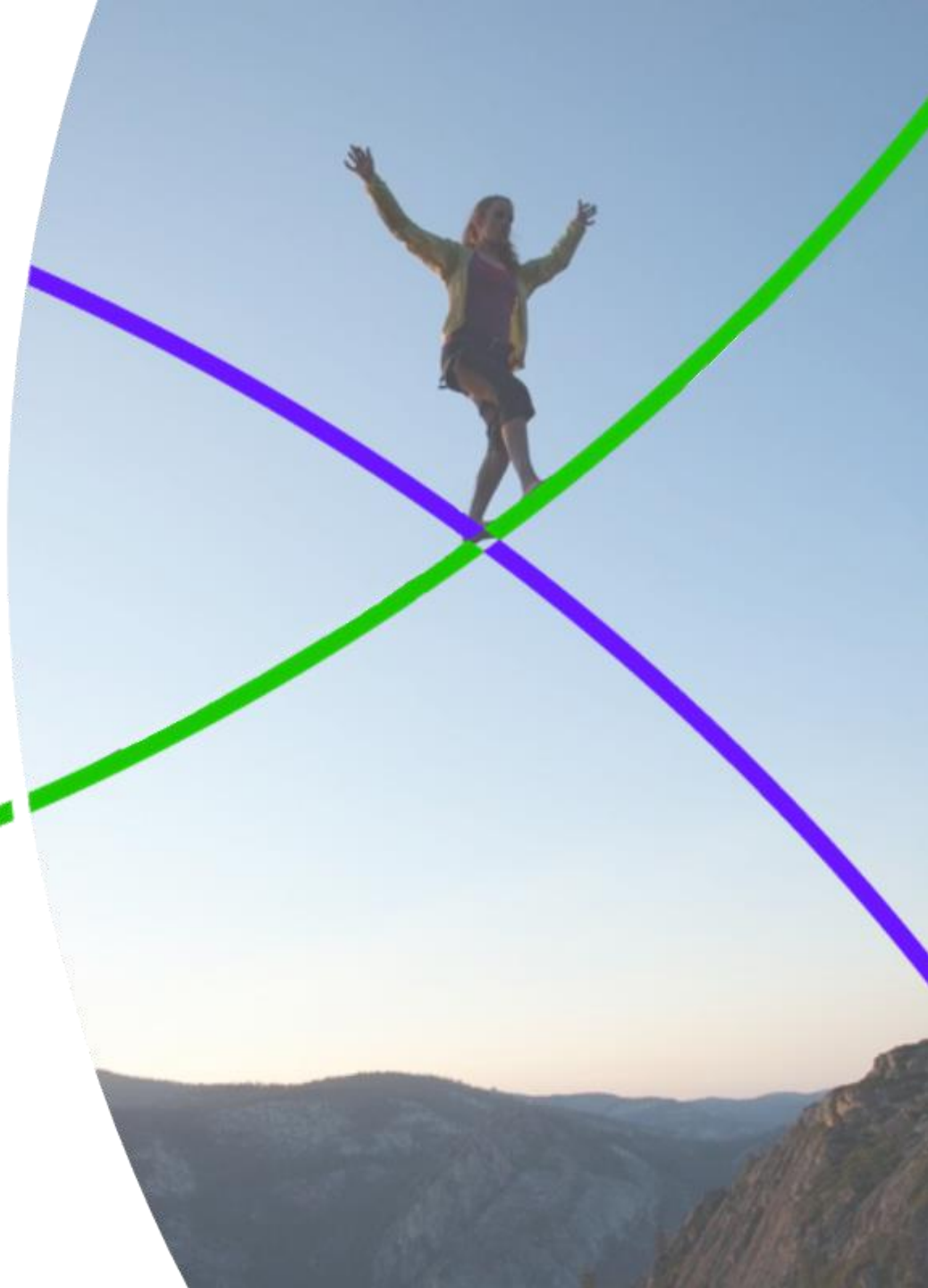# The next step for managing references: EndNote Desktop

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Clarivate
Analytics

What we will cover in this 60 minute session

If you are only using the online version of EndNote known as EndNote basic, you are missing out on a lot of great features, as well as being limited to only 2 gigabytes of attachment space and 50,000 references in the library. Here are some of the things you could be doing, with EndNote.

☐ You could synchronize all the references and groups in your library between up to three computers through EndNote online, then share the entire synced library with other EndNote users.

☐ You could import PDFs already on your computer.

☐ The *Find Reference Updates* feature could find missing information for references you already have, and update them.

☐ For references you already have, EndNote's *Find Full Text* could find PDFs to match them, automatically download those PDFs, and attach them to your existing records.

☐ You could read and annotate PDFs attached to EndNote records without ever leaving EndNote.

☐ You could also rename PDFs based on EndNote fields, rename any type of file attached to a record, or set up an auto-renaming option for PDFs in the preferences.

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☐ You could search records by field instead of only being able to search the whole record. You could also search the text of PDFs in your library.

☐ EndNote basic only has one group set, My Groups, and can only show custom groups that require you to add the reference to each group manually. Along with custom groups EndNote would also allow you to create—

o **Group sets**, which allow you to organize groups under project or topic headings.

o **Smart groups**, which are based on a search of the library as a whole.

o **Combined groups**, showing references drawn from a combination of other groups.

☐ The Web of Science version of EndNote basic has over 3,300 styles, but EndNote on the desktop has over 6,000 styles available, plus the ability to create your own custom styles.

☐ Some style manuals require a Digital Object Identifier (DOI) for references, if available, but the URL is acceptable if the DOI is not available. On the desktop you could set a style to insert the URL only if the DOI field is empty.

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☐ Journal names should be consistent in the bibliography, but may not be consistent in imported records. With a style setting and a properly set up journals term list, EndNote could create formatted bibliographies with consistent journal names.

☐ You could also create your own connection files or filters for custom databases.

☐ You put a lot of work into gathering, organizing, and customizing reference material. The *Compressed Library* feature on the desktop would let you create backups easily.

☐ In EndNote basic you can sort your library according to a limited set of options, but on the desktop you could not only select a custom sort order, you could also select the language sorting rules to be used.

You could also—

☐ Copy the reference as it would be formatted in the bibliography to paste it into notebooks or other applications.

☐ Insert references into PowerPoint documents on Windows.

☐ Find and replace text in EndNote fields.

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Change, move, or copy text in EndNote fields.

☐ Customize or even create reference types.

☐ Customize the fields used for duplicate searching.

☐ Create custom term lists to auto-fill information in fields, as well as use the default author, keyword, and journal lists.

☐ Create detailed independent subject bibliographies, just the thing for the yearly faculty publication list.

☐ Have more than one library open at a time and work in all of them, including libraries shared with you by other EndNote users.

☐ Change the fields displayed in the EndNote library list.

☐ Change the display font, even setting different fonts for different windows in EndNote.

☐ Change the screen layout. Note that although the reference data is the same for all synced libraries, the screen layout is customized for each computer profile.

☐ Set up a watched folder for PDFs to be imported.

☐ **Do most of this without an Internet connection.**

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Where to find out more

Our Quick Reference Guide

The EndNote Guided Tour: Windows

EndNote x9

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Clarivate Analytics / LibGuides / EndNote / EndNote / EndNote Online

EndNote: EndNote Online

Information on using EndNote, with links to resources.

| Home | For Users | For Trainers | For Administrators | EndNote Online |

EndNote Basic or EndNote Online?

EndNote and EndNote Online

EndNote is a reference management solution with both a desktop and online compone

When used online, it may be called "EndNote online." EndNote X8 users can synchroni

other EndNote X7 or X8 users. Their online library can contain an *unlimited number*

Our training LibGuides

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