Lecture Notes for the Course
Reference Management with Endnote
– Advanced Course –
Table of Contents

1 Contents of the EndNote Introductory Course ................................................................. 4
2 Handling PDFs in EndNote ................................................................................................. 4
  2.1 Annotating PDFs ............................................................................................................ 4
  2.2 Importing PDF Files ....................................................................................................... 5
  2.3 Auto Import Folder ......................................................................................................... 6
  2.4 Renaming PDF Attachments ......................................................................................... 6
  2.5 Find Full Texts ............................................................................................................... 7
3 Organising and Finding References in EndNote ............................................................... 9
  3.1 Displayed Columns ........................................................................................................ 9
  3.2 Rating & Read/Unread Status ....................................................................................... 10
  3.3 Groups .......................................................................................................................... 10
     3.3.1 Group Sets ............................................................................................................. 10
     3.3.2 Custom Groups ..................................................................................................... 11
     3.3.3 Smart Groups ....................................................................................................... 11
     3.3.4 Combined Groups ............................................................................................... 11
  3.4 Keywords ...................................................................................................................... 12
  3.5 Term Lists ...................................................................................................................... 12
  3.6 How Does EndNote Deal with Duplicates? ................................................................. 13
  3.7 Searching within EndNote ............................................................................................ 13
     3.7.1 Quick Search & Search Panel ............................................................................... 14
     3.7.2 Saving Searches or Converting Them into Smart Groups ................................ 14
     3.7.3 Searching Multiple EndNote Libraries .............................................................. 14
4 Citing with EndNote’s Word Add-In CWYW (Cite While You Write) ............................... 15
  4.1 Inserting Citations ......................................................................................................... 15
  4.2 Adding Footnotes ........................................................................................................... 16
  4.3 Adding Page References ............................................................................................... 16
  4.4 Formatting Reference Lists - Changing Citation Styles ............................................. 16
  4.5 Grouping Reference Lists ............................................................................................ 16
  4.6 Changing EndNote Style Sheets in Word .................................................................... 17
  4.7 The Travelling Library ................................................................................................. 19
  4.8 Showing Cited References in EndNote? ...................................................................... 20
  4.9 Faster Speed in Word – Instant Formatting ................................................................. 20
5 Creating Bibliographies by Keywords, Authors or Years ............................................... 20
6 Changing and Creating Citation Styles ......................................................................... 22
  6.1 In-Text Citations and Footnotes .................................................................................... 24
  6.2 The Entry in the Reference list ...................................................................................... 26
  6.3 Capitalisation in the Reference list ............................................................................... 27
     6.3.1 Capitalisation of Individual Fields ........................................................................ 27
     6.3.2 Capitalisation in Titles ......................................................................................... 28
     6.3.3 Capitalisation of Author and Editor Names ....................................................... 28
7 Collaboration and Synchronisation with EndNote Web .................................................. 29
  7.1 Activating EndNote Web ............................................................................................... 29
  7.2 Synchronisation between EndNote Desktop and EndNote Web ............................... 30
  7.3 Sharing a Group ........................................................................................................... 30
7.4 Sharing an EndNote Library ................................................................. 31
7.5 CWYW for EndNote Web ...................................................................... 33
7.6 Collaborative Use of the EndNote Library with the Desktop Version ....... 33
7.7 Compatibility with Programs like Evernote, Scrivener, etc...................... 33
8 Manuscript Matcher – How Do I Find an Appropriate Journal for my Article? 34
9 Further Import Options .............................................................................. 36
  9.1 EndNote Capture Bookmarklet ............................................................. 36
  9.2 Import from Google Scholar .................................................................. 38
10 Contact and Support .................................................................................. 39
  10.1 Help from EndNote ............................................................................. 39
  10.2 Help from the TUM ............................................................................ 39
  10.3 Miscellaneous ...................................................................................... 39

We appreciate your feedback.

This script is updated regularly. If you nevertheless 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 to work-shop@ub.tum.de.

The current version of this script can always be found under the following link: https://media-tum.ub.tum.de/1342402
1 Contents 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 catalogue, import from a database, importing references into EndNote via the online search function)
- Basic knowledge of how to organise references into groups in EndNote and how to find references in one's own library via the search function in EndNote
- Working with the Word add-in (inserting references into Word and formatting reference lists in a chosen citation style)

The current lectures notes for the EndNote introductory course can be found here: https://mediatum.ub.tum.de/node?id=1100719

2 Handling PDFs in EndNote

In EndNote’s integrated PDF viewer, you can read and annotate PDFs (Fig. 1). You can add comments to the PDF which you can later search using the search function in EndNote. You can also change the often meaningless filenames of downloaded PDFs to descriptive names. In addition, EndNote provides a feature to search the web for freely available full texts or to import PDFs already stored on your computer into EndNote.

2.1 Annotating PDFs

In the preview area (Fig. 1), your PDF document will be displayed in the PDF tab (1). Use the button Open PDF (2) to open the PDF in a new window. Both in the preview area and in the fullscreen view, you can add comments and highlights to your PDF (3).

Highlighted text passages, underlined text, crossed out text (Strikeout Text), and comments (Sticky Note) that you make in EndNote's PDF Reader will also be displayed when you open the document in Adobe Acrobat Reader. If you make further changes via Acrobat Reader, make sure to replace the existing linked file when saving. Otherwise, a copy of the file is created which is not linked to the dataset in EndNote.

Comments and highlights are taken over during the synchronisation with EndNote Web; also to the iPad app, starting from EndNote version X7.1.
Within EndNote, the search categories Any Field + PDF, PDF with Notes, PDF, and PDF-Notes provide both the possibility to search for your own comments and to search the PDF's full text. This only applies to PDF documents that are machine-readable. Scanned texts that have not been edited with OCR recognition cannot be searched.

2.2 Importing PDF Files

In EndNote you have the option of importing an entire folder including subfolders containing PDFs. From the menu choose File => Import => Folder. The Import Folder dialogue box will open (Fig. 2). In the field Import Folder select the desired folder from your computer. In the Duplicates field, select how duplicates are to be handled.

You also have the option of including subfolders and have a Group Set created for this folder. If your selected folder contains subfolders, these are taken over as Custom Groups.

After importing - if you have selected this option - the imported folder will be displayed as a Group Set in the navigation of your local library. Any subfolders are taken over as Custom Groups. Otherwise, the PDFs will appear in the Imported References folder.

You may find 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 is a scanned PDF and not machine-readable, EndNote uses the document's metadata as title data. In many cases, only the name of the file is available here (see Fig. 3).

<table>
<thead>
<tr>
<th>Rating</th>
<th>Author</th>
<th>Title</th>
<th>Year</th>
<th>Journal</th>
<th>Ref Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Chure, Daniel B.; Brett, Brooks B.; White, Adam F., et al.</td>
<td>Concentration of sunlight to solar surface levels using...</td>
<td>2019</td>
<td>Nature...</td>
<td>Journal Article</td>
</tr>
<tr>
<td></td>
<td>Kamarazaman, Suhairi; Kair, Kiran</td>
<td>Quality Management of Reference Services in Malaysia...</td>
<td>2019</td>
<td>Libri Journal</td>
<td>Journal Article</td>
</tr>
<tr>
<td></td>
<td>Arnauf, Theresa S.</td>
<td>Reference service without the desk</td>
<td>2010</td>
<td>Reference Serv...</td>
<td>Journal Article</td>
</tr>
<tr>
<td></td>
<td>Koevev-Weidinger, Elizabeth Ben...</td>
<td>Why and how to mystery shop your reference desk</td>
<td>2010</td>
<td>Reference Serv...</td>
<td>Journal Article</td>
</tr>
</tbody>
</table>

Figure 3: List of imported PDF titles

In this case, subsequent editing of the data is required. Look at the PDF in the preview. 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 which EndNote added automatically.
2.3 Auto Import Folder

In addition to manually importing PDFs or folders of PDFs, you can also specify a folder from which new PDFs are 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 (Fig. 4).

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

![Figure 4: Setting up Auto Import Folder](image)

2.4 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 (Fig. 5).
2.5 Find Full Texts

With the command Find Full Text in the References menu, EndNote automatically searches for freely available full texts. This function can also be found in the context menu (right-click, Fig. 6).

Select all references which are to be included in the full-text search. EndNote can search for a maximum of 150 titles.

In order to always save a copy of the file in the EndNote Library, choose Preferences from the Edit menu. Under the item URLs and Links, check the box Copy new file attachments to the default file attachment folder and create a relative link. Like that, even if you move the original files where EndNote would not find it, you still have the data at hand.

To avoid having to re-run the Find Full Text search every time you add new references to your library, you can automate this. Select Edit => Preferences => Find Full Text and check the box Automatically invoke Find Full Text on newly imported references (see Fig. 7).

In order to be able to use the function Find Full Text also to retrieve full texts licensed by the TUM, go to the item OpenURL Path in the menu Edit => Preferences => Find Full Text and enter this URL: http://sfx.bib-bvb.de/sfx_tum (Fig. 7).
If you are not logged into the campus network or you use a VPN client, add the URL https://eaccess.ub.tum.de/login under the heading Authenticate with. This allows you to search outside the campus network for full texts licensed by the TUM.

In this case, when you call up the Find Full Text function, you will first be directed to the TUM's eAccess Log-in page. Here, authenticate yourself with your TUM ID (TUM email address + password), click on Log-in and then Continue.

Note that you will not be able to find all the licensed electronic full texts available at the TUM. If the Find Full Text search does not yield any results, it thus makes sense to do an additional search in the licensed databases at TUM (access via DBIS). If you search for licensed full texts, you may also experience longer search times.

If you want to cancel the full-text search, click on the status Searching under the item Find Full Text in the navigation (Fig 8). Pause or cancel the search.
Full texts in EndNote Web / Online

Full texts can either be saved directly in EndNote Web or added and synchronized with other devices via the synchronisation feature.

While you can share your references via EndNote Web with other EndNote Web users, this is not possible for full texts up to and including version X7.1. Only version X7.2 offers this option.

3 Organising 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 the search 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 through drag and drop (Fig. 9).

Figure 9: Sorting and moving columns
By right-clicking on a column header, you choose which information should or should not be displayed (Fig. 10).

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 reference you have already read and which you have not, EndNote offers the Read/Unread category. Unread references are shown in bold and have a small gray dot in the Read/Unread category, ones already read are displayed in normal font and marked with a small white dot.

3.3 Groups

EndNote makes it possible to subdivide the data into groups and differentiates between Custom Groups, Smart Groups and Combined Groups (see Fig. 11). To Custom Groups you assign datasets manually. The Smart Groups are based on a search query you have created and are updated automatically. The Combined Groups (From Groups) combine the titles of several Custom and Smart Groups. They, too, are updated automatically. Content-related groups can be bundled into Group Sets. Group Sets are headlines that bundle several groups, they themselves contain no references.

3.3.1 Group Sets

To create a Group Set:

1. From the Groups menu, select the command Create Group Set.
2. Assign a name to the new Group Set.

### 3.3.2 Custom Groups

To create a Custom Group:

1. Right-click on the Group Set in which you want to create the Custom Group.
2. Open the context menu and select *Create Group*.
3. Assign a name to the new Custom Group.

To include data into a Custom Group:

1. Select the datasets in the overview.
2. Drag and drop the datasets into the desired group or select the desired datasets, then go to *Add References To* in the context menu and select the desired Custom Group.

### 3.3.3 Smart Groups

To create a Smart Group:

1. Right-click on the Group Set in which the Smart Group is to be created.
2. Open the context menu and select the command *Create Smart Group*.
3. Assign a name to the new Smart Group.
4. In the opened search mask, enter your search strategy for the Smart Group and click the *Create* button. Here you can combine any criteria with each other; including Keywords, Rating, Year, etc.

### 3.3.4 Combined Groups

To create a Combined Group:

1. Right-click on the Group Set in which you want to create the Combined Group.
2. Open the context menu and select the command *Create From Groups*.
3. Assign a name to the new Combined Group.
4. Indicate from which Custom and/or Smart Groups you want to combine titles in your new Combined Group.
5. If you want to change the search query for the Smart Group again, click on the Smart Group and select *Edit Group* in the context menu.

**CAUTION**

A dataset can belong to several groups, but it is still saved only once in the database. If a dataset is removed from the Custom Group, it will not be entirely deleted from the EndNote Library but only from the Custom Group.

On the other hand, if you delete a title from a Smart Group or a Combined Group, it will be entirely deleted from the library without any prior warning! Until you close EndNote, you will find the deleted records in the *Trash* folder.
**How do I know which groups a reference is assigned to?**
Select the respective reference and choose *Record Summary* from the context menu. All groups assigned to this reference are displayed. There is no distinction between Custom and Smart Groups.

### 3.4 Keywords

In order to have your literature on a certain topic quickly to hand, it makes sense to assign descriptive terms - so-called Keywords. You can search EndNote for these Keywords, with the result that you find your references even if the topic is named differently in the title or does not appear in the title at all. You can use them as criteria for Smart Groups and create corresponding bibliographies.

You can assign any number of Keywords to a dataset. Enter the keywords in the *Keyword* field, each one in a new line. EndNote collects all keywords in a *Term List*. With the Term List you always have a good overview of which keywords you have already used.

The Term List can be opened with the key combination *Ctrl + 1*, if the cursor is in the keyword field, or via the menu *Tools => Open Term Lists => Keywords Term List*.

### 3.5 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 quite common that an author whose works are imported from different databases is 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 recognise a new entry by the red font color). 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*.

Via the menu *Tools => 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.

3.6 How Does EndNote Deal with Duplicates?

In the EndNote Preferences, you specify whether and how EndNote checks your library for duplicates. To do this, go to the menu Edit => Preferences => Duplicates. Decide which fields should be considered in the duplicate check and how to deal with found duplicates.

From now on, EndNote will duplicate-check the imported references for existing entries in the open library.

Datasets which are added to the library via direct import are not checked. If you wish to check all datasets in your library for duplicates, select the command Find Duplicates in the References menu.

3.7 Searching within EndNote

You have two options in EndNote to search within your references. The Quick Search and the Advanced Search in the Search panel.
3.7.1 Quick Search & Search Panel

The *Quick Search* (Fig. 13) can be found in the toolbar (1). The *Search Panel* can be opened via the *Show Search Panel* (2) button in the toolbar or via the shortcut Ctrl + F.

![Figure 13: Search options in EndNote](image)

The *Quick Search* searches all fields in the library, including PDF full text and PDF comments. The term you are looking for is highlighted in color in the hit list. Enter one or more terms in the *Quick Search* field and press the *Enter* key. If you enter several terms, they are connected with AND. This search is useful for fast, general searches.

The *Search Panel* (Fig. 14) performs special searches. To this end, there are any number of search boxes on hand that you can use to search through a specific field, such as Author, Title, Keyword, etc. These search boxes can be combined with AND, OR, or NOT. You can add more search boxes via the + button to the right of the search slot. Again, a search in the entire library including full texts and PDF comments is possible.

![Figure 14: Search fields in EndNote](image)

3.7.2 Saving Searches or Converting Them into Smart Groups

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

3.7.3 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. 15).
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 Inserting Citations

1. Start Microsoft Word and open a new document.
2. In Word, open the EndNote commands in the EndNote X8 menu (Fig. 16).
3. Place your cursor where you want to insert a citation in the text and select Insert Citation.
4. Enter one or more search terms (e.g. the author, a keyword, or a term from the title of the source you want to cite) in the opening search window and click the Find button. All references that meet your search criteria will be displayed. This feature searches in all opened EndNote libraries. This is the only way to search for your references across libraries. If you want to display all the references you have saved in your EndNote Library, insert a * in the search field.
5. Select the reference(s) you wish to insert in the text and click the Insert button.
6. EndNote inserts the reference(s) in your document and creates the corresponding entry in the reference list in the selected style (Output Style).

CWYW is also available for the Open Office Writer in Windows, as well as for Apple Pages.

4.2 Adding Footnotes

If you want to use a footnote style, first set a footnote using the Word feature Insert footnote in the References menu. Then place the cursor in the footnote and select your reference, as described in Section 4.1., 2-6.

4.3 Adding Page References

The button Edit & Manage Citation(s) adds additional information such as page references for the cited source. If you were to include this information by hand in the reference within the text, EndNote would overwrite your additions during the next update of the document, as the in-text reference is a field function that is automatically matched to the EndNote Library.

4.4 Formatting Reference Lists - Changing Citation Styles

As soon as you insert the first reference into your text via the EndNote Word add-in, EndNote automatically creates a reference list at the end of the text document that is constantly updated.

Use the Style drop-down menu to select the desired citation style. Here you can see the most commonly used citation styles. With the button Select another style you can choose from all citation styles installed in EndNote. In addition to the citation styles installed in EndNote, there are many more styles to add via the EndNote website.

To add a new citation style, save the new style in the Styles folder (on Windows: C:\Program Files (x86)\EndNote X8\Styles).

Use the button Bibliography (also Configure Bibliography or Bibliography Settings) to determine the layout and heading of the reference list.

4.5 Grouping Reference Lists

Reference lists are usually sorted alphabetically or in the order in order of appearance. Sometimes, however, it is desirable 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 (see Fig. 17). Create the required categories using Configure Categories.
The categories (Categorie Headings) Primary Sources and Secondary Sources are already added. Use +Category Headings to create new categories (see Fig. 18). 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.

4.6 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've inserted the first source into your text using EndNote's
Word add-In, you'll find two additional style sheets in Word (see Fig. 19); the sheet *EndNote Bibliography* for the 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. 19).

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 (see Fig. 20).
4.7 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.
4.8 Showing Cited References in EndNote?

EndNote creates a temporary folder with the name of the Word file (Fig. 21). This can only be seen as long as the Word document is open and contains all sources cited up to this point.

4.9 Faster Speed in Word – Instant Formatting

If you notice that it takes a particularly long time 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 list at a later time, enable this feature again.

5 Creating Bibliographies by Keywords, Authors or Years

In order to create bibliographies by different criteria such as keyword, author or year, select Tools => Subject Bibliography in the menu.

In the Subject Fields dialogue 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, see Fig. 22). This means that works by more than one author are listed under each author name and thus multiple times in the list. Then click on OK.
In the following dialogue 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 (Fig. 23).

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*.

![Subject Terms](image)

Figure 23: Selecting keywords for reference lists

Your bibliography will be created and displayed in a preview window (Fig 24).
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 Edit => 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. 25, 1). You might have to change the view to preview using the button Style Info / Preview (2).

![Image of Style Manager with a preview window]

Figure 25: Output Style manager

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

If you wish to customise 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 features.

Figure 26: Output Style editor

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. 27). 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.
It is 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 displayed only if there is also a page number.

**Link Adjacent Text operator**

The Link Adjacent Text operator (Fig. 28) helps to link text elements and field content. The text element is displayed only if the database field also has content. In Fig. 27 this operator is represented by a diamond-like symbol. Likewise, punctuation marks are linked with their subsequent elements. A Link Adjacent Text operator always sets a whitespace automatically. The Link Adjacent Text operator can be found e.g. between the indication pp. and the field *Cited Pages*. Whitespaces are represented by a simple dot at the center of the line height (following e.g. the comma after the author’s name).
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 \texttt{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 continues to write after it. To stay with the example of the page reference in Fig. 25, with an empty \texttt{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 \texttt{p./pp} 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 (upside down circumflex), while the plural version is given behind it.

Formatting
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. 28).

In the section \texttt{Citation => Author Lists} you can specify how to proceed with several authors. Should all or only the first \textit{x} authors be named? And by which type of punctuation should several author names be separated from each other?

In the section \texttt{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 \texttt{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 \texttt{Bibliography} section, select the item \texttt{Templates} to define the specification of entry in the reference list (Fig. 29, 1). Define all document types (Reference Types) that you use in your work. To define a document type, select it in the \texttt{Reference Types} field (2). An empty field for the selected document type is displayed.
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 Capitalisation 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 Capitalisation of Individual Fields

Use the Change Case feature to change the case for one individual dataset. To do this, go to the dataset, highlight the title or author and select how the data should be displayed via the drop-down menu Aa (see Fig. 30).
6.3.2 Capitalisation 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 => Menu Edit => Output Style => Open Style Manager. Choose your citation style and click Edit.

Under the heading Bibliography you will find the item Title Capitalisation (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).

6.3.3 Capitalisation 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 => menu Edit => 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.

Use the drop-down menu Capitalisation to choose how the names appear in the reference list, in-text citation, or footnote (see Fig. 32).
7 Collaboration and Synchronisation 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 email address.

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 My Tools menu and create an EndNote Web account using your TUM email address (Fig. 33).
7.2 Synchronisation 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 synchronise data between different devices, synchronisation 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 synchronised. Group Sets, Smart and Combined Groups are not displayed in EndNote Web, however, after the synchronisation to another end device they reappear in EndNote.

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

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 it to open the context menu. Choose Share Group.
2. in section Invite More People insert the e-mail addresses of the people you want to share your group with.
3. choose for each person, whether they shall have read-only or read and write access.
4. You may enter a personal note to the recipient in the field Add A Message.

The e-mail address doesn’t 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 Organise menu,
2. create a new group or select an already existing group whose entries you wish to share and go to the Share button.

3. Now add collaborators and assign the desired editing rights. To add collaborators, you need the email 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 synchronisation (see Fig. 34) 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. 35). 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 dialogue box, enter the email addresses of all persons with whom you wish to share your library (Fig. 36). This does not have to be the email address with which the particular person created their EndNote web account. Furthermore, you define whether the person shall have read-only or read and write access. Invitees receive an invitation via email, 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 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.

Changes made in a shared library can be tracked via the Activity Feed (see Fig. 37). The last 500 changes are displayed.

Figure 36: Inviting other EndNote users to a shared library

Figure 37: Activity Feed
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 (Fig. 38).

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 maintains 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 replaces 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 an .rtf or .odt file.

You can then feed them into EndNote via the menu Tools => Format Paper. A dialogue box opens in which EndNote displays all the citations it can match (Fig. 39). 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 reformattting. 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 40).

From EndNote X9 you find this function also in EndNote desktop and Word.
*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. 41)
Starting the Manuscript Matcher from EndNote desktop or Word, the references from the selected group respectively the Word document are automatically transferred.

Figure 41: Manuscript Matcher in Word

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).

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. 43:

You will receive up to ten suggestions. For each journal, you can see in a ranking which terms, regarding content, correspond to the topics discussed therein (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. 37 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/rt0rT0wemrl.
Please note that this does not guarantee that your article will be accepted.

9 Further Import Options

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

9.1 EndNote Capture Bookmarklet

The EndNote Capture bookmarklet allows you to capture Internet sources. The bookmarklet can be found in your Endnote Web Account in the Download menu. Drag and drop the bookmarklet Capture Reference into the toolbar of your browser (Fig 44).
For example, if you want to save a website as a reference, click on the bookmarklet in your browser. The following window will open (s. Fig. 45):

![Figure 45: Saving an Internet page with the EndNote Capture Bookmarklet](image)

EndNote takes over the data it can find as reference. Especially with websites, this information is often incomplete and incorrect. Therefore, check and complete the data carefully. Then choose whether to save the reference in Endnote (Desktop) or directly in your EndNote Web account (my.endnote.com). Click on Save To to save the reference (Fig. 45).
9.2 Import from Google Scholar

In Google Scholar, you have the option to obtain a direct link to the import of references in EndNote (see Fig.46).

Figure 46: EndNote import link in Google Scholar

To set this up, go to Google Scholar’s Settings and then to the tab Search Results. There, under Bibliography manager, select Show links to import citations into EndNote to be presented with the links to import references into EndNote (Fig. 47). Select EndNote from the drop-down menu. Save the changed settings. With your next search you will see a link under each title, which allows direct import into EndNote. Import the data just as you import from databases or catalogues, via direct import, by opening the import file directly with Endnote.

Figure 47: 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 in the Help menu, hidden behind the name Contents (F1).

**Technical support**
You can get technical support via: [https://support.clarivate.com/s/](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: [literaturverwaltung@ub.tum.de](mailto:literaturverwaltung@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](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](https://media-tum.ub.tum.de/1225458)

**Reference Management and Citation Consulting Hours by the TUM University Library**
In addition to our reference management courses, we also offer a weekly reference management consulting hour in Munich, where individual questions can be discussed. On top of this, appointments for an online consultation can be arranged. All information can be found on our homepage at: [https://www.ub.tum.de/en/consultation-citation](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 catalogues and databases can be downloaded from the EndNote website: [http://www.endnote.com/support/enconnections.asp](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

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Updated: March 2019