Referencing: EndNote
Manage your research reading

The small print

Prerequisites

Time in the workshop is precious – it is an opportunity for you to interact with the workshop leader and other participants through questions and discussions and to share your experiences and concerns. To make the most of this time we sometimes ask you to carry out learning activities ahead of the workshop so that everyone comes into the class with the same basic knowledge. We keep this prior learning to a minimum and often make use of online videos.

Your course booking will tell you if any prior learning activity is required. If you arrive for a workshop without having done the prior learning, the workshop leader may suggest that you come back on another session.

Copyright

About the workshop designer

Pamela Stanworth has over a decade's experience working on formal documents, theses and reports with researchers and departments across the University. She brings a pragmatic approach to managing research reading and building documents that are effective, reliable and sustainable.

Pamela's roots are in engineering, working with blue-chip industrial companies, technical consultancy and small businesses. Her commitment in teaching and consulting is to enable people to use appropriate technology in their work, efficiently and to a high standard.

Revision history

Version	Date	Author	Comments
1.0	April 2017	Pamela Stanworth	Created
1.1	September 2019	Pamela Stanworth	Updates
2.0	October 2020	Pamela Stanworth	Reviewed for online teaching
2.1	January 2020	Pamela Stanworth	EndNote 20
2.2	September 2023	Pamela Stanworth	EndNote 21

About this workshop

This workshop helps you to get your research reading organised, using a reference app such as *EndNote*, and to develop an efficient workflow when collecting papers and academic documents.

What you will learn

We will discuss how to manage your collection of references using different kinds of groups, automatic and ad-hoc. As your references accumulate, it is important to keep the collection in good order, up to date and avoiding duplicates, so we will discuss aspects of library housekeeping.

EndNote has a suite of tools for looking after your collection of PDFs – full texts of journal articles and papers, so we will explore what is available and you will consider which tools will suit your own way of working.

Working with *EndNote* (desktop) and *EndNote Web* together provides a very flexible workflow so we will look at how these related but separate tools can work together.

We will include pointers to other workshops and further resources that will help you go on later to create and manage your academic documents.

What you need to know

The ideas and techniques covered in this workshop will apply to a range of reference management tools. We will demonstrate using *EndNote*, which is widely used. However, the concepts will be the same or similar, whichever reference manager app you decide to use.

I will assume that you are reasonably confident in using the tool you have chosen to use to manage your research reading. With your chosen tool, you will need to be able to:

- Create a reference in a library
- Search online for references and download into your library
- View and amend a reference
- Navigate the commands and menus, using Help as necessary

If you need to review these activities, there is an activity with relevant videos in the IT Learning Portfolio: visit skills.it.ox.ac.uk/it-learning-portfolio and search for "EndNote research activity" or similar search text.

The resources you need

Sample files that you can use to experiment with will be available, but you may like to bring along your own.

The resources for most workshops, including any pre-course activity, are in the IT Learning Portfolio: visit skills.it.ox.ac.uk/it-learning-portfolio and search for "EndNote research".

Unless you have been told otherwise, in classroom workshops there will be a computer available for you to use with *EndNote for Windows* and *Word for Windows* installed.

You can use your own computer with your preferred app installed if you want to – just bear in mind that I am not an expert in every app (although I am sure that between us we will be able to sort out most problems!).

Learning Objectives

This workshop has the following learning objectives:

Learning Objective One – Organising references into groups

Learning Objective Two – Working with smart groups and combination groups

Learning Objective Three – Maintaining and searching within the library

Learning Objective Four – Finding and removing duplicates

Learning Objective Five – Attaching PDFs to *EndNote* references

Learning Objective Six – Creating a reference from a PDF

Learning Objective Seven – Creating a library with EndNote Web

Learning Objective Eight – Synchronising libraries online and on the desktop

Learning Objective Nine – Sharing with colleagues via EndNote Web

Learning Objective One – Organising references into groups

With all your references stored in one library, you could set up groups to keep the references well organised. Open **renaissance4.enl**, and notice the number of references already stored there.

Explore the automatic groups already in place (some may be empty at first, but keep an eye on them as we work on them during this course).

Create a custom group for a topic such as **allegory**, and drag a few references that seem suitable, to make them members of the new group. Create and populate some more custom groups for practice. Try making one reference belong to several groups – is that meaningful?

Use the **Reference Summary** (in the **References** menu) to find out, for a selected reference, which group/s it belongs to.
Try deleting a reference from a custom group – does this also delete the reference from the library?

Learning Objective Two – Working with smart groups and combination groups

Create a smart group called **Early work**, which finds everything in your library from year 2000 or earlier. Examine its contents and confirm that it is working correctly. How might you make another reference join that group?

Create a combination group which shows items in **Museum Studies** journal that are also in the **Early work** group. Experiment with creating some further combination groups, using logical OR and NOT as well as AND.

Optional: Create a group set to keep together all the groups you have made today. Try dragging it up and down the Groups panel, to a more suitable position.

Learning Objective Three – Maintaining and searching within the library

Create a compressed copy of the library, suitable for storing as a backup. Resolve to make frequent backups of your library.

Try the **Find Reference Updates** service, as a way of making your references richer and more complete.

Use the simple search to find all references containing `art`. After looking at the search results, use **All References** to see the whole collection again.

Run an advanced search to show only works dated `2007` or later.

Set up more advanced searches based on several fields, to practice using AND and OR and NOT.

Learning Objective Four – Finding and removing duplicates

Search for any duplicate references which may have been collected from the various sources you have searched. Inspect the pairs: if you agree that some are duplicates, delete the unnecessary references.

When you searched for duplicate entries, the search may not have been rigorous – for example, various online databases have different conventions for presenting multiple author names, so some duplicate entries may have been missed. Look through your library and see if you can spot any such.

Change the criteria for duplicates so that author names need not match exactly. Re-run the search for duplicates and review the outcome.

Learning Objective Five – Attaching PDFs to *EndNote* references

Suppose the full text of one of your papers has already been downloaded as a PDF file and saved locally on your computer. Attach the **stately home geology.pdf** (provided with your student files), to any suitable reference. Now this PDF file is stored inside your *EndNote* library. Notice the paperclip icon that appears beside the reference.

View the PDF file and try out the tools for annotating and highlighting text. Note you can also open the PDF file using other software that you may have installed on your computer.

A group called **Get full text please** has been set up in the **renaissance4** library. Find the full text of some of the papers in this group, using *EndNote's* automatic tool.

Learning Objective Six – Creating a reference from a PDF

Suppose you have previously downloaded the full text of a paper, as a PDF file. Inspect **material turns in British history.pdf** which has been provided.

It would take some time to create a reference for this paper in your *EndNote* library, by typing or copy/pasting the details into appropriate fields. Instead, import the details from the PDF file into the *EndNote* library. Notice that a new reference is created, with the PDF attached (notice the paperclip icon).

Learning Objective Seven – Creating a library with EndNote Web

Note: Even if you already have a personal account with *EndNote Web* or *EndNote Online*, do not use that for these exercises, as this may damage your own collection of references.

Close the **renaissance4.enl** library and open the smaller **alpine4.enl**.

In **Preferences| Sync,** delete any text under the EndNote Account Credentials and click **Apply**. **Enable Sync** and **Sign Up** to create a new account with *EndNote Web*. Make a note of the email address and password that you have set up: you will need them shortly.

Review the settings in the **Sync Preferences** dialog, and think about how you will want to work in future.

Sync the **alpine** local library with the online library.

Learning Objective Eight – Synchronising libraries online and on the desktop

Visit the website <u>web.endnote.com</u> and sign in to your new *EndNote Web* library.

Explore the library on the **My References** tab. References, PDFs and custom groups should have been synced. Edit a few references in the online library, then go back to the *EndNote* library and **Sync** again.

Learning Objective Nine – Sharing with colleagues via *EndNote Web* (Optional activity working in pairs)

You can share your library of references with a colleague, if both of you have accounts with *EndNote Web*. Note: someone can only *use* your shared library if their account is based on a real email address and they can receive and read emails.

In *EndNote*, use **File|Share** and send an invitation to a colleague, by giving the email address on which they have based their *EndNote Web* library. Ask your colleague to read the email that has been sent to them, and respond.

Your colleague should use **File|Open Shared Library** in their copy of *EndNote*, then they will have full read-write access to your whole library and collection of PDFs.

Further information

Getting extra help

The IT Learning Centre offers bookable clinics where you can get pre- or post-course advice. Contact us using courses@it.ox.ac.uk.

Study Videos from LinkedIn Learning

On our website, you will find our collection of self-service courses and resources. This includes providing LinkedIn Learning video-based courses free to all members of the University. Visit skills.it.ox.ac.uk/linkedin-learning and sign in with your Single Sign-On (SSO) credentials.

About the IT Learning Portfolio online

Many of the resources used in the IT Learning Centre courses and workshops are made available as Open Educational Resources (OER) via our Portfolio website at skills.it.ox.ac.uk/it-learning-portfolio.

Find the pre-course activity for this course in the IT Learning Portfolio: visit skills.it.ox.ac.uk/it-learning-portfolio and search for "EndNote research activity".

About the IT Learning Centre

The IT Learning Centre delivers a programme of digital skills courses, which are provided in our teaching rooms and online, and we give you access to thousands of on-line self-service courses through LinkedIn Learning.

Our team of teachers have backgrounds in academia, research, business and education and are supported by other experts from around the University and beyond.

Our courses are open to all members of the University at a small charge. Where resources allow, we can deliver closed courses to departments and colleges, which can be more cost-effective than signing up individually. We can also customize courses to suit your needs.

Our fully equipped suite of teaching and training rooms are usually available for hire for your own events and courses.

For more information, contact us at courses@it.ox.ac.uk.

About IT Customer Services

The IT Learning Centre is part of the Customer Services Group. The group provides the main user support services for the department, assisting all staff and students within the University as well as retired staff and other users of University IT services. It supports all the services offered by IT Services plus general IT support queries from any user, working in collaboration with local IT support units.

The Customer Services Group also offers a data back-up service. Customer Services is further responsible for desktop computing services – for staff and in public/shared areas – throughout UAS and the Bodleian Libraries.

Course Slides

The following pages contain images of the slides used in the presentation. The original PowerPoint presentation file can be downloaded from the same place where you obtained this course book.

EndNote:
Manage your research reading

Pamela Stanworth
pamela.stanworth@it.ox.ac.uk

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Resources for your learning

Activities for you to practice today
In the coursebook
Work at your own pace!
Be selective

Videos with today's topics
Follow-up work
Continue with exercises after the session
Bookable Course Clinics later

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Course topics

Organising into groups	Searching for PDFs
Custom, smart and other groups	Attaching PDFs and other data
Library housekeeping	EndNote Web & Online
Controlling duplicates	Synchronising local and online

EndNote versions?

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Getting Started

Build a library of references

Grouping references

Working with groups

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Custom groups
– You choose the members

Create groups with useful names
Drag references into suitable groups
A reference can belong to several groups
Deleting an item from a group does not
delete it from the library

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Smart groups are self-populating
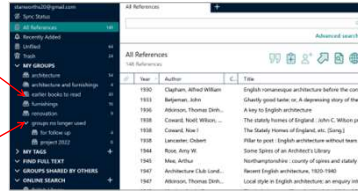
Create a new smart group: define its criteria
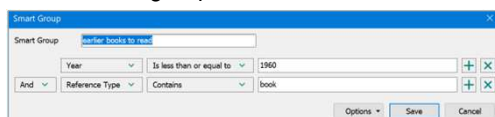
Or run a search, then send results to a smart group

New items added to the library are *automatically
included* in relevant smart groups

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Combining Groups (*optional*)

Create from groups using logic: AND/OR/NOT

Use group sets as containers to manage the groups

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Tabs (*optional*)

View groups in different tabs
Switch between tabs
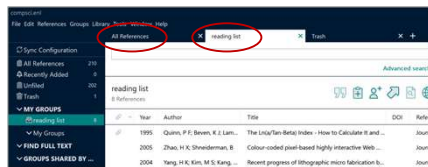
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Coloured tags

Another way to organise your references
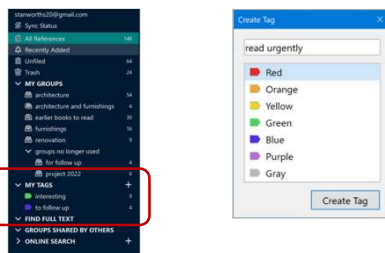
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EndNote – Manage your research reading

Learning Objectives One and Two

Resume at 2:50 please

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Find the resources for the workshop in our IT Learning Portfolio

Download the files (and more) from the IT Learning Portfolio at

skills.it.ox.ac.uk/it-learning-portfolio

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Housekeeping

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Back up your data

Disks fail, viruses attack

Make backup copies of the library file
  Frequently!
  Save A Copy
  or save a **Compressed Library** .enlx

You need **MyLibrary.enl**
and **MyLibrary.data**

Searching through the library

Simple Search
- finds in any field

Advanced Search
- set criteria
- use AND / OR / NOT
- wildcards * ?
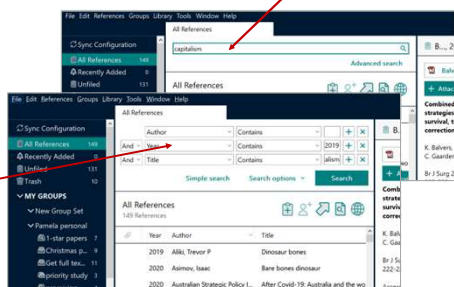
Updating reference details

Find Reference Updates
Seeks updates for all selected references
Choose carefully

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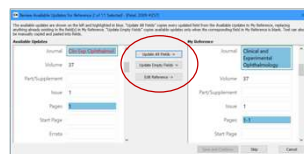
Removing duplicates

Same source may be listed in several libraries, with small differences

EndNote considers a duplicate if author, year, title and reference type all match
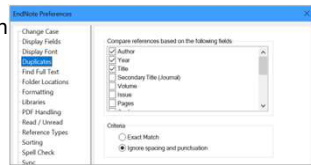
Now delete the unwanted reference
(choose carefully)

What is a duplicate?

Find Duplicates lists pairs of references that seem to be duplicates

Look at **EndNote Preferences | Duplicates**
  Choose fields
  Exact or approximate match

EndNote – Manage your research reading

Learning Objectives Three and Four

Resume at 3:20 please

**Attaching PDFs
and other data to a reference**

Viewing PDFs

Stored in the *EndNote* library
View the PDF in *EndNote*
or using your PDF software eg. *Adobe*

Working with PDFs

View, annotate
Search a whole reference
including PDF, notes etc

Full text of an article

URL …

URL	https://dx.doi.org/10.1001/jama.2023.3651
… DOI	DOI 10.3130/aija.68.193_2
… PDF	File Attachments 📄 Kloppmann-Lambe-2018-Specialised asp... ⌄

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Getting PDFs and papers

Got a ref, Find Full Text
Searches online
Downloads a copy if
possible; else the URL

Needs Oxford SSO
For OpenURL settings,
see IT Learning Portfolio

> ⌄ FIND FULL TEXT
> 📄 Searching...   1
> 📄 Found PDF   8
> 🔗 Found URL   2

Got full text, find the ref
File|Import
Imports data from a PDF
Creates a new reference
using the metadata

Optional:
Set up an auto-import
folder

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Capture Reference bookmarklet

Try the **Capture Reference** button
Drag & drop button onto your browser toolbar
From EN Online Classic

While reading any website
Button captures details of the paper
Creates an *EndNote* reference

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"EndNote Click" [*optional*]

Try EndNote Click
    An add-in for your browser

While reading a paper in a database website
    Downloads the PDF and metadata
    To your EndNote Web account
    And creates an *EndNote* reference

EndNote – Manage your research reading

Learning Objectives Five and Six

Resume at 4pm please

EndNote Web – the online app
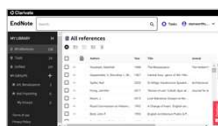
EndNote on the Desktop or EndNote Web?

EndNote Web
  Free to join
  Software and library are on the web
  Need internet access

EndNote (on the desktop)
  Install on your own computer
  Customisable e.g. output styles
  An Add-in to Word

So use both ☺

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Create an online library

Sign up for an online account from inside EndNote
Preferences
[Enable Sync] then [Sign Up]

or give your existing EndNote Web account details

? Sync automatically?

email address appears in Groups panel

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Sync your library

Check email address shows at top of
Groups panel

[⟳ Sync Status] then [⟳ Sync now]

Same custom groups as
your desktop library

[Compare versions]

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EndNote on your desktop and online

MyLibrary.enl

john.smith@ox.ac.uk

EndNote on two computers
(via online)

john.smith@unit.ox.ac.uk

At work
MyLibrary.enl

At home
MyLibrary.enl
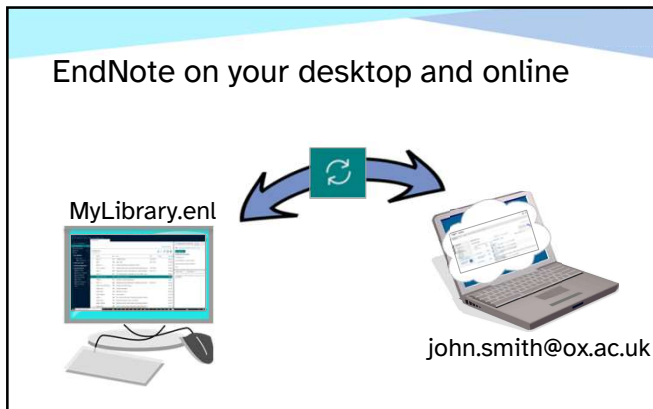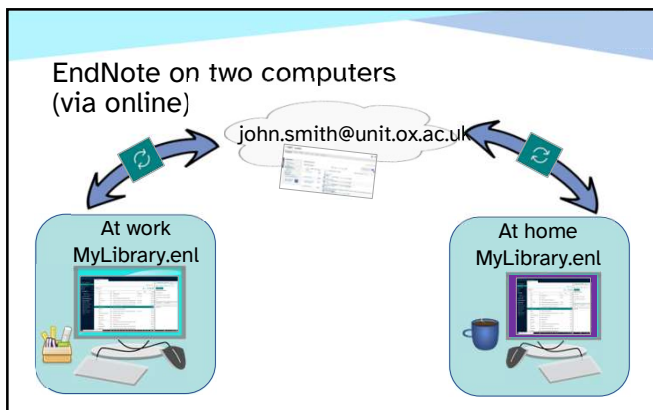
Sharing and collaborating
via EndNote Online

One library per person is simplest ☺
Share a whole library
   You permit up to 1000 to share your library
   They receive an email, then open shared library
   They can read-write the whole library
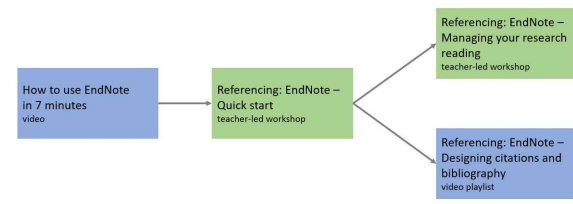Share a group
   Read-only or read-write

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More help with referencing

Next steps

		Referencing: EndNote – Managing your research reading teacher-led workshop
How to use EndNote in 7 minutes video	Referencing: EndNote – Quick start teacher-led workshop	Referencing: EndNote – Designing citations and bibliography video playlist

Other useful courses

Word:
   Good practice in document design
   Thesis and book design

EndNote: Quick start

EndNote – Manage your research reading
Look at Learning Objectives Seven onwards

Finish at 4:30 please

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One researcher, one library,
and a copy in the cloud
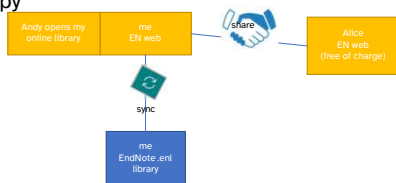
me
EN web

sync

me
EndNote .enl
library
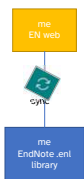
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One researcher has a local library, and a copy in the cloud

A colleague works on the cloud library directly online (needs to know credentials)
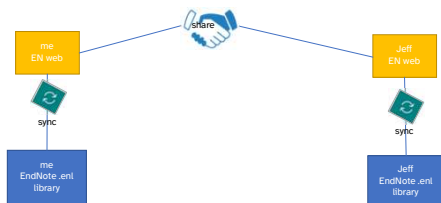
Other colleague has an online library, shared with my online copy

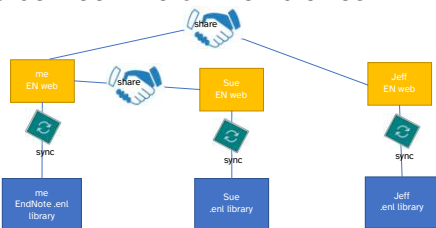## 2 researchers, each has their own local library (working library)

Each syncs to their own online library
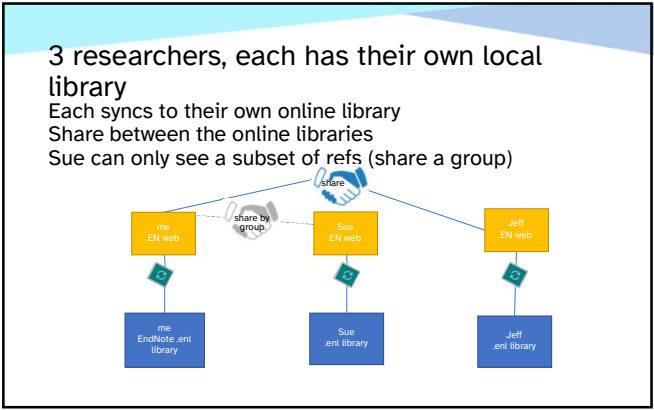Share between the online libraries
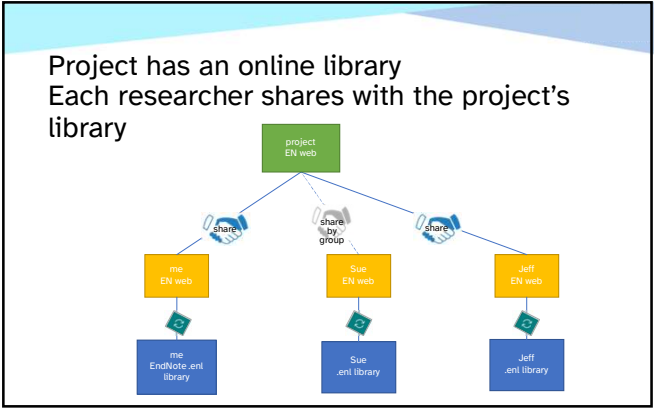
3 researchers, each has their own local library

Each syncs to their own online library
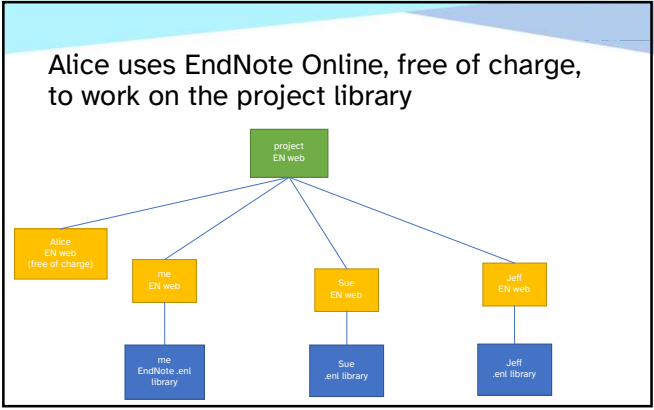Share between the online libraries

3 researchers, each has their own local library

Each syncs to their own online library
Share between the online libraries
Sue can only see a subset of refs (share a group)

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Project has an online library
Each researcher shares with the project's library

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Alice uses EndNote Online, free of charge, to work on the project library

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