



Reference Management using EndNote

By the way ...

... any technique may be misused ...

Therefore,

- ... do not import all the references you can find.
- ... consider creating different reference lists or databases for different purposes.
- ... do not cite a document that you have not had a look at.

Why citations?

You have to put your research into a context:

- What has been done previously (by others) that is relevant to your work?
- Which methods that were already available did you use?
- How do your results refer to the results presented by other researchers?

Citation Styles

A number of citation styles are in common use depending on the specific scientific discipline. The most common styles are APA, Chicago, AMA, and MLA.

Information on citation styles can be found on the web (link [1](#), [2](#)) and e.g. in the following book:

Lipson, C. 2005. [How to write a BA thesis](#) : a practical guide from your first ideas to your finished paper. Chicago University Press.

Bibliographic Management Systems (BMS)

The basic features of BMS are importing, storing, searching, citing of bibliographic references and generating a reference list in an automated way.

Additional features are commenting on reference entries, searching databases from the BMS, and adding supplementary information, e.g. pictures to an entry, and sharing references with colleagues.

Bibliographic Management Systems (BMS)

There are now quite a number of different BMS. They have different features and limitations, some are free while others are commercial programs, and most are available for several or even all common computer operating systems.

A comprehensive comparison can be found on the internet in [German](#) and [English](#) (you might double-check this information before you base any decision on it).

EndNote (version 20)

- By Thomson Research Soft
- Probably the leading bibliographic software product on the market.
- EndNote, EndNote Web, EndNote Click
- Many connection files to databases and catalogues are available.
- Highly integrated with Web of Science and Microsoft Word.
- At ETH Zurich available via [IT-Shop](#).

EndNote – Getting Started

- Open an existing EndNote library (.enl): *File / Open Library*
- Example file *Paleo.enl* (see *Examples* folder at C:\Programme\EndNote 20)
- Create a new library: *File / New*
- Assign a name 'X' to the new library
- When creating a new library besides the library itself (X.enl) a data folder (X.Data) is created

EndNote Library – Basic Elements

The screenshot shows the EndNote 20 Library window. The interface includes a menu bar (File, Edit, References, Groups, Library, Tools, Window, Help), a toolbar with icons for search and editing, and a main workspace. The workspace is divided into a search panel at the top, a list of references in the center, and a detailed view of a selected reference on the right. The reference list has columns for Section, Author, Year, Title, Rating, and Journal. The detailed view shows fields for Author, Title, Year, Journal, Volume, Issue, Pages, and Start Page.

Labels in the image point to the following elements:

- Library Window**: Points to the main application window.
- Search Panel**: Points to the search bar and options at the top.
- Toolbar**: Points to the icons for search and editing.
- Column Headings**: Points to the headers of the reference list table.
- Groups**: Points to the left-hand sidebar showing a tree view of reference groups.
- Edit / Preview / PDF Window**: Points to the detailed view of a selected reference on the right.

EndNote Library – Toolbar Elements

The image shows a close-up of the EndNote toolbar. It contains several icons: a gift icon for sharing, a person icon for adding references, a document icon for exporting, and a globe icon for creating citation reports. The toolbar also includes search options and a search button.

Labels in the image point to the following elements:

- Share Group**: Points to the gift icon.
- Find Full Text**: Points to the globe icon.
- Add Reference**: Points to the person icon.
- Export References**: Points to the document icon.
- Create Citation Report**: Points to the globe icon.

EndNote Library – Sorting & Finding

- to sort data, click the corresponding column heading
- click twice to reverse the order
- advanced search or sorting options: use the *Search Panel*
- to find a certain reference, click a column heading and type the first two letters of e.g. the name of the first author you are looking for
- use * as wildcard when searching
- full texts of attached pdf files can be searched in the *Search Panel*

EndNote Library – edit references

- changes in reference entries can be done in the *Edit / Preview / PDF* window:

The screenshot shows the EndNote interface. On the left, a search panel is visible with 'Author' selected and 'Contains' as the search criteria. Below it, a table of references is shown. The reference 'Arnett, E. B.; Hein, ...' from 2013 is highlighted in green and circled in red, with an arrow pointing to it from the label 'selected reference'. On the right, the 'Edit' window for this reference is open, showing the 'Author' field with the names 'Arnett, E. B.', 'Hein, C. D.', 'Schirmacher, M. R.', 'Huso, M. M.', and 'Szewczak, J. M.' listed. This list of authors is circled in red, with an arrow pointing to it from the label 'editing'.

Section	Author	Year	Title	Rating	Journal
	Allen, Glover M.	2004	Bats: biology, behavior, and folk...		
	Arnett, E. B.; Hein, ...	2013	Evaluating the Effectiveness of an...		PLoS One
	Avila-Flores, R; Me...	2004	Ecological, taxonomic, and physiol...		Journal of Mammalogy

EndNote – Creating/Importing References

References might be

- created manually (e.g. via *References* menu).
- imported from a bibliographic database via an online search within EndNote (see *Tools* menu).
- imported from files (e.g. created by exporting references from bibliographic databases or library catalogues to them; see *File* menu).
- exported from a database or library catalogue (e.g. [swisscovery](#)) directly to an EndNote library.
- by importing pdf files that contain the DOI

EndNote – Online Search

Open the online search via *Tools* menu or toolbar and select the bibliographic database to be searched. Then use the available search options to retrieve the references of interest. Note that there are usually more search and import options available in the database itself.

EndNote – Import References from a File

Open the import interface from the *File* menu and choose the file to be imported as well as the options on filters (*Import Option*), duplicates, and text translation.

To transfer references from one EndNote library to another: 1) export to text file 2) import from this.

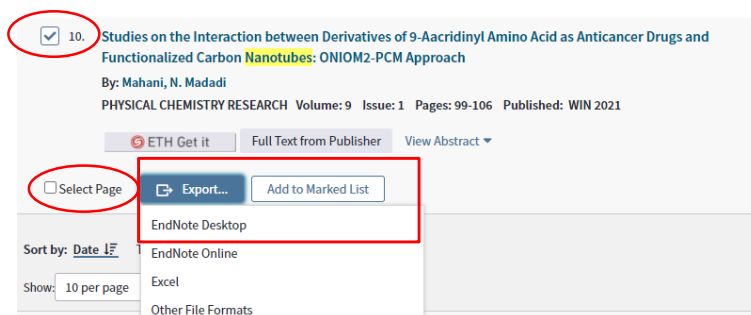
EndNote – Importing pdf files

In the *Import File* dialog choose the pdf file to be imported as well as the *Import Option* 'PDF':

The pdf file must contain the DOI to enable identification of the bibliographic data. Whole folders containing pdf files might be imported.

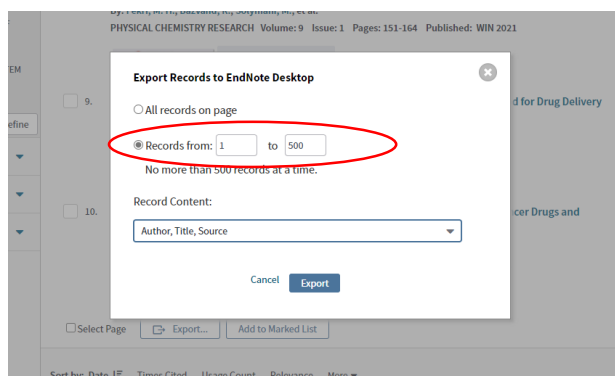
EndNote – Export References from Web of Science

After conducting a literature search in [Web of Science](#) (WoS) you can export either selected references or all references on the page shown and select EndNote as destination for export:



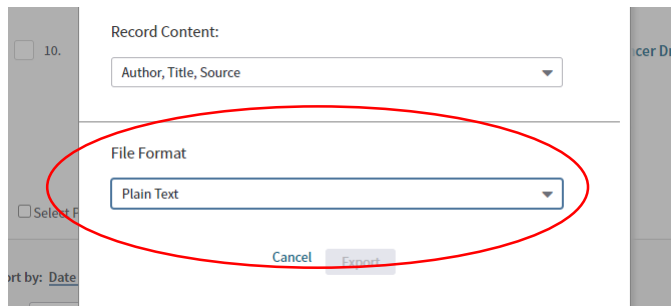
EndNote – Export References from Web of Science

If you did not select single references, also a range can be specified; please note: no check for duplicates is conducted with direct export to EndNote.



EndNote – Export References from Web of Science

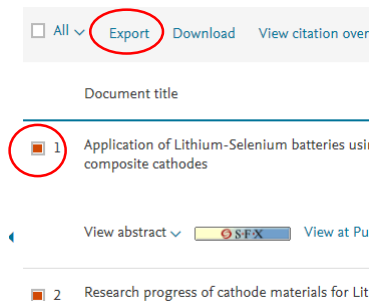
For saving records in a textfile, choose first 'Save to Other File Formats' and then 'Plain Text':



Choose 'ISI-CE' as *Import Option* in EndNote.

EndNote – Export References from Scopus

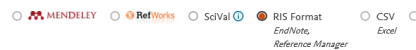
Select Records and use the 'Export' function:



Export document settings

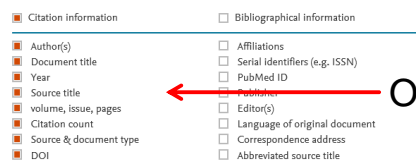
You have chosen to export 2 documents

Select your method of export



Choose

What information do you want to export?



Options

EndNote – Export References from Scopus

Unfortunately, with the direct export from Scopus no check for duplicates is conducted. To enable this option you have to export the selected references to a textfile named 'scopus.ris' after pushing the 'Export' (see previous slide) button (the detailed procedure might depend on the operating system and web browser).

Choose 'Reference Manager (RIS)' as *Import Option* in Endnote.

EndNote – Export References from various databases

Also from Ovid a direct export (again without check for duplicates) and an export via textfile exist. The latter option is the standard for most databases, such as e.g. PubMed.

The principle is always the same: marking records, perhaps collecting them in a basket or marked list within the database, export to textfile, and import of this to EndNote. Crucial is the right choice of *Import Option* (corresponding to the database from where the references were exported) when importing to EndNote.

Export References from [ETH Library @ swisscovery](#)

References can either be exported one-by-one (use 'RIS Export') or several at once by using the Favorites:

BOOK
Nanowires and nanobelts : materials, properties and devices
Zhong Lin Wang
2003
Available in an ETH Zurich library >

TOP
REQUEST
DETAILS
LINKS
SEND TO

Request

Please sign in to see request options and to place requests. [Sign in](#)

LOCATION ITEMS
ETH-Bibliothek
Available

Export References from [ETH Library @ swisscovery](#)

In the E-Shelf (see upper right corner in Search Portal) select references, choose 'RIS Export', and save file 'Primo_RIS_Export.ris' on your harddisk:

Send to

PERMALINK
E-MAIL
CITATION
PRINT
EXPORT BIBTEX
EXPORT RIS
ENDNOTE
MENDELEY
EXPORT TO EXCEL

In EndNote use the *Import* function and choose 'Reference Manager (RIS)' as *Import Option*.

EndNote – Output Styles

Output styles define in varying degrees of detail the format of the references in the text and of the bibliography (list of references), and optionally also of footnotes (where these are used in the text).

Via *Tools / Output Style Manager* many journal templates are available.

Existing styles can be altered and new styles can be created, either from scratch or by opening an existing style using the *Edit* command, and *Save as* (*File* menu) with a different name (and changing it afterwards). Many styles are available online (<http://endnote.com/downloads/styles>); after downloading they have to be placed in the *Styles* folder within the EndNote 20 folder.

EndNote – Term Lists

Term Lists (see *Library* menu) are each associated with a field entry in the *Reference Window*. *Term Lists* help improve the consistency of manual data entries by suggesting terms from the corresponding list while you type.

The *Journals Term List* is used to store abbreviations of journal titles, which can then be referenced in *Output Styles*, e.g. according to the requirements of a journal (see next slide).

EndNote – Using (Journal) Abbreviations

Definition of abbreviation in *Journals Term List*

Full Journal:
Agriculture, Ecosystems & Environment

Abbreviation 1:

Abbreviation 2:

Abbreviation 3:

OK Cancel

Choosing abbreviation in selected *Output Style*

EndNote X9 - [APA 6th]

File Edit References Groups Tools Window Help

Plain Font Plain Size B I U P A¹ A₁ Σ

About this Style
Punctuation
Anonymous Works
Page Numbers
Journal Names
Sections
Citations
Templates
Ambiguous Citations
Author Lists
Author Name
Numbering
Sort Order

Journal Name Format

Use full journal name

Abbreviation 1

Abbreviation 2

Abbreviation 3

Don't replace

Abbreviate journal articles only

Remove periods

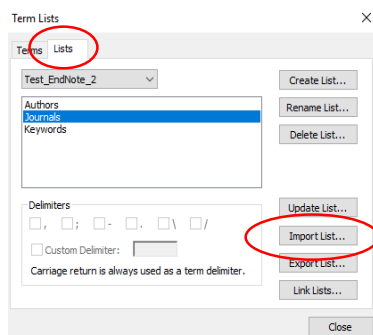
EndNote – Term Lists

Three empty term lists for authors, journals and keywords are available by default with every library. These lists are already linked to their corresponding fields.

New lists can be created (*Library / Define Term Lists / Create List* button), and new entries can be added to an existing list (*Library / Open Term Lists / list name, New Term* button), e.g. for adding a new journal and its abbreviation to the *Journals Term List*.

EndNote – Journals Term List

In order to import existing term lists for journals, first open the menu *Library / Open Term Lists / Journals Term Lists* and then click on the *Lists* tab.



Use the option *Import List* to import e.g. the list *Chemical.txt* from the following folder:
C:\Programme\EndNote
20\Terms Lists

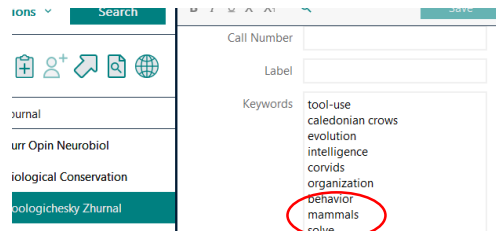
EndNote – Groups

An Endnote library might be split into subsets of references by defining *Groups* or *Smart Groups* (the latter are populated automatically). Note that references might also be 'grouped' by defining keywords (*Term List*!) for each of them. See *Groups* menu for the *Hide Groups* option.

Besides the customized groups also such exist that document the status of certain actions, e.g. import, online search, or all references cited in a certain document. Entries from different groups can be combined using Boolean operators.

EndNote – Keywords

Adding keywords
to references:



Retrieving/searching references by keywords:



EndNote – Find Full Text

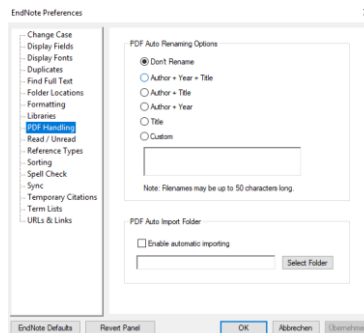
A file can be attached to a reference via the *References* menu and the *File Attachments* option (or use right mouse click).

When reference entries in EndNote contain the DOI or similar information EndNote can download the PDF files automatically by using the *Find Full Text* option. A subscription to the journal by ETH and a connection to the ETH domain are required.

EndNote – Find Full Text

Automatically downloaded PDF's are stored in the 'PDF' folder within the corresponding EndNote library folder.

In the *Preferences* different options are available for automatically renaming imported PDFs.



EndNote – Find Full Text

With CWYW you can access EndNote from within Microsoft Word to insert citations (and also images) into your Word document.

EndNote automatically builds a bibliography of the inserted citations and adds this to the Word document.

The format of the citations and the bibliography is defined by the corresponding *Output Style*.

EndNote – CWYW: inserting citations

In order to insert a citation, first use the *Find citation* option to identify the reference(s) to be inserted. To identify a reference, search terms from any field of the EndNote library can be used. Select the appropriate reference(s) and use the *Insert* option to introduce them into your text.

References that have already been cited can be edited from Word.

EndNote – CWYW: formatting citations

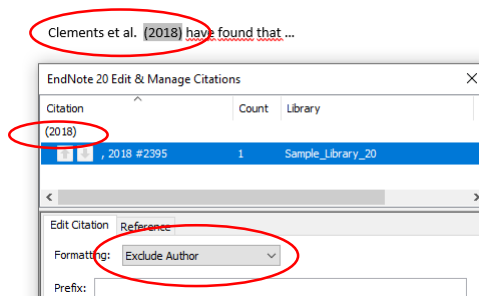
By default, EndNote formats the citations in the formatting style that is currently in effect (“instant formatting”) and also generates a corresponding bibliography automatically. Instant formatting can be turned off in the CWYW preferences.

To change the formatting, the *Output Style* has to be changed in the EndNote toolbar in Word.

Citations can also be formatted individually.

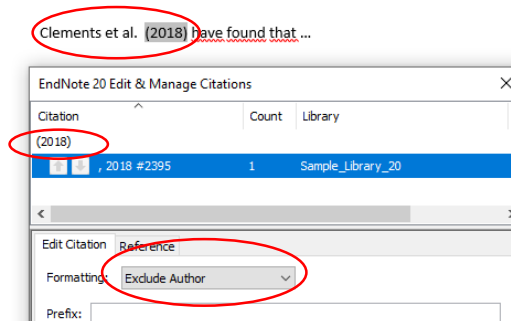
EndNote – CWYW: formatting citations

If the chosen *Output Style* uses as a default e.g. parenthesis around the citations, you can change this for individual citations by using the *Edit Citation(s)* option, selecting a reference ...



EndNote – CWYW: formatting citations

... checking the *Exclude author* option, and typing the author name (here: 'Clements' plus 'et al.') as plain text. The grey background behind the year indicates that this is still a fully linked reference.



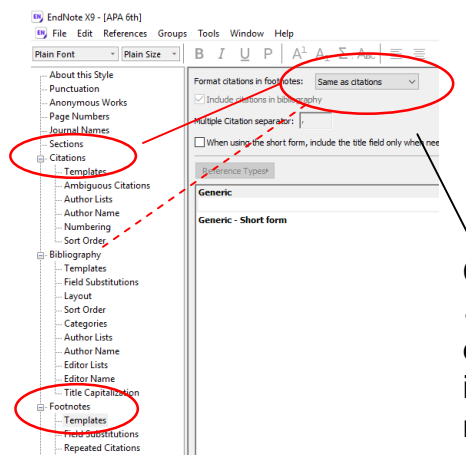
Citations in footnotes

When citations are to be placed into footnotes in Word, a footnote has to be created first.

Then the citations are inserted into the footnote as they are entered into the text.

Two basic options exist for formatting citations in footnotes: 'Same as citations' or 'Same as bibliography'. This choice has to be made by editing the *Footnotes / Templates* menu in the selected Output Style (see next slide using Author-Date style as an example). Repeated citations can be done in an abbreviated form.

Citations in footnotes



Choose either *Same as citations* or *Same as bibliography*. The detailed definition of the format is then defined in either the *Citations* or *Bibliography* menu.

New Citation Styles from X7 on

In version X7 new citation styles were introduced that allow to sort references according to defined categories. This feature is particularly helpful for CVs; in Microsoft Word select the style APA 6th CV to obtain an impression of the corresponding capabilities; consult the definition of the style to learn how to create own categories for another style.

Also topical categories can be added to which the references are assigned manually (see *Categorize References* in the EndNote 20 toolbar in Word).

Sharing references

References from EndNote libraries can be shared with other people via EndNote Web. Everybody involved in the sharing process needs an EndNote Web account which can be synchronised with an EndNote desktop library.

In order to share references the corresponding E-mail addresses have to be specified for the groups of references to be shared.

EndNote Click Browser Extension

EndNote Click (formerly Kopernio) identifies available full text PDFs that are either open access or subscribed by your institution.

References
Show full outline ▾

Figures (15)

Show all figures ▾

View PDF EN

Table 1

+ Add to Mendeley
<https://doi.org/10.1016/>

Abstract
The simulated mc as a convenient te separation of fine performances with competitive adsor achieve high sepa to be the major pr is solved in this p criteria for the ch prescribed separ Langmuir isother space of the onera

EndNote Click Browser Extension

The PDF found by EndNote Click can be transferred together with the reference itself to EndNote.

For more information on EndNote Click see [here](#).

JOURNAL OF CHROMATOGRAPHY A

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Morbidelli^{1,*}
7, 20121 Milan, Italy
1, Piazza d'Armi, 09123 Cagliari, Italy
trasse 6, CH-8092 Zurich, Switzerland

M. Mazzotti, G. Storti, M. Morbidelli
Journal of Chromatography A (1997)

Remove from Locker?

Download PDF

Share PDF

Export to EndNote

Push to EndNote account

Visit journal page

Get citation

Manage tags

Web of Science record

Personal recommendations

Conduct the literature search in the database itself (at least for topical or advanced searches).

Import only selected references to your citation database.

Add your own keywords to each reference.

Double-check that the selected output style meets the requirements of the journal in question.

References, Tutorials & Support

- Technical Support & Services at endnote.com [link](#)
- Downloads at endnote.com [link](#)
- EndNote Product Training at endnote.com [link](#)

Questions?

Thank you very much for your attention!

Do you have any questions?

Contact details

Dr. Ulrich Fischer
ETH-Bibliothek
WEL B 1
8092 Zürich
Tel.: +41 44 632 56 68
ulrich.fischer@library.ethz.ch

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