

EndNote X8 and EndNote Online

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WAGENINGEN
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EndNote X8 and EndNote Online

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1 Introduction

This is a brief manual for the Windows version of EndNote. It is intended to help new users of EndNote at Wageningen University and Research (WUR) to get started with the programme and addresses situations specific for WUR. Some basic skills in using Windows and MS Word are assumed.

In this brief manual not all possibilities of EndNote are dealt with. The original manual made by the producer (in PDF) is well written and very detailed. It is available in the EndNote programme directory (*EndNote Help*). The producer of EndNote also provides a Getting Started Guide, which can be found at <http://endnote.com/sites/en/files/m/pdf/en-x8-qrg-windows.pdf>.

This manual is used as course material for the course Working with Endnote. During the course you will learn:

- How to use EndNote to store details of references
- How to add references to an EndNote library
- How to use EndNote to search online databases
- How to manage data in EndNote
- How to manage full articles in EndNote
- How to use EndNote to automatically insert references in your texts and create reference lists

1.1 What is EndNote?

EndNote is a reference database. It specializes in storing, managing, and searching for bibliographic references, figures and tables in your private reference library. EndNote is also a reference list maker. It builds lists of cited works automatically in any format or journal style within the word processing programme MS Word or OpenOffice.org Writer. For other Word processors, please check the options in the EndNote manual by Clarivate Analytics (formerly Thomson Reuters), which can be found via Help in the EndNote programme.

1.2 Basic concepts

• library

In EndNote you work with libraries, also called Reference Library Files. They are the database files where your references are stored. EndNote libraries have the extension .enl. You can make as many libraries as you wish. The size of a library is unlimited. A [library name].DATA folder is automatically created for each library, in which settings, term lists, group information, figures, tables and PDFs are stored.

• reference

A library consists of references. EndNote automatically assigns a unique number to each reference. You cannot change this record number. EndNote shows this number in the temporary citations in MS Word.

• reference type

EndNote works with various reference types. There are reference types for journal articles, books, book chapters etc. In total there are 53 predefined and 3 customizable reference types. Choosing the right type is essential because EndNote manipulates the references when formatting a bibliography or reference list according to a specific journal style. Usually a book has to be formatted in another way than a journal article, and so on.

• field

An EndNote reference consists of fields, in which a particular piece of bibliographic information is stored, e.g. Author, Title, Year etc. This enables EndNote to arrange the field contents in different ways when formatting a reference according to a specific journal style, e.g. journal title in italics or volume numbers in bold. The maximum number of fields is 54 per reference. It is possible to enter long abstracts and notes—up to 64K, or approximately 16 pages of text, in any field.

• group

Groups are subsets of references within a library saved for easy retrieval. Some of the groups are automatically generated, such as All References, Imported references, Unfiled, Trash. Custom groups and smart groups are user defined.

- **filter**

A filter is a file consisting of one or more templates that instruct EndNote how to interpret and import bibliographic data into the corresponding fields in an EndNote library. For each bibliographic database a unique import filter is required, because the organisation of data differs between databases. EndNote filters have the extension .enf (EndNote filter).

Filters developed for WUR can be downloaded from <http://www.wur.nl/en/Expertise-Services/Facilities/Library/Students/EndNote/EndNote-filters-for-WUR.htm>. Store downloaded filters in the folder M:\My Documents\EndNote\Filters. For WUR Client users, these additional filters are included in EndNote.

- **(output) style**

A style is a file that contains information on how to arrange references for a wide variety of bibliographic formats. Styles format in-text citations, footnote citations and reference lists. They are specific for different journals, though they can also be based on more general style guides, such as the Chicago Manual of Style or the MLA Handbook. EndNote provides more than 6000 preconfigured styles, but it is also possible to create a new style. EndNote styles have the extension .ens (EndNote style).

Styles developed for WUR can be downloaded from <http://www.wur.nl/en/Expertise-Services/Facilities/Library/Students/EndNote/EndNote-styles-for-WUR.htm>. Store downloaded styles in the folder M:\My Documents\EndNote\Styles. For WUR Client users, these additional styles are included in EndNote.

- **format bibliography**

The EndNote command Format Bibliography arranges the information of your EndNote references in such a way that the in-text citations and reference lists appear in a specific journal style when writing a document.

- **connection file**

EndNote is able to provide access to remote online bibliographic databases or catalogues when the sources use the information retrieval protocol called Z39.50. For this process EndNote uses connection files. EndNote provides several connection files. Connection files have the extension .enz. A connection file developed for the WUR library catalogue can be downloaded from <http://www.wur.nl/en/Expertise-Services/Facilities/Library/Students/EndNote/EndNote-connection-files-for-WUR.htm>. Store this file in the folder M:\My Documents\EndNote\Connections. The latest version is available since December 22, 2011.

1.3 EndNote at WUR

WUR has a campus wide licence for EndNote. It is installed on all the PCs in educational rooms and buildings. Staff can download the software from Start > WUR > !Available software. For private use the software can be ordered online at Surfspot (<https://www.surfspot.nl/endnote-x8-medewerker.html>). The EndNote programme can also be used off campus via [MyWorkSpace](https://myworkspace.wur.nl) (<https://myworkspace.wur.nl>).

WUR Library supports the use of EndNote by introductory courses and WUR specific manuals. For WUR employees, the library creates EndNote support files. These additional styles, connection files and filters are not included in the programme itself. You can download these files from the URL <http://wageningenur.nl/library/endnote>. Transfer these additional EndNote files into the appropriate folders at M:\My Documents\EndNote\. Files are added or updated on a regular base.

For specific questions on the use of EndNote, please contact the library service desk (tel. 86666 or email servicedesk.facilities@wur.nl). You can also ask your information specialist <http://www.wur.nl/en/Expertise-Services/Facilities/Library/Researchers/Library-support.htm> for assistance.

2 Starting EndNote

Starting the programme depends on the way EndNote has been installed on your computer:

1. Double click the **EndNote** icon on the desktop area
2. Or: choose **All Programs** from the **Start** menu, select **EndNote** and then select **EndNote Program**
3. Or: Use Windows Explorer and select the drive and folder where the EndNote programme has been installed and (double) click on the file **EndNote.exe**

2.1 Create a new library

At first use, a dialog box appears named Welcome to EndNote (Figure 1) on starting EndNote. In later sessions this dialog box will be skipped and the most recently used library will be opened.

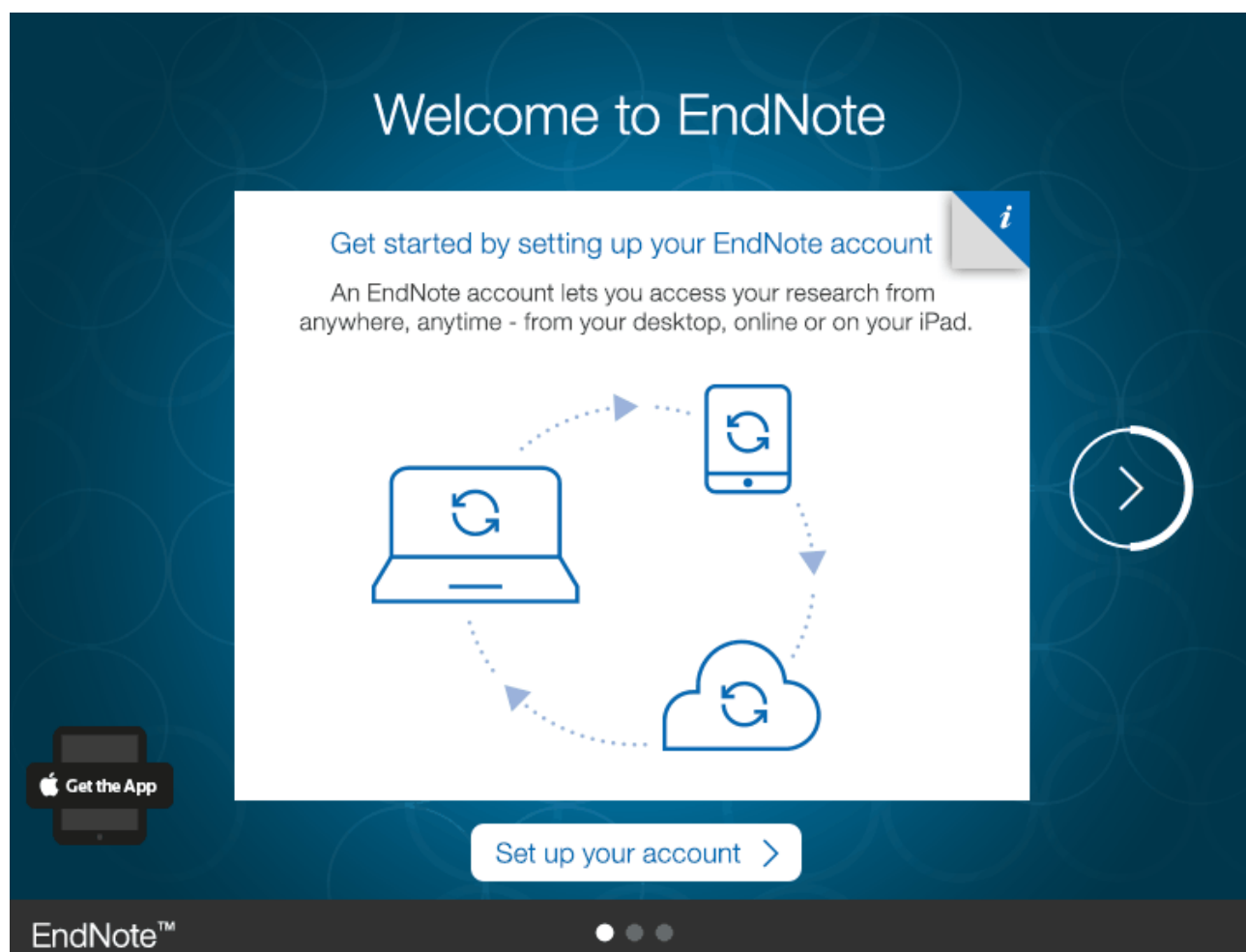


Figure 1. Welcome to Endnote dialogue box

Create a new library:

1. Click on the **File** menu and choose **New...** Figure 2 appears.
2. Select the drive and folder where you want to save the library from the **Save in** box
3. Enter the name of your new library in the **File name** box
4. Click the **Save** button. The new library appears as an empty EndNote library with "Showing 0 out of 0 reference" at the bottom of the window (Figure 3).

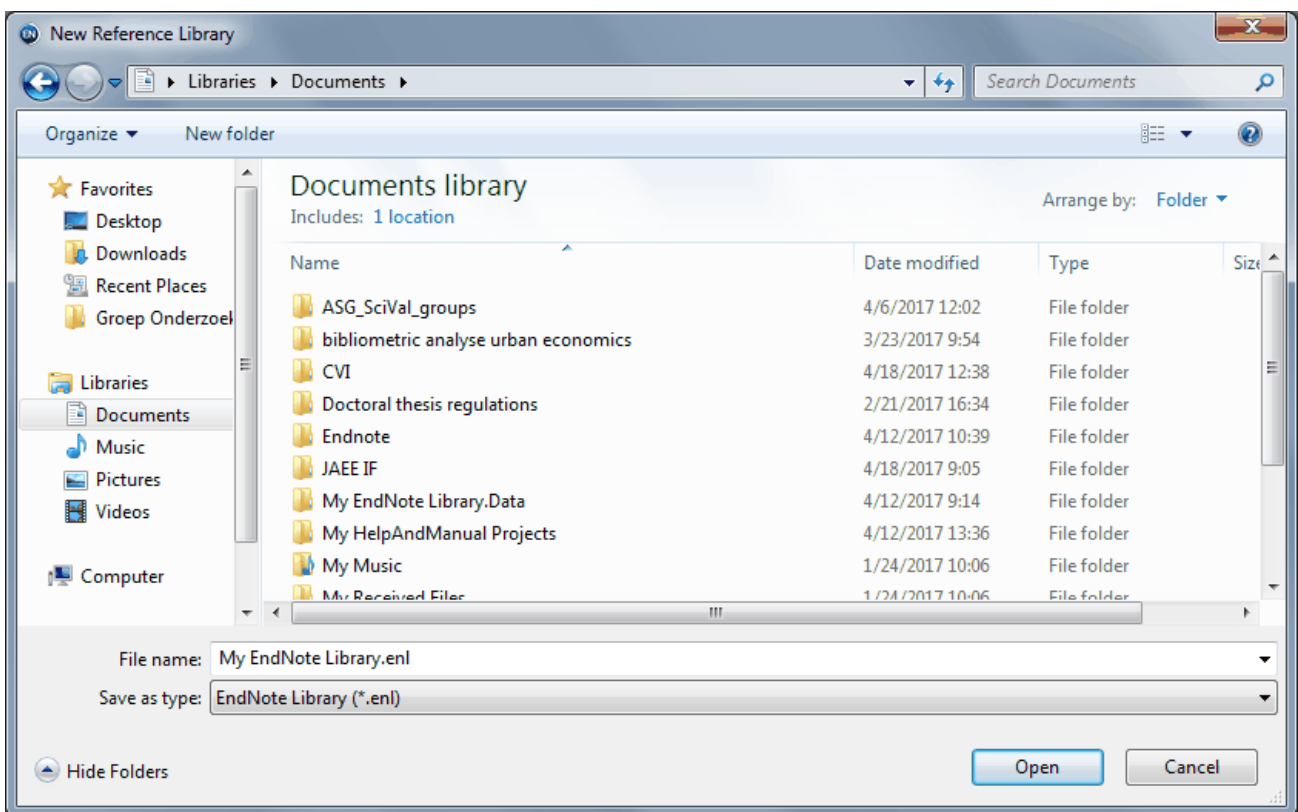


Figure 2. New library dialogue box

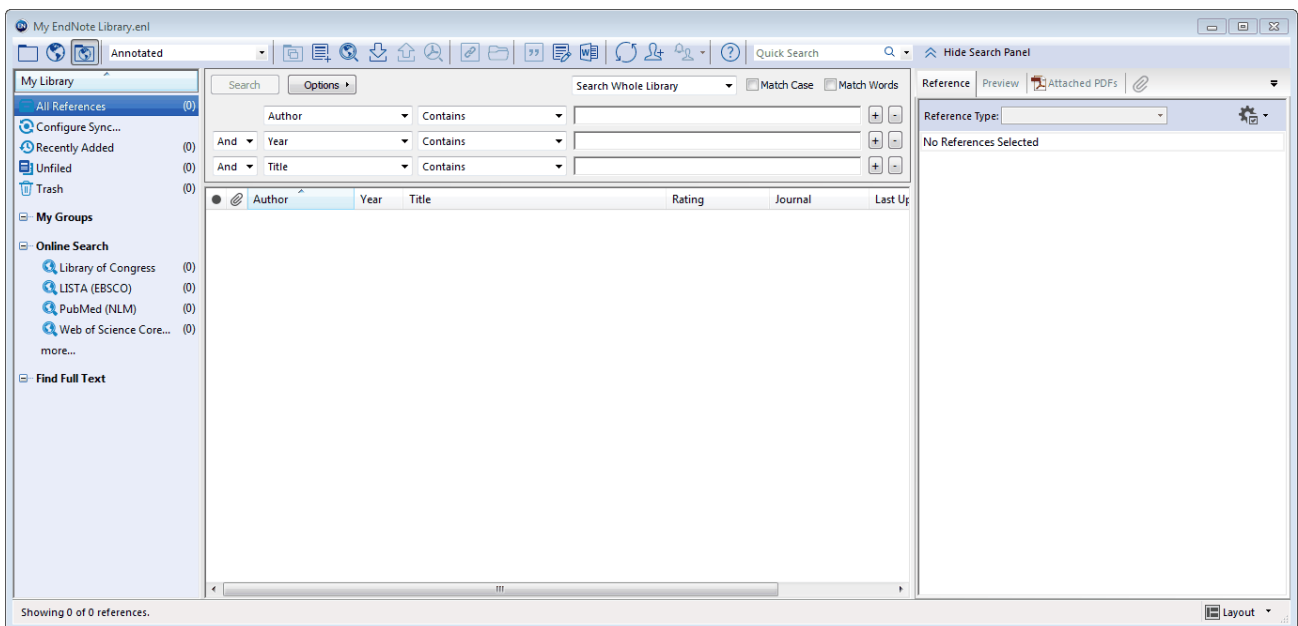


Figure 3. New library window

2.2 Open an existing library

Once a library has been created and saved, EndNote will remember that the library exists.

To open an existing library:

- From the **File** menu select **Open Library....** The saved library's file name should be displayed in the submenu. If the library is not displayed, locate the library file on your computer.

2.3 Preferences for opening libraries

When EndNote starts it will open the most recently used library. To change this default setting:

1. Choose **Preferences** from the **Edit** menu
2. Choose **Libraries** from the left menu in the window that pops up
3. Click on the arrow behind **When EndNote starts: Open the most recently used library**
4. Choose **Prompt to select a library** if you want to select a library from your folders.
5. Click **OK** to save the changes

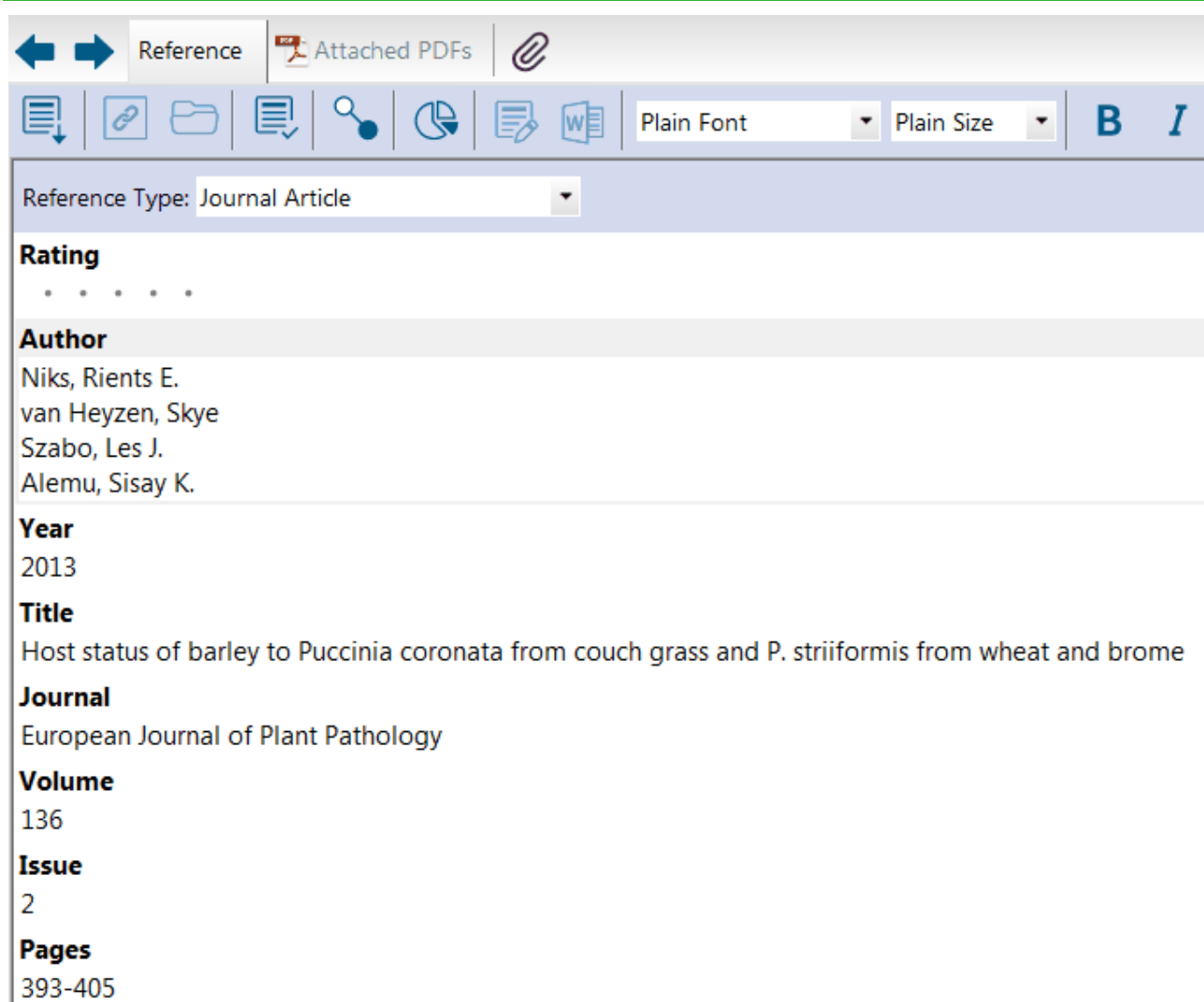
3 Add references to a library

There are several ways to add references to a library:

- You can [enter references manually](#)^[8] by **typing** the bibliographic information of a reference into the corresponding fields in EndNote.
- You can create new records from [PDF](#)^[17] files by importing a single file or a folder of files into your EndNote library.
- After performing a search in a bibliographic database, you can **export** your references to your EndNote library. When you choose Export after conducting a search, the EndNote programme will be opened and you will be asked to choose a library where you want the references to be placed. The references are then automatically transferred. In the background a [filter](#)^[4] is active. The export option is available in the databases [Web of Science](#)^[12], [Scopus](#)^[13] and [WUR library catalogue](#)^[13], all [Ovid](#)^[14], [EBSCOhost](#)^[15] and [ProQuest](#)^[16] databases, [Google Scholar](#)^[18], and on many publisher's websites.
- If the Export function is not available in the bibliographic databases or does not work properly, you need to save your results in a text-file after conducting a search in a bibliographical database. After that you **import** these results into your EndNote library with a database specific [filter](#)^[4]. This option is available for almost every database. In this manual, the procedure is described for [Orbit](#)^[22], [Ovid](#)^[23] and [PubMed](#)^[26].
- You can use [Online Search](#)^[27] in the EndNote programme. With Online Search, you conduct a search in bibliographic databases or library catalogues using the search system of EndNote. It is a convenient option for known references, but doesn't work for every database. The reason why online search is not working for all databases is that a connection file is needed for that database or that some databases require a log in account. To add references from a search in WUR Library catalogue by using the Online Search option, you need the connection file WUR_catalog_strict.enz. This connection file is not included in EndNote (except for WUR station users), but can be downloaded from <http://www.wur.nl/en/Expertise-Services/Facilities/Library/Students/EndNote.htm>. Store this file in the folder M:\My Documents\EndNote\Connections.

3.1 Enter references manually

1. Select **New Reference** from the **References** menu. A window appears with New Reference in the title bar. This window is called the New Reference window (Figure 4)
2. Select the appropriate reference type from the **Reference Type** drop down list (book, journal article, conference proceedings etc.)
3. Enter bibliographic data into the fields of the New Reference window. Use your mouse to select a field or use Tab to select the next field and Shift+Tab to select the previous field.



Reference Type: Journal Article

Rating

Author
 Niks, Rients E.
 van Heyzen, Skye
 Szabo, Les J.
 Alemu, Sisay K.

Year
 2013

Title
 Host status of barley to Puccinia coronata from couch grass and P. striiformis from wheat and brome

Journal
 European Journal of Plant Pathology

Volume
 136

Issue
 2

Pages
 393-405

Figure 4. New Reference window

Not all fields of the form need to be filled. The most important fields are discussed below.

- **Author**

There are several input options:

Niks, R.E.

Niks, Rients E.

R.E. Niks

Rients E. Niks

In case of multiple authors, each author should be entered on a single line. If an author has more than one initial, make sure that full stops or spaces separate the initials, otherwise EndNote will interpret the initials as a first name.

For complex author names, it is advised to enter the last name first:

van Heyzen, Skye

van der Heijden, Willem B.

van der Heijden, W.B.

de T. Alvim, Paulo

de T. Alvim, P.

Enter corporate names with a comma at the end:

Food and Agriculture Organization,

World Bank,

- **Year**

Complete the year with 4 digits: 2013

- **Title**

Font types and punctuation of the original title are generated automatically by EndNote when

formatting the references. Exceptions are the use of capitals (e.g. DNA) and letters in italics (e.g. names of species).

- **Journal**

Fill in the complete journal title: European Journal of Plant Pathology

- **Alternate journal**

Used for the abbreviated journal title. In this example: Eur. J. Plant Pathol.

- **Volume**

Fill in the volume number: 136

- **Issue**

Fill in the issue number: 2

- **Pages**

Do not use commas. Separate page numbers by a hyphen: 393-405

- **Label**

Optional.

- **Keywords**

Optional. Used to improve retrieval of relevant articles.

- **Abstract**

Optional. Used to provide a short summary.

- **(Research) Notes**

Optional. Used to make notes about the article.

- **DOI**

DOI stands for Digital Object Identifier and is a unique number for each electronic article. In this case: 10.1007/s10658-013-0174-y EndNote needs a DOI in order to be able to search for full text to attach to the EndNote library

- **URL**

Optional. Complete this field with a relevant link to the online version of the journal article. The journal opens in your Internet browser by clicking the link, or <Ctrl+g>.

Tip: You can make a stable link using the DOI number of the reference. Start with <http://doi.org/> and complete the address with the DOI number.

- **File attachments**

Optional. Used to link to a file of any format, e.g. pdf. By default, EndNote makes a copy of the file and places this file in a [library name].DATA/PDF folder. If you do not want this, read the item Selecting a

Relative Path or an Absolute Path for File Attachments in the Endnote Help menu .

4. Once you have completed the New Reference window, close the window by clicking the cross at the top right hand of your window. A dialog box appears in which you are prompted to save the changes you made (Figure 5). Click on **Yes**.

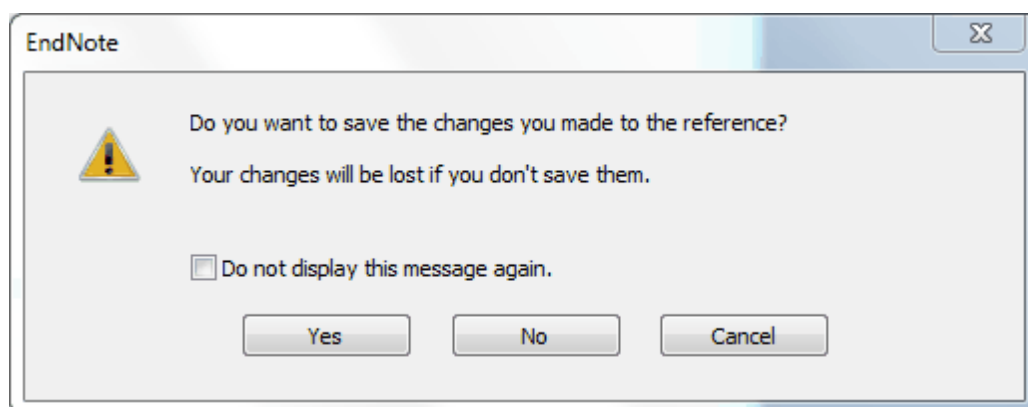


Figure 5. Warning to Save changes window

5. The Library window is shown, with references sorted by first author name, publication year or title (Figure 6). You can easily change the order by clicking on the column headings.

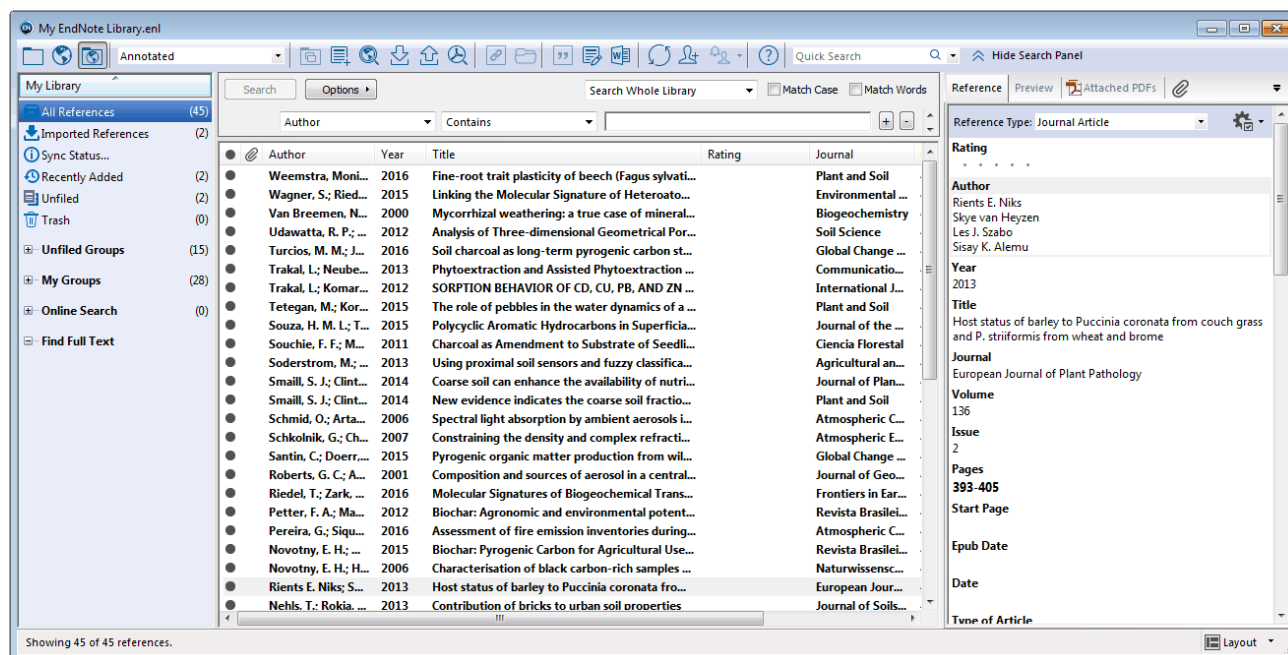



Figure 6. Library window

3.2 Import PDFs

You can create new records from PDF files by importing a single file or a folder of files into your EndNote library. EndNote uses metadata and DOI information to create a new reference and attaches the source PDF. Basic bibliography information will be added automatically for most journal articles, conference proceedings, conference papers, and reports.

To import a single PDF file:

1. Start EndNote. Create a new library or open an existing one.
2. Select **Import ...** from the **File** menu and choose **File...** or click on the import button . A pop up window named Import file appears (Figure 7).
3. Click **Choose file**. Complete the window with the drive, directory and the file name of the downloaded file.
4. Select **PDF** from the Import Option drop down menu.
5. Click **Import** and a reference will be made and shown in your Endnote library. A copy of the PDF is made and placed in the [library name].DATA/PDF folder

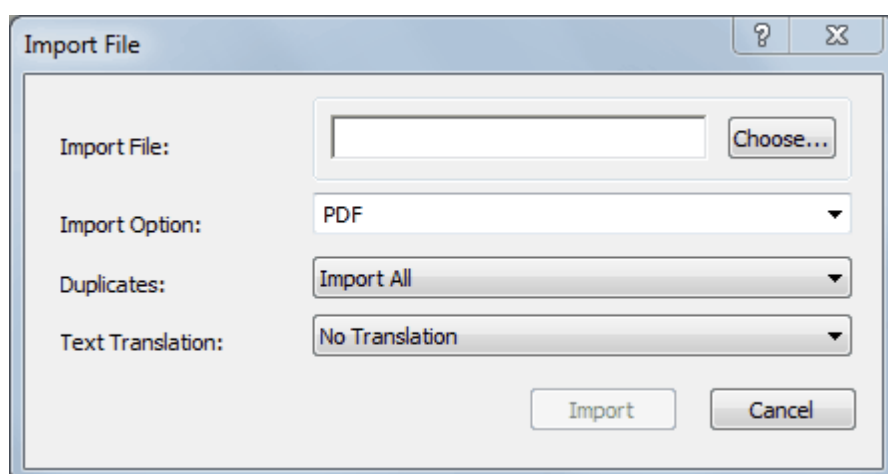


Figure 7. Import File window for importing a PDF file

To import a folder of PDF files:

6. Start EndNote. Create a new library or open an existing one.
7. Select **Import** from the **File** menu and choose **Folder....** A pop up window named Import Folder appears (Figure 8).
8. Click **Choose....** Complete the window with the drive, directory and the file name of the downloaded file.
9. Check or uncheck the option **Include files in subfolders** depending on your preferences.
10. Check or uncheck the option **Create a Group Set** for this import depending on your preference.
11. Select **PDF** from the Import Option drop down menu (the only option).
12. Click **Import** and a list of references will be made and shown in your Endnote library. A copy of the PDFs is placed in the [library name].DATA/PDF folder.

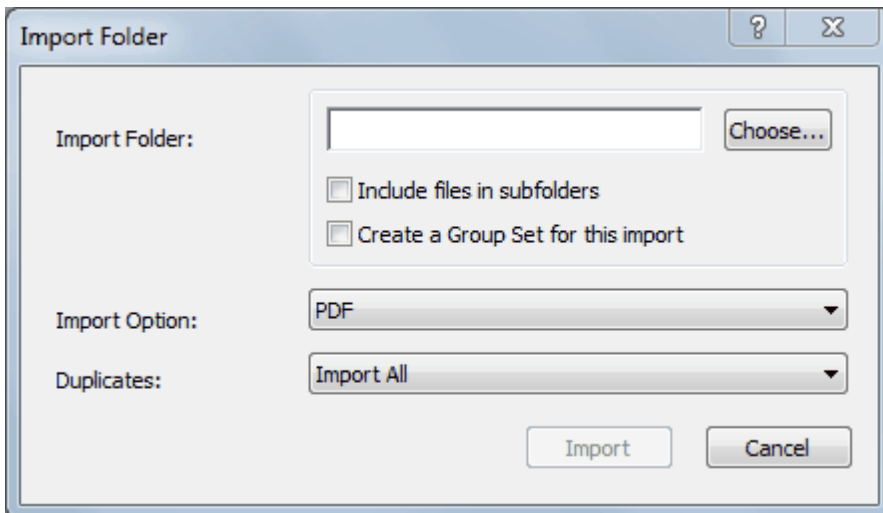


Figure 8. Import Folder window for importing multiple PDF files

3.3 Direct export from Web of Science

1. Start your browser and go to the [WUR Library \(http://www.wur.nl/en/expertise-services/Facilities/library.htm\)](http://www.wur.nl/en/expertise-services/Facilities/library.htm).
2. Scroll down to the list of Frequently used databases at the bottom of the page in the grey footer.
3. Select **Web of Science**.
4. Perform a search in Web of Science Core Collection .
5. Select individual records using the check boxes. If you want to export all records on page or another set of records to EndNote go to Save to EndNote online and change this option into Save to EndNote desktop. Then select **Full record** in **Record Content:**. (Figure 9).

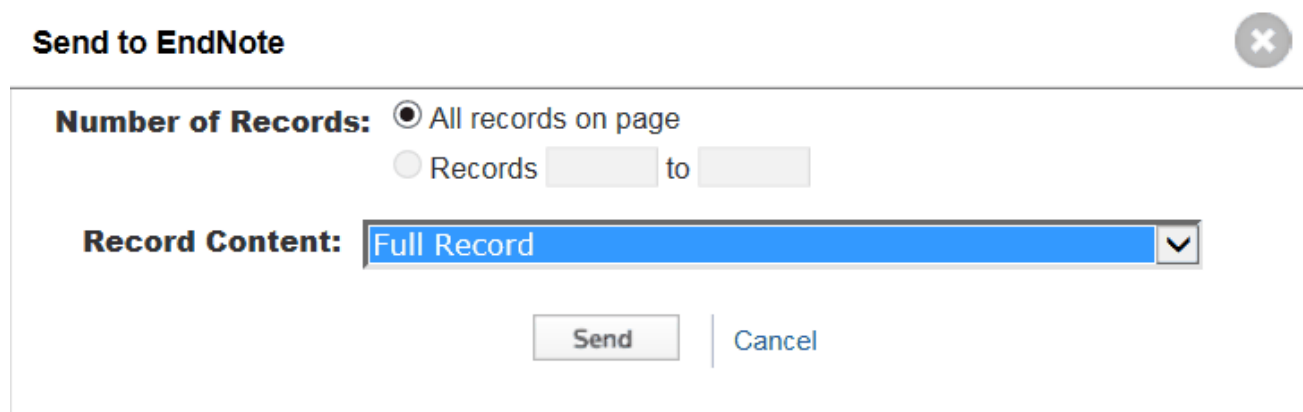


Figure 9. Output records frame in Web of Science

6. After the exchange of data has been completed, EndNote automatically starts. According to your [settings](#)^[7] the most recently used library will be opened or you will have to select the name of the library in which you want to store the references.
7. After the programme has finished uploading, a filled library is shown. Only the imported references are shown in the window. This window is called the Library window ([Figure 6](#)^[17]). By default, the library window displays the first author's last name, the year and the title of each reference. You can browse through the reference library by using the scroll bar, the scroll arrows, Page down,

- Page up, Home, End and Arrow keys. To see all references, click on the Group **All References**.
- Choose the **Preview** tab at the bottom of the Library window. Now the selected reference appears in the preview window in a chosen format.
 - Double click on a reference to edit the reference.

3.4 Direct export from Scopus

- Start your browser and go to the [WUR Library](#).
- Scroll down to the list of Frequently used databases.
- Select **Scopus**.
- Perform a search in Scopus
- Select individual records using the check boxes in front of the references or select all references on page or all references by clicking on the arrow next to **All**.
- Click on **Export**.
- Choose **RIS Format (EndNote, Reference Manager)**.
- Select all fields under the header **Bibliographical information** by checking the box in front of Bibliographic information.
- Check the box in front of **Abstracts and Keywords** when you want to export this information as well (Figure 10)
- Click **Export**. A screen appears confirming the exchange of data from Scopus to your local computer. Click on the **Open** button and choose EndNote.
- According to your [settings](#) the most recently used library will be opened or you will have to select the name of the library in which you want to store the references. The references will be transferred to your library.

Export document settings

You have chosen to export 4 documents

Select your method of export

☐ MENDELEY ☐ RefWorks ☐ SciVal ☒ RIS Format (EndNote, Reference Manager) ☐ CSV (Excel) ☐ BibTeX ☐ Text (ASCII in HTML)

What information do you want to export?

Customize export

<input checked="" type="checkbox"/> Citation information	<input checked="" type="checkbox"/> Bibliographical information	<input checked="" type="checkbox"/> Abstract and Keywords	<input type="checkbox"/> Funding Details	<input type="checkbox"/> Other information
<input checked="" type="checkbox"/> Author(s)	<input checked="" type="checkbox"/> Affiliations	<input checked="" type="checkbox"/> Abstract	<input type="checkbox"/> Number	<input type="checkbox"/> Tradenames and Manufacturers
<input checked="" type="checkbox"/> Document title	<input checked="" type="checkbox"/> Serial identifiers (e.g. ISSN)	<input checked="" type="checkbox"/> Author Keywords	<input type="checkbox"/> Acronym	<input type="checkbox"/> Accession numbers and Chemicals
<input checked="" type="checkbox"/> Year	<input checked="" type="checkbox"/> PubMed ID	<input checked="" type="checkbox"/> Index Keywords	<input type="checkbox"/> Sponsor	<input type="checkbox"/> Conference information
<input checked="" type="checkbox"/> Source title	<input checked="" type="checkbox"/> Publisher		<input type="checkbox"/> Funding text	<input type="checkbox"/> Include references
<input checked="" type="checkbox"/> Volume, Issue, Pages	<input checked="" type="checkbox"/> Editor(s)			
<input checked="" type="checkbox"/> Citation count	<input checked="" type="checkbox"/> Language of Original Document			
<input checked="" type="checkbox"/> Source and Document Type	<input checked="" type="checkbox"/> Correspondence Address			
<input checked="" type="checkbox"/> DOI	<input checked="" type="checkbox"/> Abbreviated Source Title			

Cancel Export

Figure 10. Selecting the fields to be exported from Scopus

3.5 Direct export from WUR Library Catalogue

- Go to the [WUR Library catalogue](http://library.wur.nl/WebQuery/clc) (<http://library.wur.nl/WebQuery/clc>).
- Perform a search.
- Click on **export** if you want to transfer all records (with a maximum of 250)
- A new window opens (Figure 11). Check the **RIS format** radio button and click on **export**.
- EndNote will be opened automatically. Select a library and open it. The catalogue records will be placed in this library.

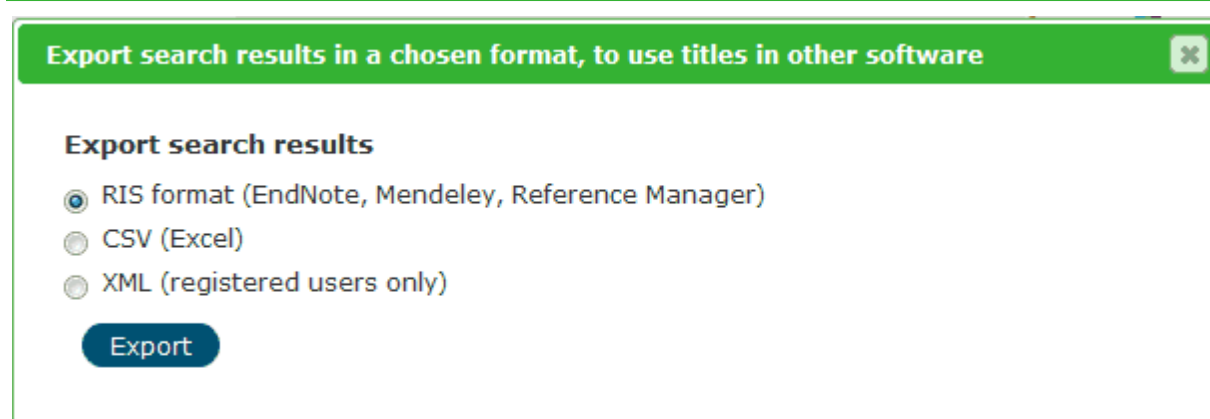


Figure 11. Exporting records window from WUR Library catalogue

Another option is:

1. Search the [WUR Library catalogue](#).
2. Check titles from the results list and go to **Marked list**.
3. A new window opens (Figure 12). Click on **export**.
4. A new window opens (Figure 11). Check the **RIS format** radio button and click on **export**.
5. EndNote will be opened automatically. Select a library and open it. The catalogue records will be placed in this library.

All titles in your marked list:

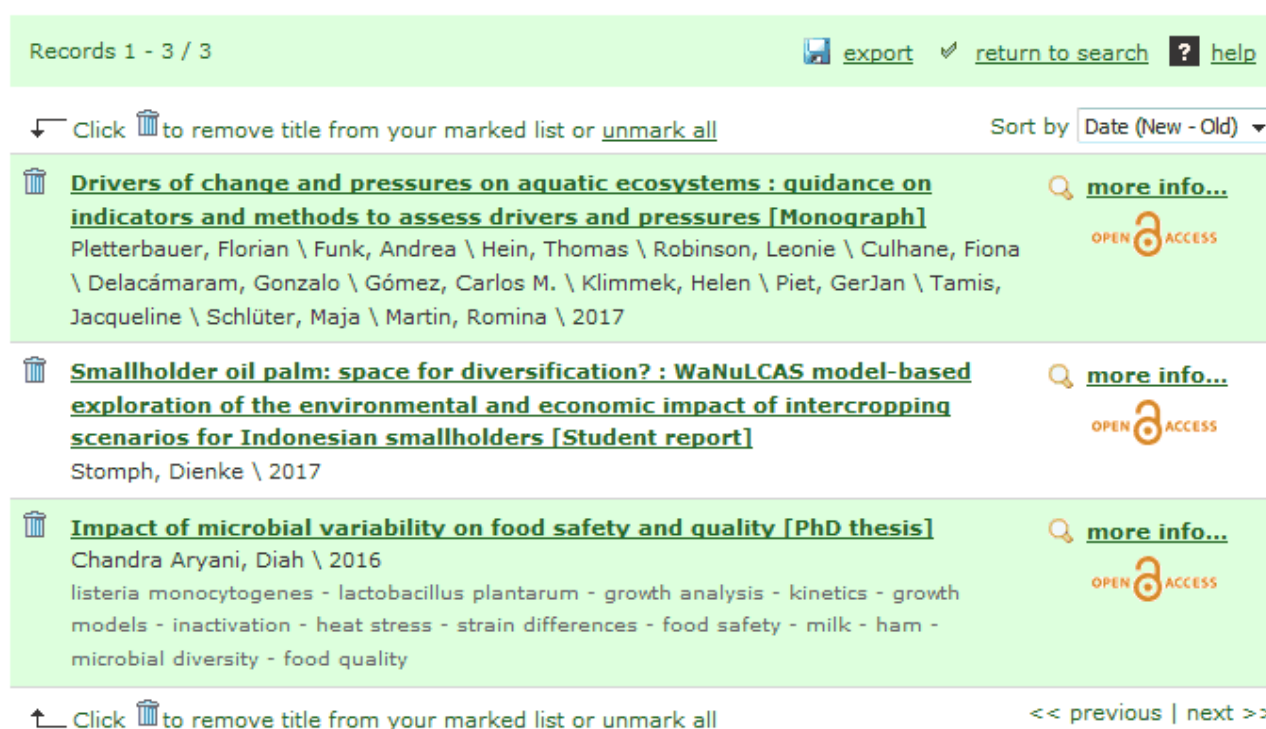


Figure 12. Exporting records window from marked list in Wageningen UR Library catalogue

3.6 Direct export from Ovid

1. Start your browser and go to the [WUR Library](#).
2. Scroll down to **Browse collections** and click on **Databases**.
3. Type "ovid" in the search box and go to the database
4. Choose a database from the list, e.g. Biological Abstracts or CAB Abstracts.
5. Perform a search.
6. Select individual records using the check boxes in front of the references or select all references by checking the checkbox at the top of the results list or select a range of references by typing the

- range in the Select Range box.
7. Click **Export**.
8. An export citation list appears. Complete this list as indicated in Figure 13. Select **EndNote**, then select **Complete Reference** and **Include URL**.
9. Click **Export Citation(s)**.
10. EndNote will be opened automatically. Select a library and open it. If a library is already open, the references will be transferred to this library.
11. If a window appears named Choose an import filter, Choose a filter with the name of the database and (OvidSP_WUR) in the file name, e.g. CAB Abstracts (OvidSP_WUR). If filters with these names are not available in the list, download them from the library website (see [Basic concepts](#))^[4].
12. If this procedure fails, try the option [Save+Import from Ovid](#)^[23].

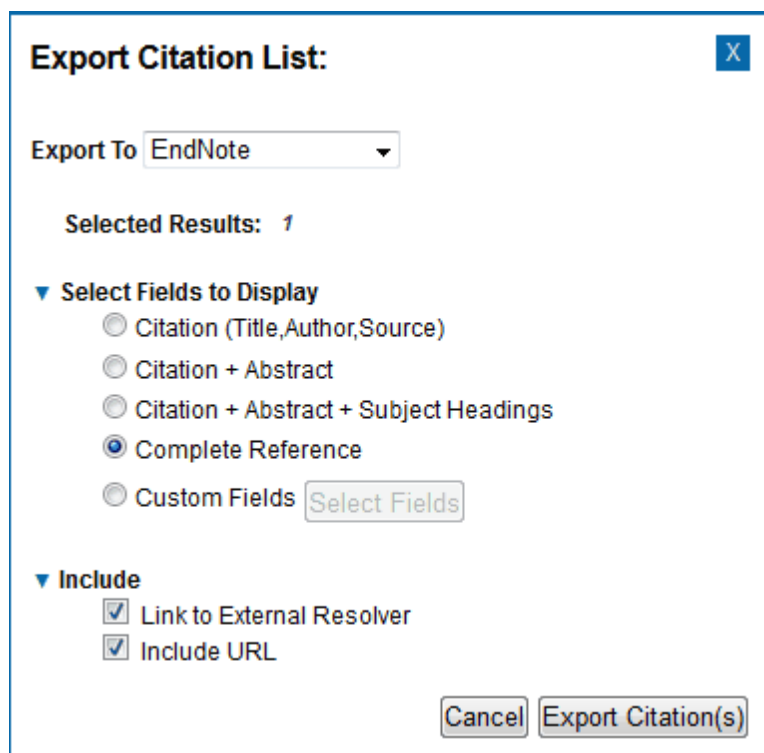


Figure 13. Export citation list from Ovid

3.7 Direct export from EBSCOhost

1. Start your browser and go to the [WUR Library](#).
2. Scroll down to **Browse collections** and click on **Databases**.
3. Type "ebSCO" in the search box and go to the database
4. Perform a search.

To download a single reference:

5. Click on the title of a reference to see the detailed citation information (Figure 14).

The screenshot shows the 'Detailed Record' page in EBSCOhost. The title is 'Organic farming and rural development: some evidence from Austria.' The author is 'Darnhofer, I.' The address is 'Department of Economic and Social Sciences, University of Natural Resources and Applied Life Sciences, Vienna, Vienna, Austria.' The source is 'Sociologia Ruralis 45 (4) Oxford: Blackwell Publishing, 2005, 308-323'. The language is 'English' and the country of publication is 'UK'. The abstract states: 'Organic farming is often considered beneficial for rural development through its role in alternative food chains, positive impact on landscapes and as an environmentally friendly production method. However, these need not be the only routes through which it can contribute to rural development. Results from an Austrian case study indicate that farmers also view organic farming as a way to disengage from commoditisation through a reorganization of on-farm resources. This allows farmers to move beyond the sole focus on production of raw materials for the food industry and undertake a wider variety of on-and off-farm activities. Conversion to organic farming could thus be a way of overcoming the shortcomings of the agricultural modernisation model, and implementing the rural development model proposed by the Wageningen School.' The number of references is 'many ref.' The left sidebar has links for 'Get it!', 'Find it in our Library', and 'Find Similar Results using SmartText Searching.' The right sidebar has a 'Tools' section with options: 'Remove from folder', 'Print', 'E-mail', 'Save', 'Cite', 'Export', 'Create Note', 'Permalink', and 'Share'.

Figure 14. Part of the detailed citation window in EBSCOhost

6. Click **Export**
7. The Export Manager window appears (Figure 15). Choose **Direct Export in RIS Format**.
8. Click **Save**
9. EndNote will be opened automatically. Select a library and open it. The selected record will be transferred.

The screenshot shows the 'Export Manager' window in EBSCOhost. It has a 'Save' button and an 'E-mail' link. Below the buttons, it says 'Number of items to be saved: 1'. Under the heading 'Save citations to a file formatted for:', there are several radio button options: 'Direct Export in RIS Format (e.g. CITAVI, EasyBib, EndNote, ProCite, Reference Manager, Zotero)' (which is selected), 'Generic bibliographic management software', 'Citations in XML format', 'Citations in BibTeX format', 'Citations in MARC21 format', 'Direct Export to RefWorks', 'Direct Export to EndNote Web', and 'Direct Export to EasyBib'. At the bottom, there are 'Save' and 'Cancel' buttons.

Figure 15. Completed Export Manager screen in EBSCOhost

All references from a page can be downloaded into EndNote after putting them in a folder first:

10. Put all references from a page into a folder by clicking on the Share button. Select for adding to folder Results 1-10. (Figure 16).

Refine Results

Current Search

Boolean/Phrase:
organic farming rural development

Limit To

1995 Publication Date 2016

Show More

Source Types

☒ All Results

☐ Academic Journals (58)

☐ Conference Papers (46)

Search Results: 1 - 10 of 75

Relevance Page Options Share

1. Organic farming potential for vital rural development

By: Dzhabarova, Y.; Lultcheva, I.; Agrarni Nauki; 4(9); Agricultural University, 2012, 39-42 (Journal Article)
Full Text from CABI: [Click here for CABI electronic resource](#)

Subjects: development policy; economic development; poverty; rural areas; rural development; socioeconomic conditions

[Get it!](#) [Find it in our Library](#)

2. The role of sustainable development and organic agriculture in preserving agriculture and rural values.

By: Birovljev, J.; Štavljanin, B.; International Scientific Development in Terms of the Republic of Serbia. Strategic Development of Rural Areas. Thematic Process of the Republic of Serbia; Belgrade: Institute of Agricultural Economics, 2014, 1-10 (Journal Article)
Full Text from CABI: [Click here for CABI electronic resource](#)

Subjects: agricultural development; development planning; farming; rural development; Serbia; Serbia

[Get it!](#) [Find it in our Library](#)

Add to folder :

[Results \(1-10\)](#)

Add search to folder:
[organic farming rural development](#)

Create an alert :

[E-mail Alert](#) [RSS Feed](#)

Use Permalink :

Persistent link to search (copy & paste)
<http://search.ebscohost.com/login.aspx?direct=true>

[More](#)

Export results :

[E-mail a link to download exported results \(up to 75\)](#)

Figure 16. Results list in EBSCOhost with Add to Folder options

11. Click on **Folder** in the blue menu bar on top of the page.
12. Select individual or select all references to be downloaded by checking the relevant checkboxes (Figure 17)

Folder Contents

[Back](#)

To store these items in the folder for a future session, [Sign In to My EBSCOhost](#).

Articles (18)

Images (0)

Videos (0)

Companies (0)

Pages (0)

eBooks (0)

audioBooks (0)

Notes (0)

Other Content Sources (0)

Persistent Links to Searches (0)

Saved Searches (0)

Articles

1-10 of 18

Page: 1 2

Name Page Options

☐ Select / deselect all [Delete Items](#)

☐ 1. **A long history of rural development support for organic farming.**

EU Rural Review; (18), Brussels: EN RD Contact Point, 2014, 15-18 (Journal Article), Database: CAB Abstracts

Subjects: agricultural policy; CAP; development programmes; funds; organic farming; rural development; support measures; European Union Countries; European Union Countries

[Get it!](#) [Find it in our Library](#)

Print

E-mail

Save as File

Export

Figure 17. Folder contents in EBSCOhost

13. Click **Export**
14. The Export Manager window appears (Figure 18). Choose **Direct Export to RIS Format**, and choose whether you want to remove the items from the folder after saving.
15. Click **Save**
16. EndNote will be automatically opened. Select a library and open it. The selected records will be transferred.

Tip: By default 10 results per page are shown. Go to Page Options and indicate how many references you want to be displayed. The maximum is 50.

Save E-mail

Number of items to be saved: 18

☐ Remove these items from folder after saving

Save

Save citations to a file formatted for:

- ☒ Direct Export in RIS Format (e.g. CITAVI, EasyBib, EndNote, ProCite, Reference Manager, Zotero)
- ☐ Direct Export to EndNote Web
- ☐ Generic bibliographic management software
- ☐ Citations in XML format
- ☐ Citations in BibTeX format
- ☐ Citations in MARC21 format
- ☐ Direct Export to RefWorks
- ☐ Direct Export to EasyBib

Figure 18. Export Manager screen in EBSCOhost accessed from Folder view

Exporting all references from a search is possible by sending an email with a link to a zipped file to yourself.

1. In the Search Results screen (Fig. 16) click on Share.
2. The last option is Export results: Email a link to download exported results. See Fig. 16.
3. Choose **RIS Format (e.g. CITAVI, EasyBib, EndNote, ProCite, Reference Manager, Zotero)**
4. After around 15 minutes you receive an email from ephost@epnet.com
5. Unzip the zipped file, save as a txt file, go to EndNote and import this txt file using the RefManRIS filter.

3.8 Direct export from Google Scholar

1. Start your browser and go to the [WUR Library](#).
2. Scroll down to Frequently used databases and select **Google Scholar**.
3. Choose **Settings**
4. Go to **Bibliography Manager** on the Scholar Settings page (Figure 19)
5. Mark **Show links to import citations into EndNote**
6. **Save** the settings
7. Perform a search in **Google Scholar**
8. Select a reference that you want to export to EndNote and click on the link **Import into EndNote**. Only basic bibliographic information will be downloaded into EndNote, no abstract, no keywords.

Google

Scholar Settings

Search results

Languages

Library links

Account

Button

Collections

☒ Search articles (☒ include patents).

☐ Search case law.

Results per page

10 Google's default (10 results) provides the fastest results.

Where results open

☐ Open each selected result in a new browser window

Bibliography manager

☐ Don't show any citation import links.

☒ Show links to import citations into

BibTeX

EndNote

RefMan

RefWorks

Save Cancel

To retain settings, you must turn on cookies

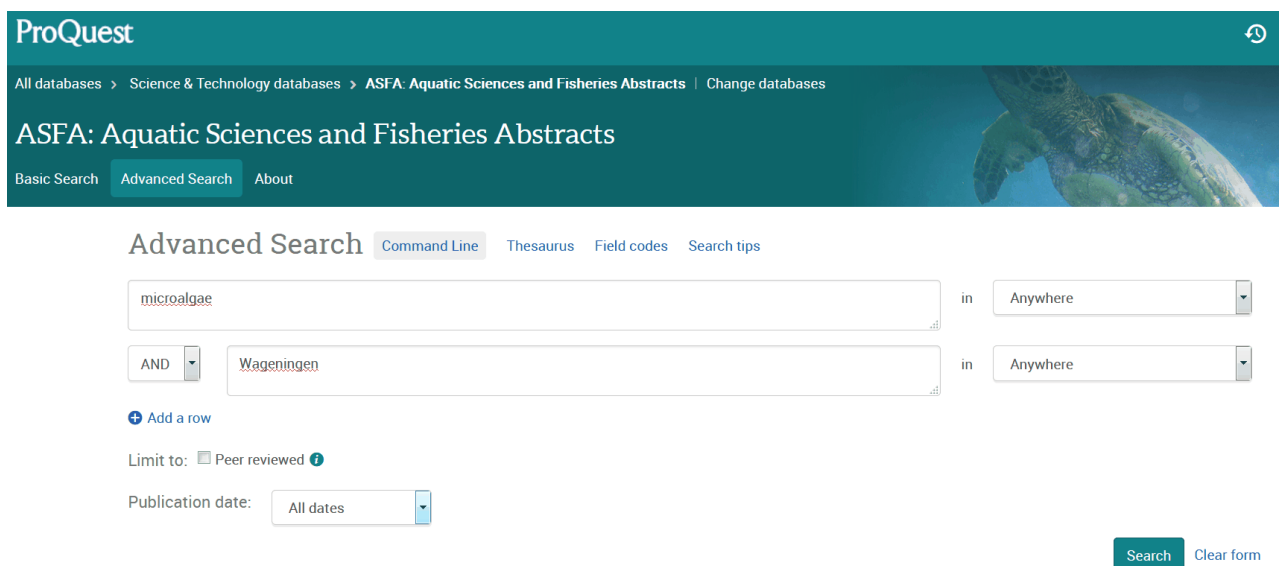
[About Google Scholar](#) [Privacy](#) [Terms](#) [Provide feedback](#)

Figure 19. Google Scholar Settings window

3.9 Direct export from ProQuest

ProQuest is the platform for ASFA (Aquatic Sciences and Fisheries Abstracts) and for ABI/INFORM Complete, Accounting & Tax, Banking Information Source, ProQuest Asian Business & Reference.

1. Start your browser and go to the [WUR Library](#).
2. Scroll down to **Browse collections** and click on **Databases**.
3. Type "proquest" or a database name (e.g. ASFA) in the search box
4. Perform a search in the selected database, in this case ASFA (Figure 20)
5. Select individual records using the check boxes in front of the references or select all references on page. Default is 20. You can change this number at the bottom of the page, the maximum is 100
6. Click on Save (Figure 21)
7. Select **RIS (works with EndNote, Citavi etc.)** and click on Continue. A new screen appears confirming the exchange of data from ProQuest to your local computer. Click on the Open button and EndNote starts automatically
8. According to your settings the most recently used library will be opened of you will have to select a the name of the library in which you want to store the references. The references will be transferred to your library



ProQuest

All databases > Science & Technology databases > ASFA: Aquatic Sciences and Fisheries Abstracts | Change databases

ASFA: Aquatic Sciences and Fisheries Abstracts

Basic Search **Advanced Search** About

Advanced Search [Command Line](#) [Thesaurus](#) [Field codes](#) [Search tips](#)

microalgae in Anywhere

AND Wageningen in Anywhere

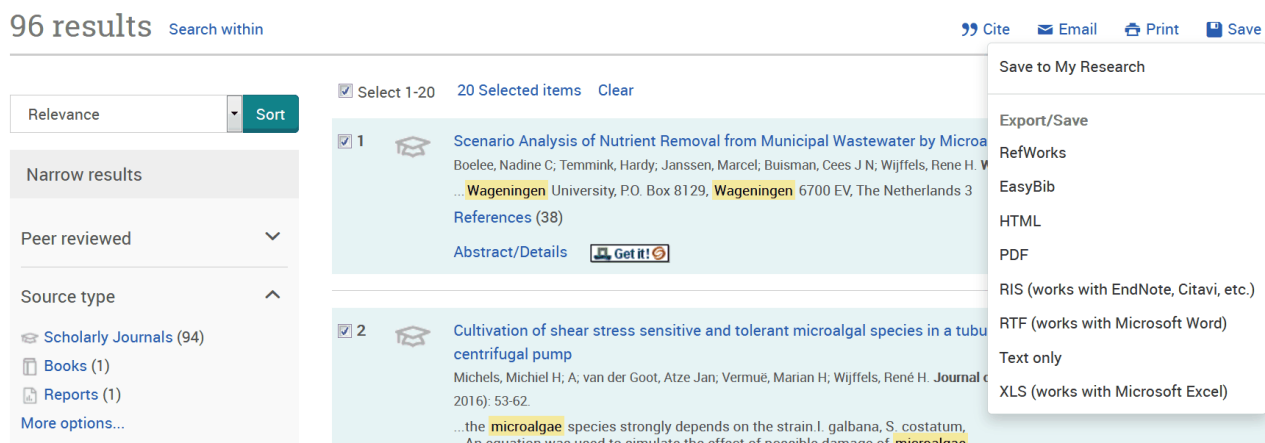
+ Add a row

Limit to: ☐ Peer reviewed ⓘ

Publication date: All dates

Search Clear form

Figure 20. ProQuest Advanced Search screen



96 results Search within

Cite Email Print Save

Relevance Sort

Narrow results

Peer reviewed

Source type

- Scholarly Journals (94)
- Books (1)
- Reports (1)
- More options...

Select 1-20 20 Selected items Clear

1 Scenario Analysis of Nutrient Removal from Municipal Wastewater by Microalgae
Boelee, Nadine C; Temmink, Hardy; Janssen, Marcel; Buisman, Cees J N; Wijffels, René H. V. *Water Science and Technology* 2016; 74(1): 1-10. Wageningen University, P.O. Box 8129, Wageningen 6700 EV, The Netherlands 3100 CA. References (38) Abstract/Details Get it!

2 Cultivation of shear stress sensitive and tolerant microalgal species in a tubular centrifugal pump
Michels, Michiel H; A; van der Goot, Atze Jan; Vermue, Marian H; Wijffels, René H. *Journal of Applied Microbiology* 2016; 121(1): 53-62. Wageningen University, P.O. Box 8129, Wageningen 6700 EV, The Netherlands 3100 CA. ...the microalgae species strongly depends on the strain. *I. galbana*, *S. costatum*, *Anabaena* sp. ... An equation was used to simulate the effect of possible damage of microalgae.

Save to My Research

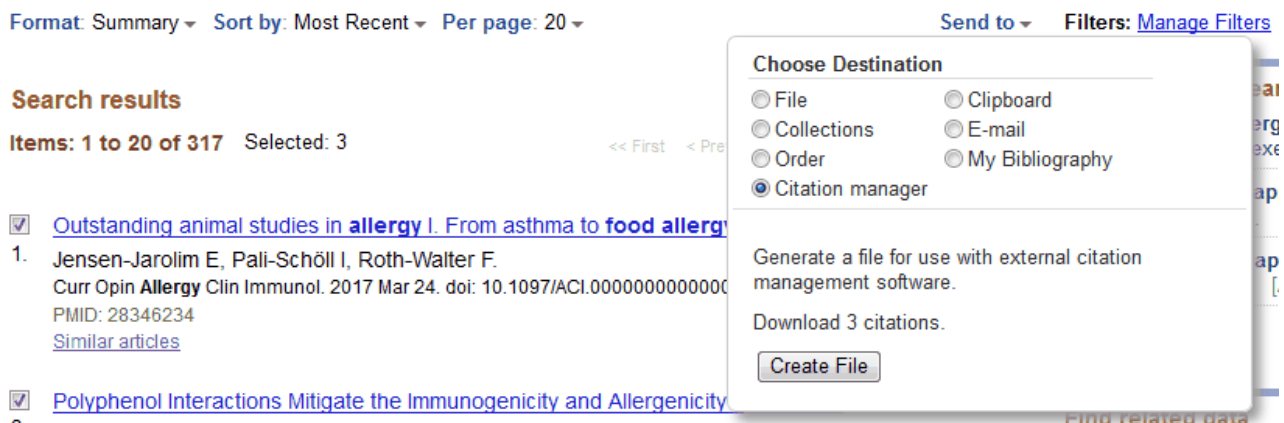
Export/Save

- RefWorks
- EasyBib
- HTML
- PDF
- RIS (works with EndNote, Citavi, etc.)
- RTF (works with Microsoft Word)
- Text only
- XLS (works with Microsoft Excel)

Figure 21. ProQuest direct export

3.10 Direct export from PubMed

1. Start your browser and go to the [WUR Library](#).
2. Scroll down to Frequently used databases and select **PubMed**.
3. Perform a search
4. Check references on the search results page and click on **Send to:**, if you don't check any references then all references will be sent to EndNote with a maximum of 200 at a time.
5. Choose Destination Citation Manager from the Send to drop-down menu. See Figure 22
6. EndNote will be opened automatically. Select a library and open it. The PubMed records will be put into this library. Sometimes you are asked for an import filter. If so, choose PubMed(WUR).



Format: Summary Sort by: Most Recent Per page: 20 Send to Filters: [Manage Filters](#)

Search results

Items: 1 to 20 of 317 Selected: 3

1. Outstanding animal studies in allergy I. From asthma to food allergy
Jensen-Jarolim E, Pali-Schöll I, Roth-Walter F. *Curr Opin Allergy Clin Immunol*. 2017 Mar 24. doi: 10.1097/ACI.0000000000000000. PMID: 28346234 [Similar articles](#)

2. Polyphenol Interactions Mitigate the Immunogenicity and Allergenicity of Food Allergens
Jensen-Jarolim E, Pali-Schöll I, Roth-Walter F. *Curr Opin Allergy Clin Immunol*. 2017 Mar 24. doi: 10.1097/ACI.0000000000000000. PMID: 28346234 [Similar articles](#)

Choose Destination

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

Generate a file for use with external citation management software.

Download 3 citations.

Create File

Figure 22. Direct export from PubMed Send to Citation Manager

3.11 Direct export from SciFinder

SciFinder is a bibliographic database covering all areas of chemistry and chemical engineering. First time users have to register.

1. Start your browser and go to the [WUR Library](#).
2. Scroll down to **Browse collections** and click on **Databases**.
3. Type "scifinder" in the search box, go to the database and log in.
4. Perform a search (Figure 23)

CAS Solutions ▼

SciFINDER
A CAS SOLUTION

Explore ▼ Saved Searches ▼ SciPlanner

REFERENCES

- Research Topic
- Author Name
- Company Name
- Document Identifier
- Journal
- Patent
- Tags

SUBSTANCES

- Chemical Structure
- Markush
- Molecular Formula
- Property
- Substance Identifier

REACTIONS

- Reaction Structure

REFERENCES: RESEARCH TOPIC ?

apple allergy

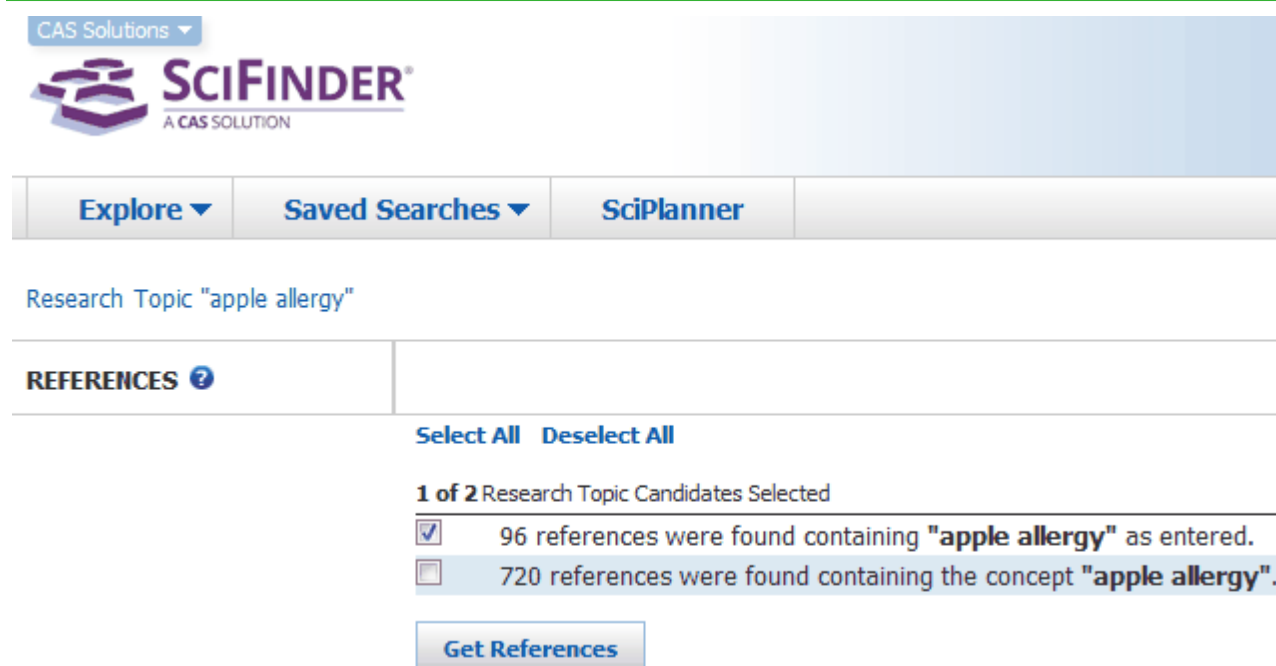
Examples:
The effect of antibiotic residues on dairy products
Photocyanation of aromatic compounds

Search

Advanced Search

Figure 23. SciFinder Search

5. On the next screen choose which search results you want to see. Click on Get References (Figure 24)



CAS Solutions

SCIFINDER
A CAS SOLUTION

Explore ▼ Saved Searches ▼ SciPlanner

Research Topic "apple allergy"

REFERENCES ?

Select All Deselect All

1 of 2 Research Topic Candidates Selected

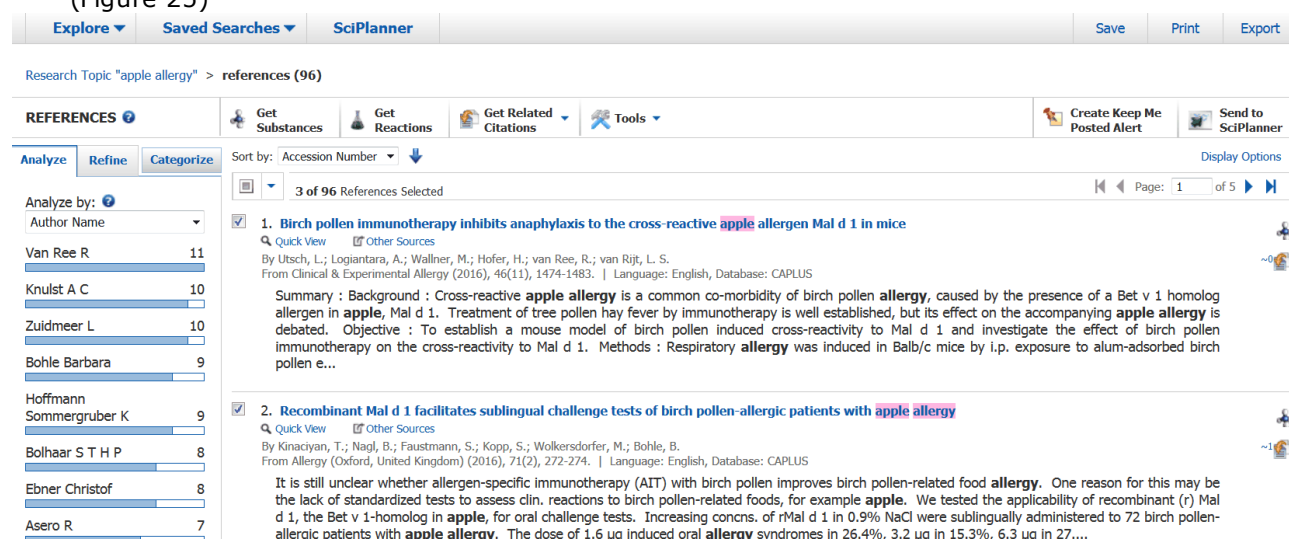
☒ 96 references were found containing "apple allergy" as entered.

☐ 720 references were found containing the concept "apple allergy".

Get References

Figure 24. SciFinder Get References screen

6. On the next screen: Select individual records using the check boxes or select all references (Figure 25)



Explore ▼ Saved Searches ▼ SciPlanner Save Print Export

Research Topic "apple allergy" > references (96)

REFERENCES ? Get Substances Get Reactions Get Related Citations Tools

Create Keep Me Posted Alert Send to SciPlanner

Analyze Refine Categorize Sort by: Accession Number

3 of 96 References Selected

1. **Birch pollen immunotherapy inhibits anaphylaxis to the cross-reactive apple allergen Mal d 1 in mice**
 Quick View Other Sources
 By Utsch, L.; Logiantara, A.; Wallner, M.; Hofer, H.; van Ree, R.; van Rijt, L. S.
 From Clinical & Experimental Allergy (2016), 46(11), 1474-1483. | Language: English, Database: CAPLUS
 Summary : Background : Cross-reactive **apple allergy** is a common co-morbidity of birch pollen **allergy**, caused by the presence of a Bet v 1 homolog allergen in **apple**, Mal d 1. Treatment of tree pollen hay fever by immunotherapy is well established, but its effect on the accompanying **apple allergy** is debated. Objective : To establish a mouse model of birch pollen induced cross-reactivity to Mal d 1 and investigate the effect of birch pollen immunotherapy on the cross-reactivity to Mal d 1. Methods : Respiratory **allergy** was induced in Balb/c mice by i.p. exposure to alum-adsorbed birch pollen e...

2. **Recombinant Mal d 1 facilitates sublingual challenge tests of birch pollen-allergic patients with apple allergy**
 Quick View Other Sources
 By Kinaciyan, T.; Nagl, B.; Faustmann, S.; Kopp, S.; Wolkersdorfer, M.; Bohle, B.
 From Allergy (Oxford, United Kingdom) (2016), 71(2), 272-274. | Language: English, Database: CAPLUS
 It is still unclear whether allergen-specific immunotherapy (AIT) with birch pollen improves birch pollen-related food **allergy**. One reason for this may be the lack of standardized tests to assess clin. reactions to birch pollen-related foods, for example **apple**. We tested the applicability of recombinant (r) Mal d 1, the Bet v 1-homolog in **apple**, for oral challenge tests. Increasing concns. of rMal d 1 in 0.9% NaCl were sublingually administered to 72 birch pollen-allergic patients with **apple allergy**. The dose of 1.6 µg induced oral **allergy** syndromes in 26.4%, 3.2 µg in 15.3%, 6.3 µg in 27....

Figure 25. SciFinder selecting references

7. Click on Export, on the right top of the page (Figure 25)
8. Select Citation export format (*.ris) on the Export page and click on Export
9. A screen appears confirming the exchange of data from SciFinder to your local computer. Click on the Open button and EndNote starts up automatically
10. According to your settings the most recently used library will be opened or you will have to select the name of the library in which you want to store the references. The references will be transferred to your library

3.12 Download+Import from Orbit

Download and import references from the Orbit patent database:

- [Create a download from Orbit](#)^[23]
- [Import an Orbit download into a library](#)^[23]


3.12.1 Create a download from Orbit

1. Start your browser and go to the [WUR Library](#).
2. Scroll down to **Browse collections** and click on **Databases**.
3. In the left-hand panel under **collections** choose **all databases**.
4. Type "orbit" in the search box and go to the database.
5. To enter the database click on Login (no sub account needed)
6. Perform a search in Orbit
7. Select individual records using the check boxes or select all by checking the checkbox on top of the hitlist (Figure 26)
8. Click on Export and choose Ris Export
9. In the next screen, click on **Finish** to download file.
10. Click on **Click here to download file**. You have the option to open the download directly in Endnote, or save the file.

#	Title	Publication number	Publ. date	1st App. date	Applicant/Assignee	Inventor(s)	CPC Codes	Relevance
1	Traditiona...	CN101698036	2010-04-28	2009-11-10	NANJING HOSPITAL OF TRADITIONAL CHINESE MEDICINE* NANJING UNIVERSITY OF CHINESE MEDICINE*	XINGDE ZHANG XUEPING ZHENG HONGLI YU QIN XIA YEHUANG WANG XINGPING LIU LINGLING ZHOU YOUCHUN LU		100 %
2	Traditiona...	CN102626510	2012-08-08	2012-05-10	CHINESE TRADITIONAL MEDICINE RESEARCH INSTITUTE OF TAIZHOU CHINA MEDICAL CITY* NANJING UNIVERSITY OF CHINESE MEDICINE*	CHEN LONG WANG ZHONGYUE WU HAO		99 %
3	Prepara...	CN103908512	2014-07-09	2013-01-08	SINOPHARM HOLDING SHENZHEN TRADITIONAL CHINESE MEDICINE*	SUN GUOYING HUANG CHAO LIU CANQUN SU LING LIU YADONG		99 %
4	Metho...	CN106334082	2017-01-18	2016-10-31	YUEYANG HOSPITAL OF INTEGRATED	ZHOU XUNJIE LU BO		99 %

Figure 26. Orbit export

3.12.2 Import an Orbit download into a library

1. Start EndNote. [Create a new library](#) ⁵¹ or [open](#) ⁶¹ an existing one.
2. Click on **File** and **select Import...** and then **File...** or click on the import button . A pop up window appears (Figure 30).
3. Click on **Choose** and find and select the file with the references you downloaded from Orbit.
4. Select **Other filters...** from the Import Option drop down menu. A list of import filters appears.
5. Select the Reference Manager (RIS) filter.
6. Click on the **Choose** button.
7. Click on the **Import** button in the Import File window (Figure 30). The conversion programme of EndNote starts. After the programme has finished the conversion, you will see a filled library (Figure 6) ¹⁷.
8. Note: If the import filter does not function properly ask your [information specialist](http://www.wur.nl/en/Expertise-Services/Facilities/Library/Researchers/Library-support.htm) (<http://www.wur.nl/en/Expertise-Services/Facilities/Library/Researchers/Library-support.htm>) for assistance.

3.13 Download+Import from Ovid

Download from bibliographies on the Ovid search platform:

- [Create a download from Ovid](#) ²⁴
- [Import an Ovid download into a library](#) ²⁵

3.13.1 Create a download from Ovid

1. Start your browser and go to the [WUR Library](#).
2. Scroll down to **Browse collections** and click on **Databases**.
3. Type "ovid" in the search box and go to the database
4. Choose a database from the list, e.g. Biological Abstracts or CAB Abstracts.
5. Perform a search.
6. Select individual records using the check boxes in front of the references or select all references by checking the checkbox at the top of the results list or select a range of references by typing the range in the Select Range box.
7. Click **Export**
8. An export citation list appears. Complete this list as indicated in Figure 27. Select **Reprint/Medlars**, then select **Complete Reference**, **Include URL**, and **Link to External Resolver**. **Include Search History** is optional.

Export Citation List:

Export To: Reprint/Medlars

Selected Results: 1

▼ Select Fields to Display

- ☐ Citation (Title, Author, Source)
- ☐ Citation + Abstract
- ☐ Citation + Abstract + Subject Headings
- ☒ Complete Reference
- ☐ Custom Fields Select Fields

▼ Include

- ☒ Link to External Resolver
- ☒ Include URL
- ☐ Search History

Cancel Export Citation(s)

Figure 27. Completed Export Citation List window to save results in Ovid

9. Click **Export Citation(s)**.

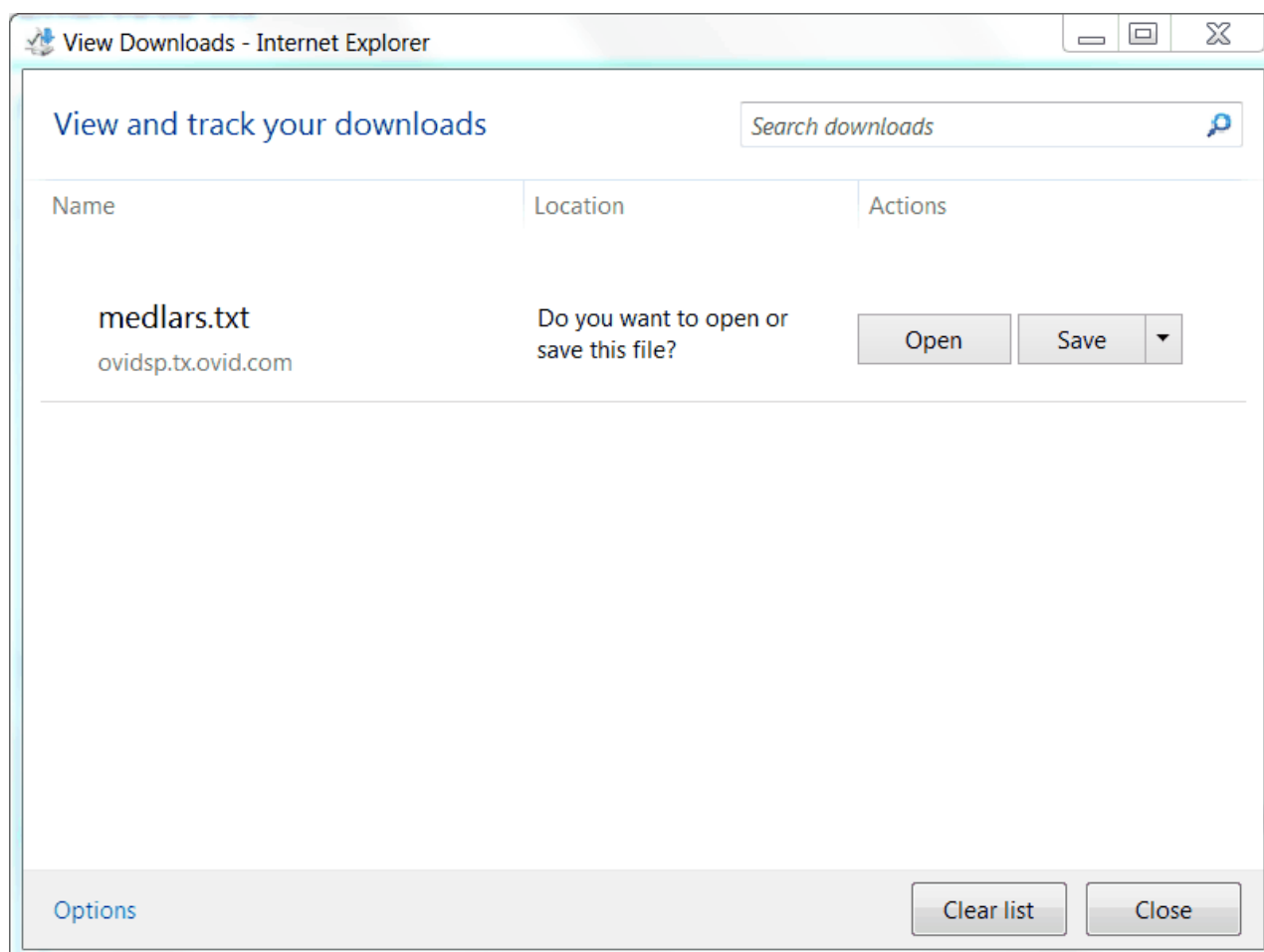



Figure 28. Ovid file download screen in Internet Explorer

10. Choose **Save** (Figure 28). The file will probably be stored in your Download folder.
11. Click **Close**.

3.13.2 Import an Ovid download into a library

1. Start EndNote. [Create a new library](#)^[5] or [open](#)^[6] an existing one.
2. Click on **File** and **select Import...** and then **File...** or click on the import button . A pop up window appears (Figure 29).
3. Click on **Choose** and find and select the file with the references you downloaded from Ovid.
4. Select **Other filters...** from the Import Option drop down menu. A list of import filters appears.
5. Select an OvidSP_WUR filter with the same name as the database you searched in, e.g. CAB Abstracts(OvidSP_WUR). When you cannot find the appropriate filter in the list, go to [Basic concepts](#)^[4] for instructions to download filters.
6. Click on the **Choose** button.
7. Click on the **Import** button in the Import File window (Figure 29). The conversion programme of EndNote starts. After the programme has finished the conversion, you will see a filled library ([Figure 6](#)^[1]).
8. Note: If the import filter does not function properly ask your [information specialist](#) for assistance.

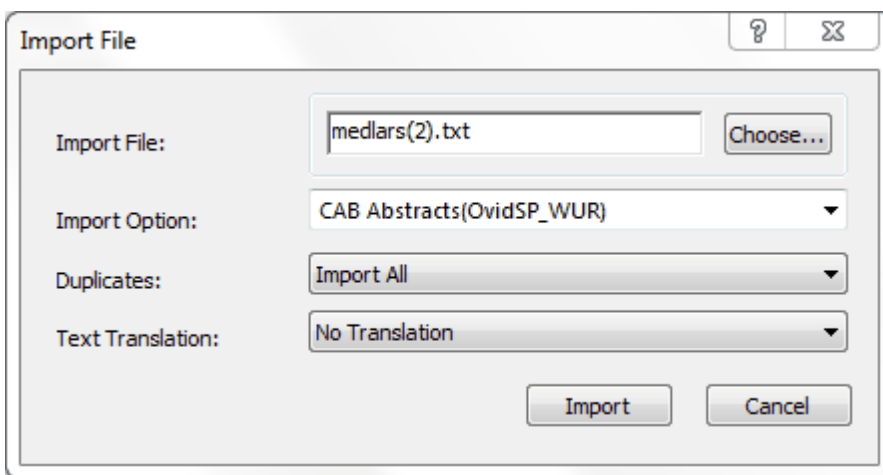


Figure 29. Import File window in EndNote

3.14 Download+Import from PubMed

Add references to your library with a download from PubMed:

- [Create a download from PubMed](#)^[26]
- [Import a PubMed download into a library](#)^[27]

3.14.1 Save results from PubMed

1. Start your browser and go to the [WUR Library](#).
2. Scroll down to Frequently used databases and select **PubMed**.
3. Perform a search
4. Check references on the search results page and click on **Send to:**
5. Choose File, change Format to MEDLINE (Figure 30)
6. Click on **Create File**

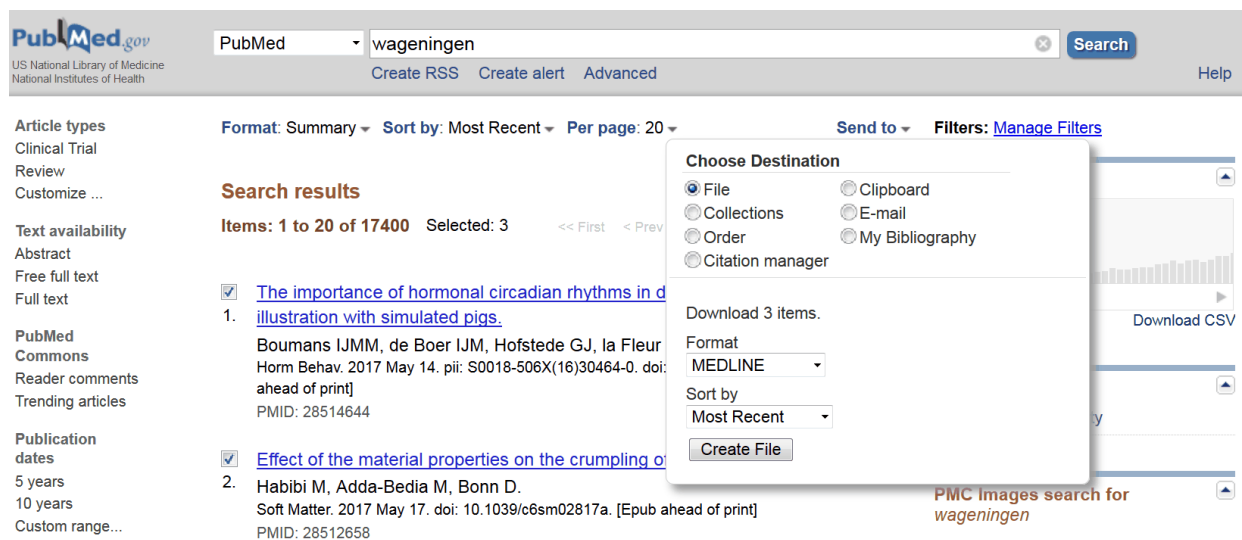


Figure 30. Search results page in PubMed and Send to menu

7. Select **Save File** in the pop-up screen (Figure 31). Your file will be saved to Downloads.

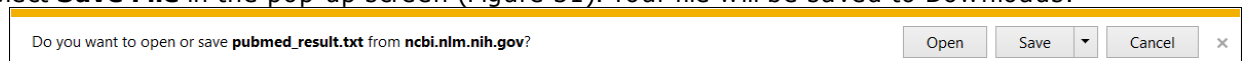



Figure 31. PubMed file download screen in Internet Explorer

3.14.2 Import a PubMed download into a library

1. Start EndNote. [Create a new library](#)^[5] or [open](#)^[6] an existing one.
2. Select **Import** from the **File** menu and choose **File...** or click on the import button . A pop up window named Import File appears.
3. Click on **Choose** and find and select the file with the references you downloaded from PubMed.
4. Select **Other files...** from the **Import Option** drop down menu. A list of import filters appears.
5. Select **PubMed(WUR)**. When you cannot find the appropriate filter in the list, go to [Basic concepts](#)^[3] for instructions to download filters.
6. Click **Choose**.
7. Click on the **Import** button in the Import File window (Figure 32). The conversion programme of EndNote starts. After the programme has finished the conversion, you will see a filled library ([Figure 6](#)^[1]).
8. Note: if the import filter does not function properly ask your [information specialist](#) for assistance.

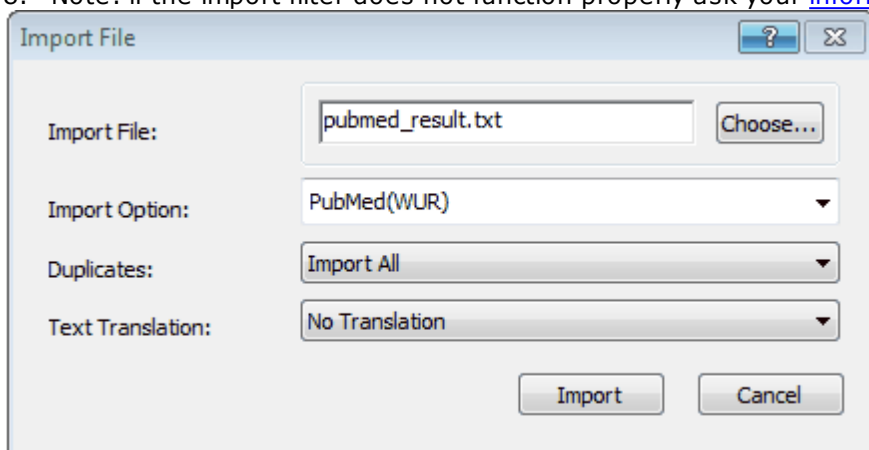


Figure 32. Import file window for PubMed files

3.15 Online Search

With the Online Search command in EndNote, you can search online bibliographic databases. The results of your searches can be downloaded either to a temporary EndNote library or directly into your own EndNote library.

- [Make a connection with an online database](#)^[27]
- [Search an online database](#)^[28]
- [Retrieve references from the database into an EndNote library](#)^[28]

3.15.1 Make a connection with an online database

1. Start EndNote. [Create a new library](#)^[5] or open an existing one.
2. Select **Online Search** from the **Tools** menu. A small pop-up window appears titled Choose A Connection.
3. Select a database you want to search in, e.g. **Cornell U** library catalogs.
4. Click on **Choose**. In Search on top of the page is indicated that searches will be performed in a Remote Library (Figure 33).

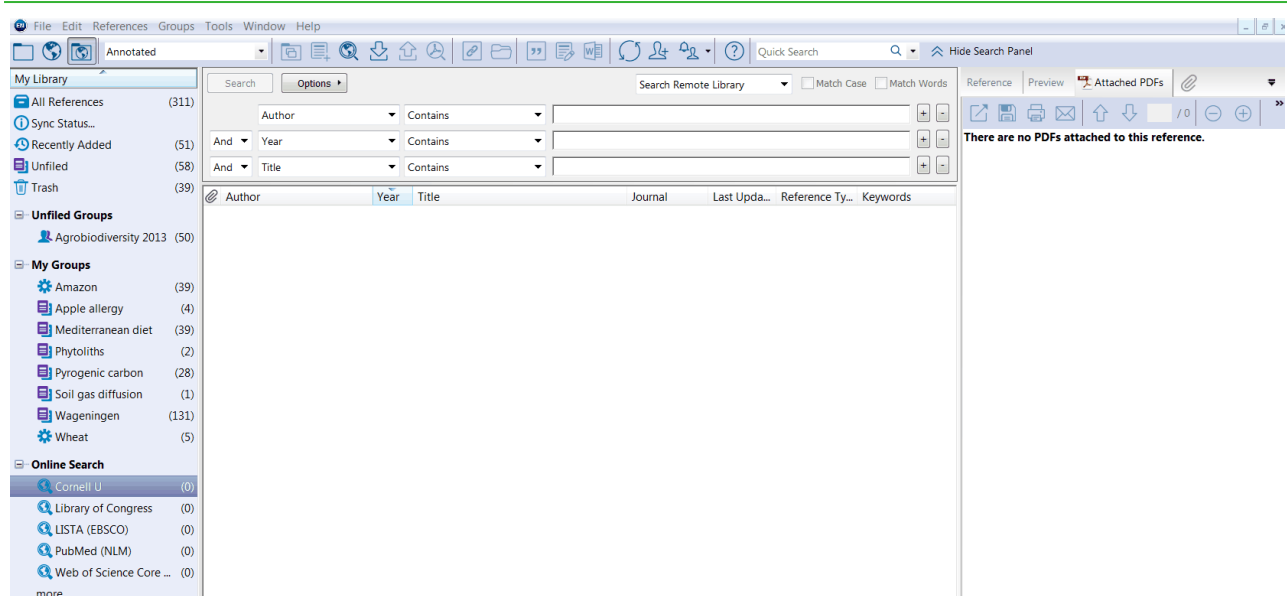


Figure 33. Window that opens on selecting a connection file

3.15.2 Search an online database

1. Enter your search terms in the Search frame (Figure 33)
2. Select **Any Field** from the drop-down menu next to **Author** and type a search term in the search box, e.g. **Mediterranean diet**
3. Click on the **Search** button. A pop-up window with Confirm Online Search in the title bar appears (Figure 34).
4. Click on the **OK** button

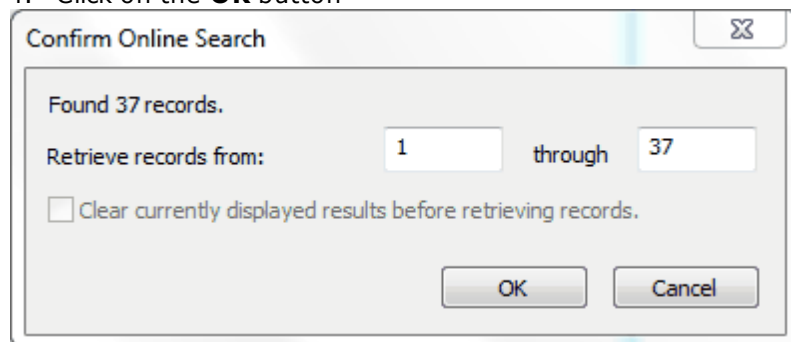


Figure 34. Confirm Online Search window

3.15.3 Retrieve references from the online database

1. After clicking on the **OK** button the library will be filled with references (Figure 35).
2. Make a selection of references that you don't want to keep by clicking on them. For multiple references hold down the <Ctrl> button on your keyboard.
3. Go to the **References** in the menu bar and choose **Move References to Trash**.
4. Now, you can continue searching the catalogue and retrieving references into EndNote.

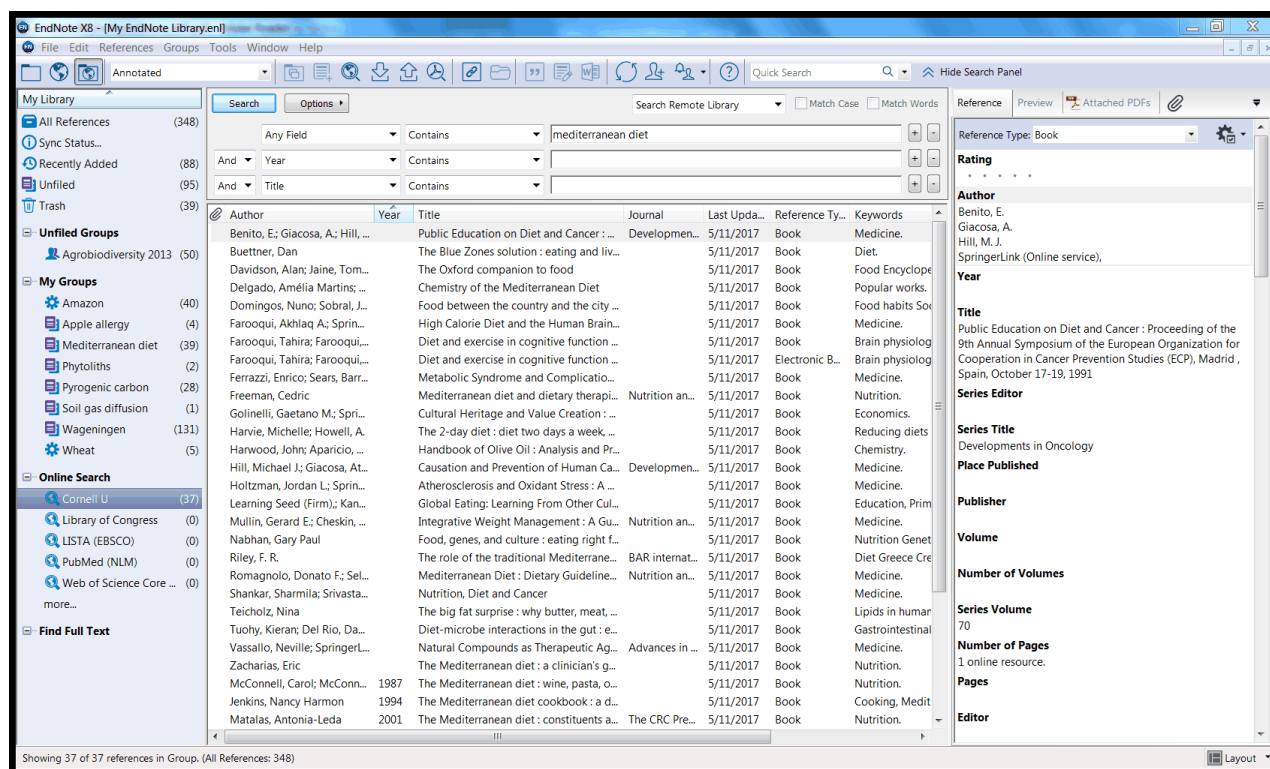





Figure 35. Connection window

- After you have finished searching the Cornell University catalogs, click on the group All References to view your entire EndNote library.

Note: If you would prefer to save references to a temporary library first, to verify which references you want to save, you have to search in the Online Search Mode.

- Select Online Search mode by clicking on the **Online Search Mode**  button.
- Make a connection with a database and search as described in the previous sections.
- The references are placed in a temporary library. You can place them in your EndNote library by selecting references and choosing **Copy References To** from the **References** menu. Choose a library to place them in and these references will be transferred.
- Click on the **Local Library Mode**  button or the **Integrated Library & Online Search Mode**  button to return to your EndNote library. With the last option you will empty the temporary Online Search Group.

4 Manage libraries

Managing libraries:

- [Transfer references between libraries](#)^[30]
- [Creating Groups](#)^[30]
- [Search](#)^[32]
- [Browse](#)^[32]
- [Specific searches](#)^[32]
- [Deduplicate](#)^[34]
- [Print references](#)^[36]
- [Share a library](#)^[36]

4.1 Transfer references between libraries

Transfer references from one library to another by using the **Copy** and **Paste** commands from the **Edit** menu:

1. Open both libraries and select **Tile Vertically** or **Tile Horizontally** from the **Window** menu to view both libraries
2. Select the references you want to copy by clicking and using the CTRL or SHIFT button. Use **Select All** (Ctrl+A) from the **Edit** menu to copy the complete library
3. Select **Copy** (Ctrl+C) from the **Edit** menu
4. Select the destination library where you want to add the references by clicking on the library window
5. Select **Paste** (Ctrl+V) from the **Edit** menu

4.2 Creating groups

Groups are an easy way to organize your library (Figure 36). There are two ways of creating groups:

- [Custom groups](#)^[31]
- [Smart groups](#)^[31]

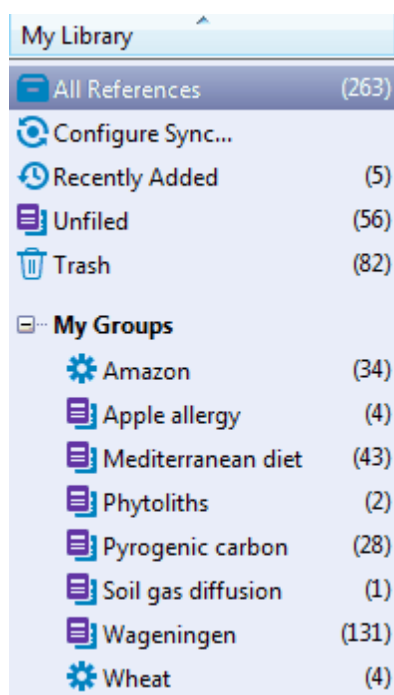


Figure 36. Part of the groups pane of the Library window.

4.2.1 Custom groups

You have two options of creating a custom group. You can select references and then add them to a new group, or you can create an empty group and then add references to it.

To create a custom group:

1. Choose **Create Group** from the **Groups** menu
 2. Type a name for the new group in the box appearing in the Groups pane of the library window
- or
1. Right click in the groups pane of the library window and choose **Create group**
 2. Type a name for the new group in the box appearing in the Groups pane of the library window
- or
1. Select references in a reference list
 2. Go to the **Groups** menu, choose **Add References To**, and then **Create Custom Group...**
 3. Type a name for the new group in the box appearing in the Groups pane of the library window

You can add references to your custom groups in different ways.

To add references to a custom group:

1. Select multiple references by holding down the SHIFT or CTRL key and clicking individual references. Or go to the **Edit** menu and choose **Select all** (Ctrl A).
 2. Drag and drop the selected references onto an existing custom group name in the Groups pane of the library window.
- or
2. Go to the **Groups** menu, choose **Add References To**, and select the name of an existing custom group.

Note: It is possible to have one reference in two or more groups. If you delete references from your custom group they are not deleted from your library.

4.2.2 Smart groups

Smart groups are built with search strategies. Smart groups are dynamically updated as you add references to or edit references in the library.

To create a smart group:

1. Go to the **Groups** menu and choose **Create Smart Group**. A search dialogue appears (Figure 37).
2. Type a name for the group in the box behind **Smart Group Name**:
3. Enter your search and click **Create**

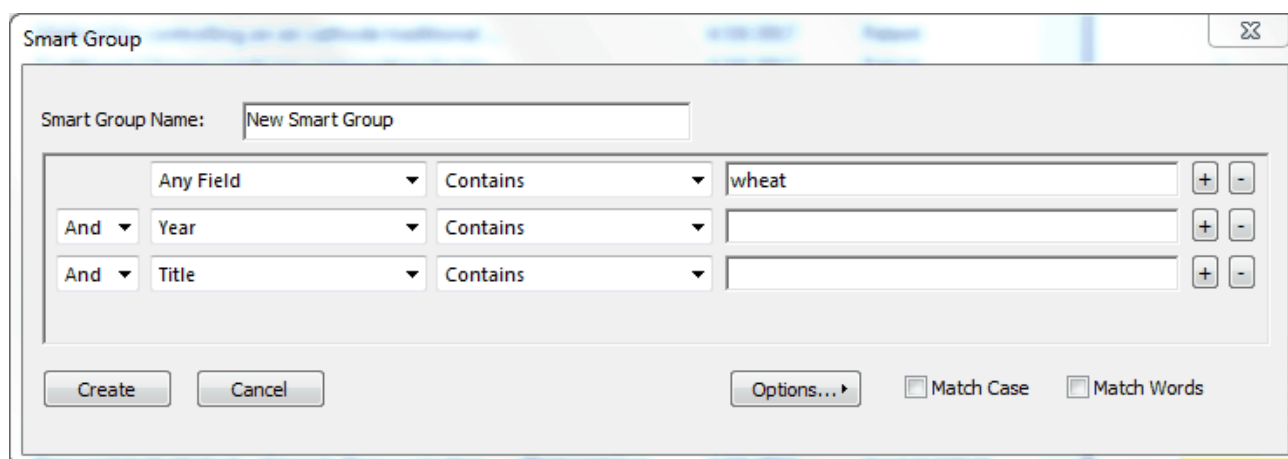


Figure 37. Search window for creating a smart group

To edit a smart group:

1. Select the smart group name below My Groups in the left frame
2. Go to the **Groups** menu and choose **Edit Group....** A search dialogue appears with the current search strategy (Figure 38).
3. Modify the search strategy and click **Save**

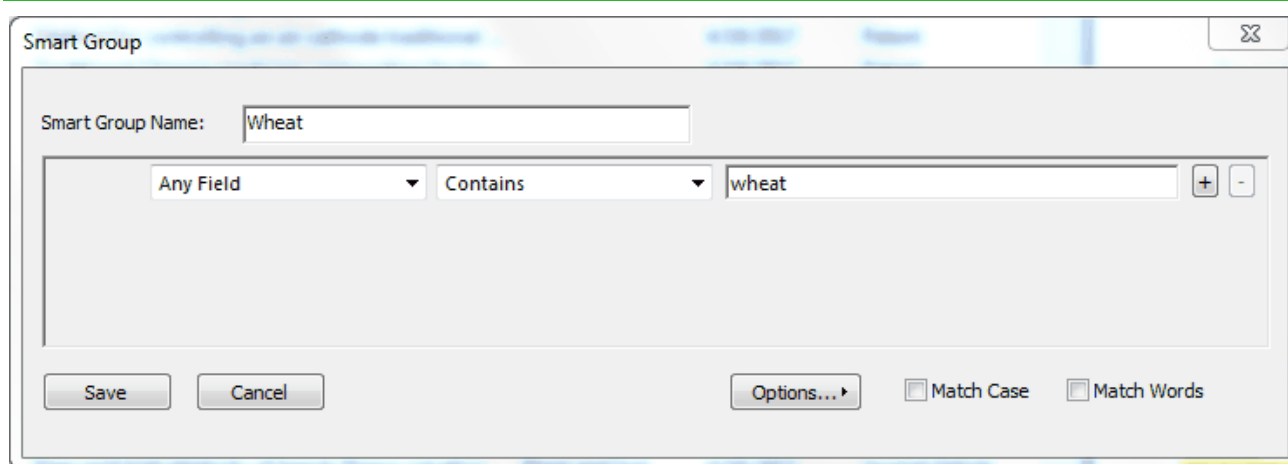


Figure 38. Search window for editing a smart group

Note: If you delete references from your smart group, you also delete them from your library.

4.3 Search

In an open library you can browse or search for specific references:

- [Browse](#)^[32]
- [Specific searches](#)^[32]

The Search Panel is displayed right below the main tool bar. If not, click on Show Search Panel in the menu bar.

4.3.1 Browse

There are a number of ways to browse through your references.


1. Use the vertical scroll bar at the right-hand side of the window. Or use the navigation keys on the keyboard: Page up, Page down, Home, End, ↑ and ↓ keys.
2. Change the order of the references by clicking on the column headings. Click a second time to obtain the reverse order.
3. Typing the first letter(s) brings you to the author's last name starting with that letter(s), when the references are sorted by Author. This also works for other fields.

To change the fields displayed in the library window:

1. Select **Preferences...** from the **Edit** menu
2. Select **Display Fields**
3. Select the fields you want to display in the library window (up to 10 fields)

4.3.2 Specific searches

EndNote provides Search commands to locate specific references or groups of references. In this manual only basic principles are discussed. Detailed information on specific searches can be found in

the Endnote help menu .

(To test the following examples, you can use the example Endnote library located at: C:\Program Files (x86)\EndNote X8\Examples\styletest(WUR).enl

Open the library C:\Program Files (x86)\EndNote X8\Examples\styletest(WUR).enl, and work in this library if you want to use the example to test specific searches)

To quickly search your entire library including the attached pdf's, use the Quick Search item (Figure 39) on the Main toolbar.

1. Enter a word or phrase in the Quick Search box and press ENTER.

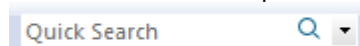


Figure 39. Quick Search box on the main toolbar

To perform more specific or complicated searches, use the search panel:

1. Go to the Search Panel right below the main tool bar (Figure 40).

2. Enter search terms in the Search boxes. A search term can be restricted to a single field, e.g. searching for Billoski in the author field.
3. Combine search terms by Boolean operators **And**, **Or** and **Not**. Select these operators from the drop down menus in front of each search line. By default the And operator is selected.
4. Add, insert or delete search lines by clicking the **+** and **-** buttons. By default three search boxes are shown (Figure 40).

Search for an author:

5. Click on a search field and select **Author**. Enter Billoski in the Author field
6. Click on the **Search** button and references which conform to the search criteria will be shown in the library window.
7. Select **Show All References** (Ctrl+M) from the **References** menu, or click on the All References group, to return to the full set of references

Figure 40. Search window with Billoski in the author field

Search for multiple authors:

8. When you want to perform a search with more terms, you enter the terms in separate boxes. The combination of the terms with AND, OR, or NOT will be performed from the top to the bottom of the Search window. EndNote searches by combining the results of the first two terms with the third search term. This means that a search for references from the authors Billoski and Whiting or from the authors Billoski and Schwartz should look like Figure 41. ["(Billoski AND Whiting) OR (Billoski AND Schwartz)" is the same as "(Whiting OR Schwartz) AND Billoski"]

Figure 41. Search window with multiple authors and the use of Boolean operators

Search for journal articles:

9. Select **Reference Type** from the drop down menu, enter Journal Article into the Search box and click on the **Search** button. 12 Journal articles are included in the library C:\Program Files (x86)\EndNote X8\Examples\styletest(WUR).enl.

Search for non-journal articles (i.e. books, book chapters, theses etc.):

10. Select **Reference Type** from the drop down menu, enter Journal Article into the Search box, select **Omit from showing reference** from the drop down menu of the search set list and click on the **Search** button (Figure 42). 11 items that are not Journal Articles are included in the library C:\Program Files (x86)\EndNote X8\Examples\styletest(WUR).enl.

Figure 42. Search window with Omit from showing references selected

Search for a range of years:

11. Select Year from the drop down menu, enter **2000** in the search box and choose **Is greater than or equal to** instead of Contains from the drop down menu (Figure 43) to obtain references published in 2000, 2001, etc..(Select **Search Whole Library** again instead of Omit from showing reference).

Figure 43. Search window with range of publication years

4.4 De-duplicate

If you collect references from various sources, you may have duplicate references in your libraries. You can remove these duplicates from the EndNote library.

To remove duplicates:

1. Make sure that the library window shows all references. If not, go to the **References** menu and choose **Show all references**, or click on the All References group.
2. Click on **References** in the menu bar and subsequently on **Find Duplicates**.
3. A window named Find Duplicates appears (Figure 44) where you can compare two references, transfer information from one reference to another and select which one you want to keep (Click on **Keep This Record**).
4. Choose **Skip** if you want to keep both
5. Choose **Cancel** if you want to see the whole list of duplicate references.

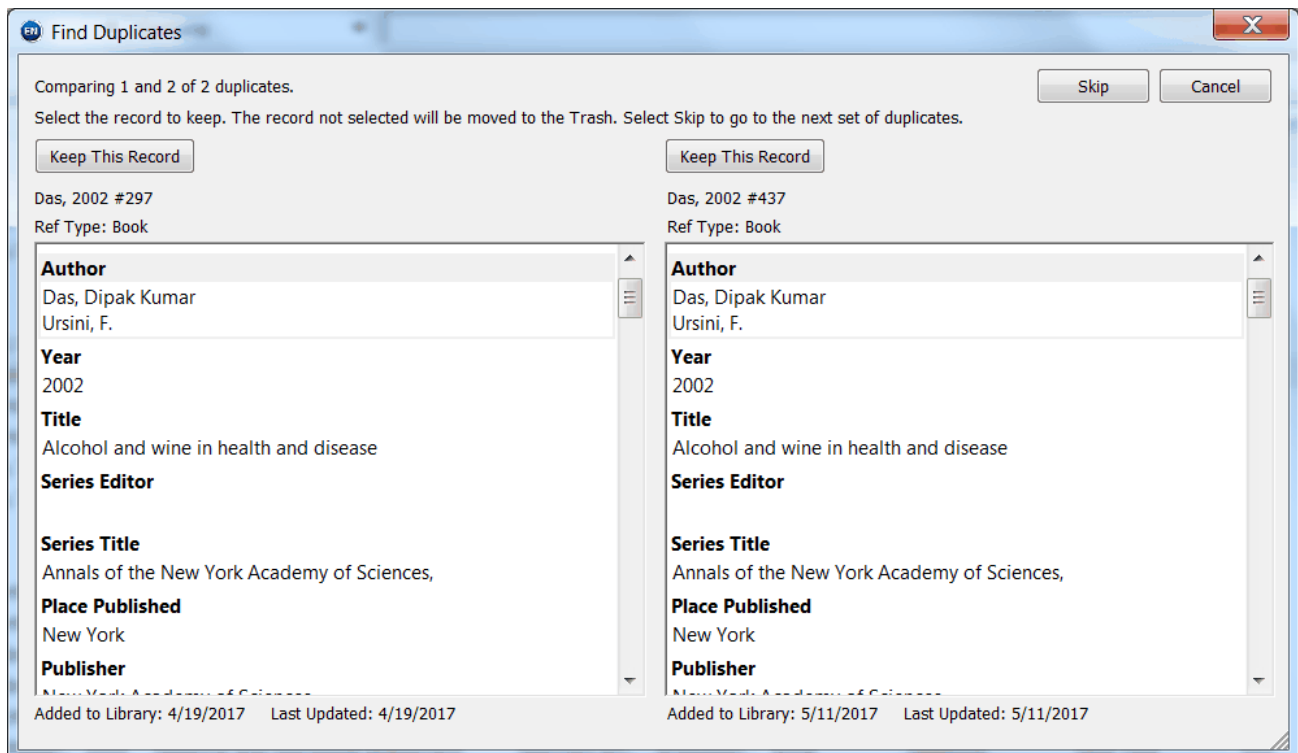


Figure 44. Find Duplicates window

6. If you chose Cancel, EndNote will display a temporary group named **Duplicate References**. All references in this group are highlighted. According to the de-duplication criteria these references are duplicates (Figure 45).
7. It is recommended to check duplicates before deleting. By holding the CTRL button and using the mouse changes in the selection of references can be made.
8. Click on **References** in the menu bar and select **Move References to Trash** (Ctrl+D) to delete all highlighted references
9. To return to the complete library, select **Show All References** (Ctrl+M) from the **References** menu or click on the All References group in the left frame.

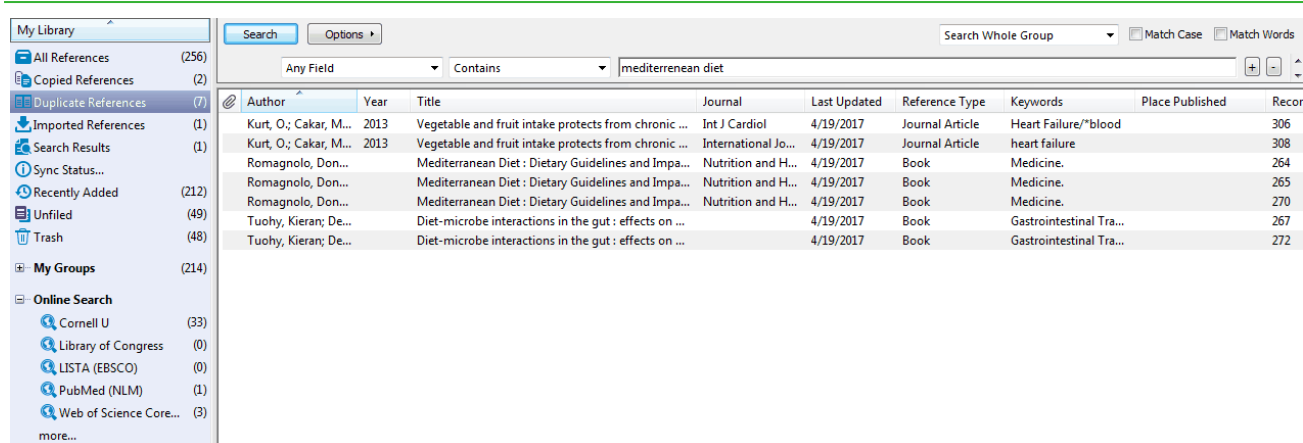


Figure 45. Library window showing the duplicate references

By default EndNote compares references based on the reference type and the author, year and title fields.

To change these criteria:

10. Select **Preferences...** from the **Edit** menu. A pop-up window appears with in the title bar 'EndNote Preferences'
11. Select **Duplicates** from the left menu. A box appears entitled 'Compare references based on the following fields:' (Figure 46)
12. Override some of the Endnote default settings, e.g. check Year-Title, or Author-Year-Volume.
13. Click on the **OK** button.
14. Repeat steps 1-5.

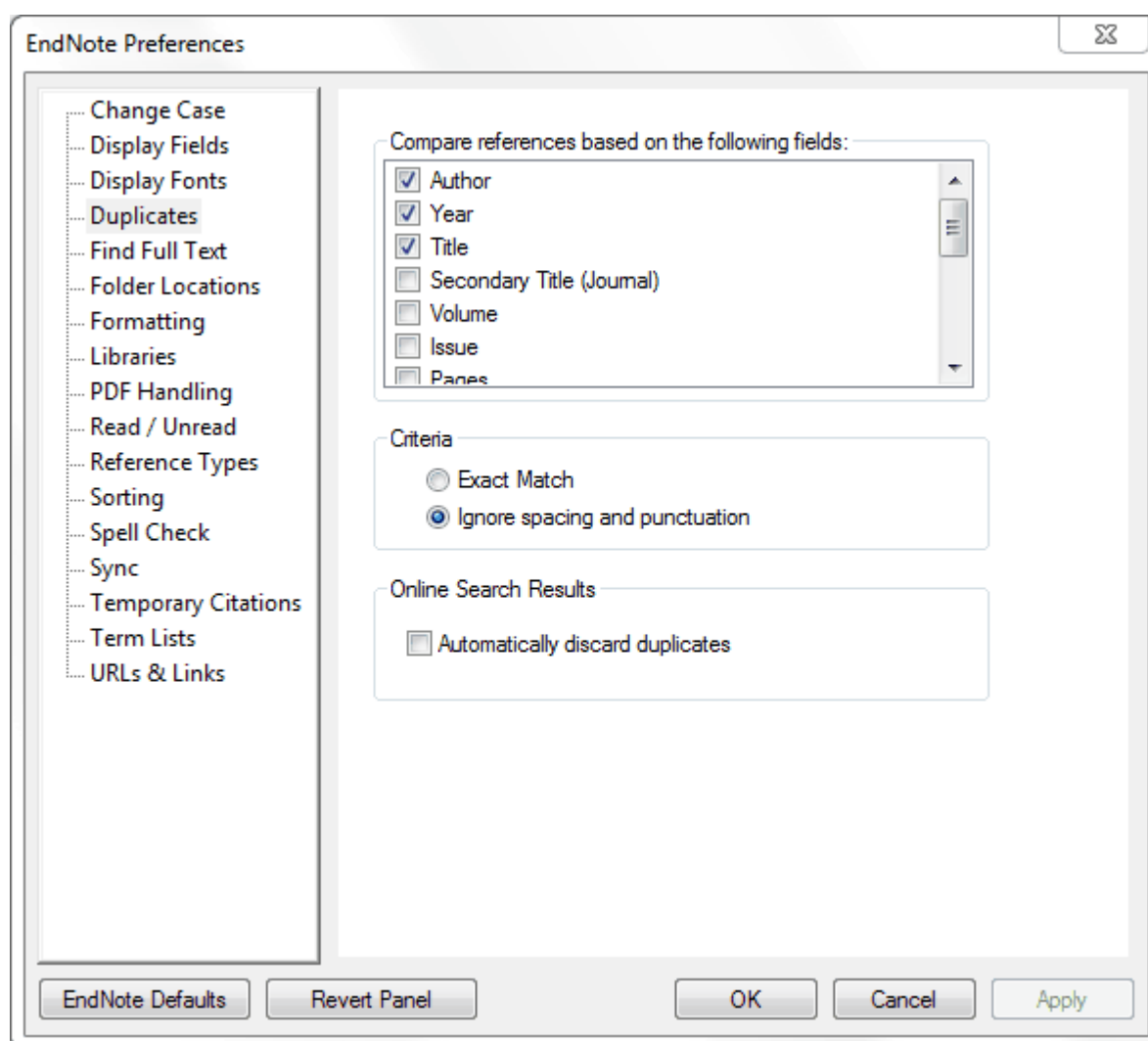


Figure 46. EndNote preferences window with Duplicates template

4.5 Print references

1. Make sure that the references you want to print are shown in the Library window.
2. To select the complete library: Select **Show All References** (Ctrl+M) from the **References** menu, or click on the All References group.
3. Go to **Edit** and choose **Select all** (Ctrl+A).
4. To make a selection: Select multiple references by holding down the CTRL key and clicking individual references.
5. Select an output style for the references, by choosing **Output Styles** from the **Edit** menu. A submenu appears with one or more output styles, e.g. Numbered.
6. If the required style is not listed in the submenu, select **Open Style Manager...** from the **Output Styles** submenu. The EndNote Styles window appears (Figure 47)
7. Select an Output Style (journal style) by checking the box to the left of the style. For users that do not have WUR Station, some extra styles not provided by EndNote can be downloaded from <http://www.wur.nl/en/Expertise-Services/Facilities/Library/Students/EndNote/EndNote-styles-for-WUR.htm>. Transfer these additional EndNote files into the folder M:\My Documents\EndNote\Styles. If the required style is missing ask your [information specialist](#) for assistance.
8. Close the EndNote Styles window by clicking on the X.
9. Select again **Output Styles** from the **Edit** menu. The selected style appears in the list of styles.
10. Select the Output Style you want to use.
11. Select **Print** from the **File** menu (Ctrl+P) to print the references according to the selected style. A window for the confirmation of the print command appears.
12. Click on the **OK** button.

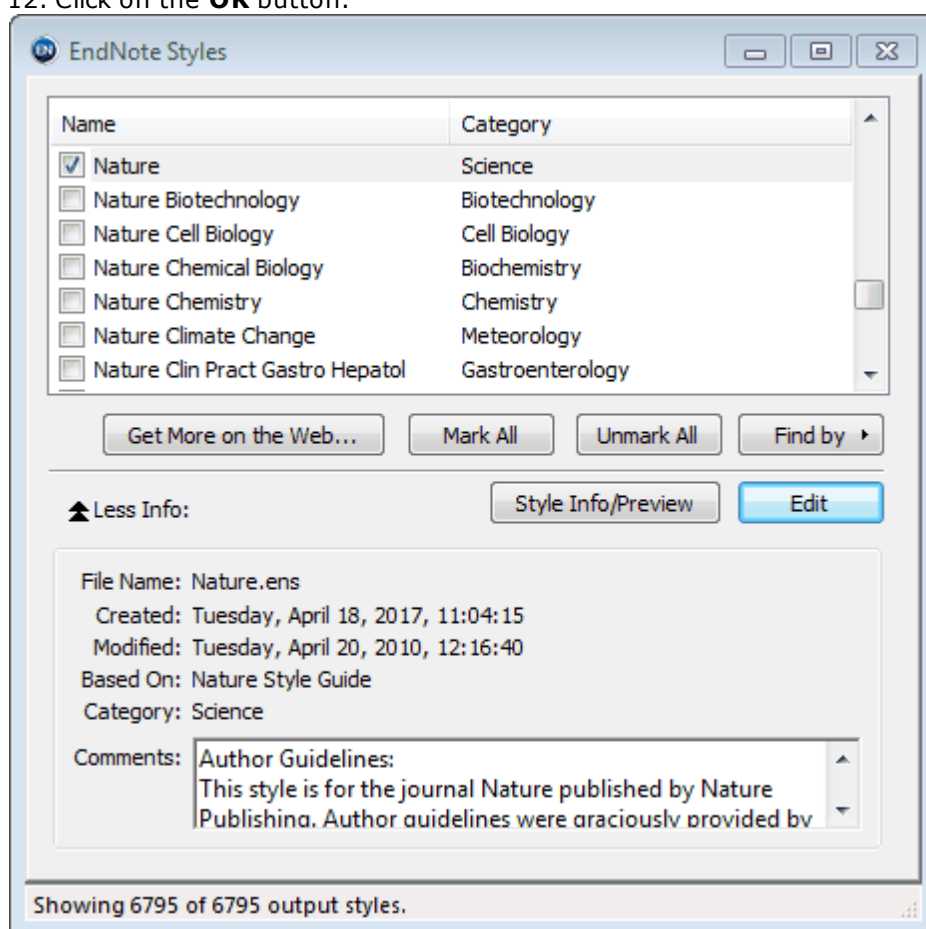


Figure 47. Select styles window

4.6 Share Library

You can share a complete EndNote library, including references, pdfs and annotations, with others to work together on projects. Everyone can add and annotate the library at the same time, and review changes made.

To share your library, you must first [set up a library](#)^[5] and [sync it with EndNote Online](#)^[45]. Then go to **File** and choose **Share....**

Enter e-mail addresses of colleagues you want to share with and click **Invite**. The invitees have to accept the invitation.

5 Manage PDFs

With EndNote you can easily manage your PDFs. You can link a PDF to a reference, EndNote will make a copy of the file and places this file in the [library name].DATA/PDF folder.

- [Create a link to PDF](#)^[38]

A new feature since Endnote X2 is the Find Full Text option. If you use this feature Endnote will search the internet for the full text of a given set of references, download the PDFs, store them in the [library name].DATA/PDF folder and link them automatically with the right references in your EndNote library.

- [Finding Full Text for a Reference](#)^[38]

Since Endnote X5 it is possible to view and annotate PDF files in the PDF & Quick Edit tab.

- [Making notes in a PDF](#)^[39]


EndNote does not only allow you to search in the description of the references, but also in the full text of the references, if a PDF is attached, and in the sticky notes attached to it (Figure 48).


- [Search in PDF and notes](#)^[40]

5.1 Create a link to PDF

When you want to create a link to a PDF or another type of file, you first need to download the PDF and store it in your own folders.

To link this file to a reference in your EndNote library:

1. Start EndNote. [Create a new library](#)^[5] or [open](#)^[6] an existing one.
2. Select the appropriate reference from the library window and double click on it (or choose **Edit references** from the **References** menu).
3. You are now in the window where you can edit a reference ([Figure 4](#)^[9]).
4. Go to the **References** menu and choose **File Attachments** and then **Attach File....** A dialogue screen appears asking you to choose a file.
5. Choose a file and click on **Open**. By default, the file will be copied to the [library name].DATA/PDF folder.
6. Scroll down to see the link to the attached file (Figure 48).
7. Click on the file to open it.
8. If you are finished editing the reference, close the reference by clicking on the  button, and decide whether you want to save the changes (**Yes**) or not (**No**).

 Nasto, M. K.; Osborne, B. B.; Lekb... 2017 Nutrient acquisition, soil phosphorus partitionin... New Phytol 4/19/2017 Journal Article
Figure 48. File linked with a relative path

By default, EndNote links the file with a relative path, i.e. makes a copy of your file and saves it in the [library name].DATA/PDF folder. If you want EndNote to link with an absolute path, i.e. to the folder where you stored your file, you need to change the EndNote preferences. If you made your EndNote library with an older version and if you attached PDFs using a absolute path, EndNote can easily convert these links to relative paths. See for detailed information on these topics in the help menu.

5.2 Find Full Text


EndNote can automatically locate and download full text files by accessing several sources, including at least these: DOI (Digital Object Identifier), PubMed LinkOut, and ISI Web of Knowledge Full Text Links. EndNote will try to use all of these methods to optimize the likelihood of finding full text files associated with your bibliographic records.

To find full text files, the references in your EndNote library need to have at least one of the following items:

- a DOI number in the DOI field
- a Web of Science record number in the Accession Number field
- a PubMed record number (PMID) in the Accession Number field

The downloaded files are stored in the folder [library name].DATA/PDF folder with a standard name consisting of 'author-year-part of the title', and linked automatically with the right references in your EndNote library.

To find full text:

1. Start EndNote. [Create a new library](#)^[5] or [open](#)^[6] an existing one.
2. Select one or more references from the library window (up to 1000)
3. Go to the **References** menu and choose **Find Full Text...** or Click on this  button.
4. In the Groups pane a temporary group **Searching...** appears under **Find Full Text** in which you can follow the searching process. In a second group **Found PDF** the references are shown of which the full text is downloaded. A third group is made for the references for which the PDF is **Not found** (Figure 49).

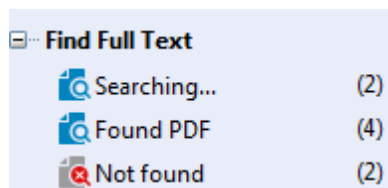


Figure 49. Find Full Text groups with references for which the PDF is found or not

Note! Do this for a reasonable amount of PDFs. Publishers tend to become nervous when an enormous amount of papers are downloaded in a short time and in reaction they may block access to their journals, not only for you but for everybody in the organisation.

5.3 Making notes in a PDF

To view a PDF in your EndNote library:

1. Start EndNote. [Create a new library](#)^[5] or [open](#)^[6] an existing one.
 2. Select the appropriate reference from the library window.
 3. Click on **PDF** in the right part of the library window (Figure 50).
- or:
2. Double click the appropriate reference from the library window.
 3. Click on the PDF view tab

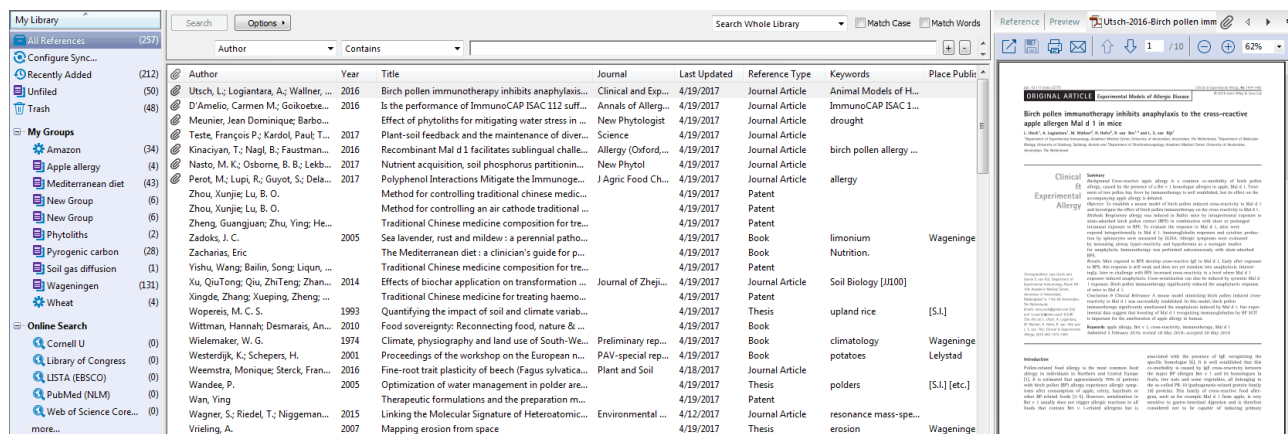





Figure 50. PDF tab in the library window

1. On top of the PDF a toolbar appears with the PDF Viewer panel that displays different options.
2. To highlight text, click on the **Highlight Text**  button and move the mouse over pieces of text.
3. Click on **Save PDF**  to store the changes.
4. To annotate text, click on the **Sticky Note**  button and move the mouse to the point where you want to annotate the PDF.
5. Click on the left mouse button and a Sticky Note will appear.
6. Double-click on the sticky note to obtain a text box in which you can write a comment or note.
7. Click on the cross (x) to save the comment and to hide it.

8. Click on **Save PDF**  to store the changes.

5.4 Search in PDF and notes

1. Open a library
2. Open the **Search** panel at the top of the library window.
3. Enter search terms in the Search boxes and change the search field into **Any Field + PDF with Notes** (Figure 51).



The screenshot shows the EndNote search interface. At the top, there is a 'Search' button and an 'Options' dropdown. To the right, there is a 'Search Whole Library' dropdown and two checkboxes: 'Match Case' and 'Match Words'. Below this, there are three search criteria rows. The first row is selected and shows 'Any Field + PDF with Note' in the field dropdown, 'Contains' in the operator dropdown, and an empty text input box. The second row shows 'And' in the connector dropdown, 'Year' in the field dropdown, 'Contains' in the operator dropdown, and an empty text input box. The third row shows 'And' in the connector dropdown, 'Title' in the field dropdown, 'Contains' in the operator dropdown, and an empty text input box. Each text input box has '+' and '-' buttons on its right side.

Figure 51. Search in any field + PDF with notes

6 Integration with MS Word

In addition to being a reference database, EndNote is a reference list maker. EndNote is integrated with your word processor to include in-text citations and to create a reference list formatted according to the instructions for authors of thousands of scientific journals. This part discusses integration with MS Word 2016, but integration with other word processors is equally possible (see help file). It is assumed that the EndNote add-in tools are already integrated with MS Word during installation of EndNote.

A simplified EndNote tab is also available in MS PowerPoint, allowing you to insert citations and references into your presentation. See the EndNote help file in the EndNote programme for more information on EndNote integration in PowerPoint.

- [Include references in a document](#)^[41].
- [Format reference lists according to another journal style](#)^[41].
- [Edit citation](#)^[42]

6.1 Include references in a document

On successful installation of EndNote on your computer, MS Word shows an EndNote X8 tab (Figure 52). If the EndNote tab is not visible in Word, consult the [WUR Library's page on EndNote](http://www.wur.nl/en/Expertise-Services/Facilities/Library/Students/EndNote.htm) (<http://www.wur.nl/en/Expertise-Services/Facilities/Library/Students/EndNote.htm>).

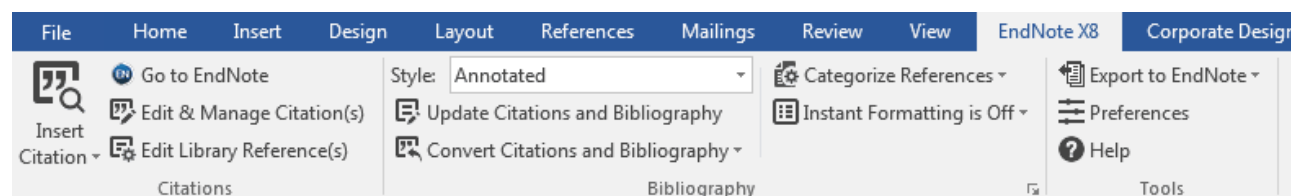



Figure 52. EndNote tab in MS Word

Basic steps to cite a reference:

1. Start MS Word and open your document
2. Put the cursor in the text where you would like to insert a citation
3. Choose the **Endnote X8** tab and open EndNote by clicking on the command  **Go to EndNote**
4. Open a library and select the reference or references you want to cite
5. Go back to Word and choose **Insert Citation**, and then **Insert Selected Citation(s)** from the EndNote commands. EndNote inserts the selected citation as a temporary citation, which looks like {Smith, 2009, #34} or after inserting multiple citations at the same time (Smith, 2009, #34; Jones, 2004, #12; Doe, 2007, #67}
6. Click the **Save** button (Ctrl+S) in the **File** menu to save changes to your Word document.

Quick steps to cite a reference:

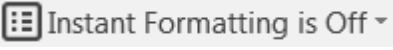
1. Start MS Word and open your document
2. Put the cursor in the text where you would like to insert a citation
3. Click on **Insert Citation**, and then on **Insert citation...**
4. Find the citation by typing the author name or a keyword, click **Find**, select the appropriate reference, click **Insert**.

6.2 Format reference lists according to another journal style

When you have finished inserting citations, you want to create a reference list and change the temporary citations into the correct format. Proceed like this:

1. Choose the EndNote X8 tab in Word.
2. Select a [style](#)^[41] using the drop-down menu. You might select one of the styles in the shortlist or another style by choosing **Select another style...**
3. Click **Update Citations and Bibliography** and EndNote scans the paper for the temporary citations, replaces them by the formatted citation for the style selected, and appends a reference list or bibliography at the end of the document.
4. If you choose another style, the format of the formatted references is adapted instantly.
5. If you want to return to the temporary citations, click **Convert Citations and Bibliography**, and then **Convert to Unformatted Citations**

If you prefer to have the citations formatted as soon as you enter them in the Word document:

Turn instant formatting on in the EndNote X8 tab in Word: 

Or:

1. Go to **Preferences** in the EndNote X8 tab in Word
2. Mark **Enable Instant Formatting** on new Word documents (Figure 53) and click **OK**

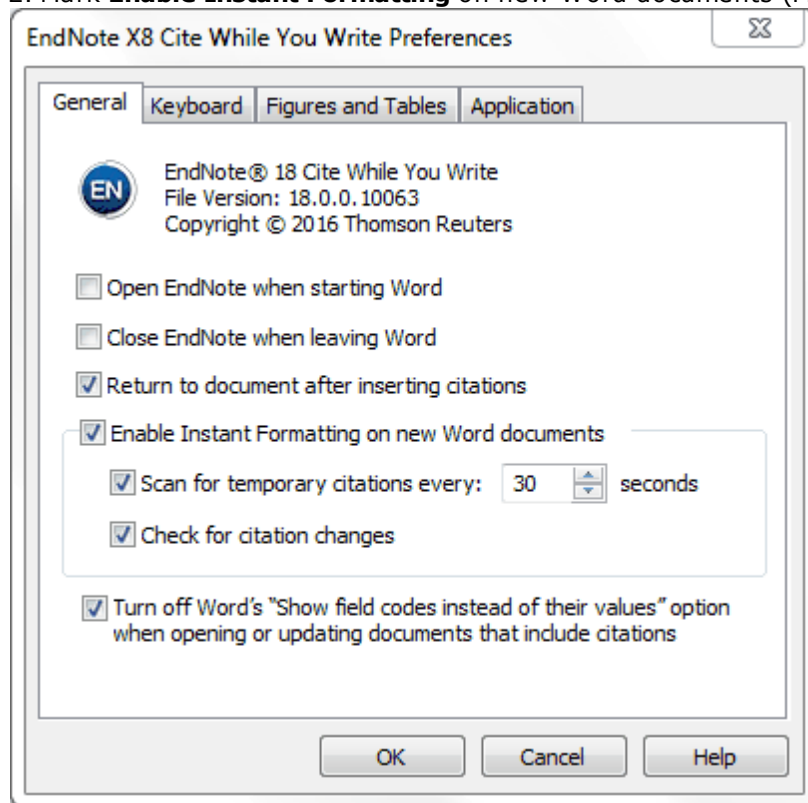


Figure 53. EndNote X8 Cite While You Write preferences

6.3 Edit citation

Sometimes you may want to add text to a formatted citation, such as a page number where to find specific information, or you want to remove the author's name to avoid repetition. It is possible to make changes directly in the formatted citations, but as soon as you update or convert the citations the changes are lost.

A solution is to edit the unformatted or temporary citation. A temporary citation in a Word document looks like, e.g. {de Boef, 2012, #345}, which represents the first author, the publication year and a unique record number given by EndNote, surrounded by delimiters. On formatting this with an author-date style, this will turn into (de Boef, 2012). Removing the author from the temporary citation, such as {, 2012, #345}, changes the formatted citation into (2012). It is also possible to add text, e.g. page numbers as in {de Boef, 2012, #345, p.790}. The formatted citation now changes into (de Boef, 2012, p.790) or (1, p.790) in case of a numbered style.

Another solution is to use the Edit citation(s) option to safely edit a formatted citation:

1. Start MS Word and open the document
2. Choose the EndNote X8 tab and choose **Update Citations & Bibliography** if the citations are not formatted
3. Click on the citation you want to change
4. Choose **Edit & Manage citations**. A window appears where you can view, select, edit and remove citations from the current Word document (Figure 54).

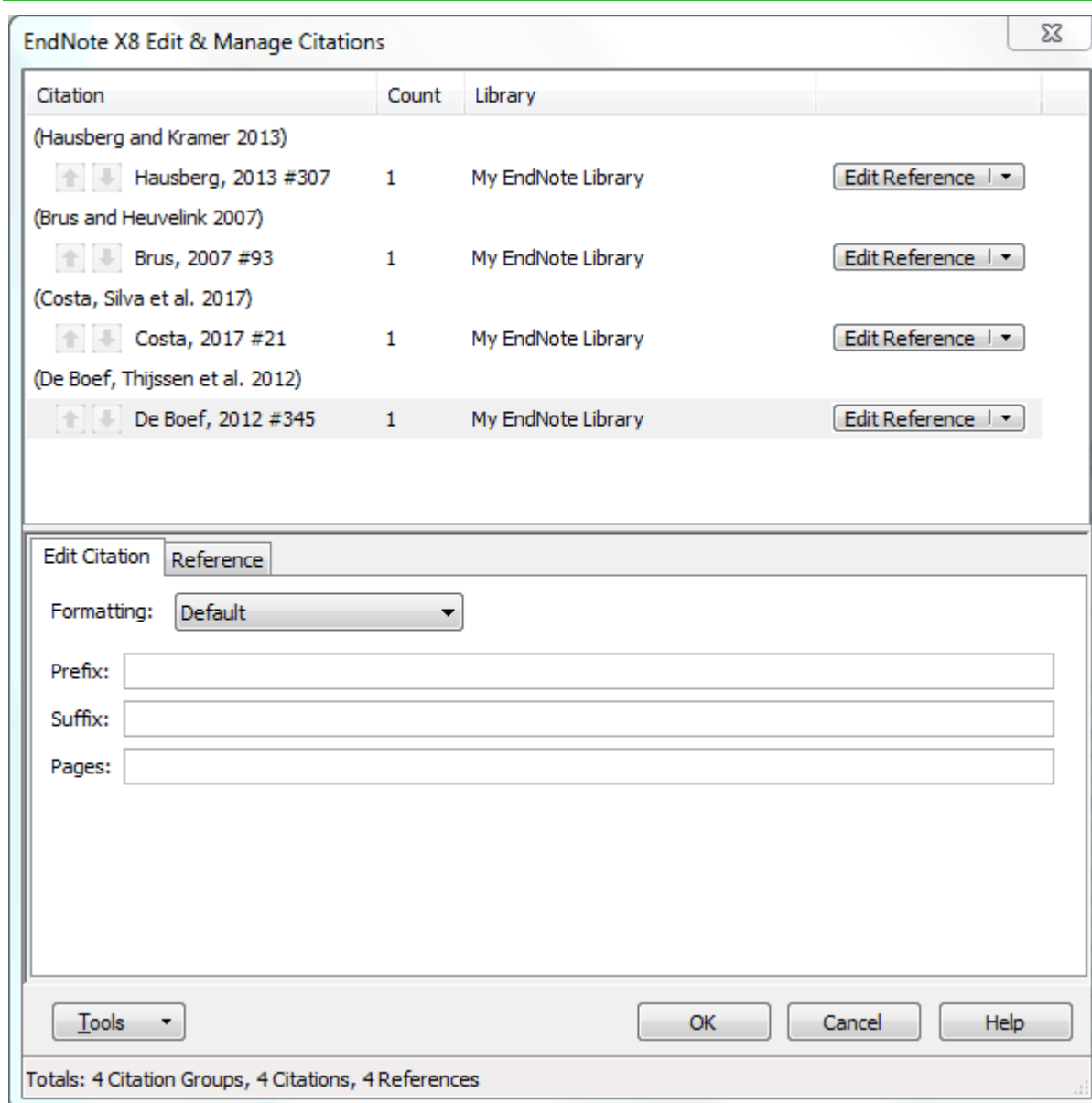


Figure 54. Edit citation window in Word

5. The selected citation is highlighted in the citation list in the upper part of the window. Select another citation if necessary.
6. Click on the little arrow behind **Formatting: Default**
7. Choose **Display as: Author (Year)** or **Exclude author** if you want to omit the author name from the citation
8. Choose **Exclude year** if you want to omit the publication year from the citation
9. Type text in the **Prefix** box, if you want to add text before the citation, e.g. (see de Boef, 2012). Do not forget to add spaces.
10. Type text in the **Suffix** box, if you want to add text after the citation, e.g. (de Boef, 1988, p.790). Do not forget to add spaces.
11. Use **Pages**, if you want to add page numbers. Page numbers only appear if the Cited Pages field is added in the citations template of the output style.
12. Click **OK** after you made the changes.

7 EndNote Online

EndNote Basic (formerly known as EndNote Web and also known as EndNote Online) is a web-based version of the EndNote citation management program. This EndNote version is available for everyone although you have more options when you register while you are on the WUR network. With EndNote Online you can view and edit your references from every computer with an internet connection. It is also possible to share (parts of) EndNote Online libraries with other EndNote Online users. EndNote Online is thus convenient for group work.

7.1 Registration

To create libraries, manage and cite references with EndNote Online you have to register for an account with Clarivate analytics Web of Science.

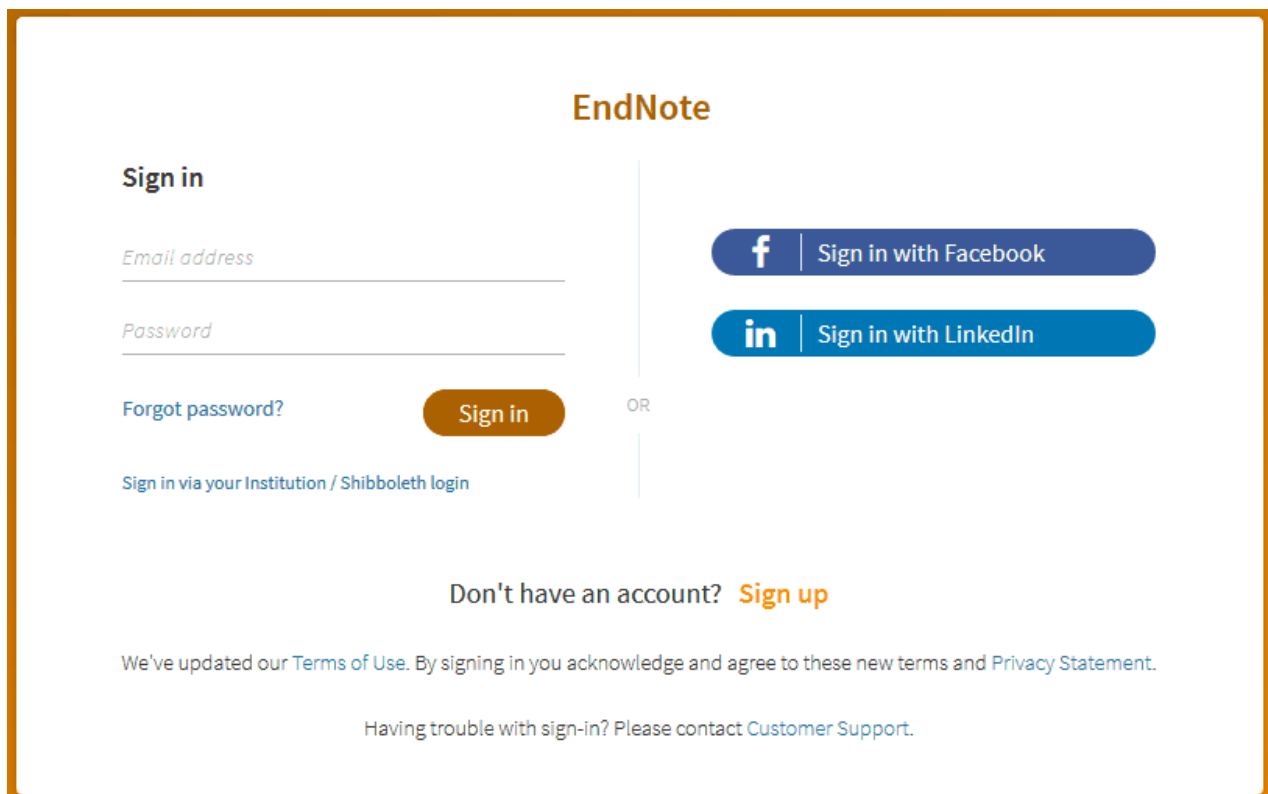
To register for EndNote Online:

1. Start your browser and go to the [WUR Library](http://www.wur.nl/en/expertise-services/Facilities/library.htm) (<http://www.wur.nl/en/expertise-services/Facilities/library.htm>).
2. Scroll down to the list of Frequently used databases at the bottom of the page in the grey footer.
3. Select **Web of Science**.
4. In Web of Science, click the **EndNote™** tab in the top menu (Figure 55).



Figure 55. EndNote Online tab in Web of Science

5. Register or sign in (Figure 56).



The image shows the EndNote Online sign-in and registration interface. At the top, the 'EndNote' logo is centered. Below it, the 'Sign in' section is on the left, featuring input fields for 'Email address' and 'Password', a 'Forgot password?' link, and a 'Sign in' button. To the right of the 'Sign in' section is a vertical line with 'OR' in the middle. To the right of the line are two social media login buttons: 'Sign in with Facebook' and 'Sign in with LinkedIn'. Below the 'Sign in' section is a link for 'Sign in via your Institution / Shibboleth login'. At the bottom, there is a 'Don't have an account? Sign up' link, a notice about updated Terms of Use and Privacy Statement, and a link to Customer Support.

Figure 56. Registration for EndNote Online at Web of Science

7.2 Synchronization with locally saved Endnote library

EndNote allows you to synchronize your entire desktop library with EndNote online. The Sync process synchronizes the desktop and online library so that your library in EndNote desktop and EndNote online are an exact match. In order to synchronize references you have to provide EndNote with the login settings of your EndNote Online account. You have to do this in EndNote desktop.

1. In the EndNote desktop menu, go to **Edit** and there to **Preferences....**
2. Go to **Sync** (Figure 57)
3. Provide your EndNote Online credentials (E-mail and password).
4. If you check the box **Sync Automatically** your EndNote desktop and EndNote Online will automatically be synced every 15 minutes.
5. Click **OK** (Figure 57).

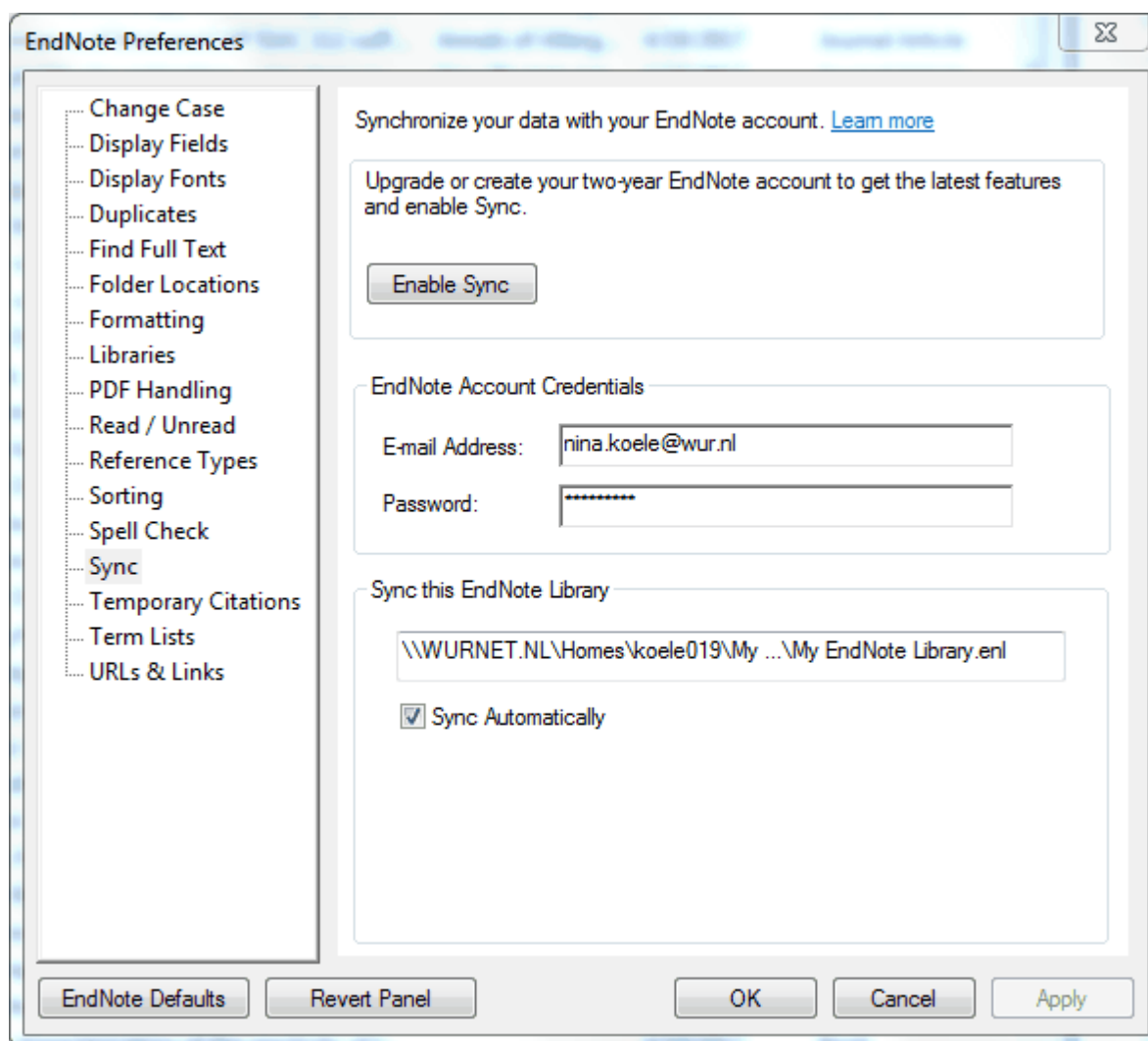



Figure 57. EndNote preferences to sync with EndNote Online

You can manually sync EndNote desktop and EndNote Online either via the sync button , or via **Tools** and then **Sync** in EndNote desktop.

7.3 My references

Under the tab **My References** all references in the EndNote Online library are listed (Figure 58).

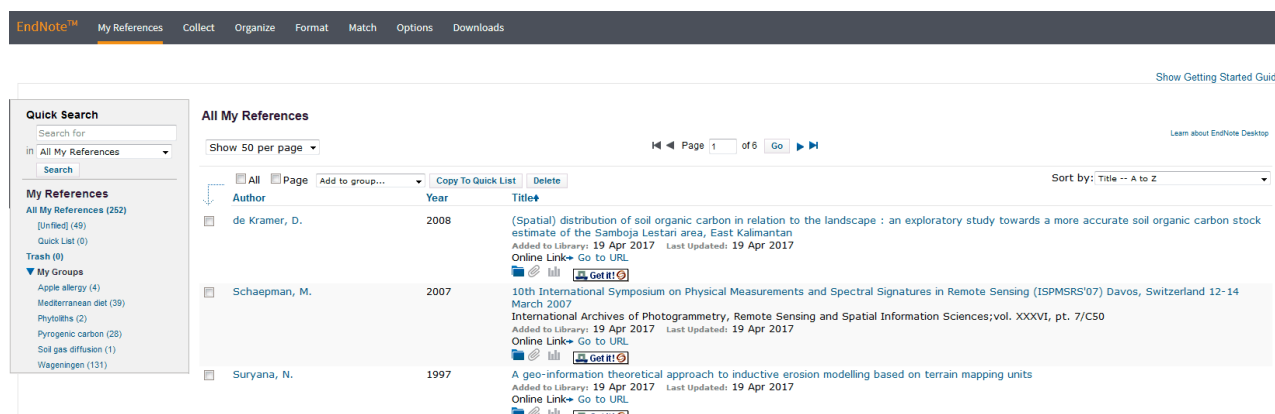







Figure 58. My References tab in EndNote Online

Under **All My References** all references from the EndNote Online library are listed. By default, references are sorted by Author in ascending order. Each record is also accompanied by icons

representing:

- group membership: 
- file attachments: 
- figure attachments: 
- a link to the SFX-menu for access to the publication (if available via the library): 
- If an article is available via Open Access this is shown via the full Text icon: 

Figures or files can be attached to a reference in the EndNote Online library by clicking on the icons for file or figure attachments. In the screen that opens you have to select the file or figure that needs to be attached by clicking on **Attach files** (Figure 59).



Figure 59. Adding a file attachment to a reference in EndNote Online

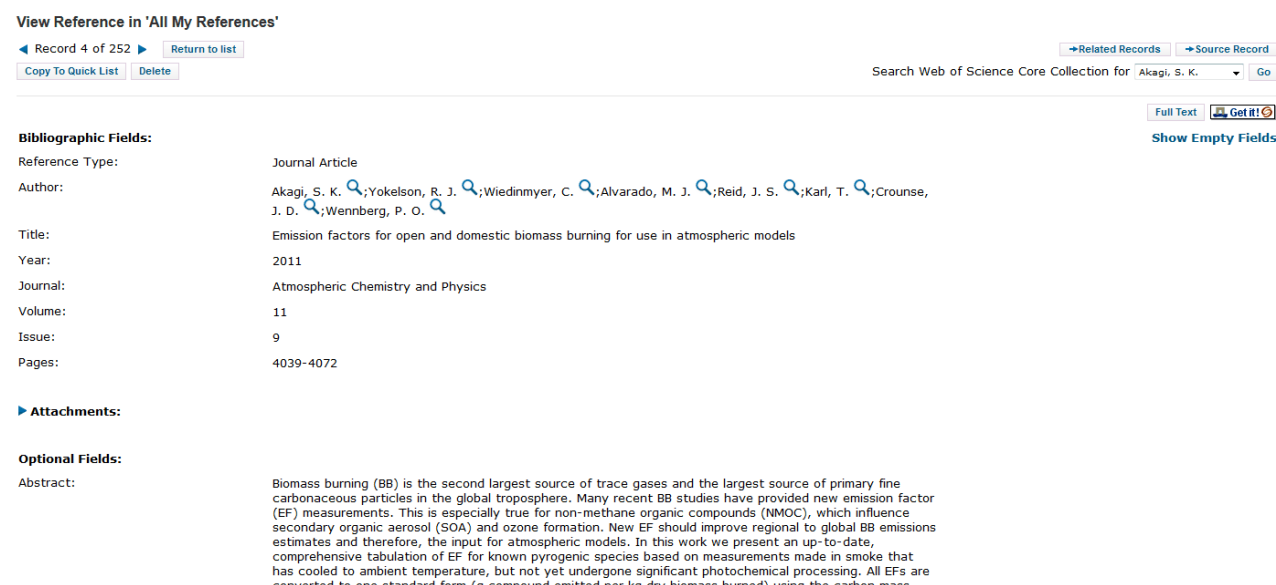
Click on **Attach files** and browse to the file you want to upload, click **upload** and the file(s) will be attached to the item in EndNote.

The number of references presented per page in EndNote Online is set by default to 10. In the drop-down menu **Show 10 per page** (at the top of the page) this number can also be set to 25 or 50.

References can be selected by checking the boxes in front of individual references. Select all references on a page, or all references in the EndNote Online library by checking one of the boxes on top of the Author column. The selected references will be added to the group you selected in the list of groups in the drop down menu under **Add to group....** New groups can be created from the drop-down menu by choosing the option **New group**.

You can delete selected references by clicking the button **Delete**. The deleted references are first moved to Trash, which can be emptied. Selected references can be copied to the Quick List by clicking on the button **Copy to Quick List**. References copied to the Quick List remain there during your active session in EndNote Online. Once you log out of your library or your session expires, the quick list is cleared.

Click on the title of a reference to open and view it in the EndNote Online library (Figure 60).



View Reference in 'All My References'

◀ Record 4 of 252 ▶ [Return to list](#)

[Copy To Quick List](#) [Delete](#)

[Related Records](#) [Source Record](#)

Search Web of Science Core Collection for Akagi, S. K. [Go](#)

[Full Text](#) [Get it!](#)

[Show Empty Fields](#)

Bibliographic Fields:

Reference Type: Journal Article

Author: Akagi, S. K.; Yokelson, R. J.; Wiedinmyer, C.; Alvarado, M. J.; Reid, J. S.; Karl, T.; Crounse, J. D.; Wennberg, P. O.

Title: Emission factors for open and domestic biomass burning for use in atmospheric models

Year: 2011

Journal: Atmospheric Chemistry and Physics

Volume: 11

Issue: 9

Pages: 4039-4072

Attachments:

Optional Fields:

Abstract: Biomass burning (BB) is the second largest source of trace gases and the largest source of primary fine carbonaceous particles in the global troposphere. Many recent BB studies have provided new emission factor (EF) measurements. This is especially true for non-methane organic compounds (NMOC), which influence secondary organic aerosol (SOA) and ozone formation. New EF should improve regional to global BB emissions estimates and therefore, the input for atmospheric models. In this work we present an up-to-date, comprehensive tabulation of EF for known pyrogenic species based on measurements made in smoke that has cooled to ambient temperature, but not yet undergone significant photochemical processing. All EFs are converted to one standard form (a compound emitted per kg dry biomass burned) using the carbon mass

Figure 60. Opened reference in an EndNote Online library

Click on the contents of a field to edit a field manually. To save the change, click or tap outside that field.

At the top of a reference the buttons **Copy to Quick List** and **Delete** enable you to copy the reference to the Quick List or move it to Trash. Other buttons in the screen enable you to obtain the full text of the article (button **Full Text**), show the SFX menu (button **Get it!**) or go to the article at the publisher's website (button **Go to URL**). You can show or hide **Empty Fields** in the reference by clicking on the corresponding link. By clicking on the button **Return to List** you save the modifications of the reference and you return to the list with all references.

Use the **Quick Search** on the View Reference display (Figure 61) to search in your references (e.g. author names, keywords or words in the title). Under **My References** you can select your complete EndNote Online library (**All My References**) or one of the groups. **Groups Shared by Others** show links to references in libraries owned by other users. Read Only access or Read & Write access is permitted by these other users. You can hide the **Quick Search** panel by clicking on the **Hide Panel** tab on the left.

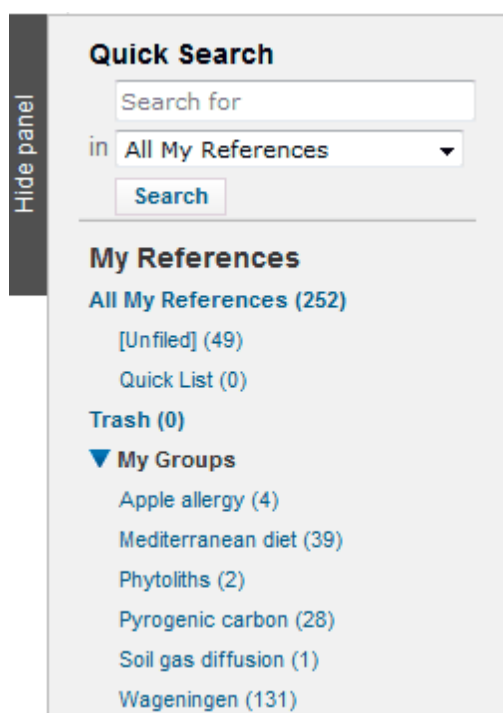


Figure 61. Quick Search panel

7.4 Collect references

You can collect references and add them to your EndNote Online library in different ways, available under the tab **Collect**:

- [Online Search](#)^[48]: To perform searches directly via a connection between Endnote Online and an online database or catalogue
- [New Reference](#)^[50]: To manually add references to your EndNote Online library
- [Import References](#)^[50]: To import references into your library from an EndNote library or from a file by using a filter

In [Web of Science](#)^[12] you can also choose to export search results to EndNote Online, the same as for EndNote desktop.

7.4.1 Online search

To perform an online search in EndNote Online:

1. Click on the tab Collect
2. Select a database or library catalogue connection from the list under the drop-down menu (Select...)

3. Click Connect (Figure 62).

The list with connections can be changed via the link Select Favorites.

Figure 62. Selection of Web of Science to perform an online search for references

4. You will be directed to the second step to specify your search (Figure 63).

Figure 63. Online search screen after connecting to Web of Science Core Collection

5. Click the **Search** button to start the online search. The next screen (Figure 64) shows the search results. Check the references you want to add to your EndNote Online library.

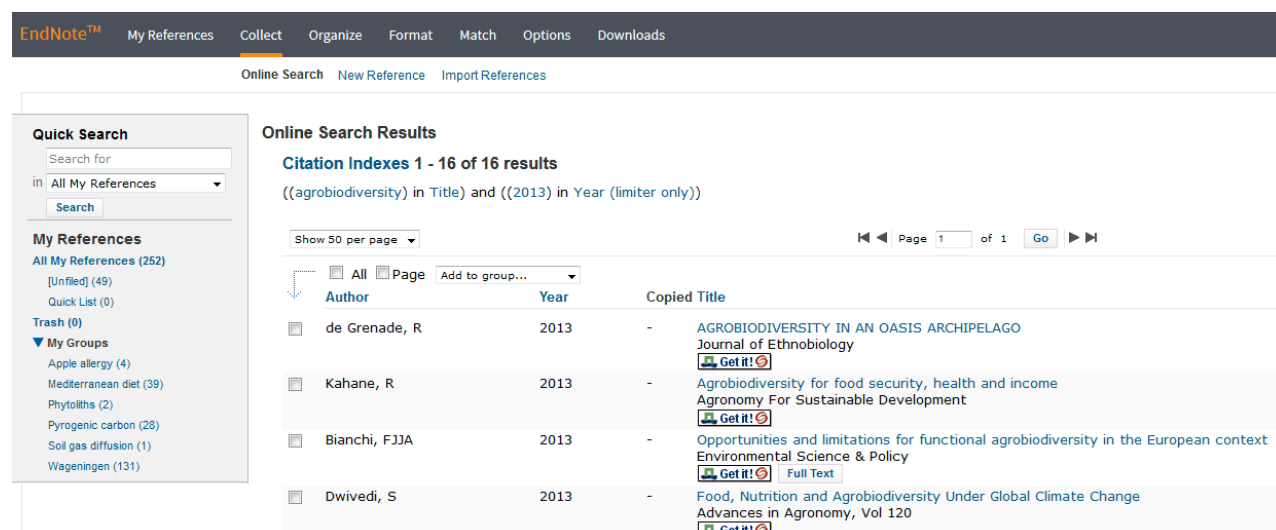


Figure 64. Results for search on agrobiodiversity in 2013 in Web of Science Core Collection

In the drop-down menu **Add to group...** you can choose a (new) group to add selected references to. Alternatively, references can also be added to an unfiled list.

7.4.2 New reference

Select the **New Reference** option under the tab **Collect** to add references manually. Choose the appropriate **Reference Type** from the drop-down menu for the reference that you want to enter in your EndNote Online library (Figure 65).

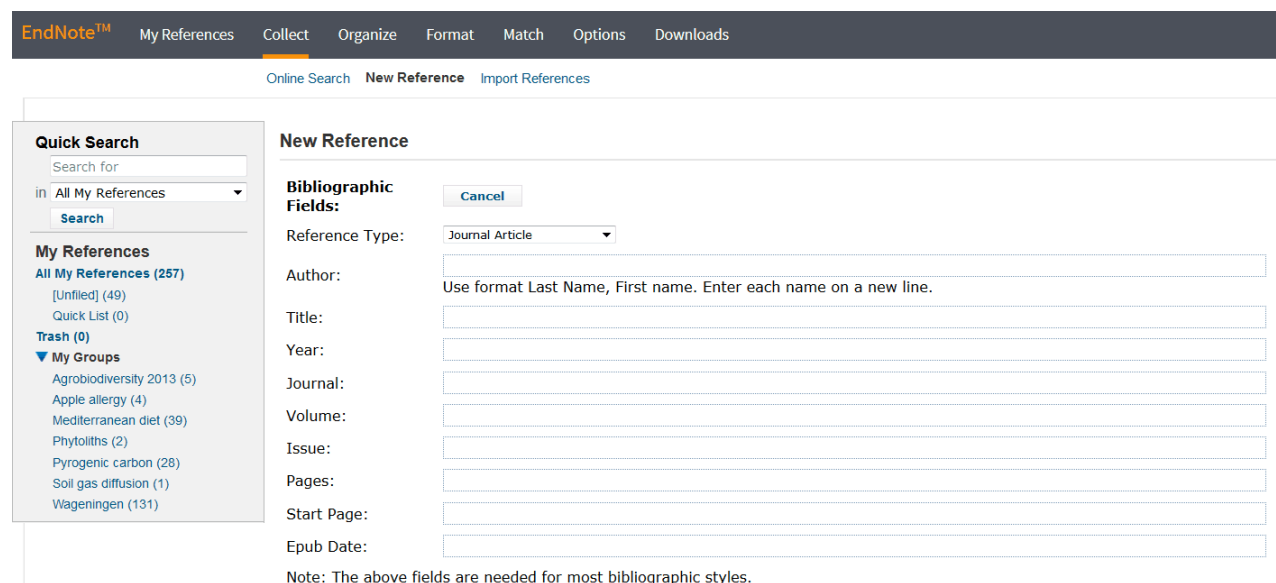


Figure 65. Manually adding a reference to EndNote Online

7.4.3 Import references

Select **Import References** under the **Collect** tab to import references into EndNote Online via a filter (Figure 66). You can import references from an EndNote library (desktop version) or import references from a search in a bibliographic database. See [Add references to a library](#)⁸¹ for more information about saving references from a bibliographic database.

Before references can be imported into EndNote Online you have to specify the settings (Figure 66):

1. Browse to the file with references to import into EndNote Online in the box next to **File**:
2. Select the appropriate filter to import the file via the drop-down menu next to **Import Option**:
3. Via the drop-down menu next to **To:** select a group or an unfiled list to import the references to.
4. Click the **Import** button to import the references from the file into the EndNote Online library

Figure 66. Selection of File, Import Option and Group to import references

If you want to import references from a locally saved EndNote library you have to export the references from the local EndNote library as **EndNote Export**. Choose **EndNote import** filter to import these references into EndNote Online.

7.5 Organize libraries

With EndNote Online you can organize your online stored references. You can create (and manage) groups, share groups with other EndNote Online users, deduplicate references in your EndNote Online library, and manage files or figures attached to references.

Under the **Organize** tab there are four different tabs available to organize your EndNote Online library:

- [Manage My Groups](#)^[52]
- [Others' Groups](#)^[53]
- [Find Duplicates](#)^[53]
- [Manage Attachments](#)^[53]

7.5.1 Manage my groups

Select **Manage My Groups** under the **Organize** tab to manage and create groups (Figure 67). Click on the button **New Group** to create a new group.

Manage My Groups


My Groups↑	Number of References	Share		
 Agrobiodiversity 2013	5	<input checked="" type="checkbox"/>	Manage Sharing	Rename Delete
Apple allergy	4	<input type="checkbox"/>	Manage Sharing	Rename Delete
Mediterranean diet	39	<input type="checkbox"/>	Manage Sharing	Rename Delete
Phytoliths	2	<input type="checkbox"/>	Manage Sharing	Rename Delete
Pyrogenic carbon	28	<input type="checkbox"/>	Manage Sharing	Rename Delete
Soil gas diffusion	1	<input type="checkbox"/>	Manage Sharing	Rename Delete
Wageningen	131	<input type="checkbox"/>	Manage Sharing	Rename Delete
New group				

Figure 67. Manage My Groups in EndNote Online

You can share, rename or delete your groups.

1. Activate sharing a group by checking the box under **Share** (Figure 67).
2. Click on the button **Manage Sharing** and subsequently on **Start sharing this group**.
3. Enter user's e-mail addresses to share groups.
4. Click the **Apply** button.
5. In the **Add E-mail Addresses** window you can select the Read only or Read & Write access option (Figure 68).
6. Use the buttons **Edit** and **Delete** to modify or share e-mail settings or to delete users from the list.
7. Click the **Add More** to add users.
8. Use the button **Delete All** to remove the complete list with shared users (Figure 68).

Manage Sharing for 'Agrobiodiversity 2013'

1 E-mail Address

E-mail Address ↑	Read only	Read & Write		
marianne.renkema@wur.nl	<input checked="" type="radio"/>	<input type="radio"/>	Edit	Delete
Add More				

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

Delete All

Figure 68. Manage sharing for a group in EndNote Online

On the **Manage My Groups** page the icon next to the group name indicates that the group is shared with other users (Figure 67). The same icon is shown next to the group in the search panel under the tab **My References**.

7.5.2 Others' groups

Access to others' groups is possible via the link **Others' Groups** under the tab **Organize** (Figure 69). After clicking on this link a table is shown with EndNote Online library groups from other users who have given you access.

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"/>	Manual	3	marianne.renkema@wur.nl

Figure 69. Access to (shared) EndNote Online library groups from other users

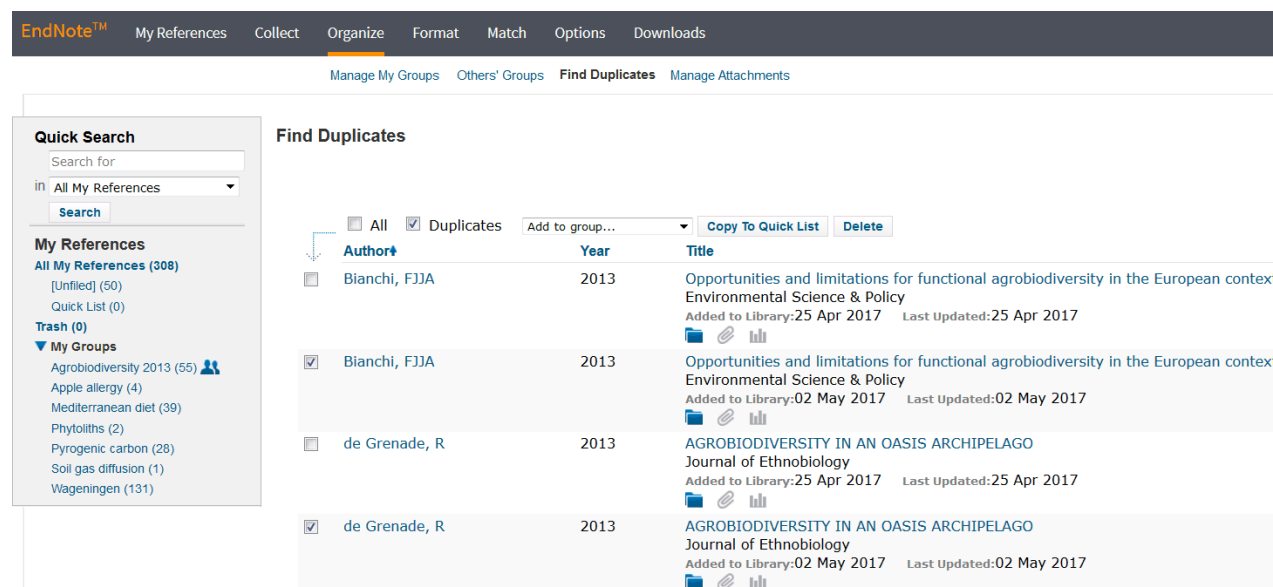
Read & write access to Others' Groups is indicated by an icon under **Access**. For read only access no icon is shown. The same icon is shown next to the shared group in the search panel under the **My References** tab.

Check the boxes under **Show** to see shared libraries under **Groups Shared by Others** under the tab **My References**. Check the boxes under **Use for Cite While You Write** for groups you would like to be available for Cite While You Write.

7.5.3 Find duplicates

You can search for duplicate references in your EndNote Online library. Click on the link **Find Duplicates** under the tab **Organize**. To find duplicates EndNote Online compares references based on Author, Year, Title and Reference Type.

After the search the duplicate references are displayed. You can check duplicate references and move them to trash by clicking on the **Delete** button (Figure 70).



Find Duplicates

☐ All ☒ Duplicates

	Author	Year	Title
<input type="checkbox"/>	Bianchi, FJJA	2013	Opportunities and limitations for functional agrobiodiversity in the European context Environmental Science & Policy Added to Library: 25 Apr 2017 Last Updated: 25 Apr 2017
<input checked="" type="checkbox"/>	Bianchi, FJJA	2013	Opportunities and limitations for functional agrobiodiversity in the European context Environmental Science & Policy Added to Library: 02 May 2017 Last Updated: 02 May 2017
<input type="checkbox"/>	de Grenade, R	2013	AGROBIODIVERSITY IN AN OASIS ARCHIPELAGO Journal of Ethnobiology Added to Library: 25 Apr 2017 Last Updated: 25 Apr 2017
<input checked="" type="checkbox"/>	de Grenade, R	2013	AGROBIODIVERSITY IN AN OASIS ARCHIPELAGO Journal of Ethnobiology Added to Library: 02 May 2017 Last Updated: 02 May 2017

Figure 70. Find duplicates in EndNote Online

7.5.4 Manage attachments

Select **Manage Attachments** on the **Organize** tab to manage files and figures attached to references in the EndNote Online library (Figure 71). A list is shown of attached files and figures that can be **sorted by** file size, attachment name, author, year, title, attachment type, source title or date of adding or updating. The used storage space of attachments is also presented. Endnote Online provides unlimited storage of file and figure attachments.

Click on the **Attachment Name** to open an attached file or a figure. Click on an **Author** name to search for references from this author included in the EndNote Online library. Open the reference of

the attachment by clicking on its **Title**.

To delete a file or figure attachment from Endnote Online, check the box next to the attachment and click on the button **Delete Attachments**.

Manage Attachments

Used Space: **549.79 KB** Available Space: **Unlimited**

Show 50 per page ▾

◀◀ Page 1 of 1 Go ▶▶

Sort by: File Size -- largest to smallest ▾

☐ All ☐ Page

Delete Attachments

File Size	Attachment Name	Author	Year	Title
<input type="checkbox"/> 549.79 KB	 Nasto_et_al-2017-New_Phytol...	Nasto, M. K.	2017	Nutrient acquisition, soil phosphorus partitioning and competition among trees in a lowland tropical rain forest New Phytol Added to Library: 12 Apr 2017 Last Updated: 16 May 2017

Show 50 per page ▾

◀◀ Page 1 of 1 Go ▶▶

Figure 71: Manage attachments in EndNote Online

7.6 Format

Under the **Format** tab you can choose features provided by EndNote Online to create reference lists (or bibliographies) and to export reference lists according to a selected style. Use the same tab to cite references via the Cite While You Write Plug-In in MS Word documents and to format these according to a particular (journal) style.

Under **Format** four different tabs are available to format your references in a specific citation style:

- [Bibliography](#)^[54]
- [Cite While You Write Plug-In](#)^[55]
- [Format Paper](#)^[56]
- [Export References](#)^[57]

7.6.1 Bibliography

Create a reference list (bibliography) according to a selected style via **Bibliography** under the **Format** tab (Figure 72).

Bibliography

References: - Agrobiodiversity 2013* ▾

Bibliographic style: Agroforestry Systems ▾ [Select Favorites](#)

File format: TXT (plain text file) ▾

Save **E-Mail** **Preview & Print**

Figure 72. Create a bibliography with EndNote Web

1. Put the references you need for your list in a group or copy them to the Quick List and select them in the drop-down menu next to **References:**.
2. Select a style from the drop-down menu next to **Bibliographic style:** (Figure 72). You can change the list with styles via the link [Select Favorites](#).
3. Choose between html output or a plain/rich text file in the drop-down menu next to **File format:**.
4. Click the buttons **Save**, **E-Mail** or **Preview & Print** to save, to e-mail or to print your bibliography.

7.6.2 Cite while you write plug-in

If you have EndNote desktop installed on your computer, the MS Word plug-in will automatically be installed, and you won't need to install the EndNote Online MS Word plug-in for in-text citations and bibliographies. If you have the EndNote X8 desktop version installed, refer to the chapter [Integration with MS Word](#).^[41]

If EndNote X8 desktop version is not installed on your computer, and you are using EndNote Online, install the EndNote Online MS Word plug-in to cite references and create a bibliography in Word: In EndNote Online, select **Cite While You Write Plug-In** under the **Format** tab to find links to download and install Windows or Macintosh versions of the Cite While You Write Plug-In (Figure 73). Use this EndNote Online plug-in to insert and format citations in MS Word documents. At the end of your document you can create a reference list based upon the used in-text citations.

The plug-in also allows you to save references online in an EndNote Online library. You can save references via a **Capture** button in the EndNote Online toolbar in your web browser. For more information see [Downloads](#).^[59]

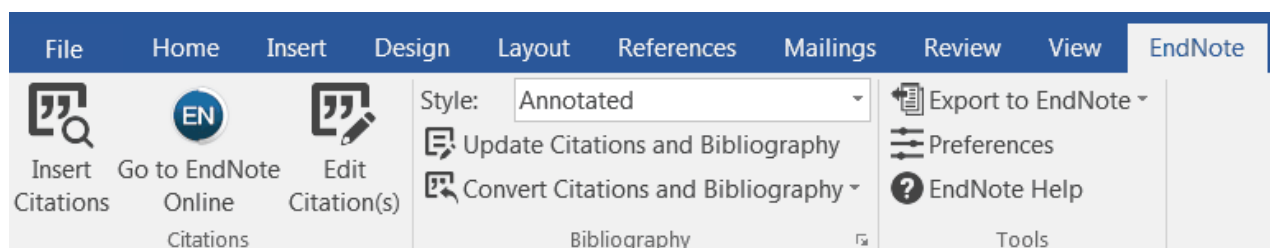


Figure 73. EndNote Online Cite While You Write Plug-In for MS Word

The Cite While You Write plug-in in MS Word provides eight options (Figure 73):

1. Insert citations: find references in your EndNote Online library based on keywords, author names, year, etc., and insert them as citation in an MS Word document
2. Go to EndNote Online: go from the MS Word document to your EndNote Online library.
3. Edit Citations: edit citations included in the MS Word document.
4. Update Citations and Bibliography: create or reformat a bibliography in MS Word based on the citations included in the document. A style can be chosen from the pull-down list at **Style**.
5. Convert Citations and Bibliography: unformat citations included in the document. Via the same button field codes providing the connection between the citations in the MS Word document and their corresponding references in your EndNote Online library can be removed. After removing the field codes the citations and the bibliography have the same format as the other text in the MS Word document. However, functionalities of Endnote Online (such as reformatting the bibliography or editing the citations) are not possible anymore.
6. Export to EndNote Online: export the cited references to the unfiled list in your EndNote Online library. This is convenient if you want to save, print or distribute a list of references used in your MS Word document.
7. Preferences: change the Cite While You Write preferences, e.g. the application from EndNote desktop (X8) to EndNote Online.
8. EndNote Online Help: access the help information for EndNote Online (table of contents).

7.6.3 Format paper

Once a paper has been written in MS Word and citations are included in the text by using the **Cite While You Write plug-in**, you can format the citations and bibliography according to a particular (journal) style via this option in EndNote Online (Figure 74).

Save the MS Word document in rich text format (.rtf). Browse to the document in the box next to **File:**. Select the citation style needed in the drop-down menu next to **Bibliographic style:** e.g. the style for the **Journal of Agricultural Science**. You can change the list of styles according to your demands via the link **Select Favorites**.

Format Paper

For Rich Text Format documents (.rtf) ([See a sample paper](#)):

File: Citation_test.rtf

Bibliographic style: [Select Favorites](#)

☐ ignore unmatched citations

[Show format paper preferences](#)

Figure 74. Selection of bibliographic style for formatting the specified MS Word document via EndNote Online

Citations in the MS Word document that don't match with references in the EndNote Online library can be ignored during formatting by checking the checkbox next to **ignore unmatched citations**.

Click on the button **Format** to format the citations in the MS Word document and the bibliography according to the selected style (Figure 75). The button **Clear** empties all settings in the screen. The preferences for formatting the paper can be displayed and adjusted by clicking on the link **Show format paper preferences**.

Format Paper

Format Paper completed successfully.

Summary:

Matched citation(s): 3

Unmatched citation(s): 0

Ambiguous citation(s): 0

Citations:

matched: Atkinson, 2010 #184

matched: Bruins, 1986 #163

matched: Claessens, 2005 #107

Figure 75. Report in EndNote Online after formatting citations and bibliography in an MS Word document according to a selected style

Indicate whether you want to save or open the formatted document. The name of the used style is added to the MS Word document to make sure that the paper is saved under a different name (Figure 76).

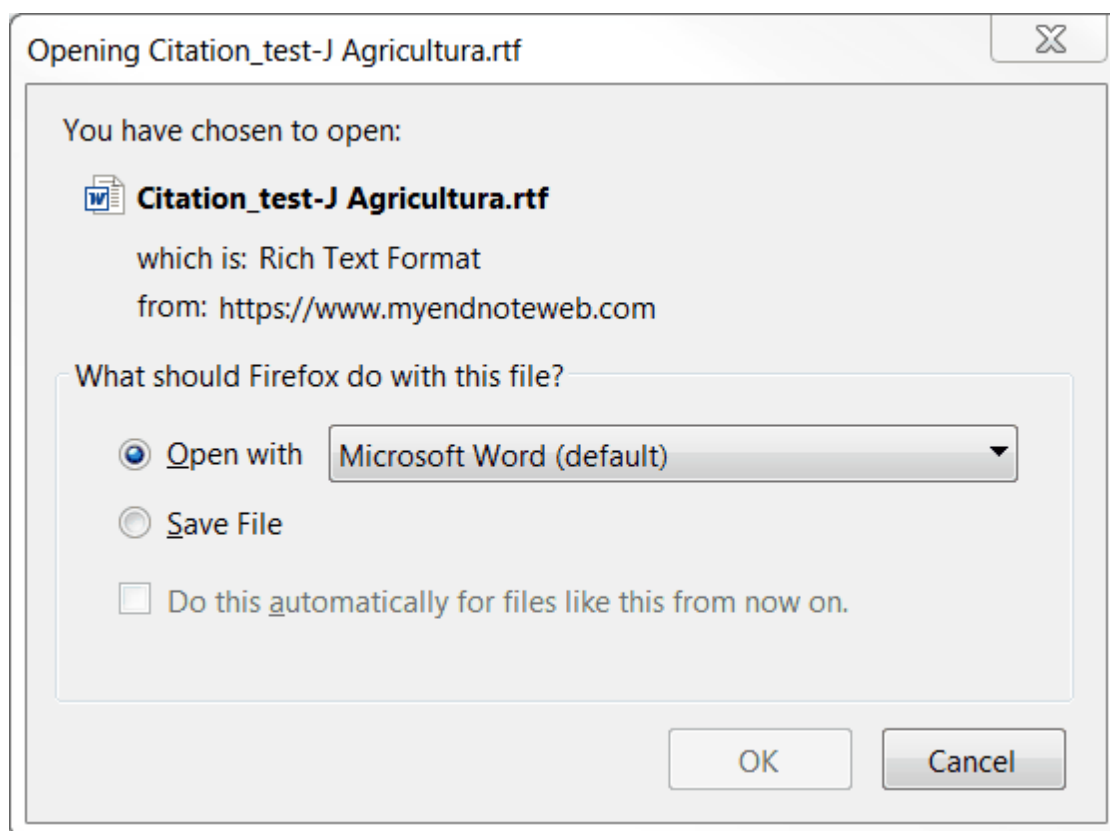
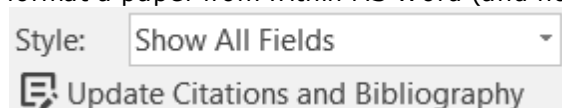


Figure 76. Request for opening or saving the MS Word document with formatted references

You can also directly format your bibliography according to a specific citation style in MS Word. To format a paper from within MS Word (and not from EndNote Online), use the button



in the **Cite While You Write** plug-in, and select the style you need.

7.6.4 Export references

References in the EndNote Online library can be exported in different formats for different reference management software packages via **Export References** under the tab **Format**.

Combine the references in a group or copy references to the Quick List to select them in the drop-down menu next to **References:**, and select the export style from the drop-down menu next to **Export style:** to export the references in BibTex, EndNote, RefMan or Refer formats, or as a Tab Delimited text file (Figure 77). Select the **Save**, **E-Mail** or **Preview & Print** button to save, e-mail or print the references.

Export References

References: Quick List ▼

Export style: RefMan (RIS) Export ▼

Save E-Mail Preview & Print

Figure 77. Selection of group of references and format to export references from the EndNote Online library

7.7 Match

EndNote Online provides a tool to find a suitable journal for your manuscript, based on the manuscript title, abstract and reference list (Figure 78). Using the Web of Science database, your manuscript's title, abstract and reference list are matched to potential journals where you could submit the work. Matches are based on citation data and relationships with your text and reference list.

Figure 78. Match tab in EndNote Online

Simply add the Title and Abstract of your manuscript by copy-pasting from your document (Figure 79). You can also select a group of references from your EndNote Online library to include. Click on **Find Journals >** and a list of potential journals indexed in Journal Citation Reports will appear (Figure 79).

Find the Best Fit Journals for your Manuscript Powered By Web of Science™

10 Journal Matches

Match Score	JCR Impact Factor Current Year 5 Year	Journal	Similar Articles	
	6.703 2015 7.409 5 Year	AMERICAN JOURNAL OF CLINICAL NUTRITION	1	<div>Was this helpful? ✓ YES ✗ NO</div> <div>Submit >></div> <div>Journal Information >></div>
Top Keyword Rankings <ul style="list-style-type: none"> mediterranean diet status health prospective cohort objective 		JCR Category NUTRITION & DIETETICS Rank in Category 3/80 Quartile in Category Q1		
	5.036 2015 5.471 5 Year	AMERICAN JOURNAL OF EPIDEMIOLOGY	3	<div>Was this helpful? ✓ YES ✗ NO</div> <div>Submit >></div> <div>Journal Information >></div>
	3.239 2015 3.306 5 Year	EUROPEAN JOURNAL OF NUTRITION	1	<div>Was this helpful? ✓ YES ✗ NO</div> <div>Submit >></div> <div>Journal Information >></div>

Figure 79. Journal Matches in EndNote Online, based on manuscript Title and Abstract

7.8 Options


The tab **Options** enables you to change your EndNote Online settings.

- **Password:** to change your password.
- **Email Address:** to change your email address.
- **Profile Information:** to change your name and opt in or out of product information.
- **Language:** to change the language of EndNote Online interface.
- **Subscription:** Information about your EndNote Online and Web of Science expiration dates.

7.9 Downloads

The tab **Downloads** gives links for downloads of the [Cite while you write plug-in](#)⁵⁵ for different operating systems, and the **Capture Reference** web browser button.

You can drag the **Capture Reference** to your browser's bookmarks or favorites toolbar. You

can then use this button  **Capture** when you are browsing for references online. Once you are on a website (e.g. of an article or book) that you want to include in EndNote Online, you simply click on the **Capture reference** button. A screen will appear with the bibliographic information (Figure 80), and you can choose whether to save the reference to Endnote (desktop) or EndNote online. Click **Save To** and the reference will be saved in your chosen EndNote Library.

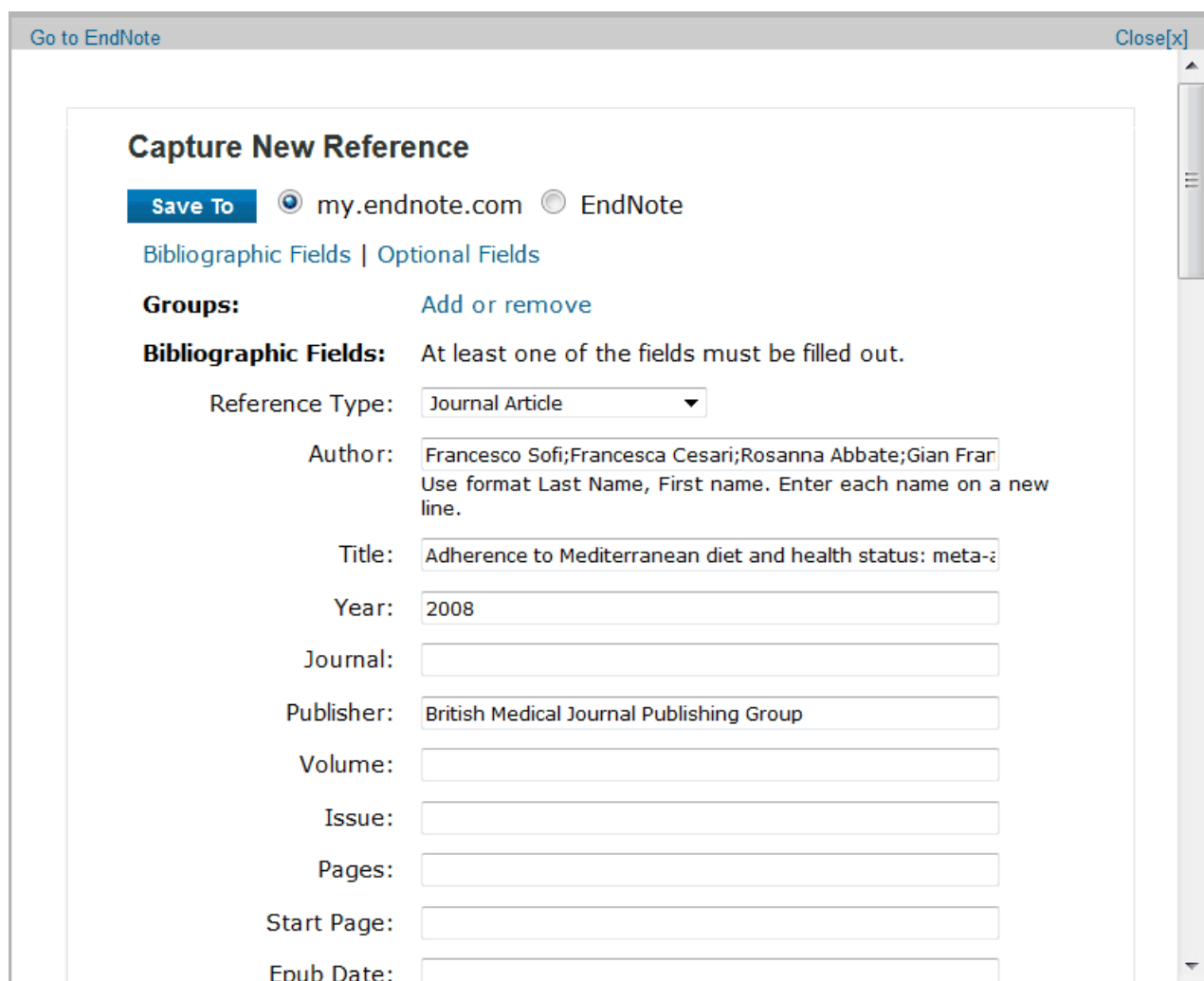


Figure 80. Capture reference and save directly to EndNote or EndNote Online

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