

ENDNOTE® X7

THE LITTLE ENDNOTE HOW-TO BOOK



THOMSON REUTERS™



INTRODUCTION

The first thing you need to know is this is not a manual. It will not tell you which operating system any given version of EndNote is compatible with or how much RAM you need to run EndNote. It will not try to cover each finicky detail of what EndNote can do.

So what is it?

This is an ebook of instructions on how to accomplish specific tasks in EndNote, such as importing references from a specific online database. The author will try to keep the screenshots and instructions as current as possible, which means there may be frequent new editions of this book. The goal will always be the same, though—to teach you how to make EndNote do the things you want it to do.

Thank you for using EndNote!

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1 INSTALLING ENDNOTE

This chapter will have two main sections, one for administrators who want to create site license installers for their EndNote users, and one for users. Both of these sections will be detailed, with step-by-step instructions and screenshots.

EndNote can be installed on multiple computers just as a single user would install it, entering the product key for every installation. However, it is not necessary to enter the product key for every installation if the administrator creates a site license installer.

Please note that you will need an administrative level of access sufficient to install software on your computer. Also note that security software or operating system security settings may stop the installation process at various times and ask your permission to continue. You must choose the option to continue for the software to be installed.

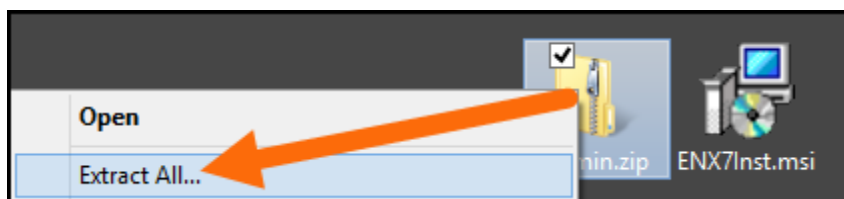
Please also note the network administrator instructions will **only** work for site license/volume installations. They will **not** work for single-user installations.

1.1 FOR ADMINISTRATORS

1.1.1 Creating a Site License Installer for Windows

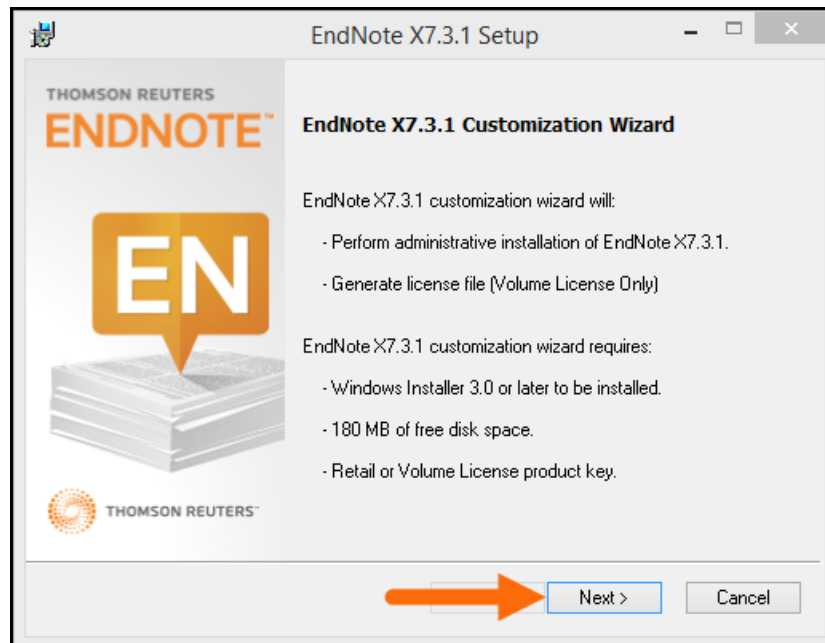
A site license installer for Windows consists of two files: 1) *ENX7Inst.msi* and 2) *license.dat*. These two files can be distributed to users and the user can install EndNote on their computer without knowing the site's product key for the installation. Anybody with knowledge of the product key for the site can create a site installer, with no programming knowledge needed.

- Download the EndNote Windows installer from <http://endnote.com/x7/ENX7Inst.msi> (the address is case-sensitive and must be typed exactly as shown).
- Download the *ADMIN.zip* file from <http://endnote.com/sites/en/files/m/zip/admin.zip> (the address is case-sensitive and must be typed exactly as shown).
- Extract the *ADMIN.bat* file by right-clicking on the *ADMIN.zip* file and selecting **Extract All**, as shown below.



- This will result in a folder with the *ADMIN.bat* file inside it. Put the *ADMIN.bat* file and the *ENX7Inst.msi* file together in the same folder or on the desktop. They must be in the same location to create a site installer.
- Double-click on the ***ADMIN.bat*** file to begin creating the site installer.

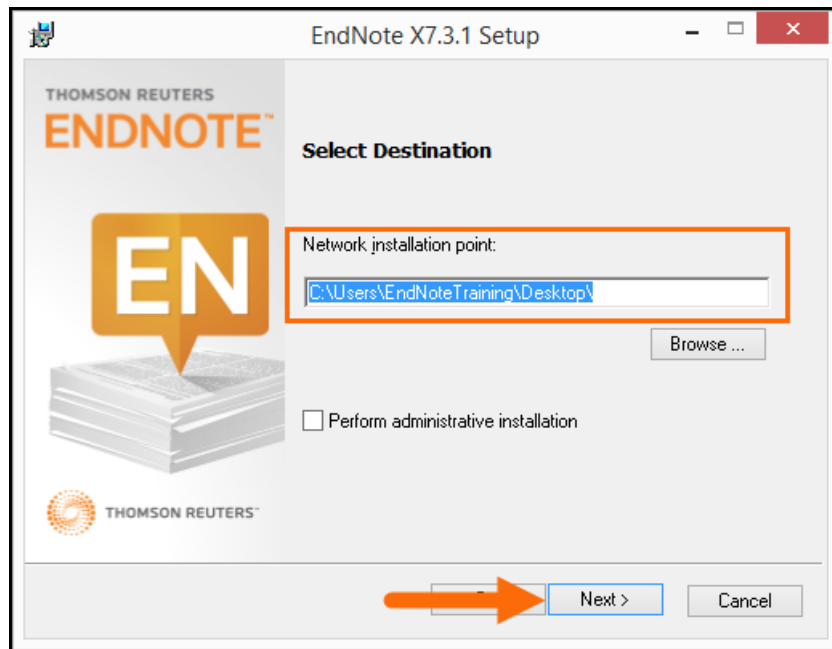
- When the window below appears, click the **Next** button.



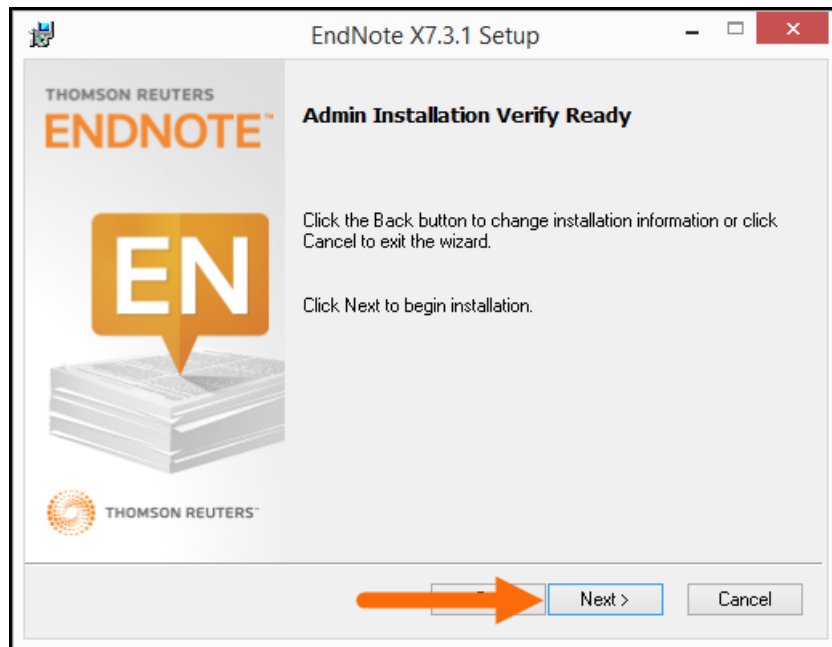
- In the next window, fill in your school, company, or agency name and the product key. Mark the box to acknowledge that you have read and accept all terms of the license agreement. Then click the **Next** button.



- In the window below, use the **Browse** button to select the location the site installer will be created in, then click the **Next** button. Do *not* mark the option “Perform administrative installation.”



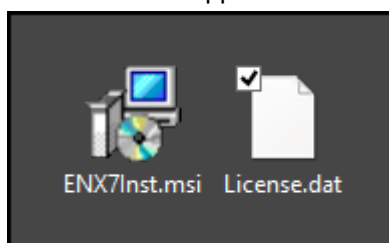
- Then click the **Next** button again in the window below.



- Then the **Finish** button in the window below.



- You should see the site installer files together in your target folder, as shown below. You may now distribute these two files to users. Some schools zip the files together to make them easier to distribute. If you decide to zip the files, the user will need to extract them before running the installation. The installer will not run from a zipped file.



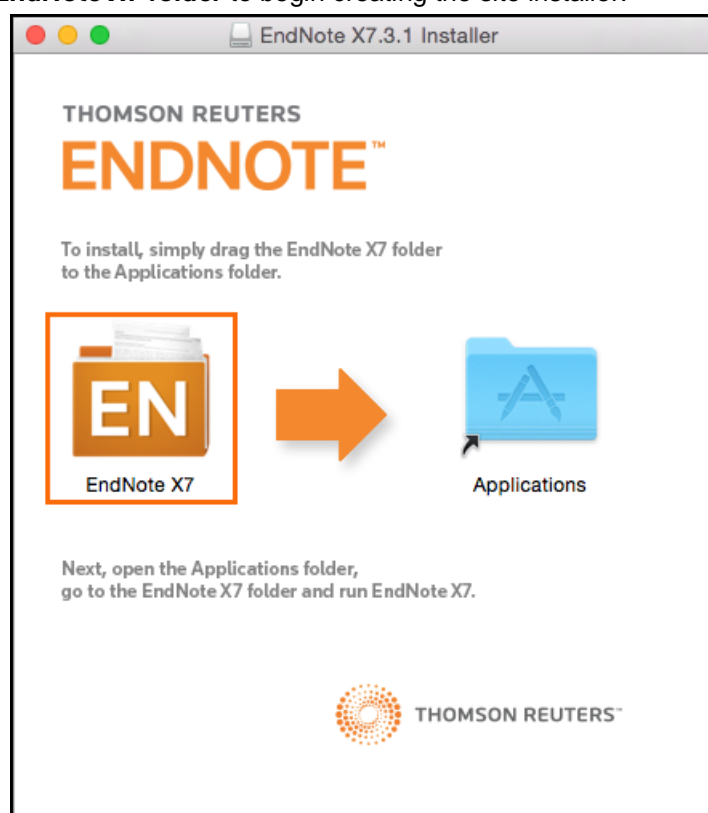
1.1.2 Creating a Site License Installer for Macintosh

A site license installer for Macintosh consists of a single file called *EndNote X7 Site Installer.dmg*. This file can be distributed to users and the user can install EndNote on their computer without needing the site's product key for the installation. Anybody with knowledge of the product key for the site can create a site installer, with no programming knowledge needed.

Note you may receive a message that EndNote is requesting access to your Contacts during the installation. This access is used to determine the current user of the software and you are not required to allow access to continue the installation.

- Download the EndNote Macintosh installer from <http://endnote.com/x7/EndNoteX7Installer.dmg> (the address is case-sensitive and must be typed exactly as shown).
- Place the *EndNoteX7Installer.dmg* file on your desktop. Then double-click on the file.

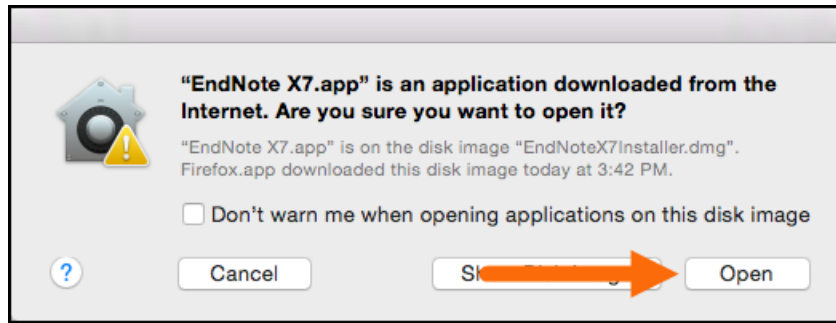
- Do not drag the EndNote X7 folder to Applications as shown in the image below. Instead, **double-click on the EndNote X7 folder** to begin creating the site installer.



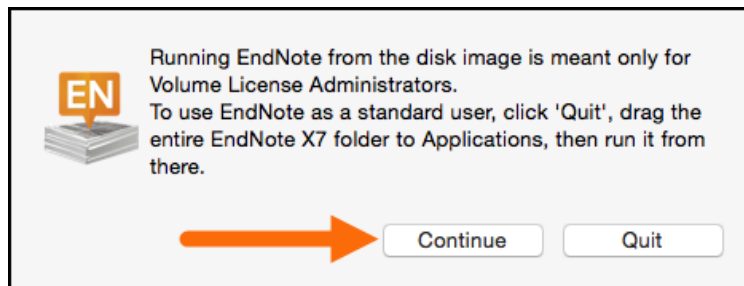
- Double-click on the **EndNote X7.app** file.

| EndNote X7 | | | | |
|------------------------------|---|------------------------|---------|--------------|
| Name | ^ | Date Modified | Size | Kind |
| ▶ Cite While You Write | | Apr 30, 2015, 11:07 AM | -- | Folder |
| ▶ Connections | | Apr 30, 2015, 11:01 AM | -- | Folder |
| ▶ Demo License Agreement.txt | | Apr 30, 2015, 11:07 AM | 13 KB | text |
| ▶ EndNote X7.app | | Apr 30, 2015, 11:06 AM | 85.3 MB | Application |
| ▶ EndNoteX7MacHelp.pdf | | Apr 30, 2015, 11:07 AM | 4.4 MB | PDF Document |
| ▶ Examples | | Apr 30, 2015, 11:07 AM | -- | Folder |
| ▶ Filters | | Apr 30, 2015, 11:02 AM | -- | Folder |
| ▶ License Agreement.txt | | Apr 30, 2015, 11:07 AM | 13 KB | text |
| ▶ Plugins | | Apr 30, 2015, 11:07 AM | -- | Folder |
| ▶ Product-Support | | Apr 30, 2015, 11:07 AM | -- | Folder |
| ▶ Readme.txt | | Apr 30, 2015, 11:07 AM | 7 KB | text |

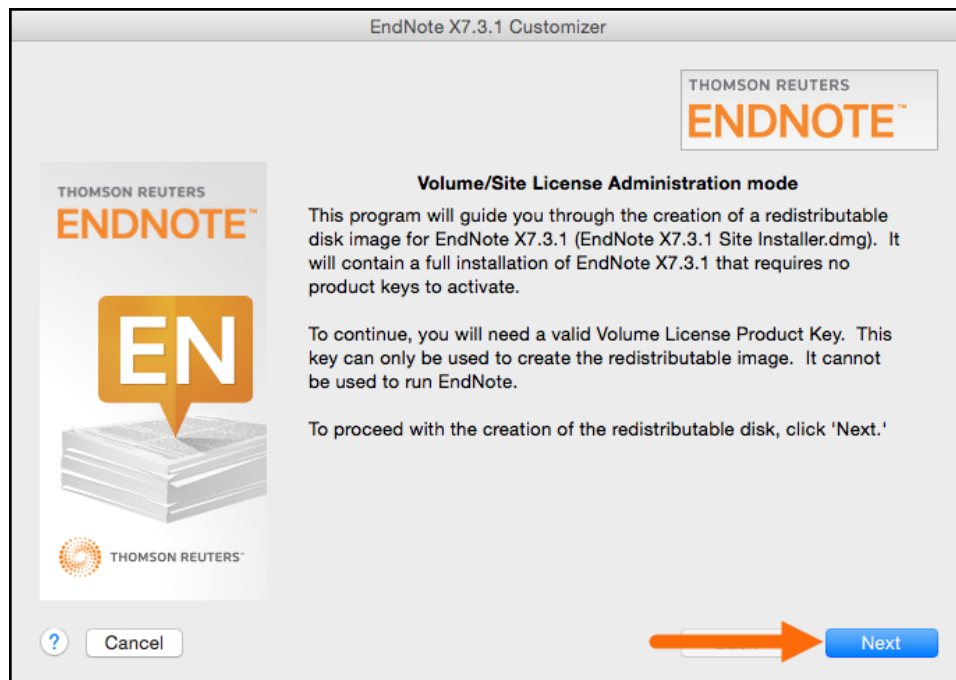
- If you see the window below, click **Open**.



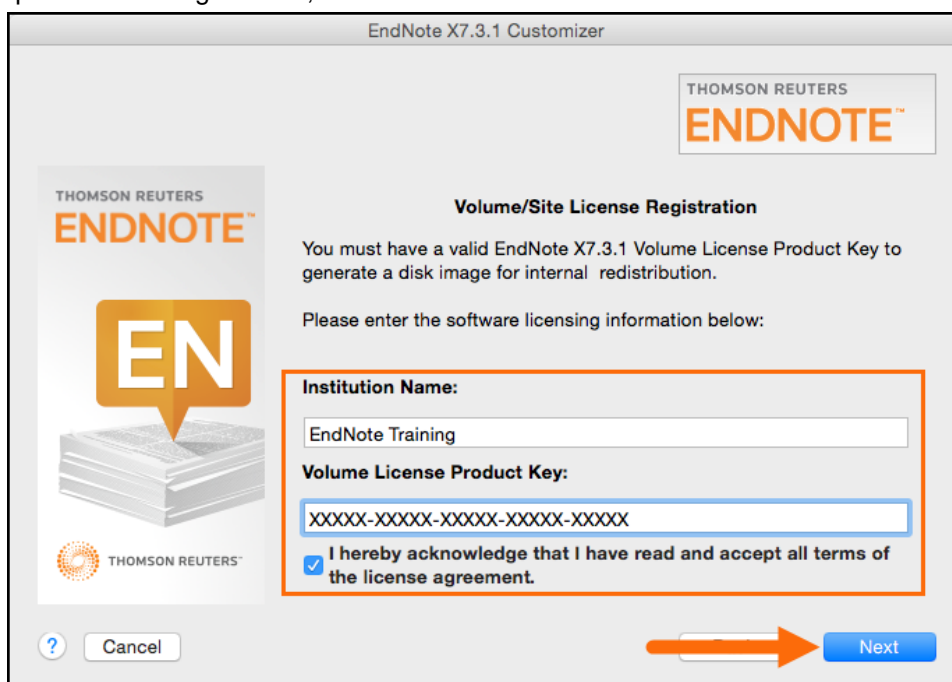
- You will receive a warning that running EndNote from the disk image is meant only for volume license administrators, displayed in front of another EndNote window. Click **Continue** to continue creating a site license installer.



- Next you will receive a warning that you will need a valid site license product key to create a redistributable image. A single-user license key cannot be used to create a site license installer. Click **Next** to continue.



- Fill in your institution's name and the product key, mark the box acknowledging you have read and accept the license agreement, and click the **Next** button.



EndNote X7.3.1 Customizer

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Volume/Site License Registration


You must have a valid EndNote X7.3.1 Volume License Product Key to generate a disk image for internal redistribution.

Please enter the software licensing information below:

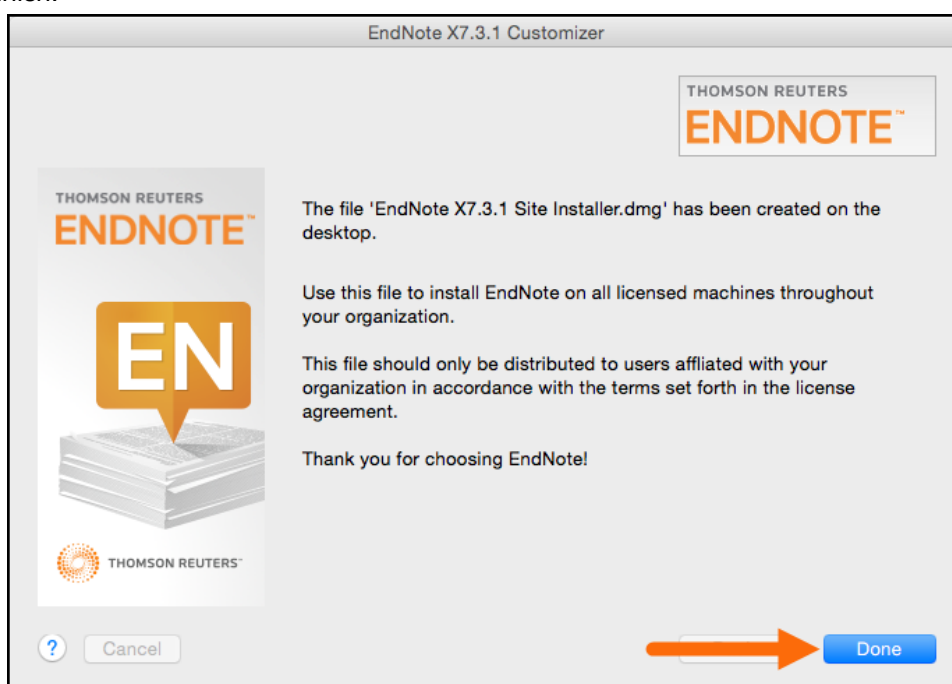
Institution Name:

Volume License Product Key:

☒ I hereby acknowledge that I have read and accept all terms of the license agreement.

? Cancel  Next

- When the site installer has been created you will receive the message below. Click the **Done** button to finish.



EndNote X7.3.1 Customizer

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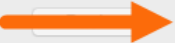
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The file 'EndNote X7.3.1 Site Installer.dmg' has been created on the desktop.

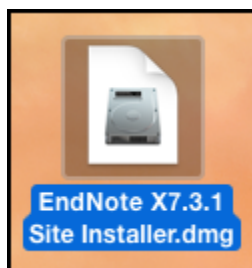
Use this file to install EndNote on all licensed machines throughout your organization.

This file should only be distributed to users affiliated with your organization in accordance with the terms set forth in the license agreement.

Thank you for choosing EndNote!

? Cancel  Done

- You should now see a file like the one below on your desktop. Distribute the *EndNote X7 Site Installer.dmg* file to your Macintosh users. They can use it to install the software without a product key.



1.2 FOR USERS

1.2.1 A Custom Installation for a Site License Copy of EndNote on Windows

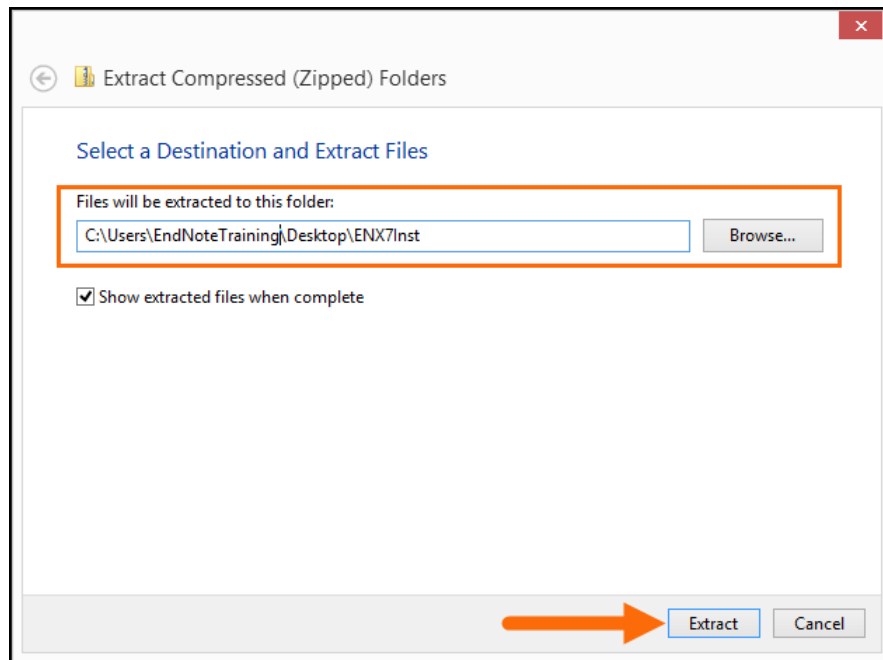
A typical installation of EndNote installs less than 500 styles, 500 filters, and 500 connection files to EndNote, even though there are thousands of styles, as well as many more filters and connection files. A custom installation will allow the user to add extra sets of styles, filters, and connection files to EndNote. For example, a user could add all the humanities styles available to the typical set.

If you have a previous version of EndNote installed, you should uninstall it using *Control Panel* before installing the new version.

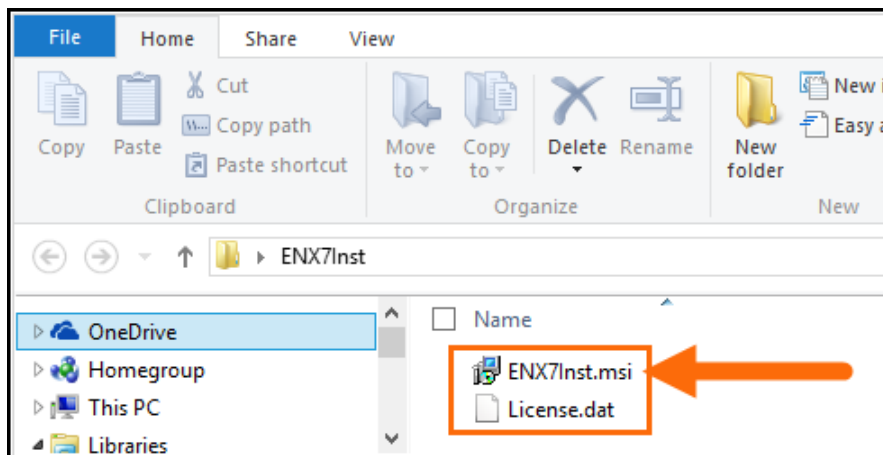
- Your school, company, or agency will need to provide you with two files to install the program, an *ENX7Inst.msi* installer and a *license.dat* file. These two files must be together in the same folder for the installation to run without asking for a product key. If you are given a zipped file containing these two files, as in the example file shown below, you will need to extract them from the zipped file before running the installer. Right-click on the file, then select the **Extract All** option as shown below.



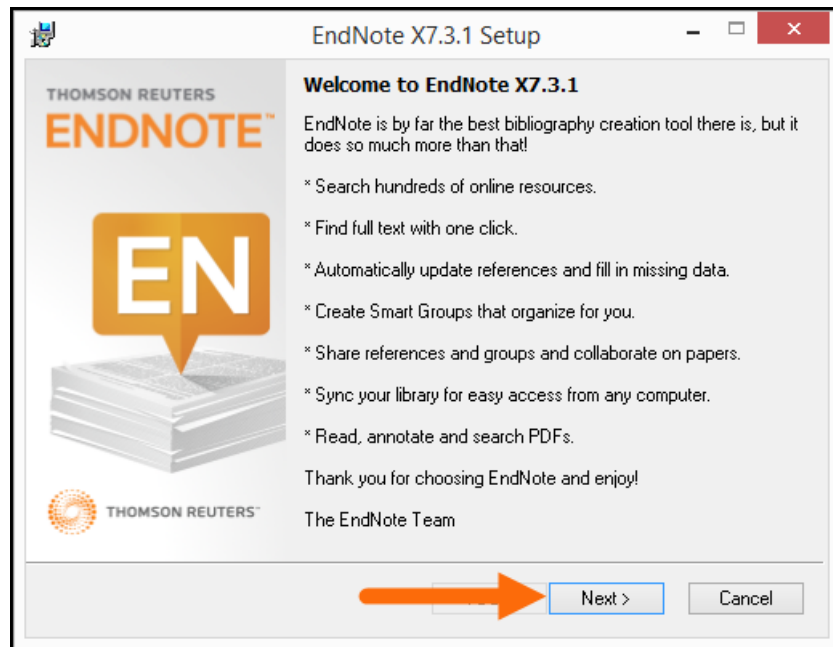
- Use the **Browse** button to select the folder the files will be placed in after extraction, then click the **Extract** button.



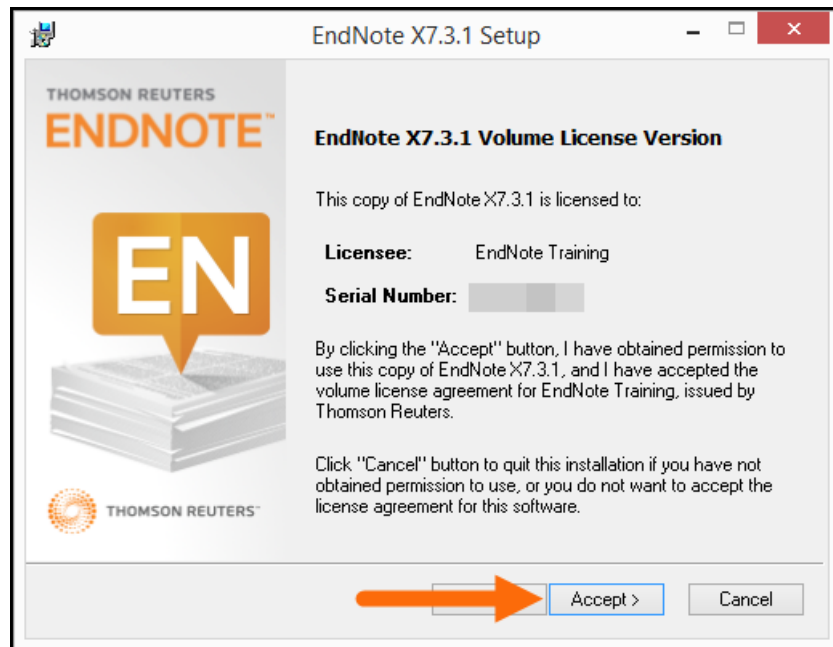
- The files will be extracted to the selected folder. Keep the two files together and double-click on the **ENX7Inst.msi** file to start the installation.



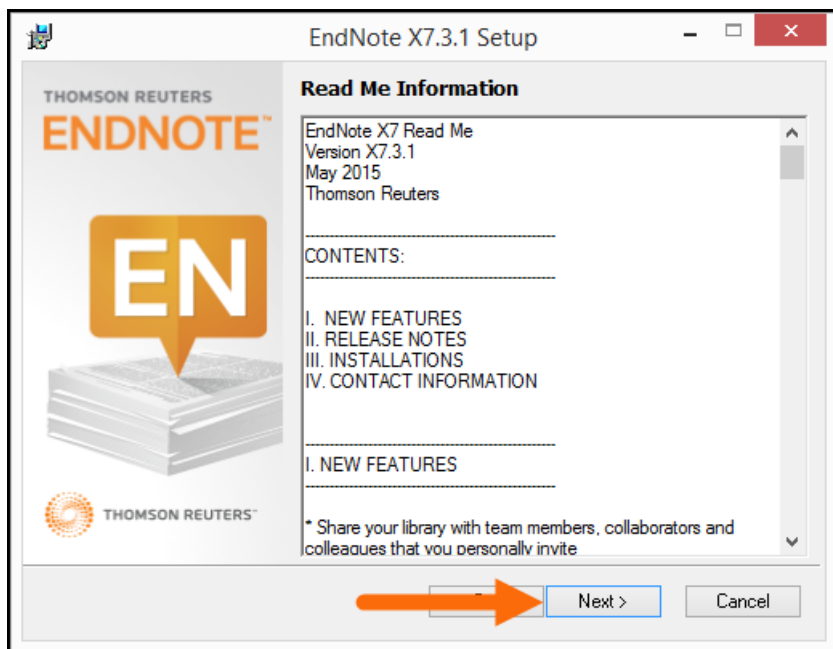
- In the window below, click the **Next** button to continue.



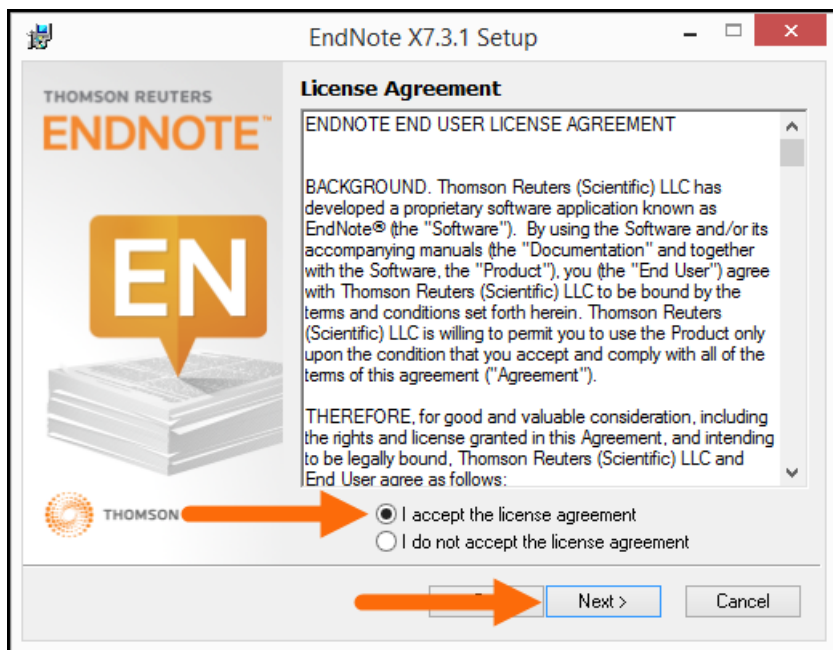
- Click the **Accept** button to confirm that you have permission from your organization to install the EndNote software. If you do not have permission, you should not install the software.



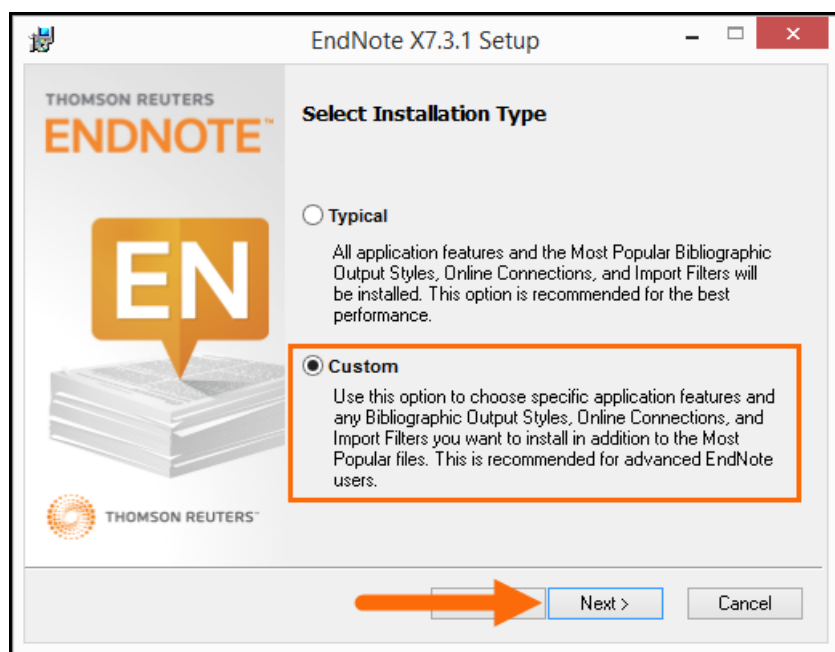
- Next you will see the window below, where you can review the *Read Me Information*. Then click the **Next** button to continue.



- In the window below, accept the EndNote end user license agreement before you click **Next** to continue the installation.



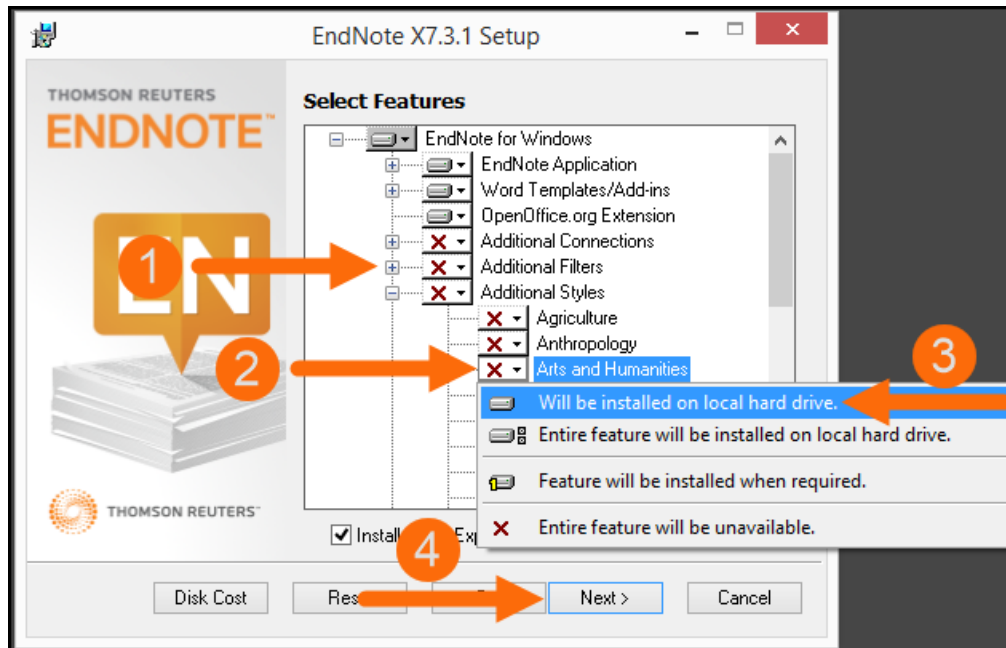
- In the window below, decide if you will perform a typical installation or a custom installation. If you select a *Typical* installation, a limited set of popular styles, filters, and connection files will be installed. If you select a *Custom* installation, you can choose which additional sets of styles, filters, and connection files will be added to the typical set. The remaining windows will show the options for a *Custom* installation.



- By default, the program will be installed in the *C:\Program Files (x86)\EndNote X7* folder, but you can change this if you need to. It is best to leave it with the default location unless it is necessary to put it in another folder for some reason, such as a lack of space on the C drive. Click the **Next** button to continue.



- In the window below—
 1. Click the plus sign (+) by an option to open it for editing.
 2. Click the drop-down list button for the sets of styles, filters, or connection files you want to add. For this example, the set of all *Arts and Humanities* styles is selected.
 3. Select the *Will be installed on local hard drive* option to install just that set of files.
 4. Click the **Next** button after making all your selections.



- Note: In the window above you could also click the option (for example, *Additional Styles*), then select the option *Entire feature will be installed on local hard drive* to install all the files for that option. Please remember for Styles that would install over 6,000 styles.

- Click the **Next** button again in the window shown below.



- Click the **Finish** button when you see the window below saying EndNote has been successfully installed. You are now ready to begin using EndNote.



1.2.2 A Custom Installation for a Single-User Copy of EndNote on Windows

A custom installation for a single user will proceed just as it does for a site license user, except the program may be installed from a disk or from a single downloaded installation file. The user will be required to input a product key, then proceed from the *Read Me Information* as shown [above](#).

1.2.3 A Custom Installation for a Site License Copy of EndNote on Macintosh

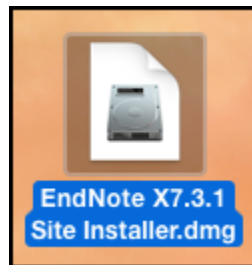
A typical installation of EndNote installs less than 500 styles, 500 filters, and 500 connection files to EndNote, even though there are thousands of styles, as well as many more filters and connection files. A custom installation will allow the user to add extra sets of styles, filters, and connection files to EndNote. For example, a user could add all the humanities styles available to the typical set.

Note that you may receive a message that EndNote is requesting access to your Contacts during the installation. This access is used to determine the current user of the software. You are not required to allow access to continue the installation.

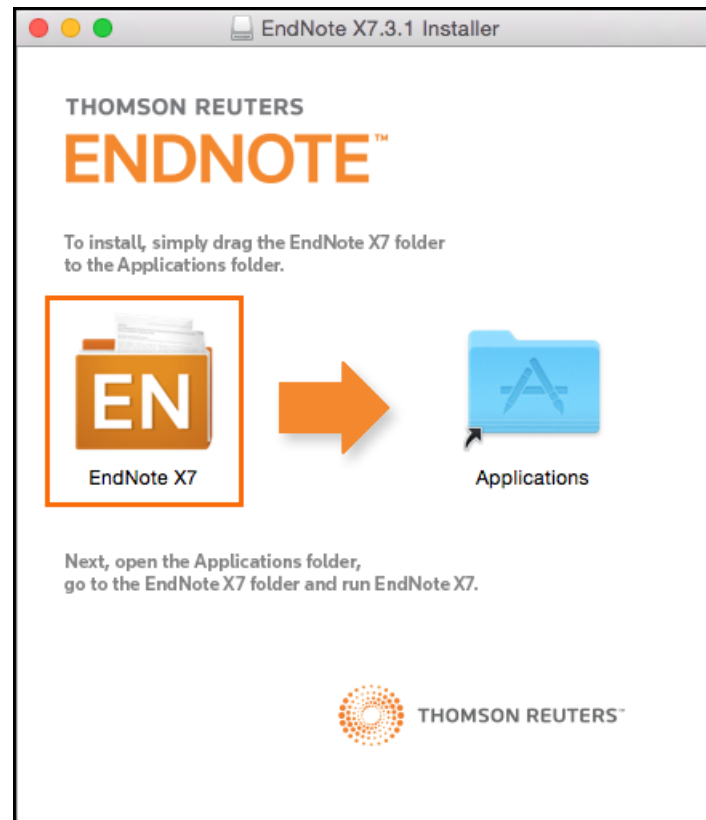
Also note that your Security & Privacy settings must allow apps downloaded from the Mac App Store and identified developers to install EndNote.

If you have a previous version of EndNote installed, you should uninstall it before installing the new version. You can find instructions for uninstalling recent previous versions of EndNote in section 1.2.5.

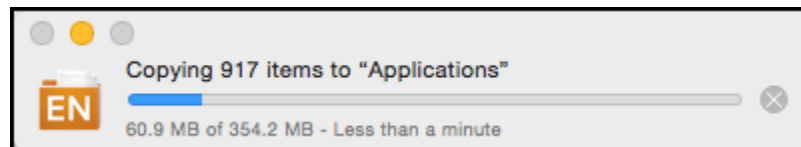
- You should receive a single file called *EndNote X7 Site Installer.dmg* from your site administrator like that shown below. Only a site installer can be used to install a permanent volume copy of EndNote without a product key. Double-click on the site installer to begin the installation.



- In the window below, drag the *EndNote X7* folder icon to the *Applications* shortcut shown in the window.



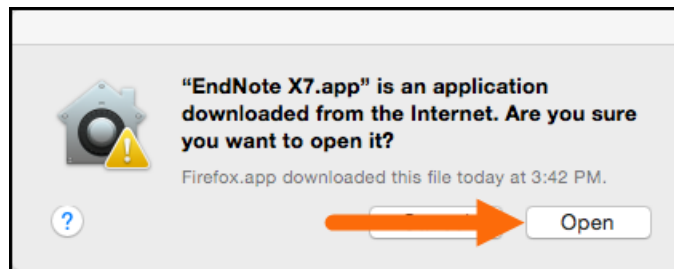
- You will see a message that the EndNote “items” are being copied to Applications.



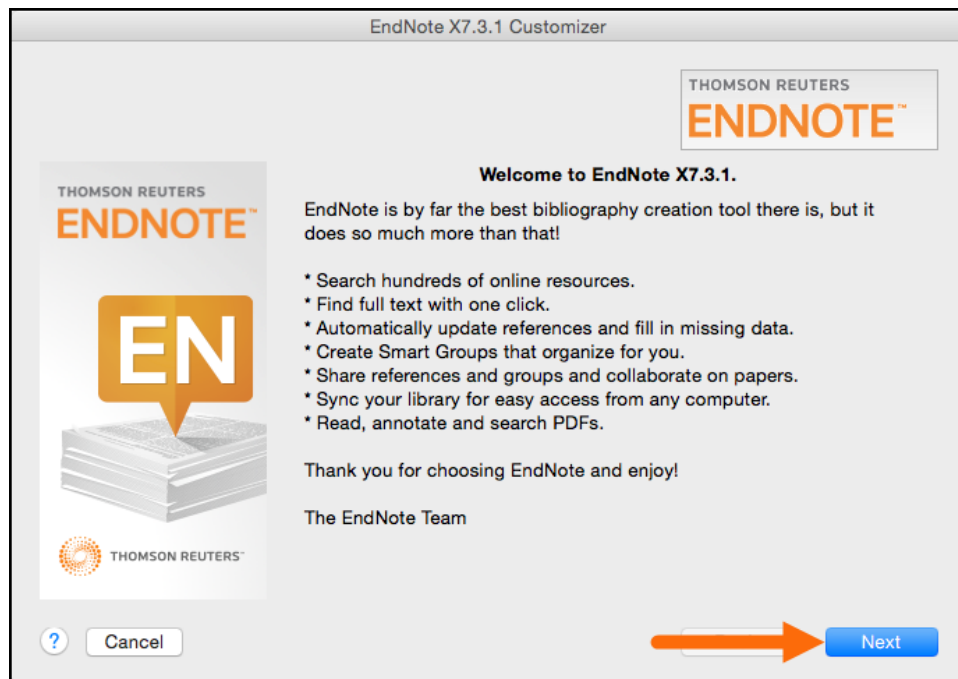
- When the installer finishes copying items, click the **Launchpad** icon in your dock (left below), then the **EndNote** icon (right below) to open the EndNote application.



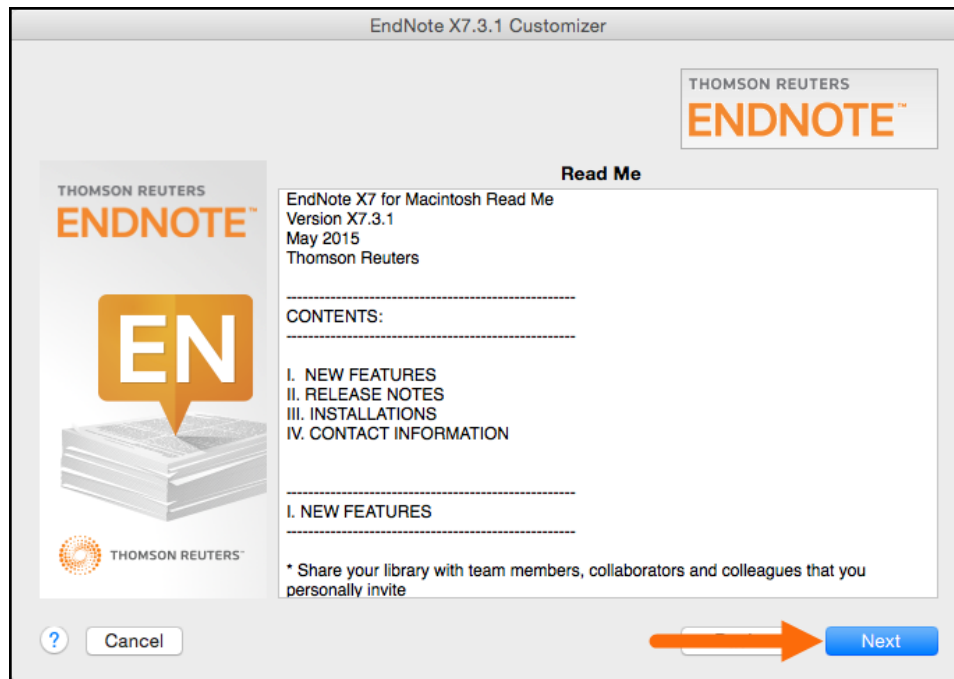
- If you see the message below, click the **Open** button.



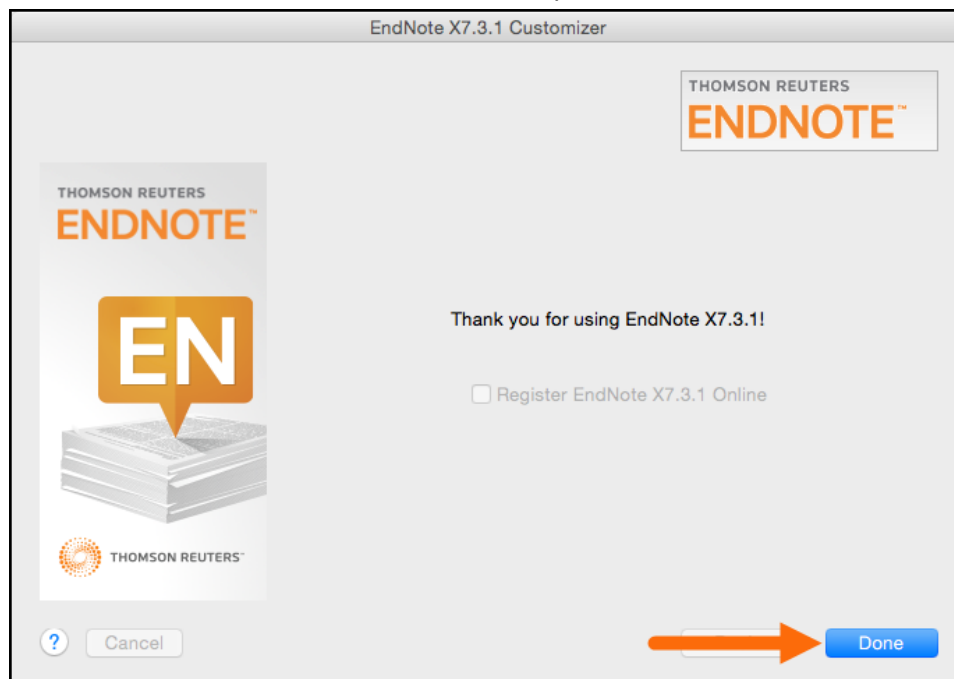
- The first time you open EndNote it will complete the installation process, starting with the message below. Click the **Next** button.



- You are then shown the Read Me information. Click the **Next** button to continue.



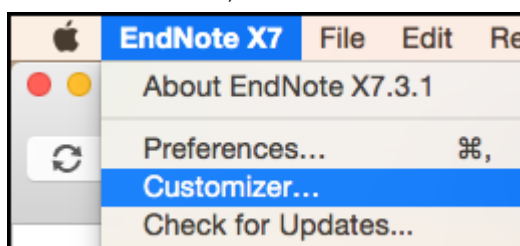
- Then the **Done** button in the window below to complete the installation.



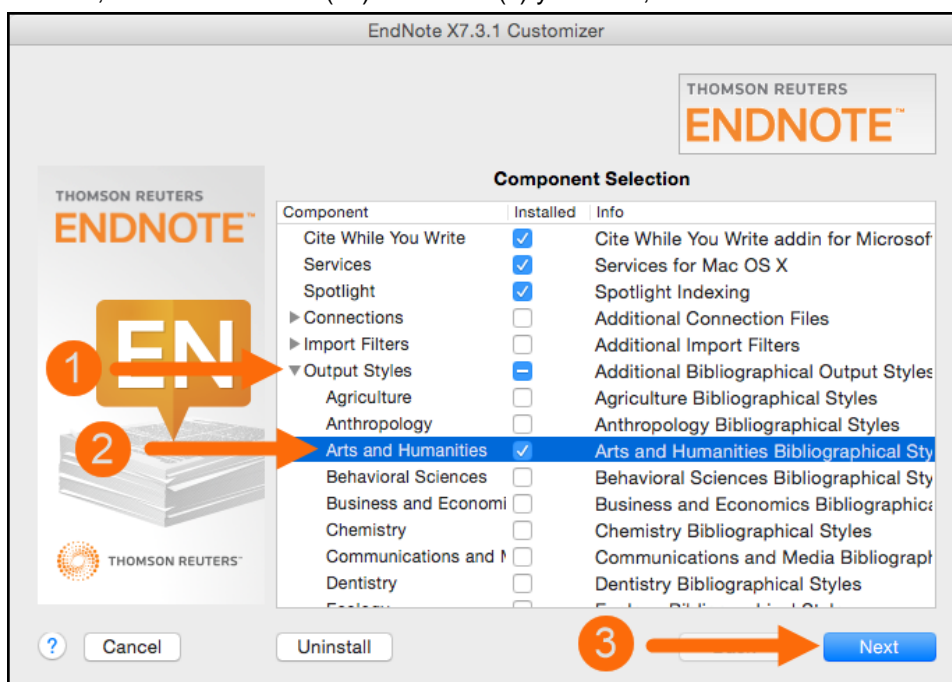
- EndNote will automatically create an EndNote library for you called “My EndNote Library” and place it in the Documents folder. It will also show the *Welcome to EndNote* guide below. When finished looking through the *Welcome to EndNote* guide you can close it using the **Close** button in the upper-left corner.



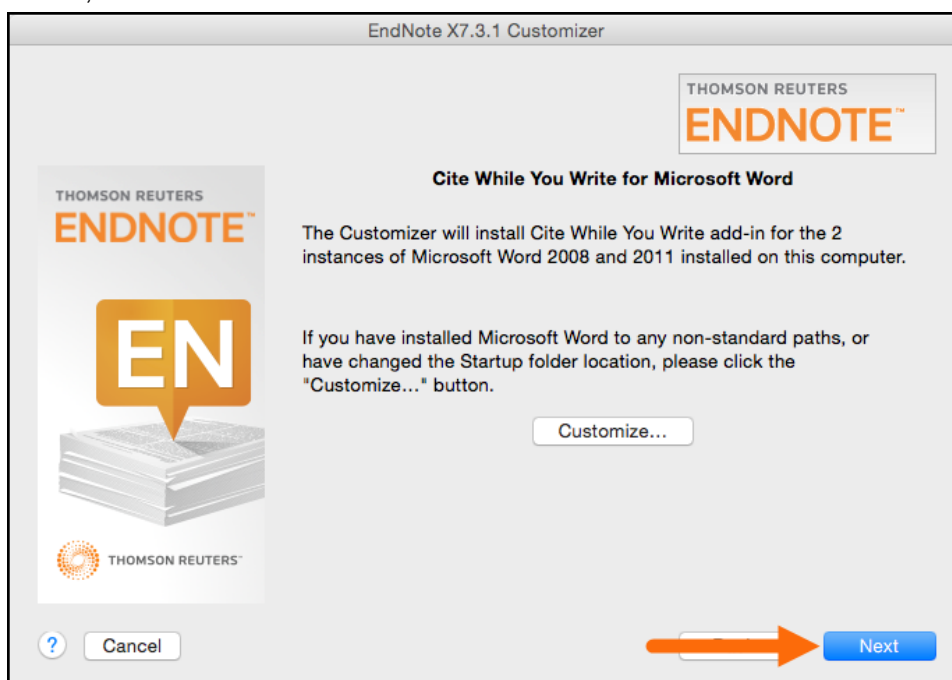
- To add styles, filters, and connection files, select **Customizer** from the **EndNote** menu.



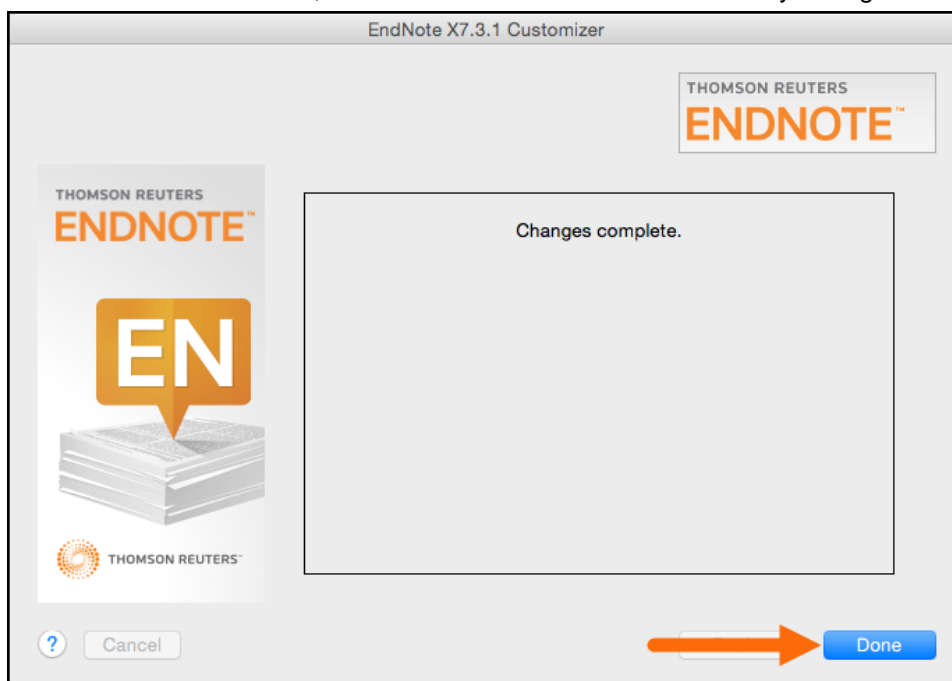
- Click the small arrow by *Connections*, *Import Filters*, or *Output Styles*, to select the type of files you want to add, then mark the box(es) for the set(s) you want, and click the **Next** button.



- You will also have the option to customize Cite While You Write if you have not used standard settings while installing Microsoft Word. Click *Customize* if you have a nonstandard Word installation, otherwise click **Next**.



- When the Customizer finishes, click **Done** to finish. You are now ready to begin using EndNote.



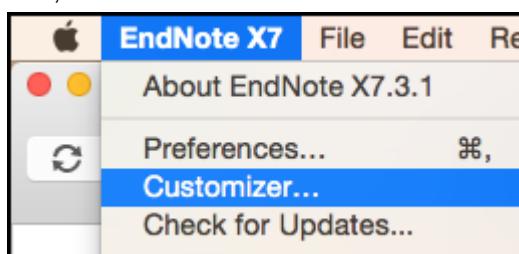
1.2.4 A Custom Installation for a Single-User Copy of EndNote on Macintosh

An installation for a single-user copy of EndNote will be very much the same as for a site-license copy, with the addition of needing to provide a license key the first time you open EndNote.

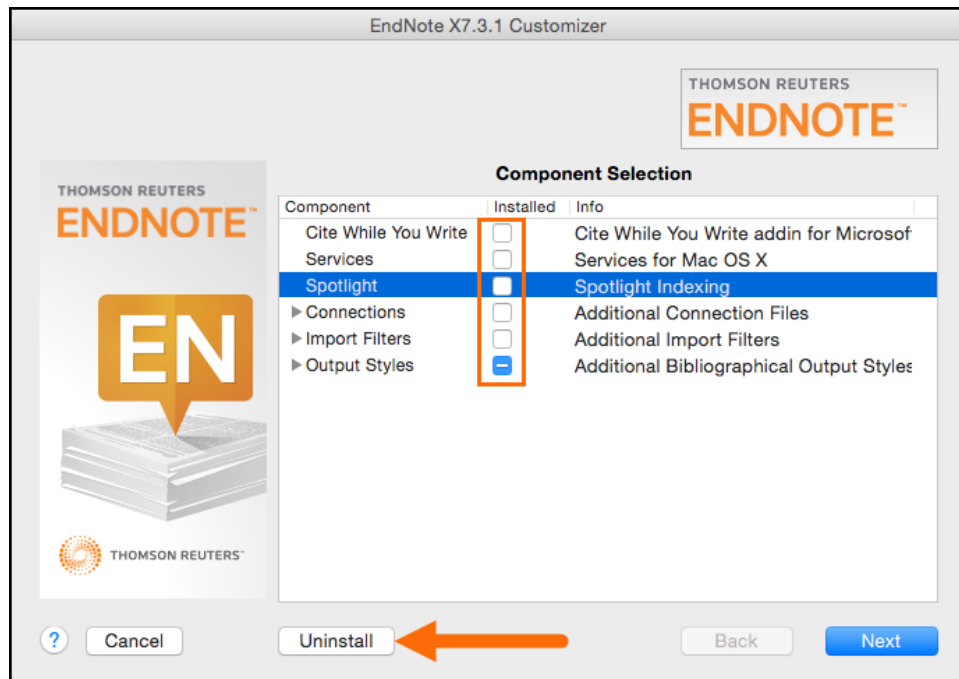
1.2.5 Uninstalling EndNote on Macintosh

Previous versions of EndNote should be uninstalled before installing the current version.

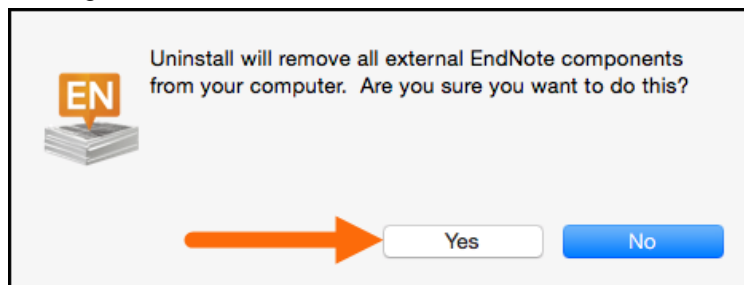
- Close all EndNote libraries, then select **Customizer** from the **EndNote** menu to begin.



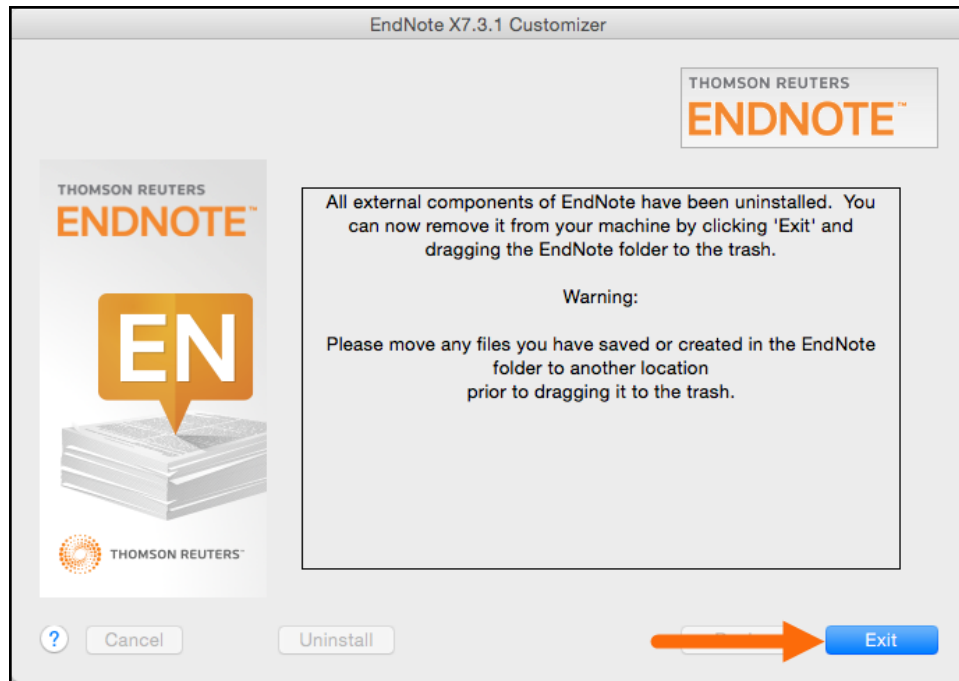
- In the *Customizer* windows shown below, unmark all boxes, then click the **Uninstall** button.



- There will be a warning that all external EndNote components will be uninstalled. Click **Yes** to continue uninstalling EndNote.



- When the uninstall finishes you will see the window below. Click the **Exit** button, then drag the *EndNote* folder in *Applications* to the trash. If you have stored any personal libraries, styles, filters, or connection files in the EndNote folder, these should first be moved to the Documents folder. In general, it is best to keep these files in Documents.



- You are now ready to begin the installation, described in section 1.2.3 above.

2 USING DIRECT EXPORT TO IMPORT REFERENCES FROM ONLINE DATABASES

2.1 DIRECT EXPORT FROM THOMSON REUTERS WEB OF SCIENCE

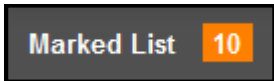
2.1.1 Using the Marked List

Web of Science's marked list provides a useful way to keep track of the references you want to keep when browsing a large set of search results. References can be added to the marked list as you browse through them, then exported from the marked list later.

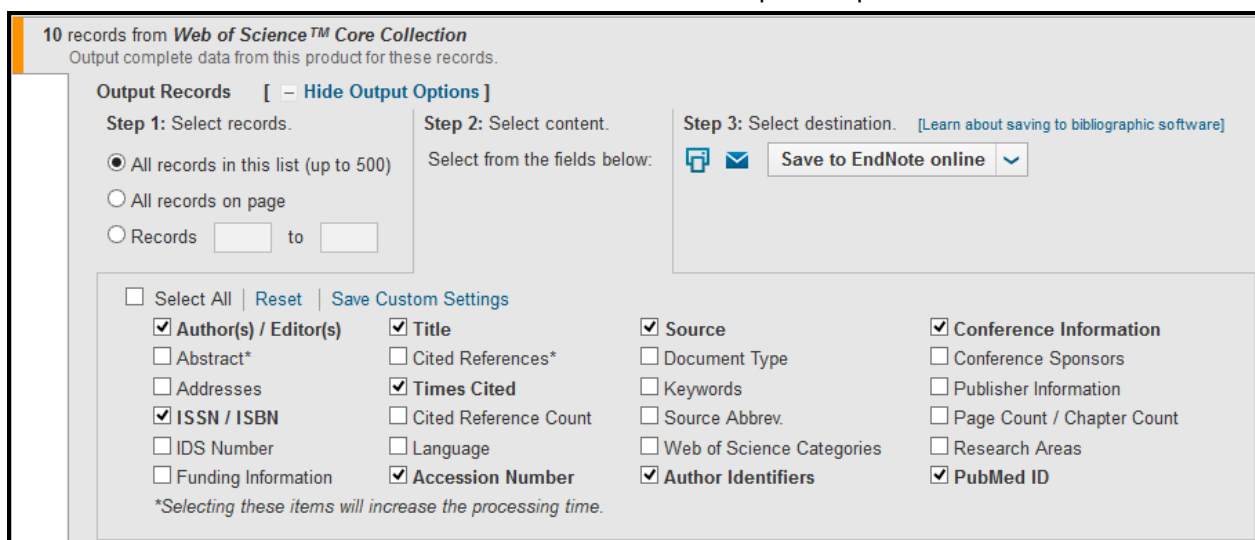
- Perform your search of the Web of Science.
- Mark the references you want to add to the marked list, and click on the **Add to Marked List** button.

A rectangular button with a black border and the text "Add to Marked List" in blue.

- When ready to export, go to the marked list by clicking the **Marked List** button.

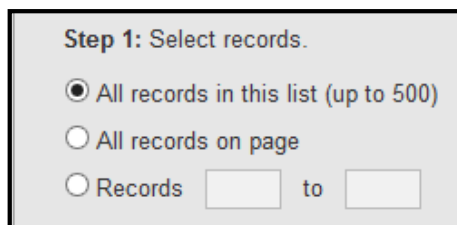
A dark grey button with the text "Marked List" in white and a small orange square with the number "10" to its right.

- You will see a window like the one below with three "steps" for options.

A screenshot of the Web of Science export options window. It has a title bar "10 records from Web of Science™ Core Collection" and a subtitle "Output complete data from this product for these records." The window is divided into three steps: Step 1: Select records, Step 2: Select content, and Step 3: Select destination. Step 1 has three radio button options: "All records in this list (up to 500)" (selected), "All records on page", and "Records [] to []". Step 2 has a "Select from the fields below:" section with a grid of checkboxes for various fields. Step 3 has a "Save to EndNote online" button and a dropdown menu. At the bottom, there is a note: "*Selecting these items will increase the processing time."

| Output Records [- Hide Output Options] | | | |
|---|---|--|---|
| Step 1: Select records. | | | |
| <input checked="" type="radio"/> All records in this list (up to 500) <input type="radio"/> All records on page <input type="radio"/> Records <input type="text"/> to <input type="text"/> | | | |
| Step 2: Select content. | | | |
| Select from the fields below: | | | |
| <input type="checkbox"/> Select All Reset Save Custom Settings <input checked="" type="checkbox"/> Author(s) / Editor(s) <input type="checkbox"/> Abstract* <input type="checkbox"/> Addresses <input checked="" type="checkbox"/> ISSN / ISBN <input type="checkbox"/> IDS Number <input type="checkbox"/> Funding Information | <input checked="" type="checkbox"/> Title <input type="checkbox"/> Cited References* <input checked="" type="checkbox"/> Times Cited <input type="checkbox"/> Cited Reference Count <input type="checkbox"/> Language <input checked="" type="checkbox"/> Accession Number | <input checked="" type="checkbox"/> Source <input type="checkbox"/> Document Type <input type="checkbox"/> Keywords <input type="checkbox"/> Source Abbrev. <input type="checkbox"/> Web of Science Categories <input checked="" type="checkbox"/> Author Identifiers | <input checked="" type="checkbox"/> Conference Information <input type="checkbox"/> Conference Sponsors <input type="checkbox"/> Publisher Information <input type="checkbox"/> Page Count / Chapter Count <input type="checkbox"/> Research Areas <input checked="" type="checkbox"/> PubMed ID |
| *Selecting these items will increase the processing time. | | | |
| Step 3: Select destination. [Learn about saving to bibliographic software] | | | |
| <input type="button" value="Save to EndNote online"/> <input type="button" value="v"/> | | | |

- Select the records you want to import in Step 1 of the window, shown below (usually "All records in this list" if 500 or less).

A screenshot of the "Step 1: Select records." section of the export window. It contains three radio button options: "All records in this list (up to 500)" (selected), "All records on page", and "Records [] to []".

Step 1: Select records.
☒ All records in this list (up to 500)
☐ All records on page
☐ Records to

- Select the fields you want to import in Step 2. The example below is from a search of the Web of Science Core Collection. If you are searching databases outside the core collection there will be fewer fields available.

Step 2: Select content.
Select from the fields below:



☐ Select All | [Reset](#) | [Save Custom Settings](#)

| | | | |
|---|---|---|--|
| <input checked="" type="checkbox"/> Author(s) / Editor(s) | <input checked="" type="checkbox"/> Title | <input checked="" type="checkbox"/> Source | <input checked="" type="checkbox"/> Conference Information |
| <input checked="" type="checkbox"/> Abstract* | <input checked="" type="checkbox"/> Cited References* | <input checked="" type="checkbox"/> Document Type | <input type="checkbox"/> Conference Sponsors |
| <input checked="" type="checkbox"/> Addresses | <input checked="" type="checkbox"/> Times Cited | <input checked="" type="checkbox"/> Keywords | <input checked="" type="checkbox"/> Publisher Information |
| <input checked="" type="checkbox"/> ISSN / ISBN | <input type="checkbox"/> Cited Reference Count | <input checked="" type="checkbox"/> Source Abbrev. | <input checked="" type="checkbox"/> Page Count / Chapter Count |
| <input checked="" type="checkbox"/> IDS Number | <input checked="" type="checkbox"/> Language | <input checked="" type="checkbox"/> Web of Science Categories | <input type="checkbox"/> Research Areas |
| <input checked="" type="checkbox"/> Funding Information | <input checked="" type="checkbox"/> Accession Number | <input checked="" type="checkbox"/> Author Identifiers | <input checked="" type="checkbox"/> PubMed ID |

**Selecting these items will increase the processing time.*

- Select **Save to EndNote desktop** from the drop-down **Save to** list in Step 3.

Step 3: Select destination.

  **Save to EndNote online** ▼

Save to EndNote online

Save to EndNote desktop ←

Save to ResearcherID - I wrote these

At this point your browser will need to send the file to EndNote. Different browsers will react differently at this point. Click on your browser below for instructions on how to proceed for your browser the first time you attempt direct export in that browser. Note that the file type shown will be different for different databases. For Web of Science it will end with a .ciw extension.

- Firefox on Windows
 - Firefox on Macintosh
 - Internet Explorer on Windows
 - Google Chrome on Windows
 - Google Chrome on Macintosh
 - Safari on Macintosh
- Safari does not support direct export.

2.1.2 Not Using the Marked List

- Perform your search on the Web of Science and select the references you want to import. Then select **Save to EndNote desktop** from the drop-down **Save to** list.

Save to EndNote online ▼

Save to EndNote online

Save to EndNote desktop ←

Save to ResearcherID - I wrote these

- You will see a window like the one below if you have selected references by marking them, and will not need to do anything further to select references.

Send to EndNote [Close]

2 records selected

Record Content: Author, Title, Source, Abstract [v]

[Send] [Cancel]

- If you have not selected references, you will see a window like this, and need to select either all the records on the page or a range of records.

Send to EndNote [Close]

Number of Records: ☒ All records on page
☐ Records [] to []

Record Content: Author, Title, Source, Abstract [v]

[Send] [Cancel]

- With either of the options above, you will now need to select the fields to export. Select the **Full Record** option to get the keywords and author's address as well as the main bibliographic information.

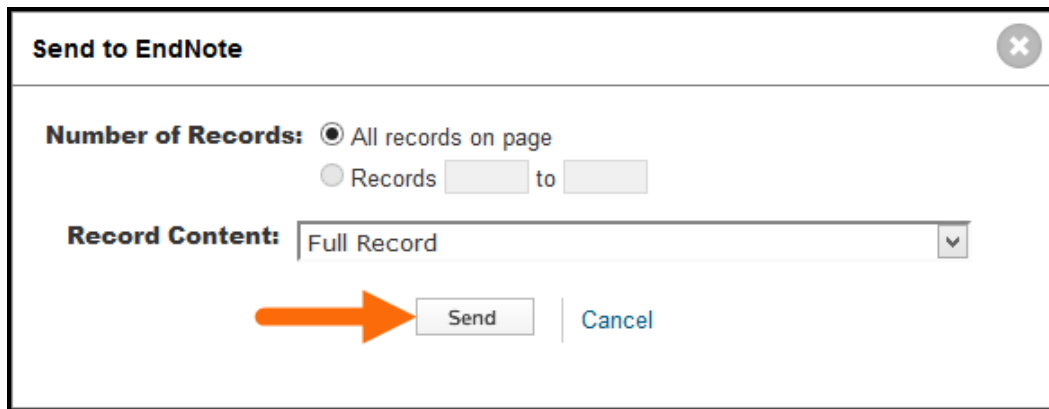
Send to EndNote [Close]

Number of Records: ☒ All records on page
☐ Records [] to []

Record Content:

- Author, Title, Source, Abstract [v]
- Author, Title, Source
- Author, Title, Source, Abstract
- Full Record**
- Full Record and Cited References

- Then click the **Send** button.



- At this point your browser will need to send the file to EndNote. Different browsers will react differently at this point. Click on your browser below for instructions on how to proceed for your browser the first time you attempt direct export in that browser. Note that the file type shown will be different for different databases. For Web of Science it will end with a .ciw extension.
 - Firefox on Windows
 - Firefox on Macintosh
 - Internet Explorer on Windows
 - Google Chrome on Windows
 - Google Chrome on Macintosh
 - Safari on Macintosh

Safari does not support direct export.

2.2 DIRECT EXPORT FROM PUBMED

2.2.1 Using the Clipboard

PubMed's clipboard provides a useful way to keep track of the references you want to keep when browsing a large set of search results. References can be added to the clipboard as you browse through them, then exported from the clipboard later.

- Perform your search of PubMed and mark the references you would like to add to the Clipboard on each page, then click on the **Send to** link to send the selected references to the Clipboard.



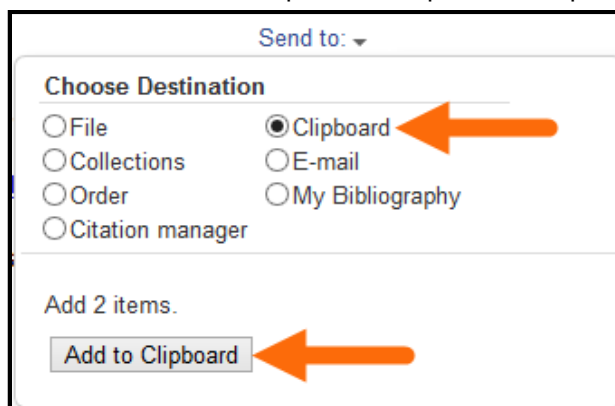
Summary ▾ 20 per page ▾ Sort by Most Recent ▾ **Send to:** ▾

Results: 1 to 20 of 348 Selected: 2 << First < Prev Page 1 of 18 Next > Last >>

☒ [Selective expression of sense and antisense transcripts of the *sushi*-ichi-related retrotransposon - derived family during mouse placentogenesis.](#)
 1. Henke C, Strissel PL, Schubert MT, Mitchell M, Stolt CC, Faschingbauer F, Beckmann MW, Strick R. *Retrovirology*. 2015 Feb 3;12(1):9. doi: 10.1186/s12977-015-0138-8.
 PMID: 25888968 **Free PMC Article**
[Related citations](#)

☒ [Schizophrenia and Depression Co-Morbidity: What We have Learned from Animal Models.](#)
 2. Samsom JN, Wong AH. *Front Psychiatry*. 2015 Feb 18;6:13. doi: 10.3389/fpsyt.2015.00013. eCollection 2015. Review.
 PMID: 25762938 **Free PMC Article**

- In the window shown below, select the **Clipboard** option, then click the **Add to Clipboard** button to add the selected references to the Clipboard. You can continue adding references to the Clipboard. Up to 500 references can be kept on the Clipboard for up to eight hours without activity.



Send to: ▾

Choose Destination

☐ File ☒ **Clipboard** ☐ E-mail
☐ Collections ☐ My Bibliography
☐ Order
☐ Citation manager

Add 2 items.

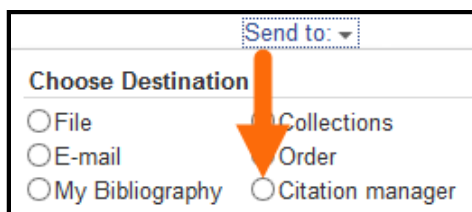
Add to Clipboard

- After adding items to the Clipboard, you will see a **Clipboard** link to the right of the **Send to** link, telling you how many items are in the Clipboard. When you have finished adding items to the Clipboard and are ready to send them to EndNote, click the **Clipboard items** link.



Send to: ▾  **Clipboard: 2 items**

- In the Clipboard screen, click the **Send to** link, then select the **Citation Manager** option.



Send to: ▾

Choose Destination

☐ File ☐ Collections
☐ E-mail ☐ Order
☐ My Bibliography ☒ **Citation manager**

- Click the **Create File** button.

Choose Destination


☐ File
 ☐ Collections

☐ E-mail
 ☐ Order

☐ My Bibliography
 ☒ Citation manager

Generate a file for use with external citation management software.

Download 2 citations.



- At this point your browser will need to send the file to EndNote. Different browsers will react differently at this point. Click on your browser below for instructions on how to proceed for your browser the first time you attempt direct export in that browser. Note that the file type shown will be different for different databases. For PubMed it will end with a .nbib extension.
 - Firefox on Windows
 - Firefox on Macintosh
 - Internet Explorer on Windows
 - Google Chrome on Windows
 - Google Chrome on Macintosh
 - Safari on Macintosh

Safari does not support direct export.

2.2.2 Not Using the Clipboard

- Perform your search of PubMed. You can mark the references you would like to export on each page if you wish. If you do not mark any references, all the references in the found set can be exported, in batches of up to 200 at a time. Click on the **Send to** link to begin the export process.

Summary ▾ 20 per page ▾ Sort by Most Recent ▾


 Send to: ▾

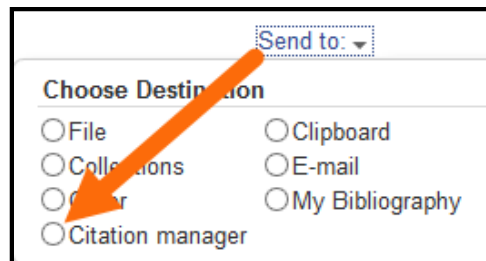
Results: 1 to 20 of 348

<< First < Prev Page 1 of 18 Next > Last >>

☐ [Selective expression of sense and antisense transcripts of the **sushi**-ichi-related retrotransposon - derived family during mouse placentogenesis.](#)

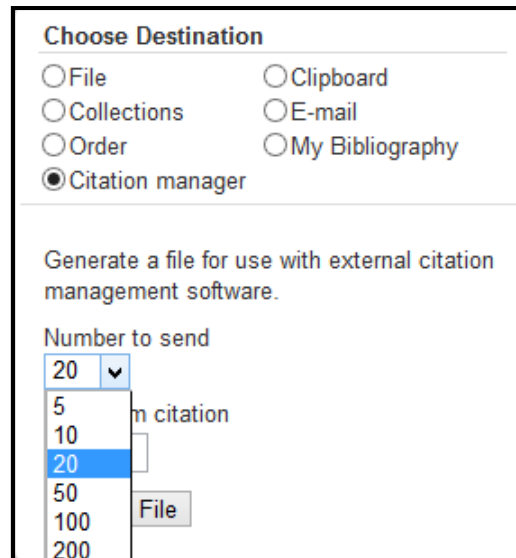
1. Henke C, Strissel PL, Schubert MT, Mitchell M, Stolt CC, Faschingbauer F, Beckmann MW, Strick R. Retrovirology. 2015 Feb 3;12(1):9. doi: 10.1186/s12977-015-0138-8. PMID: 25888968 **Free PMC Article** [Related citations](#)

- Then select **Citation Manager**.



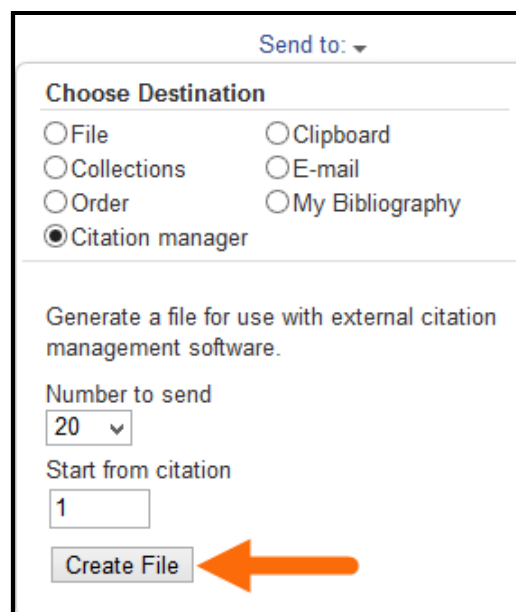
This screenshot shows the 'Send to' dropdown menu. An orange arrow points to the 'Citation manager' option, which is the last item in the list. The other options are File, Collections, Order, Clipboard, E-mail, and My Bibliography.

- Select the number of references to export in the current batch, up to a maximum of 200 references.



This screenshot shows the 'Choose Destination' dialog box. The 'Citation manager' option is selected with a radio button. Below the options, there is a section titled 'Generate a file for use with external citation management software.' and a 'Number to send' dropdown menu. The dropdown menu is open, showing options: 5, 10, 20 (highlighted), 50, 100, and 200. A 'File' button is visible to the right of the dropdown.

- Keep track of the end number of the batch so you can repeat the export process for the next batch with the next consecutive record number. Then click the **Create File** button.



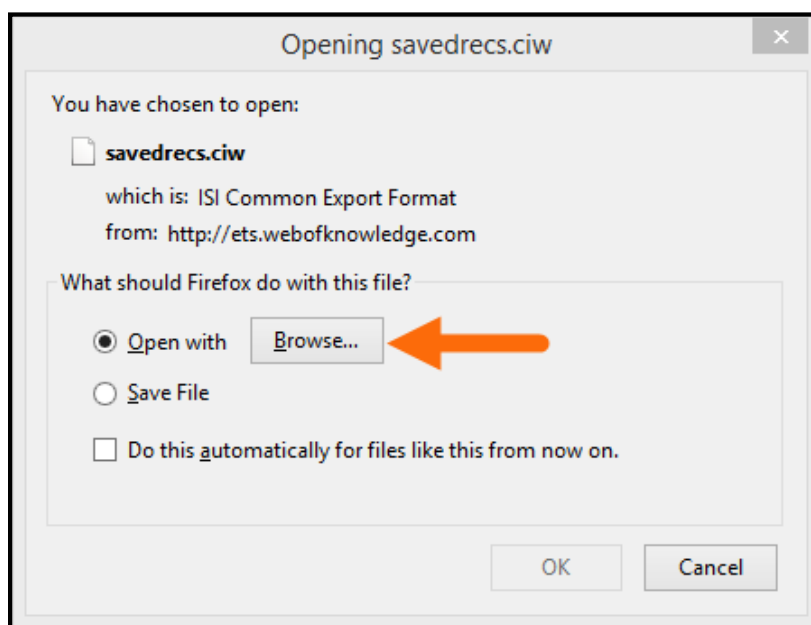
This screenshot shows the 'Choose Destination' dialog box. The 'Citation manager' option is selected with a radio button. Below the options, there is a section titled 'Generate a file for use with external citation management software.' and a 'Number to send' dropdown menu set to 20. Below that is a 'Start from citation' text box containing the number 1. At the bottom, the 'Create File' button is highlighted with an orange arrow.

- At this point your browser will need to send the file to EndNote. Different browsers will react differently at this point. Click on your browser below for instructions on how to proceed for your browser the first time you attempt direct export in that browser. Note that the file type shown will be different for different databases. For PubMed it will end with a .nbib extension.
 - Firefox on Windows
 - Firefox on Macintosh
 - Internet Explorer on Windows
 - Google Chrome on Windows
 - Google Chrome on Macintosh
 - Safari on MacintoshSafari does not support direct export.

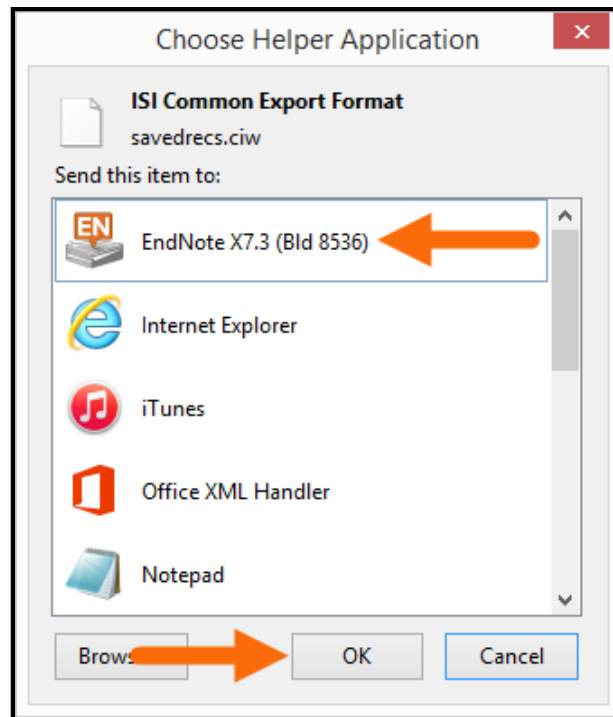
2.3 BROWSER ACTIONS WITH DIRECT EXPORT

2.3.1 Firefox on Windows

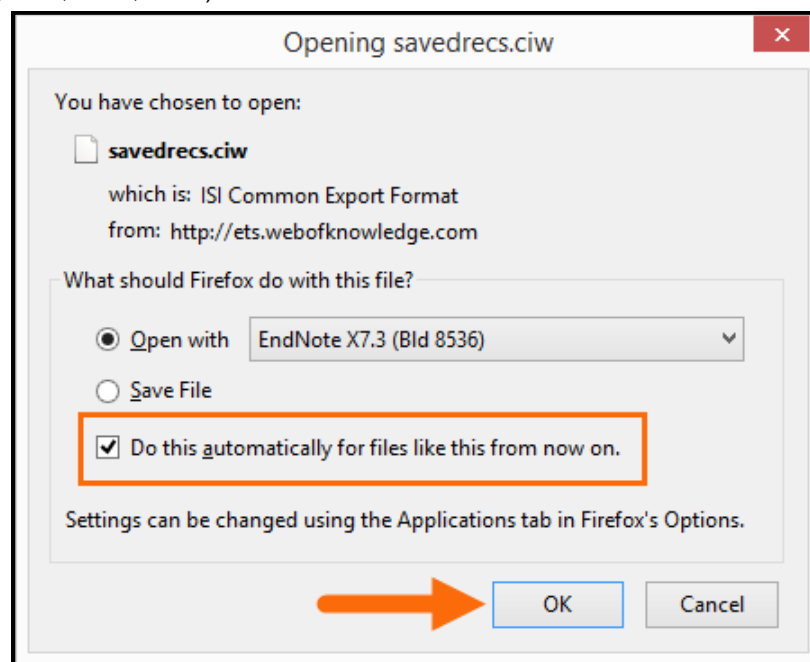
- Your EndNote library should be open before attempting to import references.
- Firefox will bring up a window like the one below the first time a new export file type attempts to download. Click the **Browse** button to select a program to open the file with. In older versions of Windows or if you have selected the EndNote program before, you might see a drop-down list of programs.



- Select the **EndNote** program to open the file in EndNote, then click the **OK** button.



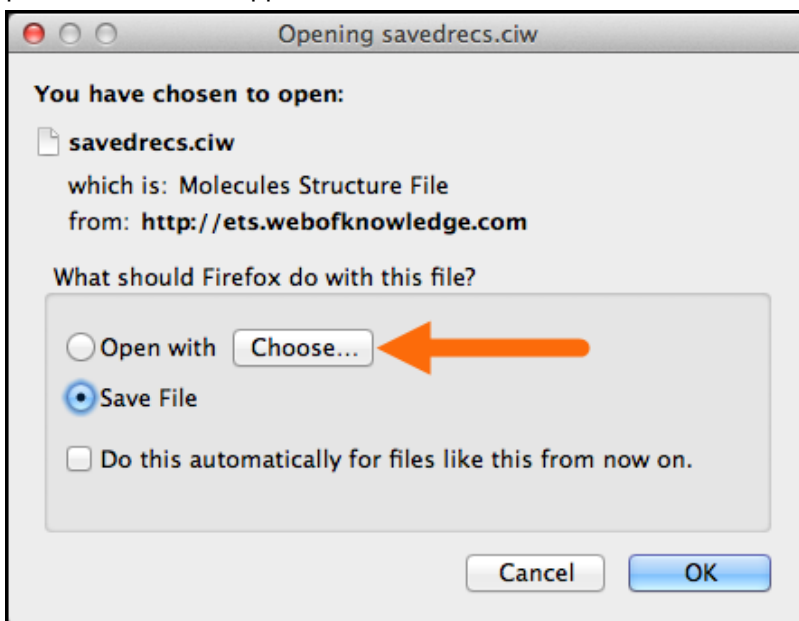
- When returned to the window below, you may select the option to **Do this automatically for files like this from now on**. Please note there are several different file types that work with direct export and you will need to go through this process for each of these file types (.ciw, .ris, .ovd, .enw, .nbib).



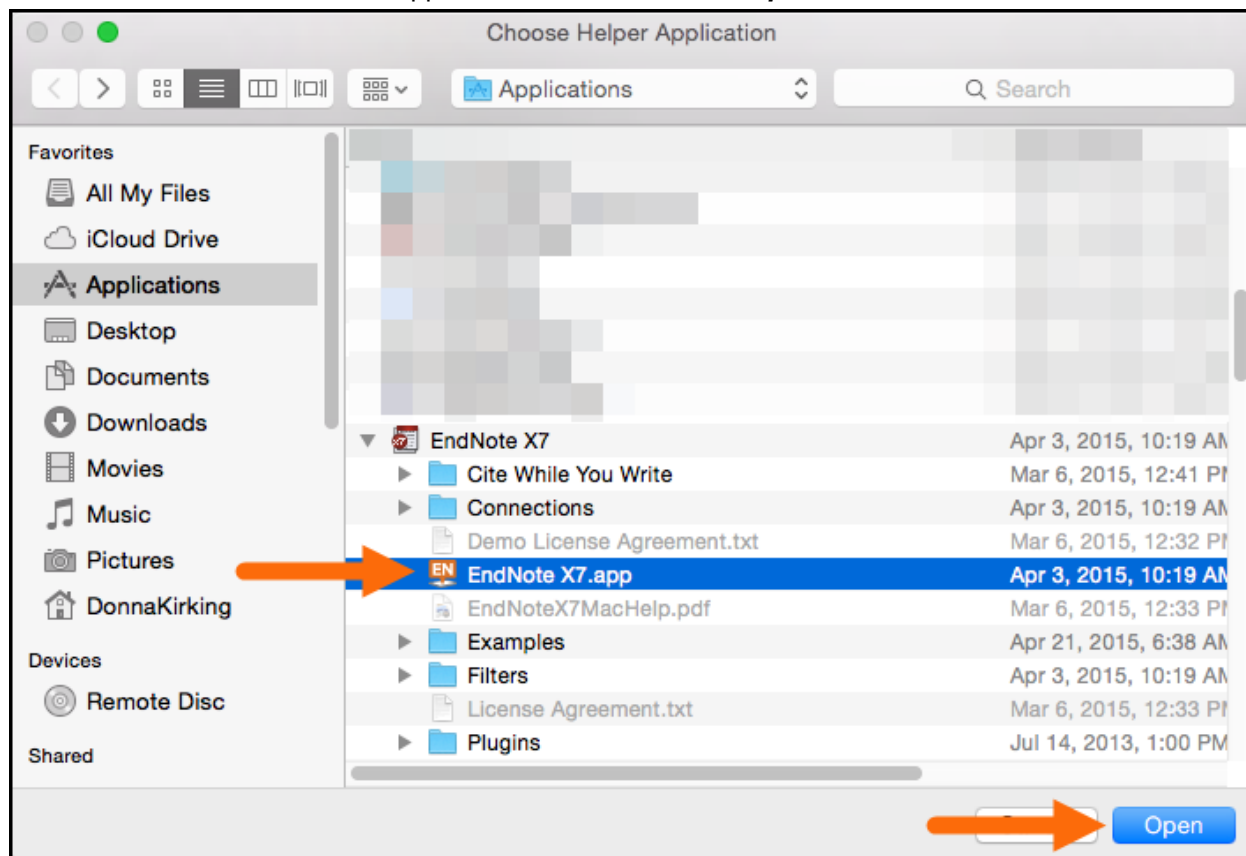
- Click the **OK** button to finish the import into EndNote.

2.3.2 Firefox on Macintosh

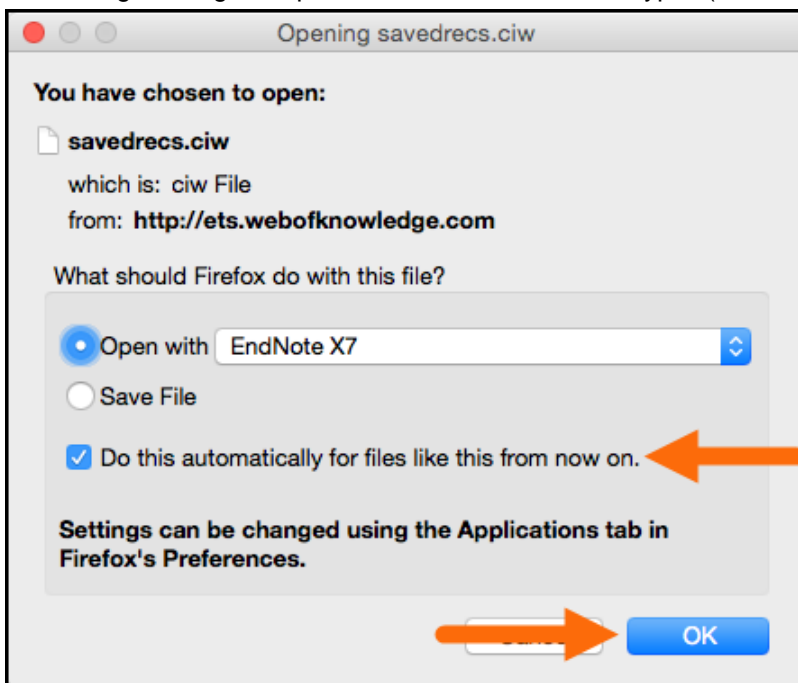
- Your EndNote library should be open before attempting to import references.
- There is a known issue with direct export and EndNote libraries saved as a package (.enlp) on the Mac for some versions of EndNote. EndNote may ask you to select a library even though your library is already open when importing. Clicking “Cancel” will still import the references. Libraries not saved as packages will not have this problem. If your library is saved as a package, you can select **Save a Copy** from the **File** menu to create a copy of the file in the standard format. Do not select the option to save the copy as a package when prompted for the copy’s name and location. After creating your copy, use the copy as your new EndNote library instead of the packaged file.
- Firefox will bring up a window like the one below the first time a new export file type attempts to download. To have the file open in EndNote so the references will be imported, click the **Choose** button to open the file with an application.



- This should bring up a window like the one below. Navigate to the **Applications/EndNote** folder and select the **EndNote** application. Then click on the **Open** button.



- When returned to the window below, you may select the option to ***Do this automatically for files like this from now on.*** Please note there are several different file types that work with direct export, and you will need to go through this process for each of these file types (.ciw, .ris, .ovd, .enw, .nbib).



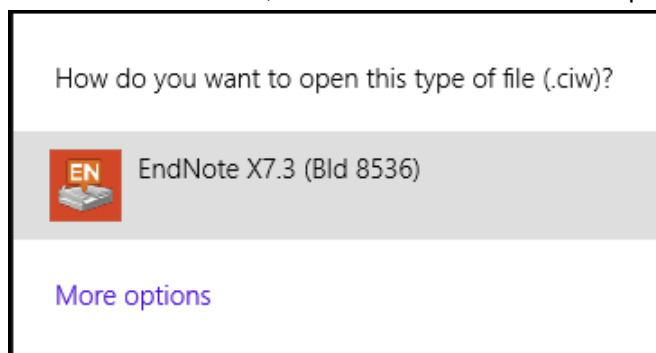
- Click the **OK** button to finish the import into EndNote.

2.3.3 Internet Explorer on Windows

- You will see a message like the one below near the bottom of your Internet Explorer window, asking if you want to open the file, save it, or cancel. Click the **Open** button and the references should be imported to EndNote.

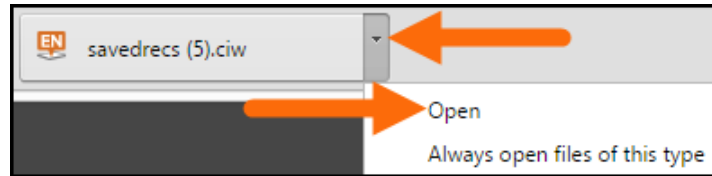


- If you see a window like the one below, click **EndNote** to finish the import.

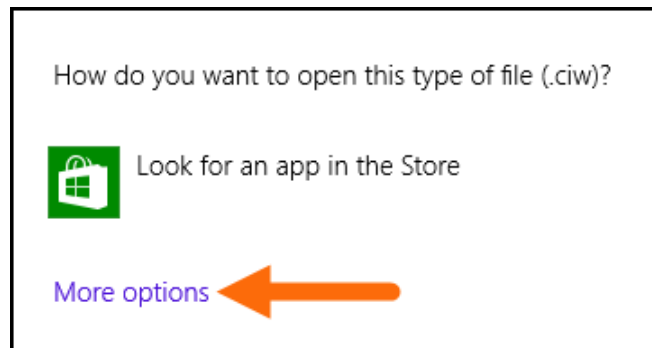


2.3.4 Google Chrome on Windows

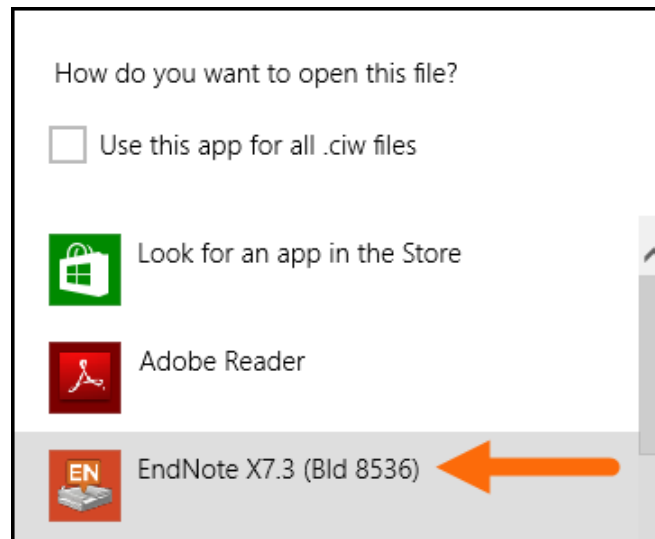
- Upon selecting the option to export from the online database, you will see the items below in the bottom left corner of the Chrome window. Select the option to **Open**. (Note that you can also select the option to **Always open files of this type** if you are absolutely sure you always want it to open those files in EndNote in the future.)



- If you see the window below, click **More options** to see a list of available programs.



- You will then see a window similar to this, showing you a list of possible programs for opening the file. Select **EndNote** from the list. (Notes: This window may be different for different versions of Windows and Chrome. If you have installed the EndNote online plug-in for Internet Explorer and have previously set this file type to open, you may not see this window in Chrome. See section 2.4.4. for more information)



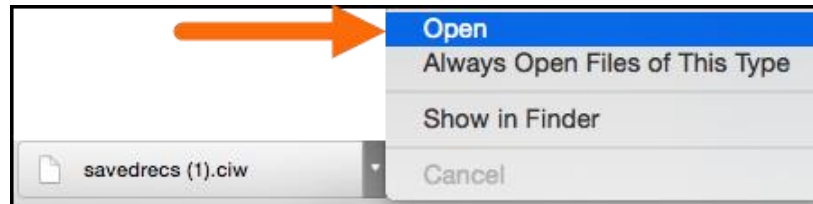
2.3.5 Google Chrome on Macintosh

The author has found the commands below to work only when using OSX 10.10, Yosemite, with Google Chrome. This has not worked with earlier versions of OSX.

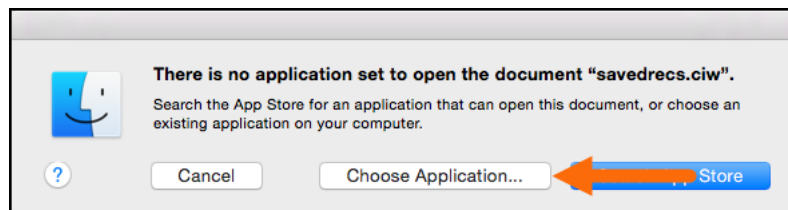
- Upon selecting the option to export from the online database, you will see the item below in the bottom left corner of the Chrome window. Click the arrow to see a list of options.



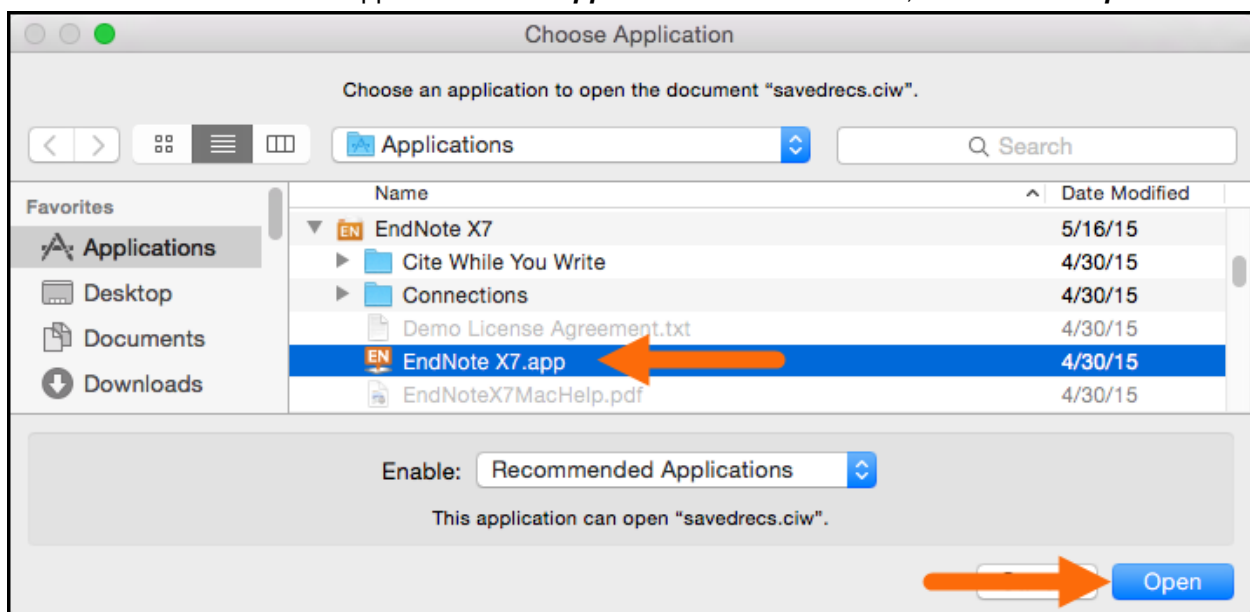
- Select the option to **Open**. (Note that you can also select the option to **Always open files of this type** if you are absolutely sure you always want it to open those files in EndNote in the future.)



- If you see the window below, click **Choose Application** to see a list of available applications.



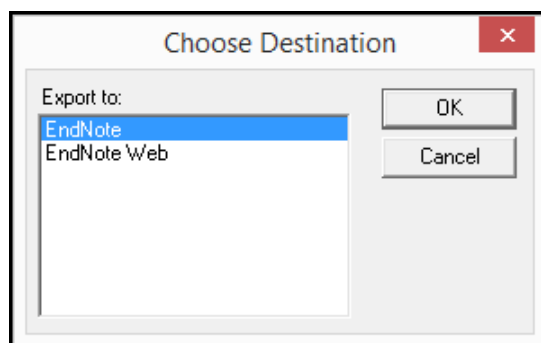
- Select the **EndNote** application in the **Applications/EndNote** folder, then click the **Open** button.



2.4 ENDNOTE ONLINE PLUG-INS FOR DIRECT EXPORT

2.4.1 Internet Explorer

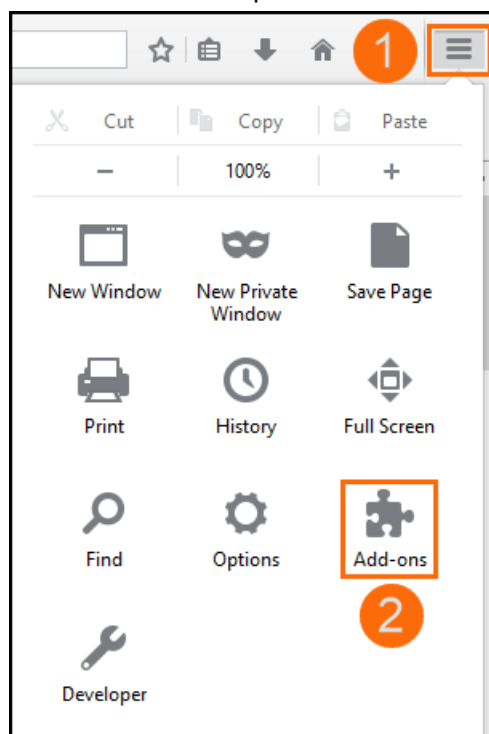
- If you have installed the EndNote online plug-in for Internet Explorer, you will see a window like the one below when you use direct export. Select **EndNote** if you want the search results sent to your EndNote desktop library. Select **EndNote Web** if you want the search results sent to your EndNote online library.



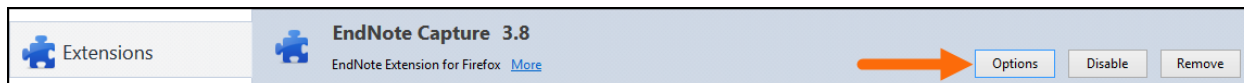
2.4.2 Firefox for Windows

If you have installed the EndNote online extension for Firefox, you will need to set the extension options to direct search results to either EndNote desktop or EndNote online.

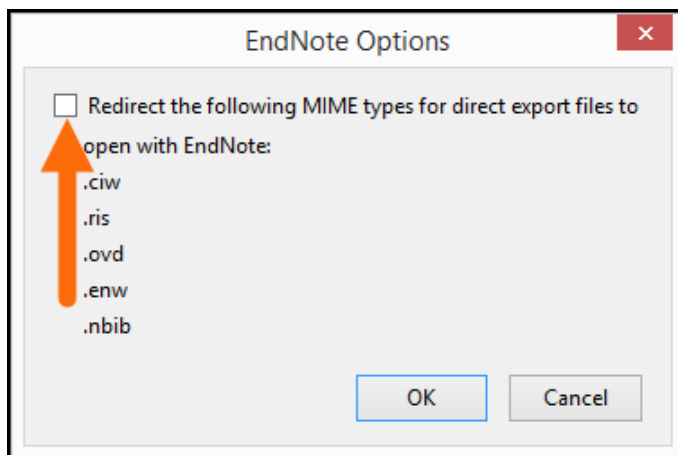
- Click 1) the **Menu** button, then 2) the **Add-ons** button whenever you want to switch between sending references to either EndNote desktop or EndNote online.



- Select the **Extensions** option at the left side of the window, then the **EndNote Capture** extension, then click the **Options** button.



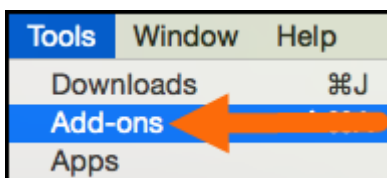
- Mark the box labeled **Redirect the following MIME types for direct export files to open with EndNote:** if you want the results to be sent to **EndNote online**. Unmark the same box if you want to be able to send the results to **EndNote desktop** as described earlier in this chapter.



2.4.3 Firefox for Macintosh

If you have installed the EndNote online extension for Firefox, you will need to set the extension preferences to direct search results to either EndNote desktop or EndNote online.

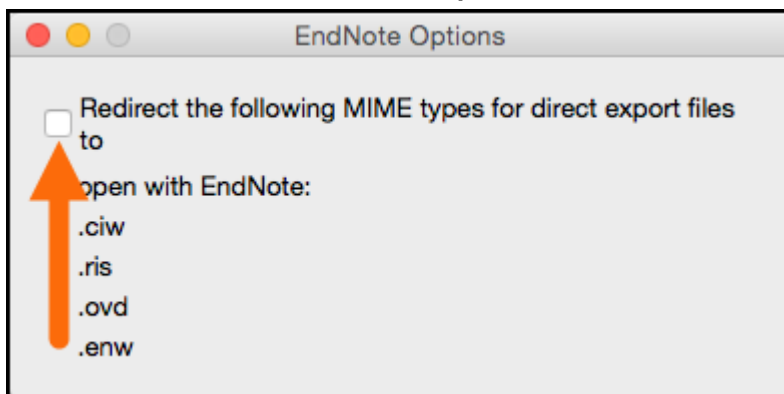
- Select **Add-ons** under the **Tools** menu whenever you want to switch between sending references to either EndNote desktop or EndNote online.



- Select the **Extensions** option at the left side of the window, then the **EndNote Capture** extension, then click the **Preferences** button.

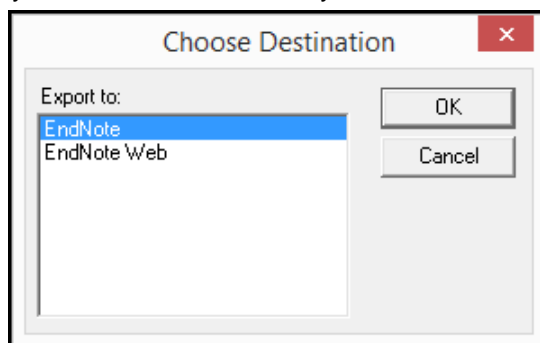


- Mark the box labeled **Redirect the following MIME types for direct export files to open with EndNote:** if you want the results to be sent to **EndNote online**. Unmark the same box if you want to be able to send the results to **EndNote desktop** as described earlier in this chapter.



2.4.4 Google Chrome

- If you have installed the EndNote online plug-in for Internet Explorer and you have set Google Chrome to **Open** file types that are used with direct export instead of save them, you will see a window like the one seen in Internet Explorer when you use direct export. Select EndNote if you want the search results sent to your EndNote desktop library. Select EndNote Web if you want the search results sent to your EndNote online library.



- If you have not installed the Internet Explorer plug-in, you will need to follow the directions in section 2.3.4.

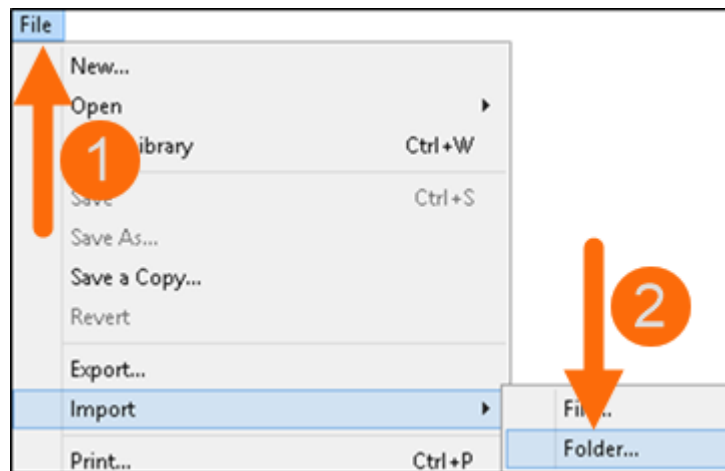
3 IMPORTING PDF FILES AND PDF HANDLING

3.1 IMPORTING PDF FILES

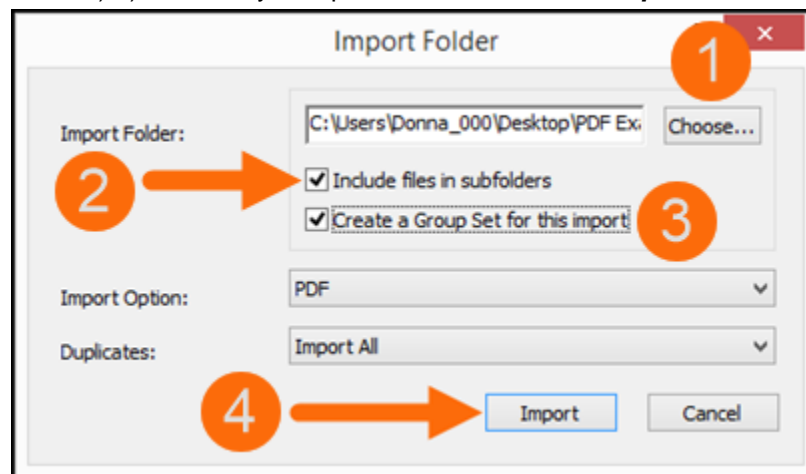
EndNote can import PDF files containing a Digital Object Identifier (DOI) in the metadata or the first two pages of the PDF. EndNote sends the DOI to PubMed and CrossRef, online databases capable of looking up reference data by DOI. The online databases send back the bibliographic information, EndNote imports it, then attaches the PDF to the record created. This means the PDF must have a DOI and EndNote must have access to the Internet during the import.

3.1.1 Importing a Folder of PDF Files on Windows

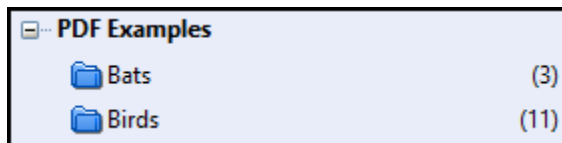
- Select 1) **Import** from the **File** menu, then 2) **Folder**.



- 1) Click the **Choose** button, navigate to the folder you want to import, and double-click on it. It will appear in the **Import Folder:** field. 2) If you wish to include subfolders within that folder, mark the box labeled **Include files in subfolders**. 3) If you want EndNote to create a separate group set for the main folder and groups within it for the subfolders, mark the box labeled **Create a Group Set for this import**. Leave the other settings at their defaults. (Note that in EndNote X7, EndNote will attempt to attach PDFs to matching records that already exist in the library instead of creating duplicate records.) 4) When all your options are set, click the **Import** button.

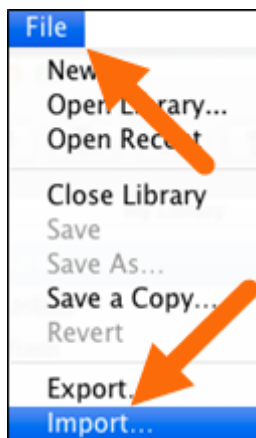


- The PDF files are imported. Below you see an example of the group set and groups that would be created for a folder called **New PDF Examples** that contained a folder called **Bats** and a folder called **Birds**.

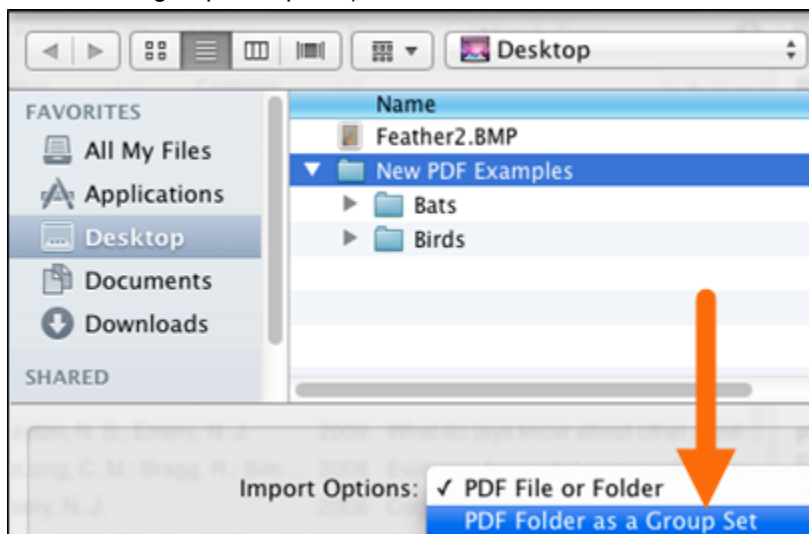


3.1.2 Importing a Folder of PDF Files on Macintosh

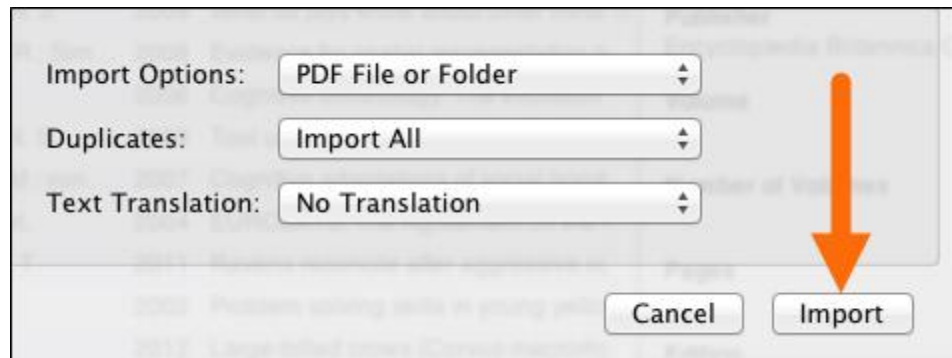
- Select **Import** from the **File** menu.



- Select **PDF File or Folder** if you do not want EndNote to create a group set and groups for the imported PDFs, or if you are only importing a single PDF. Select **PDF Folder as a Group Set** if you want EndNote to create a group set and groups for the imported PDFs. (Note: The rest of this example will show the group set option.)



- Leave the other options at the default settings and click the **Import** button. (Note that in EndNote X7, EndNote will attempt to attach PDFs to matching records that already exist in the library instead of creating duplicate records.)

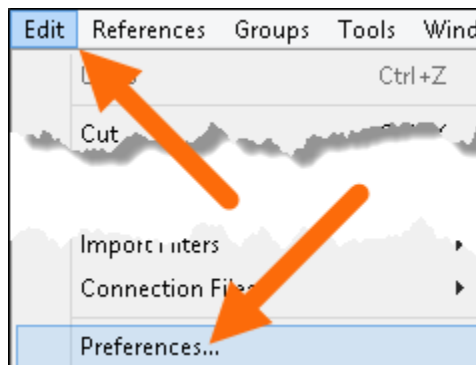


- EndNote will import the PDFs and create the group set and groups. (Example not shown.)

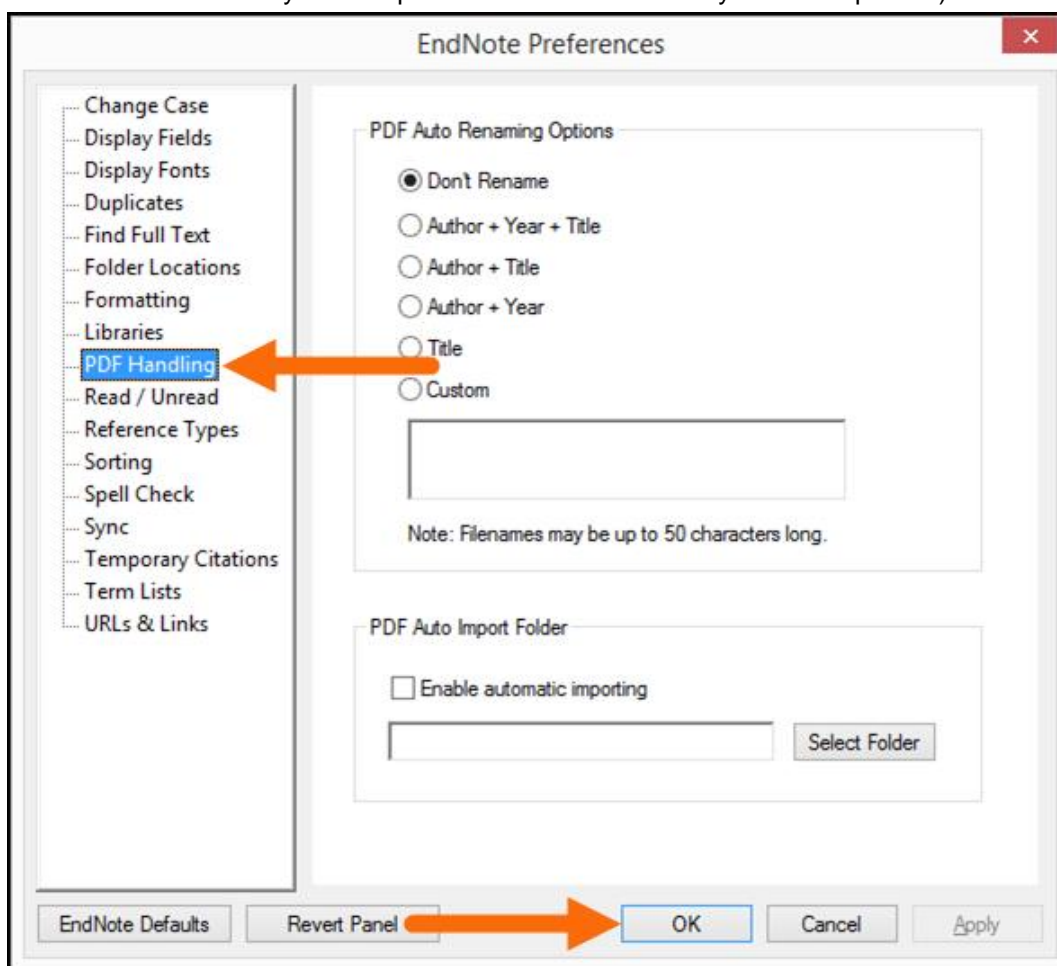
3.2 SETTING PDF HANDLING

3.2.1 Windows

- Select **Preferences** from the **Edit** menu to open the EndNote preferences panel.



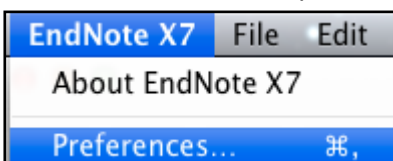
- Click the **PDF Handling** option in the preferences panel to see the window below. Here you can set automatic renaming options for PDFs you import or set a “watched” automatic importing folder. Any PDF added to the automatic importing folder will be imported into the EndNote library. Click the **OK** button when you have finished selecting your options. (Note: A folder within the automatic importing folder will be created to hold PDFs after they have been imported, so you can easily tell which files have already been imported and which have not yet been imported.)



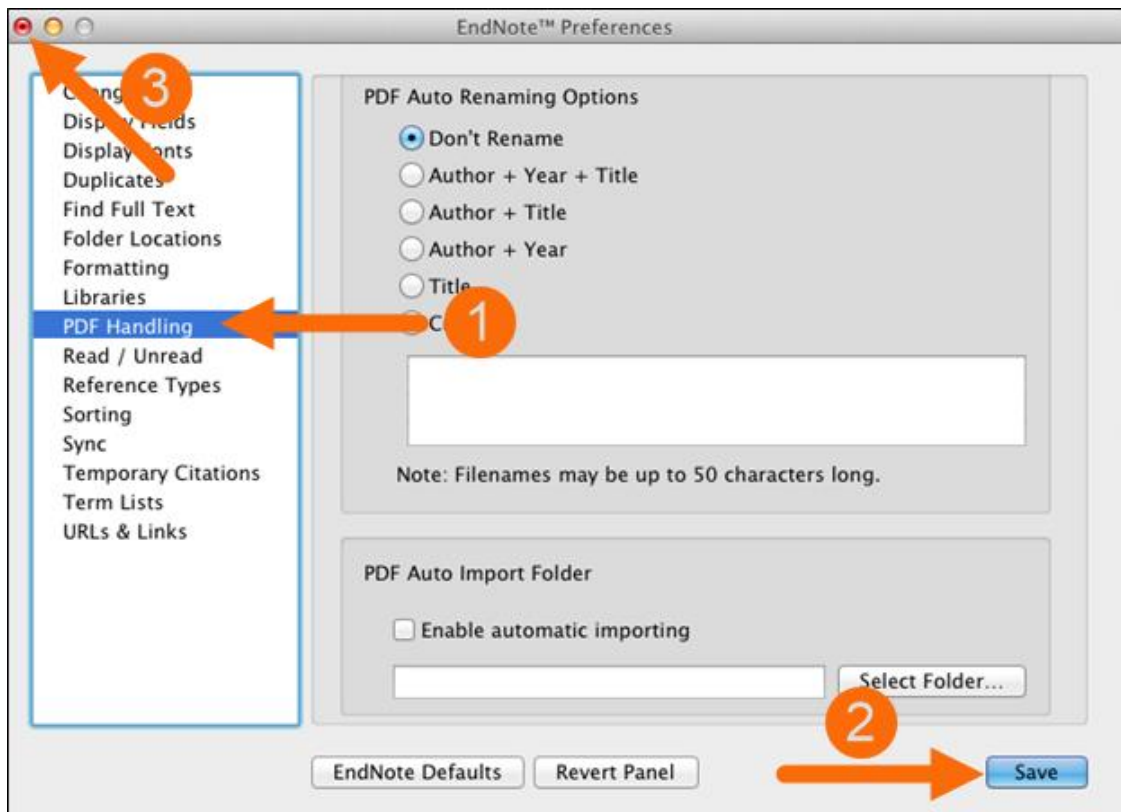
- The auto import folder will check for new PDFs when a library is opened. After opening the library, EndNote will scan for new additions to the folder on a schedule. If you continue working in EndNote and adding PDFs to the auto import folder, new PDFs added to the folder should be imported into EndNote within ten minutes of adding them to the folder, but you will need to be working in EndNote. If you have been working in another program and switch back to the EndNote window, but do not see your new additions, click on any reference in the list of references to trigger importing.

3.2.2 Macintosh

- Select **Preferences** from the **EndNote X7** menu to open the EndNote preferences panel.



- 1) Click the **PDF Handling** option in the preferences panel to see the window below. Here you can set automatic renaming options for PDFs you import or set a “watched” automatic importing folder. Any PDF added to the automatic importing folder will be imported into the EndNote library. 2) Click the **Save** button when you have finished selecting your options, then 3) close the window.



4 IMPORTING TEXT FILES

Although direct export is a very popular way of importing references from online databases, data can also be saved as a text file and then imported. Two advantages of saving a text file and then importing it are—

1. Duplicates can be filtered out during the import process, before they enter the library.
2. If the Find Full Text preferences are set to *Automatically invoke Find Full Text on newly imported references*, which is the default setting, then EndNote will automatically start searching for PDFs to match all the imported references as soon as the import is finished.

Importing works by pattern matching, so it is very important that the pattern of the data saved matches the pattern of the EndNote filter used to import it. Check the EndNote filter's **About This Filter** section for instructions for downloading data in the correct format to match the filter.

Below are instructions for saving text files from two popular databases, the Web of Science and PubMed. You may need to download the latest *Web of Science Core Collection (TR)* filter from the EndNote web site to import the PMID.

4.1 WEB OF SCIENCE

4.1.1 Saving the Data from Web of Science

The method below uses the Web of Science Marked List and will allow you to import the PubMed PMID number into the Notes field of the EndNote record if you are searching the **Web of Science Core Collection**. The instructions are the same for both Windows and Macintosh.

- Perform your search in the Web of Science Core Collection.
- Mark the records you want to save and click the **Add to Marked List** button.



- After selecting all records, click the **Marked List** button.



- In the **Marked List**, select 1) **All records in this list (up to 500)**, 2) the fields you want exported, and 3) the **Save to Other File Formats** option from the **Select Destination** drop-down list. Please note the PubMed ID field will only be available if you have limited your search to the Web of Science Core Collection.

10 records from **Web of Science™ Core Collection**
Output complete data from this product for these records.

Output Records [**Hide Output Options**]

Step 1: Select records.

1 ☒ All records in this list (up to 500)
☐ All records on page
☐ Records to

Step 2: Select content.
Select from the fields below:

2 ☐ Author(s) / Editor(s) ☒ Title
☒ Abstract* ☐ Cited References*
☒ Addresses ☒ Times Cited
☒ ISSN / ISBN ☒ Cited Reference Count
☒ IDS Number ☒ Language
☒ Funding Information ☒ Accession Number

Step 3: Select destination. [\[Learn about saving to bibliographic software\]](#)

☒ Source ☒ Document Type
☒ Keywords ☒ Source Abbrev.
☒ Web of Science Categories ☒ Page Count / Chapter Count
☒ Author Identifiers ☒ Research Areas
☒ PubMed ID

3 Save to EndNote online
Save to EndNote desktop
Save to ResearcherID - I wrote these
Save to FECYT CVN
Save to InCites
Save to Other File Formats
Save to RefWorks

*Selecting these items will increase the processing time.

- In the window below, select 1) **Other Reference Software**, then click the **Send** button.

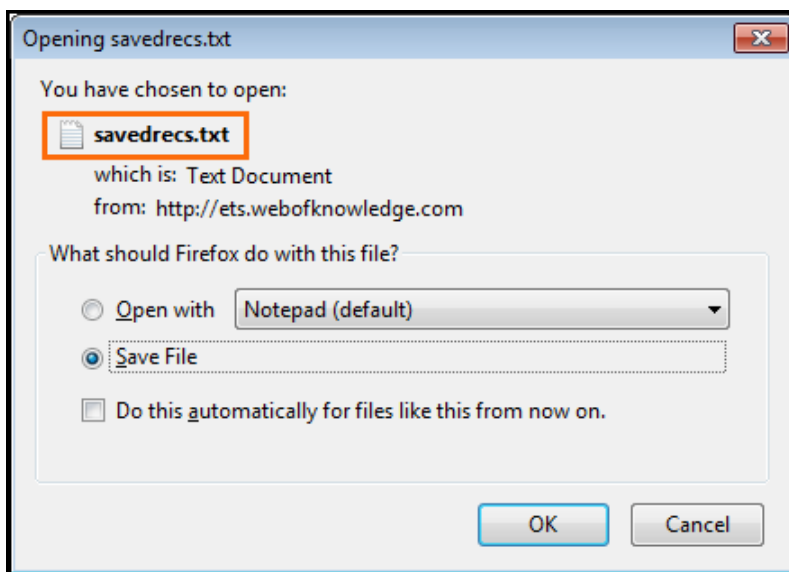
Send to File [X]

10 records selected

File Format **Other Reference Software** **1**

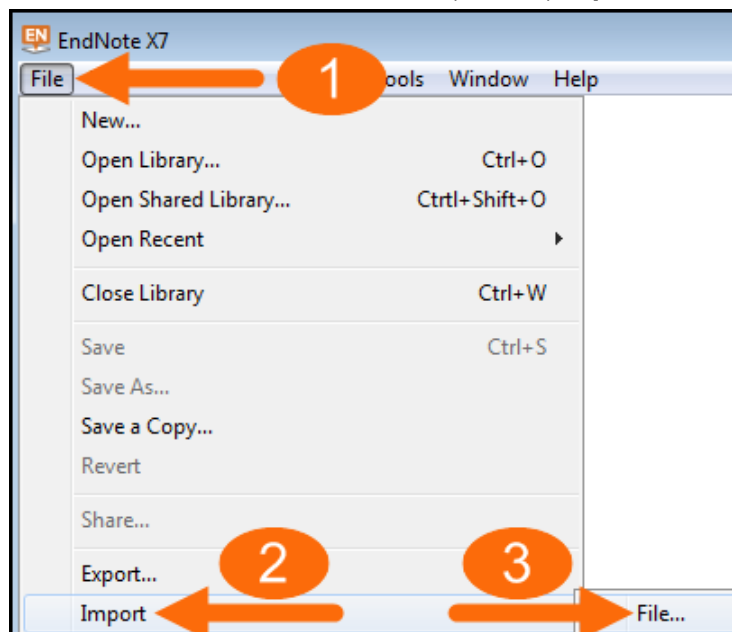
Send **2**

- If you see a window asking if you want to save the file or open it, such as the example below, save the file. Make a note of the location the file is saved in, EndNote will not know the location. Note that files saved in this way from the Web of Science have the default name **savedrecs.txt**. This file can be emailed to another EndNote user as an attachment for import, if desired. It is just a plain text document.

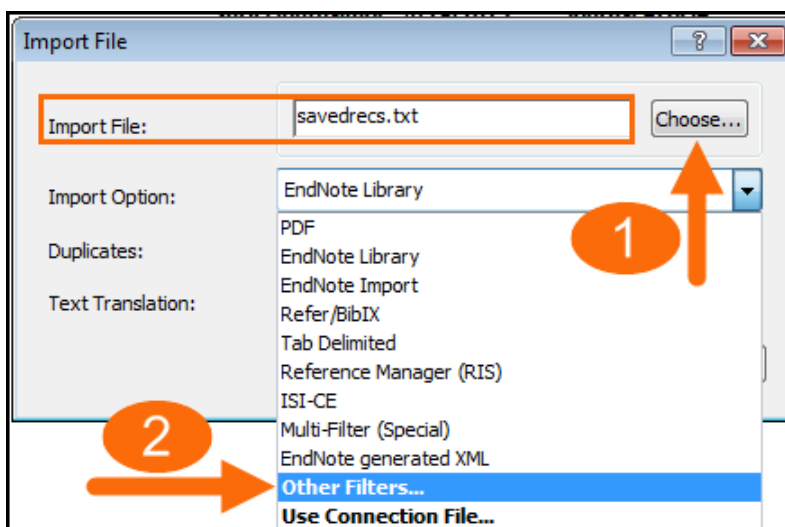


4.1.2 Importing the Web of Science File on Windows

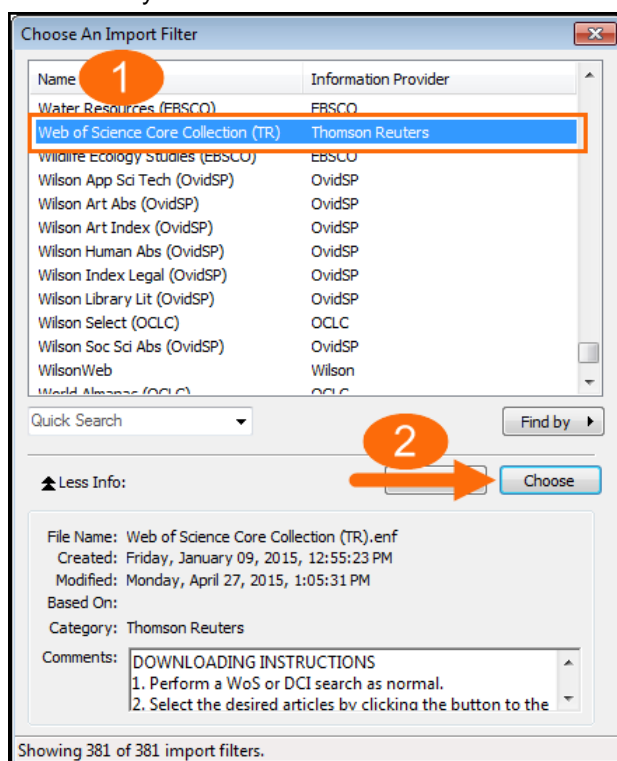
- To import the file into EndNote, in EndNote select 1) **File**, 2) **Import**, then 3) **File**.



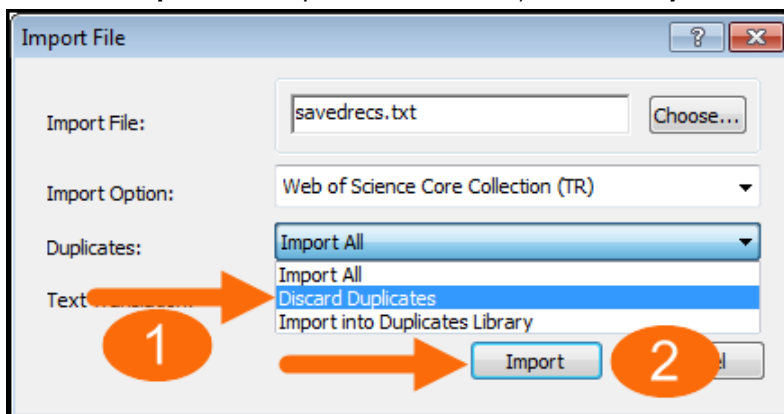
- In the window below, 1) click the **Choose** button and select the **savedrecs.txt** file to open. You will need to know where you saved the file. Then 2) select **Other Filters** from the drop-down **Import Option** list. Note that after a filter has been used once, it will appear in the drop-down list in the future.



- In the window below select 1) the **Web of Science Core Collection (TR)** filter, then click the **Choose** button. (Please note you will need the latest Web of Science Core Collection (TR) filter.)



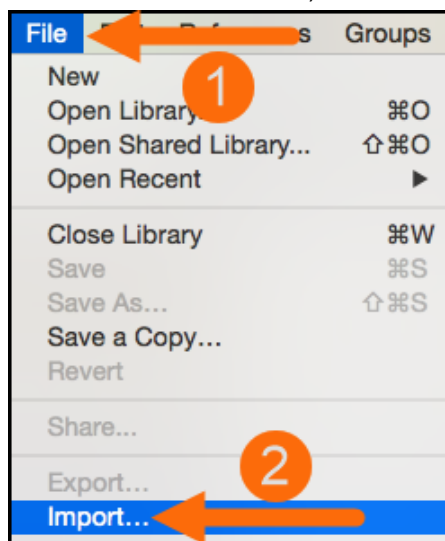
- If you think you might import duplicates of some of the references in your library, 1) choose **Discard Duplicates** from the **Duplicates** drop-down list, then 2) click the **Import** button.



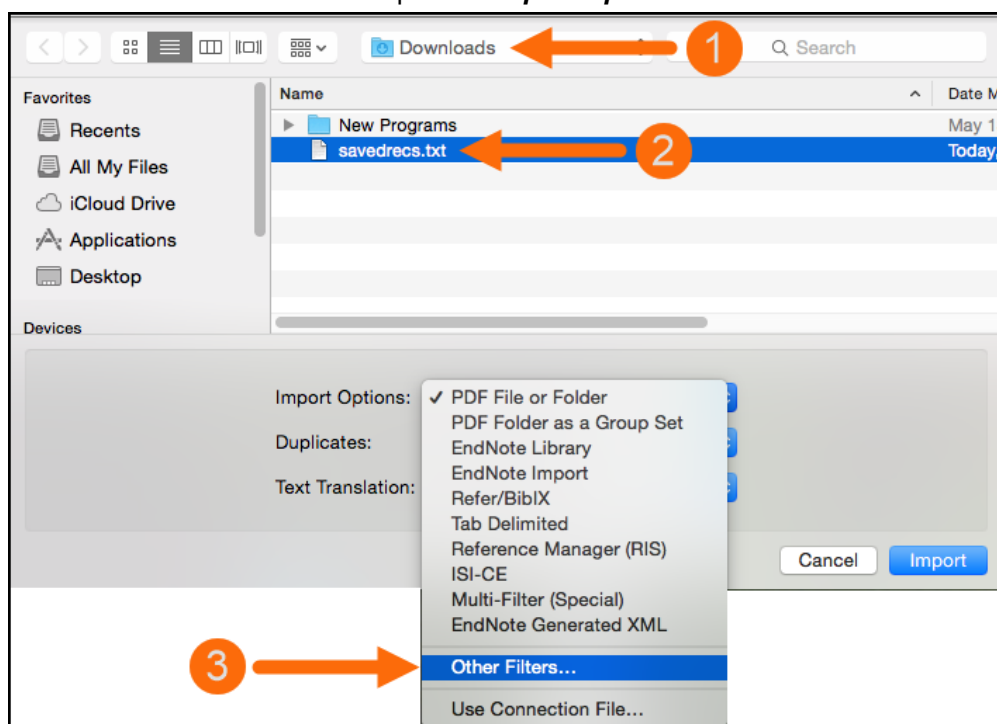
- The references will be imported into EndNote and appear in the **Imported References** group. The PMID will appear in the Notes field as a number.

4.1.3 Importing the Web of Science File on Macintosh

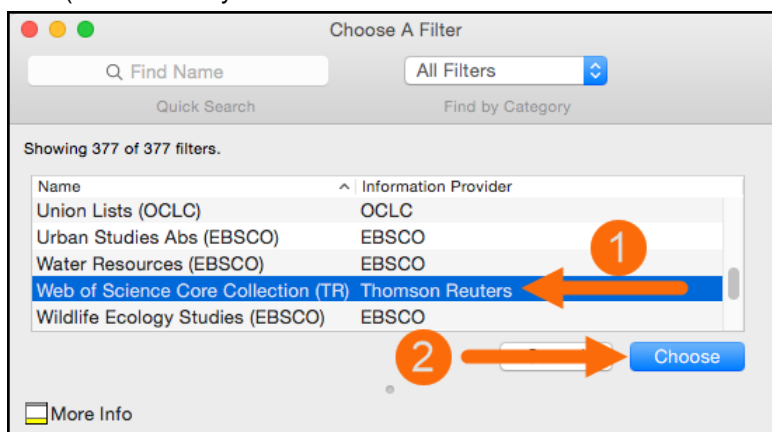
- To import the file into EndNote, in EndNote select 1) **File**, then 2) **Import**.



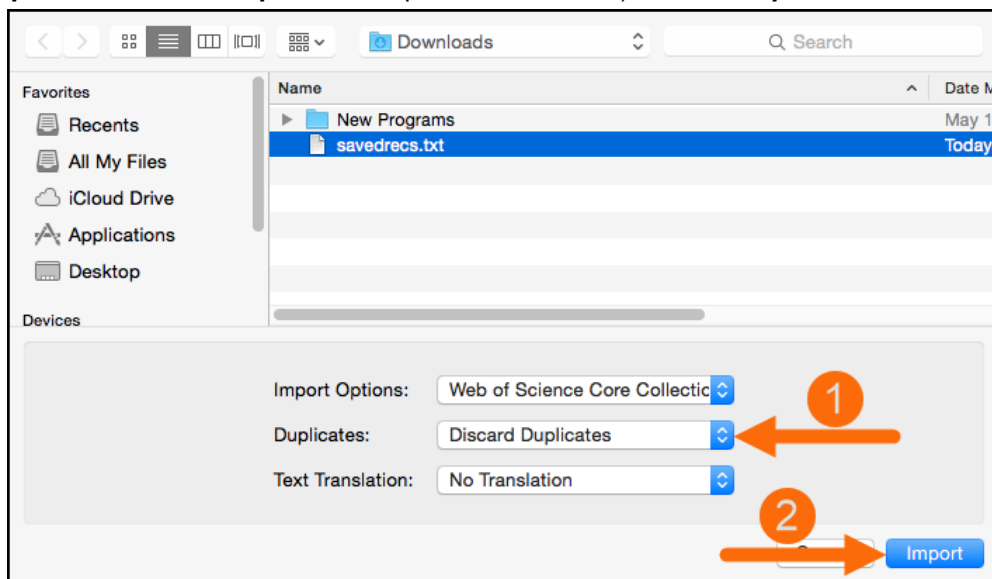
- In the window below, 1) select the folder the file was saved in, 2) select the downloaded file, and 3) select **Other Filters** from the drop-down **Import Options** menu.



- In the window below select 1) the **Web of Science Core Collection (TR)** filter, then click the **Choose** button. (Please note you will need the latest Web of Science Core Collection (TR) filter.)



- If you think you might import duplicates of some of the references in your library, 1) choose **Discard Duplicates** from the **Duplicates** drop-down list, then 2) click the **Import** button.



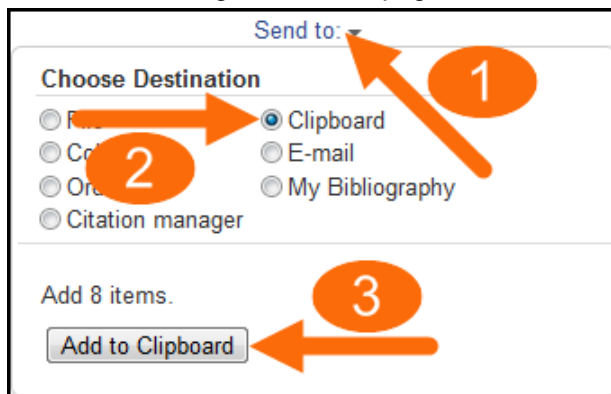
- The references will be imported into EndNote and appear in the **Imported References** group. The PMID will appear in the Notes field as a number.

4.2 PUBMED

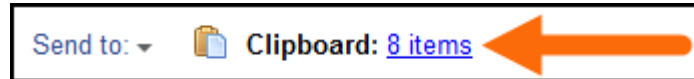
4.2.1 Saving the Data from PubMed

Direct export from PubMed will allow importing of up to 200 records at a time, while saving a text file and then importing from PubMed will allow you to import thousands of records at a time if you wish to do so, and it will allow you to filter out duplicates during the import. The directions below use PubMed's clipboard feature, but records can also be exported directly from the search results screen. Directions for saving data from PubMed are the same for Windows or Macintosh.

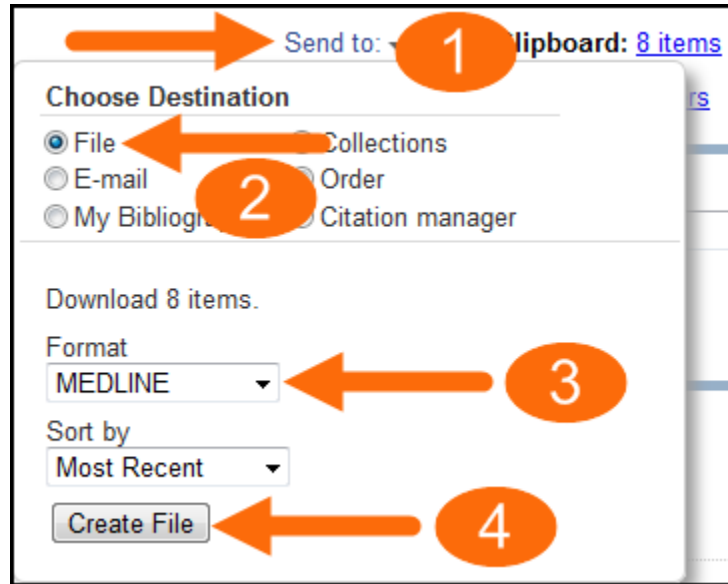
- Perform your search on PubMed's web site.
- Mark the records you wish to import and 1) click the **Send to:** button, 2) choose **Clipboard** as the destination, and 3) click the **Add to Clipboard** button. This will add the selected references on the page to the clipboard. You can then go to the next page and select more references.



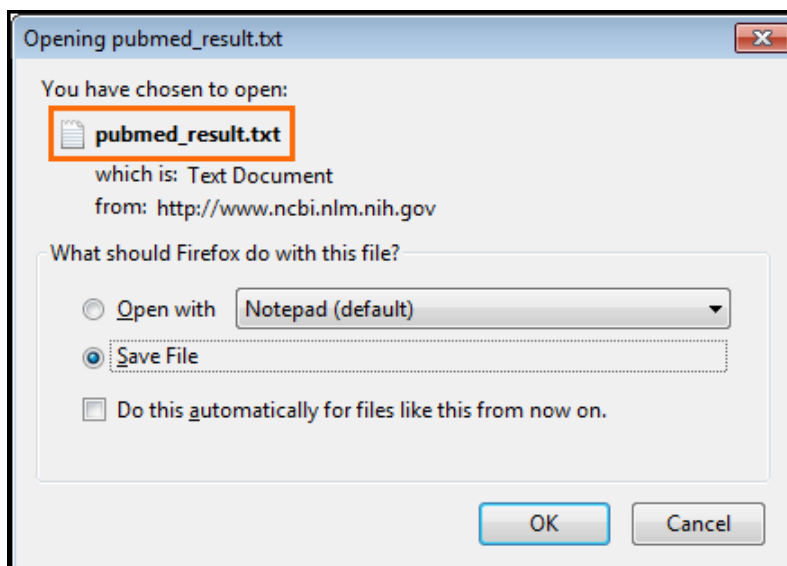
- When finished selecting references, click the link showing the number of items in the Clipboard, to the right of the **Send to:** button. This will take you to the Clipboard.



- In the Clipboard, 1) click the **Send to:** button, 2) select **File** under **Choose Destination**, 3) select **MEDLINE** as the **Format**, and 4) click the **Create File** button. Note that if you do not select the MEDLINE format, the file will not import into EndNote correctly.

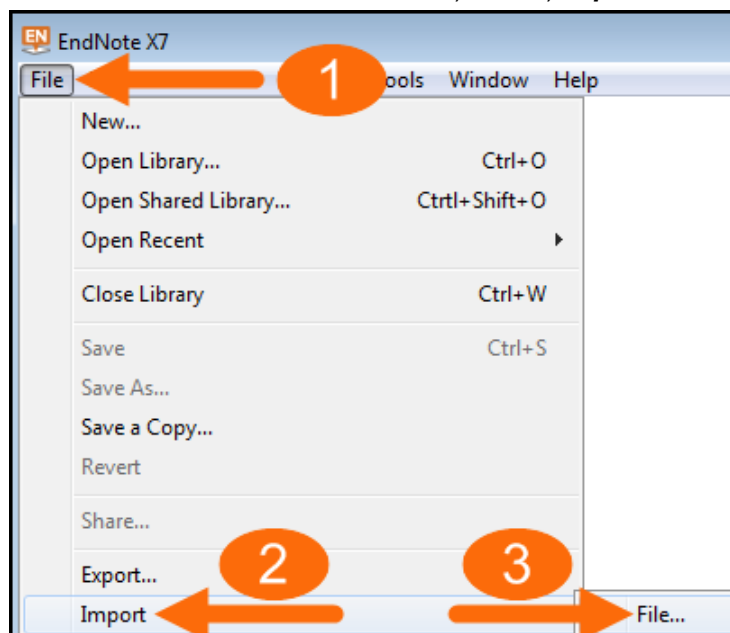


- If you see a window similar to the one below, save the file and make a note of where you saved it. The default file name for files saved from PubMed is **pubmed_result.txt**. This is a plain text file and can be emailed as an attachment.

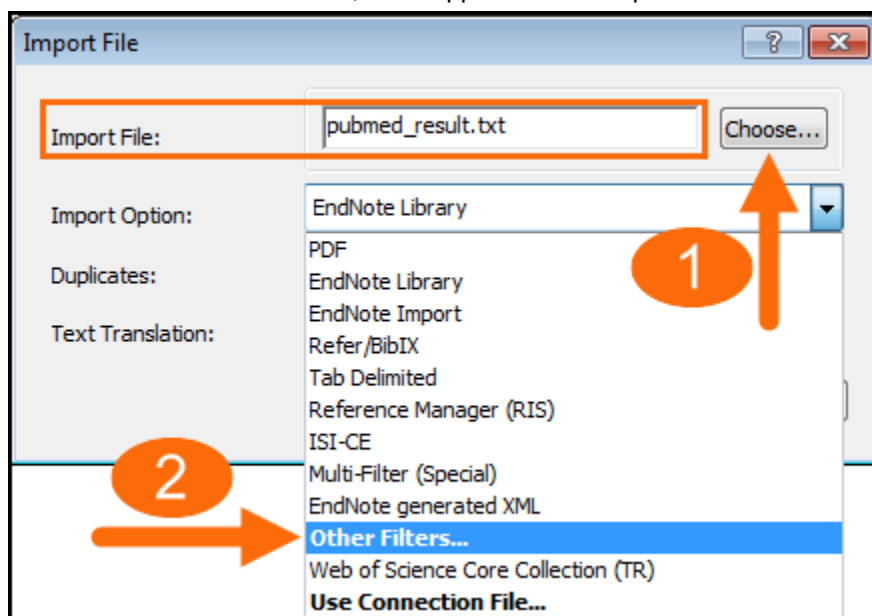


4.2.2 Importing the PubMed file on Windows

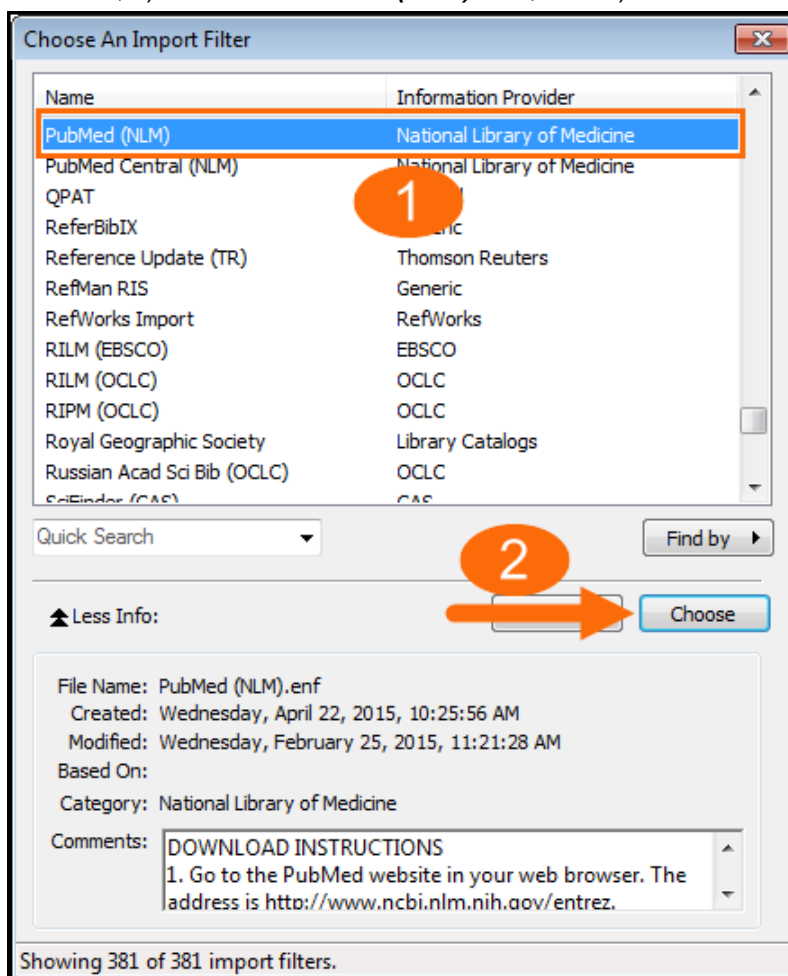
- To import the file into EndNote, in EndNote select 1) **File**, 2) **Import**, then 3) **File...**



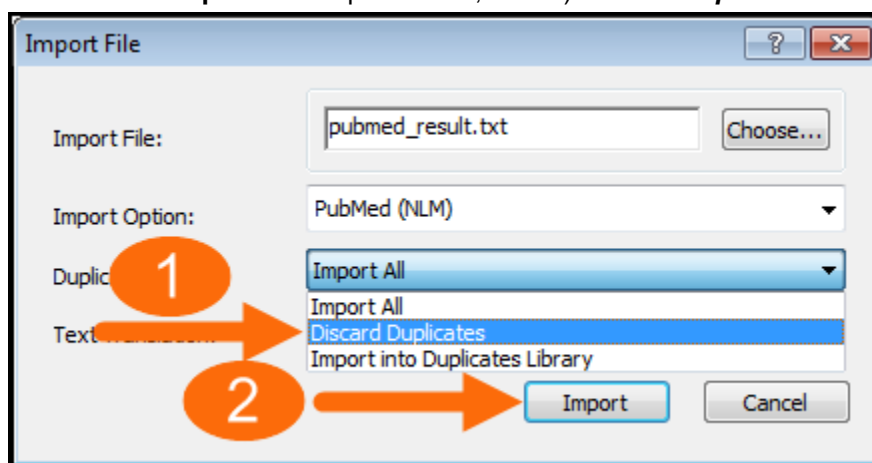
- In the window below, 1) click the **Choose** button and select the **pubmed_result.txt** file. You will need to know where you saved the file. Then 2) select **Other Filters** from the drop-down list. Note that after a filter has been used once, it will appear in the drop-down list in the future.



- In the window below, 1) select the **PubMed (NLM)** filter, then 2) click the **Choose** button.



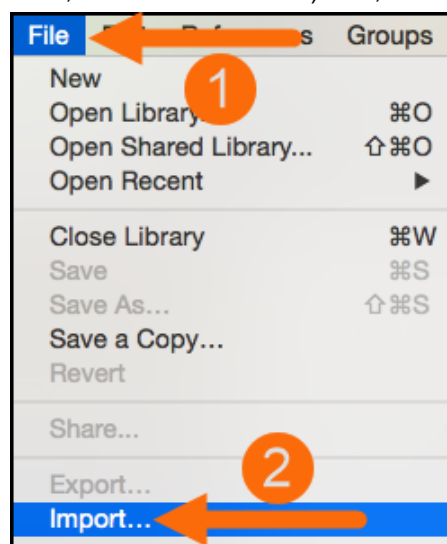
- If you think you might import duplicates of some of the references in your library, 1) choose **Discard Duplicates** from the **Duplicates** drop-down list, then 2) click the **Import** button.



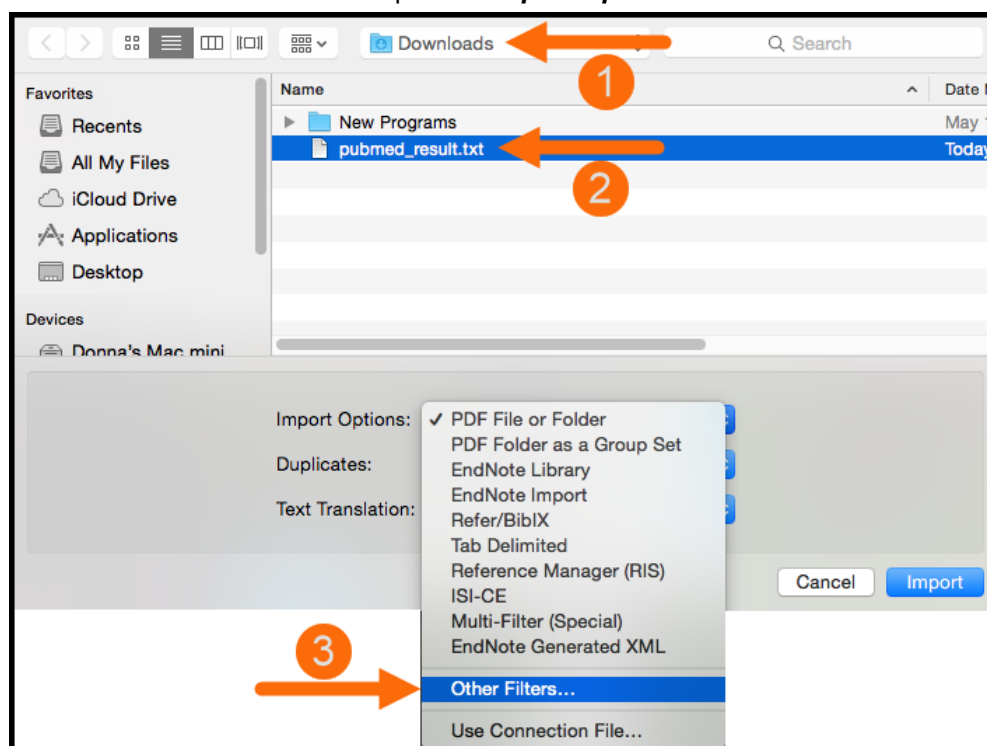
- The references will be imported into EndNote and appear in the **Imported References** group. The PMID will appear in the Accession Number field.

4.2.3 Importing the PubMed File on Macintosh

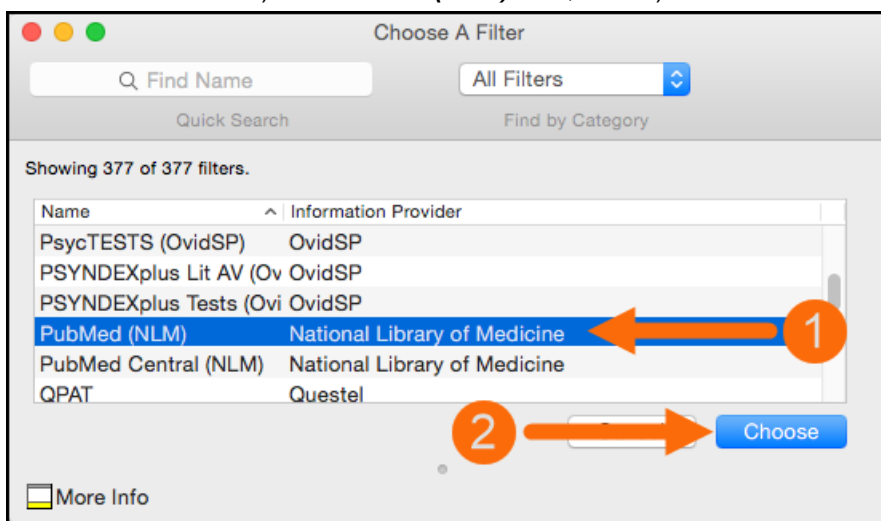
- To import the file into EndNote, in EndNote select 1) **File**, then 2) **Import**.



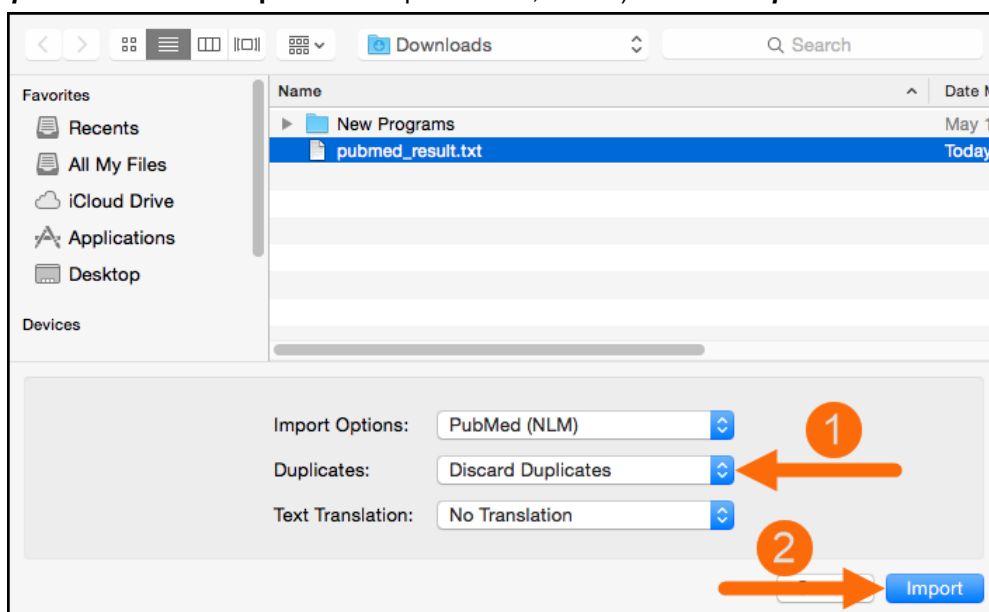
- In the window below, 1) select the folder the file was saved in, 2) select the downloaded file, and 3) select **Other Filters** from the drop-down **Import Options** menu.



- In the window below select 1) the **PubMed (NLM)** filter, then 2) click the **Choose** button.



- If you think you might import duplicates of some of the references in your library, 1) choose **Discard Duplicates** from the **Duplicates** drop-down list, then 2) click the **Import** button.



- The references will be imported into EndNote and appear in the **Imported References** group. The PMID will appear in the Accession Number field as a number.

5 ENDNOTE ONLINE

EndNote lets you work on your desktop, online, or on an iPad. This chapter cannot cover everything EndNote can do online, but it will show you how using plug-ins and capture features of EndNote online can help you even if you prefer to work on the desktop.

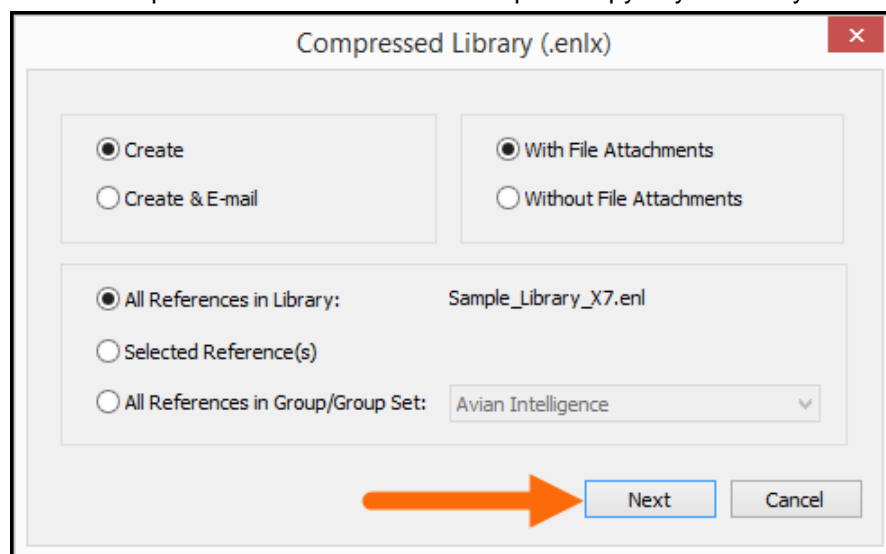
Whether you are upgrading from EndNote basic (online only, with a limited feature set) and merging that library with your desktop library, or creating an online library for the first time, you need to start by setting up EndNote Sync to keep all your references and custom groups up to date on both the desktop and online.

5.1 SET UP ENDNOTE SYNC

5.1.1 Back Up the EndNote Desktop Library

First, you should make a complete backup copy of your desktop library by saving a compressed library. Note that EndNote may ask if you want to make a backup when you begin syncing, but you can do it manually in advance using the method below.


- Select **Compressed Library** from the **File** menu in EndNote. You should see a screen like the one below. Leave the options as shown to save a complete copy of your library with all attachments.



- Click on the **Next** button to select a location to save the file. This will bring up a standard “save” dialog window.
- Select the location and click the **Save** button. It may take some time to compress and save a large library, so be patient.
- Note that although you cannot safely keep a working EndNote desktop library in cloud services such as Dropbox, you can keep a compressed library in the cloud for backup purposes. See section **7.5** for more information.

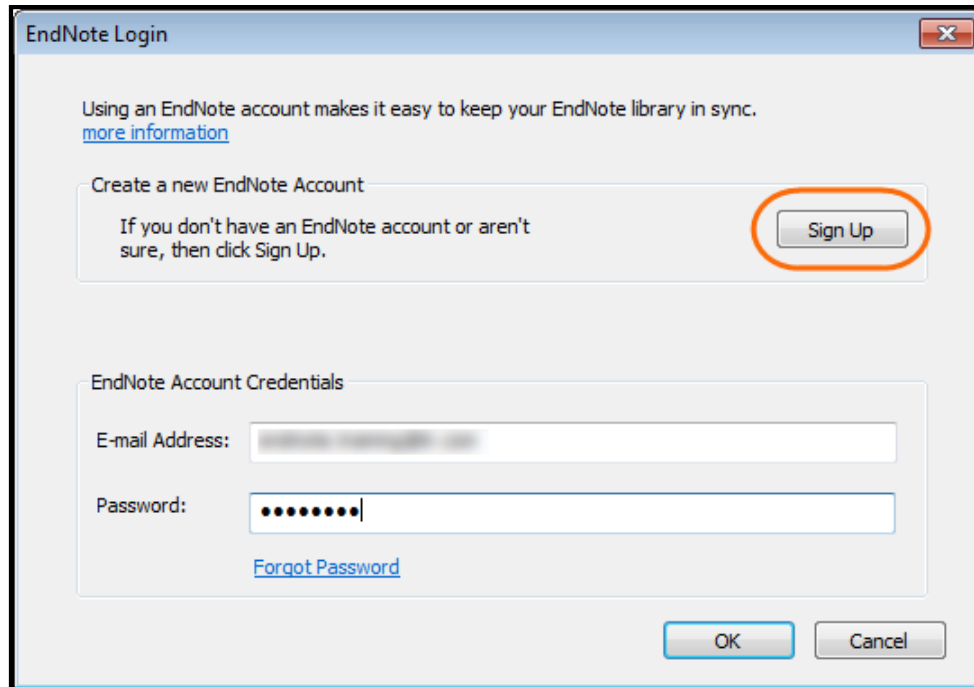
5.1.2 EndNote Sync

- If you have not already synced your EndNote desktop and online library references, click the **Sync** button to sync for the first time. (Note that you may be asked if you want to create a compressed library as a backup if it is the first time the library has been synced on that computer.)

Sync button for Windows: 

Sync button for Macintosh: 

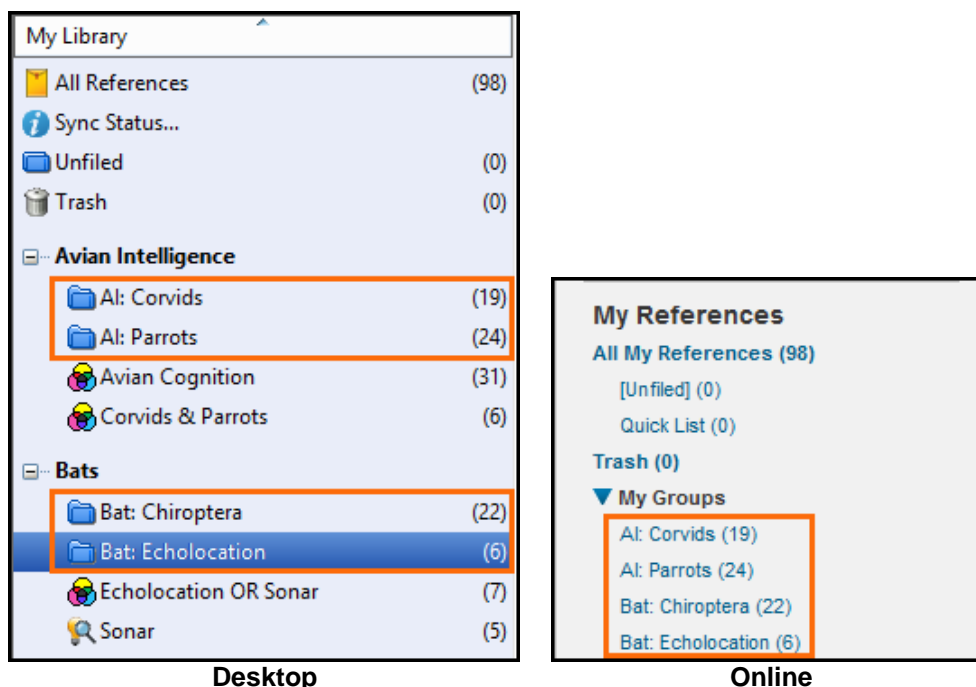
- If you already have an EndNote online or basic account, use that account's logon information, as in the example shown below. If you do not have an EndNote online account, you can create one by clicking the **Sign Up** button (circled below). Click the **OK** button to start the sync.



The image shows the 'EndNote Login' dialog box. It has a title bar with 'EndNote Login' and a close button. The main text says 'Using an EndNote account makes it easy to keep your EndNote library in sync.' with a link to 'more information'. Below this is a section titled 'Create a new EndNote Account' with the text 'If you don't have an EndNote account or aren't sure, then click Sign Up.' and a 'Sign Up' button that is circled in orange. Below that is a section titled 'EndNote Account Credentials' with fields for 'E-mail Address' and 'Password'. The password field is masked with dots. There is a 'Forgot Password' link below the password field. At the bottom right are 'OK' and 'Cancel' buttons.

- During the first sync, all references in both the EndNote desktop and online libraries will be copied to the other library, as well as all group information, but only custom groups will be displayed in EndNote online. So there may be duplicates and some library clean-up necessary. After the first sync, any change made in **any** synchronized library will be reflected in **all** synchronized copies of the library. ***This means if you delete references in EndNote online or EndNote on the desktop, those references will be deleted in both.***

- Group sets will not show online, but the information will be synced through online to a second desktop computer, where they will show. Because they do not show online, you may wish to use short prefixes before custom group names to ensure custom groups that belong together remain together online, as shown in the example below.



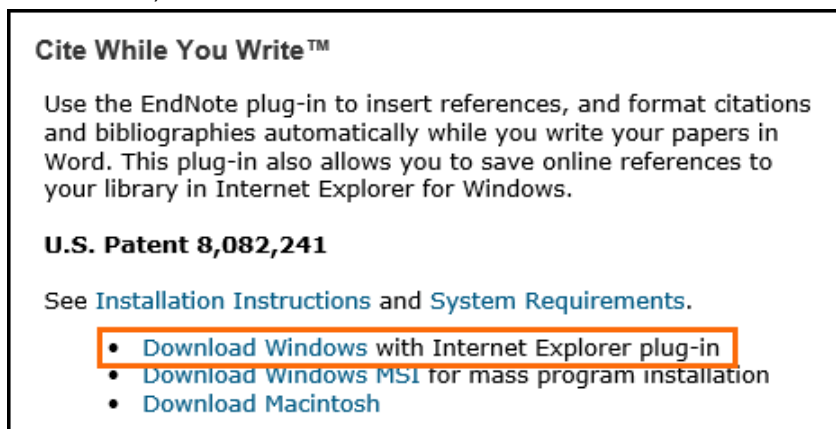
- Although it is possible to create an EndNote online account and not synchronize it to an EndNote desktop library, syncing will allow you to easily keep the same set of references in both libraries.
- After syncing an EndNote library, you can begin sharing groups to collaborate with others. See section 7.3 for more information on this.

5.2 INSTALLING THE INTERNET EXPLORER PLUG-IN

5.2.1 From within Internet Explorer

- In Internet Explorer, on the EndNote online web site, select **Download Installers** from the **Options** tab or the bottom of any EndNote online screen.

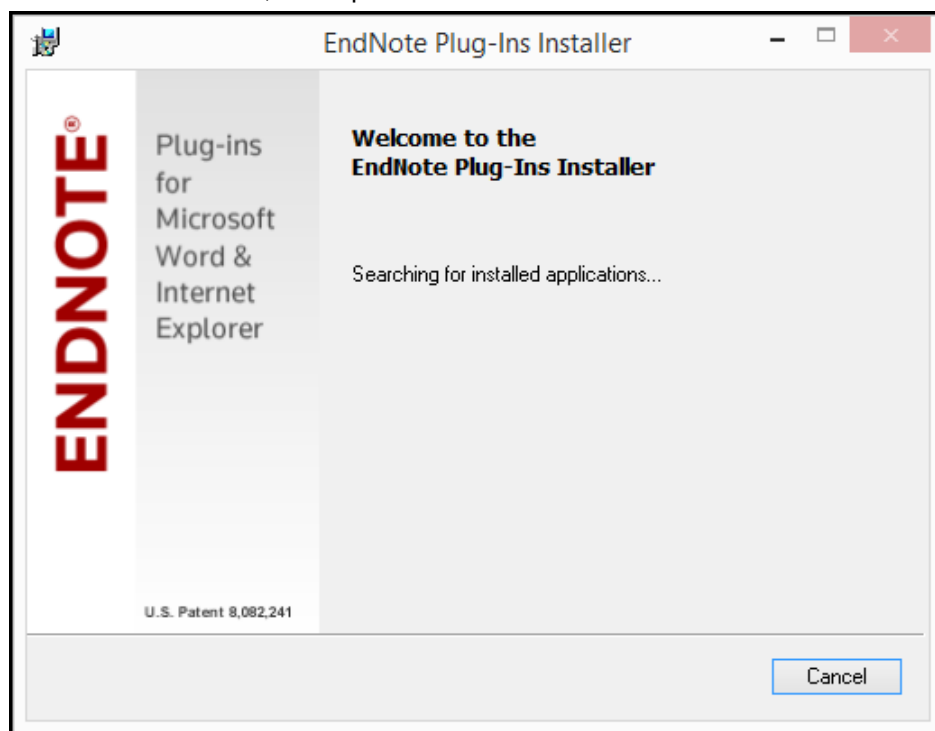
- Select **Download Windows with Internet Explorer plug-in** under the **Cite While You Write** section (circled below).



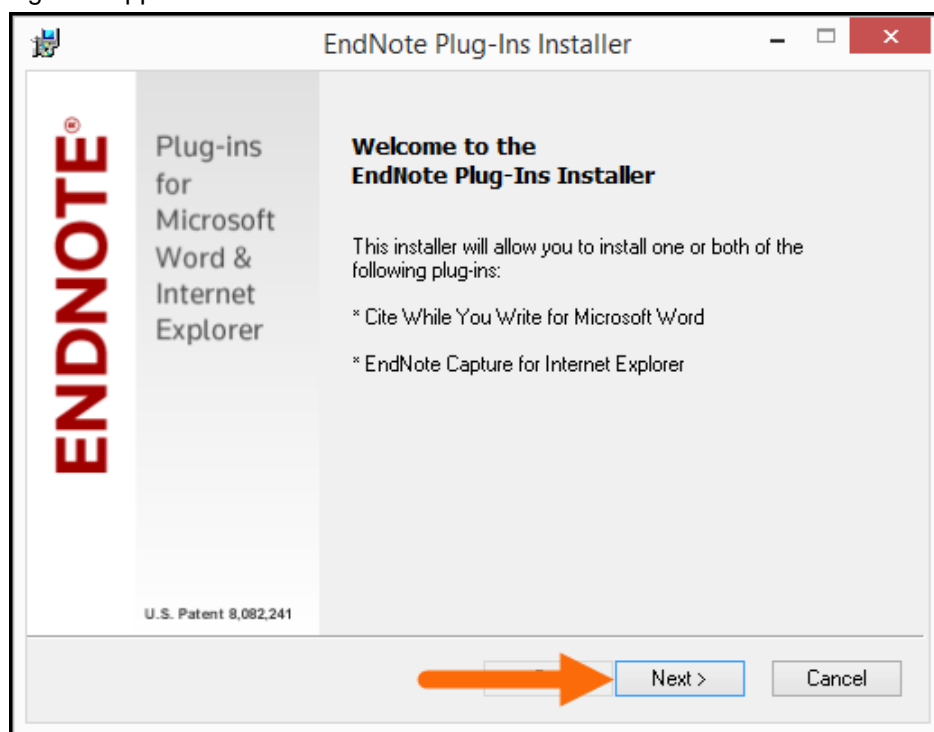
- Click the **Run** button to begin the installation. Internet Explorer is still open.



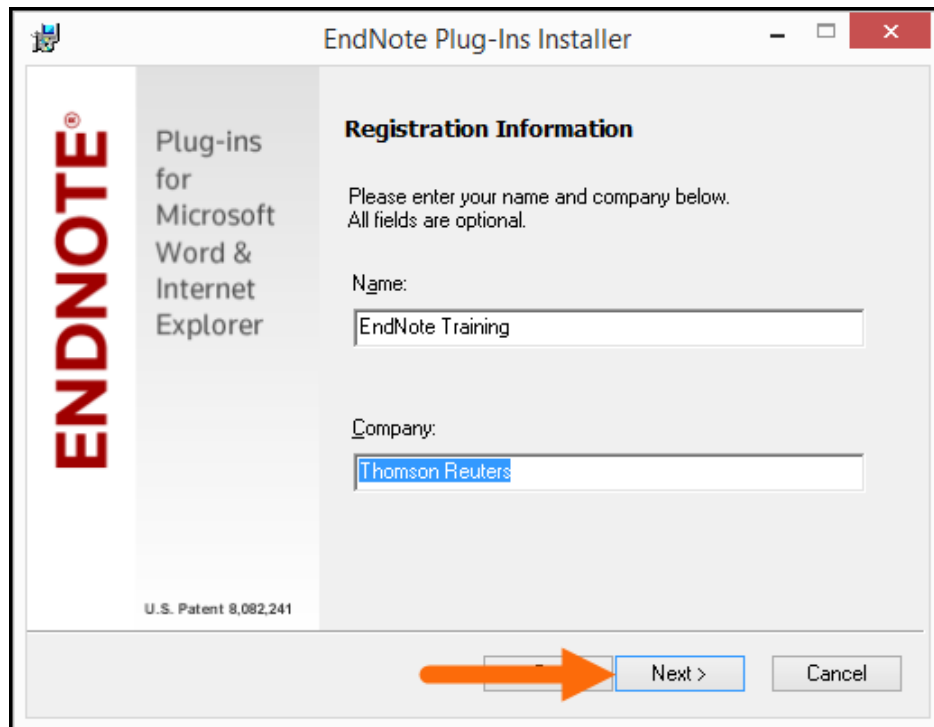
- You will see a message that the installer is searching for installed applications. This message may remain for several minutes, so be patient.



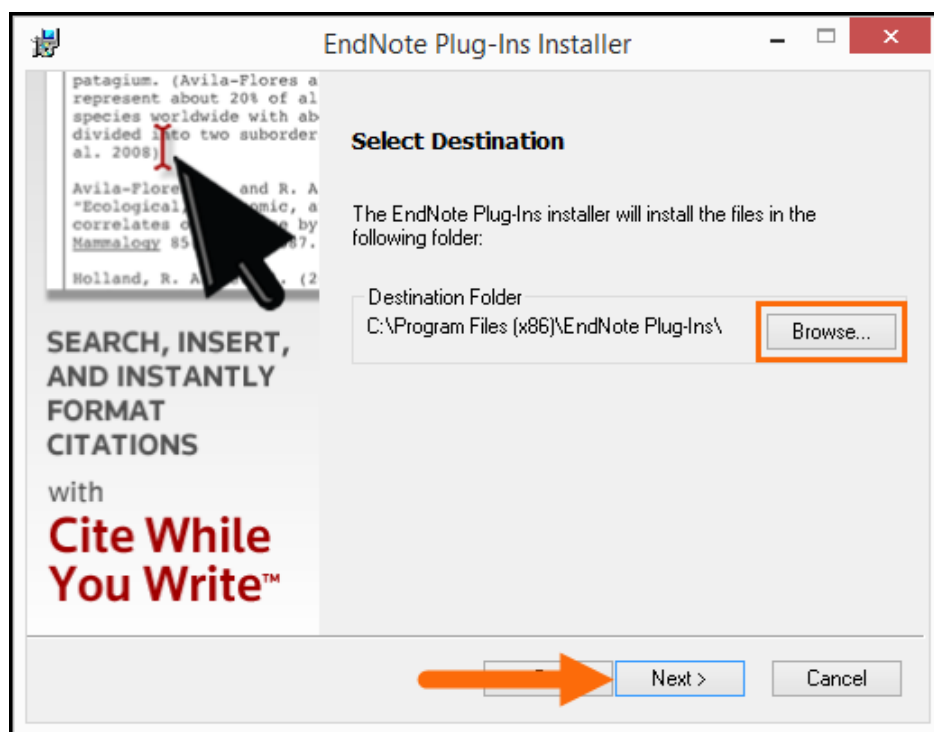
- When the installer has recognized the presence of both Internet Explorer and Microsoft Word, this message will appear. Click the **Next** button to continue.



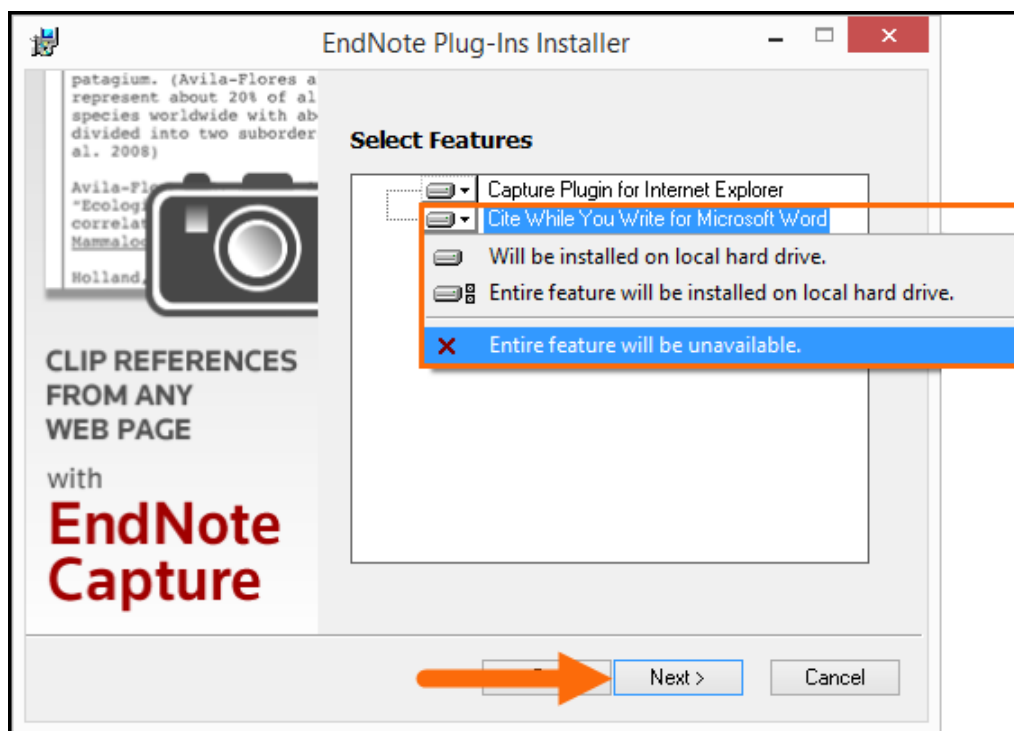
- Enter your name and company, if you wish, then click the **Next** button.



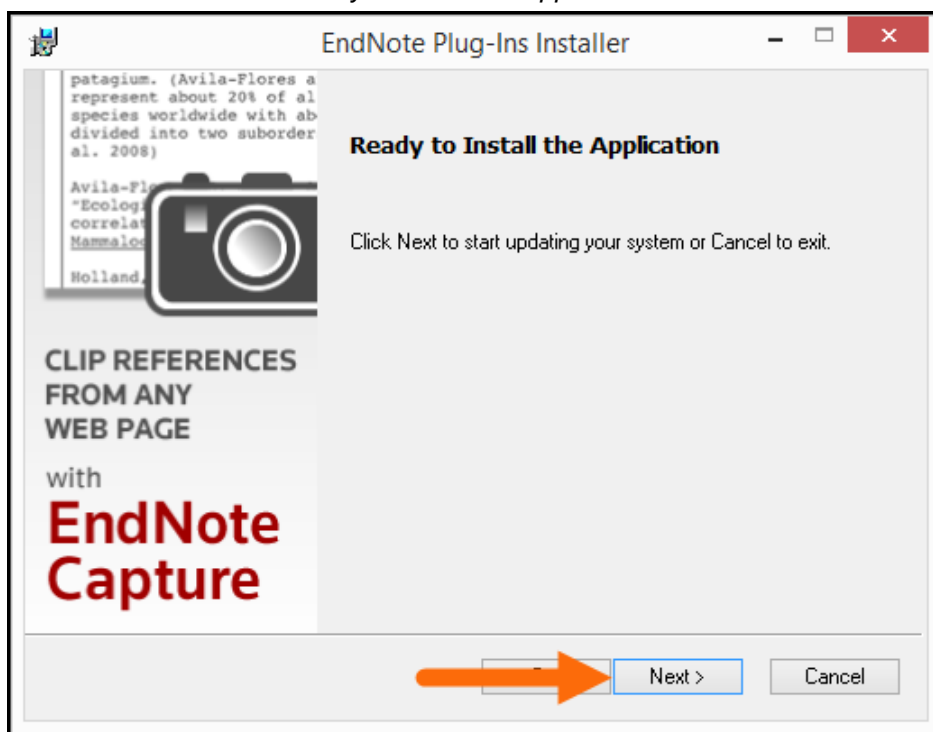
- You may change the destination folder the program will be installed in, if you wish, then click the **Next** button.



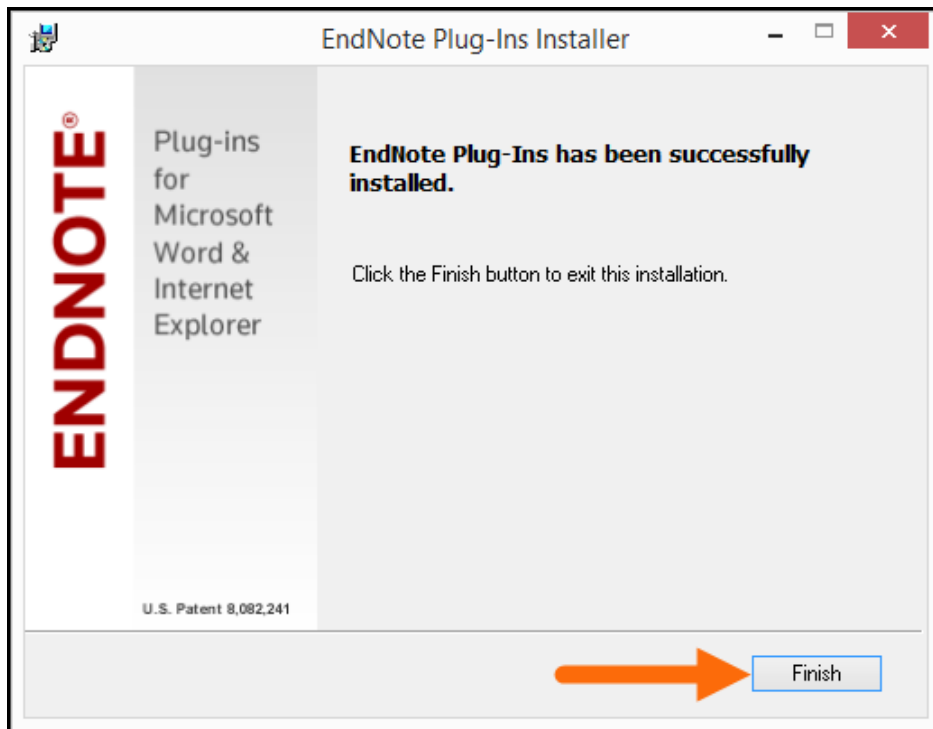
- Because you are using EndNote on both the desktop and online, you do not need the EndNote online Cite While You Write files. They are already contained in EndNote. From the drop-down **Cite While You Write for Microsoft Word** menu, select **Entire feature will be unavailable**. Then click the **Next** button.



- Click the **Next** button on the *Ready to Install the Application* screen below.



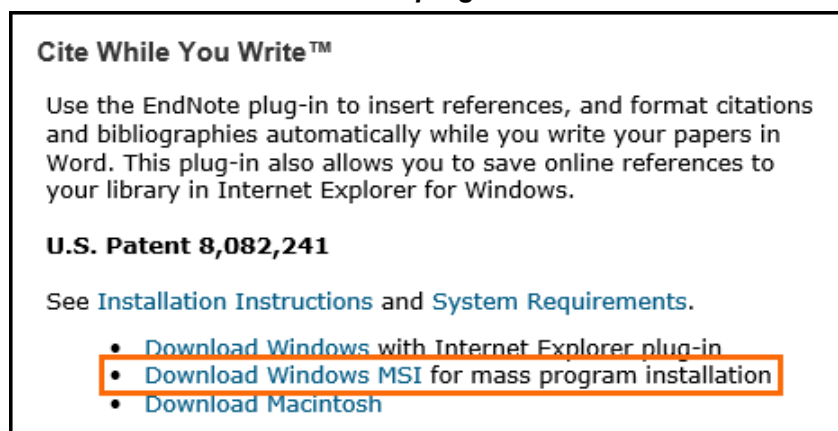
- When the installation has completed, click the **Finish** button. You can now begin using the EndNote plug-in in Internet Explorer.



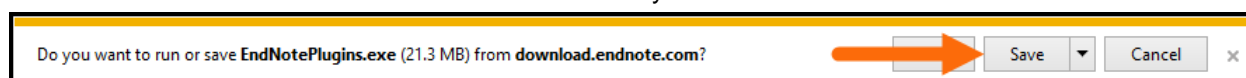
5.2.2 Installing from the Downloaded .msi File

If you need to install the plug-in on several computers, use the .msi installer.

- Select **Download Windows MSI for mass program installation.**



- Click the **Save** button and save it in a location you will remember.



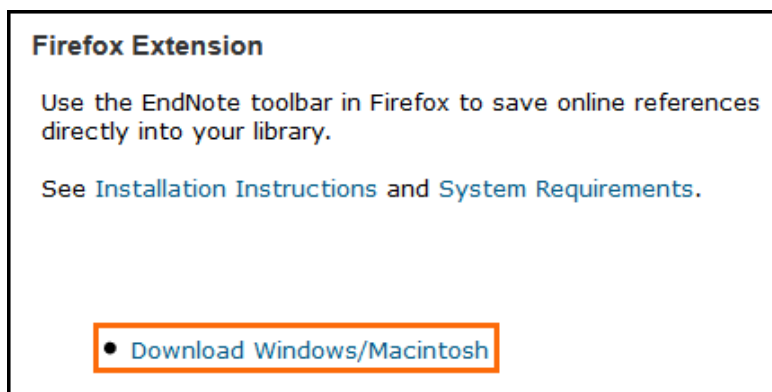
- Navigate to the location you saved the file and double-click the downloaded .msi file to begin the installation. You will see much the same buttons as above. Select the same options as above to finish the installation.

5.3 INSTALLING THE FIREFOX EXTENSION

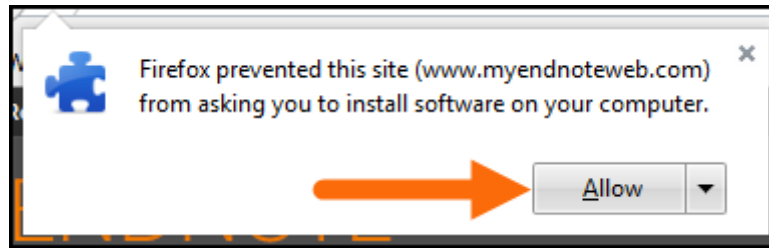
5.3.1 Windows and Macintosh

The screenshots below are from Windows, but the same commands apply to Macintosh.

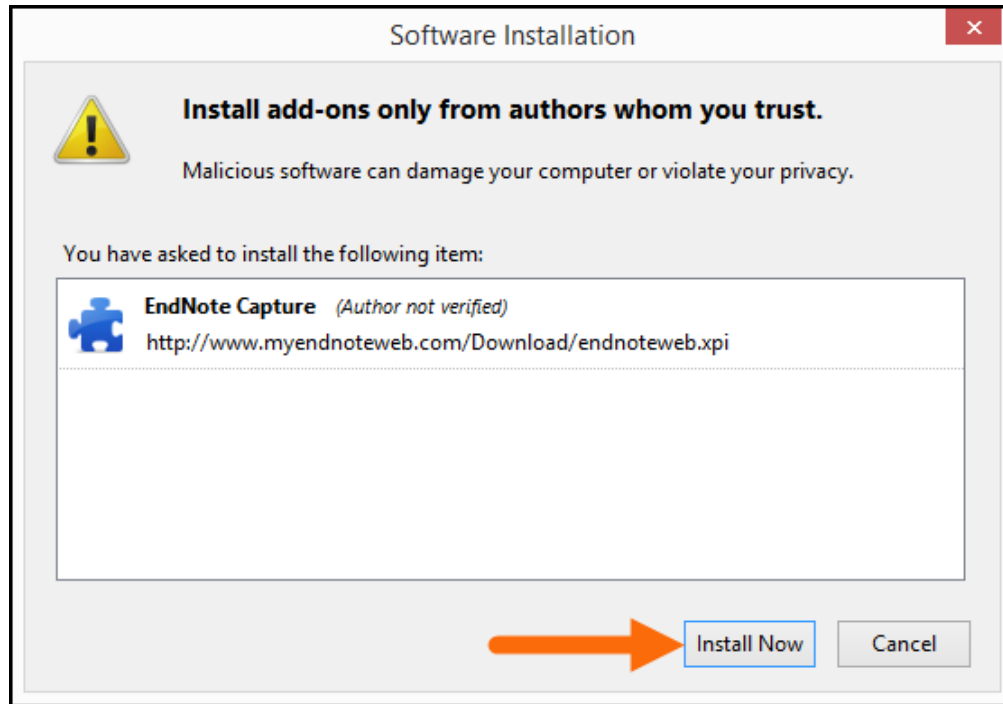
- In Firefox, on the EndNote online web site, select **Download Installers** from the **Options** tab or the bottom of any EndNote online screen.
- Select **Download Windows/Macintosh** under **Firefox Extension**.



- When you see the message asking if you want to allow the installation, click **Allow**.



- When the warning below is received, click **Install Now**.



- You will be prompted to restart Firefox to complete the installation.
- After you have installed the EndNote online extension for Firefox, you will need to set the extension options/preferences to direct search results to EndNote desktop or online. You can find instructions for setting these in section 2.4.2 for Windows and section 2.4.3 for Macintosh.

5.4 USING DIRECT EXPORT ONLINE

Using direct export online works just as it does on the desktop, except that you are directing the references to your online library. So the steps shown in this booklet in the sections *Direct Export from Thomson Reuters Web of Science* or *Direct Export from PubMed* apply here, as well.

5.5 CAPTURING MULTIPLE REFERENCES

Capture is not the same thing as direct export, and can work differently for different web sites and databases. For some sites it may only allow you to capture a single record, while for other sites a set of records. Below are examples of differences you might see with different browsers and different databases for multiple records. You may find that it is better to use Internet Explorer or Firefox with the full plug-in for

some databases, such as Google Scholar. The results shown below could also change by the time you read this, as we are constantly working on improving this feature.

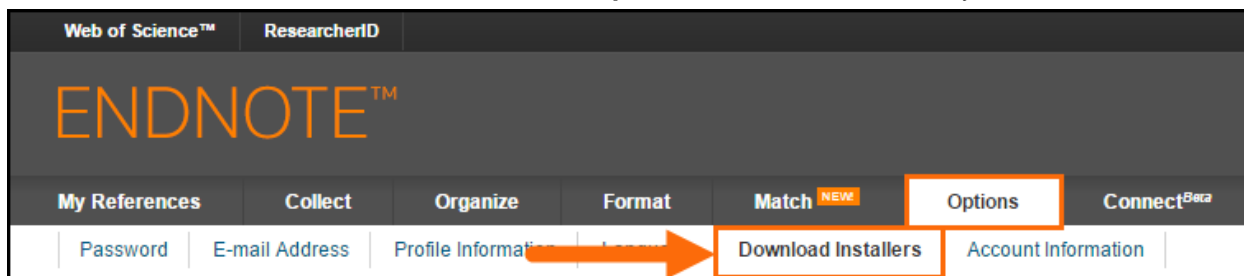
Please remember that the examples given below are only a few of the online sources Capture can be used with.

5.5.1 Installing the Capture Bookmarklet

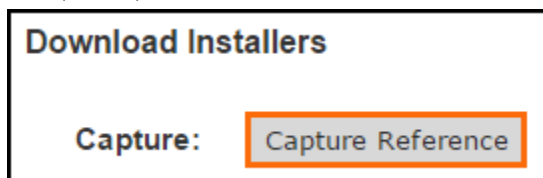
5.5.1.1 Google Chrome and Safari

The steps to install the Capture bookmarklet are the same for Google Chrome on both Windows and Macintosh, as well as Safari on Macintosh.

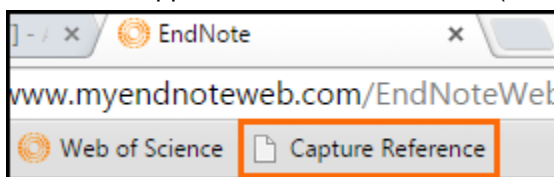
- Click the **Download Installers** link on the **Options** tab or the bottom of any EndNote online screen.



- Locate the **Capture Reference** bookmarklet on the screen and drag it to the bookmarks bar (Chrome) or favorites bar (Safari).



- A *Capture Reference* button will appear on the bookmarks bar (Chrome) or favorites bar (Safari).



5.5.1.2 Safari on iPad

If you are synchronizing bookmarks between your Mac desktop and iPad and you have installed the Capture bookmarklet on your desktop computer, you should see a *Capture Reference* button appear on the favorites bar in Safari on the iPad. In general, it will work as it does on the desktop, but we have seen problems using it with sites that require scrolling.

5.5.2 Capture a Page of References from Google Scholar

- Begin by logging into your EndNote online account, then go to the Google Scholar site.

- In the Google Scholar settings, set the **Bibliography manager** to **Show links to import citations into EndNote**, as shown below, then click the **Save** button. This will be necessary for any browser.

Bibliography manager

☐ Don't show any citation import links
☒ Show links to import citations into **EndNote**

Save **Cancel**

To retain settings, you must turn on [cookies](#)

- Perform your search in Google Scholar, then click the **Capture** button on the EndNote toolbar for Internet Explorer or Firefox, or the **Capture Reference** bookmarklet button in other browsers. Below are examples of the results you should see.

5.5.2.1 Results for Capture in Internet Explorer or Firefox

- When the capture is finished you should see a message that the references have been imported into your *Unfiled* group. You can continue capturing references one page at a time.

5.5.2.2 Results for Capture References Bookmarklet in Google Chrome

- The bookmarklet in Chrome will not be able to import the page of references. We suggest using Internet Explorer or Firefox for Google Scholar.

5.5.3 Capture a Set of References from PubMed

- Perform your search in PubMed, then click the **Capture** button on the EndNote toolbar for Internet Explorer or Firefox, or the **Capture Reference** bookmarklet button in other browsers. Below are the results you should see.

5.5.3.1 Results for Capture Button in Internet Explorer or Firefox

- When the capture is finished you should see a message that multiple references have been imported into your *Unfiled* group. You can continue capturing references one page at a time. (Please note that in these browsers you could also use direct export to export up to 200 references at a time to either your online or desktop library.)

5.5.3.2 Results for Capture Bookmarklet in Google Chrome on Windows

- When you see the screen below, select **my.endnote.com** to import the page of references to your EndNote online library or **EndNote** to import the references to your EndNote desktop library, then click the **Capture** button.

Go to EndNote [Close\[x\]](#)

Capture New References

To: ☒ my.endnote.com ☐ EndNote

Groups:

- ☐ AI: Corvids
- ☐ AI: Parrots
- ☐ Bat: Chiroptera
- ☐ Bat: Echolocation
- ☐ Choc: Dark Chocolate
- ☐ New Group

[Capture](#)

View in | [简体中文](#) | [繁體中文](#) | [English](#) | [Deutsch](#) | [日本語](#) | [한국어](#) | [Português](#) | [Español](#)

- If you selected **my.endnote.com**, you can also select the group to add the reference to or you can create a new group for the references.
- If you selected **EndNote**, Chrome will download the references as shown below.

Go to EndNote [Close\[x\]](#)

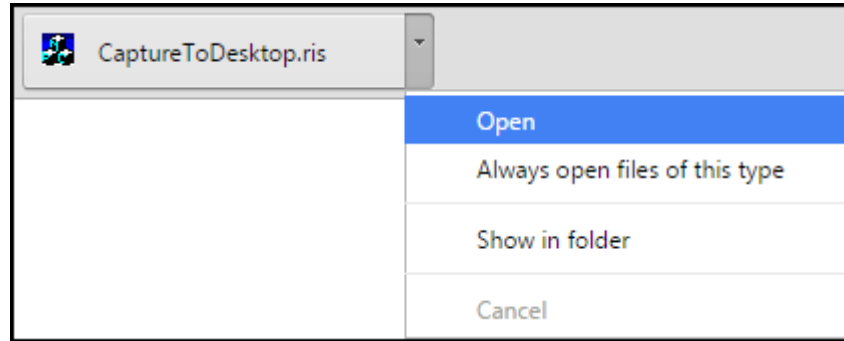
20 references were captured successfully.

Please wait while your request is processed.

[Download](#) If the "Download" process does not start automatically, click "Download"

View in | [简体中文](#) | [繁體中文](#) | [English](#) | [Deutsch](#) | [日本語](#) | [한국어](#) | [Português](#) | [Español](#)

- When you see the screen above, look in the status bar at the bottom of the screen, where you can select the option to **Open** the file.



- At this point you can follow the direct export instructions found in section **2.3.4**.

5.6 CAPTURING A SINGLE REFERENCE

- The Capture button can also be used to capture information from web sites such as YouTube, Amazon.com, online newspapers, etc. When looking at a newspaper article, video in YouTube, book information in Amazon.com, or similar web sites, click the **Capture** button to capture the information on the site. You will see an editable record such as the one below, showing the data EndNote was able to capture.

Go to EndNote Close[x]

Capture New Reference

Save To ☐ my.endnote.com ☒ EndNote

[Bibliographic Fields](#) | [Optional Fields](#)

Groups: [Add or remove](#)

Bibliographic Fields: At least one of the fields must be filled out.

Reference Type:

Author:
Use format Last Name, First name. Enter each name on a new line.

Title:

Year:

Journal:

Groups:

- ☐ AI: Corvids
- ☐ AI: Parrots
- ☐ Bat: Chiroptera
- ☐ Bat: Echolocation
- ☐ Choc: Dark Chocolate
- ☐ New Group

[Back to top](#)

Save To ☐ my.endnote.com ☒ EndNote

View in | [简体中文](#) | [繁体中文](#) | [English](#) | [Deutsch](#) | [日本語](#) | [한국어](#) | [Português](#) | [Español](#)

- Select the option to save it to **my.endnote.com** to save it to your online library, with the option to save it to an existing group or create a new group, or select **EndNote** to save it to your desktop library.

Capture New Reference

Save To ☐ my.endnote.com ☒ EndNote

[Bibliographic Fields | Optional Fields](#)

Groups: [Add or remove](#)

Bibliographic Fields: At least one of the fields must be filled out.

Reference Type: Journal Article ▼

Author:

Title:

Year:

Journal:

Publisher:

Volume:

Issue:

Pages:

Start Page:

Epub Date:

- Edit the reference to add missing information or change the reference type, then click the **Save to** button to save the record.

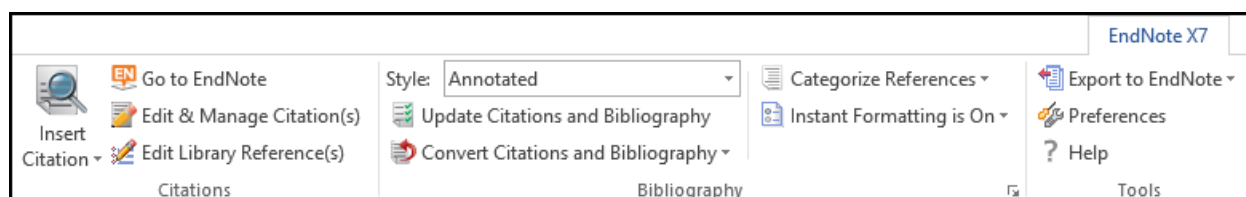
6 CITE WHILE YOU WRITE

EndNote's Cite While You Write (CWYW) lets you look up references, insert them in your document, format your bibliography, and edit your citations to include page numbers or other text, all from within your word-processing document. Below are instructions for using Cite While You Write with Microsoft Word.

6.1 CITE WHILE YOU WRITE IN MICROSOFT WORD ON WINDOWS

6.1.1 Installing the Cite While You Write Tools

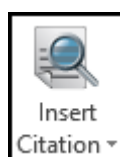
When you install EndNote it will automatically install files into a common program folder, allowing EndNote and Word to communicate and enabling Cite While You Write (CWYW). In Word 2007, 2010, or 2013 you will see a tab on the ribbon, similar to that shown below. (Note: It is best to close all other programs before installing EndNote, most especially Word and Outlook. When installing Word and EndNote on a new computer, always install Word first to enable EndNote to find it and be able to install the Cite While You Write tools.)



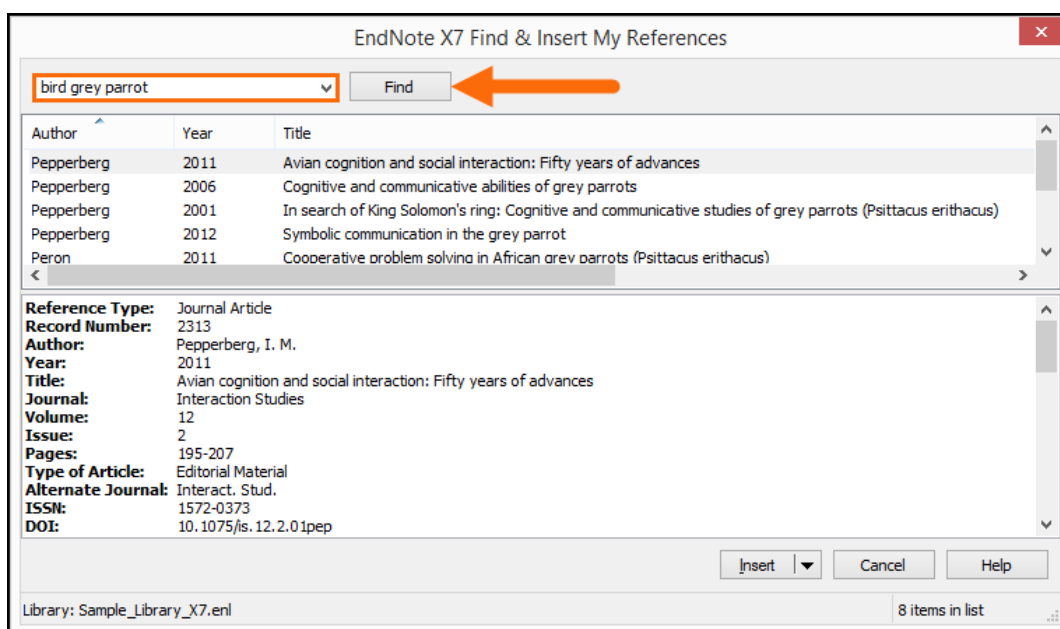
Below is information on using the Cite While You Write tools that you will need on a day-to-day basis.

6.1.2 Adding Citations to a Document Using Insert Citation

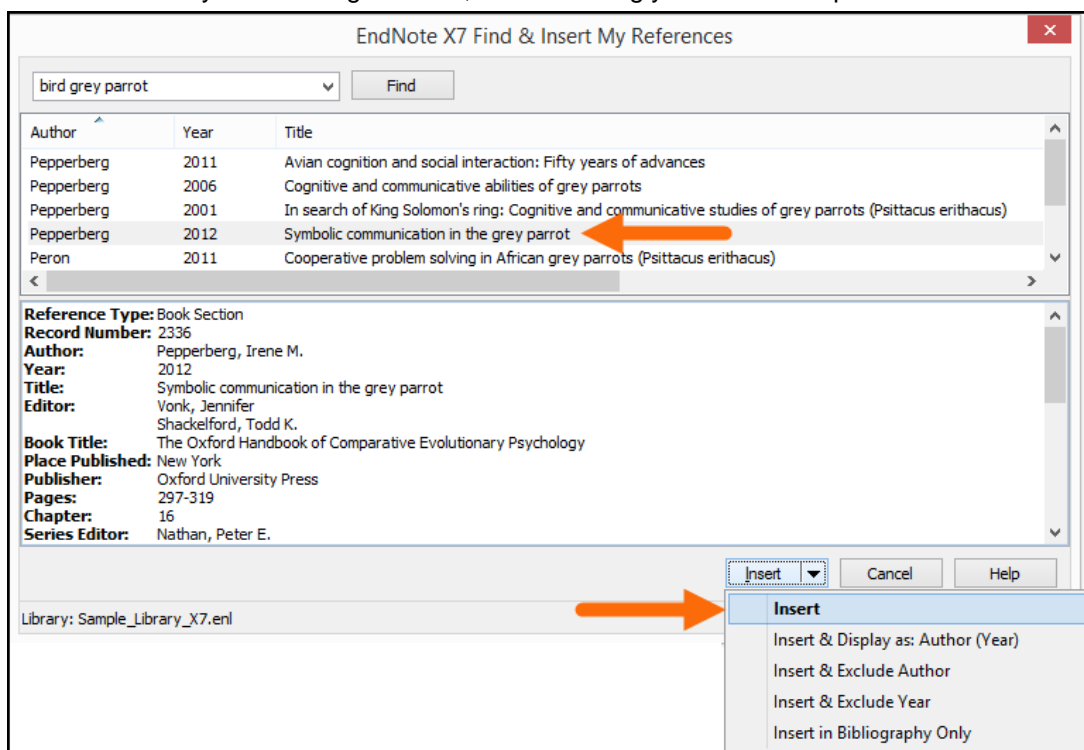
- Click the magnifying glass in the top half of the **Insert Citation** button on the EndNote tab in Word to open the **Find & Insert My References** window.



- In the **Find & Insert My References** window that appears, enter your search terms and click the **Find** button, or press the **Enter/Return** key, to bring up a set of references that contain those search terms. The terms can be anywhere in the EndNote record, but all the terms must be present in the same record.



- Next, select (highlight) the reference(s) you want to insert. When you select a single reference, you will see the details for that reference in the bottom part of the window, but details can be shown for only a single reference. However, you can select multiple references for insertion by holding down the **Control** key and clicking on them, then selecting your insertion options from the **Insert** list.



- Your references will be inserted in the document and instantly formatted.

6.1.3 Adding Citations to a Document Using Insert Selected Citations

- To select the citations you will insert in the document, return to EndNote by clicking the **Go to EndNote** button.



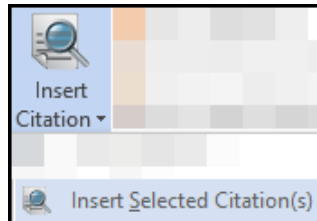
- In EndNote, select (highlight) the references you want to insert. You have two choices for how you insert them in the document.
 - You can insert them in the document from EndNote using the first button of the set shown below, **Insert Citation**. (Note this is a different command than the **Insert Citation** button within Word, being the equivalent of the **Insert Selected Citation(s)** command in Word.) This will insert the references wherever your cursor is located in Word.



- If you would like to check if your cursor is in the correct location and then insert the references from within Word, in EndNote click on the third button shown in the set below, **Return to Word Processor**.



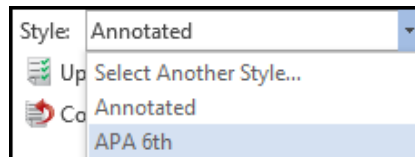
- If you returned to Word to insert the selected citations, click the bottom part of the **Insert Citation** button, then select **Insert Selected Citation(s)** from the drop-down list.



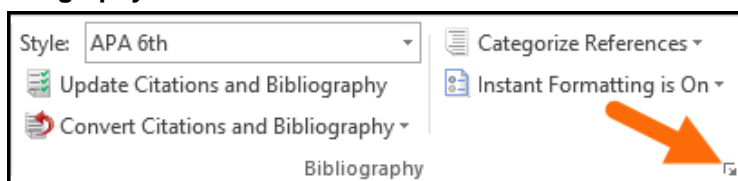
- Your references will be inserted in the document and instantly formatted.

6.1.4 Selecting the EndNote Style for Your Citations and Bibliography

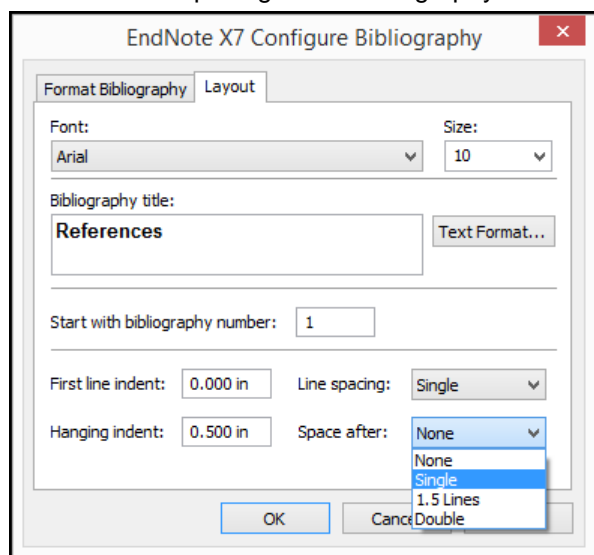
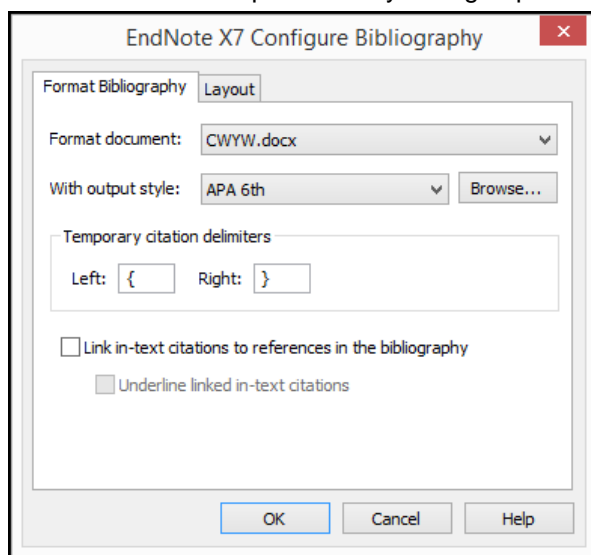
- You can select your preferred style from the drop-down style list as shown below, or select the **Select Another Style** option to see the list of EndNote styles available on your computer. (Note that a typical installation of EndNote only installs a list of popular styles. You can perform a custom installation of EndNote to install more styles or download them from the EndNote web site.)



- If you would like more control over the formatting of the citations and bibliography, such as the ability to change the line spacing or set hyperlinking options between the citations and bibliography, click the **small arrow in the bottom right corner of the Bibliography group** to open the **Configure Bibliography** window.



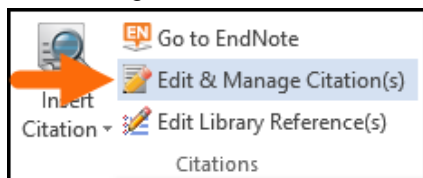
- The two tabs in the **Configure Bibliography** window provide options for changing the style, adding, removing, or formatting hyperlinks between citations and their matches in the bibliography, adding a centered title above the bibliography, changing the font used for the bibliography, and more. Select your options, then click the **OK** button to make your changes. Changing these options using Word commands would not effect permanent changes; you must use the **Configure Bibliography** command to permanently change options such as font or line spacing in the bibliography.



6.1.5 Editing Citations in the Document

If you try to edit citations in a document by simply typing the page numbers into a citation or removing an author's name from a citation, the change will only be temporary and will disappear with the next update of the bibliography. Worse than that, you risk corrupting the citation codes, which would prevent EndNote from updating them and could cause other problems in your document. The only safe way to make changes to the citations is using the **Edit & Manage Citations** command.

- Click on the citation you want to change, then click the **Edit & Manage Citations** button.



- In the **Edit & Manage Citations** window there are two tabs in the lower part of the window. The first tab, **Edit Citation** (shown below), contains fields where you can add prefix or suffix text to a citation, as well as page numbers for those styles that require them. There is also a drop-down **Formatting** list that provides options to put the author's name outside of the parentheses, exclude an author's name, exclude the year, or show the reference only in the bibliography. (Note: If you are using a style where page numbers entered in the Pages field do not show, enter page numbers in the Suffix field, which will always show.)

The screenshot shows the 'EndNote X7 Edit & Manage Citations' window with the 'Edit Citation' tab selected. The window has a table at the top listing citations with columns for Citation, Count, and Library. Below the table, there are fields for Prefix, Suffix, and Pages. A 'Formatting' dropdown menu is set to 'Default'. At the bottom, there are 'OK', 'Cancel', and 'Help' buttons, and a status bar showing 'Totals: 2 Citation Groups, 5 Citations, 5 References'.

| Citation | Count | Library |
|--|-------|-------------------|
| (Laudato, 2010; Pepperberg, 1999) | | |
| Laudato, 2010 #2334 | 1 | Sample_Library_X7 |
| Pepperberg, 1999 #2298 | 1 | Sample_Library_X7 |
| (Bird & Emery, 2009; Holzhaider et al., 2011; von Bayern, Heathcote, Rutz, & Kacelnik, 2009) | | |
| Bird, 2009 #2318 | 1 | Sample_Library_X7 |
| von Bayern, 2009 #2316 | 1 | Sample_Library_X7 |
| Holzhaider, 2011 #2314 | 1 | Sample_Library_X7 |

Formatting: Default

Prefix:

Suffix:

Pages:

Tools:

Totals: 2 Citation Groups, 5 Citations, 5 References

- The second tab, **Reference**, shows the details for the selected (highlighted) reference in the top half of the window.

The screenshot shows the 'EndNote X7 Edit & Manage Citations' window with the 'Reference' tab selected. The window displays the details for the selected reference, including the Reference Type, Record Number, Created By, Year, Title, Series Editor, Series Title, Distributor, and Date Accessed. At the bottom, there are 'OK', 'Cancel', and 'Help' buttons, and a status bar showing 'Totals: 2 Citation Groups, 5 Citations, 5 References'.

| Citation | Count | Library |
|--|-------|-------------------|
| (Laudato, 2010; Pepperberg, 1999) | | |
| Laudato, 2010 #2334 | 1 | Sample_Library_X7 |
| Pepperberg, 1999 #2298 | 1 | Sample_Library_X7 |
| (Bird & Emery, 2009; Holzhaider et al., 2011; von Bayern, Heathcote, Rutz, & Kacelnik, 2009) | | |
| Bird, 2009 #2318 | 1 | Sample_Library_X7 |
| Holzhaider, 2011 #2314 | 1 | Sample_Library_X7 |
| von Bayern, 2009 #2316 | 1 | Sample_Library_X7 |

Reference Type: Online Multimedia

Record Number: 2334

Created By: Laudato, Anthony

Year: 2010

Title: Bird grooves to the beat

Series Editor: Small, David

Series Title: CBS Sunday Morning

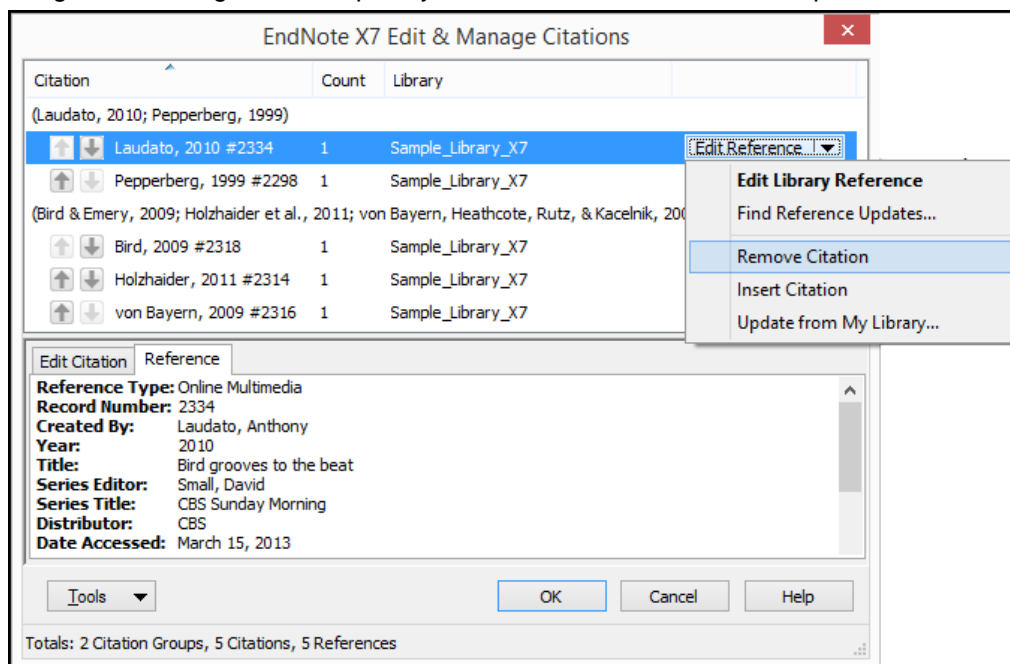
Distributor: CBS

Date Accessed: March 15, 2013

Tools:

Totals: 2 Citation Groups, 5 Citations, 5 References

- Along with being able to add text to citations, you can also use the **Edit Reference** drop-down list for each reference to add new citations to the grouped citation with the **Insert Citation** command, or safely remove citations from a grouped citation with the **Remove Citations** command. This is the safest way to remove citations from a document because it safely removes all of the hidden coding. If the coding is not completely removed, it can result in a corrupted citation.



6.2 CITE WHILE YOU WRITE IN MICROSOFT WORD ON MACINTOSH

6.2.1 Installing the Cite While You Write Tools

When you install EndNote it will automatically install files allowing EndNote and Word to communicate and enabling Cite While You Write (CWYW). In Word 2008 or 2011 you will see an **EndNote** menu under the Word **Tools** menu and an EndNote toolbar like the one below. (Note: It is best to close all other programs before installing EndNote, most especially Word and Outlook. When installing Word and EndNote on a new computer, always install Word first to enable EndNote to find it and be able to install the Cite While You Write tools. Also note that Word 2011's Visual Basic **must** be installed to use Cite While You Write.)



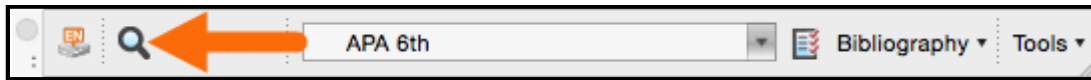
If you installed Word after installing EndNote, you can run the Customizer to install the Cite While You Write tools by selecting **Customizer** from the **EndNote** menu.

Please note that floating toolbars in Word can be closed and reopened. If you have closed the toolbar and want to see it again, select **View→Toolbars** in Word, then select the **EndNote** toolbar.

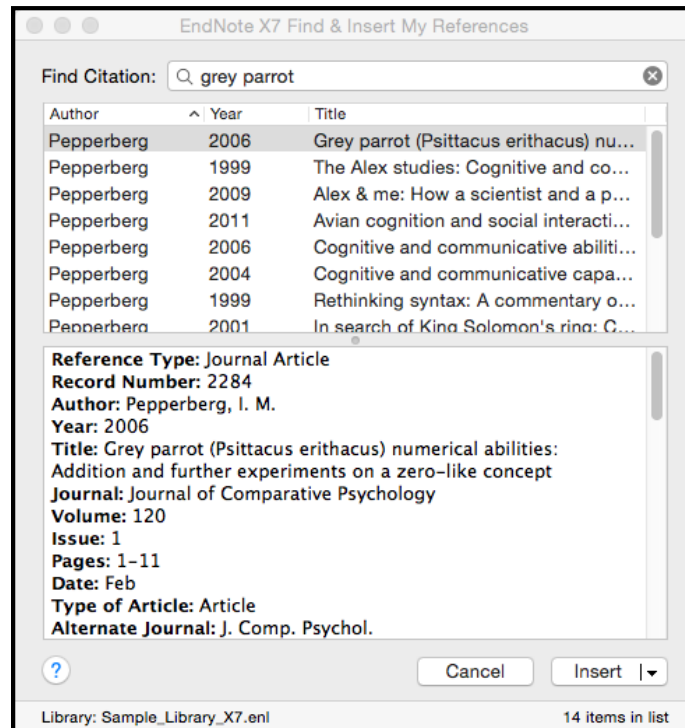
Below is information on using the Cite While You Write tools that you will need on a day-to-day basis.

6.2.2 Adding Citations to a Document Using Insert Citation

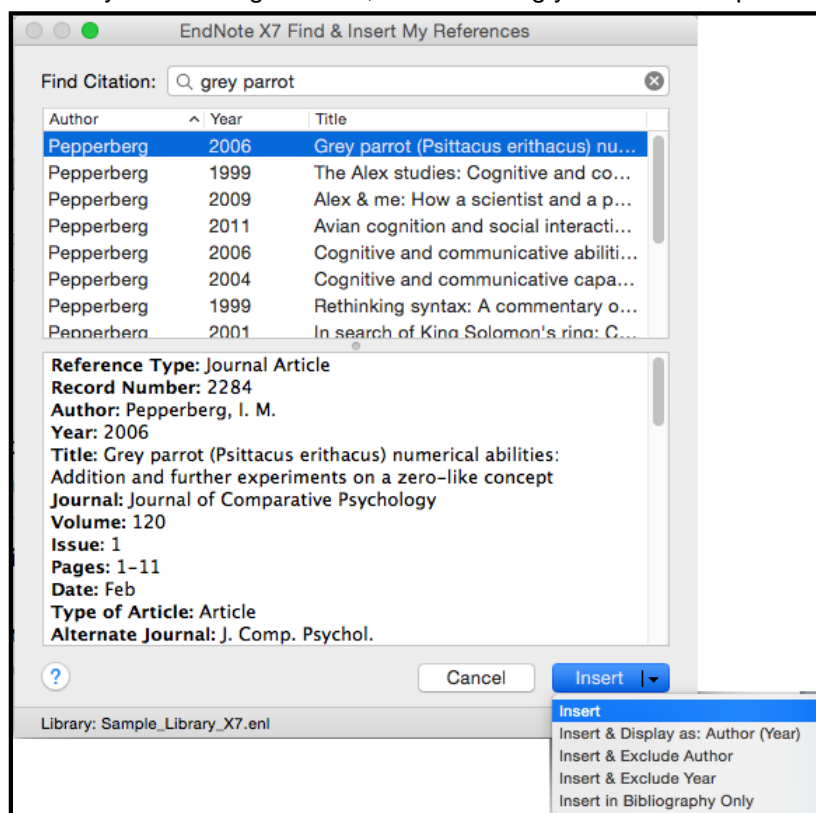
- Click the **Find & Insert My References** button (the magnifying glass button) on the EndNote toolbar in Word to open the *Find & Insert My References* window.



- In the **Find & Insert My References** window that appears, enter your search terms and press the **Enter/Return** key on your keyboard to bring up a set of references that contain those search terms. The terms can be anywhere in the EndNote record, but all the terms must be present in the same record.



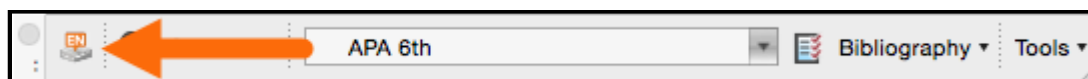
- Next, select (highlight) the reference(s) you want to insert. When you select a single reference, you will see the details for that reference in the bottom part of the window, but details can be shown for only a single reference. However, you can select multiple references for insertion by holding down the **Command** key and clicking on them, then selecting your insertion options from the **Insert** list.



- Your references will be inserted in the document and instantly formatted.

6.2.3 Adding Citations to a Document Using Insert Selected Citations

- To select the citations you will insert in the document, return to EndNote by clicking the **Go to EndNote** button.



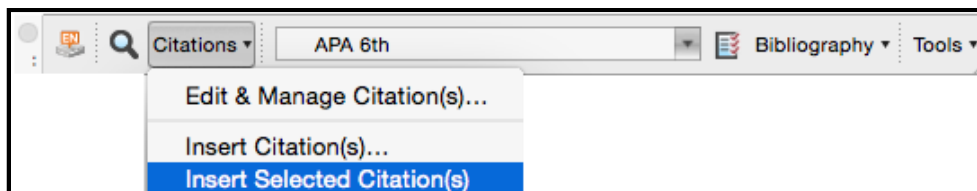
- In EndNote, select (highlight) the references you want to insert. You have two choices for how you insert them in the document.
 - You can insert them in the document from EndNote using the first button of the set shown below, **Insert Citation**. This will insert the references wherever your cursor is located in Word.



- If you would like to check if your cursor is in the correct location and then insert the references from within Word, in EndNote click on the third button shown in the set below, **Return to Word Processor**.



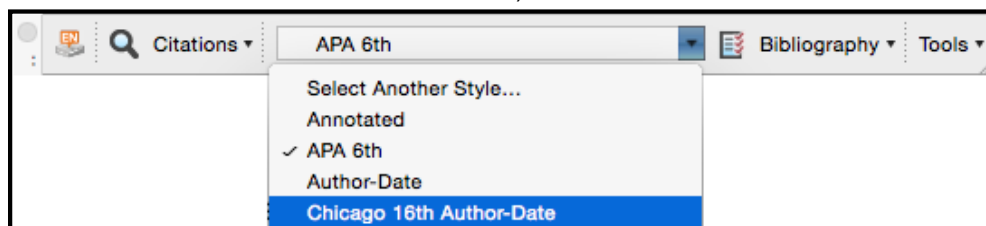
- If you returned to Word to insert the selected citations, click the **Citations** button, then select **Insert Selected Citation(s)** from the drop-down list.



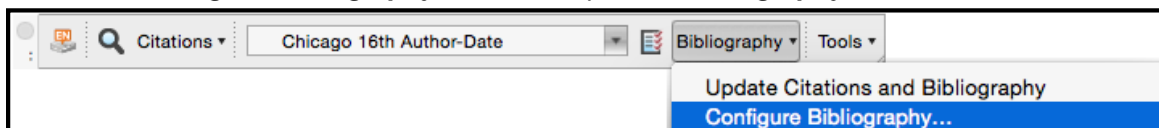
- Your references will be inserted in the document and instantly formatted.

6.2.4 Selecting the EndNote Style for Your Citations and Bibliography

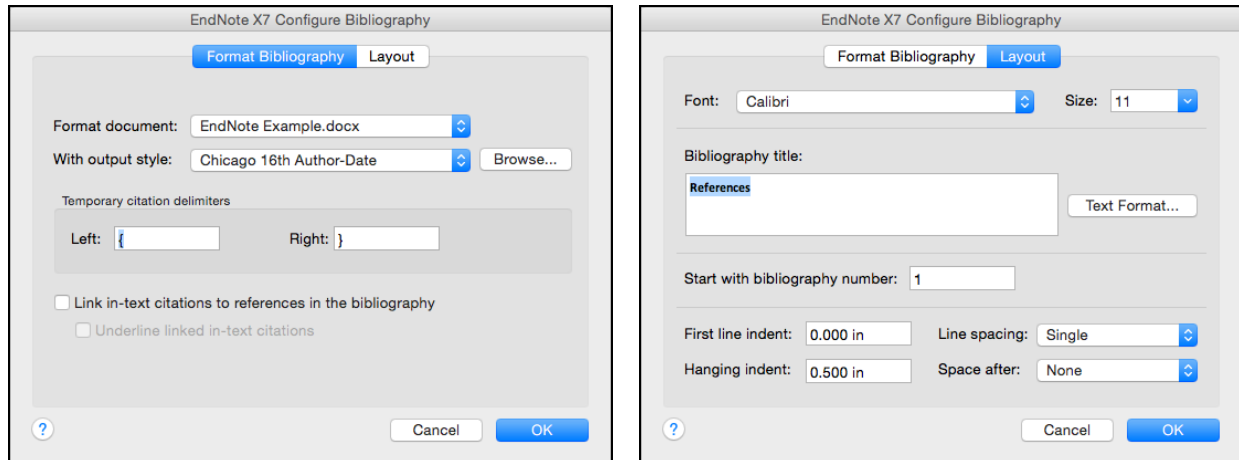
- To select the style for your citations and bibliography, select your preferred style from the drop-down style list as shown below, or select the **Select Another Style** option to see the list of EndNote styles available on your computer. (Note that a typical installation of EndNote only installs a list of popular styles. After installation, select **Customizer** from the **EndNote** menu to install more styles or download them from the EndNote web site.)



- If you would like more control over the formatting of the citations and bibliography, such as the ability to change the line spacing or set hyperlinking options between the citations and bibliography, select **Configure Bibliography** from the drop-down **Bibliography** list.



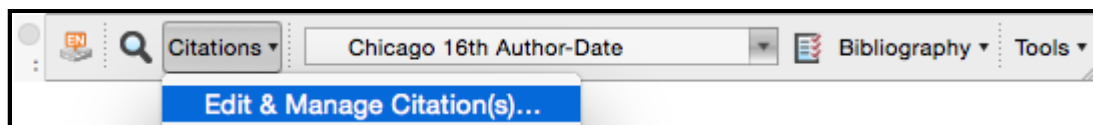
- The two tabs in the **Configure Bibliography** window provide options for changing the style, adding, removing, or formatting hyperlinks between citations and their matches in the bibliography, adding a centered title above the bibliography, changing the font used for the bibliography, and more. Select your options, then click the **OK** button to make your changes. Changing these options using Word commands would not effect permanent changes; you must use the **Configure Bibliography** command to permanently change options such as font or line spacing in the bibliography. (Note: Because simply clicking on a hyperlink in a Word for Macintosh document will activate the link, it is best not to turn on hyperlinking between citations and bibliography until you are finished working with the document.)



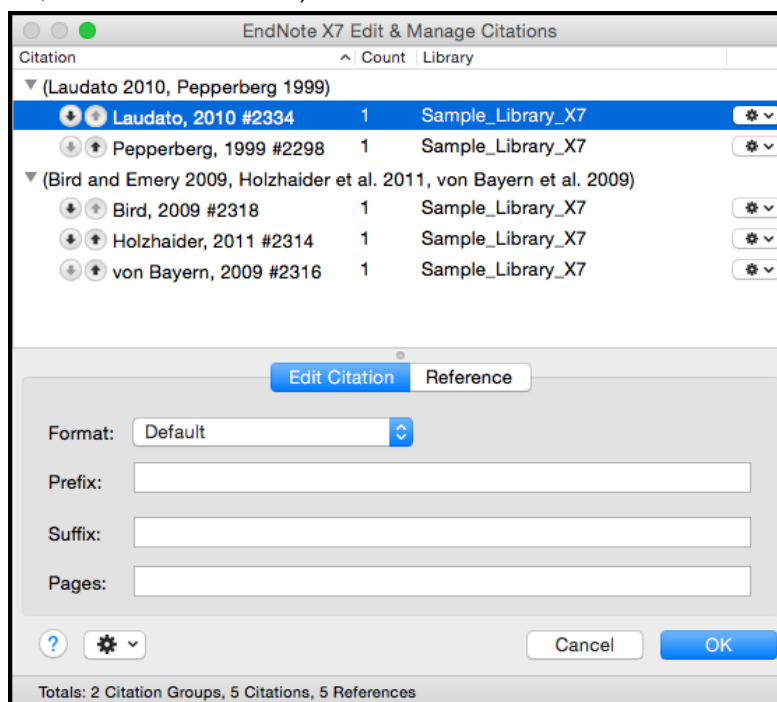
6.2.5 Editing Citations in the Document

If you try to edit citations in a document by simply typing the page numbers into a citation or removing an author's name from a citation, the change will only be temporary and will disappear with the next update of the bibliography. Worse than that, you risk corrupting the citation codes, which would prevent EndNote from updating them and could cause other problems in your document. The only safe way to make changes to the citations is using the **Edit & Manage Citations** command.

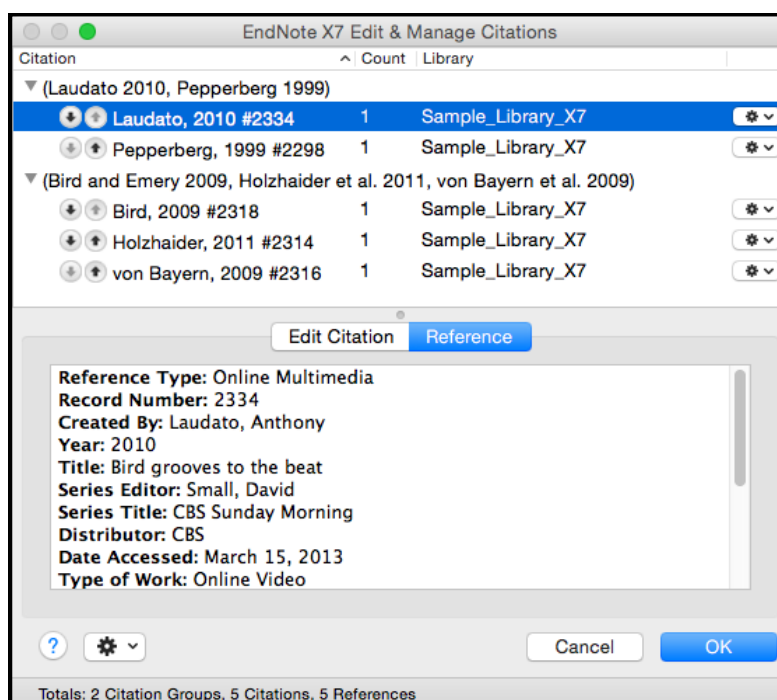
- Click on the citation you want to change, then click the **Citations** button and select **Edit & Manage Citations**.



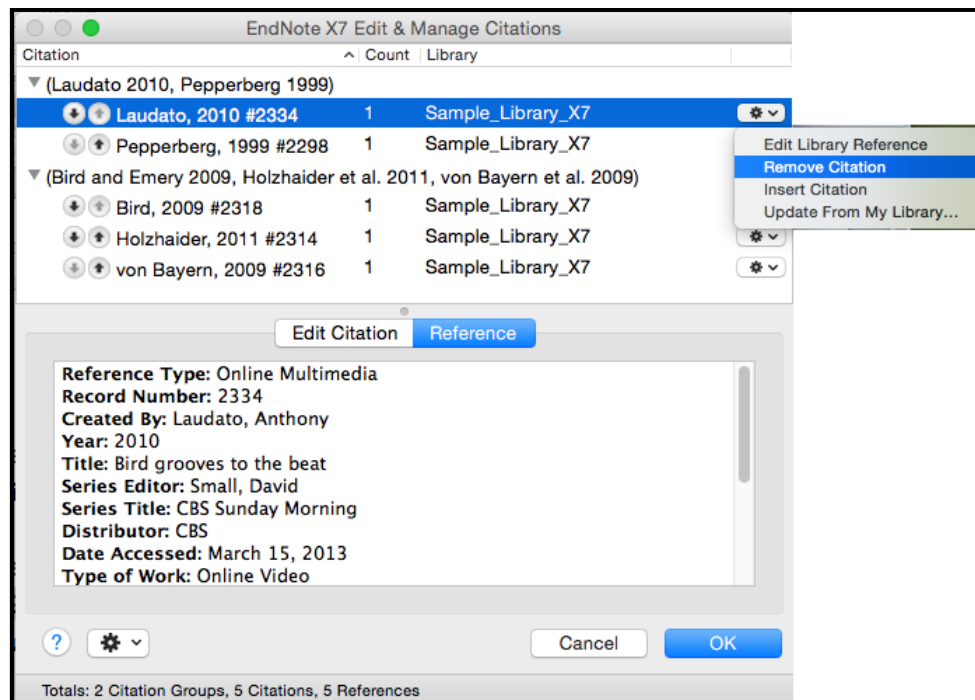
- In the **Edit & Manage Citations** window there are two tabs in the lower part of the window. The first tab, **Edit Citation** (shown below), contains fields where you can add prefix or suffix text to a citation, as well as page numbers for those styles that require them. There is also a drop-down **Format** list that provides options to put the author's name outside of the parentheses, exclude an author's name, exclude the year, or show the reference only in the bibliography. (Note: If you are using a style where page numbers entered in the Pages field do not show, enter page numbers in the Suffix field, which will also show.)



- The second tab, **Reference**, shows the details for the selected (highlighted) reference in the top half of the window.



- Along with being able to add text to citations, you can also use the drop-down list at the right of each reference to add new citations to a grouped citation with the **Insert Citation** command, or safely remove citations from a grouped citation with the **Remove Citations** command. This is the safest way to remove citations from a document because it safely removes all of the hidden coding. If the coding is not completely removed, it can result in a corrupted citation.



7 COLLABORATION: SHARING ENDNOTE REFERENCES

An EndNote library is not a single file. It is a set of files, many of them frequently updated as you work, and these files must be updated in a strict sequence by EndNote to avoid corruption of the library. This can cause difficulties when sharing libraries because only EndNote can properly control the sequence for updating and saving of data in the library, and outside synchronization or file management services can actually damage EndNote libraries. This section covers some of the methods to avoid, and then talks about safer methods of sharing references or complete libraries.

7.1 HOW NOT TO SHARE AN ENDNOTE LIBRARY

7.1.1 EndNote Libraries on “Cloud” Services

Never store an EndNote working library on any cloud service for sharing, or even just for your own use on multiple computers. This will eventually lead to library corruption because of the way the cloud services synchronize files over the Internet. Such unusable cloud services would include, but are not limited to—

- Amazon Cloud
- Box
- Dropbox
- Google Drive
- SharePoint
- OneDrive
- SugarSync

Also, never store a working library on a flash drive.

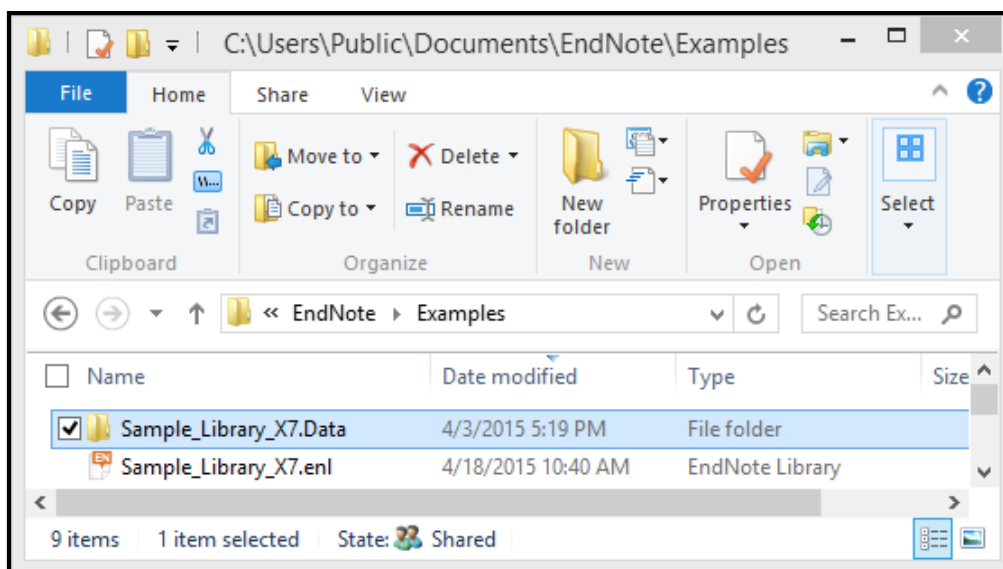
The reason these methods are inadvisable is that when you are working in EndNote, it is saving data to multiple files, and the data must be saved in a set sequence, as described above. When cloud services transfer that data, they may change the sequence of file saves. This eventually leads to library corruption. The library may appear to be fine for days, weeks, or even months, but will eventually be corrupted.

7.1.2 EndNote Libraries on Network Servers

EndNote libraries with read-write access should not be stored on network drives. We have seen corruption problems with libraries on network drives as well as general performance issues. Ideally, the library should be kept on the owner's computer. If you must keep a library with read-write access on a network drive, we suggest you make frequent backups of the library using the **File→Compressed Library** command for libraries smaller than 5G or the **File→Save A Copy** command for larger libraries.

7.1.3 Sending the .enl File for a Library When Sharing a Library

Every EndNote library is made up of two parts: the .enl file and the .data folder, as seen below.



It may be helpful to think of the .enl file as just the interface file for working with the contents of the .data folder, where all the real data is kept. When you open a .enl file, EndNote searches for the matching .data folder and refreshes the screen with the latest information in a sort of “snapshot.” If the .data folder is removed, EndNote will create a new one with data to match the last “snapshot” because it must have a .data folder to work. However, that new .data folder would not contain any of the attachments, group structure, or term lists from the original library; it would contain only the reference data. If you send somebody the .enl file only, they will receive only a portion of the library.

So how can you share EndNote references safely?

7.2 SHARING FULL ENDNOTE LIBRARIES

The EndNote X7.2 update introduced two much-requested features to EndNote:

1. Unlimited attachment space in EndNote online.
2. Full library sharing for up to fifteen people, including the library owner.

7.2.1 Unlimited Attachment Space in EndNote Online

In the past, EndNote X6/X7 users were limited to 5 gigabytes of attachment space in EndNote online. For EndNote X7 users, that limit has now been removed. As in EndNote on the desktop, an unlimited number of files of any type can be synchronized to and stored in EndNote online — PDFs, Word documents, PowerPoint presentations, even audio or video files — and through EndNote online those attachments can sync with up to three computers per user (for a single-user license of EndNote, site licenses may have restrictions on outside installations of the software).

Please note that EndNote basic users will still be limited to 2 gigabytes of attachment space.

7.2.2 Full Library Sharing

7.2.2.1 The Basics

In the past, there was no way for users to share simultaneous access to a complete EndNote library with full read-write permissions and attachments. Full libraries could be shared on a network server with read-only access for simultaneous use, but only the owner could make changes, or groups could be shared

through EndNote online, but without attachment sharing. Plus, to share a group online required the sharer to know the email address for the “sharee’s”¹ EndNote online account. Users of EndNote X7.2 or later can share their entire library, with simultaneous read-write access to all references and attachments, with up to fourteen other EndNote X7.2 (or later) users. The basic requirements and information for sharing are—

- All users must be using EndNote X7.2 or later.
- All users must sync their EndNote desktop and online libraries. The sharing process works through EndNote Sync.
- A library owner can sync only one EndNote library, so only one library can be shared with others or synced to the owner’s other computers or iPad. We suggest users have one library for all their writing and sync that library.
- Although a library owner can only share with up to fourteen other EndNote users, an unlimited number of libraries can be shared with a sharee. For example, if an administrative assistant worked with 30 faculty members, all 30 faculty members would be able to share their full libraries with the administrative assistant.
- Because the entire library is synced to all recipients, with attachments, the library will take up as much space on the recipient’s computer as it does on the owner’s computer and can be used off-line. However, the library can only be accessed through the **File→Open Shared Library** command in EndNote.
- The sharee will have full access to the library, this means they can add, change, or delete references and attachments. We suggest the owner make frequent backups of their library using the **File→Compressed Library** command.


7.2.2.2 How to Share a Library


- If you have not already synced your EndNote desktop and online libraries, click the **Sync** button to sync for the first time. (Note that you may be asked if you want to create a compressed library as a backup if it is the first time the library has been synced on that computer. We strongly suggest making a backup before the first sync. See section 5.1 for more details on syncing an EndNote library for the first time.)

Sync button for Windows: 

Sync button for Macintosh: 

- In your synced library, click the **Share Library** button.

Share Library button for Windows: 

Share Library button for Macintosh: 

¹ The word “sharee” will be used throughout this section to designate the person a library is shared with.

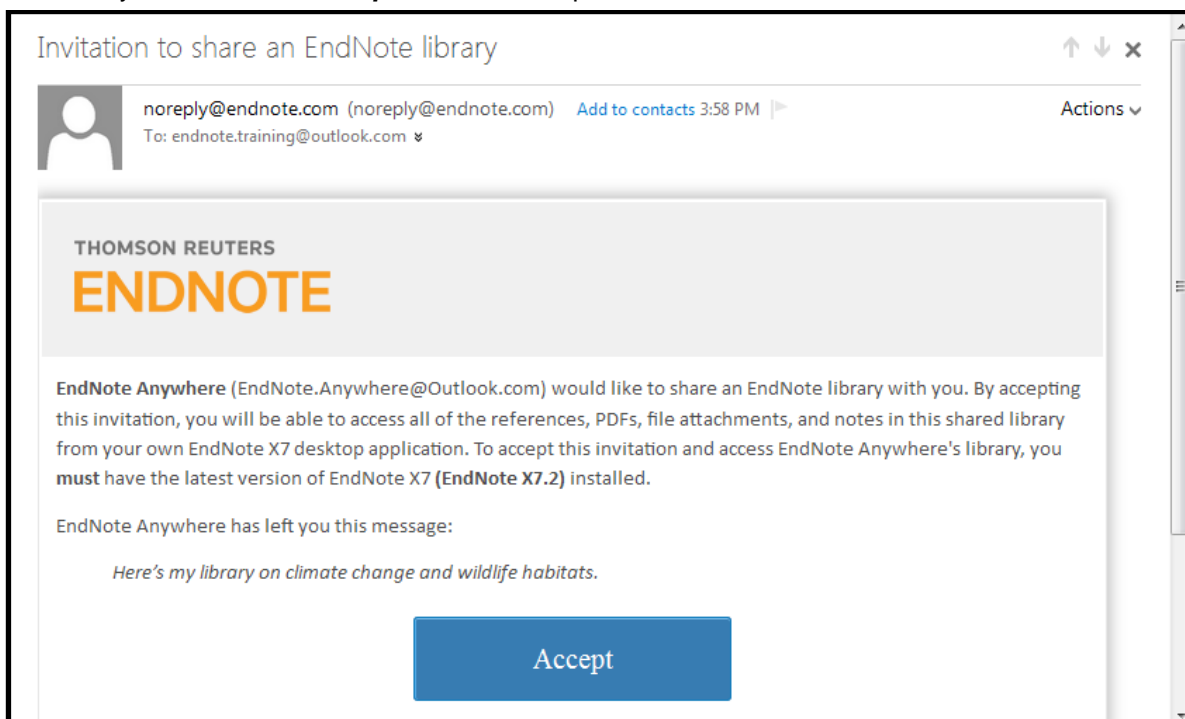
- Enter the email address of the person you want to invite to the shared library, then click the **Invite** button. The email address does not need to be the one the invitee/sharee uses for their EndNote online account. (Note: excess space has been removed from the image to better fit on page.)

This screenshot shows the 'Share with' dialog box in EndNote. At the top, it says 'You are sharing your library with 0 people out of a possible 14.' Below this is a table with two columns: 'Share with' and 'Status'. The 'Invite More People' section is active, showing a text input field for email addresses with 'endnote.training@outlook.com' entered. Below the email field is a text area for an optional message with the text 'Here's my library on climate change and wildlife habitats.' At the bottom right of the dialog are 'Invite' and 'Close' buttons.

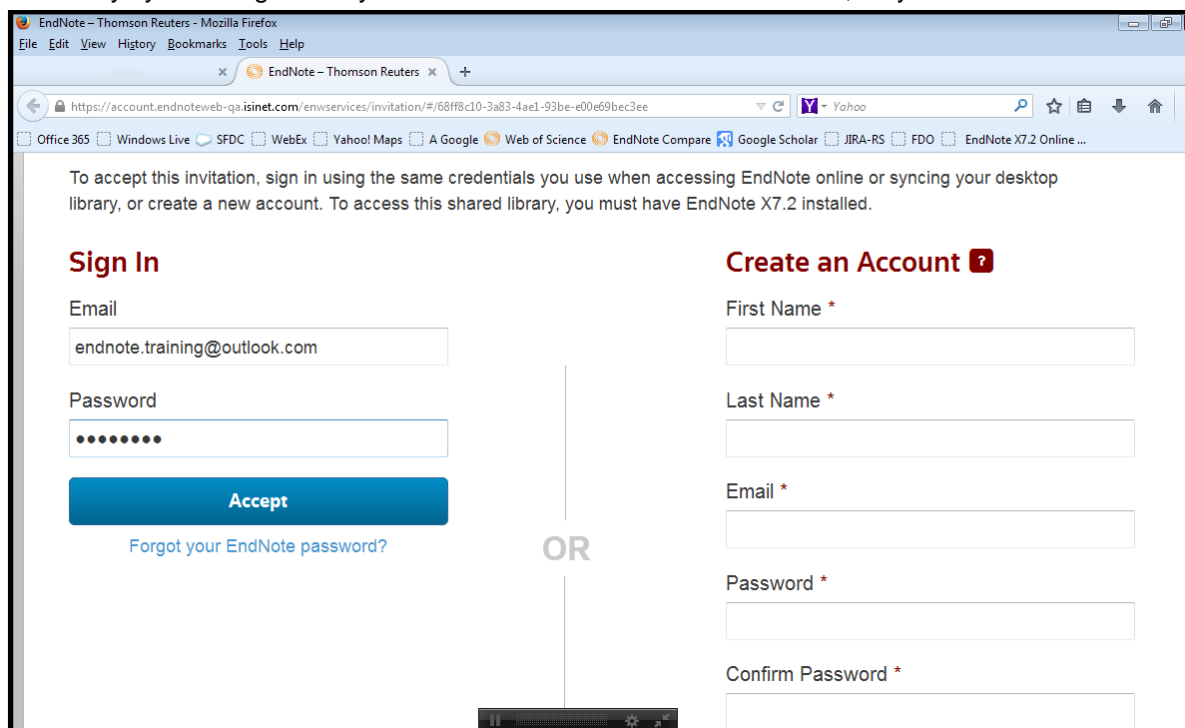
- The invitee's name will be added to the list at the top of the dialog with a *Pending* status to show they have not yet accepted the invitation. If you want to send a reminder of the invitation or remove them from the list, you can do that at any time.

This screenshot shows the 'Share with' dialog box after an invitation has been sent. The status of the invitee 'endnote.training@outlook.com' is now 'Pending'. An orange box highlights the 'Share with' and 'Status' columns, and a context menu is open over the 'Pending' status, showing 'Remove' and 'Remind' options. The 'Invite' button is now disabled.

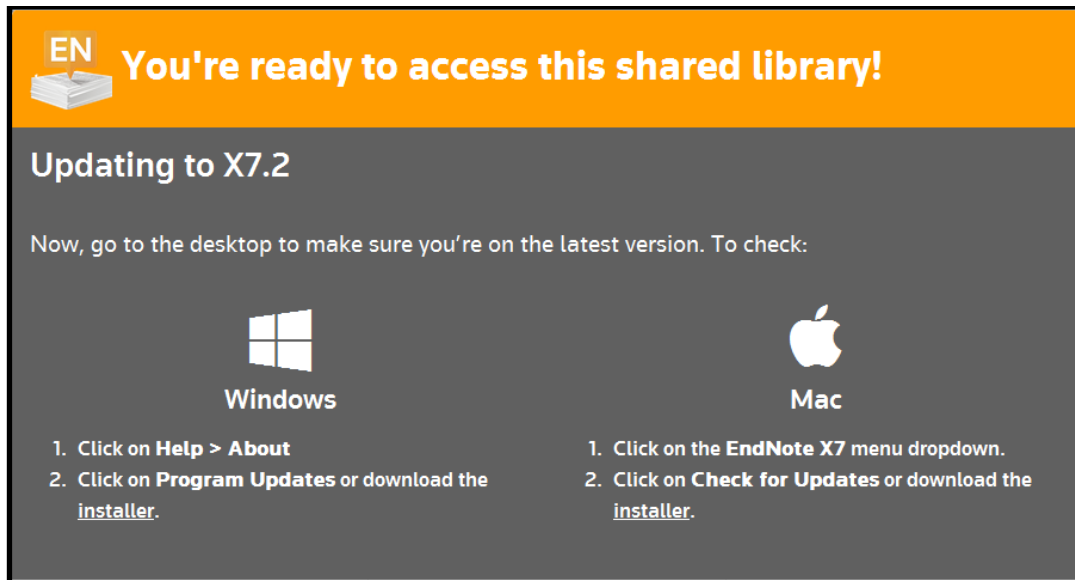
- The invitee will receive an email similar to the one shown below, inviting them to the shared library. They must click the **Accept** button to accept the invitation.



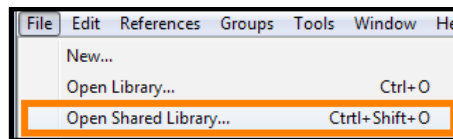
- The invitee will be directed to the page below, where they must logon to the EndNote online account they sync through. If they do not have an EndNote online account, they can create one here.



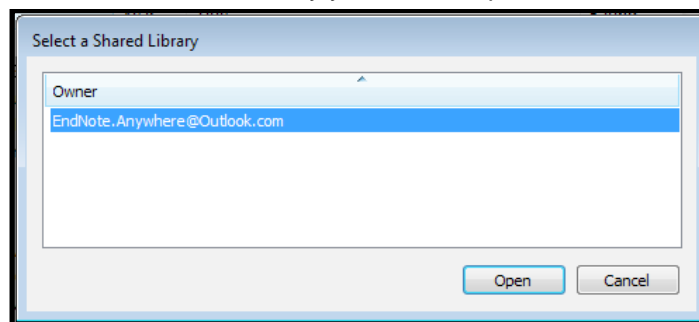
- The invitee will receive a notification that they are ready to access the shared library. There will be additional information on this page. Remember they must be using EndNote X7.2 or later in order to access the shared library.



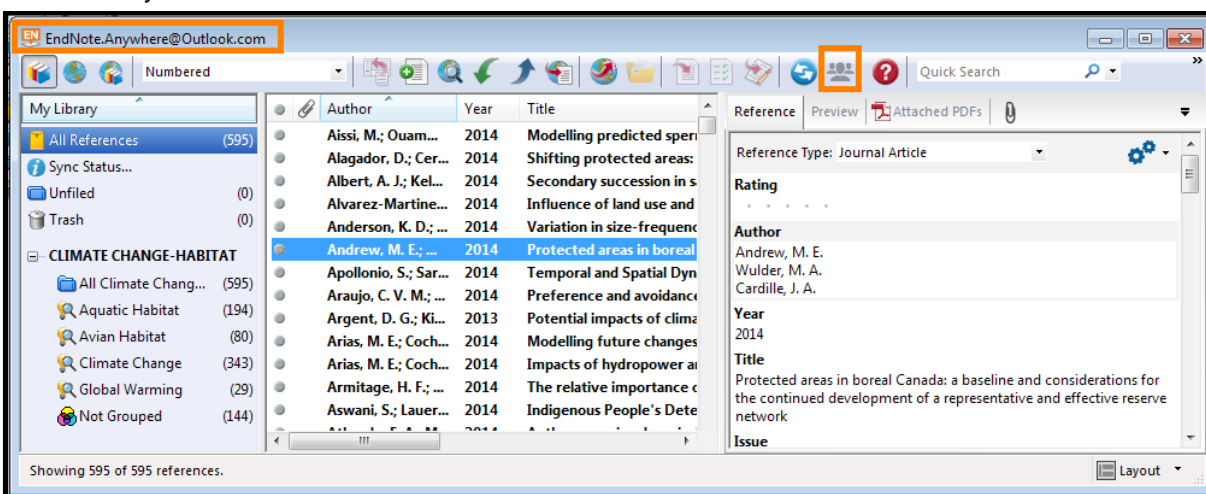
- To open a library that has been shared with you in EndNote, select **File** → **Open Shared Library**.



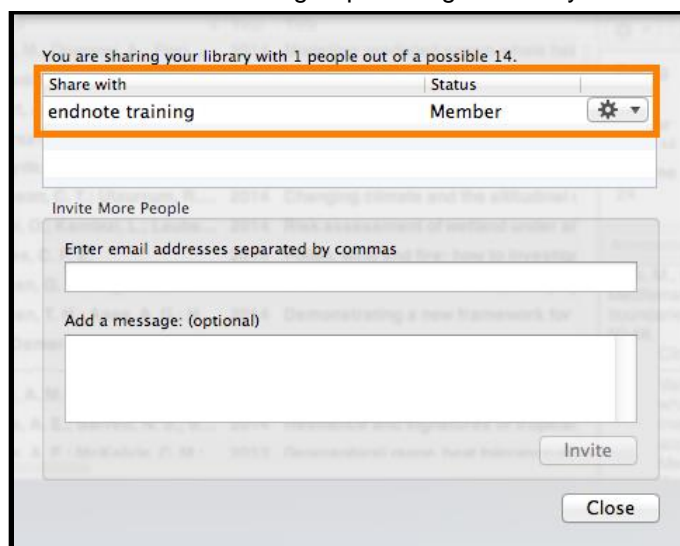
- You will see a list of all the libraries that have been shared with you. Remember that although you can only share one library with up to fourteen other people, an unlimited number of libraries can be shared with you. Select the shared library you want to open and click the **Open** button.



- The library will open, looking much like any other EndNote library. Note, however, that the name of the library will show the EndNote online account name of the owner and the *Share Library* button will be unavailable. You cannot share a library that you do not own with others, only the owner of a library can share it.



- The next time the owner of the library looks at the list of people she has shared the library with, she will see you named as a Member of the group sharing the library instead of as Pending.



7.3 SHARE GROUPS IN ENDNOTE ONLINE

If you do not want to share attachments, need to share references with people using older versions of EndNote or EndNote basic, need to control other users' access rights, or need to share with more than fourteen others, you can share groups through EndNote online.

With this method of sharing references, the owner of the references puts them in a shared EndNote online group. The owner of the references controls access to them, so one user could be given read-write access while another could be limited to read-only access. This method allows a large number of users to be given access to the same set of references for collaborative work. At the same time, if groups are created for

specific projects, it can also allow the owner to limit shared access to only the references for a project instead of the entire library.

EndNote online data is kept on secure Thomson Reuters servers. These servers are kept in locked rooms, with strictly limited employee access, and use SSL encryption for data security.

Please note the following restrictions.

- This method allows sharing of the EndNote desktop/online record data, but does not allow sharing of attachments, even within your own organization. However, you can share links to documents stored online. So, if you have a copy of a document in a SharePoint or DropBox folder, you can share a link to the external copy of the document using the URL field.
- Groups can only be shared with other EndNote online or basic users, and you will need to know the email addresses used as account names by such users to share references with them.

Note: Screenshots below show Windows examples, but the features will work the same way on Macintosh.

7.3.1 Creating an EndNote Online Library

Please see section 5 for information on setting up your EndNote online library if you have not done so already.

7.3.2 Share Your Group in EndNote Online

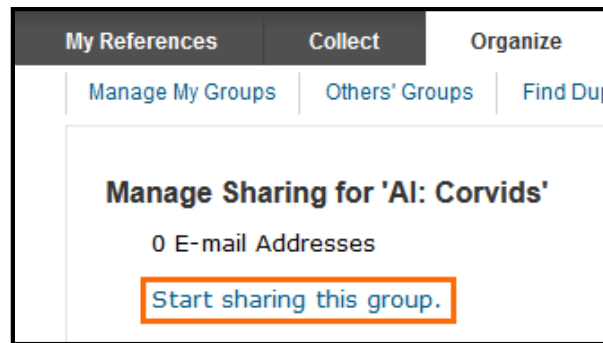
- Select **Manage My Groups** on the **Organize** tab in EndNote online to see a screen like that below.

| My Groups↑ | Number of References | Share | | |
|----------------------|----------------------|-------------------------------------|----------------|---------------|
| AI: Corvids | 19 | <input checked="" type="checkbox"/> | Manage Sharing | Rename Delete |
| AI: Parrots | 24 | <input type="checkbox"/> | Manage Sharing | Rename Delete |
| Bat: Chiroptera | 22 | <input type="checkbox"/> | Manage Sharing | Rename Delete |
| Bat: Echolocation | 6 | <input type="checkbox"/> | Manage Sharing | Rename Delete |
| Choc: Dark Chocolate | 39 | <input type="checkbox"/> | Manage Sharing | Rename Delete |
| SU: Sushi in General | 152 | <input type="checkbox"/> | Manage Sharing | Rename Delete |

New group

- Mark the **Share** box for the group you want to share, as shown above. You will see an icon with two people appear to the left of any shared group.
- Click the **Manage Sharing** button for your shared group to begin sharing it with others.

- Click the **Start sharing this group** link.



- You will see the Window below.

 A screenshot of a dialog box titled 'Add E-mail Addresses to 'AI: Corvids''. It contains instructions: 'Enter e-mail addresses. Use the Enter or Return key to separate addresses.' Below this is a text input field containing 'EndNote.Training@Examples.com', which is highlighted with an orange box. Below the field is the text '- OR -' and instructions to 'Select a text file with e-mail addresses separated by commas.' with a 'Browse...' button and 'No file selected.' text. A horizontal dotted line separates this from the access rights section, which has two radio buttons: 'Read only' and 'Read & Write'. The 'Read & Write' button is selected and highlighted with an orange box. Below this is a note: 'Note: Attachments are not shared, regardless of access privileges.' At the bottom, there is a blue 'Apply' button and a blue 'Close window.' link, both highlighted with orange boxes.

- Add the email address(es) for those you want to share the group with, with each email address on a separate line. These must be the email address they are using for their own EndNote online/basic account. You cannot share a group with somebody who is not using EndNote online/basic.
- Select the access rights you want to give this person.
 - Read only* access will allow them to view your references, copy your references into their own EndNote online library, or use your references in Microsoft Word, but it will not allow them to edit your references.
 - Read & Write* access will allow them to view your references, copy your references into their own EndNote online library, or use your references in Microsoft Word, and it will also allow them to edit your references, add new references, and delete your references. Changes made to your references by others with Read & Write access will also be synchronized back to your EndNote desktop library if you are synchronizing your libraries.

- Click on the **Apply** button to save the options, then the **Close window** link.
- You should now see something like the screen below, showing who you have shared the group with and what level of access you have given them. You can change the level of access or stop sharing the group with them at any time.

Manage Sharing for 'AI: Corvids'

1 E-mail Address

| E-mail Address ↑ | Read only | Read & Write | | |
|-------------------------------|-----------------------|----------------------------------|------|--------|
| EndNote.Anywhere@examples.com | <input type="radio"/> | <input checked="" type="radio"/> | Edit | Delete |

Add More

Note: Attachments are not shared, regardless of access privileges.

7.3.3 What the User You Shared Your Group with Will See

- The user you shared your group with will see your group show up under a *Groups Shared by Others* heading in their EndNote online library. The icon of two people with a pencil you see below will only show when they have been given *Read & Write* access to the group.



- If the user the group was shared with selects **Others' Groups** from their **Organize** tab, they will see the screen below. Here they can see the EndNote online account owner of the group and can set if the group will be shown on the *My References* tab or used in Microsoft Word with Cite While You Write.

| My References Collect Organize Format Match <small>NEW!</small> Options Connect ^{Beta} | | | | | | |
|---|-------------------------------------|------------------------------|-----------------------------|----------------------|-------------------------------|--|
| Manage My Groups Others' Groups Find Duplicates Manage Attachments | | | | | | |
| Others' Groups | | | | | | |
| Access | Show | Use for Cite While You Write | Groups Others Share with Me | Number of References | Owner | |
| | <input checked="" type="checkbox"/> | <input type="checkbox"/> | AI: Corvids | 19 | EndNote.Training@Examples.com | |

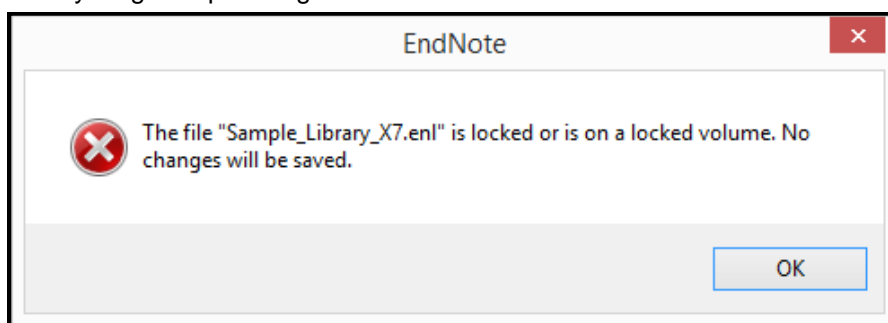
- Note that groups and references that others share with you are not actually part of your library and will not sync to your EndNote library on the desktop.

7.4 PUT A READ-ONLY ENDNOTE LIBRARY ON A NETWORK DRIVE

If your group needs to share access to attachments as well as reference data, but for some reason cannot use EndNote Sync, needs to share attachments with more than fourteen others, or is using a version of EndNote previous to EndNote X7, another option is to put a read-only copy of the library on a network drive. The library will need to be read-only because only one person at a time can access an EndNote library with read-write access, while an unlimited number of people can access a read-only library at the same time. This means one person should be in charge of the master library, and keep it on their own computer, then periodically put a read-only copy of the library on the network drive.

Your network administrator can set up folders on network drives with security settings to allow only one person to add files while everybody else has read-only access. If you can enlist your network administrator's help, this is best. Please note that you should not put a *read-write* copy of a library on a network drive for two reasons—

1. Only one person at a time would be able to use the library.
 2. Unless the server is in the same building as everybody who might be making changes, there is a risk of corrupting the library.
- When you open a read-only library, you will see a screen like the one below. Click the **OK** button to open the library. You will be able to use the library with Cite While You Write, search it, print from it, and do anything except change it.



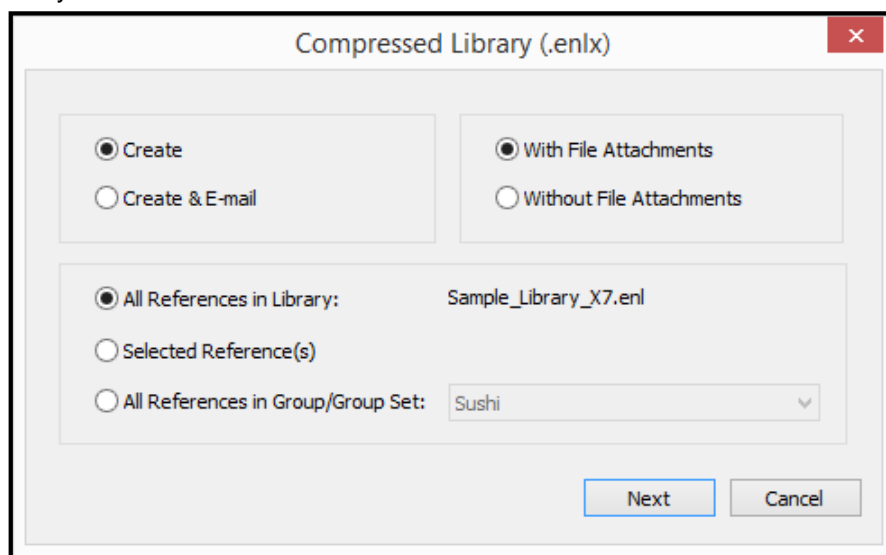
- The suggested "best method" for putting your read-only copy on the network drive is to first make a compressed library with all records and all attachments on your hard drive, then copy that file to the network location and open it there. It will uncompress to create the .enl file and .data folder necessary to work in the library.

7.5 SEND A COMPRESSED LIBRARY

If you are unable to use the methods described above, you could instead send a compressed library through email, burn it to disk, or put it on a flash drive or on a shared cloud service. This method allows you to control exactly which groups of references are included, and whether or not attachments are included.

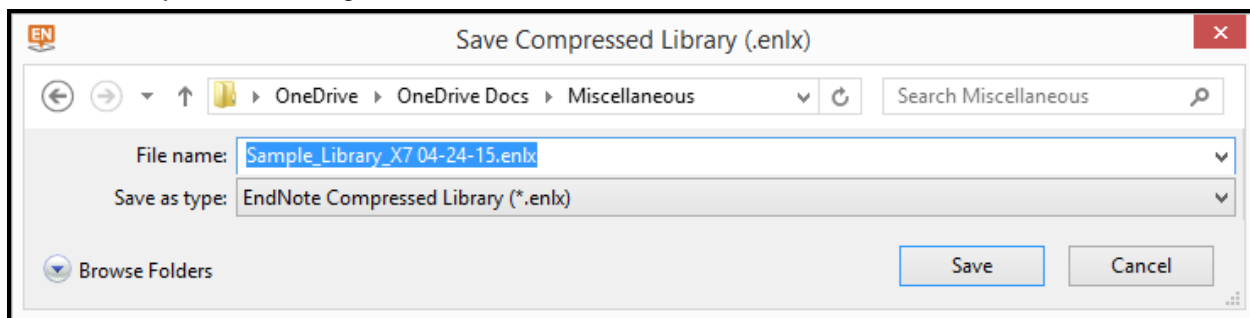
The disadvantage of this method is that users are not working with the same copy of the library. Each person would have their own copy of the library and changes to references could be made in each copy differently.

- With the EndNote library you want to compress open in EndNote, select **Compressed Library** from the **File** menu. You should then see the screen below, which you saw earlier in this chapter, but because you are not making a complete backup copy this time you can limit the references to only those you want to send.



- Select the **Create** option to create a compressed library you can save on your computer and then attach to an email. The *Create & E-mail* option will work with most MAPI-compliant email programs, but may not work with all email programs. It will not work with web email programs such as Gmail.
- Select the **With File Attachments** option to include all attachments for the references you are sending, not just the PDFs. Select **Without File Attachments** to make the file smaller and to remove PDFs and other attachments.
- The bottom part of the window gives you options on which references will be included in the compressed file.
 - *All References in Library* would include all of the references in your library. This option is also an excellent way to create backup copies of your libraries. Please note that you may be unable to attach very large libraries with attachments to emails or even put them on disks because of operating system limitations on the size of zipped/compressed files.
 - *Selected Reference(s)* will include only the references you have highlighted (selected) in the library.
 - *All References in Group/Group Set* will allow you to include only the references in a specific group or group set.

- Click the **Next** button to see the screen below, where you can choose where the compressed library will be saved and rename it, if desired. In the example below the date has been added to the library name to help identify it later. Please note, again, that a compressed library can be saved to an OneDrive folder, as in this example, **but it cannot be opened and safely worked with in an OneDrive folder**. The library would need to be moved out of OneDrive to be able to open it and work with it safely. See section 7.1.1 for more information on the dangers of keeping a working library in cloud storage folders such as OneDrive.



- Click the **Save** button to save your compressed library. Please note that a large library with many attachments may take a long time to compress. The compressed library will have a .enlx extension.
- The compressed library can now be attached to an email, burned to disk, or put on a network or cloud drive for distribution.
- When the recipient wants to use the library, they will need to place it on their computer in its working location, then select **Open→Open Library** from the **File** menu in EndNote and select the compressed library file as the file they wish to open. When the file uncompresses it will become a .enl file and .data folder just as it was on the original user's computer.

7.6 THE TRAVELING LIBRARY

7.6.1 Using the Traveling Library to Create Bibliographies in Shared Documents

If you need only to create a Word document with references from multiple libraries, and do not need to share the actual data in the library or attachments, you can use the traveling library. This feature is only available in Microsoft Word.

Whenever you insert an EndNote citation in a Word document, you are inserting a copy of the bibliographic data for that citation in the field code for the citation. That data becomes part of the paper, and when an EndNote-using colleague works on that paper, they don't need a copy of your library because all of your citation data is embedded in the paper's traveling library.

- Here's an example of a simple citation and bibliography entry from a sample Word document.

Text.(Pepperberg, 2011)

Pepperberg, I. M. (2011). Avian cognition and social interaction: Fifty years of advances. *Interaction Studies*, 12(2), 195-207. doi:10.1075/is.12.2.01pep

- However, that citation came from EndNote, so it has the data seen below “traveling” in the citation and able to be used by any EndNote user editing the paper. This data is usually invisible to the reader, but accessible to EndNote.

```
Text.{ ADDIN EN.CITE
<EndNote><Cite><Author>Pepperberg</Author><Year>2011</Year><RecNum>2313</RecNum><DisplayText>(Pepperberg, 2011)</DisplayText><record><rec-number>2313</rec-number><foreign-keys><key
app="EN" db-id="50wxdpzd9vd5r7e9t5b595djrfpttrxw9avp"
timestamp="1363371157">2313</key></foreign-keys><ref-type name="Journal Article">17</ref-
type><contributors><authors><author>Pepperberg, I. M.</author></authors></contributors><auth-
address>[Pepperberg, Irene M.] Harvard Univ, Dept Psychol, Cambridge, MA 02138 USA. [Pepperberg,
Irene M.] Brandeis Univ, Waltham, MA 02254 USA.&#xD;Pepperberg, IM (reprint author), Harvard Univ,
Dept Psychol, William James Hall,33 Kirkland St, Cambridge, MA 02138
USA.&#xD;impepper@media.mit.edu</auth-address><titles><title>Avian cognition and social
interaction: Fifty years of advances</title><secondary-title>Interaction Studies</secondary-title><alt-
title>Interact. Stud.</alt-title></titles><periodical><full-title>Interaction Studies</full-title><abbr-
1>Interact. Stud.</abbr-1><abbr-2>Interact Stud</abbr-2></periodical><alt-periodical><full-
title>Interaction Studies</full-title><abbr-1>Interact. Stud.</abbr-1><abbr-2>Interact Stud</abbr-
2></alt-periodical><pages>195-
207</pages><volume>12</volume><number>2</number><keywords><keyword>avian
cognition</keyword><keyword>avian social learning</keyword><keyword>avian observational
learning</keyword><keyword>avian communication</keyword><keyword>parrots psittacus-
erithacus</keyword><keyword>white-crowned sparrow</keyword><keyword>african grey
parrot</keyword><keyword>song development</keyword><keyword>videotaped
instruction</keyword><keyword>intelligence</keyword><keyword>budgerigars</keyword><keyword>i
nformation</keyword><keyword>context</keyword><keyword>pigeon</keyword></keywords><dates
><year>2011</year></dates><isbn>1572-0373</isbn><accession-
num>WOS:000295010300001</accession-num><work-type>Editorial Material</work-
type><urls></urls><electronic-resource-num>10.1075/is.12.2.01pep</electronic-resource-
num></record></Cite></EndNote>}
```

Pepperberg, I. M. (2011). Avian cognition and social interaction: Fifty years of advances. *Interaction Studies*, 12(2), 195-207. doi: 10.1075/is.12.2.01pep

- Below is the same reference, but reformatted with the Vancouver style instead of the APA. That's not anything special for EndNote. However, this citation and bibliography were formatted *with no libraries open in EndNote!* That means the only information EndNote had to work with was the data available in the traveling library.

Text.{1}

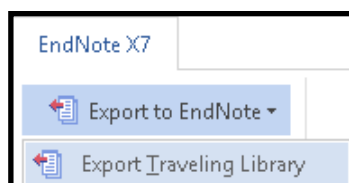
1. Pepperberg IM. Avian cognition and social interaction: Fifty years of advances. *Interact Stud*. 2011;12(2):195-207.

- This means you can send a copy of your paper to a colleague using EndNote, and they do not need a copy of your library. They can add citations from their own EndNote library, and EndNote will merge your citations and theirs together to create a single bibliography.

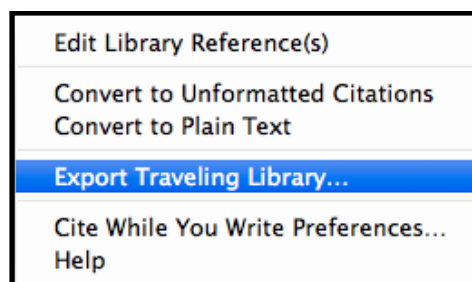
7.6.2 Exporting the Traveling Library

Data in a traveling library can be extracted and put in your own EndNote library.

- On the Cite While You Write tab in Word for Windows, click **Export to EndNote** in the **Tools** group, then select **Export Traveling Library** from the drop-down list. On Macintosh, select **Export Traveling Library** from the **Tools** drop-down list on the floating EndNote toolbar.

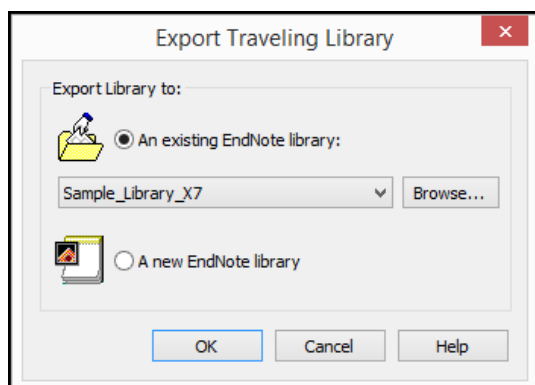


Windows

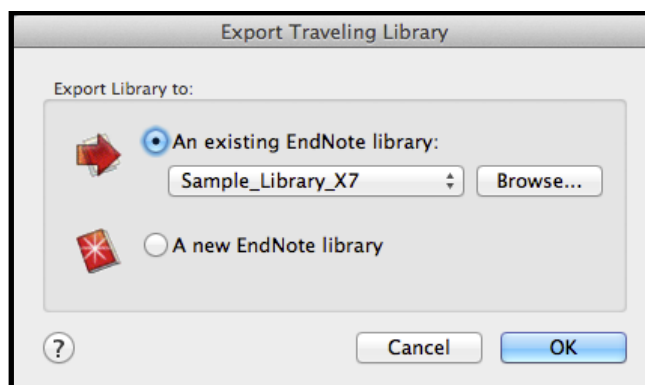


Macintosh

- Select the EndNote library to import the references to, or create a new library. EndNote will filter out duplicate references that came from the library you select.

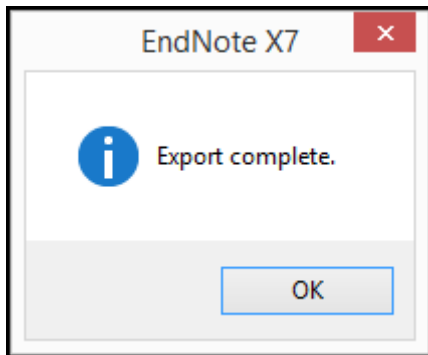


Windows

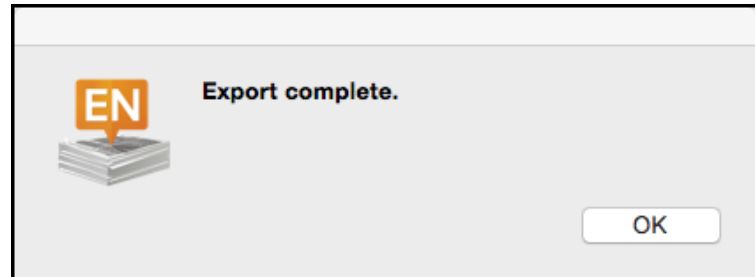


Macintosh

- For large documents with many references, it may take some time for all the references to be exported, so be patient. EndNote will show a confirmation message when the export is complete, as shown below.

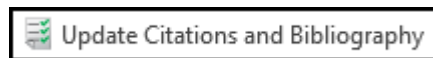


Windows

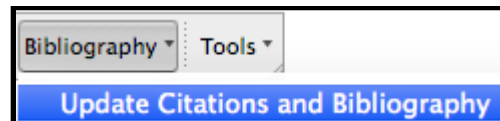


Macintosh

- In the Word document, use the Update Citations and Bibliography command to update the citations in the paper from the new records in the open EndNote library.



Windows



Macintosh

The method of collaboration you decide to use will depend on your situation, but hopefully this overview will help you decide which method is best for you.

7.7 SUMMARY COMPARISON OF SHARING METHODS

| Features | Share Full Library through EndNote Sync | Share Groups through EndNote Online | Share a Read-Only Copy of Library on a Network Server | Share a Compressed Library |
|--|---|---|---|----------------------------------|
| Can share all references and groups in library | Y | N | Y | Y |
| Can share attachments | Y | N | Y | Y |
| All members of sharing community can edit them | Y | Y ¹ | N | Y ² |
| All changes automatically available to all members of the sharing community | Y | Y | N ³ | N |
| Maximum number of members in sharing community | 15 | NA ⁴ | NA ⁴ | NA ⁴ |
| Library owner can set read-write or read-only access rights for other members of the community | N | Y | N | N |
| Shared library resides on customer's server | N | N | Y | NA |
| Shared library resides on Thomson Reuters EndNote online server | Y | Y | N | NA |
| All members of the community working with the same set of references | Y | Y | N | N |

¹ If owner has given read-write permission.

² Everyone would have separate copies of the library and could only edit their own copy.

³ Changes to the library could only be made by the owner. Others in the sharing community would only see changes after the owner uploads them to the copy on the server.

⁴ No set limit

8 USING THE LABEL FIELD AS A CUSTOM IDENTIFICATION NUMBER

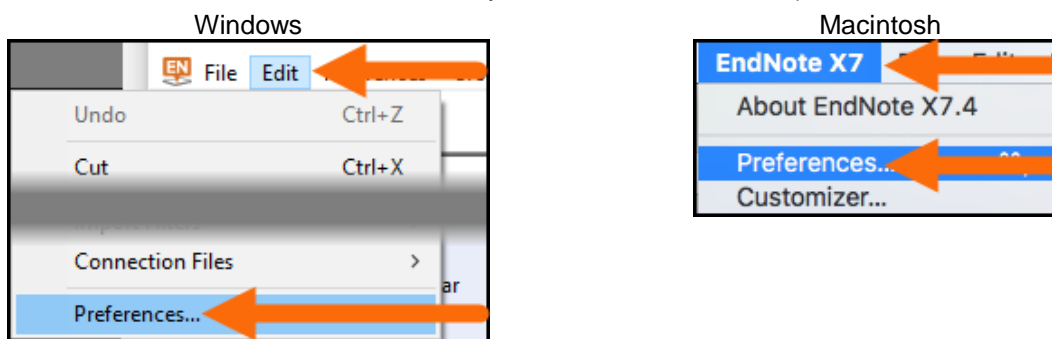
The EndNote record number is not a permanent identification number and can change when using EndNote Sync, if a record is copied into a new library, or even if a record is cut and then pasted back into the same library. If you prefer an unchanging field to identify a record in both your library and for Cite While You Write, consider using the Label field in EndNote.

In your original library, you can copy the record number to the Label field for selected references. It is best to assign all Label field numbers in the same copy of the library, to be sure the number will always be unique. Remember that the new Label number may not match the record number in all copies of the library.

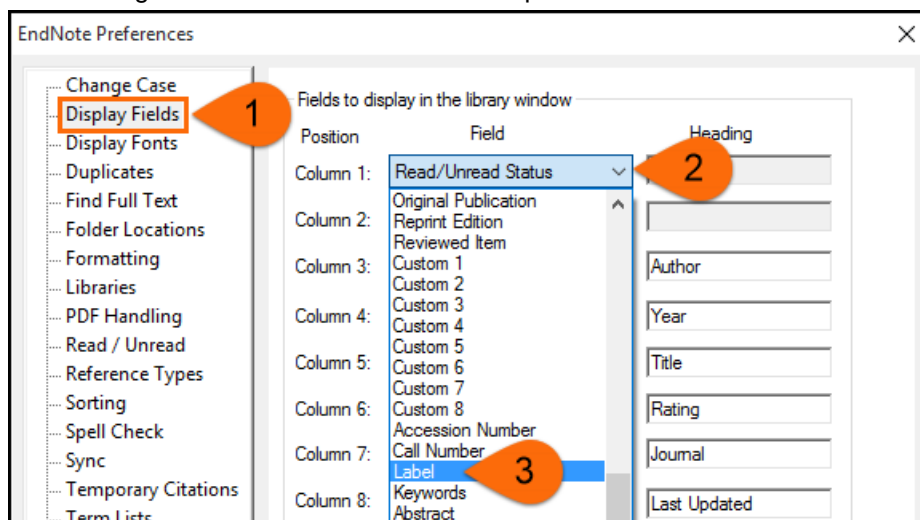
8.1 SET THE LABEL FIELD TO SHOW IN THE LIBRARY DISPLAY

Setting the Label field to show in the library display will allow you to easily see which records do not have text in the Label field, to avoid copying the record number for a record that already has data in that field.

- Open the EndNote preferences by selecting **Edit**, then **Preferences** on Windows or **EndNote X7**, then **Preferences** on Macintosh. (Note, below this point directions that are the same on both Windows and Macintosh will show only the Windows illustration.)

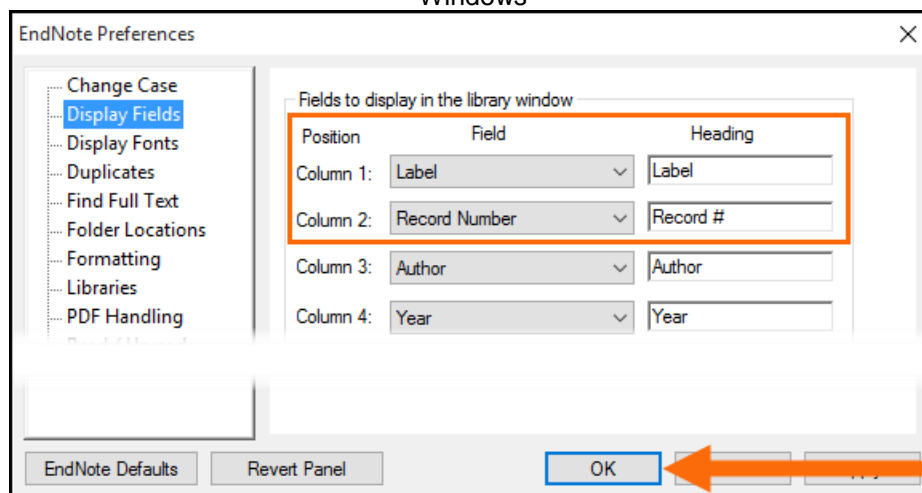


- Click **Display Fields** at the left, then select the **Label** field from the drop-down list for the column you want to assign to the Label field. In this example column 1 is selected.

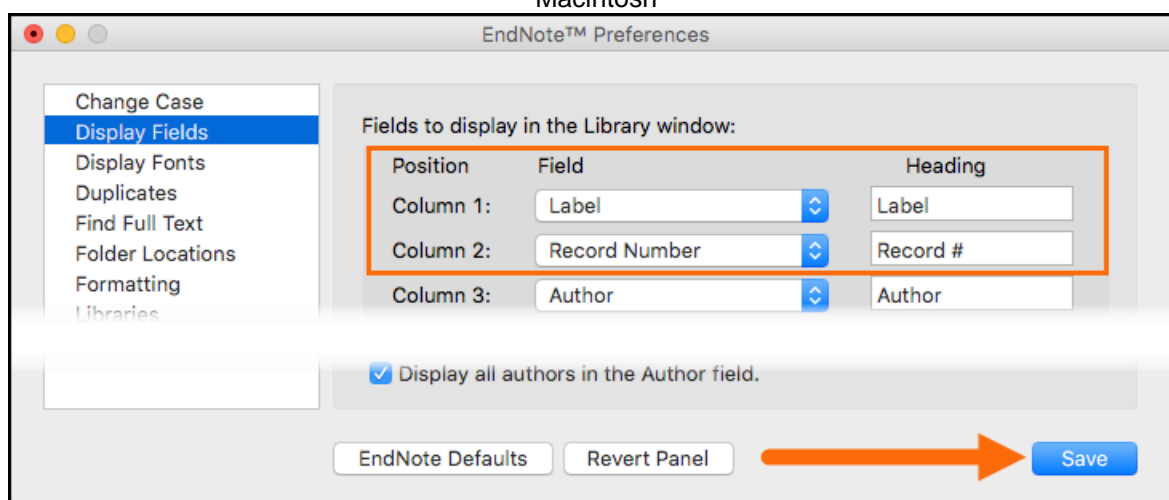


- For my example I have chosen to show both the Label field and the Record Number field, so that I can easily compare the two in my library display. Note that I have also edited the heading for the Record Number field to shorten “Record Number” to “Record #,” to reduce the column width necessary to show the heading. Click the **OK** button to close and save the changes on Windows. On Macintosh, click the **Save** button, then close the window.

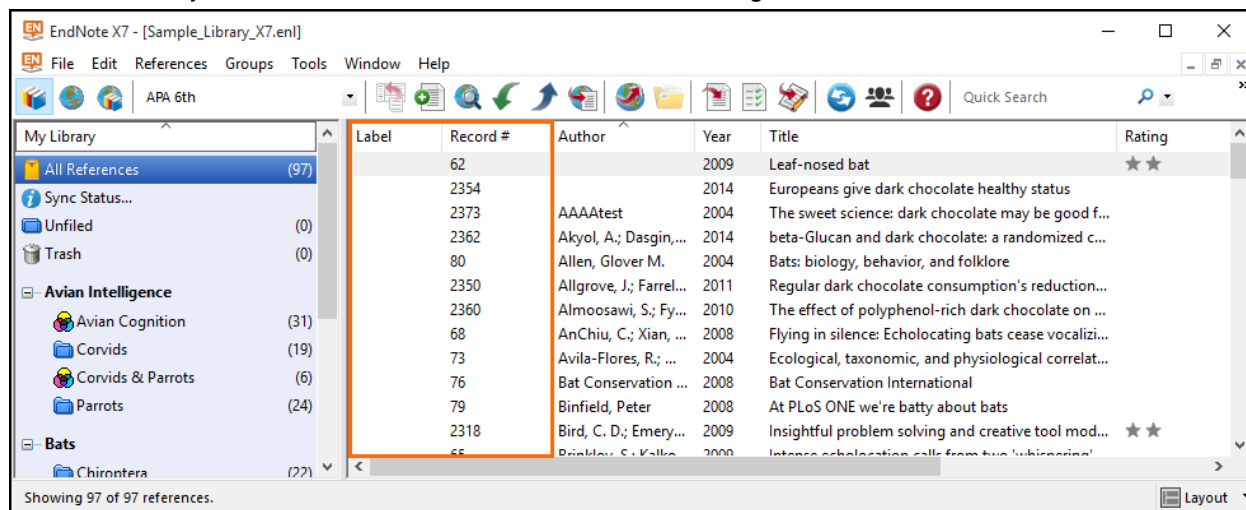
Windows



Macintosh



- You should now see a screen showing the Label field, as in the example below. This will allow you to easily select records that do not have a number assigned to the Label field.

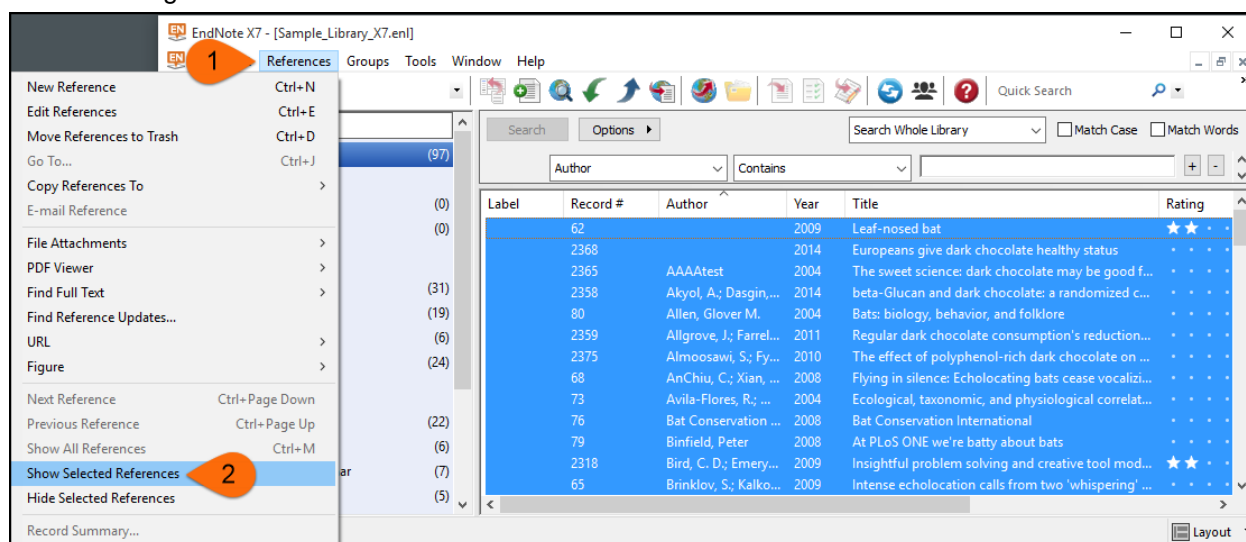


8.2 MAKE A BACKUP OF THE LIBRARY

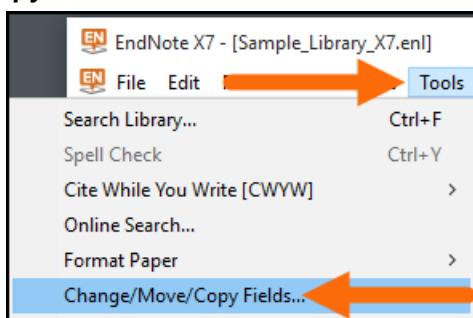
If you make a mistake while copying the record number to the Label field, **there is no way no undo the change, so make a backup copy of the library before starting this process.** See section 5.1.1 for instructions on creating a backup.

8.3 COPYING THE RECORD NUMBER TO THE LABEL FIELD

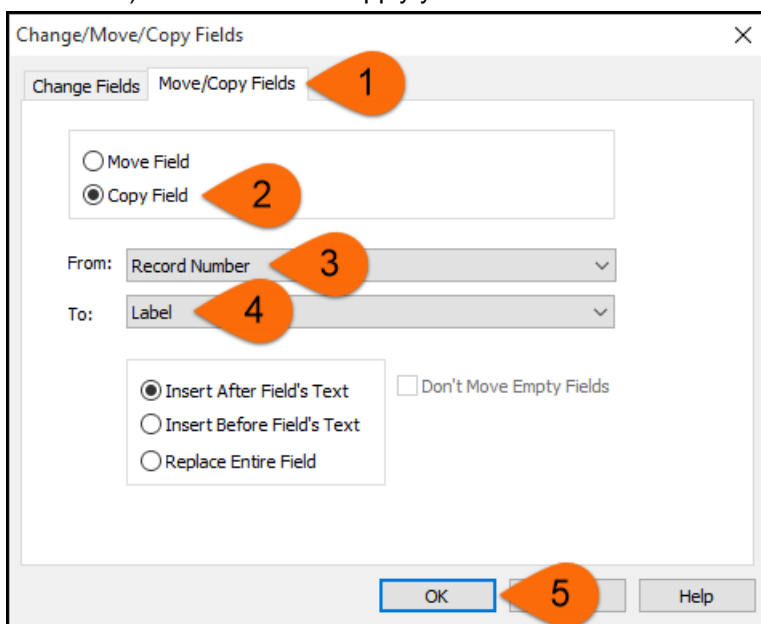
- Select all the records for which you intend to copy the record number to the Label field, then select **Show Selected References** from the **References** menu. EndNote will apply the change to all references showing in the list, so you need to limit the references showing to those you want to change.



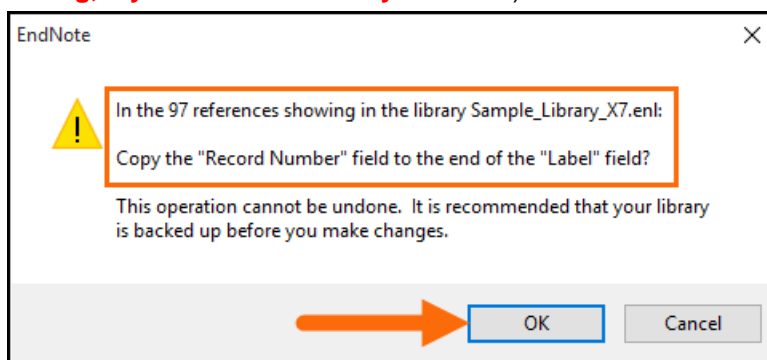
- Select **Change/Move/Copy Fields** from the **Tools** menu.



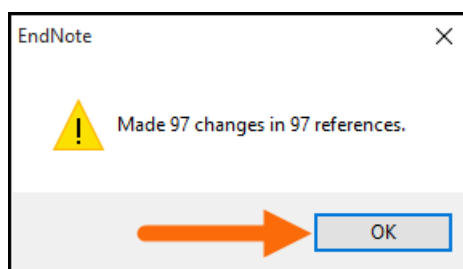
- In the *Change/Move/Copy Fields* window, select 1) the **Move/Copy Fields** tab, 2) **Copy Field**, 3) **Record Number** as the field to copy from, 4) **Label** as the field to copy to. You will have options to insert the record number after or before existing text in the Label field, or to replace all text currently in the field, so if you have existing text in the field it is possible to keep it and append the record number. Click 5) the **OK** button to apply your choices.



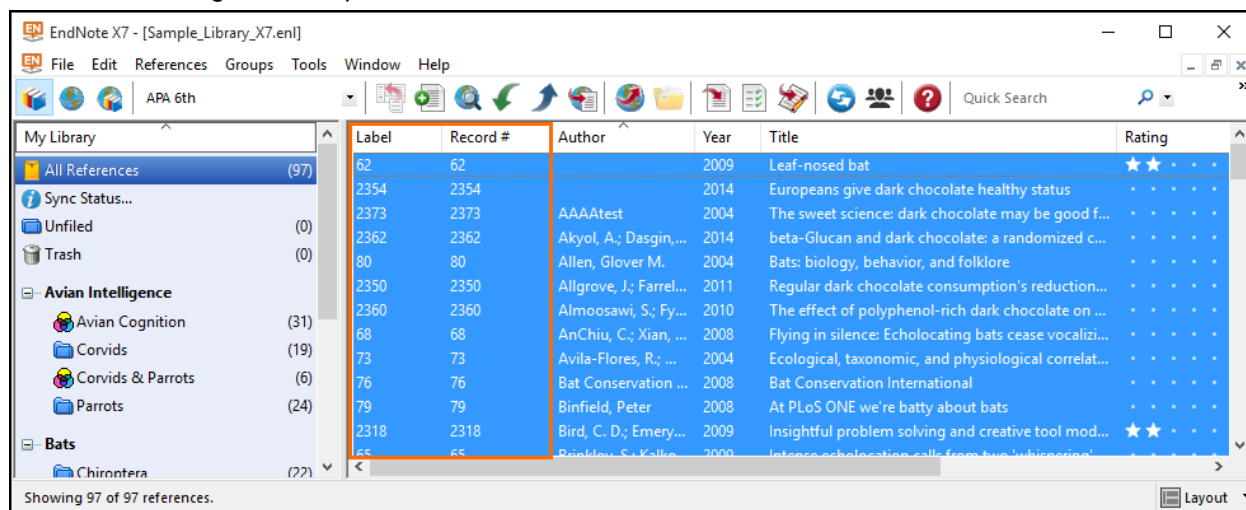
- EndNote will report the number of references the change will apply to and which fields will be affected, and ask for a confirmation. If the message shows the correct information, click the **OK** button. (**Reminder: There is no Undo command if you make a mistake, so backup the library before continuing, if you have not already done so.**)



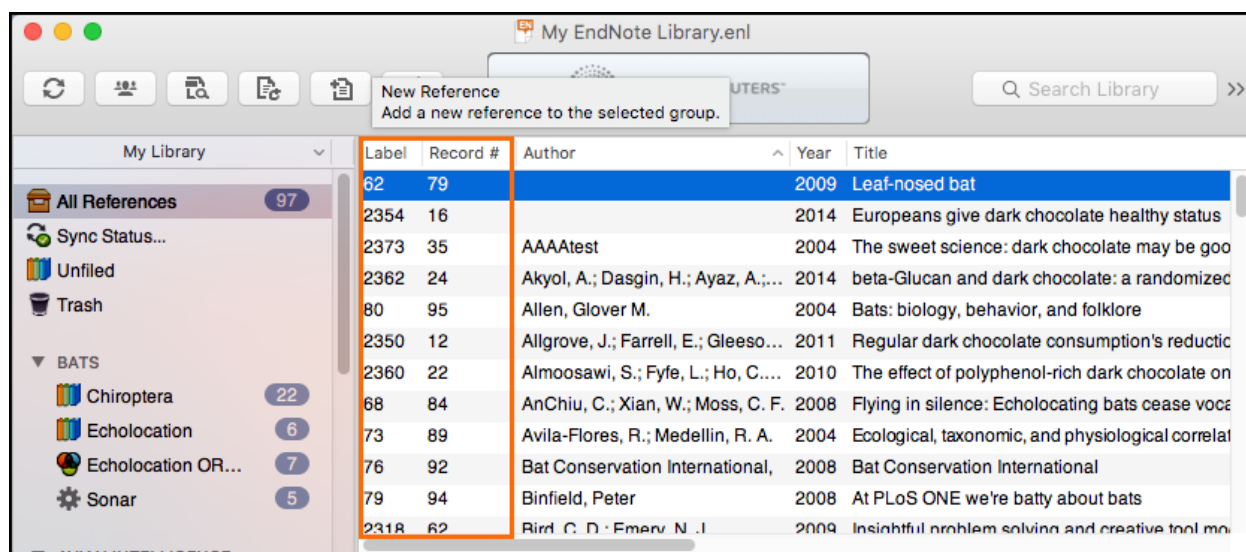
- When finished with the changes, EndNote will report the number of references changed. Click the **OK** button to close the window.



- The library now shows the same number for the record number and in the Label field for this library on the original computer.



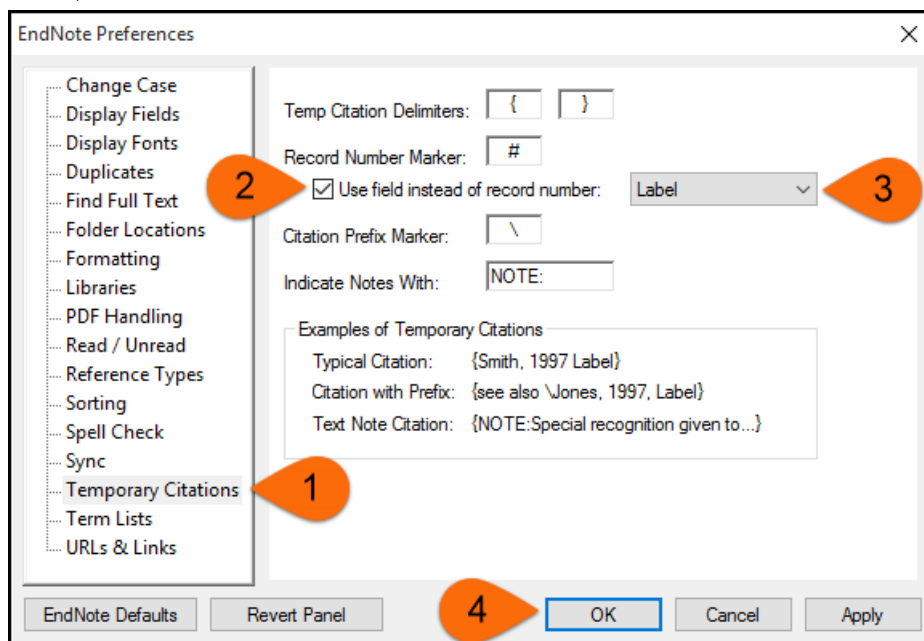
- However, when that library is synced to a second computer, the record number is no longer the same as the contents of the Label field. The label number will remain constant even though the record number changes, and can now be used as an unchanging tracking number and in Cite While You Write.



Please note the process above would need to be repeated whenever new references were added to the database, or the Label field would need to be manually updated. ***We suggest always backing up the library before making any major changes in the library.*** See section 5.1.1 for instructions on creating a backup.

8.4 SETTING CITE WHILE YOU WRITE TO USE THE LABEL FIELD

- Open the preferences again and 1) select **Temporary Citations** from the list at the left, 2) mark the box to **Use field instead of record number**, 3) select **Label** as the field to be used, and 4) click the **OK** button on Windows to save the changes and close the window (on Macintosh, click the **Save** button and close the window). This change should be made by anybody who is using the Synced library, on all their computers, so that references inserted in the document by all persons working on it will use the Label field. If someone does not set this option, EndNote can still format the citation, but it will not use the Label field information if the record is unformatted.



- In the future, temporary citations will be inserted into Word documents with the first author's last name, the year, and the label number you assigned instead of the record number. Temporary citations should look something like this:

{Volk, 2012, 2376}.

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