



## Getting started with EndNote (EN) 20/21

1. Access EndNote Software at NOAA Library
  - Go to <https://library.noaa.gov/>
  - *Research Tools>EndNote (NOAA Staff)*
  - You must be on VPN or at a NOAA workstation to see this [Google site](#)
  - Follow the directions on the page to download the latest version of EndNote, and then get your IT group to install it on your federal computer.
2. Create an EndNote account
  - Go to <https://access.clarivate.com>
  - Click on Register
  - Use your NOAA email address and create an account. This account will work with other Clarivate products at NOAA, such as Web of Science and EN Click.
3. Create a Library in EndNote
  - Open the EndNote software on your computer
  - From the drop down menu, go to File>New
  - Make sure to save your .ENL file (as well as the associated .DATA file) on your computer, NOT Google Drive.
  - Whenever you want to open this library, go to the drive and click on the .ENL file.
4. Create Group Sets & Groups
  - Create a new group set or group that corresponds to sections of your writing product.
  - Go to Groups>Create Group Set.
    - A Group Set is a “container” that holds a number of groups.
  - Go to Groups>Create Group
    - Groups make it easier to organize reference into meaningful categories
    - You can drag and drop articles from a group into another group - they are copies.
5. Import/export files
  - To add citations or PDFs to your library, go to File>Import. Select whether it is an individual or folder of files, then under “Import Option” select the type of file you are adding. We recommend that you import references as .RIS files.
  - To export files from your EndNote library, highlight them and go to File>Export. Select the appropriate type of file and output style. To export citations as a .RIS file, use Text File and the “RefMan (RIS) Export” output style. Make sure to change File Name from .txt to .ris.
  - To export a PDF attachment from EndNote, go to the PDF window. Click on the “Open with Adobe Acrobat” icon. Once the PDF opens in Adobe, save it to your computer.
6. Edit metadata
  - Highlight a citation and select EDIT in the panel to access all metadata fields.
  - **Tip:** Each article has a NOTES field; you can add your own searchable keywords here.
  - **Tip:** Consider using CUSTOM fields for metadata unique to your project.

7. Customize your display fields

- You can change the data fields that are shown in the main page of your EN library. This will not change anyone else's display.
- Right click on the metadata group in the display and select the field you want to add or delete.
- You can only show 10 fields.

8. Create a SYNC library

- Open/create the one EndNote library you want to backup to the cloud. We recommend a naming convention that includes your name and SYNC LIBRARY so it is easy to recognize.
- Go to Edit>Preferences>Sync
- Put the login information for your EndNote account (email address and password)
- Unclick "Sync Automatically"
- Click on OK
- You can share this EN library with others to collaborate on the same set of references. You can give either "Read & Write" or "Read Only" permissions to others.

9. Sync your own or shared EN library

- Go to *Library>Sync*
- YOUR OWN LIBRARY: Sync your own sync library every time you open or close it.
- EN LIBRARIES SHARED WITH YOU: Every time you open or close a shared library, you should sync it so that all collaborators can see the latest version of it.
- In the column in the left, go to Sync Status to see when your library was last updated.

10. Open a shared library

- You have received an email invitation to work on someone else's library collaboratively.
- You must have EndNote desktop software on your computer and an EndNote login.
- Click on the link in the email and enter your EN account login.
- Open your Endnote Desktop software and go to *File>Shared Library*. The shared library will be identifiable by the email address of the OWNER.
- You will have either "Read & Write" or "Read Only" permissions assigned to you in this library.
- Sync the shared library (*Library>sync*) to get the latest update of the EN library.

11. Move references between shared & personal EndNote libraries

- Open a shared EndNote library and your personal Endnote Library - they will open in separate tabs/windows.
- Create a group in the library where you want to add references.
- Drag your mouse and highlight the references in one EndNote library, then drop them in the other EndNote library, into the group you created.

12. Create Smart Groups

- [https://youtu.be/WiL\\_WHsGTsE](https://youtu.be/WiL_WHsGTsE)
- Smart Groups allow you to find and organize references based on your search criteria in selected fields.

13. Annotate the PDFs.

- <https://youtu.be/fdLFO-qtdqI>
- PDF annotations are searchable, so add notes to PDFs that make quotes more findable.

14. Label citations in multiple ways

- **RATING** allows you to mark an article with a 1-5 star system and sort by that category. Make the RATING category visible by going to EDIT>PREFERENCES>DISPLAY FIELDS.
- **TAGS** can be added to an article. Create customizable tags in one of 7 colors: TAGS>CREATE TAGS. You can find a list of the tags you create in the left column.

15. Check for duplicated reference

- Click on the group or group set you want to deduplicate
- Go to Library>Find Duplicates
- If there is a duplicate, you will be shown both of the metadata files. Select the version you want.
- Learn more about [how to deduplicate here](#).

16. Find full text

- Highlight up to 250 citations at a time that you want EndNote to search for associated PDFs.
- Go to Reference>Find Full Text>Find Full Text
- A group set at the bottom of the left column will show the search in process. PDFs will be added to records if they are found.
- Learn more about [how to use EndNote's Find Full Text feature](#)

17. Create bibliographies

- EndNote has a feature called Cite While You Write that allows you to import citations into your paper if you have your EndNote library open and are working in Microsoft Word. The feature automatically formats the in-text citations and bibliography according to the citation style of your choice. Learn more [here](#).

Notes:

- EndNote Online is free and only requires that you [create an account](#) using your NOAA email address. In general, NOAA Library recommends that people use the EndNote Desktop software to take advantage of all the software's features.
- Tags are only available on EndNote 21
- View other EndNote20 videos at: <https://www.youtube.com/user/EndNoteTraining/featured>
- Contact EndNote support at Clarivate at this site:  
[https://support.clarivate.com/Endnote/s/Product-or-technical-question?language=en\\_US](https://support.clarivate.com/Endnote/s/Product-or-technical-question?language=en_US)