

# Reference management with EndNote

*Note: A new version of the program is published every autumn. Current tutorials have been used when available, but sometimes they are based on previous versions. Since the program structure has been similar in all versions since X8, tutorials for older versions can also be used.*

## **For Beginners**

**The Little EndNote How-to Book** (PDF) – Step-by-step instructions for installing EndNote and for using many of the popular features in EndNote

[https://clarivate.libguides.com/ld.php?content\\_id=42104347](https://clarivate.libguides.com/ld.php?content_id=42104347)

## **How to use EndNote 20 in seven minutes**

Windows <https://videos.webofsciencegroup.com/watch/i5LiRC1uvXZzFmB53EEpF6>

macOS <https://videos.webofsciencegroup.com/watch/mnwAQvGhxxR2LsCrfxpCzA>

**EndNote 20 essentials (Windows):** a class recording

<https://videos.webofsciencegroup.com/watch/stXc4ZLPjndKs7ZtadCeFX>

Library components

<https://videos.webofsciencegroup.com/watch/q77wCCm6fQwU9HtW7ETDZ6>

Library overview

[https://clarivate.libguides.com/ld.php?content\\_id=58319417](https://clarivate.libguides.com/ld.php?content_id=58319417)

Library customizations

<https://videos.webofsciencegroup.com/watch/AWzHQ1H1K7fHVAh1LoaPq6>

**EndNote X9 menus reference guide** – Beschreibungen der wichtigsten Befehle und Benutzeroberfläche von EndNote

[https://clarivate.libguides.com/ld.php?content\\_id=42141672](https://clarivate.libguides.com/ld.php?content_id=42141672)

## **EndNote X9 Quick Reference Guide**

Windows [https://clarivate.libguides.com/ld.php?content\\_id=44898510](https://clarivate.libguides.com/ld.php?content_id=44898510)

macOS [https://clarivate.libguides.com/ld.php?content\\_id=44898519](https://clarivate.libguides.com/ld.php?content_id=44898519)

## **The EndNote X9 Guided Tour**

Windows [https://clarivate.libguides.com/ld.php?content\\_id=42326715](https://clarivate.libguides.com/ld.php?content_id=42326715)

macOS [https://clarivate.libguides.com/ld.php?content\\_id=42326728](https://clarivate.libguides.com/ld.php?content_id=42326728)

## **Adding references**

A video collection regarding different way to import references into your EndNote library

<https://www.youtube.com/playlist?list=PL32C57F72E59A685D>

Create a new reference

<https://videos.webofsciencegroup.com/watch/nZ2uUXpEy4B7BrJfRP1fQ>

Online Search

<https://videos.webofsciencegroup.com/watch/86sHRnjPjvnhMxHcGyaKEw>

Direct Export from new Web of Science

<https://videos.webofsciencegroup.com/watch/xiZj6g4eaihxeJbYkDYJRN>

Direct Export from classic Web of Science

<https://videos.webofsciencegroup.com/watch/hv8HbBDF4kbPHMwnnf2SWD>

Direct Export from PubMed.gov

<https://videos.webofsciencegroup.com/watch/Tvpw1Cq8bVMCWJ8twrg1Rb>

Importing text files

<https://videos.webofsciencegroup.com/watch/kDvLfxtgmqA9C614d828W>

## **Organize & Manage your library**

Importing a journal term list

<https://videos.webofsciencegroup.com/watch/dPNc2Qj9VxaFjpuMX8rbi7>

Find reference updates

<https://videos.webofsciencegroup.com/watch/KRTBy6JBok877MUi46kfNX>

Find duplicates

<https://videos.webofsciencegroup.com/watch/VFEfCFSyWZaRszRaDaRSJN>

Globally edit reference information

<https://videos.webofsciencegroup.com/watch/MGbg9y9ikr3pNstmir72NLg>

## **PDF management / Find Full Text**

Find Full Text

<https://videos.webofsciencegroup.com/watch/RkA1hYVr6w6ZhpA8rQh6XM>

Find Full Text preferences

<https://videos.webofsciencegroup.com/watch/SHMk1r8jPjsdULn7Gre4kQ>

Importing PDF files

<https://videos.webofsciencegroup.com/watch/nWab39v4AnTGNQvxFKTGQ2>

PDF Auto Import folder

<https://videos.webofsciencegroup.com/watch/qevcLRLj9CSZn23PJnGhBE>

File attachments

<https://videos.webofsciencegroup.com/watch/BBSTwbEuBMYpeRdzXB2CTf>

Annotating PDF files

<https://videos.webofsciencegroup.com/watch/ScjYtT8nipxydqECsQCna4>

Working with PDFs and other attachments: A Live Class Recording

<https://www.youtube.com/watch?v=5AleDOPfGyE&list=PLAEGcPDviwLbGgnHSE3qsEjuk6Tq9d5uQ&index=8>

## **Groups**

Custom Groups

<https://videos.webofsciencegroup.com/watch/Dsefjxw9LxuLgX65VDSCsM>

Smart Groups

<https://videos.webofsciencegroup.com/watch/PrnGM3JvaSRpUEkMzH2ueN>

Combined groups

<https://videos.webofsciencegroup.com/watch/8YsKGMXx9bih4BNTTCryG1>

Group sets

<https://videos.webofsciencegroup.com/watch/xXCqhodJg6zLoHrnDzb2Fy>

## **Publish / Cite While You Write**

### **Insert, edit & remove citations**

Insert Citation

<https://videos.webofsciencegroup.com/watch/3XQrh3Dvo7ZLij9VUpqe2h>

Insert Selected Citation(s)

<https://videos.webofsciencegroup.com/watch/dUhy5o22txuX64i5uzLKCX>

Edit & Manage citations

<https://videos.webofsciencegroup.com/watch/1shssdk5BaugDGANCGuKu3>

Remove citations

<https://videos.webofsciencegroup.com/watch/JRiHvXTSfD2mNZsTT74iQ4>

Categorize references in bibliography

<https://videos.webofsciencegroup.com/watch/tw9s5Uo9jr42kWkgPFxh4d>

Cite While You Write installation tips

<https://videos.webofsciencegroup.com/watch/YCn16Pt49wXQAZKmmPDCPT>

Video collection on how to create bibliographies with EndNote libraries on both Windows and Macintosh <https://www.youtube.com/playlist?list=PL48618A3F2029BB6B>

### **Cite While You Write: Basics: A Live Class Recording**

Windows <https://www.youtube.com/watch?v=m-h-nLyDw9g&list=PLAEGcPDviwLbGgnHSE3qsEjuk6Tq9d5uQ&index=5>

macOS

<https://www.youtube.com/watch?v=E7xNPibNVho&list=PLAEGcPDviwLbGgnHSE3qsEjuk6Tq9d5uQ&index=2>

CWYW: Beyond the Basics: A Live Class Recording

<https://www.youtube.com/watch?v=hTTBqFvzzik&list=PLAEGcPDviwLbGgnHSE3qsEjuk6Tq9d5uQ&index=6>

### **Creating Stand-Alone bibliographies**

[https://support.clarivate.com/Endnote/s/article/EndNote-Creating-Stand-Alone-Bibliographies?language=en\\_US](https://support.clarivate.com/Endnote/s/article/EndNote-Creating-Stand-Alone-Bibliographies?language=en_US)

**Expert features in EndNote 20 (Windows): a class recording** (Output Styles, Import Filter etc.)

<https://videos.webofsciencegroup.com/watch/RM2ta6HGeiXd2E2UFxQjit>

### **Collaborating with EndNote / EndNote Online**

#### **Sync**

How to sync references, custom groups, group sets, smart groups, and combination groups between desktop computers

<https://www.youtube.com/watch?v=jQ9LSWzMV3c&list=PLAEGcPDviwLbfYCzJuO2faRhYyiCT3ZMw&index=8>

Sync status

<https://videos.webofsciencegroup.com/watch/Wi6n4xdJ4aY4zDvXyxkCG7>

Configure Sync

<https://videos.webofsciencegroup.com/watch/weSKNS2pGyMeyS16cEjPte>

#### **Library Sharing**

Share your designated EndNote Sync library with up to 100 other EndNote desktop users

<https://videos.webofsciencegroup.com/watch/coVnXZtkKUUf2EDWWqmoVk>

Library sharing invitation

<https://videos.webofsciencegroup.com/watch/TLQgHzdVAf8tFvYxXDpQ8b>

Opening a shared library

<https://videos.webofsciencegroup.com/watch/q77wCCm6fQwU9HtW7ETDZ6>

Group sharing

<https://videos.webofsciencegroup.com/watch/LYyduhaCuGPJKA3AeRWpg>

## **EndNote Online**

EndNote Online Quick Reference Guide

[https://clarivate.libguides.com/ld.php?content\\_id=56675793](https://clarivate.libguides.com/ld.php?content_id=56675793)

Class clips: linking EndNote online and Web of Science accounts

<https://www.youtube.com/watch?v=GgHBUkMHi3U&list=PLAEGcPDviwLaOrxWQ6qYE3TfKdJPwomVB>

An edited recording of a live class for EndNote basic/online

<https://www.youtube.com/watch?v=PeIShmCt9MM&list=PLAEGcPDviwLbGgnHSE3qsEjuk6Tq9d5uQ&index=3>

## **Downloads & More**

### **Downloads**

Output Styles

<https://endnote.com/downloads/styles/>

Import filters

<https://endnote.com/downloads/filters/>

Connection files

<https://endnote.com/downloads/connection-files/>

Knowledge Base

[https://support.clarivate.com/Endnote/s/global-search/%40uri?language=en\\_US#t=All](https://support.clarivate.com/Endnote/s/global-search/%40uri?language=en_US#t=All)

User Forum

<https://community.endnote.com/t5/EndNote/ct-p/endnote>

EndNote Training YouTube Kanal

<https://www.youtube.com/user/EndNoteTraining>

All Video tutorials

<https://videos.webofsciencegroup.com/categories/endnote>

Support

[https://support.clarivate.com/Endnote/s/?language=en\\_US](https://support.clarivate.com/Endnote/s/?language=en_US)

Mail [EndNote.support@clarivate.com](mailto:EndNote.support@clarivate.com)

### **General Safety Notes**

- EndNote libraries are made up of two parts: the .enl file and the .Data folder. These two parts must be kept together; both are needed for the library to work correctly.
- Keep EndNote libraries on your computer's local hard drive. Storing and editing libraries on a network drive can lead to corruption and performance issues.
- EndNote libraries should never be stored in cloud-syncing folders such as Dropbox, OneDrive, Box, SugarSync, etc. Syncing folders corrupt EndNote libraries over time.
- Uninstall your previous version of EndNote before installing a new version.