

# ENDNOTE X7

THE LITTLE ENDNOTE HOW-TO BOOK



## 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 or converting references kept in another program to references in an EndNote library. 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!

# TABLE OF CONTENTS

<b>1</b>	<b>USING DIRECT EXPORT TO IMPORT REFERENCES FROM ONLINE DATABASES.....</b>	<b>5</b>
<b>1.1</b>	<b>DIRECT EXPORT FROM THOMSON REUTERS WEB OF SCIENCE .....</b>	<b>5</b>
1.1.1	Using the Marked List .....	5
1.1.2	Not Using the Marked List.....	7
<b>1.2</b>	<b>DIRECT EXPORT FROM PUBMED .....</b>	<b>9</b>
1.2.1	Using the Clipboard.....	9
1.2.2	Not Using the Clipboard .....	11
<b>1.3</b>	<b>BROWSER ACTIONS WITH DIRECT EXPORT.....</b>	<b>13</b>
1.3.1	Firefox on Windows.....	13
1.3.2	Firefox on Macintosh.....	15
1.3.3	Internet Explorer on Windows .....	17
1.3.4	Google Chrome on Windows .....	17
<b>1.4</b>	<b>ENDNOTE ONLINE PLUG-INS FOR DIRECT EXPORT .....</b>	<b>18</b>
1.4.1	Internet Explorer.....	18
1.4.2	Firefox .....	19
1.4.3	Google Chrome.....	20
<b>2</b>	<b>IMPORTING PDF FILES AND PDF HANDLING .....</b>	<b>21</b>
<b>2.1</b>	<b>IMPORTING PDF FILES .....</b>	<b>21</b>
2.1.1	Importing a Folder of PDF Files on Windows .....	21
2.1.2	Importing a Folder of PDF Files on Macintosh .....	22
<b>2.2</b>	<b>SETTING PDF HANDLING.....</b>	<b>23</b>
2.2.1	Windows.....	23
2.2.2	Macintosh.....	24
<b>3</b>	<b>ENDNOTE ONLINE .....</b>	<b>26</b>
<b>3.1</b>	<b>SET UP ENDNOTE SYNC.....</b>	<b>26</b>
3.1.1	Back Up the EndNote Desktop Library .....	26
3.1.2	EndNote Sync .....	27
<b>3.2</b>	<b>INSTALLING THE INTERNET EXPLORER PLUG-IN.....</b>	<b>28</b>
3.2.1	From within Internet Explorer .....	28
3.2.2	Installing from the Downloaded .msi File .....	33
<b>3.3</b>	<b>INSTALLING THE FIREFOX EXTENSION .....</b>	<b>33</b>
3.3.1	Windows and Macintosh .....	33
<b>3.4</b>	<b>USING DIRECT EXPORT ONLINE .....</b>	<b>35</b>
<b>3.5</b>	<b>CAPTURING MULTIPLE REFERENCES.....</b>	<b>35</b>
3.5.1	Installing the Capture Bookmarklet.....	35

3.5.2	Capture a Page of References from Google Scholar .....	36
3.5.3	Capture a Set of References from PubMed.....	37
<b>3.6</b>	<b>CAPTURING A SINGLE REFERENCE .....</b>	<b>39</b>
<b>4</b>	<b>CITE WHILE YOU WRITE.....</b>	<b>41</b>
<b>4.1</b>	<b>CITE WHILE YOU WRITE IN MICROSOFT WORD ON WINDOWS.....</b>	<b>41</b>
4.1.1	Installing the Cite While You Write Tools.....	41
4.1.2	Adding Citations to a Document Using Insert Citation.....	41
4.1.3	Adding Citations to a Document Using Insert Selected Citations .....	43
4.1.4	Selecting the EndNote Style for Your Citations and Bibliography .....	43
4.1.5	Editing Citations in the Document.....	44
<b>4.2</b>	<b>CITE WHILE YOU WRITE IN MICROSOFT WORD ON MACINTOSH.....</b>	<b>47</b>
4.2.1	Installing the Cite While You Write Tools.....	47
4.2.2	Adding Citations to a Document Using Insert Citation.....	47
4.2.3	Adding Citations to a Document Using Insert Selected Citations .....	49
4.2.4	Selecting the EndNote Style for Your Citations and Bibliography .....	50
4.2.5	Editing Citations in the Document.....	51
<b>5</b>	<b>COLLABORATION: SHARING ENDNOTE REFERENCES .....</b>	<b>55</b>
<b>5.1</b>	<b>HOW NOT TO SHARE AN ENDNOTE LIBRARY.....</b>	<b>55</b>
5.1.1	Don't Put EndNote Libraries on "Cloud" Services.....	55
5.1.2	Don't Put EndNote Libraries on Distant Network Servers .....	55
5.1.3	Don't Send the .enl File for a Library When Sharing a Library .....	55
<b>5.2</b>	<b>SHARE GROUPS IN ENDNOTE ONLINE.....</b>	<b>56</b>
5.2.1	Creating an EndNote Online Library .....	57
5.2.2	Share Your Group in EndNote Online.....	57
5.2.3	What the User You Shared Your Group with Will See.....	59
<b>5.3</b>	<b>PUT A READ-ONLY ENDNOTE LIBRARY ON A NETWORK DRIVE .....</b>	<b>60</b>
<b>5.4</b>	<b>SEND A COMPRESSED LIBRARY.....</b>	<b>60</b>
<b>5.5</b>	<b>THE TRAVELING LIBRARY .....</b>	<b>62</b>
5.5.1	Using the Traveling Library To Create Bibliographies in Shared Documents .....	62
5.5.2	Exporting the Traveling Library .....	64
<b>6</b>	<b>CONVERTING FROM OTHER REFERENCING SOFTWARE.....</b>	<b>65</b>
<b>6.1</b>	<b>CONVERTING FROM REFERENCE MANAGER TO ENDNOTE.....</b>	<b>65</b>
6.1.1	Converting the Reference Manager Database .....	65
6.1.2	Converting Reference Manager Attachments to EndNote Attachments .....	69
6.1.3	Converting Word Documents with Reference Manager Citations .....	71
<b>7</b>	<b>INDEX .....</b>	<b>74</b>

# 1 USING DIRECT EXPORT TO IMPORT REFERENCES FROM ONLINE DATABASES

## 1.1 DIRECT EXPORT FROM THOMSON REUTERS WEB OF SCIENCE

### 1.1.1 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.

Add to Marked List

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

Marked List 10

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

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.**

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

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

☐ Select All | [Reset](#)

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

\*Selecting these items will increase the processing time.

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

Send to: **Save to EndNote online** ▼

- 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).

#### 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:

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

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

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

Send to: **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

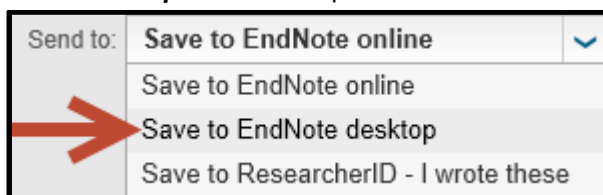
Chrome on the Macintosh does not reliably support direct export.

- Safari on Macintosh

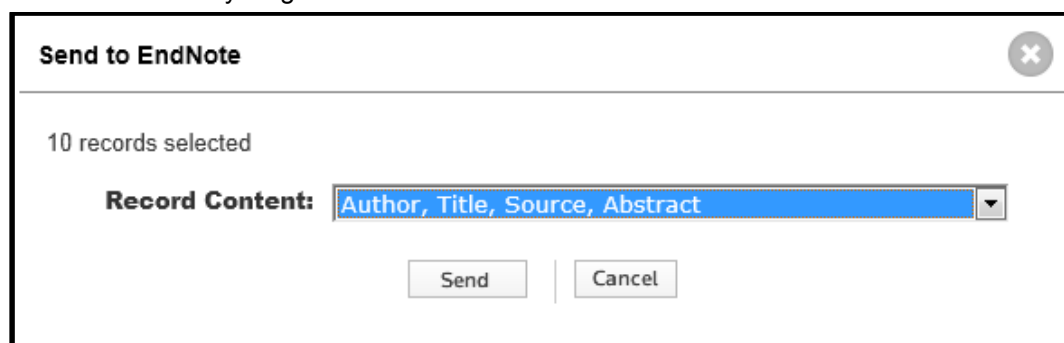
Safari does not support direct export.

### 1.1.2 Not Using the Marked List

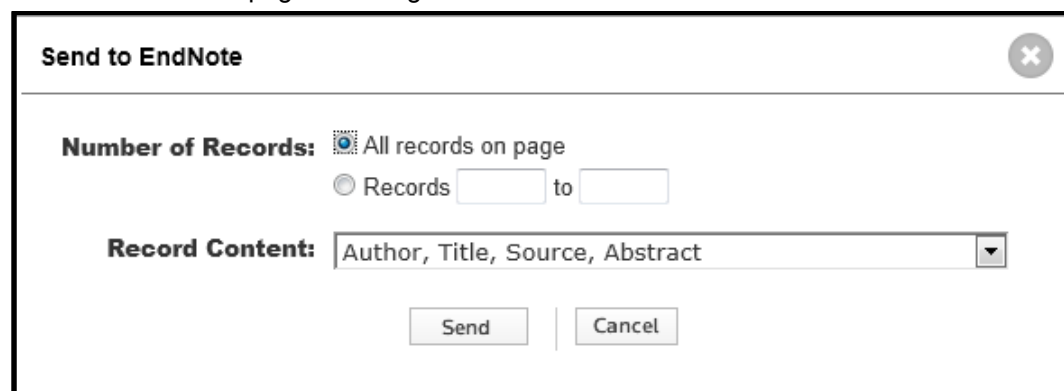
- Perform your search on the Web of Science and select the references you want to import. Then select **Save to EndNote desktop** from the drop-down **Send to** list.




- 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.



- 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.



- 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.

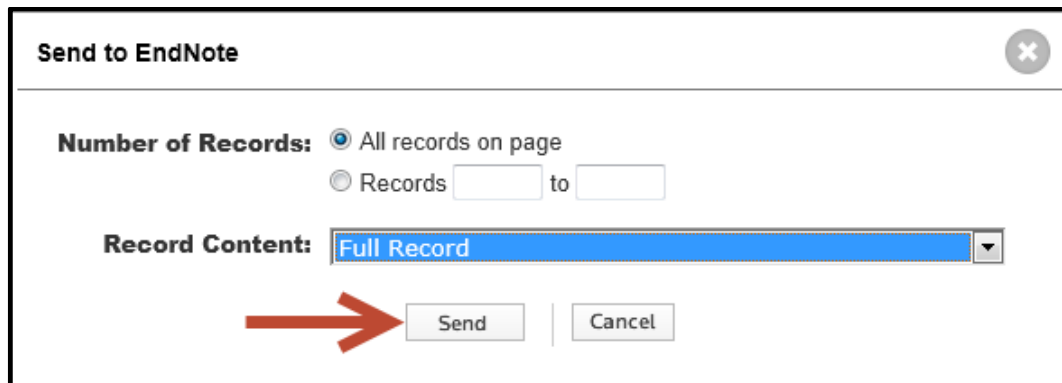


**Send to EndNote**

**Number of Records:** ☒ All records on page  
☐ Records  to

**Record Content:** Author, Title, Source, Abstract ▼  
 Author, Title, Source  
 Author, Title, Source, Abstract  
**Full Record**  
 Full Record and Cited References


- Then click the **Send** button.



**Send to EndNote**

**Number of Records:** ☒ All records on page  
☐ Records  to

**Record Content:** Full Record ▼



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

Chrome on the Macintosh does not reliably support direct export.

- Safari on Macintosh

Safari does not support direct export.

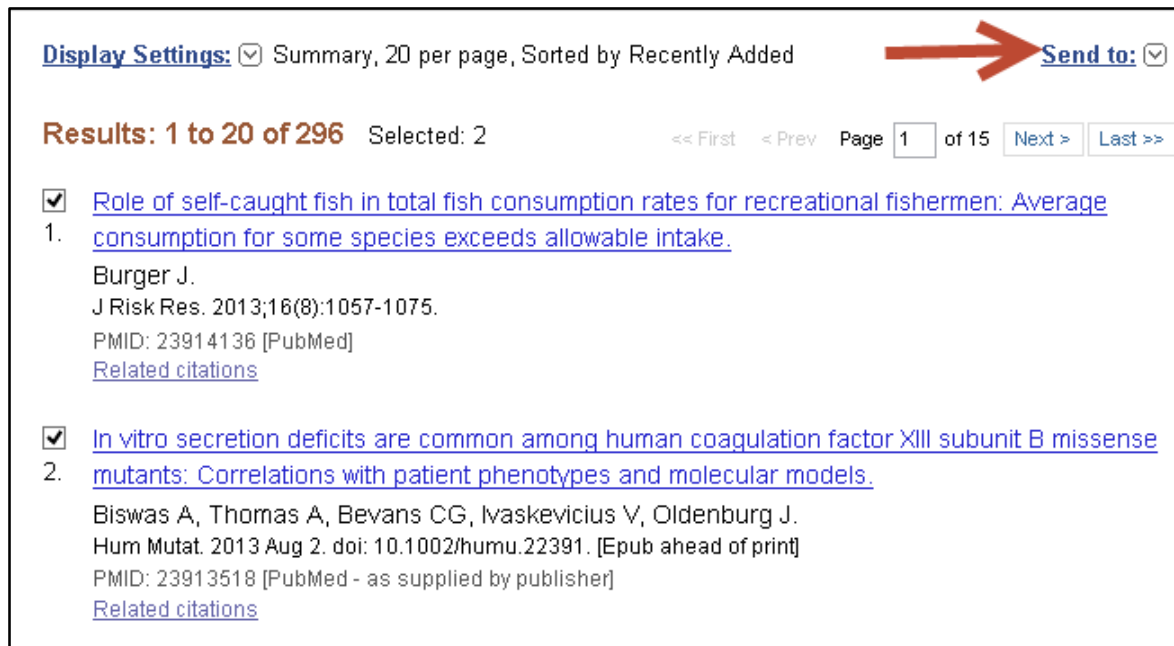


## 1.2 DIRECT EXPORT FROM PUBMED

### 1.2.1 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.



The screenshot shows the PubMed search results interface. At the top, there is a 'Display Settings' section with a dropdown menu set to 'Summary, 20 per page, Sorted by Recently Added'. To the right of this is a red arrow pointing to the 'Send to:' link, which has a dropdown arrow next to it. Below the settings, the results are displayed as 'Results: 1 to 20 of 296'. There are navigation links: '<< First', '< Prev', 'Page 1 of 15', 'Next >', and 'Last >>'. Two references are listed, each with a checkbox to its left. The first reference is checked, and the second is also checked. Each reference includes the title, authors, journal information, PMID, and a link to 'Related citations'.

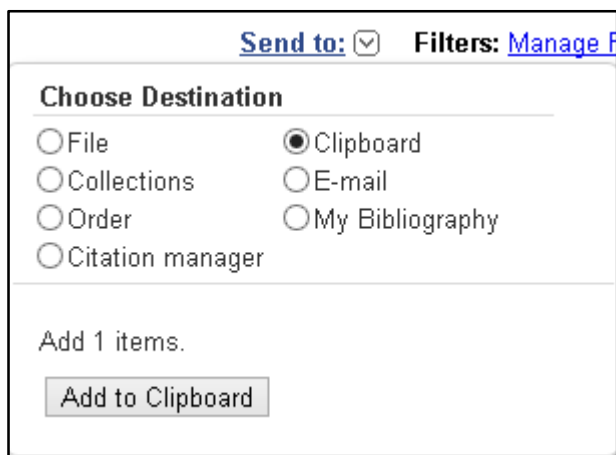
**Display Settings:** ☒ Summary, 20 per page, Sorted by Recently Added **Send to:** ☐

**Results: 1 to 20 of 296** Selected: 2 << First < Prev Page 1 of 15 Next > Last >>

☒ [Role of self-caught fish in total fish consumption rates for recreational fishermen: Average consumption for some species exceeds allowable intake.](#)  
1. Burger J.  
J Risk Res. 2013;16(8):1057-1075.  
PMID: 23914136 [PubMed]  
[Related citations](#)

☒ [In vitro secretion deficits are common among human coagulation factor XIII subunit B missense mutants: Correlations with patient phenotypes and molecular models.](#)  
2. Biswas A, Thomas A, Bevans CG, Ivaskевичius V, Oldenburg J.  
Hum Mutat. 2013 Aug 2. doi: 10.1002/humu.22391. [Epub ahead of print]  
PMID: 23913518 [PubMed - as supplied by publisher]  
[Related citations](#)

- 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.



The screenshot shows a 'Send to' dialog box. At the top, there is a 'Send to:' dropdown menu set to 'Clipboard' and a 'Filters: Manage F' link. Below this is a section titled 'Choose Destination' with several radio button options: 'File', 'Clipboard' (which is selected), 'Collections', 'E-mail', 'Order', 'My Bibliography', and 'Citation manager'. At the bottom, there is a message 'Add 1 items.' and a button labeled 'Add to Clipboard'.

**Send to:** ☒ **Filters:** [Manage F](#)

**Choose Destination**

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

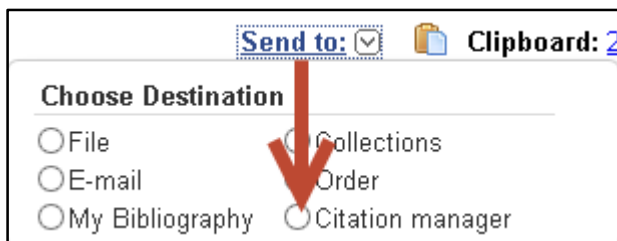
Add 1 items.

**Add to Clipboard**

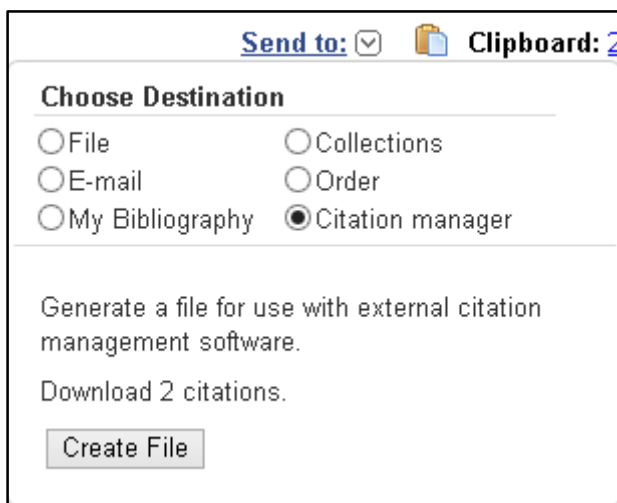
- After adding items to the Clipboard, you will see a *Clipboard* link to the right of the *Send to* link, telling you how many items are in the Clipboard. When you have finished adding items to the Clipboard and are ready to send them to EndNote, click the **Clipboard items** link.



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



- Click the **Create File** 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 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

Chrome on the Macintosh does not reliably support direct export.

- Safari on Macintosh

Safari does not support direct export.

### 1.2.2 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.



**Display Settings:** ☒ Summary, 20 per page, Sorted by Recently Added  **Send to:** ☐

☒ 1 item was added to the Clipboard.

 Clipboard items will be lost after eight hours of inactivity. The maximum number of Clipboard items is 500.

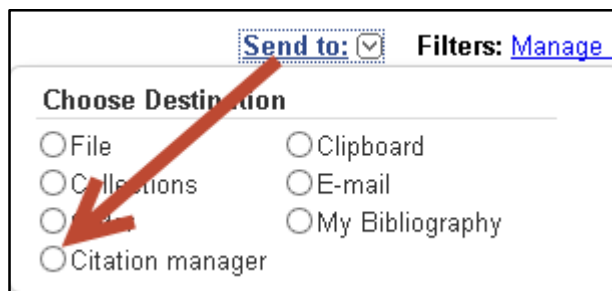
---

**Results: 1 to 20 of 296** << First < Prev Page 1 of 15 Next > Last >>

☐ [Role of self-caught fish in total fish consumption rates for recreational fishermen: Average consumption for some species exceeds allowable intake.](#)

1. Burger J.  
J Risk Res. 2013;16(8):1057-1075.  
PMID: 23914136 [PubMed]  
[Related citations](#)

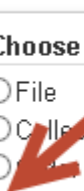
- Then select **Citation Manager**.



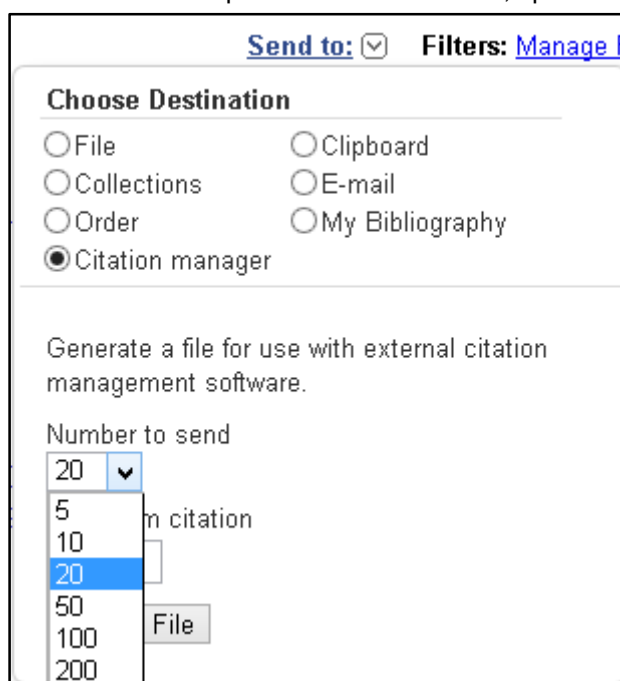
**Send to:** ☒ **Filters:** [Manage filters](#)

**Choose Destination**

<input type="radio"/> File	<input type="radio"/> Clipboard
<input type="radio"/> Collections	<input type="radio"/> E-mail
<input type="radio"/> My Bibliography	<input type="radio"/> Citation manager



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



Send to: ☒ Filters: [Manage F](#)

**Choose Destination**

☐ File
 ☐ Clipboard

☐ Collections
 ☐ E-mail

☐ Order
 ☐ My Bibliography

☒ Citation manager

Generate a file for use with external citation management software.

Number to send

20 ▼

5

10

20

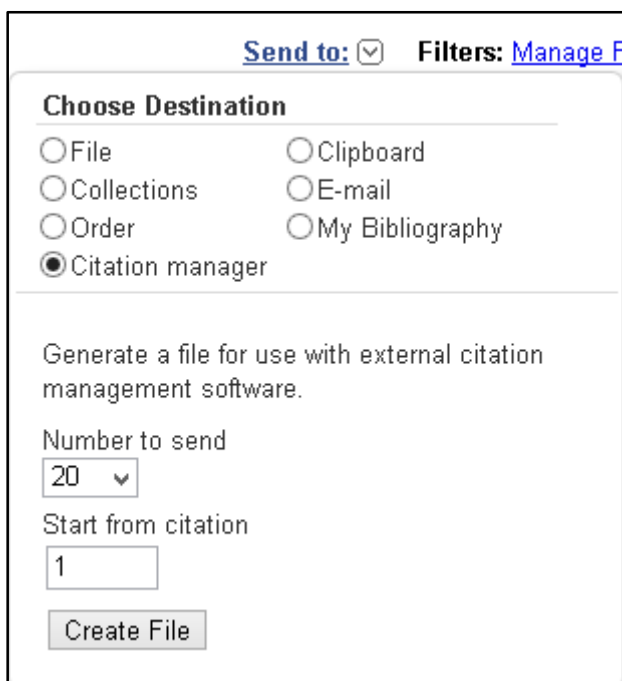
50

100

200

File

- 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.



Send to: ☒ Filters: [Manage F](#)

**Choose Destination**

☐ File
 ☐ Clipboard

☐ Collections
 ☐ E-mail

☐ Order
 ☐ My Bibliography

☒ Citation manager

Generate a file for use with external citation management software.

Number to send

20 ▼

Start from citation

1

Create File

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

Chrome on the Macintosh does not reliably support direct export.

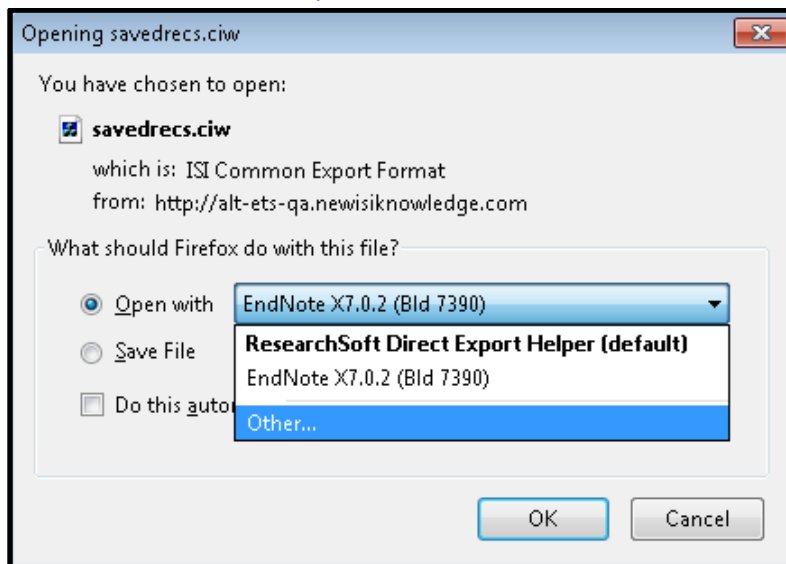
- Safari on Macintosh

Safari does not support direct export.

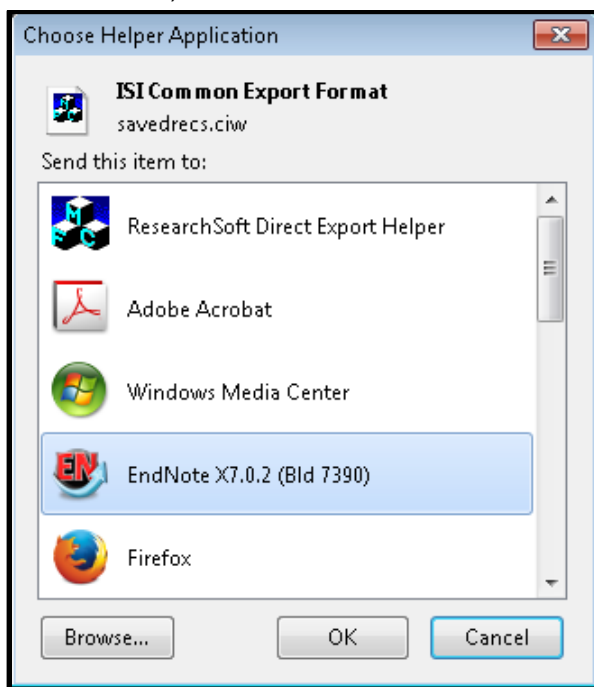
## 1.3 BROWSER ACTIONS WITH DIRECT EXPORT

### 1.3.1 Firefox on Windows

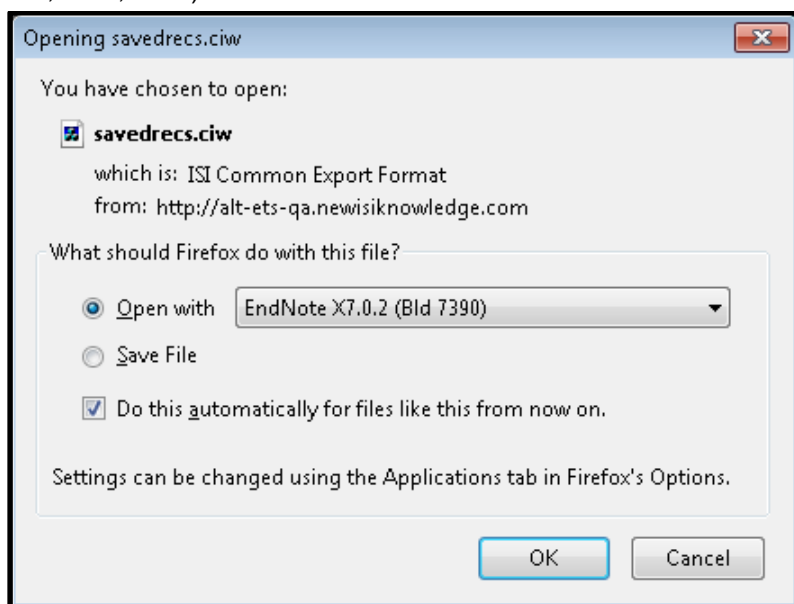
- Your EndNote library should be open before attempting to import references.
- Firefox will bring up a window like the one below the first time a new export file type attempts to download. To have the file open in EndNote so the references will be imported, you can select the **ResearchSoft Direct Export Helper** if you see it shown as the default, or you can click on the drop-down list and select the **Other** option as shown.



- This should bring up a window like the one below. Select **EndNote** from this list (your version may vary from the version shown here). Then click on the **OK** button.



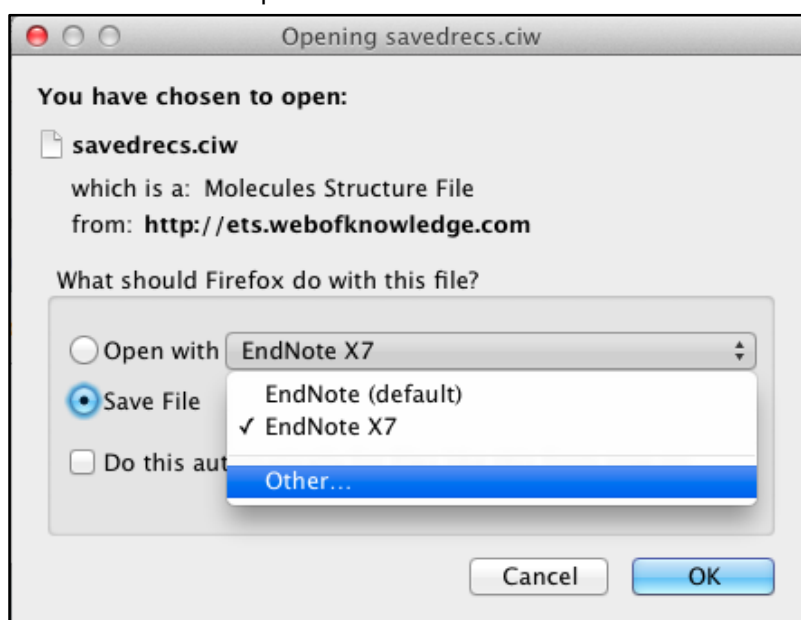
- When returned to the window below, you may select the option to **Do this automatically for files like this from now on**. Please note there are several different files types that work with direct export, and you will need to go through this process for each of these file types (.ciw, .ris, .ovd, .enw,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



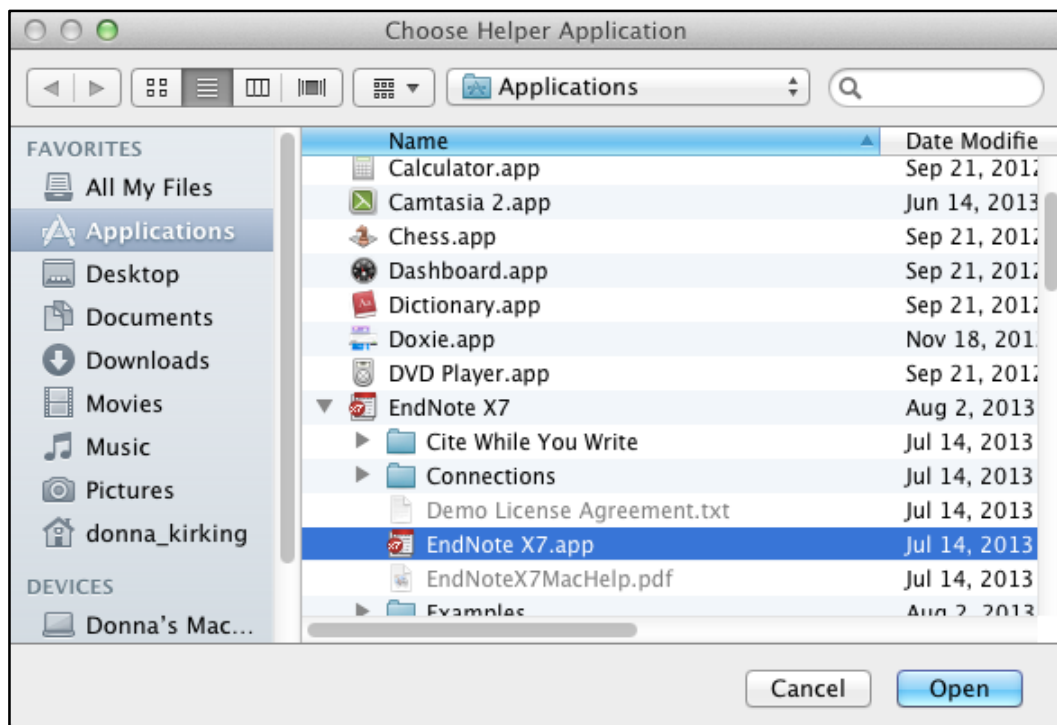
- Click the **OK** button to finish the import into EndNote.

### 1.3.2 Firefox on Macintosh

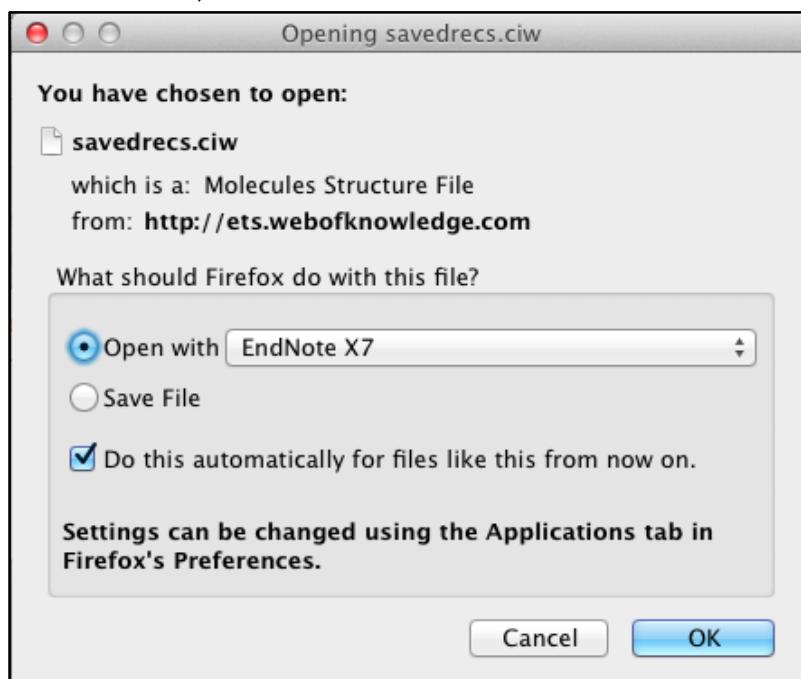
- Your EndNote library should be open before attempting to import references.
- There is a known issue with direct export and EndNote libraries saved as a package (.enlp) on the Mac. EndNote will ask you to select a library even though your library is already open when importing. Clicking “Cancel” will 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 on the drop-down list and select the **Other** option as shown.



- 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).

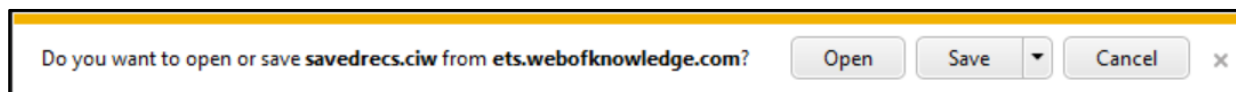


- Click the **OK** button to finish the import into EndNote.



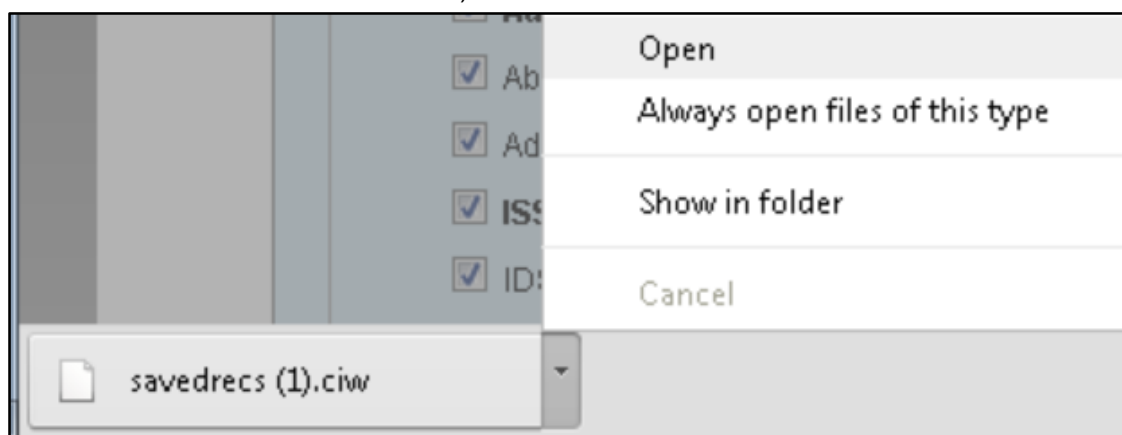
### 1.3.3 Internet Explorer on Windows

- 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.

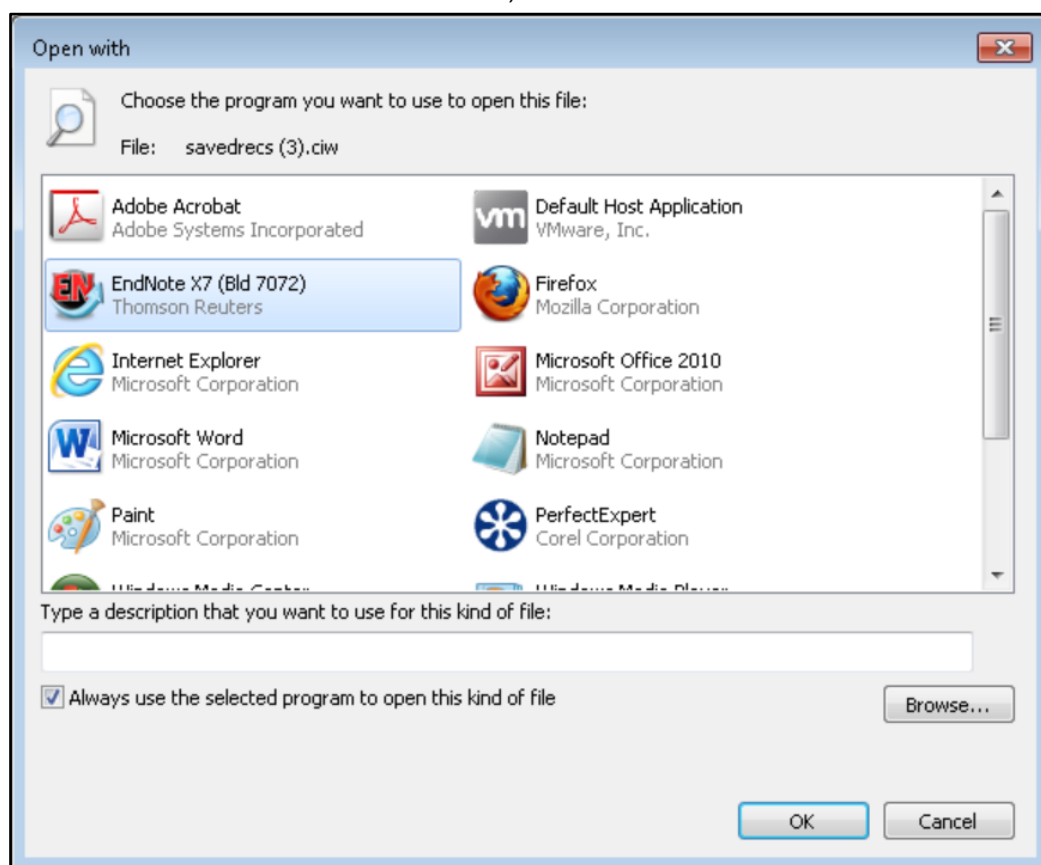


### 1.3.4 Google Chrome on Windows

- 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.)



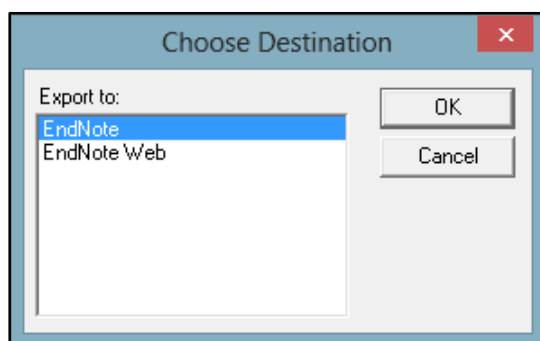
- You will then see a window similar to this, showing you a list of possible programs for opening the file. Select **EndNote** from the list, then click the **OK** button. (Note: If you have installed the EndNote online plug-in for Internet Explorer and have previously set this file type to open, you may not see this window in Chrome. See section 1.4.3.)



## 1.4 ENDNOTE ONLINE PLUG-INS FOR DIRECT EXPORT

### 1.4.1 Internet Explorer

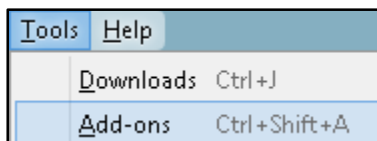
- If you have installed the EndNote online plug-in for Internet Explorer, you will see a window like the one below when you use direct export. Select EndNote if you want the search results sent to your EndNote desktop library. Select EndNote Web if you want the search results sent to your EndNote online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



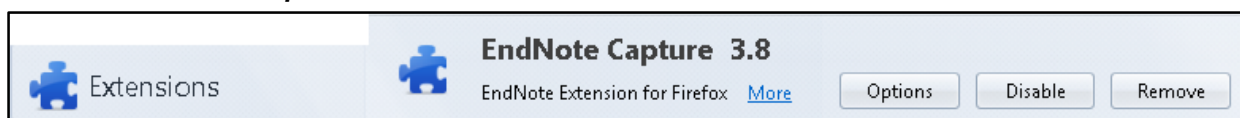
### 1.4.2 Firefox

If you have installed the EndNote online extension for Firefox, you will need to set the extension options/preferences to direct search results to either EndNote desktop or EndNote online. The screenshots below are from Windows, but the instructions are the same on Macintosh, except as stated below.

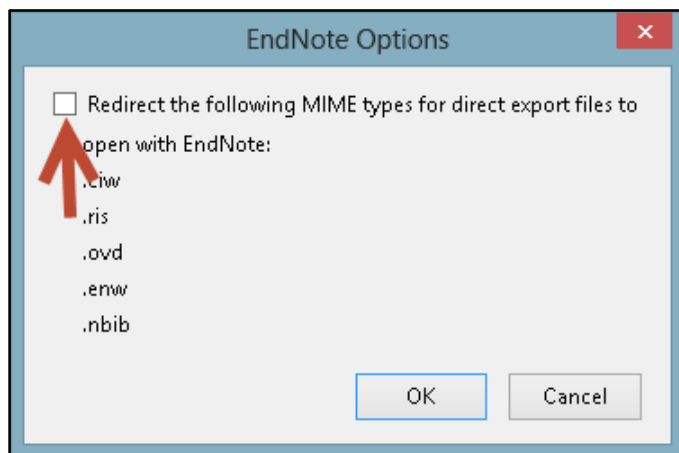
- Select **Add-ons** from the **Tools** menu whenever you want to switch between sending references to either EndNote desktop or EndNote online.



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

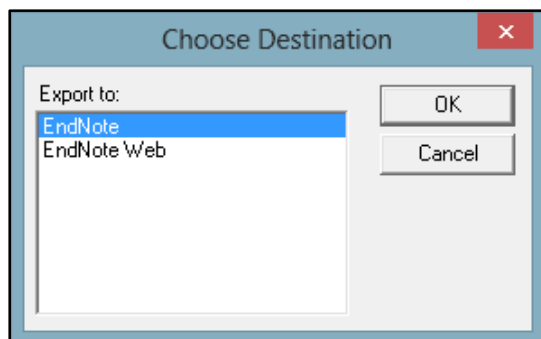


- Mark the box labeled **Redirect the following MIME types for direct export files to open with EndNote:** if you want the results to be sent to **EndNote online**. Unmark the same box if you want to be able to send the results to **EndNote desktop** as described earlier in this chapter.



### 1.4.3 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 1.3.4.

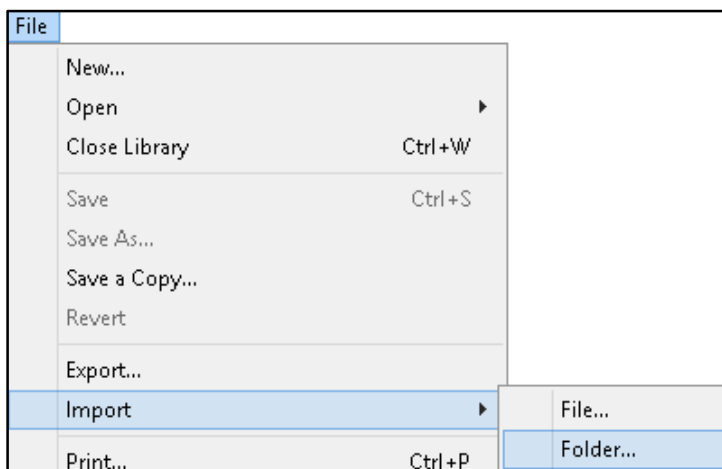
## 2 IMPORTING PDF FILES AND PDF HANDLING

### 2.1 IMPORTING PDF FILES

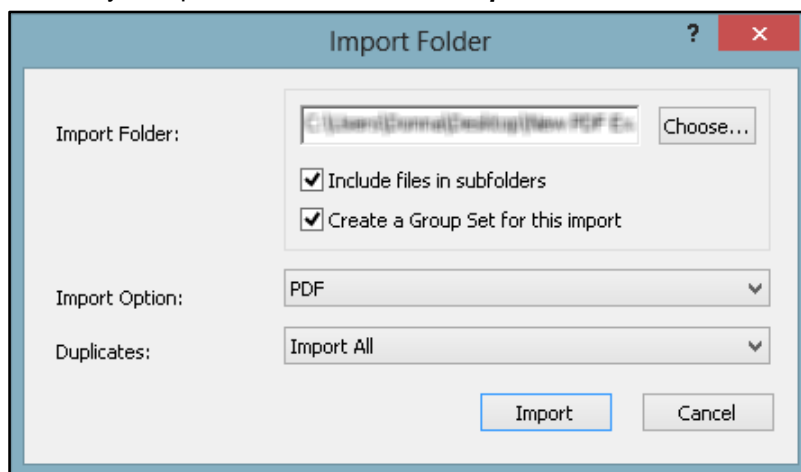
EndNote can import PDF files containing a Digital Object Identifier (DOI) in the metadata or the first two pages of the PDF. EndNote sends the DOI to PubMed and CrossRef, online databases capable of looking up reference data by DOI. The online databases send back the bibliographic information, EndNote 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.

#### 2.1.1 Importing a Folder of PDF Files on Windows

- Select **Import** from the **File** menu, then select **Folder**.



- 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. If you wish to include subfolders within that folder, mark the box labeled **Include files in subfolders**. 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.) When all your options are set, click the **Import** button.

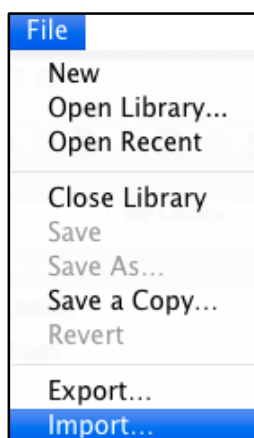


- The PDF files are imported. Below you see an example of the group set and groups that would be created for a folder called *New PDF Examples* that contained a folder called *Bats* and a folder called *Birds*.

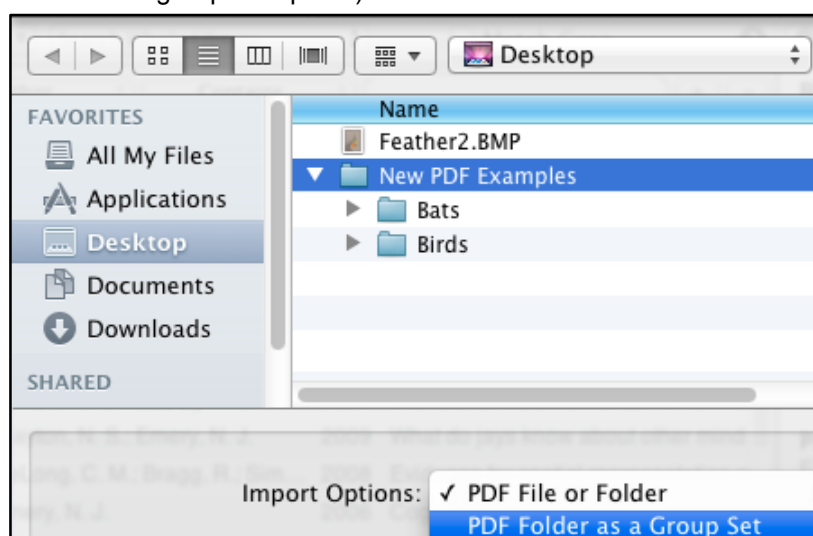


## 2.1.2 Importing a Folder of PDF Files on Macintosh

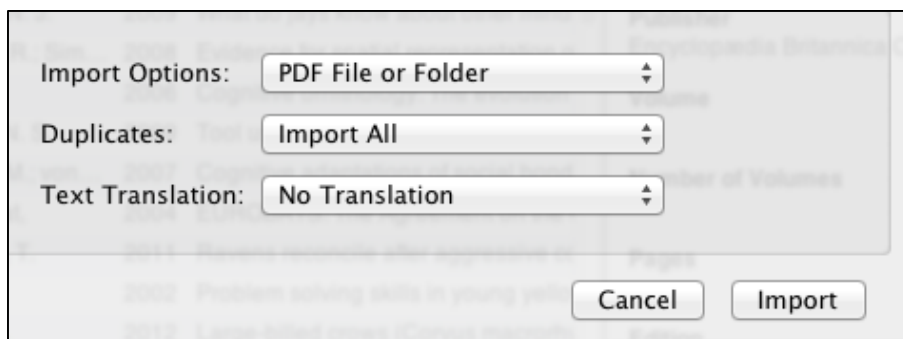
- Select **Import** from the **File** menu.



- 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.)

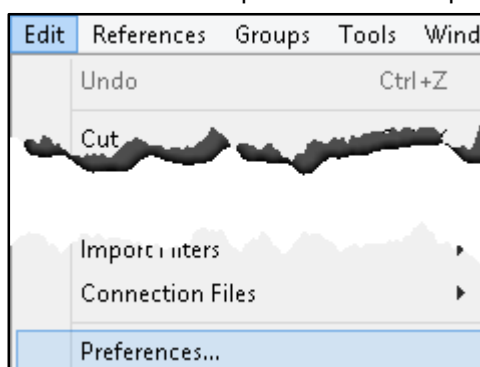


EndNote will import the PDFs and create the group set and groups. (Example not shown.)

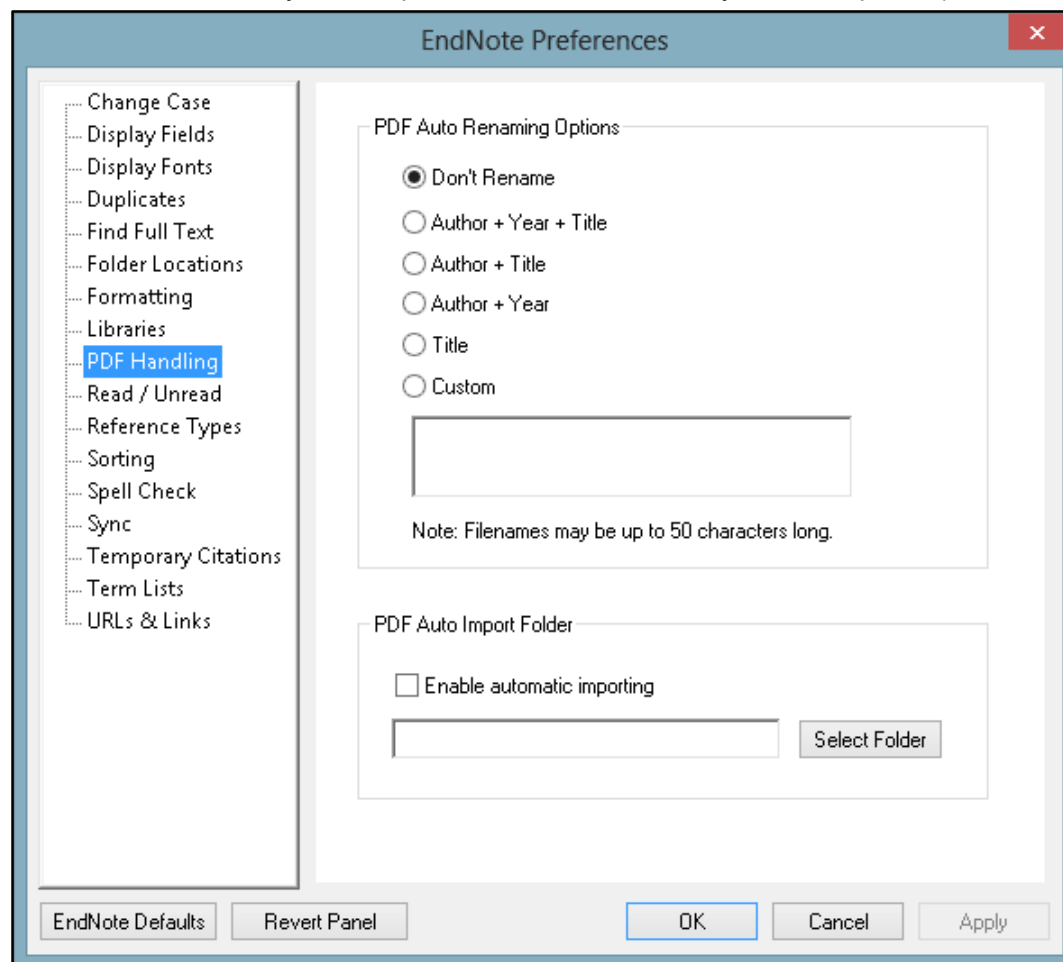
## 2.2 SETTING PDF HANDLING

### 2.2.1 Windows

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



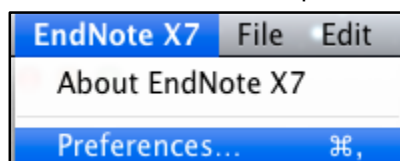
- Click the **PDF Handling** option in the preferences panel to see the window below. Here you can set automatic renaming options for PDFs you import or set a “watched” automatic importing folder. Any PDF added to the automatic importing folder will be imported into the EndNote library. Click the **OK** 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.

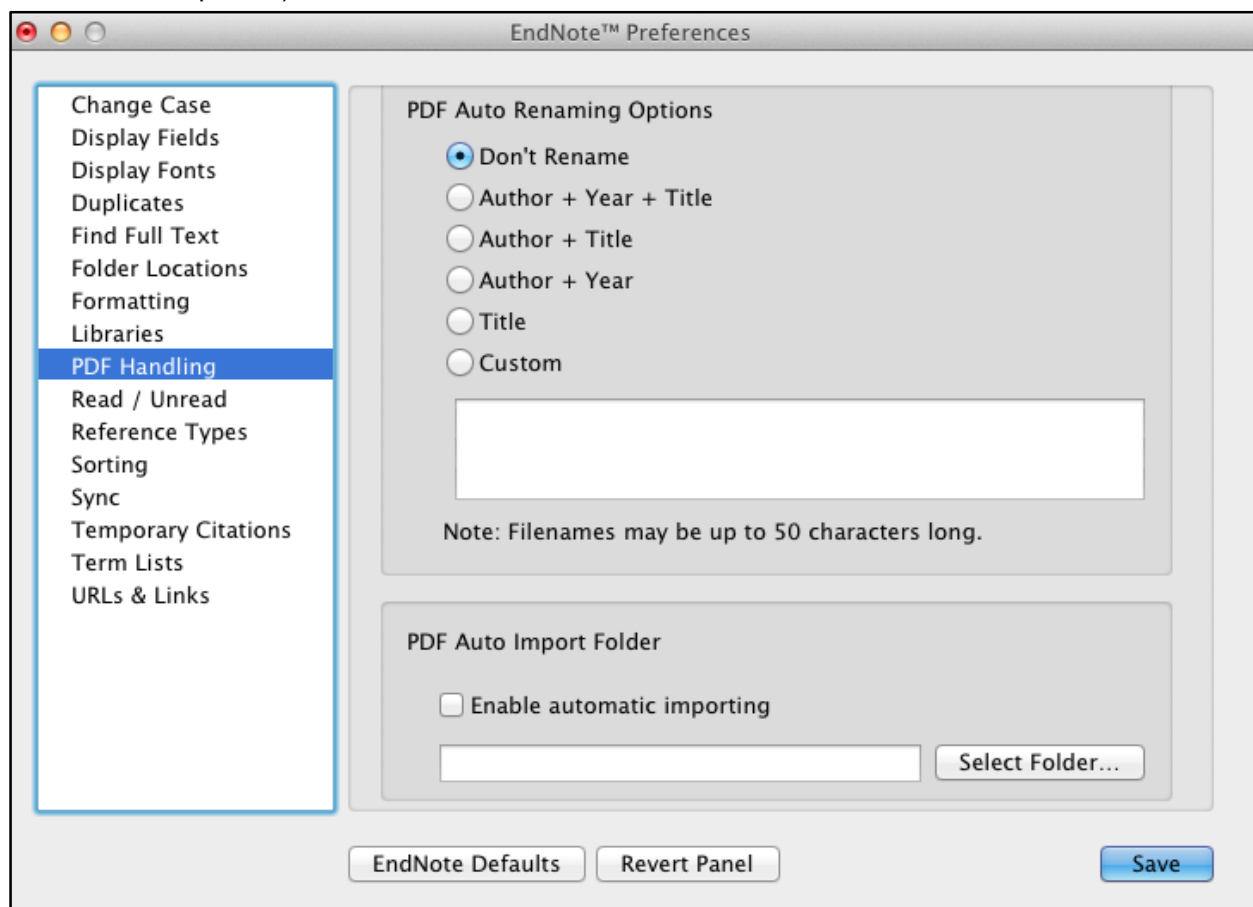
## 2.2.2 Macintosh

- Select **Preferences** from the **EndNote X7** 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 **Save** button when you have finished selecting your options, then close the window. (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.)



## 3 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.

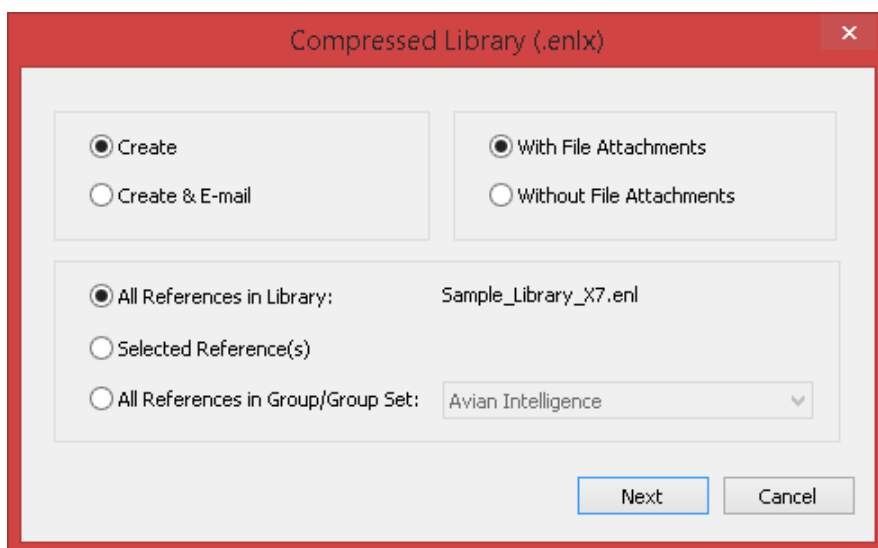
Whether you are upgrading from EndNote basic (online only, with a limited feature set) and merging that library with your desktop library, or creating an online library for the first time, you need to start by setting up EndNote Sync to keep all your references and custom groups up to date on both the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

### 3.1 SET UP ENDNOTE SYNC

#### 3.1.1 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 5.4 for more information.

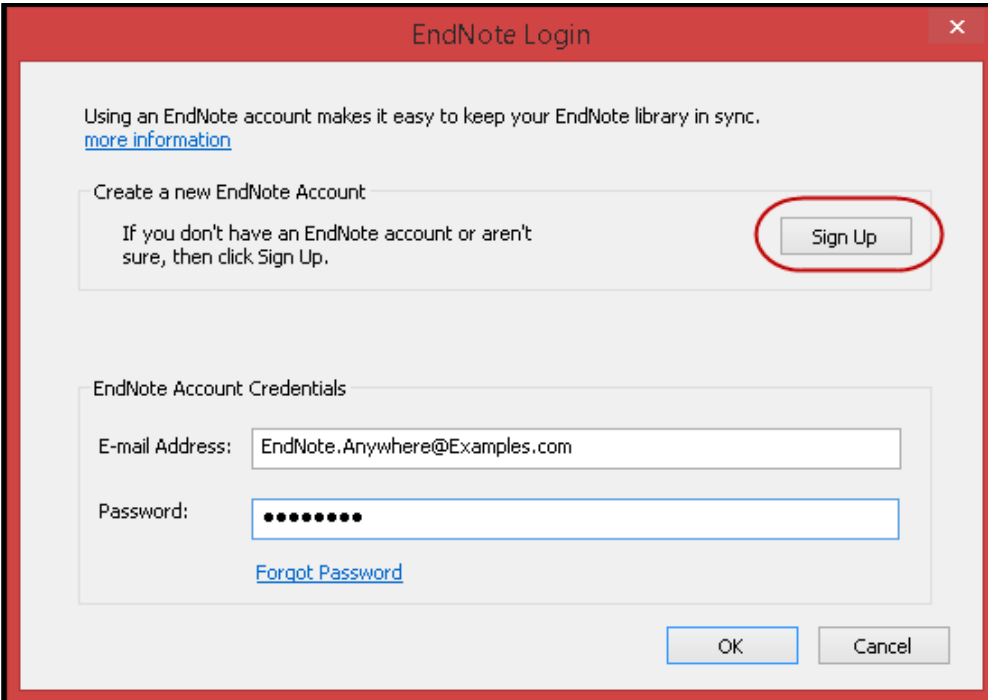
### 3.1.2 EndNote Sync

- 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: 

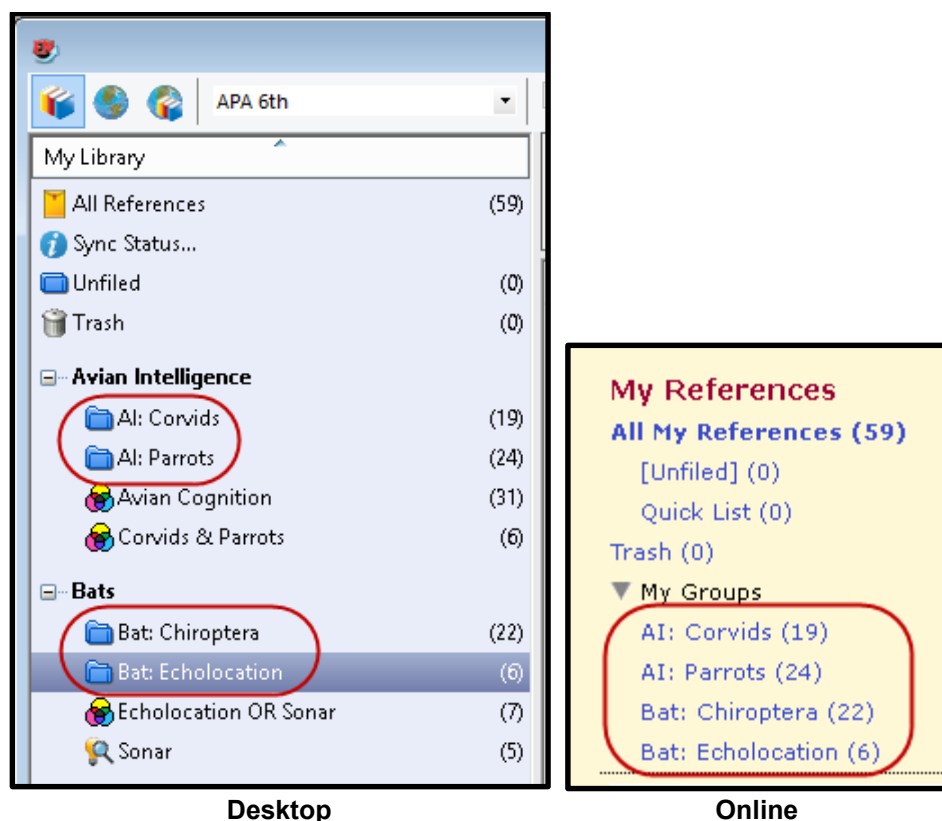
- If you already have an EndNote online or basic account, use that account's logon information, as in the example shown below. If you do not have an EndNote online account, you can create one by clicking the **Sign Up** button (circled below).



The image shows the 'EndNote Login' dialog box. It has a red title bar with the text 'EndNote Login' and a close button. The main content area is white. At the top, it says 'Using an EndNote account makes it easy to keep your EndNote library in sync.' followed by a blue link '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 which is circled in red. Below that is a section titled 'EndNote Account Credentials' with two input fields: 'E-mail Address' (containing 'EndNote.Anywhere@Examples.com') and 'Password' (containing seven dots). There is a blue link 'Forgot Password' 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 custom groups, so there may be duplicates and some library cleanup 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.***
- Smart Groups and Combined Groups (Groups from Groups) will not synchronize. If you sync to a second desktop computer, smart groups can be exported from the first computer and then imported into a second (or third) computer using the Smart Group Import/Export plug-in. You can find this plug-in and instructions online at <http://endnote.com/kb/126586>. Combined groups will need to be recreated on the new computer.

- 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.



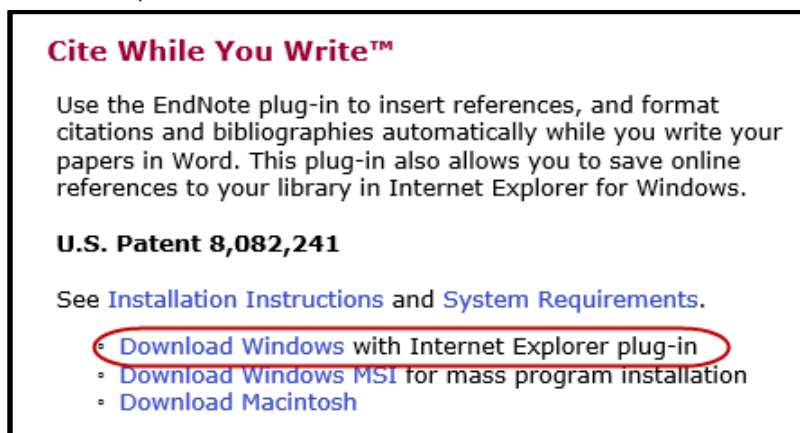
- Although it is possible to create an EndNote online account and not synchronize it to an EndNote desktop library, syncing will allow you to easily keep the same set of references in both libraries.
- After syncing an EndNote library, you can begin sharing groups to collaborate with others. See section 5.2 for more information on this.

## 3.2 INSTALLING THE INTERNET EXPLORER PLUG-IN

### 3.2.1 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.

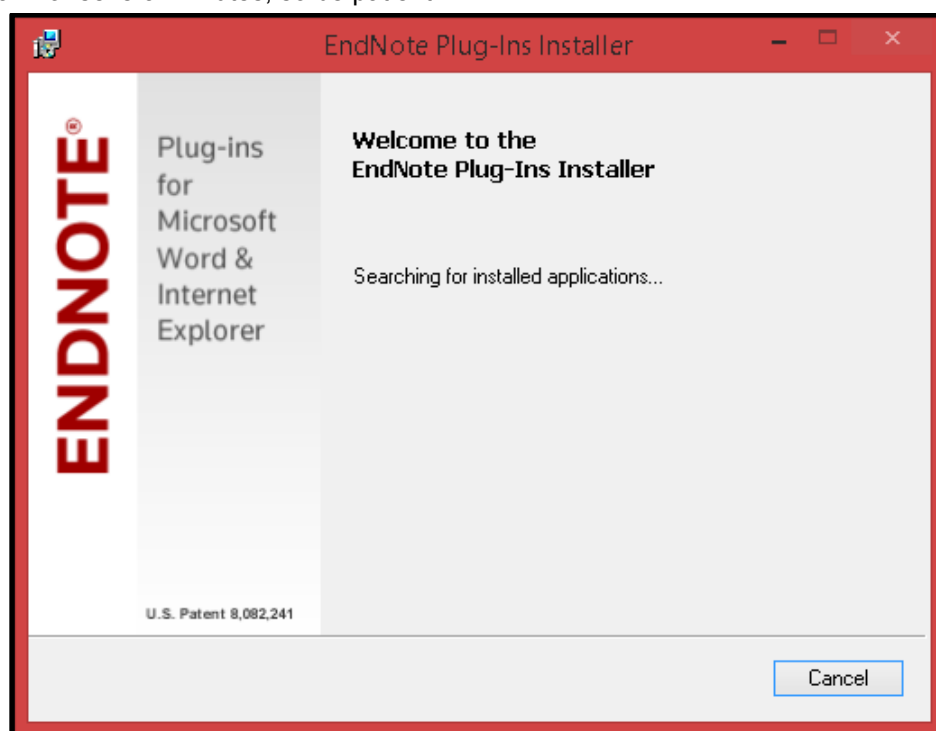
- Select **Download Windows with Internet Explorer plug-in** under the **Cite While You Write** section (circled below).



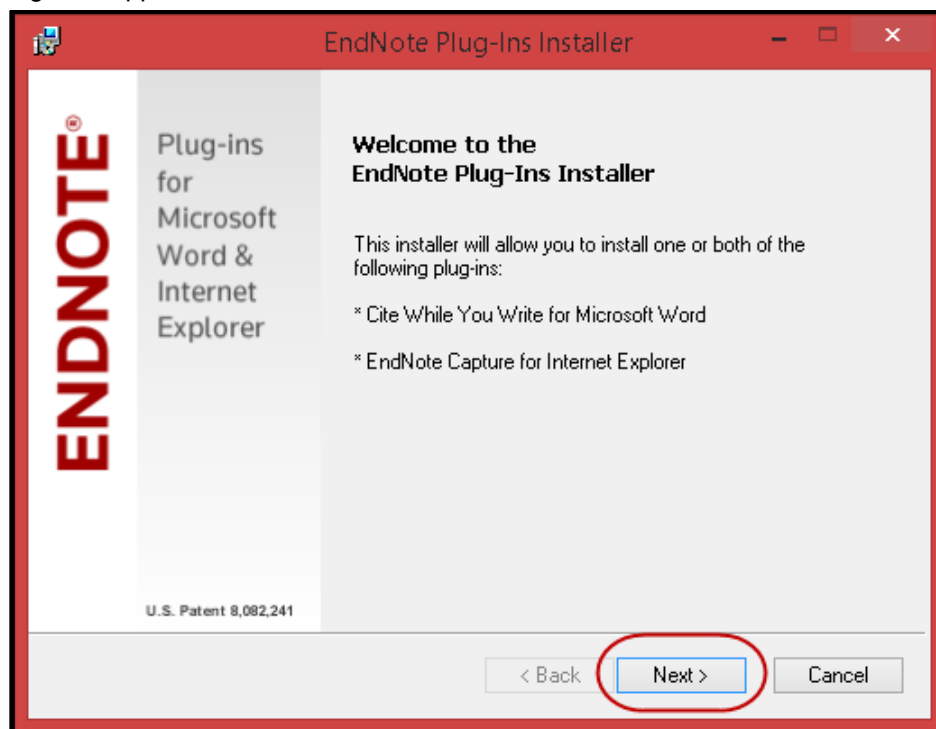
- Click the **Run** button to begin the installation. Internet Explorer is still open.



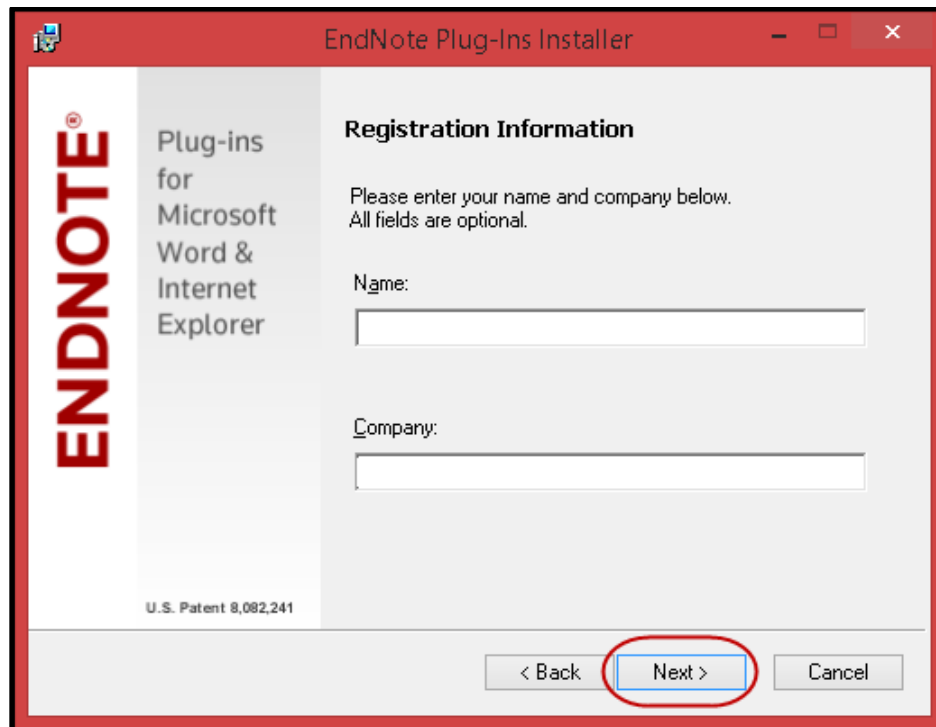
- You will see a message that the installer is searching for installed applications. This message may remain for several minutes, so be patient.



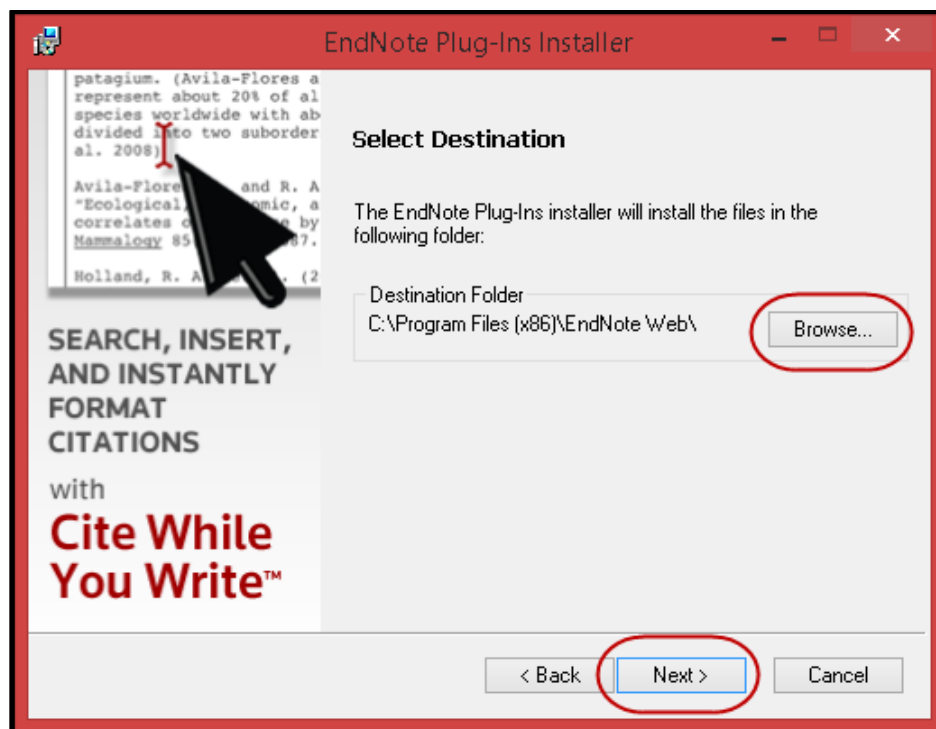
- When the installer has recognized the presence of both Internet Explorer and Microsoft Word, this message will appear. Click the **Next** button to continue.



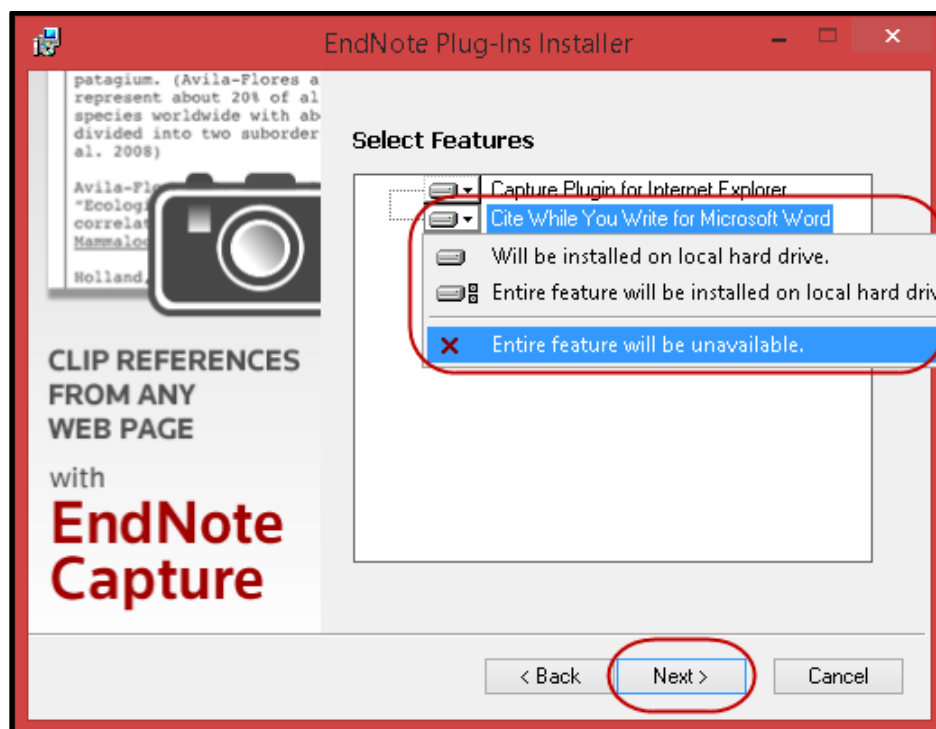
- Enter your name and company, if you wish, then click the **Next** button.



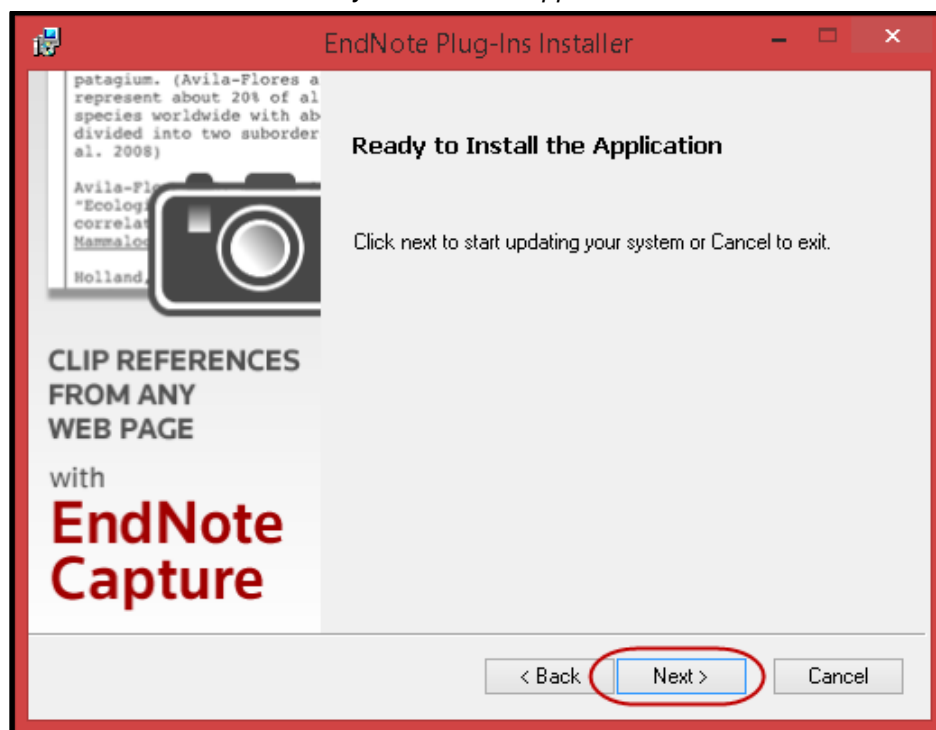
- You may change the destination folder the program will be installed in, if you wish, then click the **Next** button.



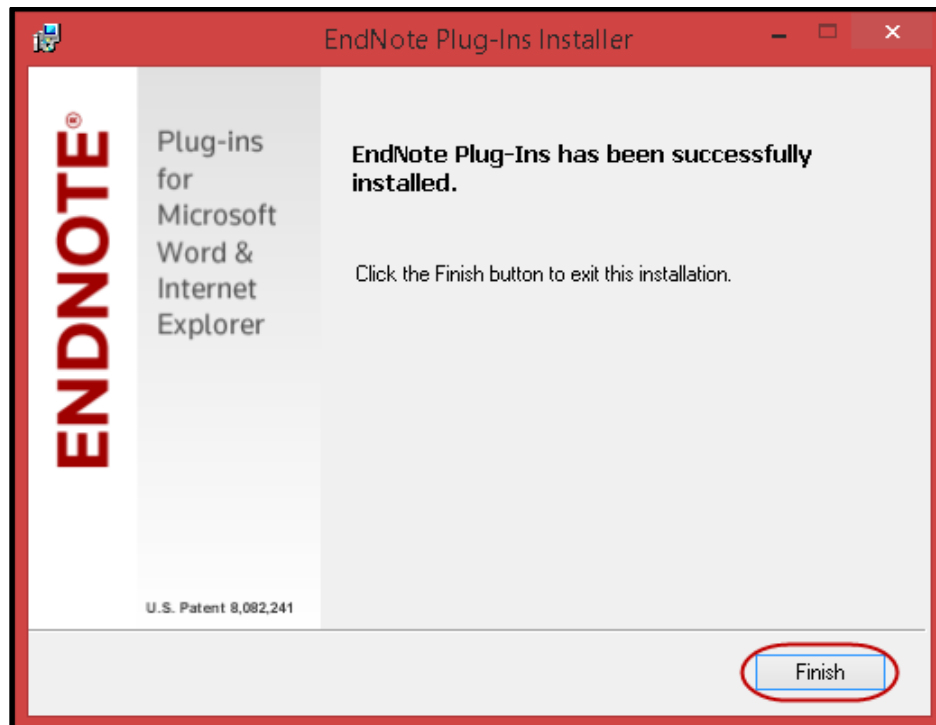
- Because you are using EndNote on both the desktop and online, you do not need the EndNote online Cite While You Write files. They are already contained in EndNote. From the drop-down **Cite While You Write for Microsoft Word** menu, select **Entire feature will be unavailable**. Then click the **Next**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

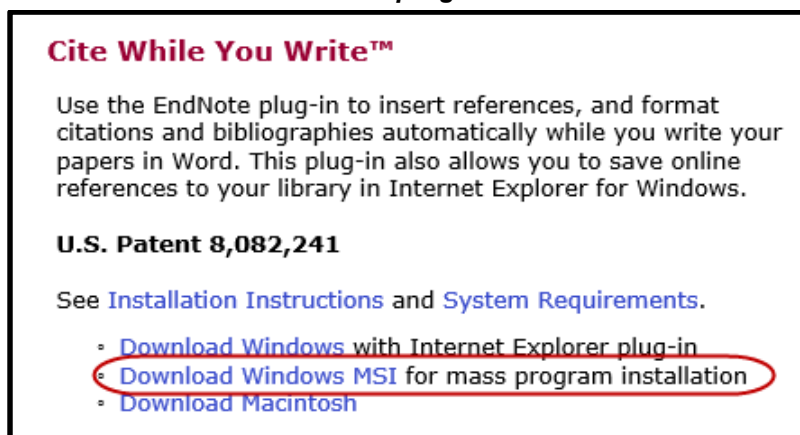




### 3.2.2 Installing from the Downloaded .msi File

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.



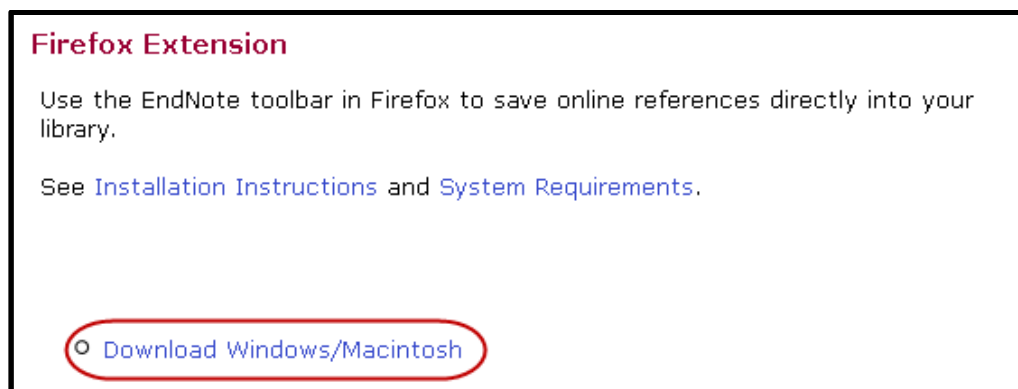
- Navigate to the location you saved the file and double-click the downloaded.msi file to begin the installation. You will see much the same buttons as above. Select the same options as above to finish the installation. Click [here](#) to go to the first installation screenshot example.

## 3.3 INSTALLING THE FIREFOX EXTENSION

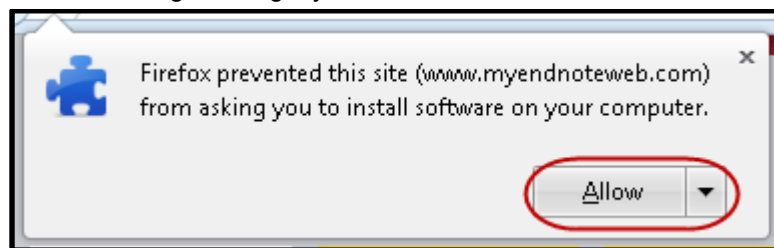
### 3.3.1 Windows and Macintosh

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

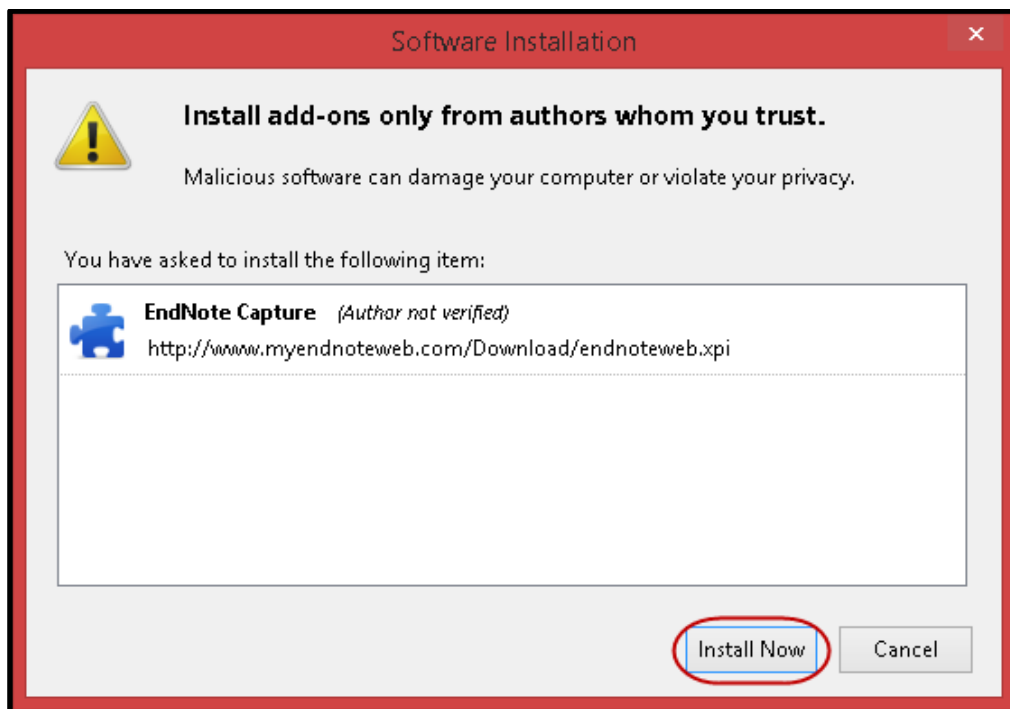
- In Firefox, on the EndNote online web site, select **Download Installers** from the **Options** tab or the bottom of any EndNote online screen.
- Select **Download Windows/Macintosh** under **Firefox Extension**.



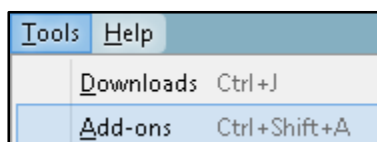
- When you see the message asking if you want to allow the installation, click **Allow**.



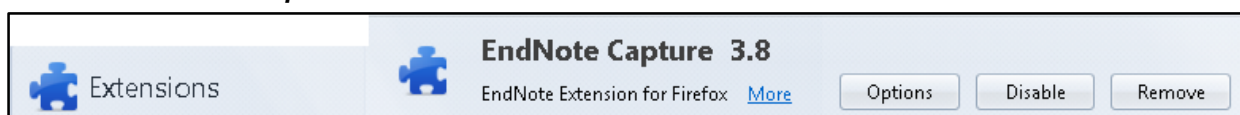
- When the warning below is received, click **Install Now**.



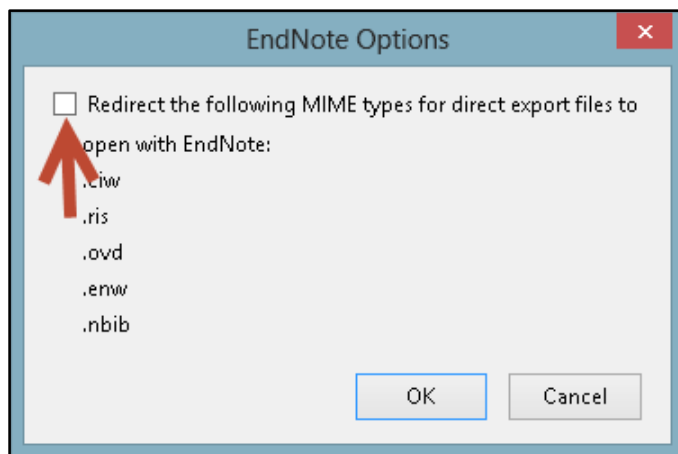
- You will be prompted to restart Firefox to complete the installation.
- After you have installed the EndNote online extension for Firefox, you will need to set the extension options/preferences to direct search results to EndNote desktop or online.
- Select **Add-ons** from the **Tools** menu whenever 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 **Options** button on Windows or the **Preferences** button on Macintosh.



- 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 in the chapter on direct export.



### 3.4 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.

### 3.5 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.

#### 3.5.1 Installing the Capture Bookmarklet

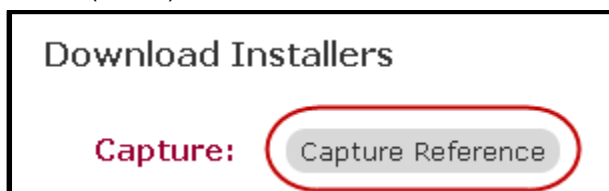
##### 3.5.1.1 Google Chrome and Safari

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

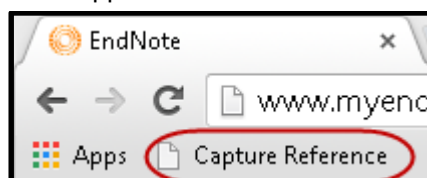
- Click the **Download Installers** link on the **Options** tab or the bottom of any EndNote online screen.



- 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).

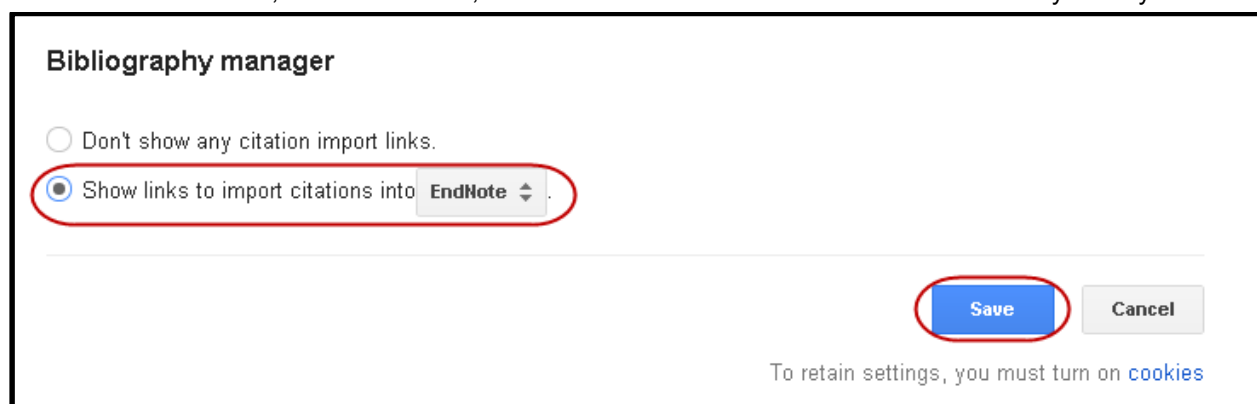


### 3.5.1.2 Safari on iPad

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.

## 3.5.2 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.



- 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.

### 3.5.2.1 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.

### 3.5.2.2 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.

### 3.5.2.3 Google Scholar Non-U.S. Sites Workaround

There is a known issue when using Capture with localized Google Scholar sites, for example, with the [scholar.google.com.au](http://scholar.google.com.au) site. If you find that Google Scholar redirects you to a local site after performing a search, you may need the following workaround to force Google Scholar to use the U.S. site for export.

- Perform your search.

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

- In the browser address bar, remove the local country identifier from the URL. As an example, [http://scholar.google.com.au/scholar?hl=en&q=sushi&btnG=&as\\_sdt=1%2C5](http://scholar.google.com.au/scholar?hl=en&q=sushi&btnG=&as_sdt=1%2C5) would become [http://scholar.google.com/scholar?hl=en&q=sushi&btnG=&as\\_sdt=1%2C5](http://scholar.google.com/scholar?hl=en&q=sushi&btnG=&as_sdt=1%2C5) after removing the “au” for Australia. (Highlighting added to show difference.)
- Click the **Capture** button.

### 3.5.3 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.

#### 3.5.3.1 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.)

### 3.5.3.2 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.

Go to EndNote Close

**Capture New References**

To: ☒ my.endnote.com ☐ EndNote

Groups: ☐ Sushi  
☐ New Group

**Capture**

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

THOMSON REUTERS

- 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

**20 references were captured successfully.**

Please wait while your request is processed.

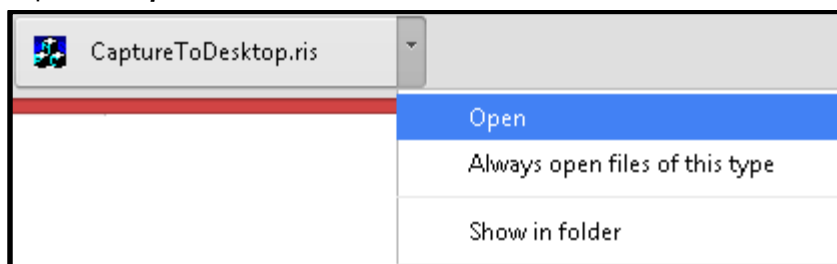
**Download** If the "Download" process does not start automatically, click "Download"

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

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- 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 1.3.4.

### 3.6 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.

**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: ☐ Sushi ☐

[Back to top](#)

Save to ☒ my.endnote.com ☐ EndNote

- Select the option to save it **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:

Author:

Title:

Year:

Journal:

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.



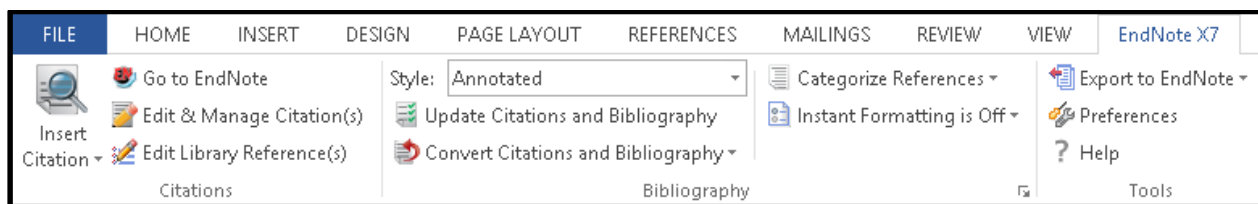
## 4 CITE WHILE YOU WRITE

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.

### 4.1 CITE WHILE YOU WRITE IN MICROSOFT WORD ON WINDOWS

#### 4.1.1 Installing the Cite While You Write Tools

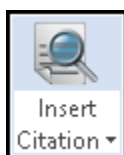
When you install EndNote it will automatically install files into a common program folder, allowing EndNote and Word to communicate and enabling Cite While You Write (CWYW). In Word 2007, 2010, or 2013 you will see a tab on the ribbon, similar to that shown below. (Note: It is best to close all other 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.)



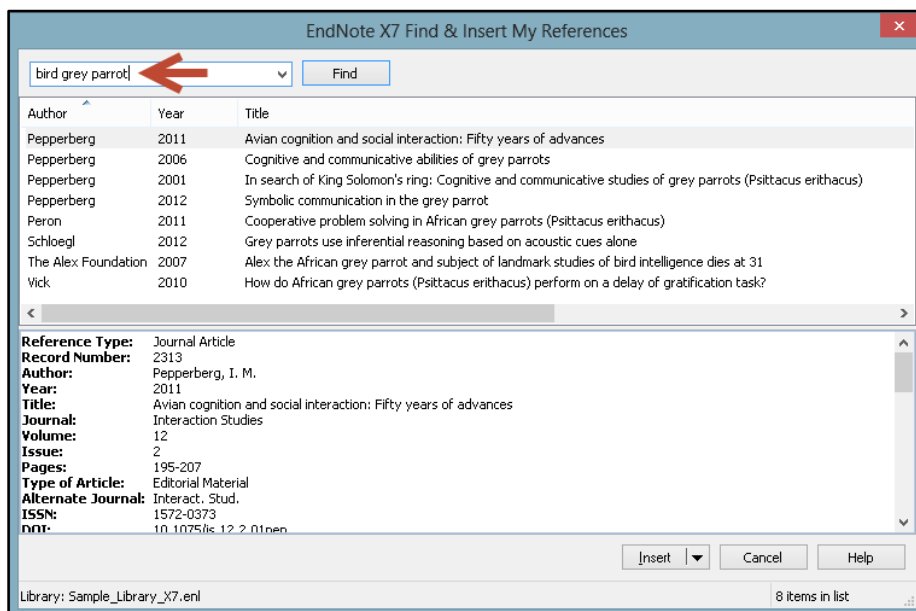
Below is information on using the Cite While You Write tools that you will need on a day-to-day basis.

#### 4.1.2 Adding Citations to a Document Using Insert Citation

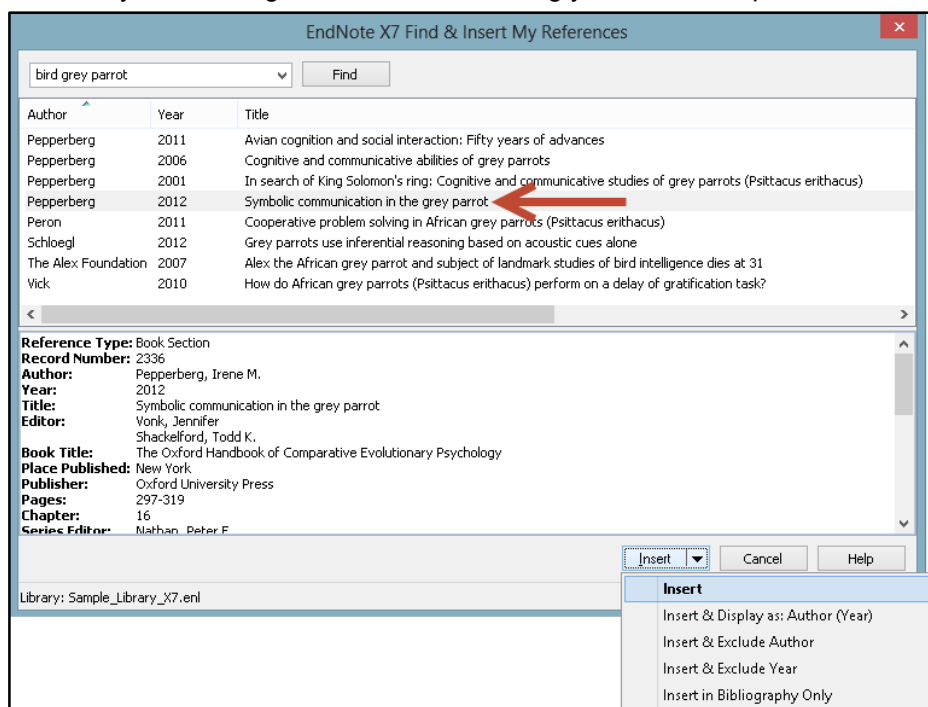
- Click the magnifying glass in the top half of the **Insert Citation** button on the EndNote tab in Word to open the *Find & Insert My References* window.



- 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.



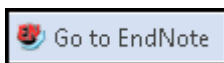
- Next, select (highlight) the reference(s) you want to insert. When you select a single reference, you will see the details for that reference in the bottom part of the window, but details can be shown for only a single reference. However, you can select multiple references for insertion by holding 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.

### 4.1.3 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.



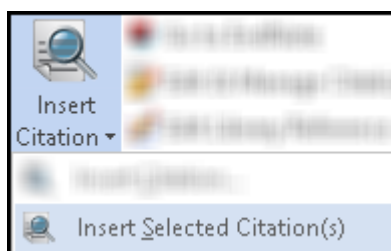
- In EndNote, select (highlight) the references you want to insert. You have two choices for how you insert them in the document.
  - You can insert them in the document from EndNote using the first button of the set shown below, **Insert Citation**. (Note this is a different command than the *Insert 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**.



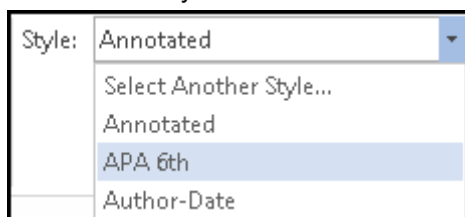
- If you returned to Word to insert the selected citations, click the bottom part of the **Insert Citation** button, then select **Insert Selected Citation(s)** from the drop-down list.



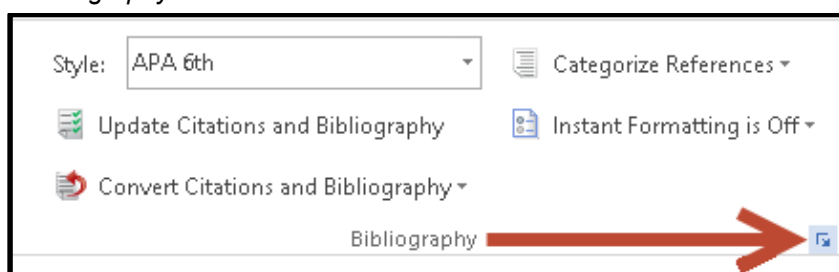
Your references will be inserted in the document and instantly formatted.

### 4.1.4 Selecting the EndNote Style for Your Citations and Bibliography

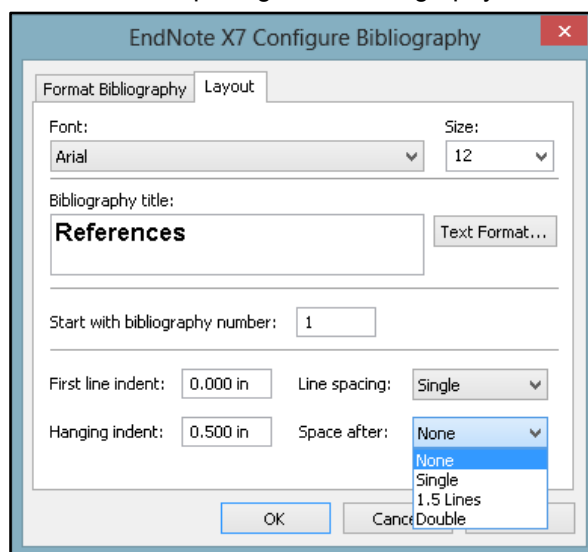
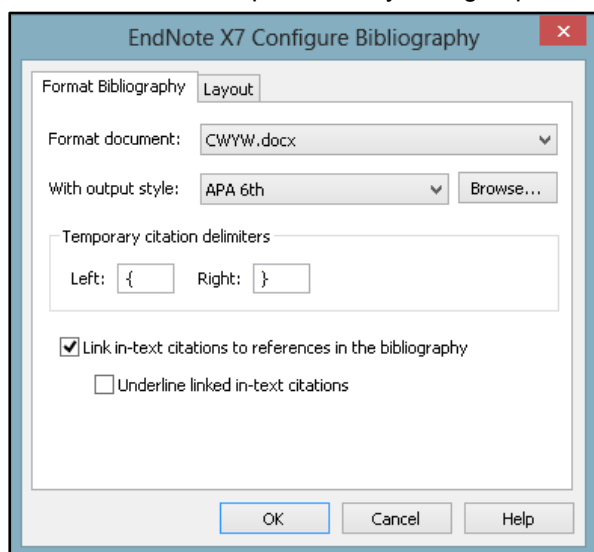
- You can select your preferred style from the drop-down style list as shown below, or select the **Select Another Style** option to see the list of EndNote styles available on your computer. (Note that a typical installation of EndNote only installs a list of popular styles. You can perform a custom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



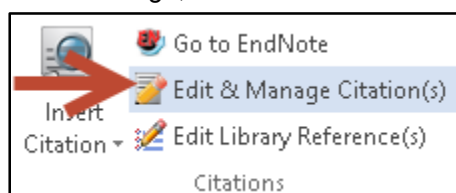
- The two tabs in the *Configure Bibliography* window provide options for changing the style, adding, removing, or formatting hyperlinks between citations and their matches in the bibliography, adding a centered title above the bibliography, changing the font used for the bibliography, and more. Select 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.



#### 4.1.5 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.)

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

Edit Citation

Reference

Formatting: Default

Prefix:

Suffix:

Pages:

Tools

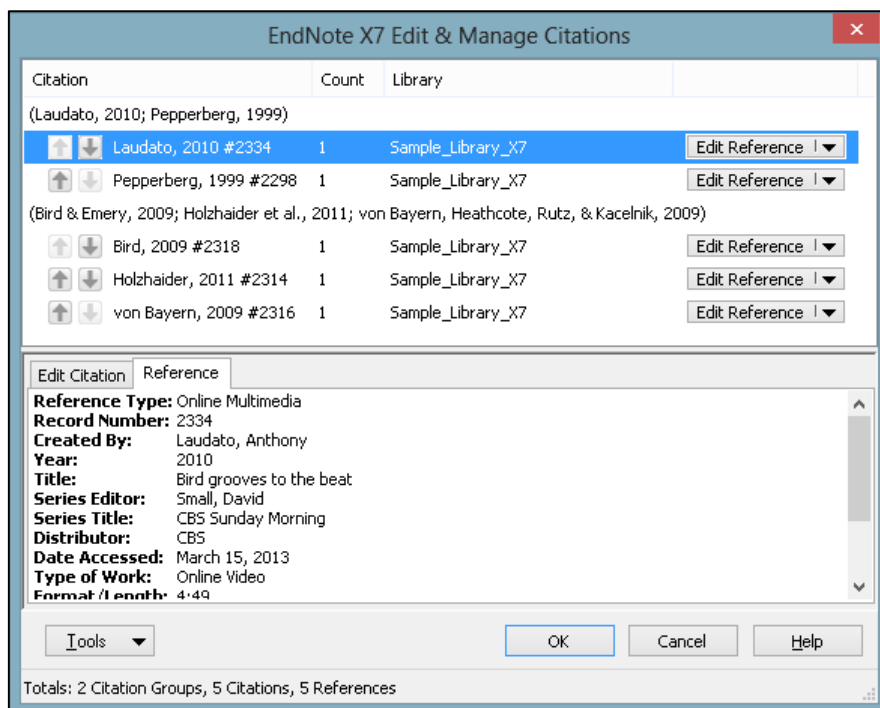
OK

Cancel

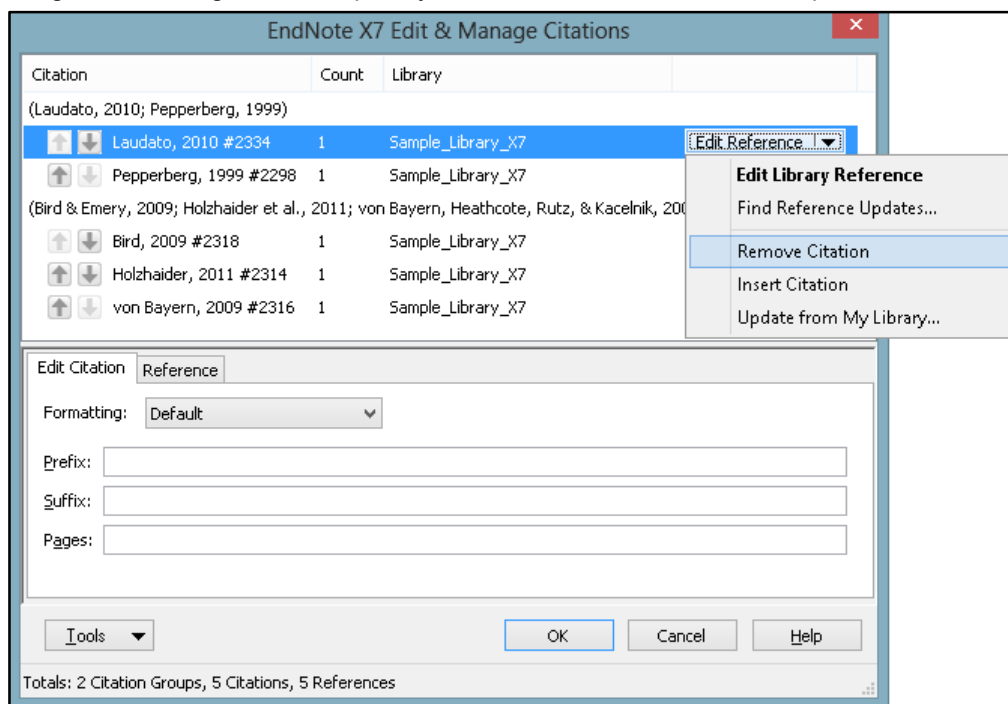
Help

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.



- 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.



## 4.2 CITE WHILE YOU WRITE IN MICROSOFT WORD ON MACINTOSH

### 4.2.1 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.

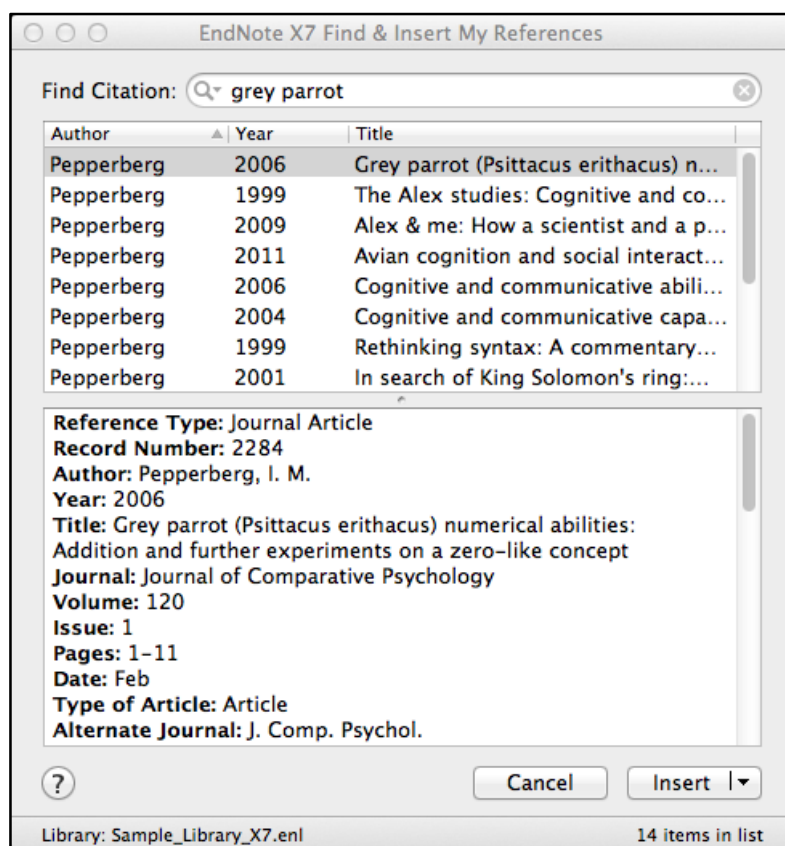
Below is information on using the Cite While You Write tools that you will need on a day-to-day basis.

### 4.2.2 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.

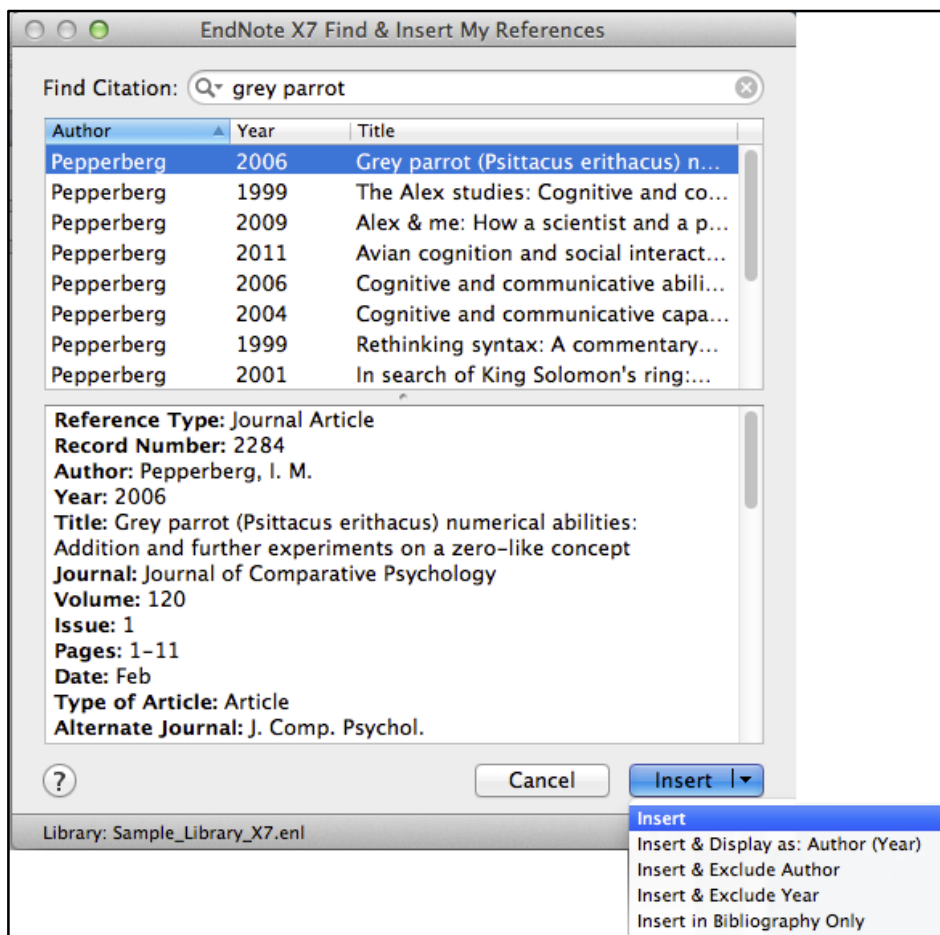


- In the *Find & Insert My References* window that appears, enter your search terms and press the **Enter/Return** key on your keyboard to bring up a set of references that contain those search terms. The terms can be anywhere in the EndNote record, but all the terms must be present in the same record.





- 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.

#### 4.2.3 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.



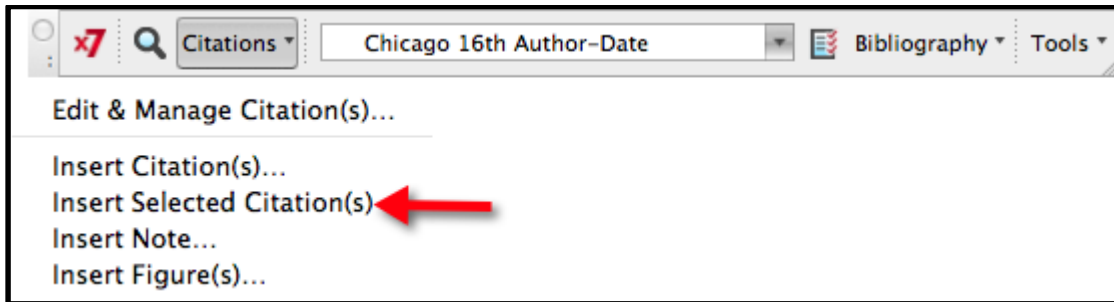
- In EndNote, select (highlight) the references you want to insert. You have two choices for how you insert them in the document.
  - You can insert them in the document from EndNote using the first button of the set shown below, **Insert Citation**. This will insert the references wherever your cursor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



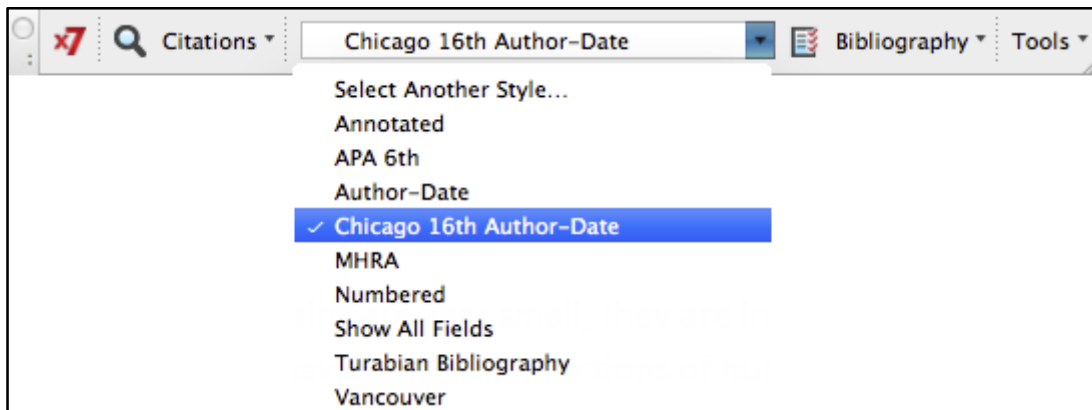
- If you returned to Word to insert the selected citations, click the **Citations** button, then select **Insert Selected Citation(s)** from the drop-down list.



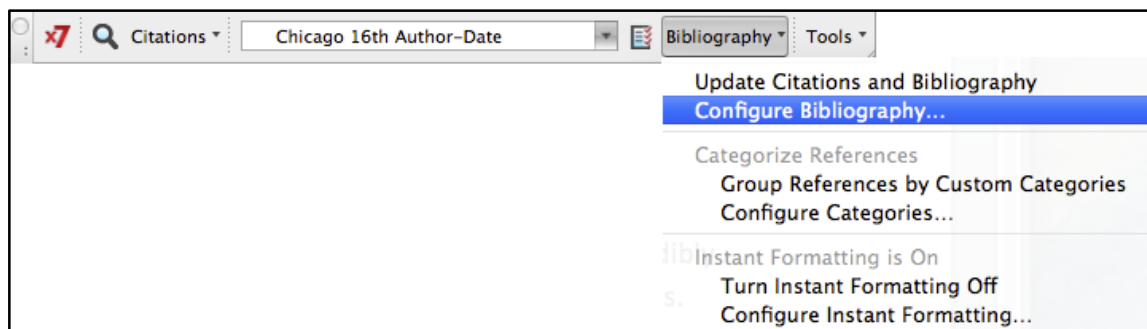
- Your references will be inserted in the document and instantly formatted.

#### 4.2.4 Selecting the EndNote Style for Your Citations and Bibliography

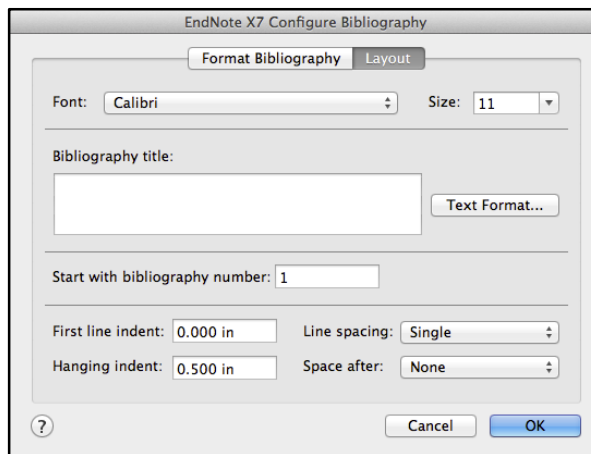
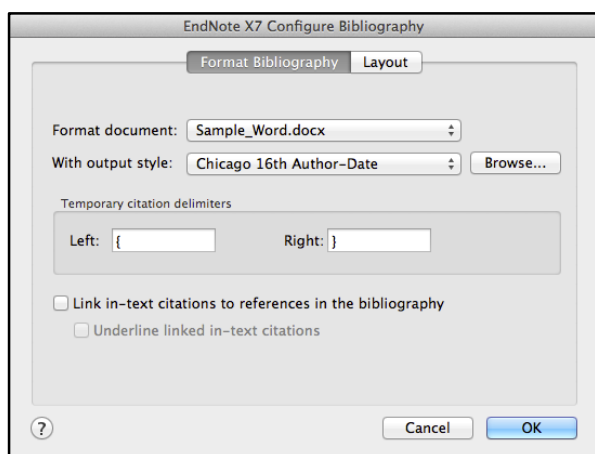
- To select the style for your citations and bibliography, select your preferred style from the drop-down style list as shown below, or select the **Select Another Style** option to see the list of EndNote styles available on your computer. (Note that a typical installation of EndNote only installs a 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.



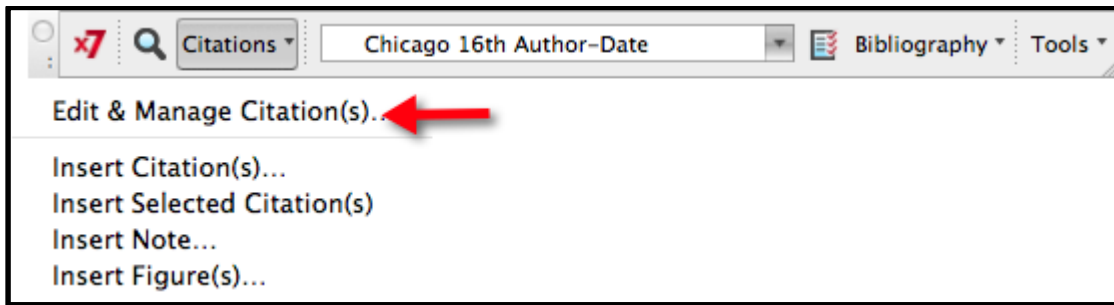
- The two tabs in the *Configure Bibliography* window provide options for changing the style, adding, removing, or formatting hyperlinks between citations and their matches in the bibliography, adding a centered title above the bibliography, changing the font used for the bibliography, and more. Select 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.)



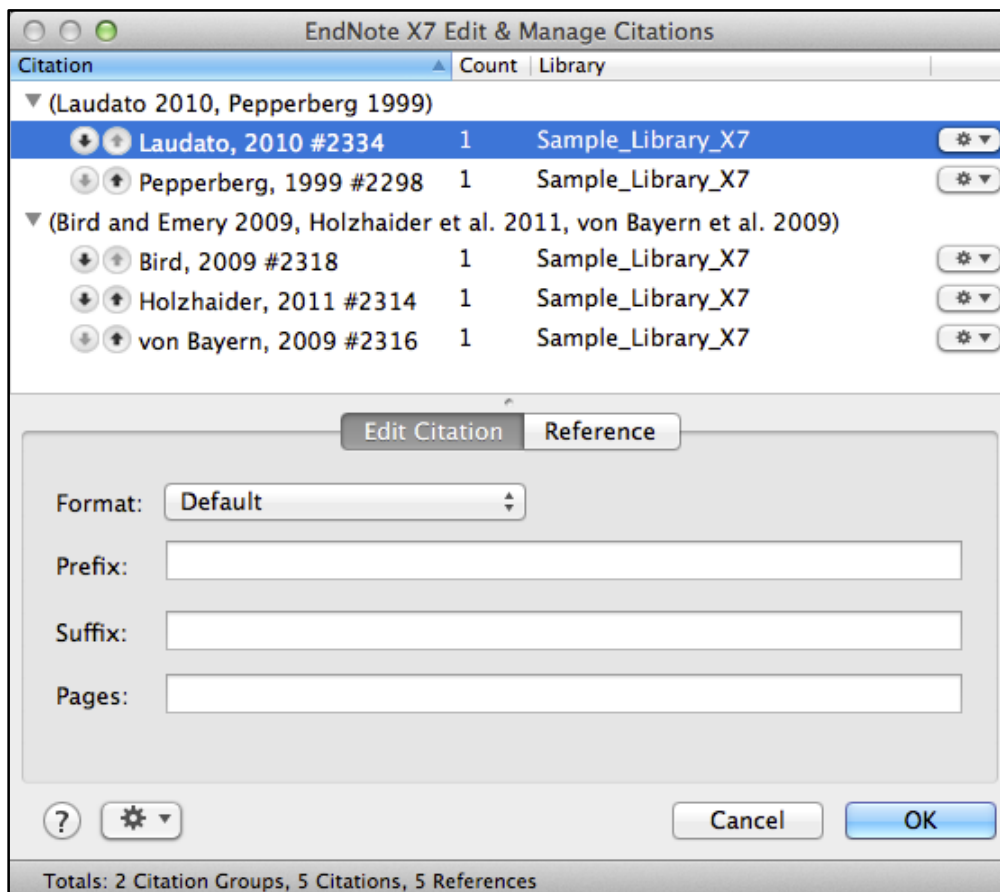
## 4.2.5 Editing Citations in the Document

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.

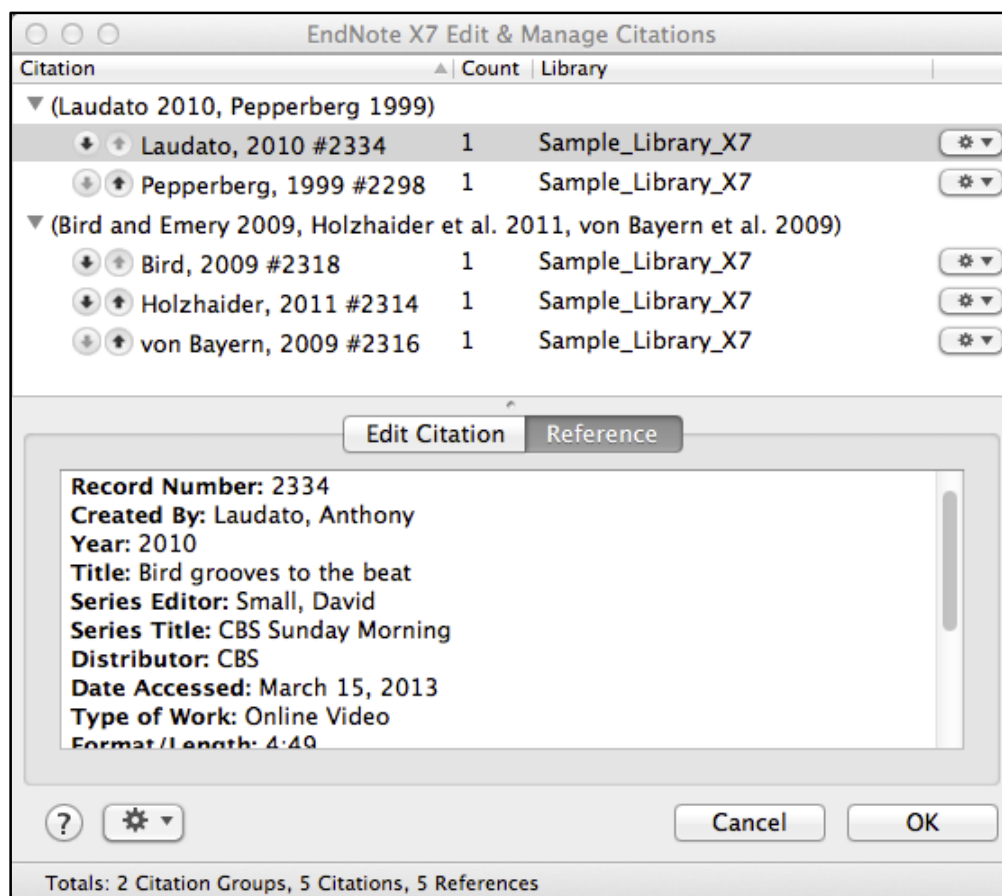
- Click on the citation you want to change, then click the **Citations** button and select **Edit & Manage Citations**.



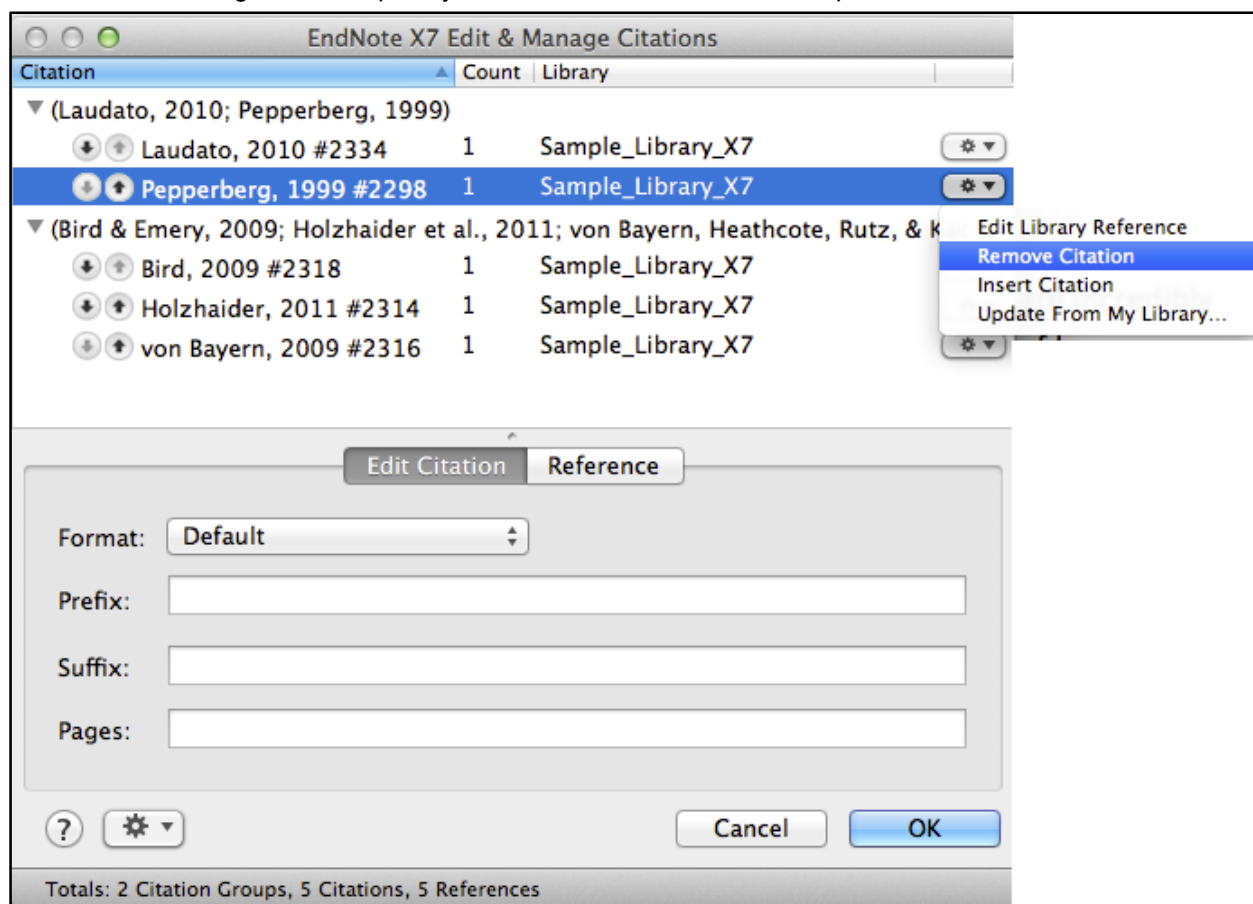
- In the *Edit & Manage Citations* window there are two tabs in the lower part of the window. The first tab, *Edit Citation* (shown below), contains fields where you can add prefix or suffix text to a citation, as well as page numbers for those styles that require them. There is also a drop-down *Format* 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.



## 5 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.

### 5.1 HOW NOT TO SHARE AN ENDNOTE LIBRARY

#### 5.1.1 Don't Put 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
- SkyDrive
- SugarSync

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

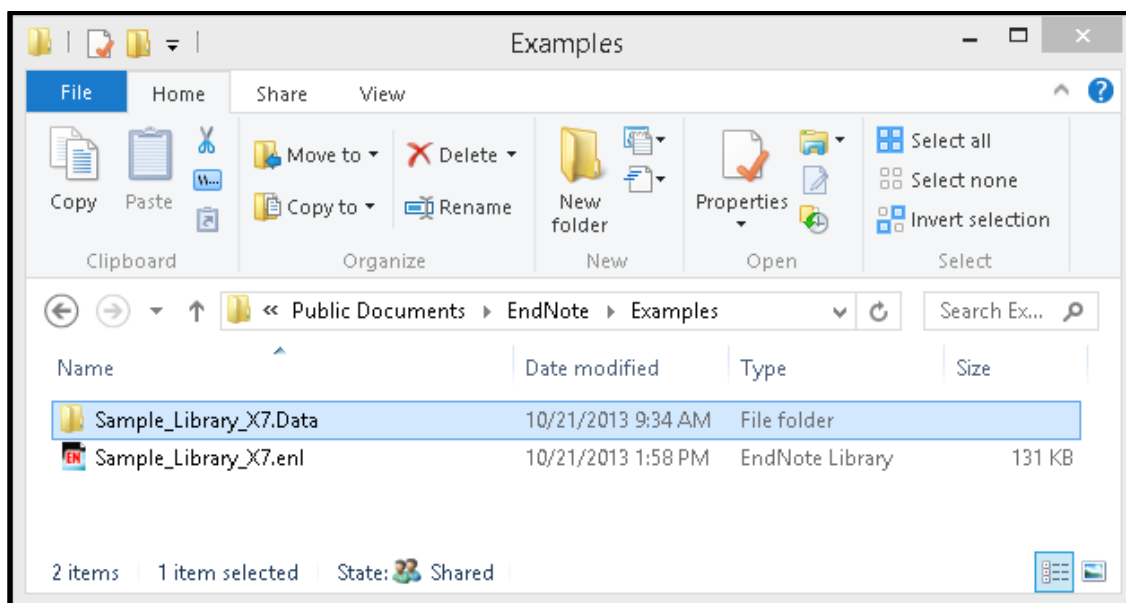
The reason these methods are inadvisable is that when you are working in EndNote, it is saving data to multiple files, and the data must be saved in a set sequence, as described above. When cloud services transfer that data, they may change the sequence of file saves. This eventually leads to library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

#### 5.1.2 Don't Put EndNote Libraries on Distant Network Servers

EndNote libraries with **read-write access** should not be stored on network drives outside of the building the database owner is located in. If the data must travel through the Internet, even within a company intranet or VPN network, latency issues can result in the packets of information arriving out of sequence on the distant server, causing corruption problems like those seen in cloud services. Ideally, the library should be kept on the owner's computer.

#### 5.1.3 Don't Send 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?

## 5.2 SHARE GROUPS IN ENDNOTE ONLINE

Our suggested method of sharing references is to have the owner of the references put them in a shared EndNote online group. With this method 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, much like a bank.

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 of such users to share references with them.

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




### 5.2.1 Creating an EndNote Online Library

Please see section 3 for information on setting up your EndNote online library if you have not done so already.

### 5.2.2 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 Parrots	24	<input type="checkbox"/>	Manage Sharing	Rename Delete
 AI: Corvids	19	<input checked="" type="checkbox"/>	Manage Sharing	Rename Delete
Bats: Chiroptera	22	<input type="checkbox"/>	Manage Sharing	Rename Delete
Bats: Echolocation	6	<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 and an arrow 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.

Manage Sharing for 'AI: Corvids'

0 E-mail Addresses

[Start sharing this group.](#)

- You will see the Window below.

**Add E-mail Addresses to 'AI: Corvids'**

Enter e-mail addresses. Use the Enter or Return key to separate addresses.

EndNote.Training@Examples.com

- OR -

Select a text file with e-mail addresses separated by commas.

Choose File No file chosen

---

☐ Read only ☒ Read & Write

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

Apply

[Close window.](#)

- Add the email address(es) for those you want to share the library 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.Training@Examples.com	<input type="radio"/>	<input checked="" type="radio"/>	Edit	Delete

[Add More](#)

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

### 5.2.3 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 notebook and pencil icon 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	Options
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.Anywhere@Examples.com

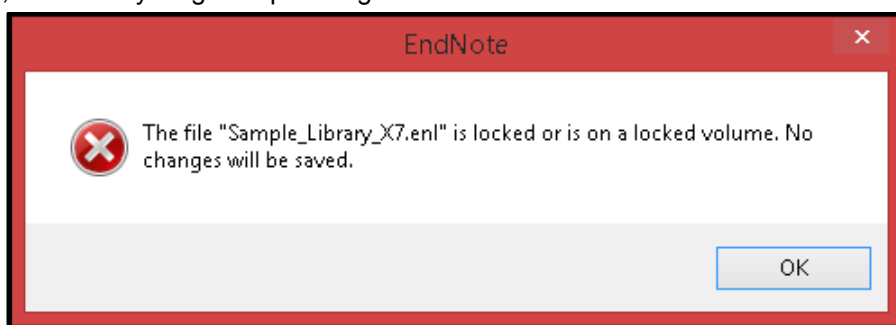
Note that groups and references that others share with you are not actually part of your library and will not sync to your EndNote library on the desktop.

### 5.3 PUT A READ-ONLY ENDNOTE LIBRARY ON A NETWORK DRIVE

If your group needs to share access to attachments as well as reference data, 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 because of Internet latency, much like the problems with cloud services. In other words, trying to keep your master library on a network drive could cause corruption in 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.



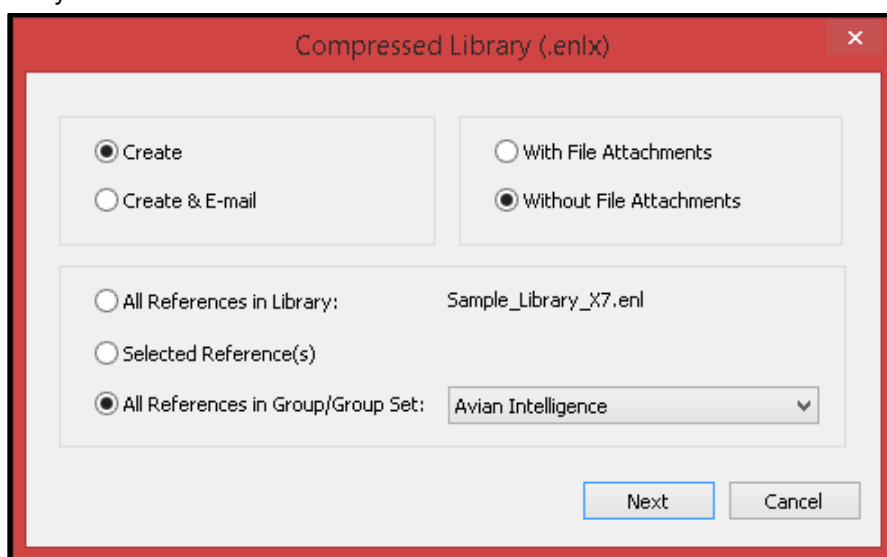
- The suggested “best method” for putting your read-only copy on the network drive is to first make a compressed library with all records and all attachments on your hard drive, then copy that file to the network location and open it there. It will uncompress to create the .enl file and .data folder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

### 5.4 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 or references are included, and whether or not attachments are included.

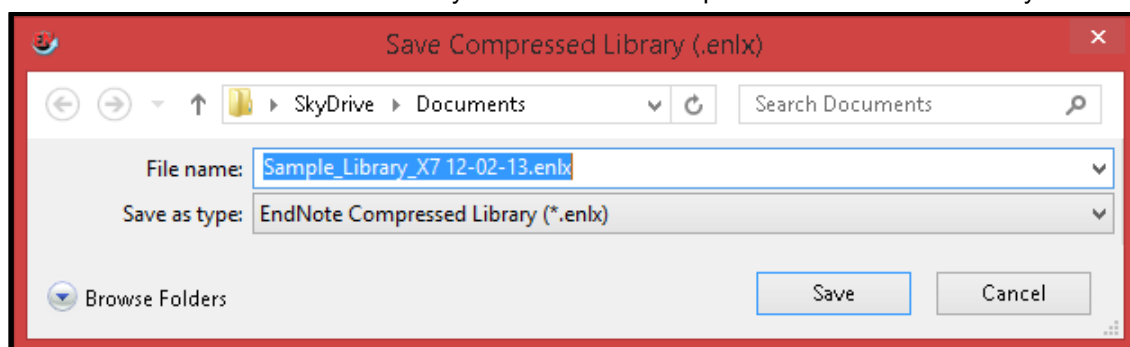
The disadvantage of this method is that users are not working with the same copy of the library. Each person would have their own copy of the library and changes to references could be made in each copy differently.

- 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 to the library name to help identify it later. Please note, again, that a compressed library can be saved to a SkyDrive folder, as in this example, but it cannot be opened and worked with in a SkyDrive folder. The library would need to be moved out of SkyDrive to be able to open it and work with it safely.



- Click the **Save** button to save your compressed library. Please note that a large library with many attachments may take awhile 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.

## 5.5 THE TRAVELING LIBRARY

### 5.5.1 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;jimpepper@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>information</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.

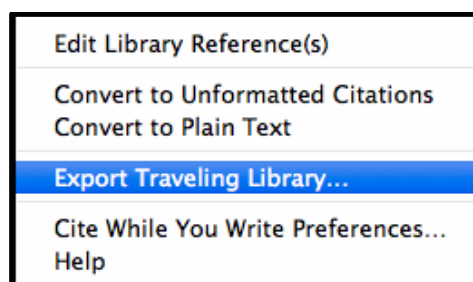
## 5.5.2 Exporting the Traveling Library

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

- On the 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.

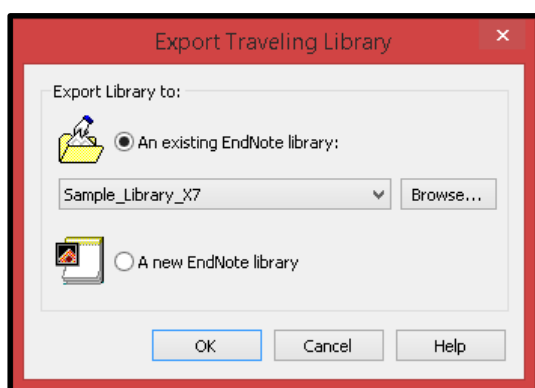


Windows

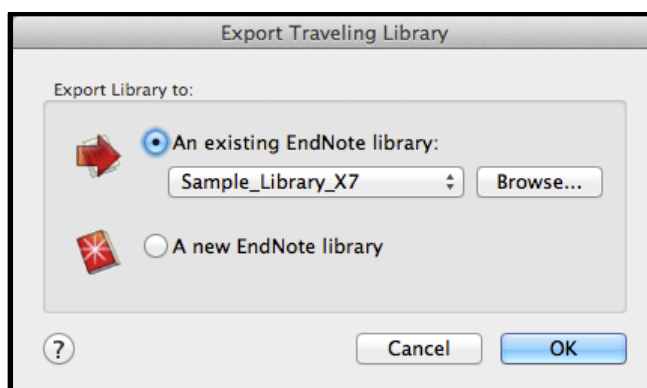


Macintosh

- 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.

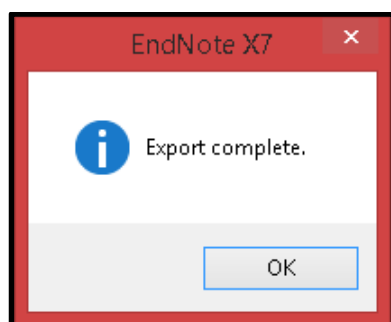


Windows

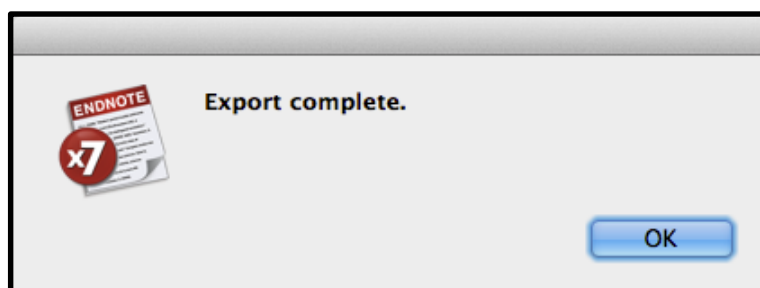


Macintosh

- 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

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.



## 6 CONVERTING FROM OTHER REFERENCING SOFTWARE

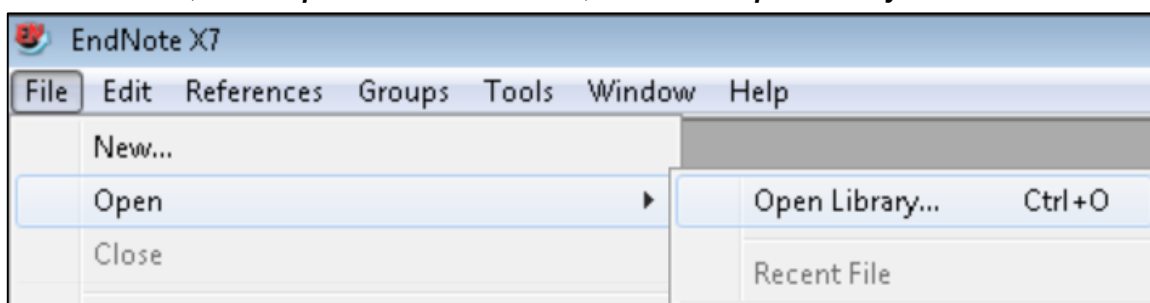
### 6.1 CONVERTING FROM REFERENCE MANAGER TO ENDNOTE

Converting a Reference Manager 11 or 12 database to an EndNote library is not difficult and requires no importing or exporting of text files. If you have customized your Reference Manager reference types and fields, you can even customize the mapping of those reference types and fields during the conversion process.

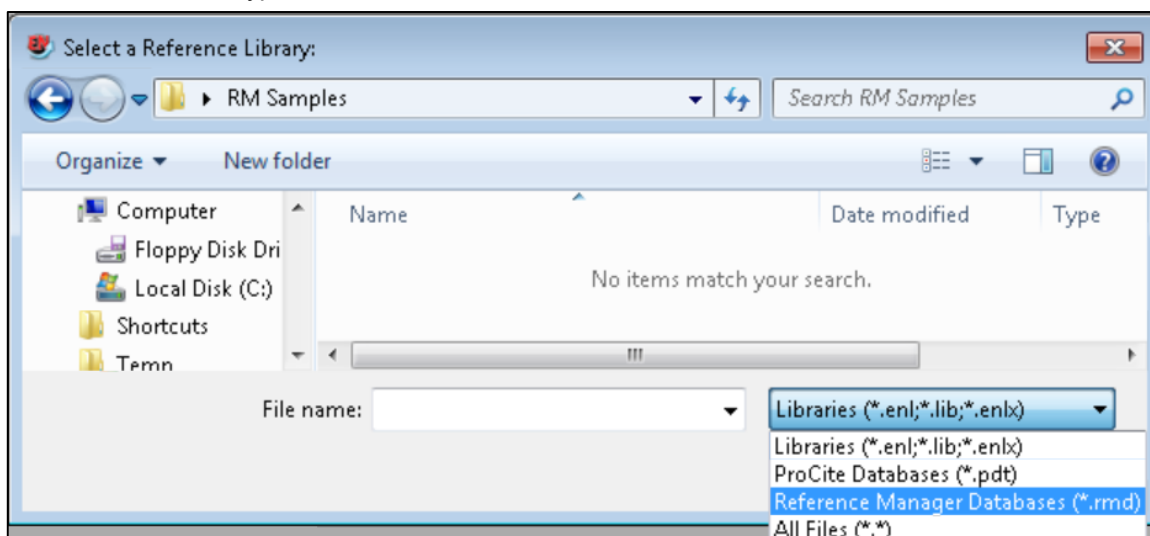
Note that the conversion process will make no changes to the original Reference Manager database.

#### 6.1.1 Converting the Reference Manager Database

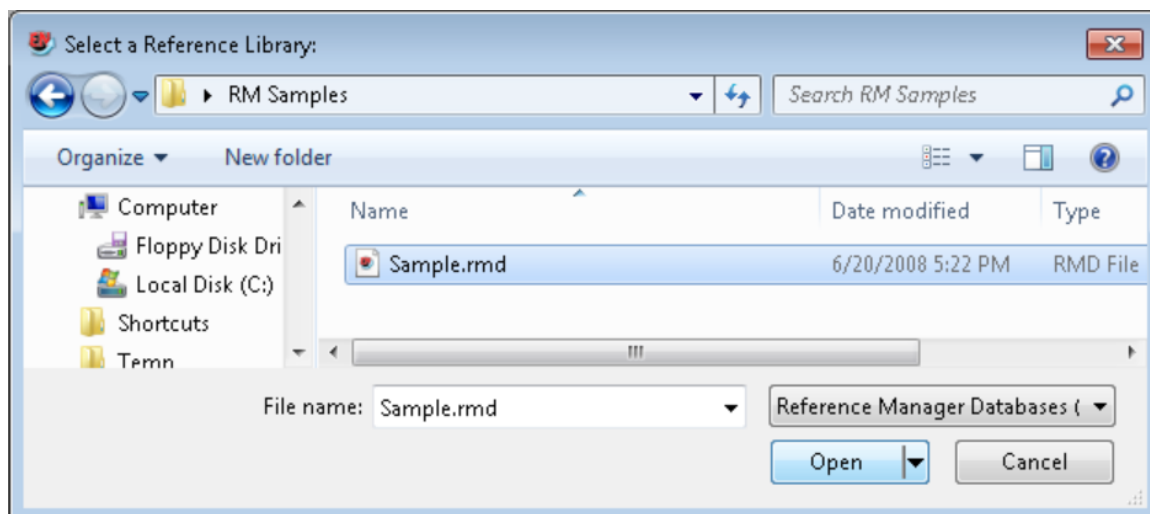
- In EndNote, select **Open** from the **File** menu, then select **Open Library**.



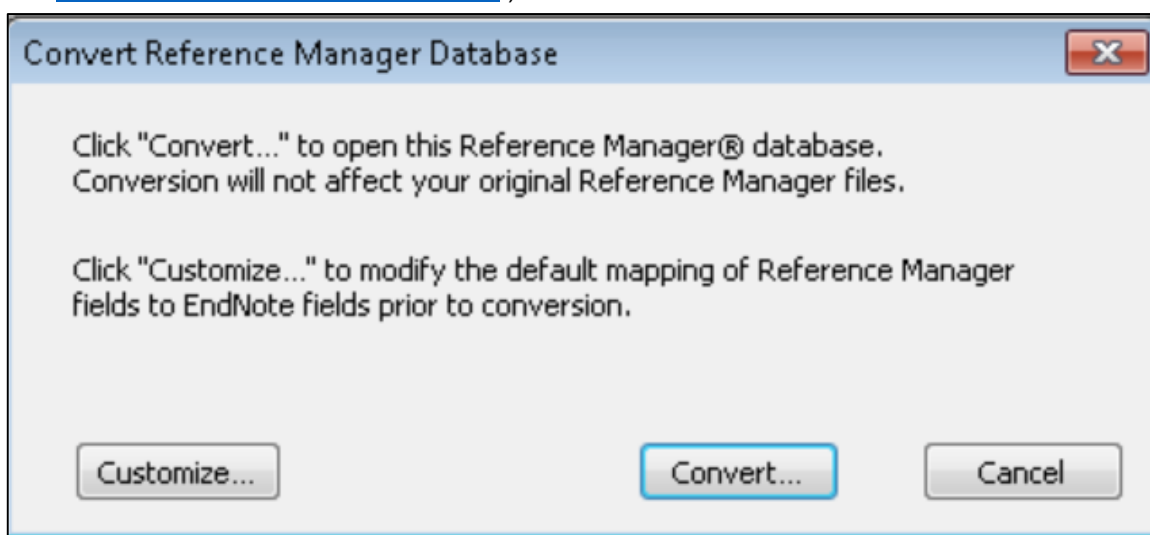
- In the *Select a Reference Library* window, navigate to the folder containing your Reference Manager database and select the **Reference Manager Databases (\*.rmd)** option from the drop-down list of file types.



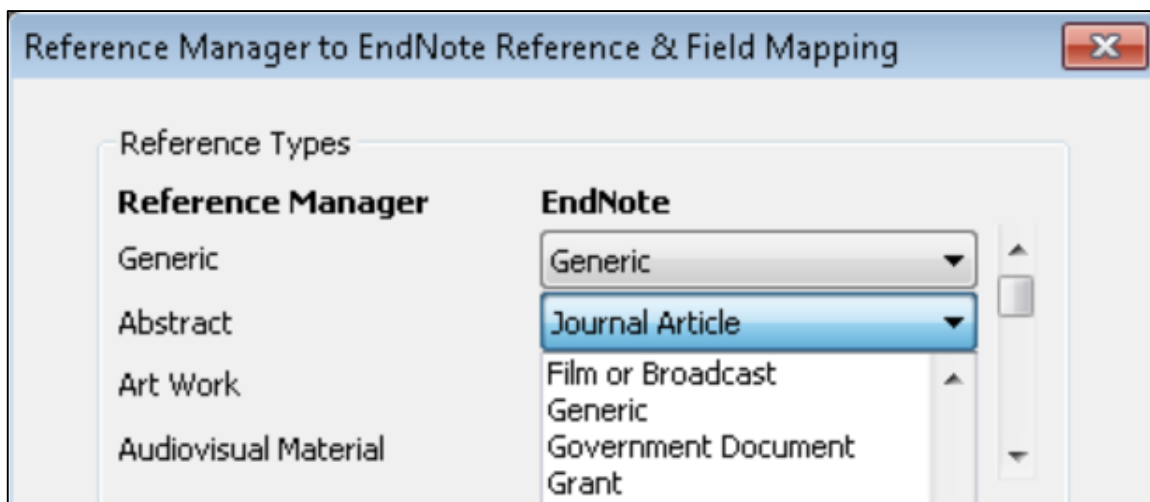
- You will now see the Reference Manager database in the folder. Select it, then click on the **Open** button.



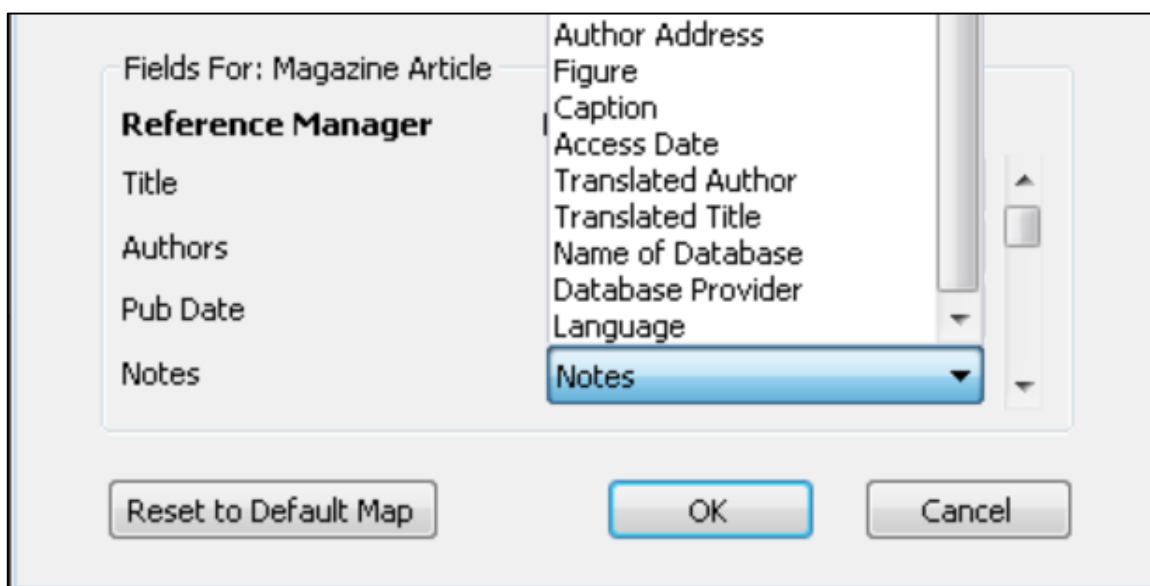
- If you have not customized any of your reference types or fields in Reference Manager, you can simply click the **Convert** button to convert the database. If you have customized your database, click the **Customize** button to customize the field mappings. ([Click here to continue with the uncustomized conversion instructions.](#))



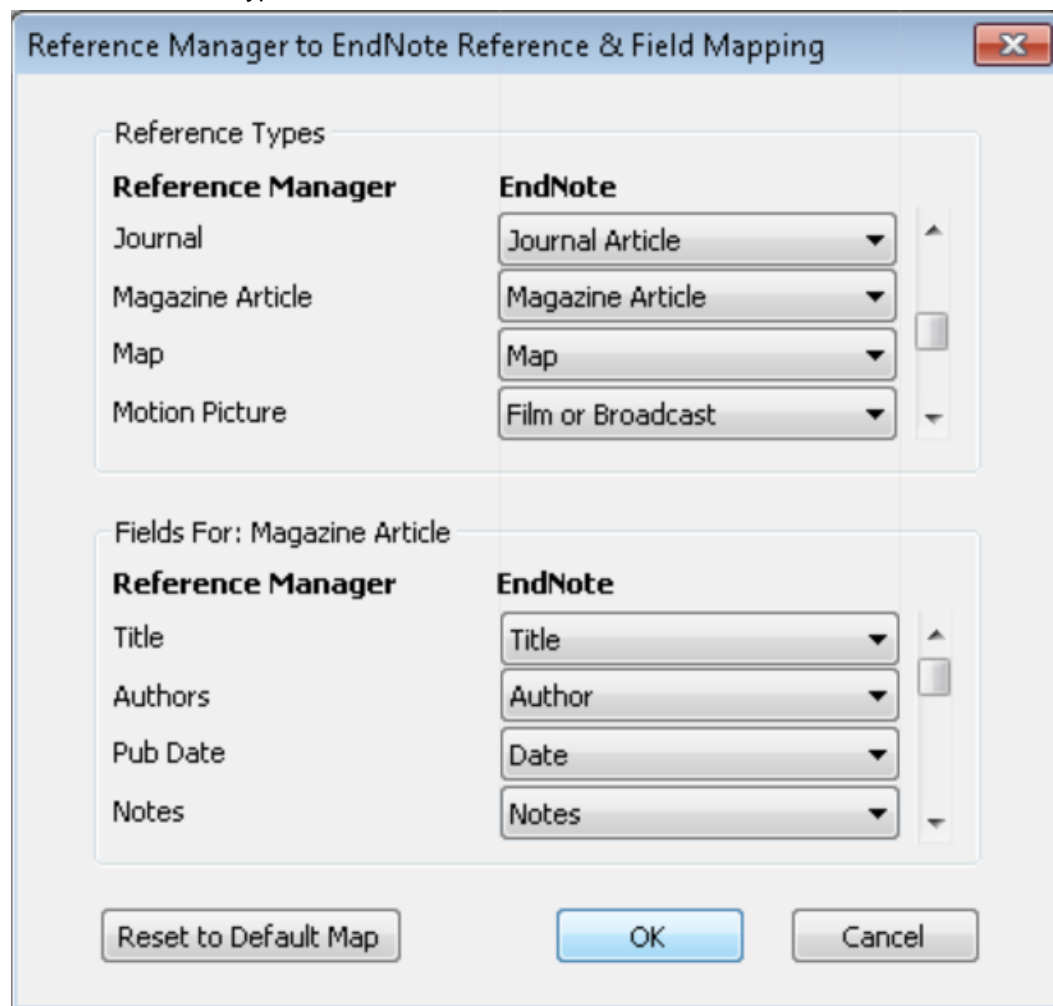
- If you have selected to customize your conversion, in the top half of the field mapping window you can select the EndNote reference type that each Reference Manager reference type will import as. For example, in the screen shot below it shows that any reference that was entered as an abstract in Reference Manager will be imported as a journal article in EndNote. You can change these options if you wish using the drop-down list for each match in the EndNote column.



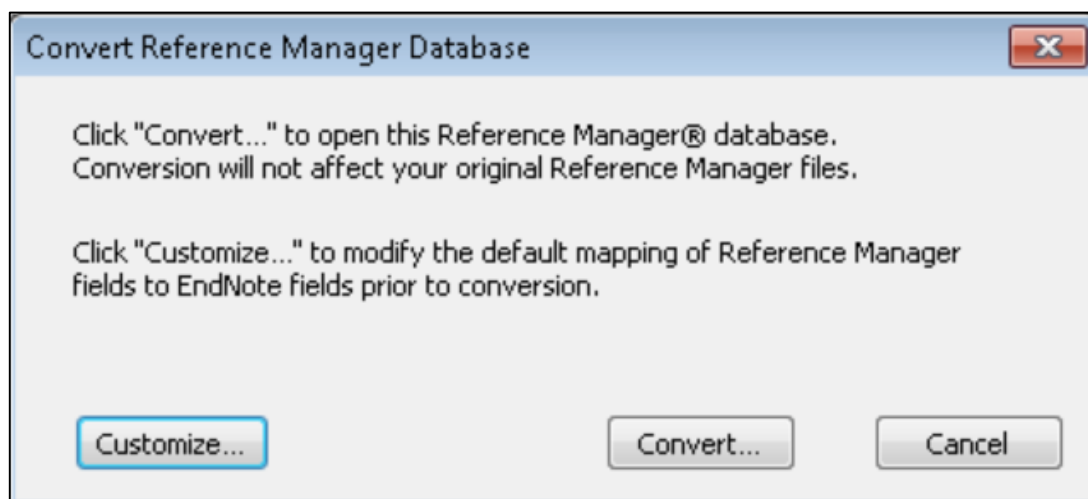
- In the bottom part of this window you can select the specific fields in EndNote that each Reference Manager field will map to for the shown Reference type. In the screenshot below, the Notes field for the Magazine Article reference type in Reference Manager is being mapped to the Notes field in EndNote.



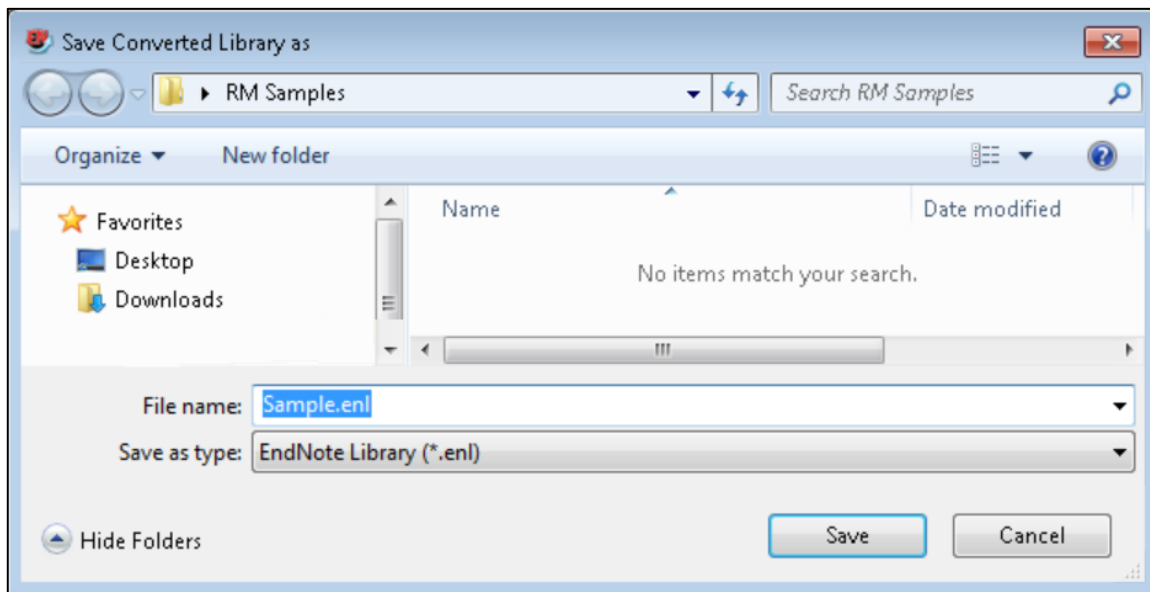
- When all reference types and fields are mapped as you wish, click the **OK** button to finalize the field and reference type customizations.



- Then click the **Convert** button to convert the database.

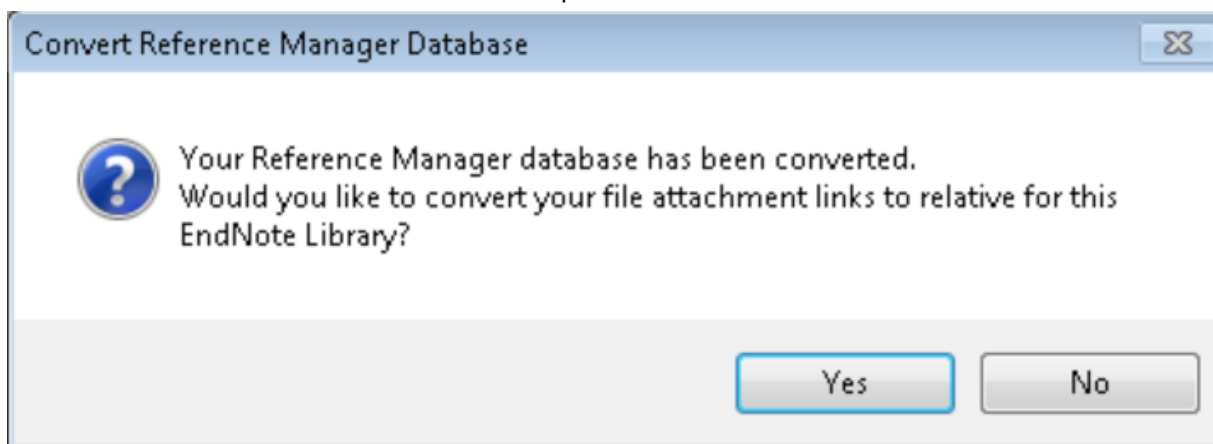


- Give your new EndNote library a name. We suggest saving the new library in your main documents folder. Never save an EndNote library in an online service such as Dropbox, SkyDrive, Google Drive, SharePoint, or similar online (“cloud”) storage. These services will corrupt an EndNote library. Similarly, do not put your library on a distant network server because the Internet lag times in communicating with a distant server can corrupt an EndNote library. It is best to store your library on your computer’s hard drive. Click the **Save** button to save your new EndNote library.

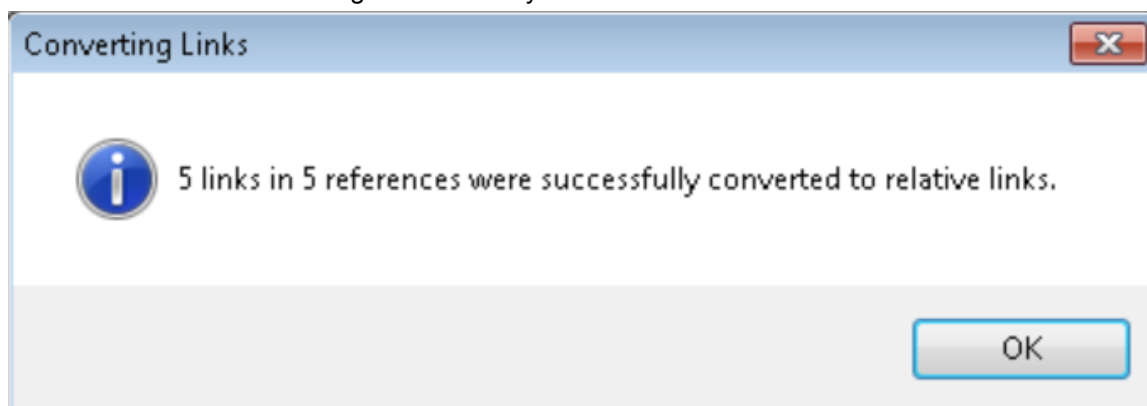


### 6.1.2 Converting Reference Manager Attachments to EndNote Attachments

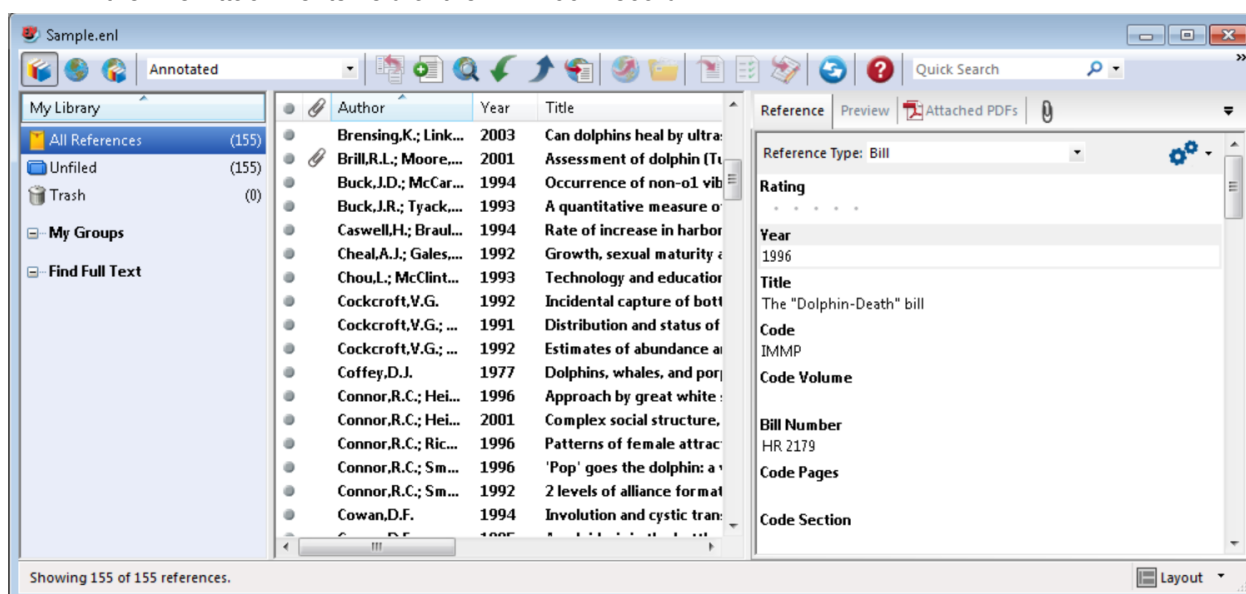
- If there were Reference Manager attachments in your database, EndNote will show the screen below, asking if you would like to convert them to relative links (attachments) in the EndNote library. This will copy the attachment files to the .data folder of the EndNote library and create links between the attachments and the matching records in the library. Click the **Yes** button to convert attachments. If you choose not to convert attachments, links to the original attachments will remain, but if you move your library to a new computer those links may be broken if the same directory structure does not exist on the new computer.



- You will receive a message of how many links have been converted. Click the **OK** button.

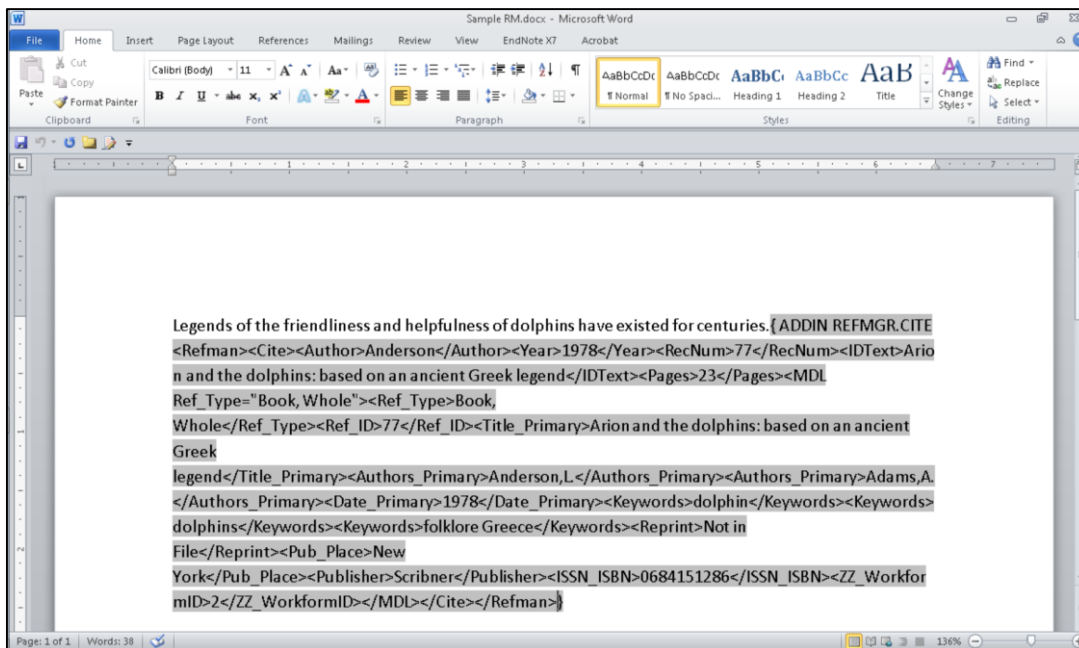


- Your new EndNote library will be displayed. The paperclip icon below shows there is something in the File Attachments field of the Brill 2001 record.

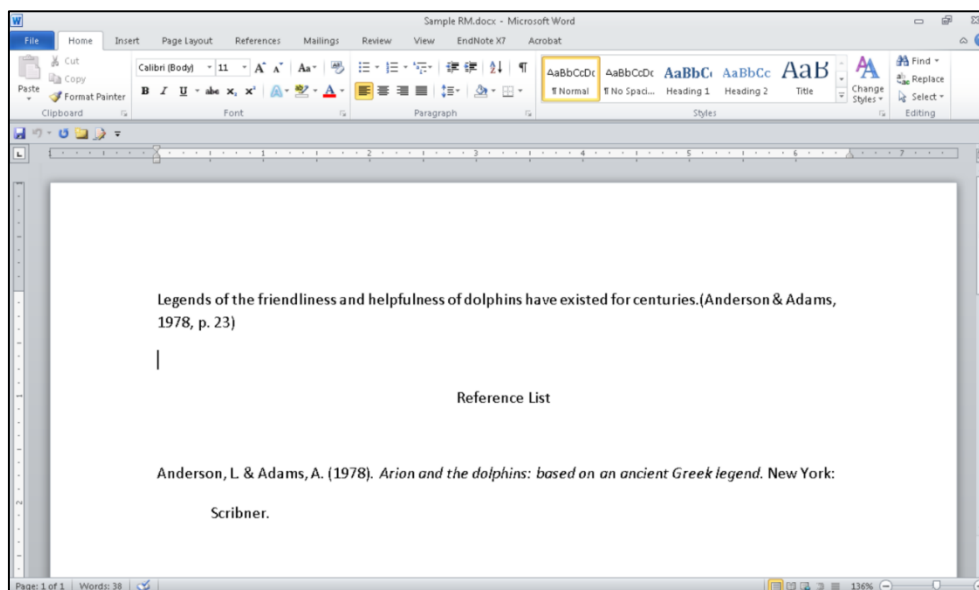


### 6.1.3 Converting Word Documents with Reference Manager Citations

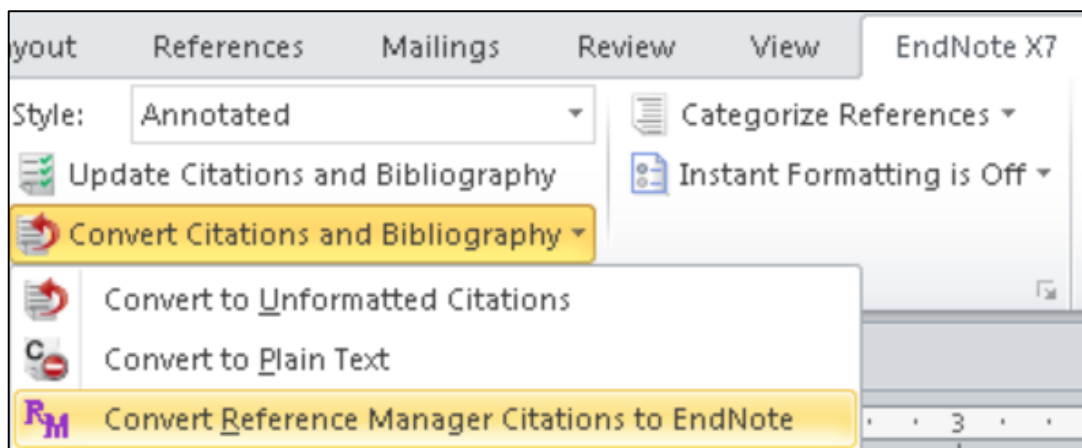
- Although you normally would not see the codes shown here, what you see below is an example of the actual coding that is inserted into your documents when you use Reference Manager's Cite While You Write in Word. The code starts with the text "ADDIN REFMGR.CITE" because this citation came from Reference Manager. These Reference Manager codes need to be converted to EndNote codes if you want to continue working with them using EndNote. (The field codes are shown by using the Toggle Field Codes command in Word. You do not need to do this to convert the citations.)



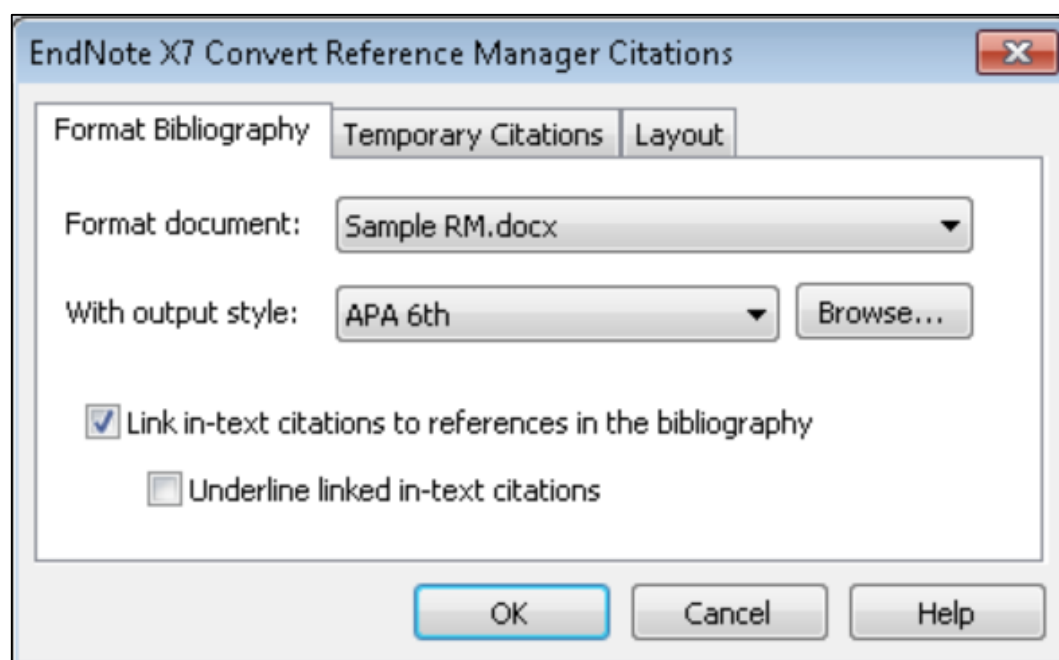
- The screenshot below is what you would normally see with your old Reference Manager citations in it. The codes are shown above just to give you an idea of what is really there. In this window you would first click on the EndNote tab on the ribbon, shown before the Acrobat tab below. The EndNote library you converted from Reference Manager will need to be open in EndNote to convert the codes.



- Select **Convert Reference Manager Citations to EndNote** from the drop-down **Convert Citations and Bibliography** list in the *Bibliography* group.

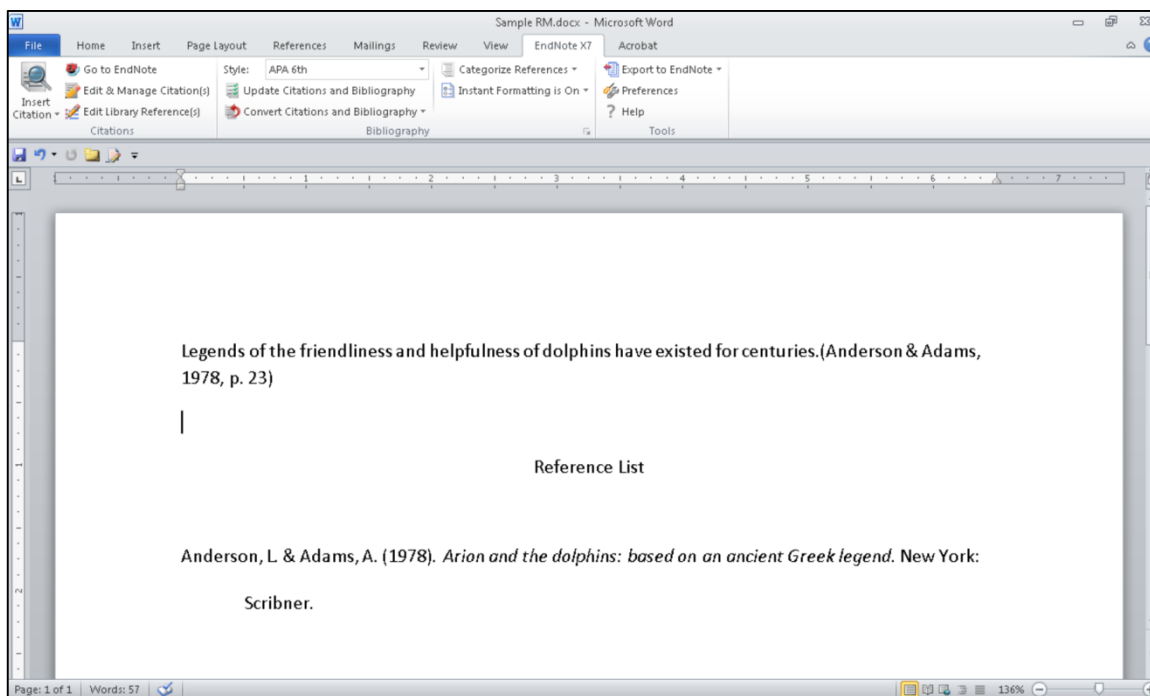


- EndNote will display the screen below, where you can select a style and set layout options much as you can in the Configure Bibliography window in EndNote. Set your options, then click on the **OK** button.

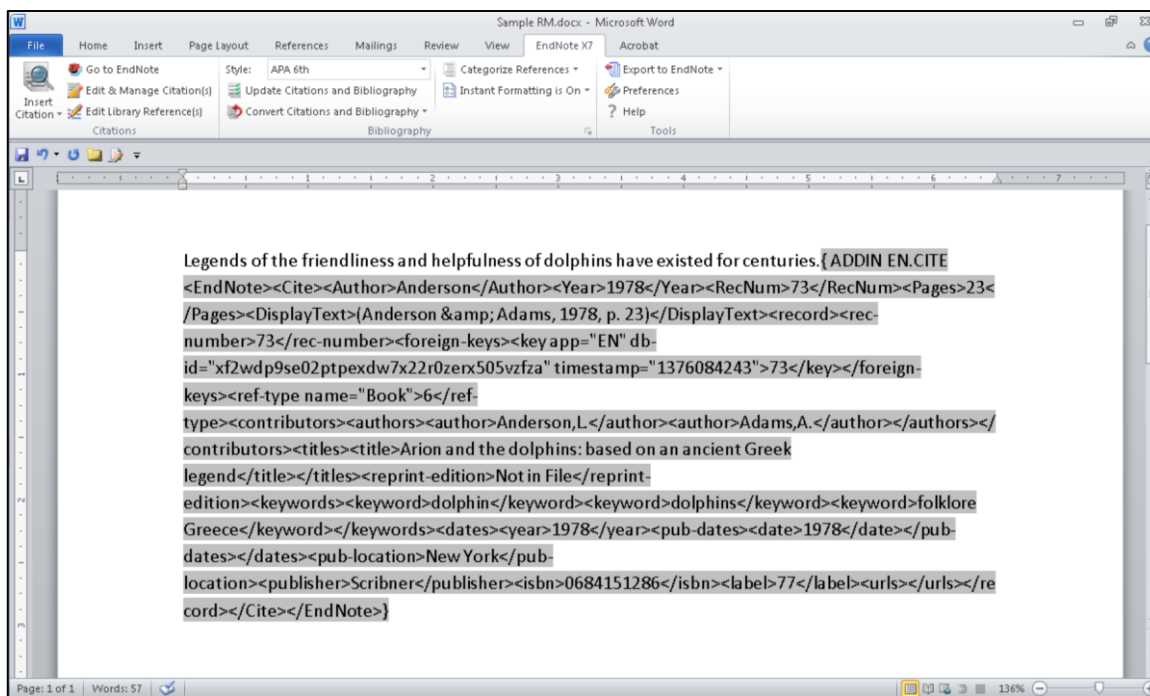




- The bibliography and citations look the same at first glance, but they are now EndNote citations and bibliography instead of Reference Manager. Note that in this example even the page number in the citation was converted.



- If you looked at the field codes in Word now, you would see the code begins with "ADDIN EN.CITE," showing that it is now an EndNote citation.



## 7 INDEX

- Backing Up a Library. *See* Compressed Libraries:For Backups
- Browser Actions with Direct Export, 13
  - Firefox on Macintosh, 15
  - Firefox on Windows, 13
  - Google Chrome on Windows, 17
  - Internet Explorer on Windows, 17
- Capture. *See* EndNote Online:Capture
- Capture Bookmarklet. *See* EndNote Online:Capture Bookmarklet
- Cite While You Write, 41
  - Word for Windows, 41
    - Adding Citations, 41
    - Configuring the Bibliography, 44
    - Editing Citations, 44
    - Installing, 41
    - Selecting Styles, 43
  - Word on Macintosh, 47
    - Adding Citations, 47
    - Configuring the Bibliography, 51
    - Editing Citations, 51
    - Installing, 47
    - Selecting Styles, 50
- Collaboration, 55
  - EndNote Online, 56
    - Groups Shared by Others, 59
    - Sharing Groups, 57
  - How Not To Share a Library, 55
    - Amazon Cloud, 55
    - Box, 55
    - Cloud Services, 55
    - Dropbox, 55
    - EndNote Read-Write Libraries on Network Drives, 55
    - Google Drive, 55
    - Sending .enl Files, 55
    - SharePoint, 55
    - SkyDrive, 55
    - SugarSync, 55
  - Network Drives, 55, 60
    - EndNote Read-Only Library, 60
    - EndNote Read-Write Libraries, 55
  - Send a Compressed Library, 60
  - Traveling Library, The, 62
- Compressed Libraries, 60
  - For Backups, 26
  - For Sharing References, 60
- CWYW. *See* Cite While You Write
- Direct Export, 5
  - EndNote Online Plug-In, 18
    - Firefox, 19
    - Internet Explorer, 18
  - Google Chrome on Windows, 20
  - PubMed, 9
    - Not Using the Clipboard, 11
    - Using the Clipboard, 9
  - Using EndNote Online Plug-In, 35

- Web of Science, 5
  - Not Using the Marked List, 7
  - Using the Marked List, 5
- EndNote Library
  - Components, 55
  - Sharing. *See* Collaboration
- EndNote Online, 18, 26
  - Capture
    - Capturing a Single Reference, 39
    - Capturing Multiple References, 35
    - Google Chrome, 37
    - Google Scholar, 36
    - Google Scholar Non-U.S. Sites Workaround, 37
    - Google Scholar with Internet Explorer or Firefox, 36
    - PubMed, 37
    - PubMed in Google Chrome, 38
    - PubMed in Internet Explorer or Firefox, 37
  - Capture Bookmarklet, 35
    - Google Chrome and Safari, 35
    - Safari on iPad, 36
  - EndNote Online Plug-In, 18
    - Firefox, 19
    - Internet Explorer, 18
  - Sharing Groups and References, 56
- EndNote Online Plug-In, 28
  - Capture, 35
  - Installing
    - Firefox Extension, 33
    - From Downloaded .msi File, 33
    - From within Internet Explorer, 28
    - Internet Explorer, 28
- EndNote Sync, 26, 27
  - Setup, 26
- PDF Files
  - Importing, 21
    - Macintosh, 22
    - Windows, 21
  - PDF Handling Preferences, 23
    - Macintosh, 24
    - Windows, 23
- Preferences, Setting
  - PDF Handling, 23
- PubMed
  - Direct Export. *See* Direct Export:PubMed
- Reference Manager, 65
  - Converting Attachments to EndNote, 69
  - Converting the Reference Manager Database, 65
  - Converting to EndNote, 65
  - Converting Word Documents with Reference Manager Citations, 71
- Sharing EndNote References. *See* Collaboration
- Sync. *See* EndNote Sync
- Synchronizing Libraries. *See* EndNote Sync
- Synchronizing References. *See* EndNote Sync
- Web of Science
  - Direct Export. *See* Direct Export:Web of Science



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