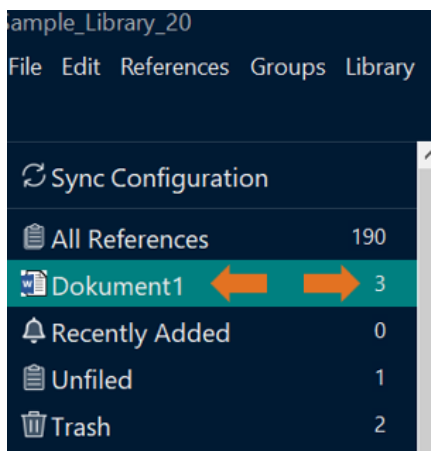


Figure 6: List of cited references

## 4.5 Faster Speed in Word – Instant Formatting

If you notice that it takes particularly long for Word to insert new references, temporarily disable the Instant Formatting feature while working on the document. In the EndNote menu in Word, select the button **Instant Formatting is On** and disable instant formatting. Additional settings for instant formatting can be made in the EndNote Preferences in Word under **Preferences > Tab General**. In order to format citations and reference lists at a later time, enable this feature again.

## 5 Creating Bibliographies by Keywords, Authors, or Years

To create bibliographies by different criteria such as keyword, author, or year, select **Tools** → **Subject Bibliography** in the menu.

In the **Subject Fields** dialog box, select the criterion or criteria by which the list should be sorted.

If you wish to obtain a list sorted by author, it is possible to have each author displayed individually (**List each author separately**). This means that works by more than one author are listed under each author's name and, thus, multiple times in the list. Then click on *OK*.

In the following dialog window, all entries based on the criterion are listed and the respective amount of found references are displayed.

If you, for instance, choose a list to be sorted by keywords, all keywords are listed here with the corresponding number of titles.

Choose **Select All** if you want a complete list, or mark all the terms you wish to include by clicking on them. Then click on *OK*.

Your bibliography will be created and displayed in a preview window.

For each keyword, a number in parentheses will show you how many corresponding titles there are in your library. Then, corresponding references are listed. You can make a few changes to the layout using the **Layout** button. In the drop-down menu **Output Style**, you choose the citation style in which the list should be displayed. Or you can once again hide or show additional keywords using the **Terms** button. Decide if you want to print or save the list.

## 6 Changing and Creating Citation Styles

EndNote offers a variety of different citation styles (Output Styles). These can be found in EndNote via the menu **Tools → Output Styles → Open Style Manager**. There you will find a selection of all available styles offered by EndNote. More styles can be found at <http://endnote.com/downloads/styles>.

In the Style Manager, you will find a preview window, below which the selected citation style is displayed (Fig. 26, 1). You might have to change the view to preview using the button **Style Info / Preview** (2).

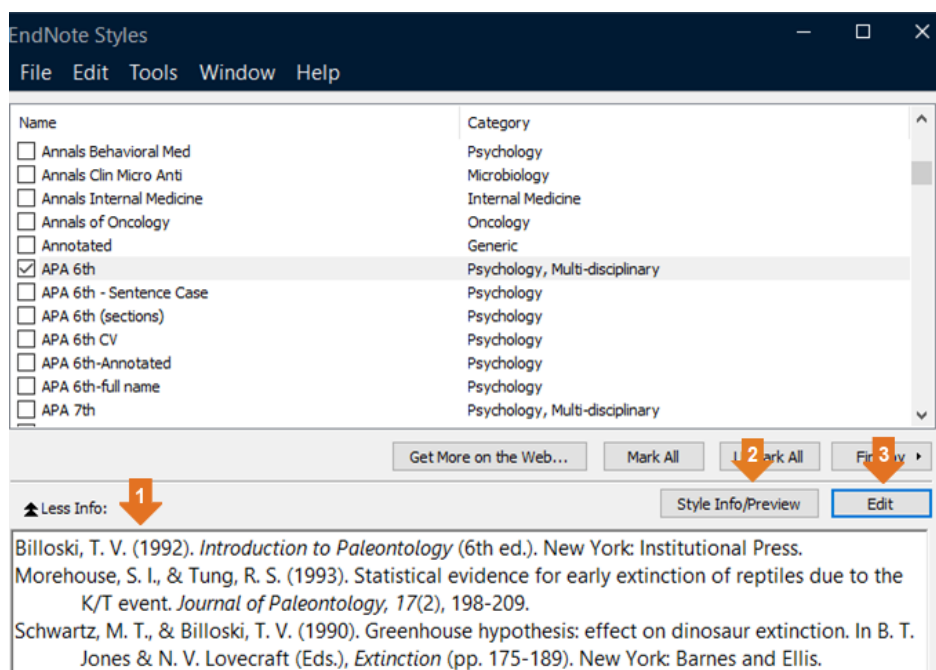
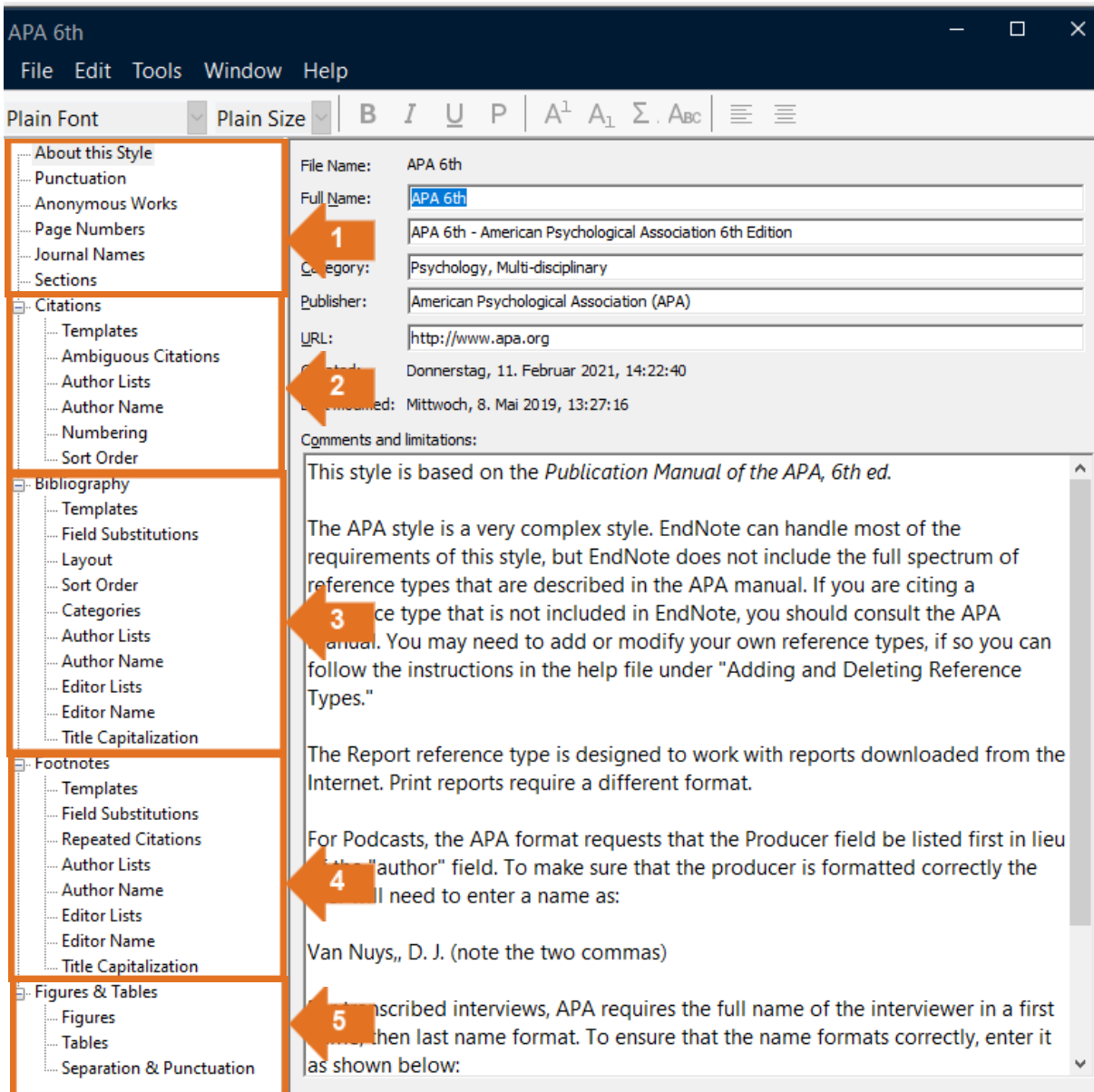


Figure 7: Output Style Manager

If you cannot find a suitable style either here or on the EndNote page, you have the option of customizing an existing style or creating a style yourself. We recommend selecting and customizing a style that is as similar as possible, as creating your own style requires a great deal of work.

If you wish to customize a style, select it in the Style Manager and click Edit to change it (3). The Style editor will open (Fig. 26).

The citation style defines what a citation should look like in the text (Citations, 2) or in the footnote (Footnotes, 4) and how the reference is displayed in the reference list (Bibliography, 3). Depending on whether it is a footnote style or an author-year style, make the settings either under field 2 or 4. Field 1 contains general information, such as how page numbers and journal titles are displayed and whether a reference list is created for each chapter or for the entire document. Section 5 (Figures & Tables) determines how figures and tables are displayed. Since this function is no longer maintained by EndNote, we recommend that you do not use it, but instead use the original Word



fea-

Figure 8: Output Style editor

tures.

## 6.1 In-Text Citations and Footnotes

In the **Citations** (2) or **Footnotes** (4) area (Fig. 26) on the left in the navigation, select the item **Templates** to specify the information in the text or in the footnote. In the citation style, all fields available in EndNote can be used, such as the fields Author, Title, Year, etc. In addition to the contents of the database fields, you can also use punctuation marks, letters, and special operators. Database fields and operators can be found via the Insert Field button (Fig. 28). If, when using the Insert Field feature, you were to insert, e.g., the field Author, it would not be the word author, but rather the content of this database field that is displayed in the citation. Punctuation marks separating each piece of information are entered by hand.

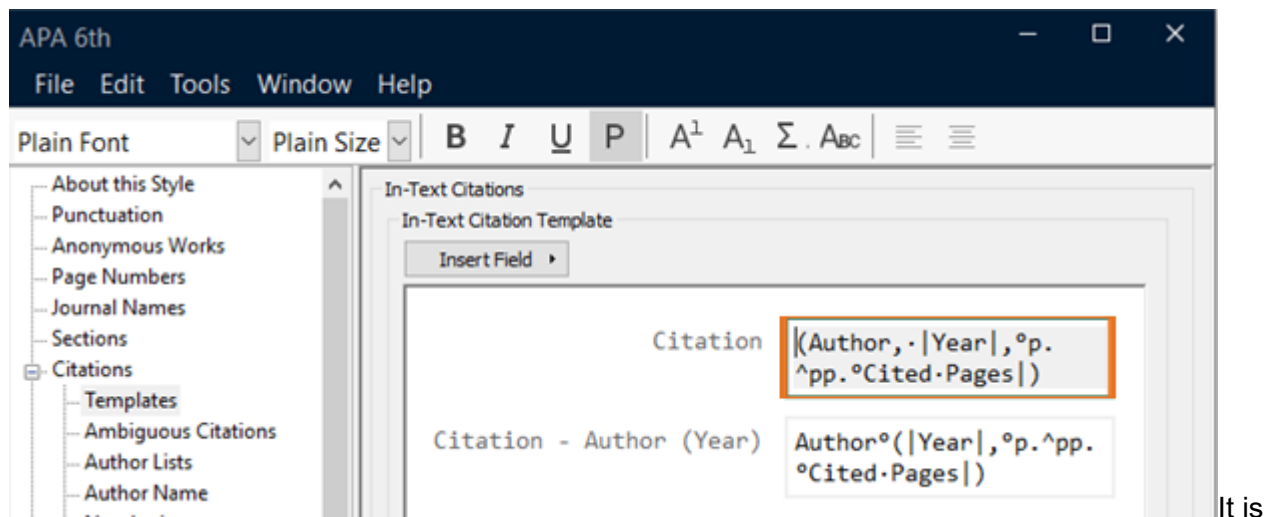


Figure 9: Customizing in-text citation

important to remember that it is still possible that a field has no content. This could cause two punctuation marks to follow each other, or leave a piece of information such as p. for the page reference without a subsequent page indication. To prevent this, there are special operators with which text elements can be linked to the content of a field. Details like p. or preceding punctuation are then displayed only if there is also a page number.

### Link Adjacent Text operator

The Link Adjacent Text operator (Fig. 29) helps to link text elements and field content. The text element is displayed only if the database field also has content. In Fig. 28, this operator is represented by a superscript circle symbol. Likewise, punctuation marks are linked with their subsequent elements. A Link Adjacent Text operator always sets a blank space automatically. The Link Adjacent Text operator can be found, e.g., between the indication *pp.* and the field **Cited Pages**. Blank spaces are represented by a simple dot at the center of the line height (following, e.g., the comma after the author's name).

If the linked text is the same as the name of the field, e.g., after the editor the word “editor” should appear, the text will be put into back quotes `editor`.

### Forced Separation operator

If the content of a field is missing, there are pieces of text and characters in the immediate vicinity of this information, which should also not be displayed, while all other information should be given as normal. A definition for an in-text citation, therefore, contains a subdivision into sections of meaning. To show EndNote these sections, the operator Forced Separation (vertical bar) is used.

If EndNote now encounters a forced separator when reading this definition, it first checks whether the following database field has any content. If this is the case, the citation will be written without displaying the operators. If the database field is empty, EndNote skips all information until the next forced separator and only then continues to write. To stay with the example of the page reference in Fig. 28, after an empty Cited Pages field, the entire content between the preceding forced separator and the following forced separator would be ignored, while the closing parenthesis after the forced separator would be displayed again.

## Singular/plural operator

So far, the indication p.4pp has remained unexplained. This feature can be used to make different textual statements for singular or plural. Depending on whether the linked database content contains one or more pieces of information, either the singular or the plural version is displayed. This is especially used in English citation styles for editors and page details. If there is a single editor, this is often indicated by (Ed.). If there are several, the specification is (Eds.). The singular version always precedes the singular/plural operator (circumflex), while the plural version is given behind it.

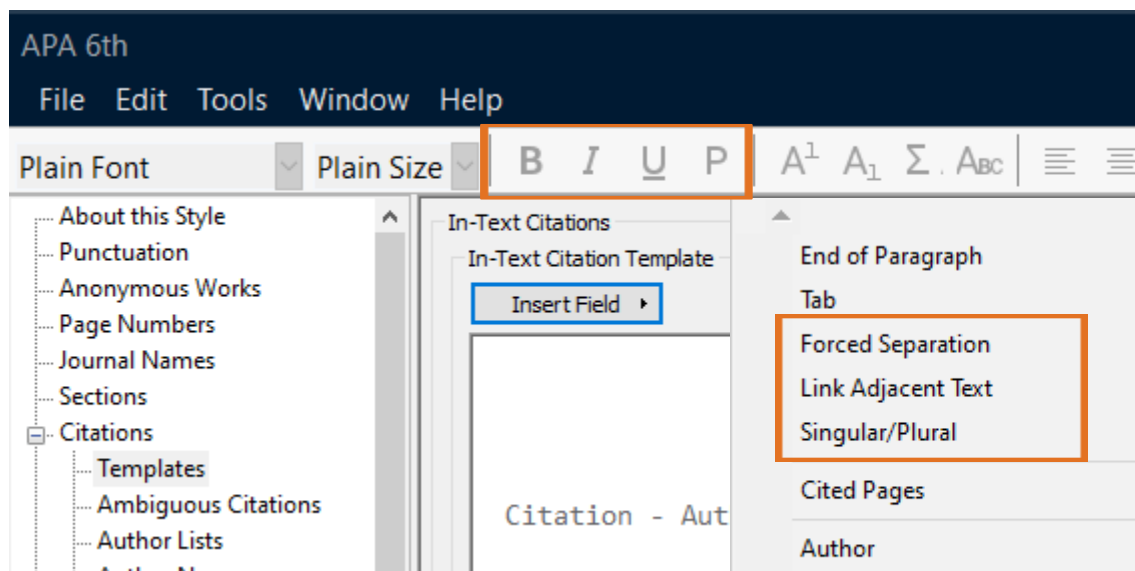


Figure 10: Operators for the definition of citation styles

Format-

## ting

If one piece of information is to be given a particular format, e.g., printed in italics, highlight the respective area and click on the appropriate formatting symbol at the top (Fig. 29).

In the section **Citation → Author Lists**, you can specify how to proceed with several authors. Should all or only the first x authors be named? And by which type of punctuation should several author names be separated from each other?

In the section **Citation → Author Name**, you specify how the author names should be displayed. Should first and middle names be mentioned? Should they be written out in full or abbreviated with initials? And in what order should they be named?

In the section **Citation → Sort Order**, you can specify the order in which the sources are given if you name several sources in one place.

## 6.2 The Entry in the Reference List

In the Bibliography section, select the item Templates to define sources in the reference list (Fig. 30). Define all document types (Reference Types) that you use in your work. To define a document type, select it in the Reference Types field (2). An empty field for the selected document type is displayed.

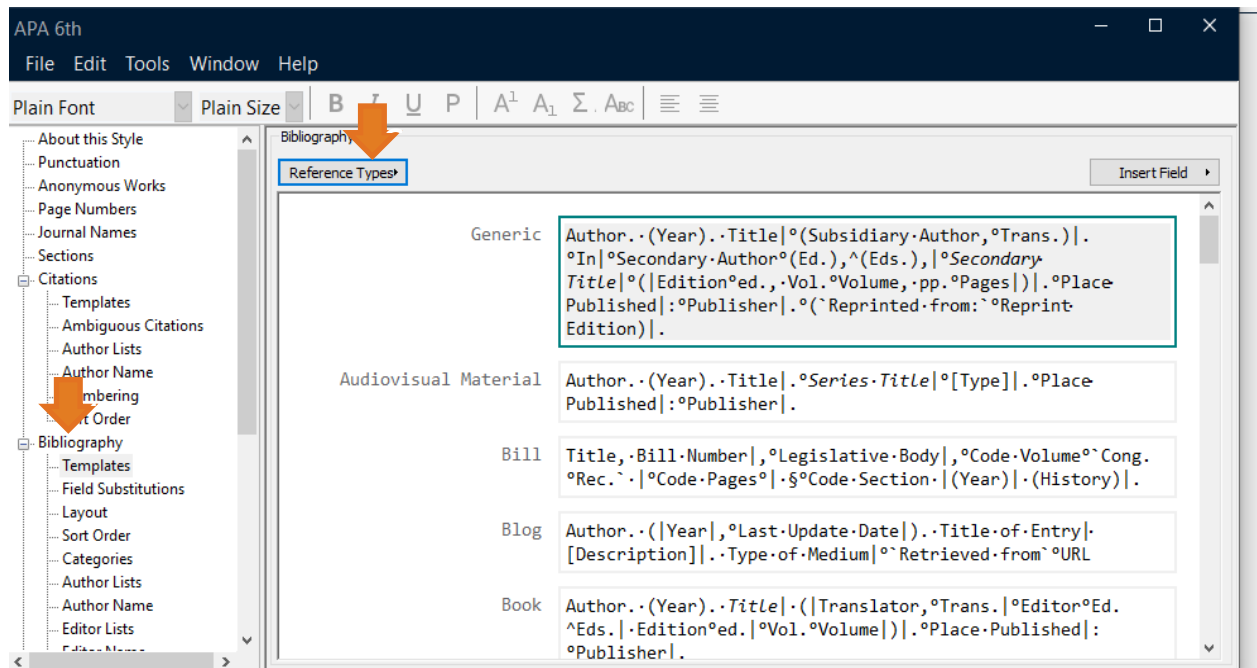


Figure 11: Defining the specification of different document types in the reference list

Use the Insert Field command (top right) to insert all the fields you need. Create your definition according to the description in chapter 6.1.

You also have additional options for the reference list in which you can specify how authors' and editors' names are to be displayed, how the reference list should be sorted, and the like.

## 6.3 Capitalization in the Reference list

You may have noticed that there are databases that import titles or authors in uppercase letters. If you want the titles and authors to be consistent in your reference list, there are several ways to achieve this.

### 6.3.1 Capitalization in Titles

This feature changes the case of titles for all cited references. It does not affect the view in EndNote, but only the output in the reference list.

To do this, edit your citation style in the menu **Tools → Output Style → Open Style Manager**. Choose your citation style and click Edit.

Under the heading Bibliography, you will find the item **Title Capitalization** (Fig. 31).

Select whether the title should be specified in the reference list as it was entered in EndNote, in the headline style (all words capitalized except for articles and prepositions), or in the sentence style

(first word in uppercase, otherwise only uppercase nouns).

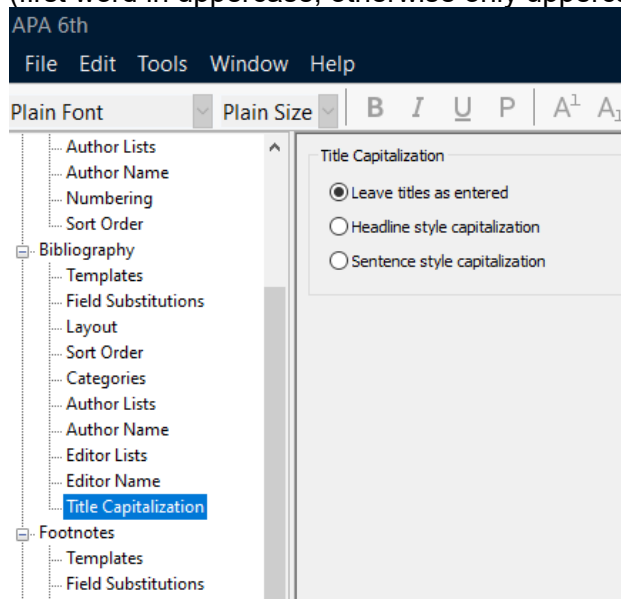


Figure 12: The capitalization in the citation style

## 6.3.2 Capitalization of Author and Editor Names

You can indicate directly in the citation style how author and editor names should be displayed.

To do this, edit your citation style in the menu *Tools* → *Output Style* → *Open Style Manager*. Choose your citation style and click *Edit*.

Under the headings Citations, Bibliography, and Footnotes, you will find the items Author Name and Editor Name.

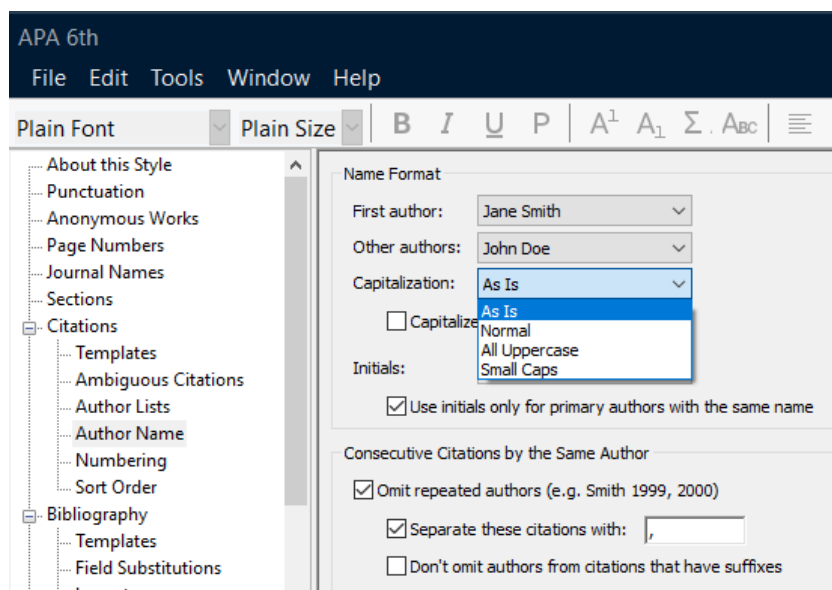


Figure 13: Setting the capitalization of author names

Use the drop-down menu Capitalization to choose how the names appear in the reference list, in-text citation, or footnote (see Fig. 32).

## 7 Collaboration and Synchronization with EndNote Web

EndNote Web is a web-based reference management program that enables location- and computer-independent work and collaboration. TUM members can use EndNote Web both in conjunction with EndNote Desktop and without a desktop version.

### 7.1 Activating EndNote Web

If you have already installed EndNote Desktop, you can, as long as you are connected to the Internet, create your EndNote Web Account directly from within EndNote Desktop. To do this, go to the item *Preferences* in the *Edit* menu, go to *Sync*, and click on the button *Enable Sync*. Follow the instructions. Create your account with your TUM e-mail address. Alternatively, you can go there via **Library > Sync** or click on **Sync Configuration** on the left in the program.

In EndNote Web, you also have the option to download the EndNote Web plug-in, which helps you to capture web pages quickly.

If you already have an EndNote Web account when installing EndNote Desktop, you can also incorporate it directly at that point.

In order to use EndNote Web without EndNote Desktop, go to the Web of Science database, follow the link to EndNote in the *Tools* menu, and create an EndNote Web account using your TUM e-mail address.

### 7.2 Synchronization between EndNote Desktop and EndNote Web

You can transfer data from your computer to your EndNote Web account as well as, conversely, copy it from your EndNote Web account to your computer.

If you want to synchronize data between different devices, synchronization will always occur via EndNote Web. The data transfer is triggered by the end device in use.

All references, including full texts, Group Sets, and all types of groups, are synchronized. Group Sets, Smart, and Combined Groups are not displayed in EndNote Web; however, after the synchronization to another end device, they reappear in EndNote.

Since everything is always transferred during synchronization, it is advisable to create one single EndNote library in total. If you work on several projects, it makes sense to organize the projects using Group Sets and groups.

In addition to synchronization between your own devices, groups, and libraries can also be shared with other EndNote users. What is shared varies. Here is an overview (Fig. 34):

|                    | EndNote<br>Online | Desktop | Shared<br>Group | Shared<br>Library |
|--------------------|-------------------|---------|-----------------|-------------------|
| References         | ✓                 | ✓       | ✓               | ✓                 |
| Custom Groups      | ✓                 | ✓       | ✓               | ✓                 |
| Smart Groups       | ✗                 | ✓       | ✗               | ✓                 |
| Combined<br>Groups | ✗                 | ✓       | ✗               | ✓                 |
| Group Sets         | ✗                 | ✓       | ✗               | ✓                 |
| PDFs               | ✓                 | ✓       | ✗               | ✓                 |

Figure 14: Overview of synchronization and sharing options

## 7.3 Sharing a Group

As with the Custom Groups in EndNote Desktop, you can also create groups here. You can share them with up to 1,000 other EndNote Web users, to whom you individually assign either read-only or read-and-write permissions.

To share a Group with others in EndNote Desktop, (from EndNote X9 onwards)

1. go with your cursor to the group you want to share and right-click to open the context menu. Choose **Share Group**.
2. in the section **Invite More People**, insert the e-mail addresses of the people you want to share your group with.
3. for each person, choose whether they shall have read-only or read-and-write access. you may enter a personal note to the recipient in the field **Add a Message**. The e-mail address does not have to be the one the other person registered their EndNote Web account with.

To share a group with others in EndNote Web,

1. go to **Manage My Groups** in the **Organize** menu,
2. create a new group or select an already existing group whose entries you wish to share and go to the **Manage Sharing** button.
3. Now add collaborators and assign the desired editing rights. To add collaborators, you need the e-mail address with which the person created their EndNote web account. Note, however, that you cannot share file attachments (e.g., PDFs).

Your shared groups are displayed as such in your own library after synchronization, while a shared library appears as a new library for the others (see Chapter 7.4). Groups others shared with you are displayed in your EndNote Desktop under the heading **Groups shared by others**. First the e-mail address of the group's owner is displayed, then the name of the group (s. Fig. 36). The name is linked to the shared group in EndNote Web. Clicking on the title will open the group in EndNote Web. However, you will no longer see in EndNote Desktop how many references are stored in the group or which references are included.

## 7.4 Sharing an EndNote Library

You can share your entire EndNote Library with up to 100 other EndNote Web users. References, full texts, and groups are shared. Up to EndNote X8, all collaborators have full editing rights. From X9 onwards, you can also assign a read-only right.

To invite others to share your library, open the library in your desktop version and click Share in the *File* menu. In the following dialog box, enter the e-mail addresses of all persons with whom you wish to share your library. This does not have to be the e-mail address with which the other person created their EndNote web account. Furthermore, you define whether the person should have read-only or read-and-write access. Invitees receive an invitation via e-mail, which they must accept before they can access your library.

As long as the invitation has not yet been accepted, the status will be indicated as Pending; once the invitation has been accepted, it will change to Member.

You can share only one library of your own, but you can use any number of other libraries to which you have been invited by others. To edit someone else's library, choose the command Open Shared Library in the File menu in EndNote. Depending on your rights, you can now either read or read and edit the library as usual.

Libraries shared with you are only visible in your desktop version, not in your EndNote web account.

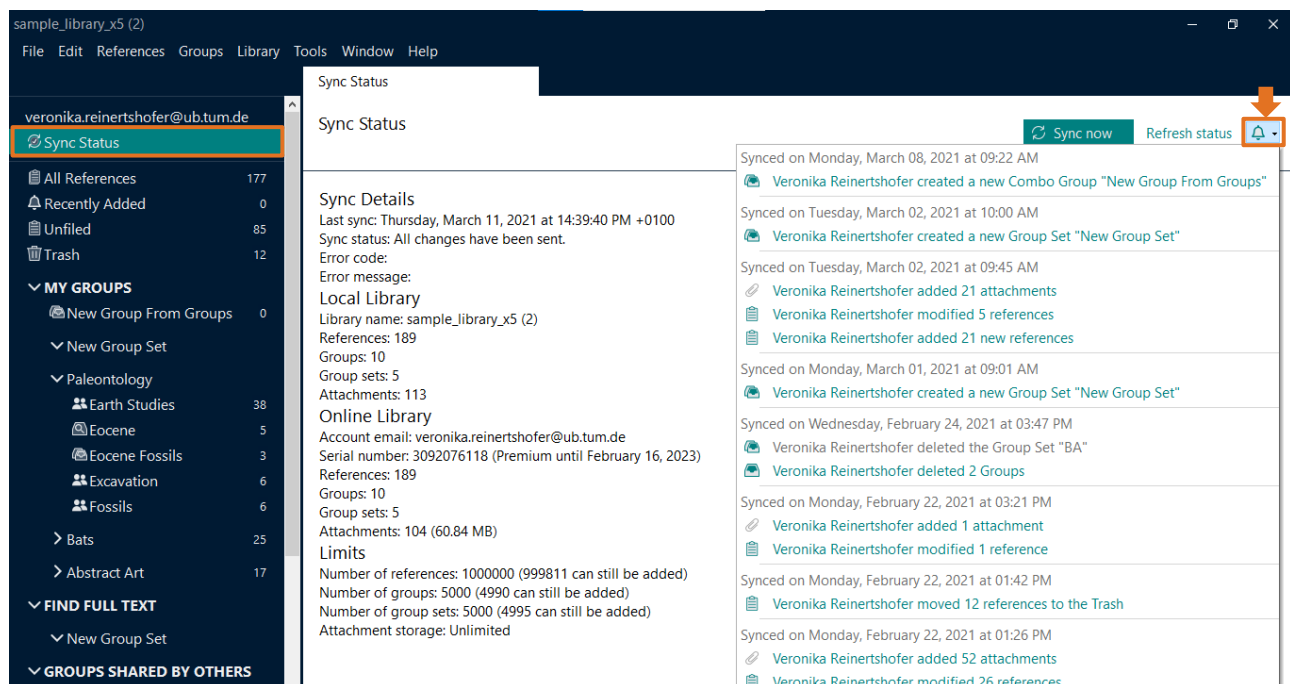


Figure 15: Activity Feed

Changes made in a shared library can be tracked via the Activity Feed (see Fig. 38). The last 500 changes are displayed.

## 7.5 CWYW for EndNote Web

In the Cite While You Write Preferences, choose whether to allow CWYW to access EndNote Desktop or your EndNote Web Library. In the tab Application, choose EndNote online instead of EndNote and confirm with OK.

## 7.6 Collaborative Use of the EndNote Library with the Desktop Version

An EndNote Library is not designed to be edited by more than one person at a time. Even if the file is stored on a shared drive, it can only ever be edited by one person. For all others, the file is locked. Even a read-only copy cannot be opened in this case.

However, the following solution would be conceivable: There is a team member who has stored and maintained the EndNote Library locally on their computer or drive. They save a read-only copy of the library on the shared drive for all colleagues to view and regularly replace it with the updated file. The team members can open the read-only file simultaneously and are able to search in it, create bibliographies, copy datasets, and cite in Word.

## 7.7 Compatibility with Programs like Evernote, Scrivener, etc.

In contrast to Microsoft Word and also the OpenOffice Writer for Windows, there is no Cite While You write plug-in (CWYW) for other programs. If you work with another program, such as Scrivener, you have the following options:

If you would like to add a source to your text, mark the corresponding entry in EndNote and copy it into your text via Ctrl+C/Ctrl+V. In your text-processing program, the citation will look like this: {Author's Last Name, Year #EndNote ID}. Once you have finished writing your work and inserting all the sources, save your text as a .rtf or .odt file.

You can then feed them into EndNote via the menu **Tools → Format Paper**. A dialog box opens in which EndNote displays all the citations it can match (Fig. 40). Use the Output Style drop-down menu to specify in which citation style the citations and reference list are formatted. Then click on *Format* and select location, file format, and file name.

The temporary citations in curly brackets are replaced, and the reference list is created. Unlike in Word, this reference list is not automatically updated when you insert a new reference, since it consists of static text, not active field functions. If you want to add or change citations at a later date, please use your original text, which still contains the citations in curly brackets. Otherwise, you will be provided with a second reference list when reformatting. Adapt this text and format the document again.

## 8 Manuscript Matcher – How Do I Find an Appropriate Journal for my Article?

Via the EndNote web account, EndNote allows you to search for journals appropriate to the contents of your article, to which you can then submit it. This feature is called Manuscript Matcher. You can find the feature in your EndNote Web Account via the menu Match (Fig. 41).

There, you enter the title and abstract of your article. Including your references is not mandatory, but allows a much better search result. If you have collected your references in a group in EndNote Web, select this group in the field References (Fig. 42).

EndNote Desktop: Menu Groups > Manuscript Matcher. For this function to be active you need to have selected a group.

Word Add-in: EndNote toolbar > Manuscript Matcher (see Fig. 43)

Starting the Manuscript Matcher from EndNote desktop or Word, the references from the selected group or the Word document are automatically transferred. On the basis of the title, the abstract, and possibly the sources, the Manuscript Matcher searches the Web of Science for journals in which similar articles are published. The result might appear as in e.g., Fig. 44:

You will receive up to ten suggestions. For each journal, you can see how well keywords in your paper coincide with the journal's content (1), the Impact Factor (2), and the specialist area this journal can be associated with (3). You will receive information about the publisher of the journal (4), a link to the homepage where you can find further information (5), and a direct link to submit your article to the respective journal (6). In Fig. 42, you can also see that Open Access journals are marked as such (7). You can find a video about the Manuscript Matcher here:

<https://youtu.be/rt0rT0wemrI>.

Please note that this does not guarantee that your article will be accepted.

Clarivate Analytics | EndNote

Meine Referenzen | Erfassen | Organisieren | Format | Übereinstimmung | Optionen | Herunterladen

Suchen Sie nach den am besten zu Ihrem Manuskript passenden Zeitschriften Powered By Web of Science

8 Übereinstimmende Zeitschriften

< Manuskriptdaten bearbeiten | Alle erweitern | Alle reduzieren

| Übereinstimmungsbreite                                                                                                                                                                                                                                                                                                                  | JCR Impact Factor<br>Aktuelles Jahr   5 Jahre | Zeitschrift | Ähnliche Artikel                                                                                       |         |        |    |                      |       |    |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------|-------------|--------------------------------------------------------------------------------------------------------|---------|--------|----|----------------------|-------|----|
| 2.392   2.749<br>2019   5 Jahre                                                                                                                                                                                                                                                                                                         | ECOLOGY AND EVOLUTION                         | 0           | <p>Was das hilfreich?<br/>✓ JA ✗ NEIN</p> <p>Abenden &gt;&gt;</p> <p>Zeitschriftenangaben &gt;&gt;</p> |         |        |    |                      |       |    |
| <p>Rangliste der wichtigsten Schlüsselwörter</p> <ul style="list-style-type: none"> <li>occupancy modeling</li> <li>bat flight activity</li> <li>site occupancy</li> <li>bat research</li> <li>flight activity levels</li> </ul>                                                                                                        |                                               |             |                                                                                                        |         |        |    |                      |       |    |
| <p>JCR-Kategorie    Rang in der Kategorie    Quartil in der Kategorie</p> <table border="1"> <tr> <td>ECOLOGY</td> <td>71/169</td> <td>Q2</td> </tr> <tr> <td>EVOLUTIONARY BIOLOGY</td> <td>28/51</td> <td>Q3</td> </tr> </table> <p>Herausgeber:<br/>111 RIVER ST, HOBOKEN 07030-5774, NJ<br/>ISSN: 2045-7758<br/>eISSN: 2045-7758</p> |                                               |             |                                                                                                        | ECOLOGY | 71/169 | Q2 | EVOLUTIONARY BIOLOGY | 28/51 | Q3 |
| ECOLOGY                                                                                                                                                                                                                                                                                                                                 | 71/169                                        | Q2          |                                                                                                        |         |        |    |                      |       |    |
| EVOLUTIONARY BIOLOGY                                                                                                                                                                                                                                                                                                                    | 28/51                                         | Q3          |                                                                                                        |         |        |    |                      |       |    |
| 2.379   2.81<br>2019   5 Jahre                                                                                                                                                                                                                                                                                                          | PEERJ                                         | 0           | <p>Was das hilfreich?<br/>✓ JA ✗ NEIN</p> <p>Abenden &gt;&gt;</p> <p>Zeitschriftenangaben &gt;&gt;</p> |         |        |    |                      |       |    |
| 2.878   3.419<br>2019   5 Jahre                                                                                                                                                                                                                                                                                                         | ECOSPHERE                                     | 0           | <p>Was das hilfreich?<br/>✓ JA ✗ NEIN</p> <p>Abenden &gt;&gt;</p> <p>Zeitschriftenangaben &gt;&gt;</p> |         |        |    |                      |       |    |
| 4.711   5.278<br>2019   5 Jahre                                                                                                                                                                                                                                                                                                         | BIOLOGICAL CONSERVATION                       | 1           | <p>Was das hilfreich?<br/>✓ JA ✗ NEIN</p> <p>Abenden &gt;&gt;</p> <p>Zeitschriftenangaben &gt;&gt;</p> |         |        |    |                      |       |    |

## 9 Further Import Options

In addition to what the EndNote Introductory Course has already shown as options for importing preferences into EndNote (manual, export from the online catalog, export from databases, online search via EndNote), there are further import options. For example, Endnote offers a bookmarklet to quickly add Internet sources, while Google Scholar provides a special download link for the import into Endnote.

### 9.1 Import from Google Scholar

In Google Scholar, you have the option to obtain a direct link to the import of references in End-Note (see Fig.47).

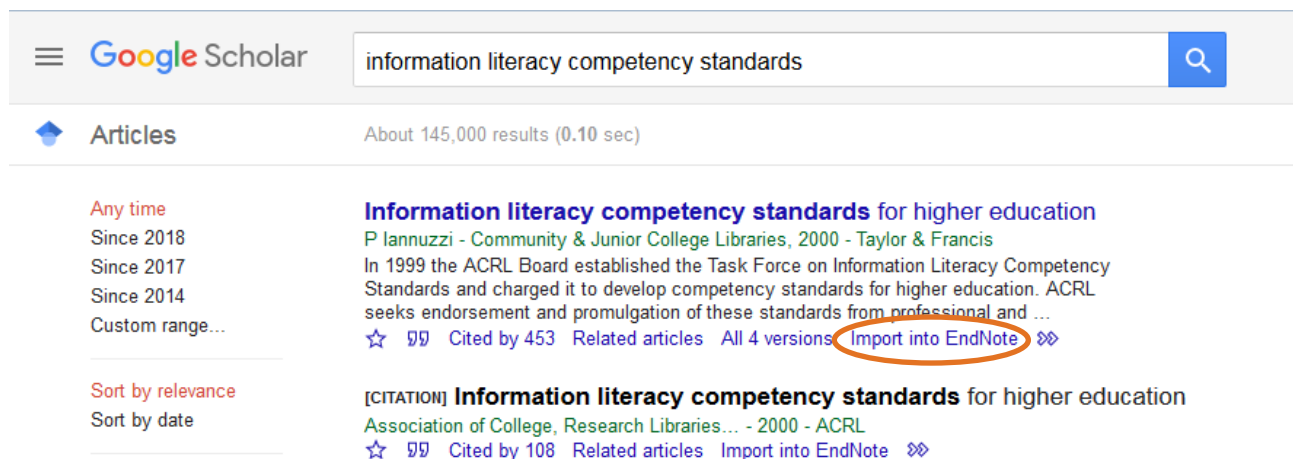
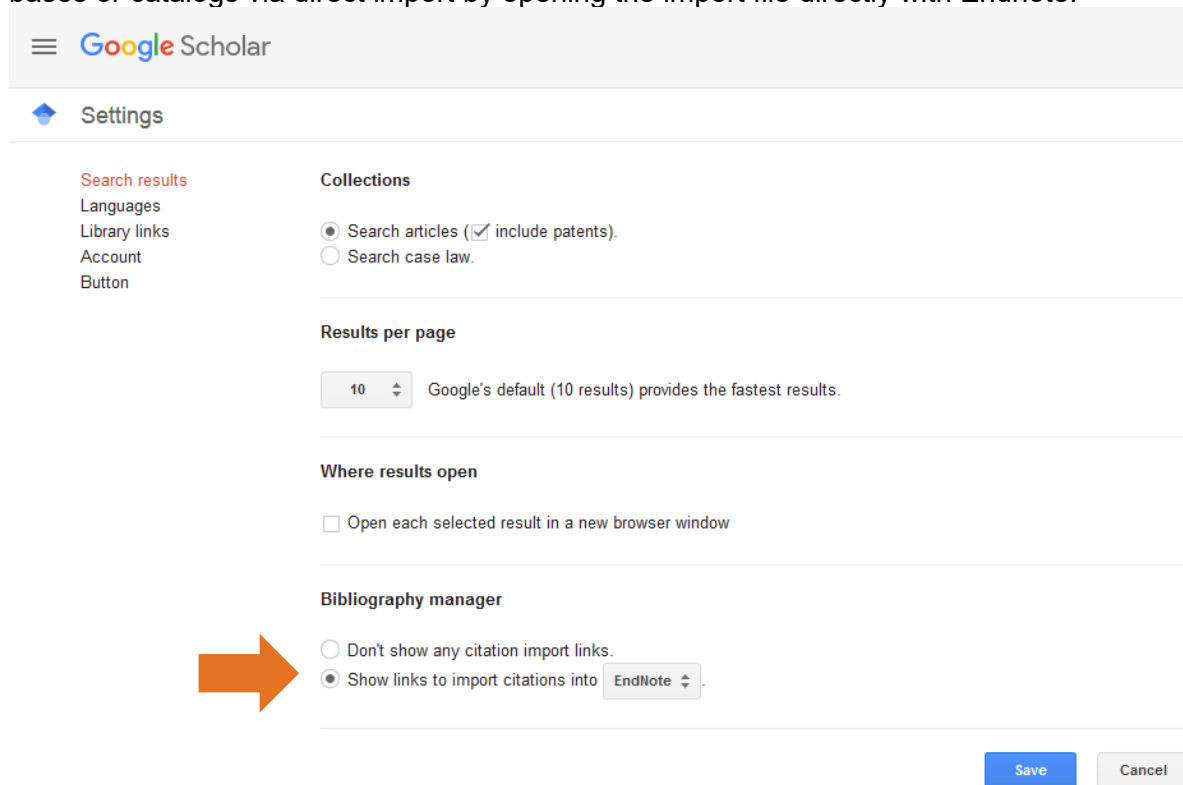


Figure 16: EndNote import link in Google Scholar

To set this up, go to Google Scholar's Settings and then to the tab Search Results. Under Bibliography Manager, select Show links to import citations into EndNote (Fig. 48). Select EndNote from the drop-down menu. Save the changed settings. During your next search, you will see a link below each title, which allows direct import to EndNote. Import the data just as you import from databases or catalogs via direct import by opening the import file directly with Endnote.



The screenshot shows the Google Scholar Settings page. The left sidebar contains a menu with 'Settings' selected. The main content area is divided into sections: 'Search results' (with links to Languages, Library links, Account, and Button), 'Collections' (with radio buttons for 'Search articles (include patents)' and 'Search case law'), 'Results per page' (with a dropdown set to 10), 'Where results open' (with a checkbox for 'Open each selected result in a new browser window'), and 'Bibliography manager'. In the 'Bibliography manager' section, the radio button 'Show links to import citations into' is selected, and the dropdown menu next to it is set to 'EndNote'. An orange arrow points to this section. At the bottom right, there are 'Save' and 'Cancel' buttons.

Figure 17: Setting up the EndNote import link in Google Scholar

## 10 Contact and Support

If you have any questions about EndNote, you can get help and support in a number of ways:

### 10.1 Help from EndNote

#### **Manual**

Within the program, you can find the EndNote manual via the shortcut F1.

#### **Technical support**

You can get technical support via: <https://support.clarivate.com/s/>

### 10.2 Help from the TUM

If you have questions, you are also very welcome to contact the university library: [workshop@ub.tum.de](mailto:workshop@ub.tum.de)

#### **Video Tutorials and Lecture Notes**

Video tutorials and scripts can also be found in our E-Course at:

<https://www.ub.tum.de/en/ecourse/reference-management-with-endnote-advanced-course>

#### **TUM Citation Guide**

If you have questions about citing, the TUM Citation Guide can help: <https://media-tum.ub.tum.de/1225458>

#### **Reference Management and Citation Consulting by the TUM University Library**

In addition to our reference management courses, we also offer reference management consulting, where individual questions can be discussed (online, by phone, or in person).

To make an appointment see <https://www.ub.tum.de/en/consultation-citation>

### 10.3 Miscellaneous

To safeguard your data, do regular backups. You have two options for this: Either save your data in the form of a compressed library in .enlx format or export the library in .txt, .rtf, .htm or .xml format. Both options can be found in the File menu.

#### **Connection Files, Import Filters & Output Styles**

You can customize your own installed copy of EndNote according to your needs.

#### **Connection Files\***

Connection files to additional catalogs and databases can be downloaded from the EndNote website: <http://www.endnote.com/support/enconnections.asp>

#### **Import filters\***

Downloads for additional import filters are also available on the EndNote website: <http://www.endnote.com/support/enfilters.asp>

## **Updates**

EndNote updates are available at: <http://endnote.com/downloads/available-updates>

Please note that you must first uninstall EndNote before installing a newer version.

## **Output Styles (Citation Styles)**

Additional citation styles are available at: <http://www.endnote.com/support/enstyles.asp>

## **Contact**

### **Technical University of Munich**

University Library

Arcisstraße 21, 80333 Munich

Tel. +49 89 189 659 220

[workshop@ub.tum.de](mailto:workshop@ub.tum.de)

[www.ub.tum.de](http://www.ub.tum.de)

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