Advanced Endnote Features: Endnote 21

Swinburne Library EndNote resources page:

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## Share your research with others from a synced library

1. **Share the entire library** with a co-writer or thesis supervisor
   Windows and Mac: click File > Share and invite via email address.

2. **Share groups via EndNote online**
   If you are working with someone on a project and only wish to share a group, click the group to select it

   > **"Share group" from the Groups menu** to nominate who can view that group. The people you wish to share with need an EndNote account.

   They only have access to that group, not your entire library. If you plan to use several groups for the project you must share each one.

   Note: Smart group cannot be shared.

3. **View Shared groups and copy records to your personal library**.
   Any shared groups are listed under the header: **Groups shared by Others** under the Find Full Text group. Clicking a shared group will take you to view it in EndNote online.
   These records are not part of your personal library. If you wish to add them to your personal library you can select them in EndNote online and add them to one of your own Groups.

Export and complete references.

1. **Assign a PDF auto import folder**. While you are researching, download any new PDFs you find to this folder. EndNote will automatically import them. Where possible, EndNote will find and add the basic publication information to the new reference via the Digital Object Identifier (DOI). Click **Edit > Preferences** > **PDF Handling** and tick **Enable automatic importing**, then select your Download folder **> OK**

2. **Have EndNote create more informative PDF names.** If you add a file such as <1-s2.0-S0305748812001399-main.pdf>to your auto import folder, EndNote can attempt to rename the PDF to an author-date-title format e.g. Bendall-2013-The public life of maps.pdf You can also set your own custom renaming protocol. Click **Edit > Preferences > PDF Handling >** tick your preference and **OK**
   Note: old pdfs with file names of longer than 50 characters can cause syncing issues. Rename these pdfs before adding them to your library.

3. **Ask EndNote to find any missing publication information.** Some articles are listed as Ahead-of-press for some time in databases. If the DOI is included in the record, EndNote can try to find and add the volume, issue and page information via the DOI at a later date.

   I.   Click the reference

   II.   Click **References > Find Reference Updates**

   III. If anything can be found you will be presented with the additional information. Fill in blank fields or copy across additional information and save the changes.

   IV.   Watch out for mismatches. Sometimes EndNote matches the accession numbers from different databases and suggested a different article. Click **Skip**

4. **Ask EndNote to find the full text for articles.** You can transfer references from the Swinburne library subscribed databases, but the full text doesn't download with the basic publication information. Select your references > **References** > **Find Full Text** to search for DOI-coded references and automatically add the full text.

Manage references.

1. **Create Group Sets** Are you researching a range of topics? You can create group sets for each project or topic and create subgroups to manage the content.
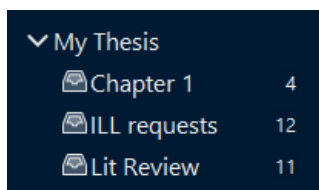
2. **Create Smart Groups to gather new relevant references** Set up a custom search (e.g. title contains biofuels, any field contains Australia, rating three stars+) to detect and automatically collect relevant new references as they are added to your library. (Be careful with your search terms, e.g. biofuel**s** will not retrieve biofuel.)

3. **Tagging References** Tag are custom labels and extra option for organizing references as an alternative to or in conjunction with using Groups. Coloured tags can be added to references as a visual label to quickly and intuitively identify references in your library under a collective heading. You can attach multiple tags to references, customise the colour and name of the tags, and add and remove tags as you require.