



Universität
Basel

Universitätsbibliothek

Introduction to EndNote 21

Monika Wechsler

FS 2024



Agenda Full Course

1. Quick Start and Exercise

1. Getting started
 - Install EndNote; Create an EndNote-Library
2. Search and collect references
 - With PubMed (PC; Mac)
 - With google scholar
 - With PubMed, within EndNote
3. Insert references into a Word document (CWYW)
4. Exercise: Collect references in PubMed and google scholar and insert them from EndNote into your wordtext

2. More Details

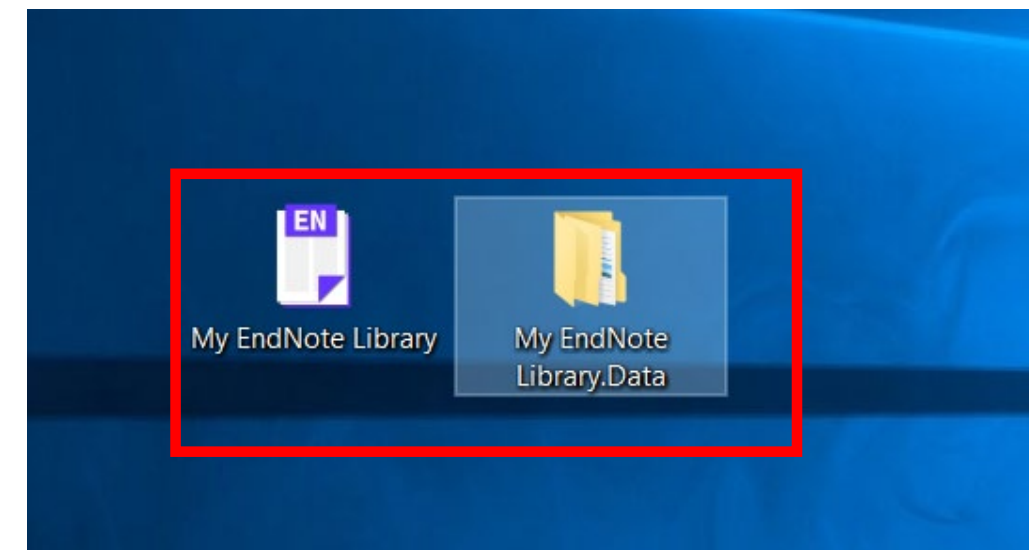
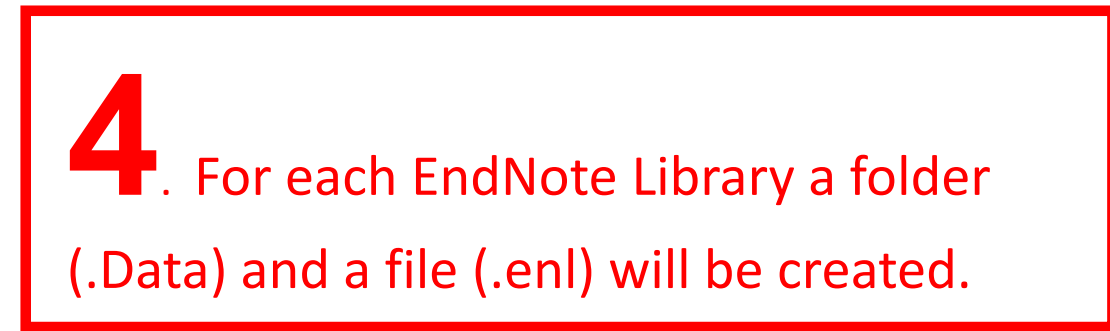
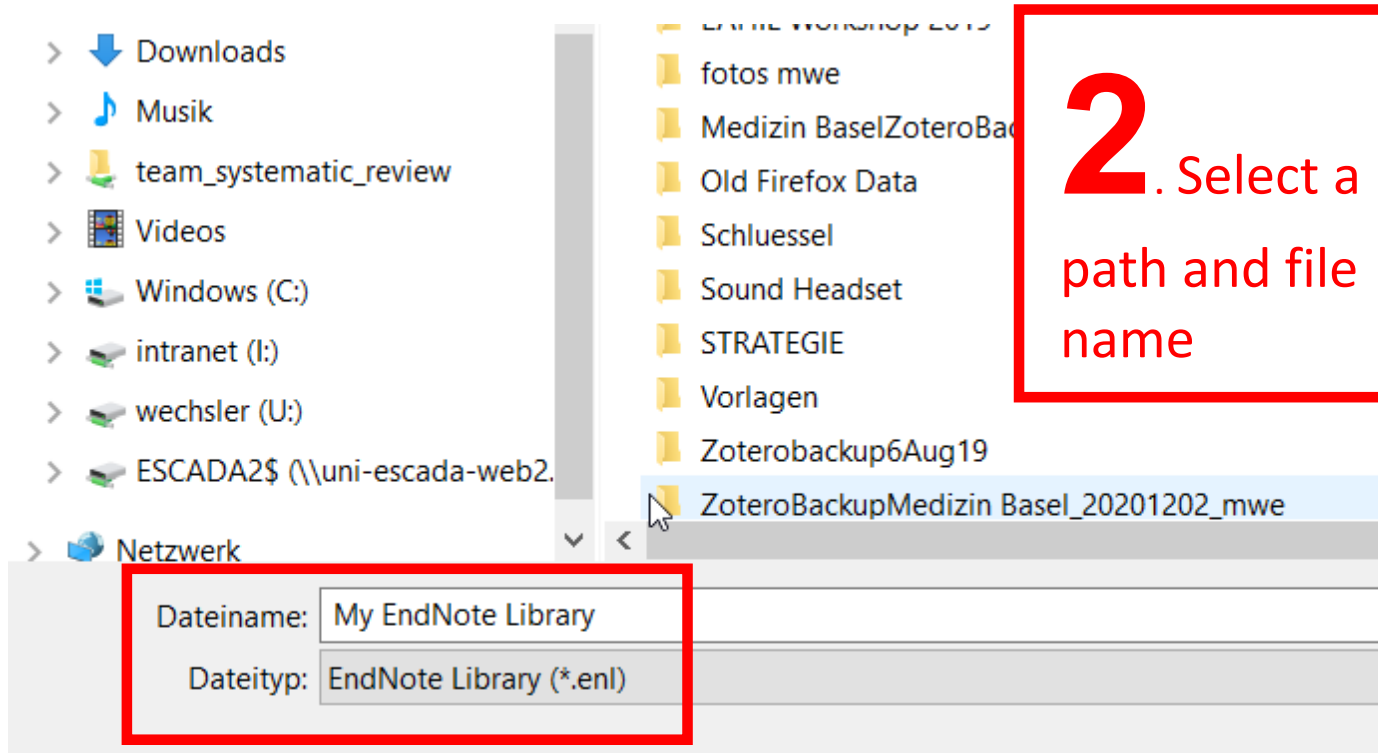
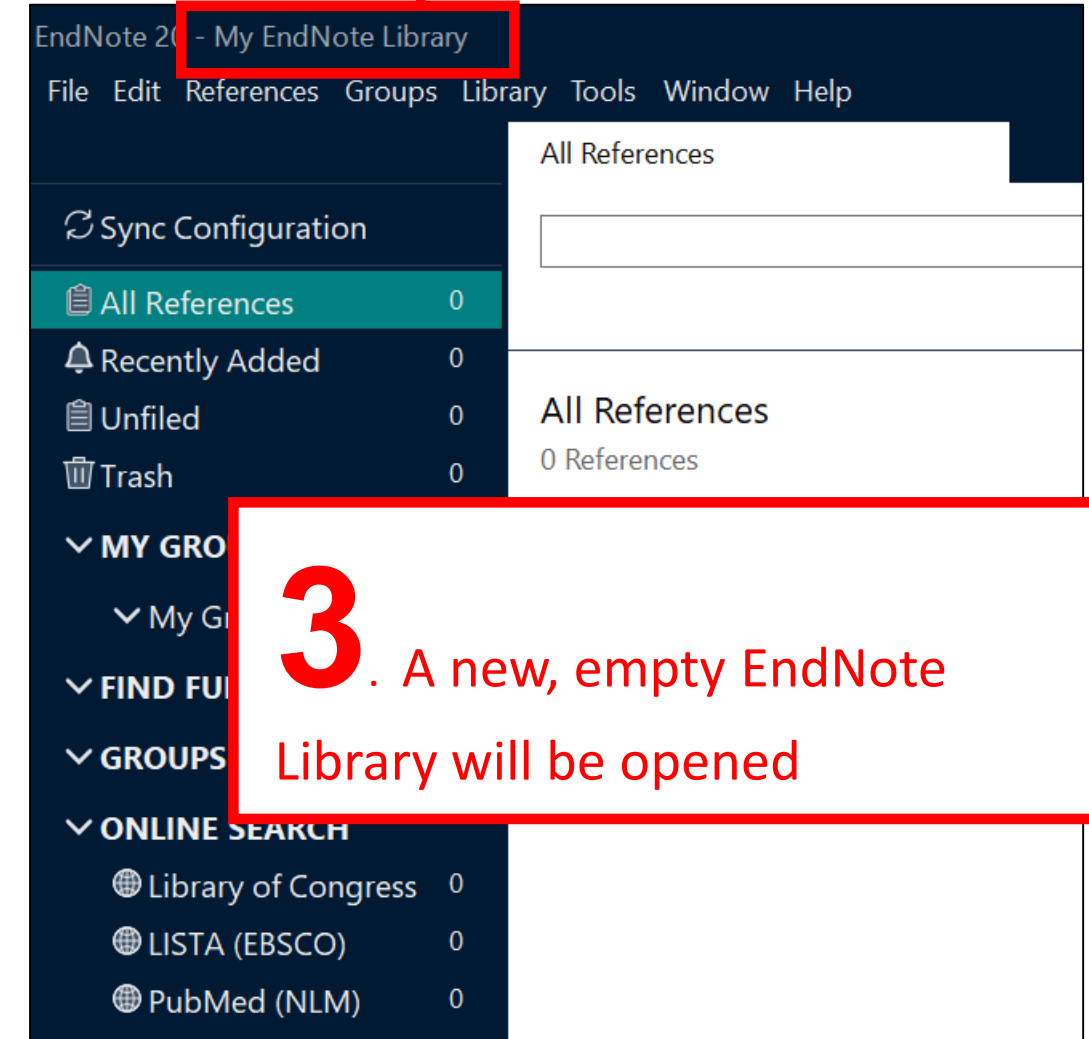
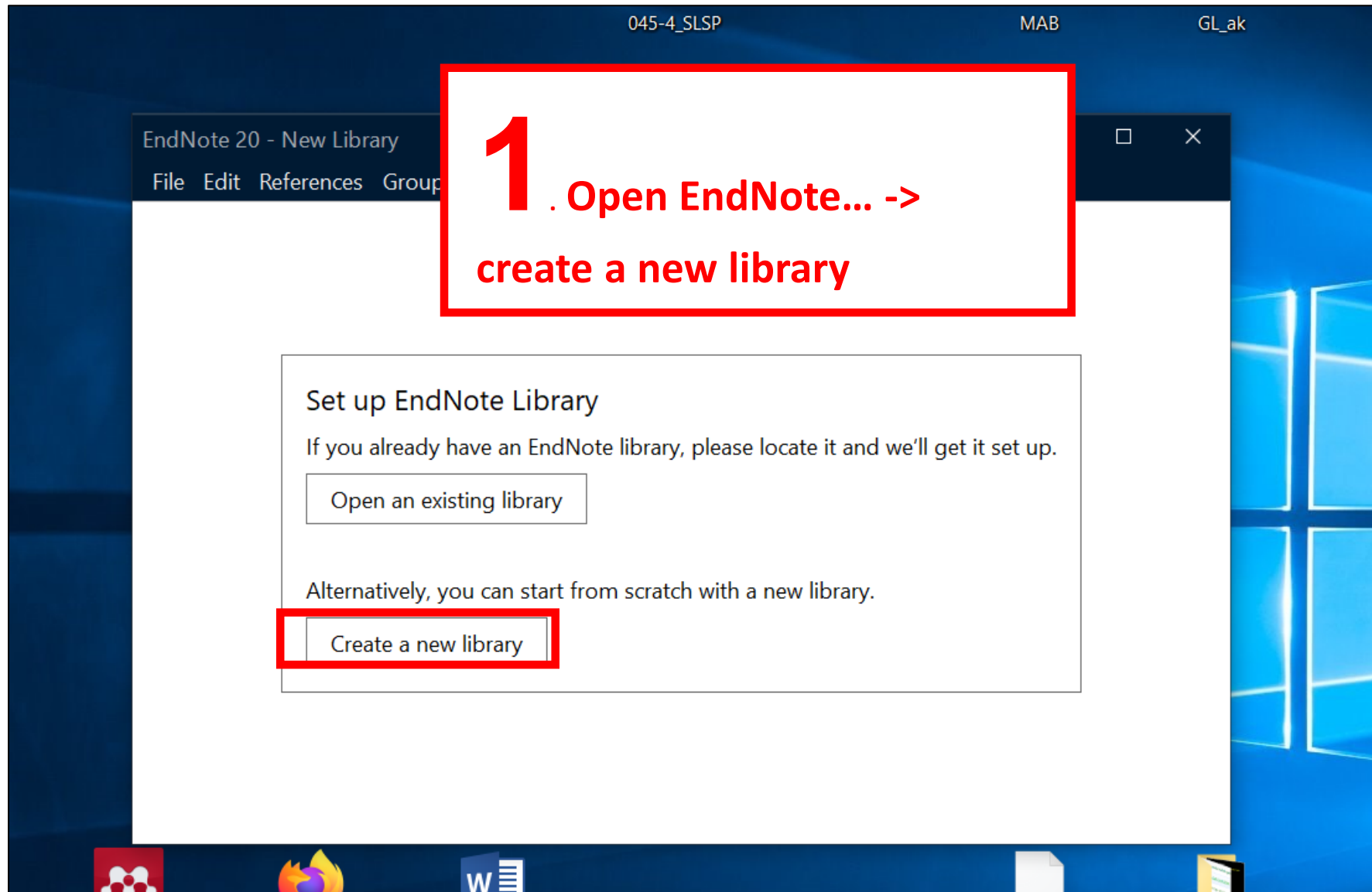
2. Search and collect references
 - With library catalogue swisscovery Basel
 - Create a reference from a PDF stored on your computer
 - Create a reference manually
3. Insert references into a Word document (CWYW)
 - Citation Styles / Journal Term Lists
4. Manage references in EndNote
 - Groups / Edit references / remove duplicates
 - Search for fulltext articles (PDFs); administer PDFs
5. EndNote web account
6. Library sharing incl. PDFs
7. FAQs

Using EndNote with Google Docs ; Bibliography list after each chapter; Combining multiple word documents; add references from a PDF/word to EndNote, tagging references....

1.1. Getting started: Install EndNote (desktop version)

- **Campus license**
Students Uni Basel: via <https://asknet.unibas.ch>: 10.-/year;
Employees Uni Basel via IT-Department
- **Free trial version**
(30 days) <https://www.endnote.com/> -> *LOGIN*
- **System requirements**
Windows 10, macOS 10.14 or 10.15
MS Word, Apache OO, Libre Office, MS Word MacOS, Apple Pages
Firefox, IE, Safari, Chrome
Details: (<https://endnote.com/product-details/compatibility/>)

1.1. Getting started: Create a new EndNote Library



1.1. Getting started: opening EndNote with Mac (EndNote 20)

<https://communities.apple.com/de/thread/252595385>:

“As you have just purchased and installed EndNote 20 in your Mac computer (first time for this computer presumably), you would have to create an EndNote library first in order to be able to see and use the EndNote 20 program.

Please follow these steps:

1. Click on the EndNote 20 application icon in your dock/tray.
2. Click on the "File" menu at the top left of your screen. (You will notice it now says "EndNote 20").
3. After clicking "File" > Click "New" to create your EndNote library.
4. A window will be prompted for you to name your EndNote library and save it in a location. (You may save the library in the "Documents" folder or in your "Desktop") (It is recommended that the library is saved in your local drive).
5. After you have created and saved your library, the EndNote 20 program will be ready for you to use.”

1.2. Search and collect references: PubMed

NIH National Library of Medicine National Center for Biotechnology Information

PubMed.gov

malaria tannin

Advanced Create RSS

2.

3.

1.

4.

5.

317 results

Clipboard

My Bibliography

Collections

Citation manager

Clipboard

pubmed-30226337.nbib

which is: NBIB file

from: pubmed.ncbi.nlm.nih.gov

What should Firefox do with this file?

Open with EndNote 21.2 (Bid 17387)

Save File

Do this automatically for files like this from now on.

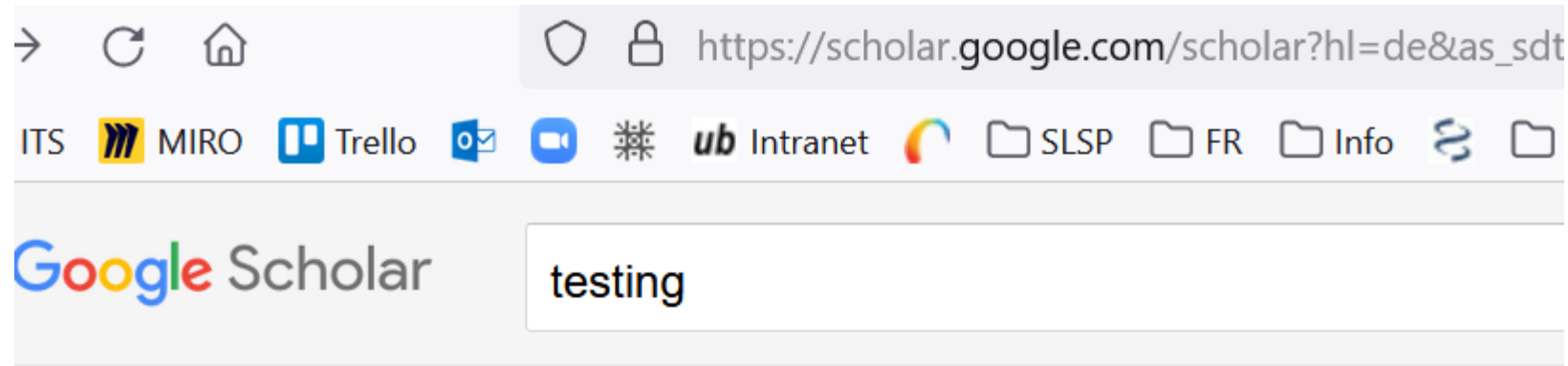
OK Cancel

Imported References

Author	Title	Journal	Year
Adhicary, ...	Malaria in Infants	Ind Med Gaz	1944
Langmea...	Malaria in an Infant	Proc R Soc ...	1914
Lopatin, G...	On the sudden death of children in ...	Pediatriia	1945

The imported references in EndNote

1.2. Search and collect references: google scholar



Artikel Ungefähr 6'760'000 Ergebnisse (0.10 Sek.)

- Beliebige Zeit
- Seit 2022
- Seit 2021
- Seit 2018
- Zeitraum wählen...

- Nach Relevanz sortieren
- Nach Datum sortieren

- Beliebige Sprache
- Seiten auf Deutsch

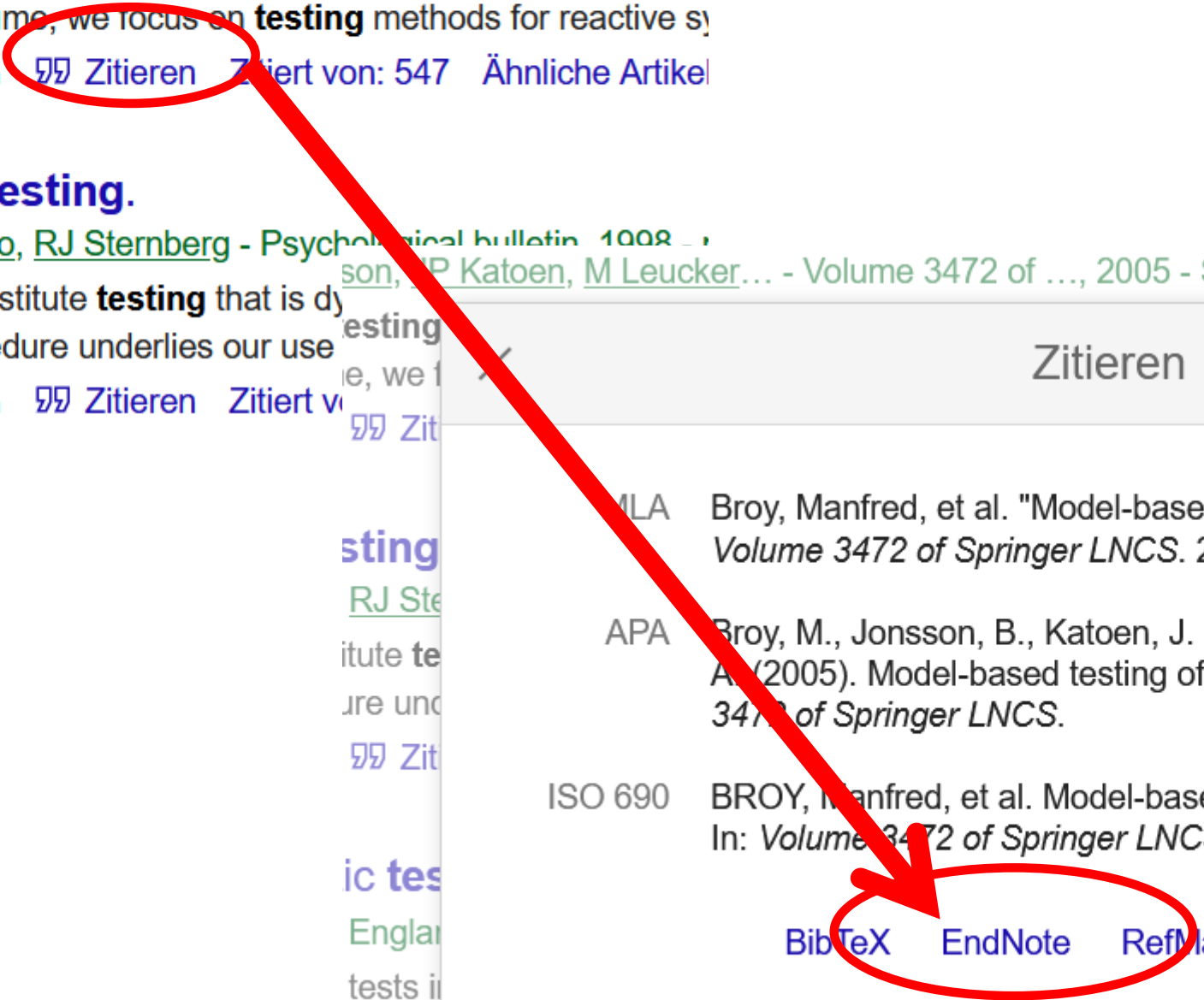
Model-based testing of reactive systems
M Broy, B Jonsson, JP Katoen, M Leucker... - Volume 3472 of ...
... , a book on **testing** is hardly ever a comprehensive overview
... In this volume, we focus on **testing** methods for reactive systems
☆ Speichern **Zitieren** Zitiert von: 547 Ähnliche Artikel

Dynamic testing.
EL Grigorenko, RJ Sternberg - Psychological bulletin, 1998 ...
... and to substitute **testing** that is dynamic
testing procedure underlies our use
☆ Speichern **Zitieren** Zitiert von: ...

Zitieren

MLA	Broy, Manfred, et al. "Model-based testing of reactive systems." <i>Volume 3472 of Springer LNCS</i> . 2005.
APA	Broy, M., Jonsson, B., Katoen, J. P., Leucker, M., & Pretschner, A. (2005). Model-based testing of reactive systems. In <i>Volume 3472 of Springer LNCS</i> .
ISO 690	BROY, Manfred, et al. Model-based testing of reactive systems. In: <i>Volume 3472 of Springer LNCS</i> . 2005.

BibTeX EndNote RefMan RefWorks



1.2. Search and collect references: with PubMed within EndNote

The screenshot shows the EndNote interface with the PubMed (NLM) search window open. The search criteria are: Author (Smith, A.B.) Contains tanner, And Year Contains, and And Title Contains malaria infants. The search results table is as follows:

<input type="checkbox"/>	<input type="checkbox"/>	Author	Title	Journal
<input type="checkbox"/>	<input type="checkbox"/>	Otieno, L;...	Safety and immunogenicity of the ...	Vaccine
<input type="checkbox"/>	<input type="checkbox"/>	Guerra M...	Safety profile of the RTS,S/AS01 ma...	Hum Vacci...
<input type="checkbox"/>	<input type="checkbox"/>	Jongo, S. ...	Safety and Differential Antibody an...	Am J Trop ...
<input type="checkbox"/>	<input type="checkbox"/>	Ajua, A.; L...	The effect of immunization schedul...	Malar J
<input type="checkbox"/>	<input type="checkbox"/>	Abdulla, S...	Randomized, controlled trial of the l...	Malar J

2. Search fields PubMed

3 Search results PubMed


4 Select results for your EndNote Library

1 Search within PubMed

This close-up shows the search results table with three rows selected (highlighted in teal). A red arrow points to the plus icon in the top right corner of the results table, which is used to add selected records to the local library.

<input checked="" type="checkbox"/>	<input type="checkbox"/>	Otieno, L;...	Safety and immunogenicity of the ...	Vaccine
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Guerra M...	Safety profile of the RTS,S/AS01 ma...	Hum Vacci...
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Jongo, S. ...	Safety and Differential Antibody an...	Am J Trop ...

1.3. Insert references into a Word document: View in Word

Go to EndNote: mark wished reference in EndNote, click in EndNote  (or command ALT+2)-> reference will be inserted into Word; alternatively choose *Insert Citation*

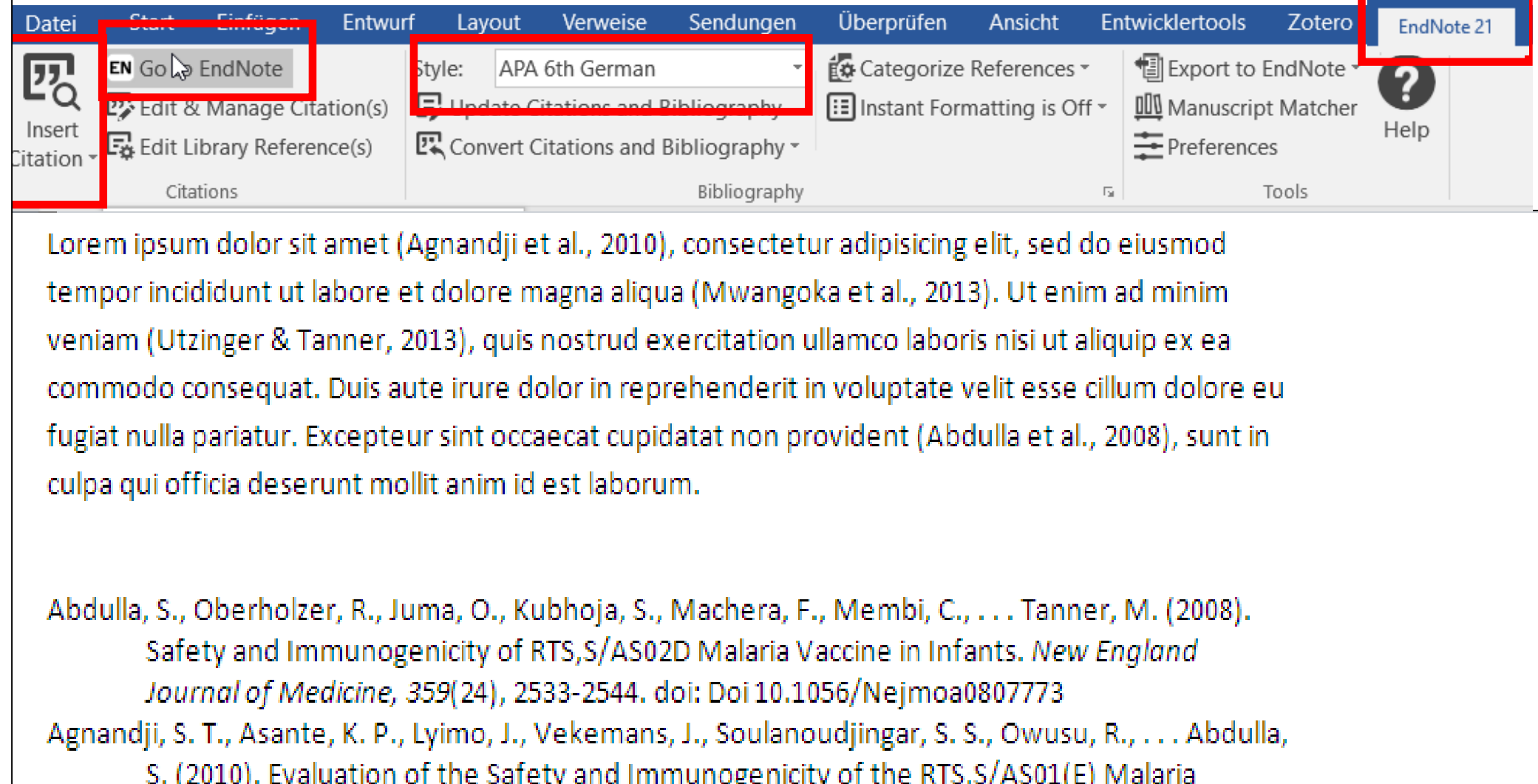
Insert Citation: search with a keyword within your EndNote Library and click on «insert»

Style: Define format of in-text citation and of reference within the bibliography. Suitable for medicine: Vancouver, APA7th

Edit & Manage Citation: Edit text within in-text citation (e.g. insert page numbers; omit author etc)

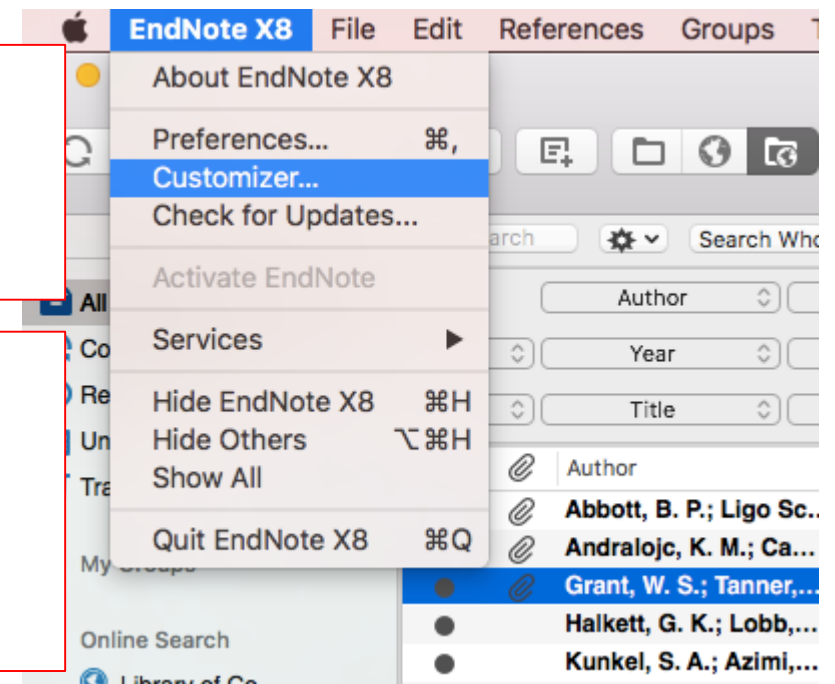
Convert Citations: *Convert to unformatted Citations:* remove codes temporarily (e.g. for loading faster);
Convert to plain text: remove codes irretrievably.
Warning: Save document previously!

EndNote toolbar of MS Word



Mac: if EndNote toolbar is missing: EndNote -> Customizer ... -> Cite While You Write addin ...

Mac / Mojave: System Preferences -> Security & Privacy -> Privacy -> Automation options: make sure that both "Microsoft Word" and "EndNote " are both turned on.



1.4. Exercise

2.2. Search and collect references: Library catalogue (swisscovery Basel)

BUCH
Ethics, medicine, and information technology : intelligent machines and the transformation of health care
Kenneth W. Goodman (Professor and Director, University of Miami Miller School of Medicine Institute for bioethics and Health Policy, Miami, FL, USA)
Cambridge UK : Cambridge University Press
2015

Verfügbar bei Basel - UB Medizin Freihandbereich (UBM Med W 26.5-7) >

Senden an

Permalink E-Mail Zitieren Drucken **RIS** BibTeX EndNote Excel

Codierung
UTF-8

2. Download

Opening Primo_RIS_Export.ris

You have chosen to open:

3. Primo_RIS_Export.ris
which is: Text Document (293 bytes)
from: basel.swisscovery.org

What should Firefox do with this file?

Open with EndNote 21.2 (Bld 17387)

Save File

Do this automatically for files like this from now on.

OK Cancel

2.2. Search and collect references: with library catalogue swisscovery within EndNote: Connection File swisscovery Basel

Download EndNote-Connection file for swisscovery Basel:

https://endnote.com/connections_download/university-of-basel/

EndNote™

Download all

Get Started

- Buy EndNote
- Learn More
- Request a trial

← Back to Connections

University of Basel

Connections Database: Library Catalog

Connections Date: Thursday, July 15, 2021

Connections Catalog Type: Library Catalog

Connections File Name: U Basel.enz

1.

Download Connection

U Basel

File Edit Tools Window Help

4.

About This Connection

Connection Settings

Search Attributes

Templates

Author Parsing

Continuation Lines

Default Reference

Editor Parsing

Field Editing

MARC Records

Record Layout

Source Parsing

File Name: U Basel

Based on: ALMA

Category: Library Catalog

Created: Dienstag, 19. Oktober 2021, 11:24:09

Save As

Connection name: U Basel

Save

Cancel

1. «Downolad Connection»
2. Save it on your desktop
3. Double click it on your desktop
4. Save it as...U Basel -> Save (and close the file)

GROUPS SHARED BY ...

ONLINE SEARCH

- Library of Congress 0
- LISTA (EBSCO) 0
- PubMed (NLM) 0
- swisscovery-abi 0
- swisscoveryBasel-... 0
- Web of Science C... 0

more...

Sripa, Banc... 2012

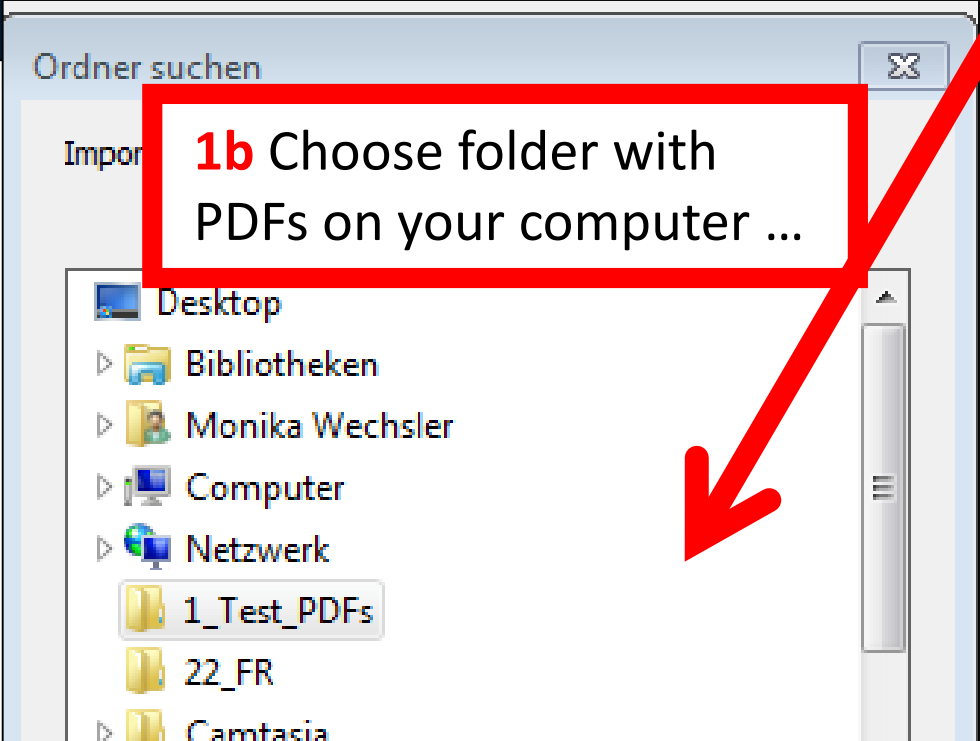
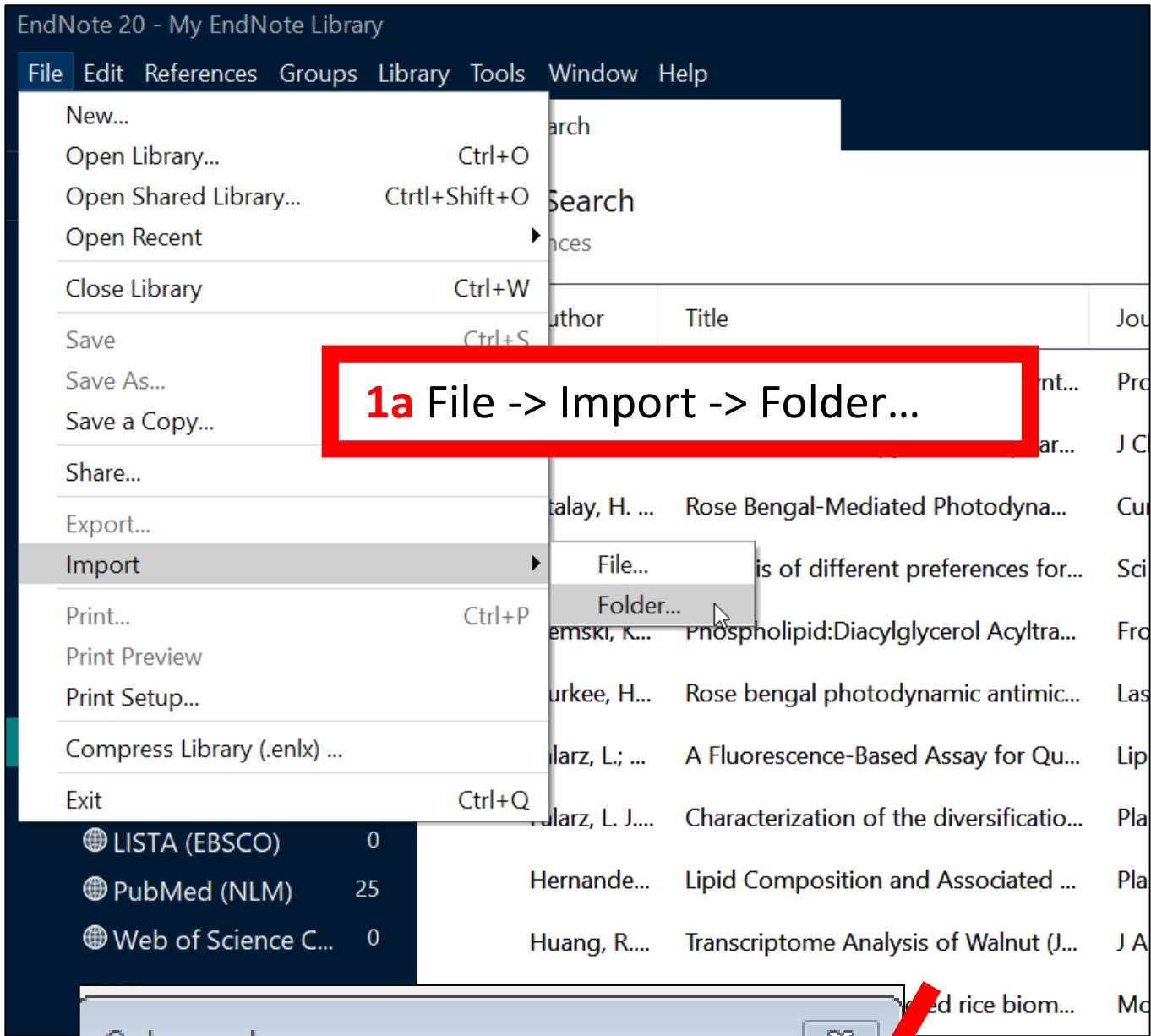
Choose A Connection

Name
U Aberdeen
U Adelaide
U Akron
U Alabama-Birmingham
U Alaska-Fairbanks
U Alberta
U Arizona
U Auckland
U Auto de Barcelona
U Autonoma de Madrid
U Barcelona
U Basel

5.

5. Next time when you open EndNote, the file «U Basel» will be available

2.2. Search and collect references: Create a reference from a PDF



2a

	Author	Title	Journal	Year
	Tam, John...	Research agenda for mass gatherin...	The Lancet ...	2012
	Chan, K.; ...	A Rapid and Low-Cost PCR Thermal...	PLoS One	2016

2b

	Author	Title	Journal	Year
		<1-s2.0-S014929189980006X-mai...		
		<1113.full.pdf>		

2a Metadata of the article will be completed automatically in EndNote

2b No metadata available: see next slide

2.2. Search and collect references: Create a reference from a PDF

1. What to do if metadata of your imported PDF is missing?

The screenshot shows a table of imported references with columns for Author, Title, Journal, and Year. One row is highlighted in green. To the right, a detailed view of a reference is shown with fields for 'Priorität', 'Accession Number' (containing '32218802'), and 'Call Number'. The 'Edit' button in the top right of this view is circled in red.

2. If the document has an ID, fill it out in the following field:

- Accession Number: PubMed ID
- PMCID: PubMed Central ID
- DOI
- ISBN...

then save the reference

3. Mark the record, right mouse click: Find Reference Updates

The screenshot shows the same table of references. A right-click context menu is open over the highlighted row, with the 'Find Reference Updates' option at the bottom highlighted in blue.

If not possible:

- either delete the record, download the reference from google scholar/PubMed... & attach the PDF from your computer by hand
- Or fill out the missing metadata by hand

2.2. Search and collect references: Create a reference manually

File Edit References Groups Library Tools Window Help

All References

Advanced search

All References
30 References

New Reference (My EndNote Library)

File Edit References Groups Library Tools Window Help

Reference Type Web Page

Author

Year

Title

Series Editor

Save

Create a new reference manually

Choose correct reference type

Cataloguing Authors:

Persons:

Family name, first name *or*
Family, V.

Organisations:

Name of the Organisation,

Check always the output:
Summary

All References

Advanced search

All References
31 References

Organization, 2021 #36 Summary Edit

+ Attach file

APA 6th Copy citation

Organization, W. H. (2021). The Burden of Malaria. Retrieved 10.2.2021, 2021, Retrieved from www.who.org/malaria

Author	Title	Year
Lozano-Fernandez, J.; Tann...	A Cambrian-Ordovician ...	2020
World Health Organization	The Burden of Malaria	2021
Otieno, L.; Guerra Mendoz...	Safety and immunogeni...	2020

2.3. Insert references into a Word document: format the bibliography in Word

The screenshot displays the Microsoft Word interface with the EndNote X8 ribbon active. The ribbon includes tabs for Citations and Bibliography. The Citations tab contains options like 'Go to EndNote', 'Edit & Manage Citation(s)', and 'Edit Library Reference(s)'. The Bibliography tab includes 'Style: APA 6th', 'Update Citations and Bibliography', and 'Convert Citations and Bibliography'. A citation '(Romore et al., 2016)' is visible in the document text. Two dialog boxes are open: 'EndNote X8 Edit & Manage Citations' and 'EndNote X8 Configure Bibliography'. The 'Edit & Manage Citations' dialog shows a table with one citation entry: (Romore et al., 2016), with a count of 1 and located in 'My EndNote Library'. The 'Configure Bibliography' dialog is set to 'Format Bibliography' and shows settings for font (Calibri, size 11), bibliography title, start with bibliography number (1), first line indent (0.000 cm), line spacing (Single), hanging indent (1.270 cm), and space after (None). A red arrow points from the 'Edit & Manage Citation(s)' button to the 'Tools' dropdown menu in the 'Edit Citation' dialog, which is open to show 'Update Citations and Bibliography', 'Configure Bibliography', and 'Export Traveling Library' options.

Start Einfügen Entwurf Layout Verweise Sendungen Überprüfen Ansicht Entwicklertools Zotero EndNote X8 Citavi Was möchten Sie tun?

Go to EndNote
Edit & Manage Citation(s)
Edit Library Reference(s)

Style: APA 6th
Update Citations and Bibliography
Convert Citations and Bibliography

Categorize References
Instant Formatting is On

Export to EndNote
Preferences
Help

Citations Bibliography Tools

(Romore et al., 2016)

EndNote X8 Edit & Manage Citations

Citation	Count	Library
(Romore et al., 2016)		
Romore, 2016 #8	1	My EndNote Library

Edit Reference

Edit Citation Reference

Formatting: Default

Prefix:

Suffix:

Pages:

Tools

Update Citations and Bibliography
Configure Bibliography
Export Traveling Library

EndNote X8 Configure Bibliography

Format Bibliography Layout

Font: Calibri Size: 11

Bibliography title:

Start with bibliography number: 1

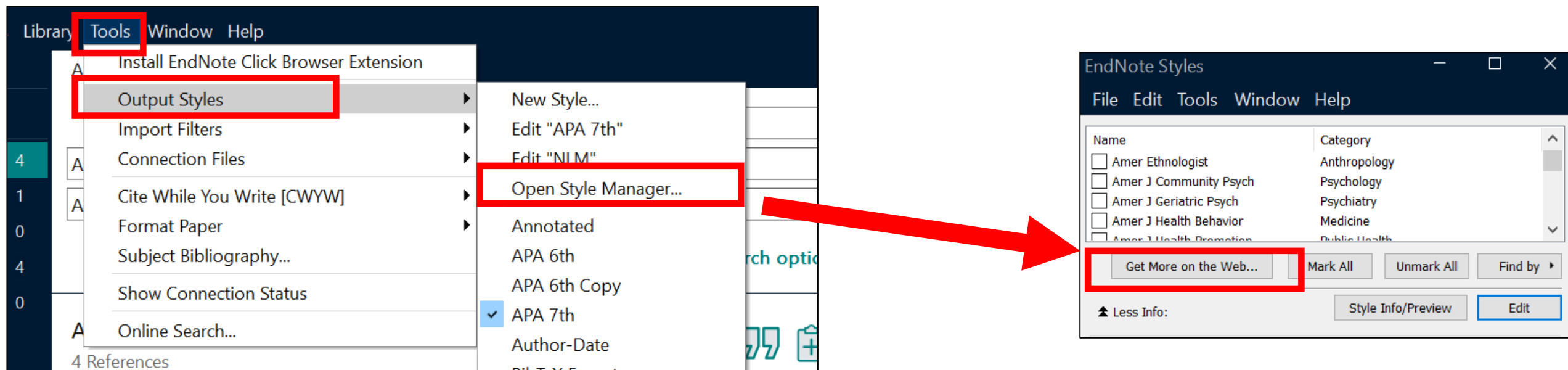
First line indent: 0.000 cm Line spacing: Single

Hanging indent: 1.270 cm Space after: None

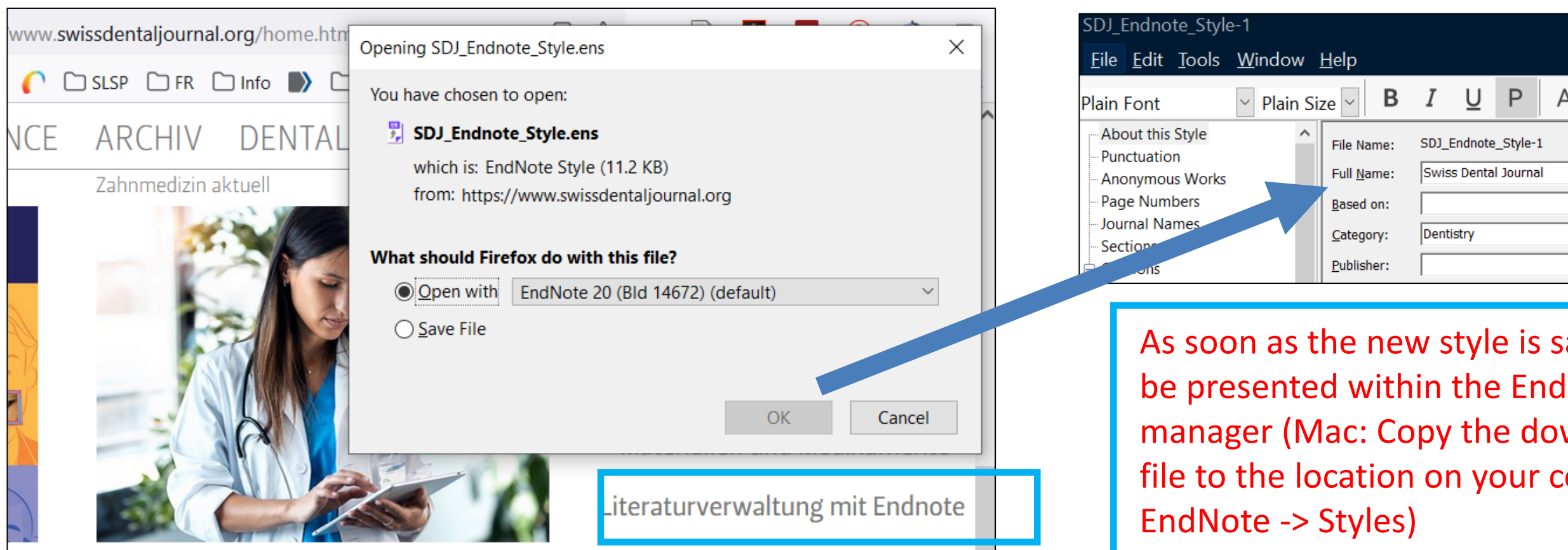
OK Abbrechen Hilfe

2.3. Insert references into a Word document: Import a missing style to Endnot

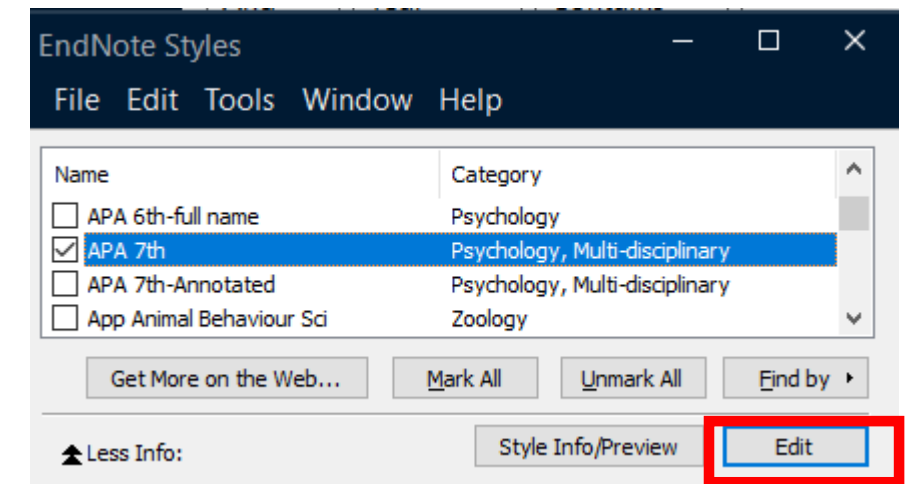
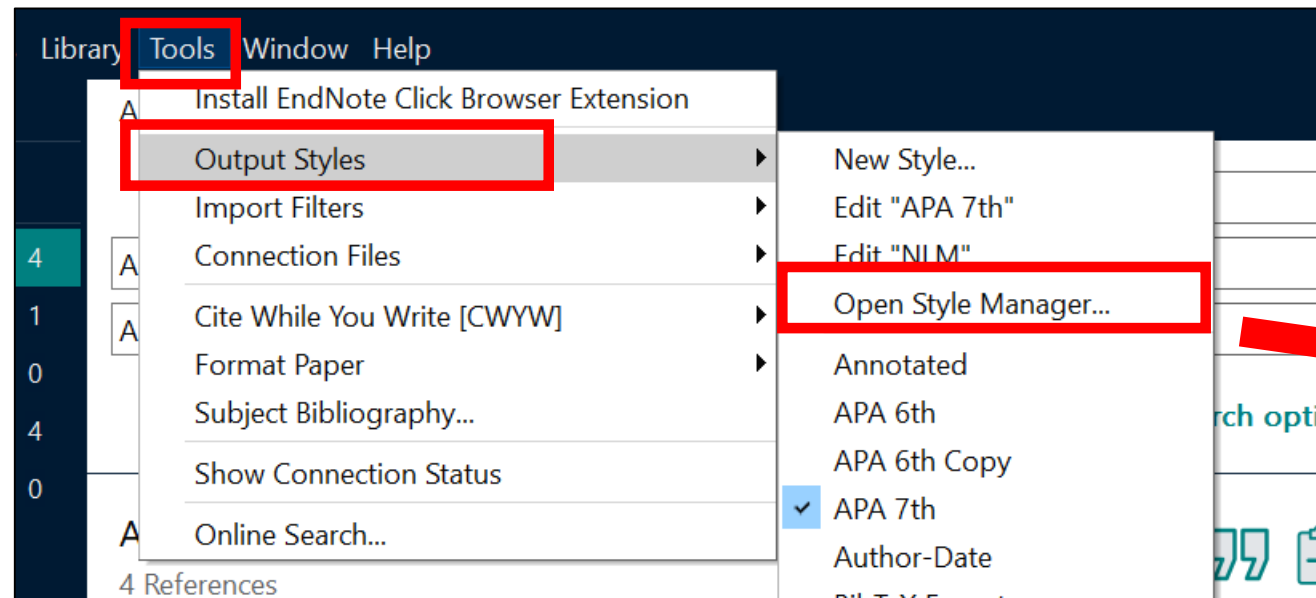
A: Import a style from the EndNote platform



B: Import a style from the publishers platform: e.g Swiss Dental Journal



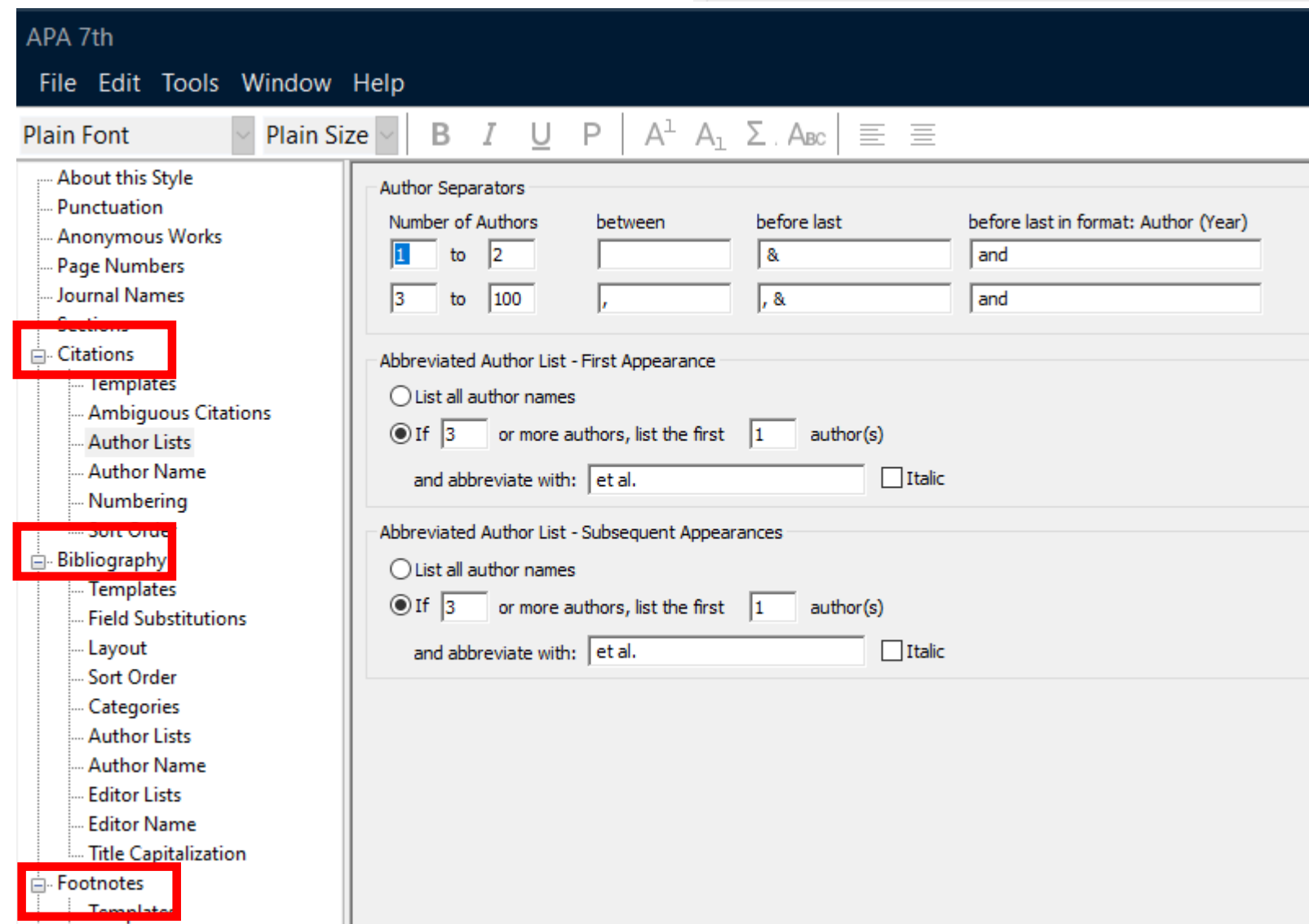
2.3. Insert references into a Word document: Edit an existing style in EndNote



Make adjustments

- to the in-text citation, such as the number of listed authors
- to the bibliography list (e.g. check templates)
- to the footnote citations if the chosen citation style allows footnotes

Save the modified style with a new name to preserve the original



2.3. Insert references into a Word document: term lists

EndNote defines term lists of authors and journal titles as soon as references are imported.

If different sources (e.g. PubMed and Web of Science) are used the term lists may be inconsistent. Therefore it is recommended to use standardized journal term lists -> Menu *Library/Open Term Lists/Journals/Lists/Import List...*

The screenshot shows the EndNote 20 interface. The 'Library' menu is open, and the path 'Open Term Lists > Journals Term List > Lists > Import List...' is highlighted with red arrows. A file explorer window shows the 'EndNote X8 > Terms Lists' folder containing various text files, with 'Medical.txt' selected. The 'Import List...' button in the 'Term Lists' dialog is also circled in red.

Already imported terms should be deleted before importing the standardized term list:

The 'Term Lists' dialog shows a table with 2 Journals in the Journals List:

Full Journal	Abbreviation 1	Abbrevia
Am J Trop Med Hyg		
Cad Saude Publica		

The 'Delete Term' button is circled in red.

2.4. Manage references in EndNote: Groups and Groupsets

My EndNote Library

File Edit References Groups Library Tools Window Help

Sync Configuration

All References 11

Dokument1 1

Recently Added 8

Unfiled

Trash

MY GROUPS

- Chapters
 - Introduction 4
 - Methodology 1
- Noch lesen
 - 1. Prio 1
 - 2. Prio 3

11 References

Author	Year	Custom 1	Title	Journal
Beavis, A.; ...	2021		Treatment of vulvar and vaginal dysplasia...	Int J Gynec...
Bhadury, ...	2021		Detection of Volatiles from Raw Beef Mea...	Foods
Burel, J. G.;...	2021		Distinct blood transcriptomic signature o...	Tuberculosi...
Campbell, ...	2021		Photoinduced Covalent Irreversible Inacti...	ACS Chem ...

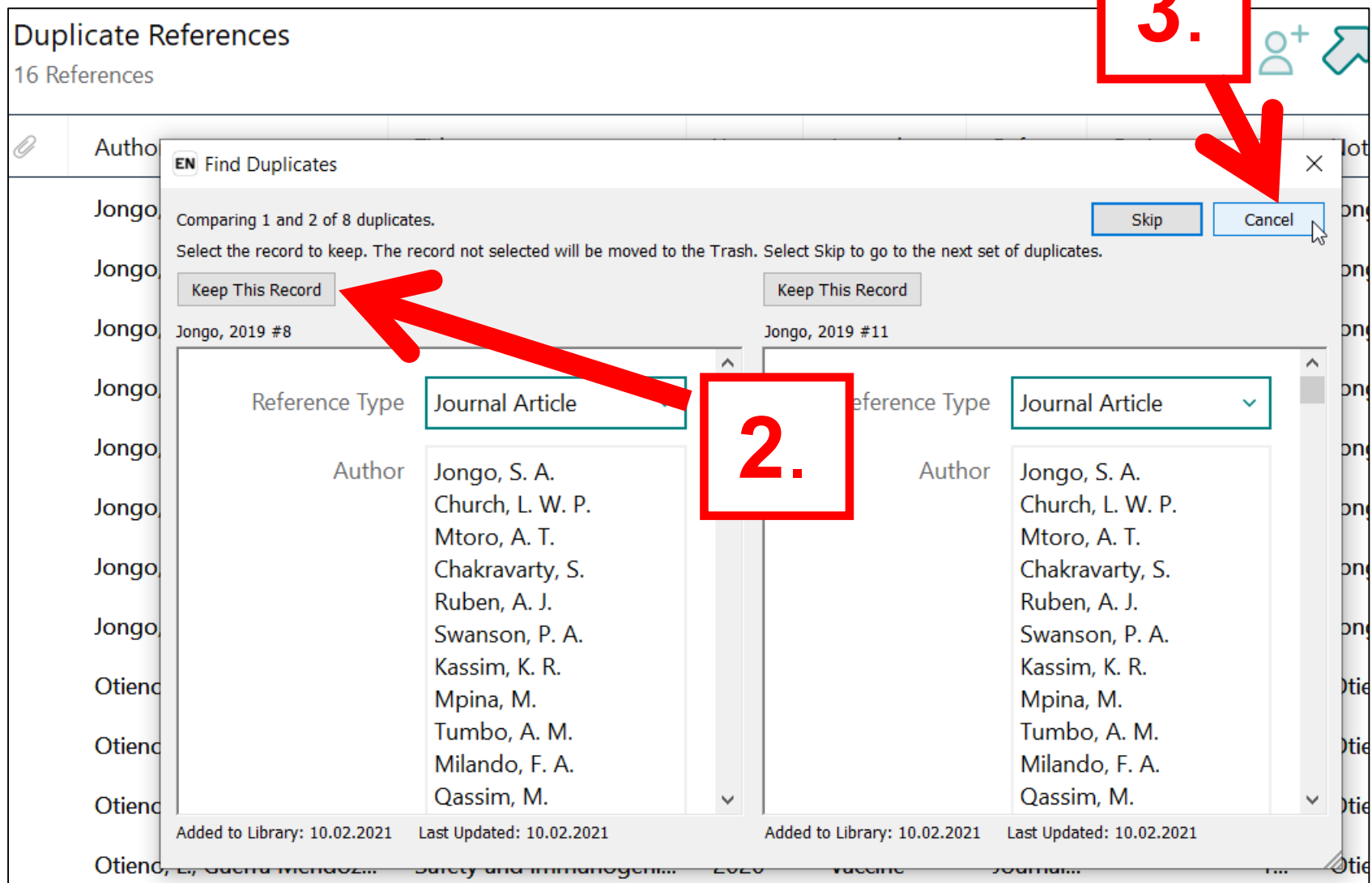
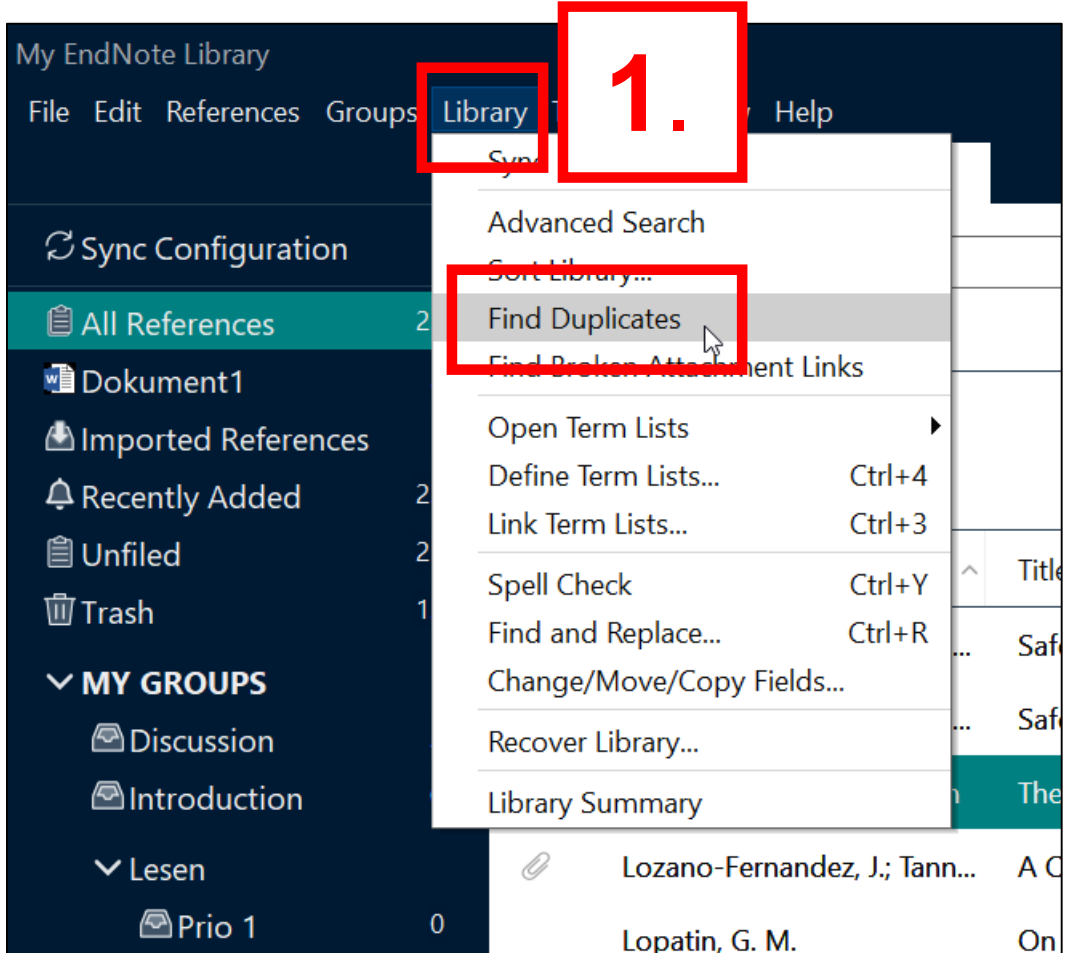
Move references to different groups (Drag & Drop or via menu «Groups»)

Group Set = Header of several groups

Introduction = a Group

Noch lesen = a Groupset

2.4. Manage references in EndNote: find and remove duplicates



- 1- Menu *Library* -> *Find Duplicates*
- 2- Duplicates will be shown and can be deleted individually
- 3- If you cancel this process...
- 4. ...all duplicates will be highlighted and can be moved to different groups/to the trash

A screenshot of the 'Duplicate References' table in EndNote. The table has 5 references. The second row is highlighted in green and labeled with a red '4.'. The table columns are Author, Title, Year, and Journal.

Author	Title	Year	Journal
Jongo, S. A.; Church, L. W. ...	Safety and Differential A...	2019	Am J Trop ...
Jongo, S. A.; Church, L. W. ...	Safety and Differential A...	2019	Am J Trop ...
Jongo, S. A.; Church, L. W. ...	Safety and Differential A...	2019	Am J Trop ...
Otieno, L.; Guerra Mendoz...	Safety and immunogeni...	2020	Vaccine
Otieno, L.; Guerra Mendoz...	Safety and immunogeni...	2020	Vaccine

If the EndNote plugin is not automatically offered for opening when exporting results from a database in the browser, the settings in the browser should be changed.

Firefox -> Settings -> General -> Files and Applications:

What should Firefox do with other files?

- Save files
- Ask whether to open or save files

Edge -> Settings -> Downloads:

Ask me what to do with each download



Always ask me if I want to save a file or open it without saving

Safari: Preferences -> General -> Downloads

2.4. Manage references in EndNote: search fulltexts/PDFs automatically

The screenshot shows the EndNote interface. At the top, there's a search criteria builder with three rows: 'Author' contains 'tanner', 'Year' is empty, and 'Title' is empty. Below this is a 'Search' button. The main area shows a list of 11 references. The first few are highlighted in green. A red circle highlights the 'Search the Web' icon (a magnifying glass over a document) in the toolbar. A red arrow points from a text box to this icon.

All References

Author Contains tanner + x

And Year Contains + x

And Title Contains + x

Simple search Search options Search

All References
11 References

Search the Web for full text documents for the selected references

	Author	Year	Custom 1	Title	Journal	Last Upd
	Beavis, A.; ...	2021		Treatment of vulvar and vaginal dysplasia...	Int J Gynec...	8.10.20
	Bhadury, ...	2021		Detection of Volatiles from Raw Beef Mea		
	Burel, J. G.;...	2021		Distinct blood transcriptomic signature o		
	Campbell, ...	2021		Photoinduced Covalent Irreversible Inacti		

Let EndNote search for PDFs of your imported references, automatically:
Highlight references ->
«Search the Web for full text documents for the selected references»

Field Open URL PATH:

https://basel.swisscovery.org/view/uresolver/41SLSP_UBS/openurl?

The screenshot shows the 'EndNote Preferences' dialog box. The 'Find Full Text' option in the left-hand menu is circled in red. In the main panel, the 'OpenURL Path' field is also circled in red and contains the URL: `https://basel.swisscovery.org/view/uresolver/41SLSP_UBS/openurl?`. Other options like 'Web of Science Full Text Links', 'DOI (Digital Object Identifier)', 'PubMed LinkOut (U.S. National Library of Medicine)', and 'OpenURL' are checked. There are also buttons for 'EndNote Defaults', 'Revert Panel', 'OK', 'Abbrechen', and 'Übernehmen' at the bottom.

EndNote Preferences

- Change Case
- Display Fields
- Display Font
- Duplicates
- Find Full Text**
- Folder Locations
- Formatting
- Libraries
- PDF Handling
- Read / Unread
- Reference Types
- Sorting
- Spell Check
- Sync
- Temporary Citations
- Term Lists
- URLs & Links

The Find Full Text feature uses several technologies to maximize the chances that EndNote will find all available PDFs. Use this screen to control these full text search options:

- Web of Science Full Text Links
- DOI (Digital Object Identifier)
- PubMed LinkOut (U.S. National Library of Medicine)
- OpenURL

OpenURL Path: `https://basel.swisscovery.org/view/uresolver/41SLSP_UBS/openurl?`

Authenticate with:

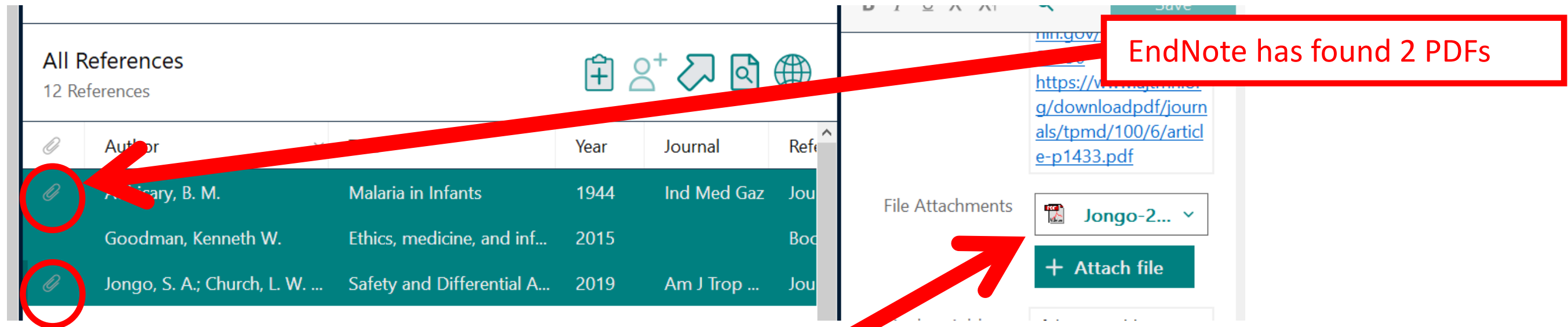
URL:

Examples: `https://login.ezproxy.library.myuniversity.edu/login`
`http://auth.universityname.edu/authentication`

Automatically invoke Find Full Text on newly-imported references

EndNote Defaults Revert Panel OK Abbrechen Übernehmen

2.4. Manage references in EndNote: PDF handling



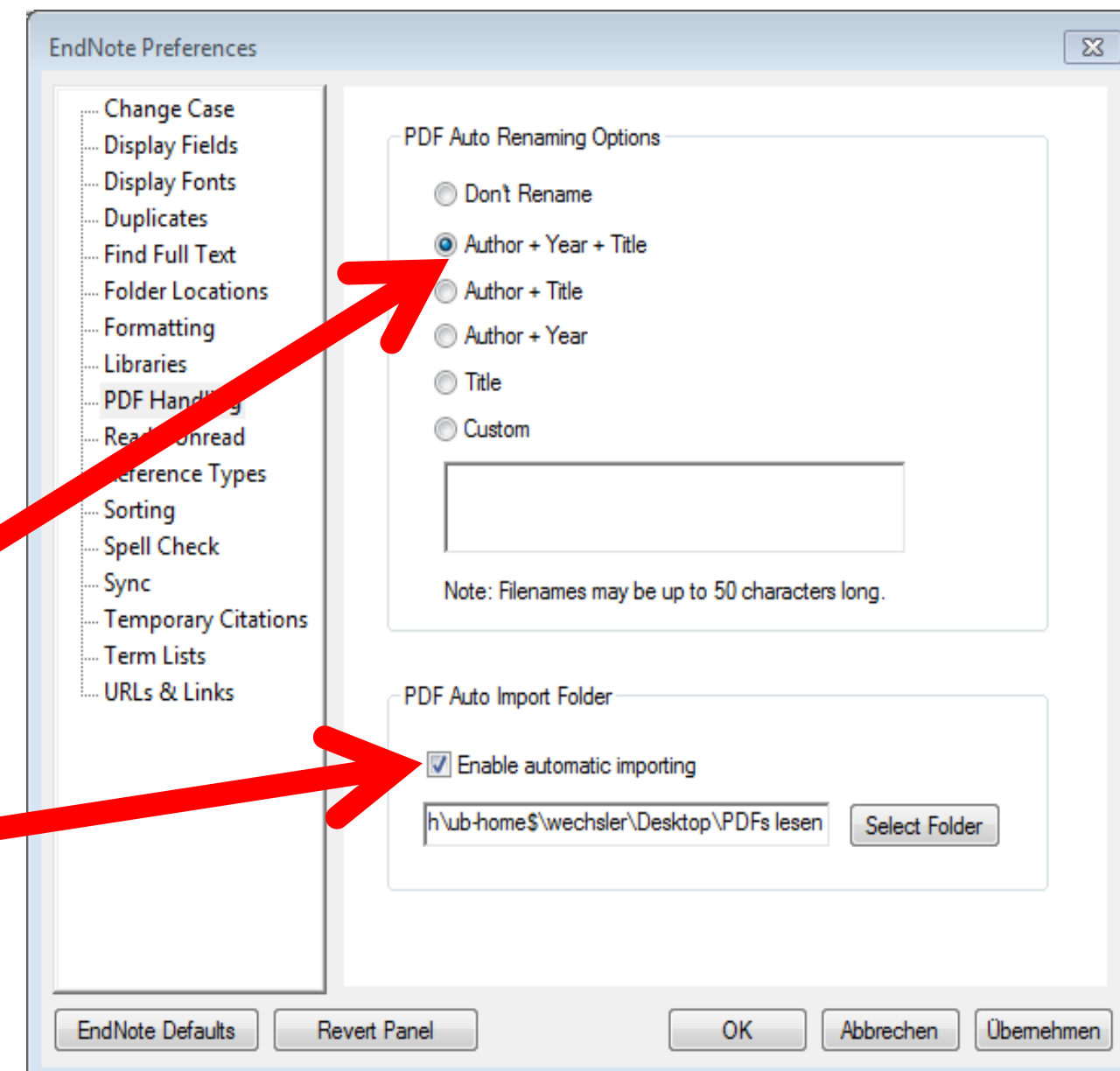
The screenshot shows the EndNote interface. On the left, a table lists 12 references. The first three rows are highlighted in green. The first row is for 'Malaria in Infants' by 'Malaria, B. M.' from 1944. The second row is for 'Ethics, medicine, and inf...' by 'Goodman, Kenneth W.' from 2015. The third row is for 'Safety and Differential A...' by 'Jongo, S. A.; Church, L. W. ...' from 2019. On the right, the 'File Attachments' field is visible, showing a dropdown menu with 'Jongo-2...' and a '+ Attach file' button. A red box highlights the 'File Attachments' field with the text 'EndNote has found 2 PDFs'. Red arrows point from this box to the 'File Attachments' field and to the first two rows of the reference list.

Author	Year	Journal	Ref
Malaria, B. M.	1944	Ind Med Gaz	Jou
Goodman, Kenneth W.	2015	Ethics, medicine, and inf...	Boo
Jongo, S. A.; Church, L. W. ...	2019	Safety and Differential A...	Jou

The downloaded PDFs can be found in field «File Attachments» (and are stored on your computer in the . DATA folder)

Menu *Edit* -> *Preferences*:

- Define how PDFs are named
- Enable automatic importing: Every stored PDF in this folder will be imported to EndNote automatically
- All PDFs within EndNote are stored in a folder .DATA (see chapter 1 «Getting started: Create an EndNote Library»)



The screenshot shows the 'EndNote Preferences' dialog box. The 'PDF Handling' section is selected in the left sidebar. The 'PDF Auto Renaming Options' section has 'Author + Year + Title' selected. The 'PDF Auto Import Folder' section has 'Enable automatic importing' checked and the folder path 'h:\ub-home\$\wechsler\Desktop\PDFs lesen' entered. Red arrows point from the text boxes to these specific settings.

EndNote Preferences

- Change Case
- Display Fields
- Display Fonts
- Duplicates
- Find Full Text
- Folder Locations
- Formatting
- Libraries
- PDF Handling
- Read/Unread
- Reference Types
- Sorting
- Spell Check
- Sync
- Temporary Citations
- Term Lists
- URLs & Links

PDF Auto Renaming Options

- Don't Rename
- Author + Year + Title
- Author + Title
- Author + Year
- Title
- Custom

Note: Filenames may be up to 50 characters long.

PDF Auto Import Folder

- Enable automatic importing
- h:\ub-home\$\wechsler\Desktop\PDFs lesen

EndNote Defaults Revert Panel OK Abbrechen Übernehmen

2.4. Manage references in EndNote: attach fulltexts / PDFs manually

1.

PDFs not found by EndNote must be searched for individually -> download them to your computer

2.

Drag & Drop the PDF to the corresponding reference.
PDF on desktop may be deleted. All PDFs within EndNote are stored in the .DATA folder.

The screenshot shows the EndNote application window titled "My EndNote Library". The left sidebar contains a list of reference groups: "All References" (13), "Dokument1" (1), "Duplicate References" (5), "Imported References" (1), "Recently Added" (13), "Unfiled" (11), and "Trash" (24). Under "MY GROUPS", there are "Discussion" (2), "Introduction" (0), "Lesen", and "Prio 1" (0). The main window displays a table of "All References" with 13 entries. The table has columns for Author, Title, Year, and Journal. A red arrow points from a PDF file icon on the desktop, labeled "artikel_vonHandan...", to the "Malaria in Infants" reference entry in the table.

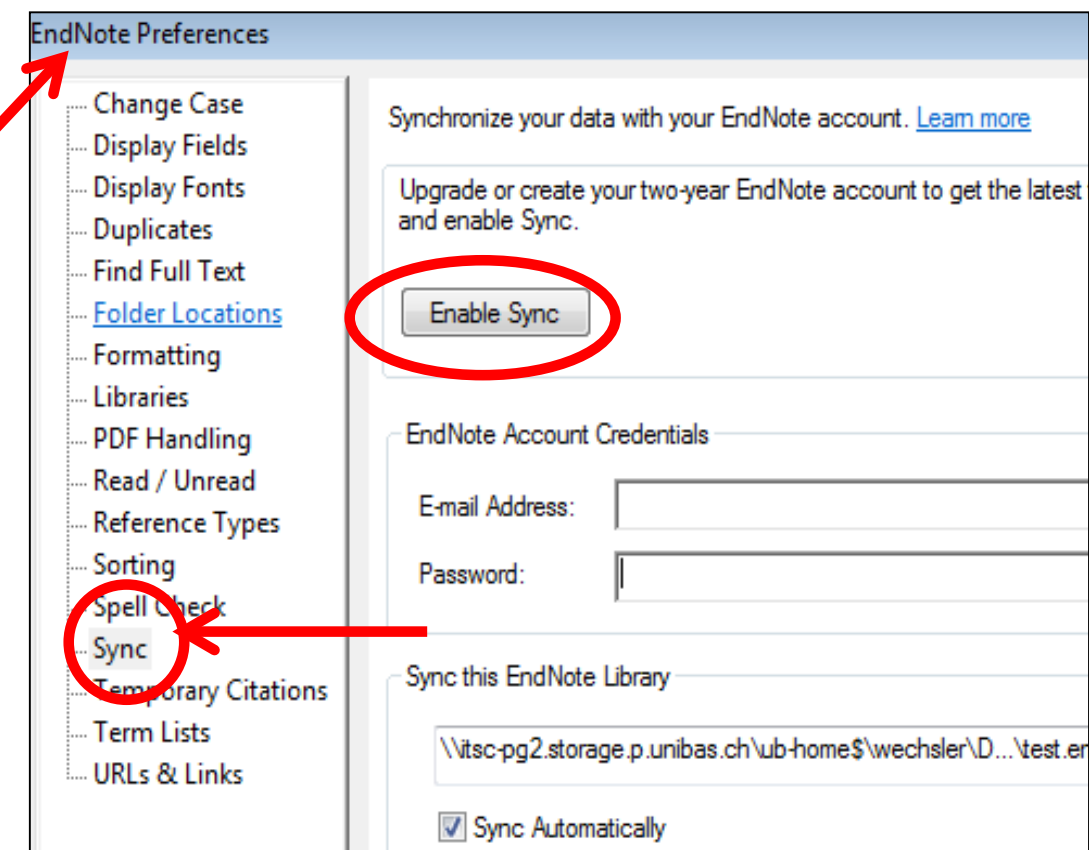
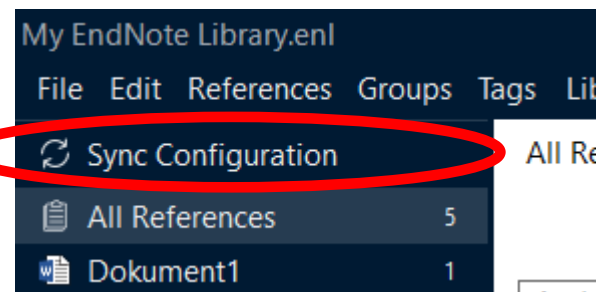
Author	Title	Year	Journal
Adhicary, B. M.	Malaria in Infants	1944	Ind M
Goodman, Kenneth W.	Ethics, medicine, an	2015	
Jongo, S. A.; Church, L. W. ...	Safety and Differential A...	2019	Am J Trop ...
Jongo, S. A.; Church, L. W. ...	Safety and Differential A...	2019	Am J Trop ...
Jongo, S. A.; Church, L. W. ...	Safety and Differential A	2019	Am J Trop

2.5. EndNote Web account: register & synchronize

- With EndNote Web 21 you can access your library including PDFs via the cloud. Switch between online, desktop and iPad applications.
- The web account of EndNote Web 21 is free of charge if you have purchased EndNote desktop.

- Register for the webaccount **within EndNote desktop**:
Edit -> Preferences -> Sync... -> Enable Sync -> Sign up

- *Synchronize your library in EndNote Desktop*



- LogIn for EndNote Web 21 on <https://endnote.com/login/>

Important note:

If you have an online library synced that is different to the one you want to sync now, both libraries will be merged: there is one web account only and therefore one online library only): **Only one Library can be synced with EndNote online at any one time.**

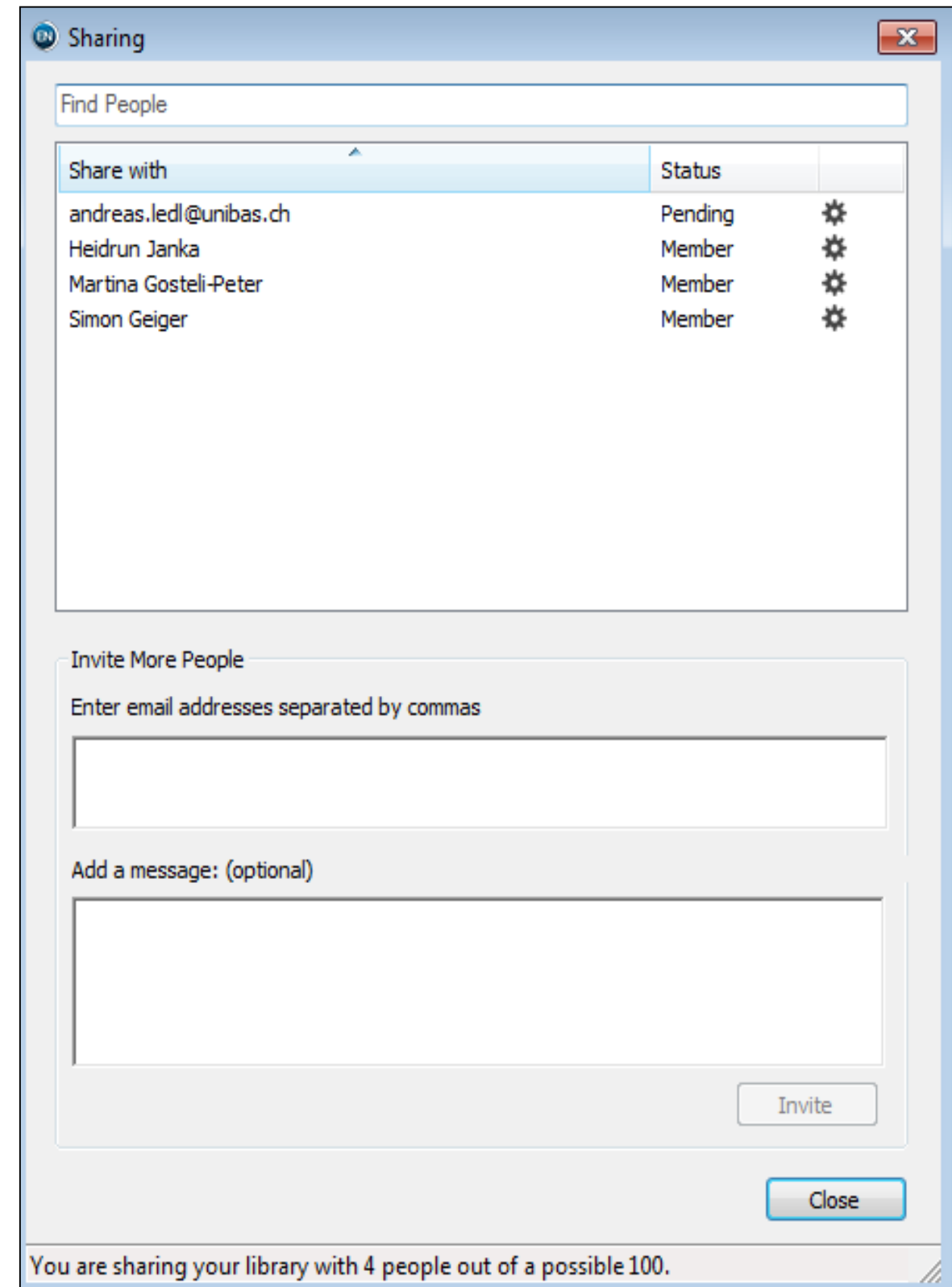
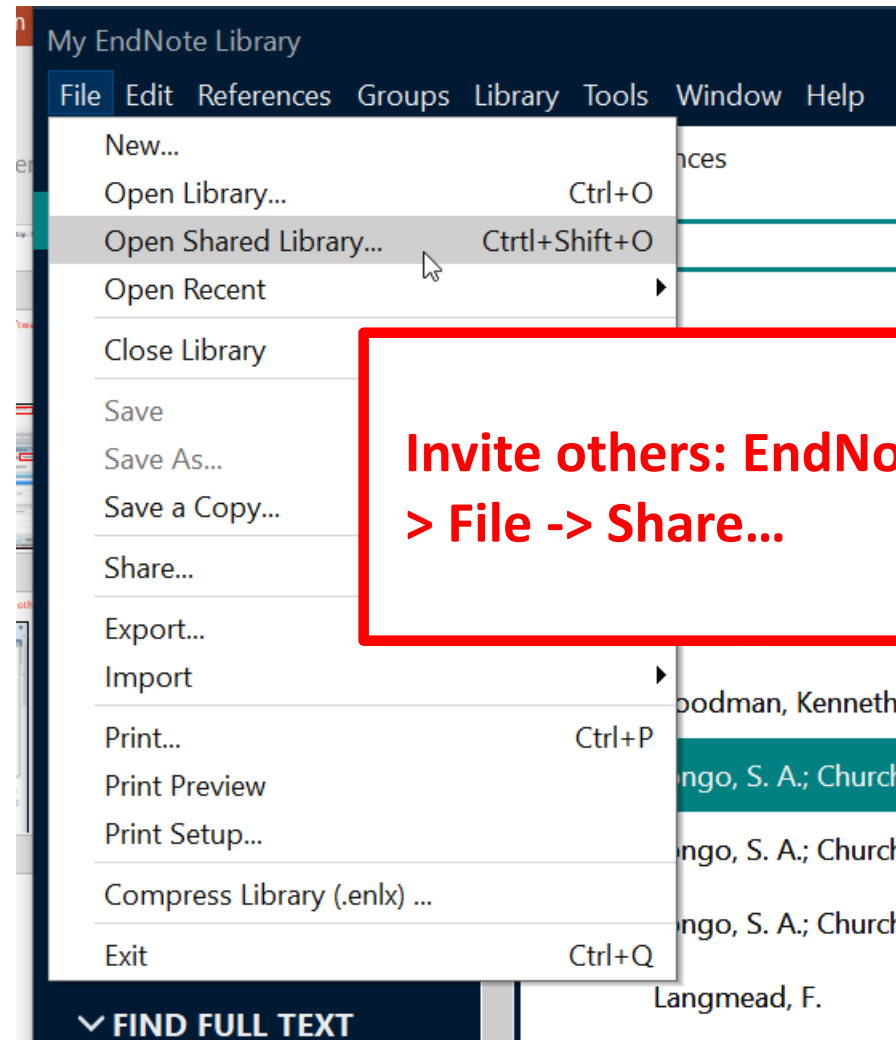
2.6. Sharing Libraries

The screenshot shows the EndNote X8 software interface. The 'File' menu is open, with 'Open Shared Library...' and 'Share...' highlighted by red boxes. A red text box above the menu reads: "Menu File -> Open Shared Library...(login to web account not necessary)". A 'Sharing' dialog box is open in the foreground, showing a list of users to share with. The list has columns for 'Share with', 'Status', and a gear icon. The users listed are: andreas.ledl@unibas.ch (Pending), Heidrun Janka (Member), Martina Gosteli-Peter (Member), and Simon Geiger (Member). Below the list is a section for 'Invite More People' with a text input field for email addresses. The background shows a list of references with columns for 'Year', 'Last Updated', and 'Reference Type'.

Menu File -> Open Shared Library...(login to web account not necessary)

Invite others: Menu File -> Share...

- Version X7.2 and higher
- Share references with others incl. PDFs; PDFs may be annotated
- 100 persons per library
- Unlimited storage
- Only 1 library may be shared with others!
- All participants have same rights (add, edit, delete references, annotate PDFs ...)
- Web account is a condition to share but is not necessary to open.
- You can share groups instead of the whole library by right mouse clicking on a group and selecting Share Group.



2.7. FAQs

Using EndNote 21 with Google Docs and with Word Online

- EndNote Cite While You Write add-on now has a native integration with Google Docs as well Word Online and is a tool for collaboration with research colleagues. It allows to pool own references with collaborators' references.
- Word Online: https://support.clarivate.com/EndNote/s/article/EndNote-Word-Online-CWYW?language=en_US
- Google Docs: https://support.clarivate.com/EndNote/s/article/Google-Docs-CWYW?language=en_US

Using EndNote with Google Docs (EndNote 20 and before)

- There is no EndNote Cite While You Write tool available for Google Docs for earlier EndNote versions. However, it is still possible to use earlier EndNote versions with Google Docs by inserting unformatted citations, saving it as an RTF file and then formatting the document using EndNote.
- See LibGuide with screenshots of James Cook University Australia: <https://libguides.jcu.edu.au/endnote/google-docs>

Insert a bibliography list after each chapter

- From the EndNote Library: Modify the style in the style menu -> Choose Sections-> Check “Create a bibliography for each section” -> save the new style
- On the Word document: Insert section break to each chapter and apply the modified style
- See LibGuide Univ. Tennessee: <https://libguides.uthsc.edu/endnote/cwyw/separate-bibs>

2.7. FAQs

Combining multiple word documents

- If you want to produce one single Word document with one reference list at the end. Before merging documents, all the references from each Word document must be exported into one EndNote Library. You can use in Word the [export traveling library](#) option to do this.
- See LibGuide Univ. Tennessee: <https://libguides.uthsc.edu/endnote/cwyw/combine-worddocs>

Add references to EndNote from a PDF/word to EndNote without EndNote codes

- Upload the copied reference list to <https://citation-finder.vercel.app/> -> Choose RIS -> Search for matches -> check all references -> save the file and import it to EndNote
- See instruction in Tennessee LibGuide: <https://libguides.uthsc.edu/c.php?g=320620&p=7700501>

See lot's of Tips & Tricks at Tennessee University Health Sciences Center:
<https://libguides.uthsc.edu/endnote> and on supports site of EndNote:
https://support.clarivate.com/s/?language=en_US

2.7. FAQs

Add references from a PDF/word to EndNote with existing EndNote codes

- you can use the Export Travel Library command in word as long as the references originally came from either an EndNote desktop or an EndNote Web library, the field codes are still present, and you are using Microsoft Word with EndNote.
- **Note:** You may have problems if you are using a version of EndNote older than the version used by those sending you documents. EndNote field codes have changed over time, and an older version of EndNote may not recognize newer field codes.

Taggin your references

- You can add tags to references and customise the colour and name of the tags.
- See Details: <https://library-guides.ucl.ac.uk/endnote/tagging-references>

See lot's of Tips & Tricks:

- Tennessee University Health Sciences Center: <https://libguides.uthsc.edu/endnote>
- UCL Library Services: <https://library-guides.ucl.ac.uk/endnote/tagging-references>
- supports site of EndNote: https://support.clarivate.com/s/?language=en_US



Contact & Support

Monika Wechsler, MSc. Biol.
Medical Information Specialist
monika.wechsler@unibas.ch

UNIVERSITÄT BASEL

UB Medizin

Spiegelgasse 5

<https://ub.unibas.ch/de/ub-medizin/>