

# Library overview

## EndNote 20

We know you're going to love the modern interface redesign in EndNote 20, and this overview guide should help you quickly become familiar with the components that comprise the EndNote library window.

The **Groups** panel shows you both default groups and groups or group sets that you create for your research projects.

Use the **Advanced search** panel to find an item in your library or to query a remote database for new references to capture.

The **Summary** tab displays a detailed overview of a selected reference. Quickly alter reference metadata from the **Edit** tab.

The screenshot displays the EndNote 20 interface with the following components:

- Groups Panel (Left):** A sidebar showing a hierarchy of groups including 'Avian Intelligence', 'Bats', and 'My Groups'. It lists various sub-groups and their respective reference counts.
- Advanced Search Panel (Top):** A search interface with multiple criteria (Author, Year, Title) and search options like 'Simple Search' and 'Search Options'.
- Reference List Panel (Center):** A table of library records with columns for Author, Year, and Title. The selected record is highlighted in green.
- Summary Panel (Right):** A detailed view of the selected reference, including the title, authors, journal information, and a preview of the article's abstract.

Initiate an **Online Search** by selecting a favorite **connection file** or press **more...** to browse your complete list of databases.

The **Reference List** panel shows the individual references stored in your EndNote library, also known as library records.

The **Preview** panel shows you how a reference would appear formatted with a specific output style.

# Adding a new reference

## EndNote 20

You'll often enjoy automatically capturing new references in your EndNote library without manually populating the information. You also have the option to manually create an entry in your library for any reference materials you can't capture.

1. Create a new entry manually by clicking **References > New Reference** with your EndNote library open.

### New Reference window

The screenshot shows the 'New Reference' window in EndNote 20. The window title is 'New Reference' and the browser address bar shows 'Journal Article'. The form contains the following fields and values:

- Author:** Pepperberg, I. M.
- Year:** 2020
- Title:** ...logy of Intelligence: Some Thirty Years Later
- Issue:** (empty)
- Pages:** 13
- Start Page:** (empty)
- Review:** (empty)
- Short Title:** (empty)
- Alternate Journal:** Front. Psychol.

Four callout boxes provide instructions:

- Author field:** Input author and editor names in **Last name, First name or First name Last name** format. Be sure to enter one name per line.
- Title field:** Select the appropriate **reference type** to display field labels that correspond to the details required for this type of material.
- Review field:** Fields linked to a term list will display new terms in red to let you know it's the first time this term appears within this field.
- Alternate Journal field:** Populate as many fields as you'd like, at the minimum, those you'd like to include within a formatted reference list.

# Library syncing

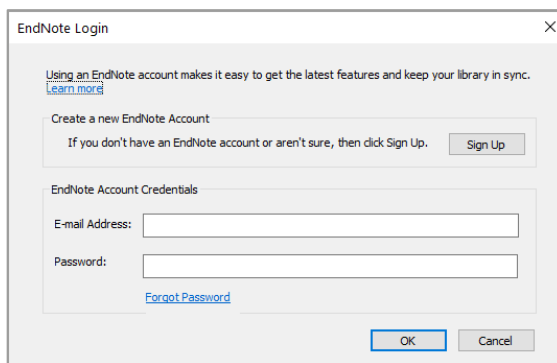
## EndNote 20

You work in more than one location, and you might like to have the contents of your EndNote library available on all your computers. The Sync feature in EndNote 20 facilitates this goal and increases your productivity.

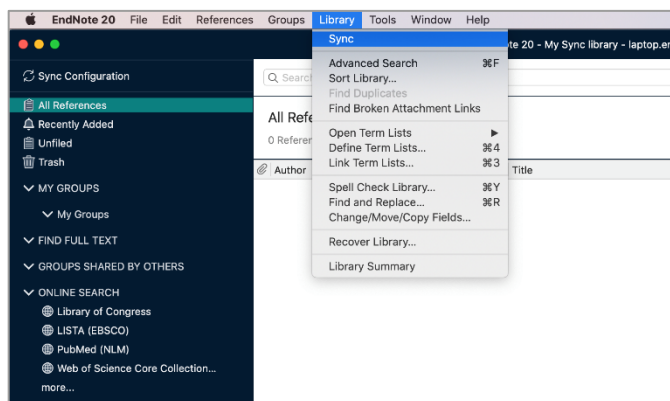
1. Start configuring Sync by opening the EndNote library you'd like to designate as your EndNote Sync library and then click **Library > Sync**.

### EndNote Sync steps

2. Click **Sign Up** to create a new EndNote account or sync with an existing account by inputting your login credentials.



3. Once every 15 minutes, EndNote will check your library to look for changes to send or receive. Click **Sync Status** to confirm all reference information is successfully syncing between your desktop library and your online account.
4. To sync on a second or third computer, start by creating a fresh EndNote library by choosing **File > New**. Click **Library > Sync** to input your EndNote account credentials and perform your initial sync to copy down all existing library information.



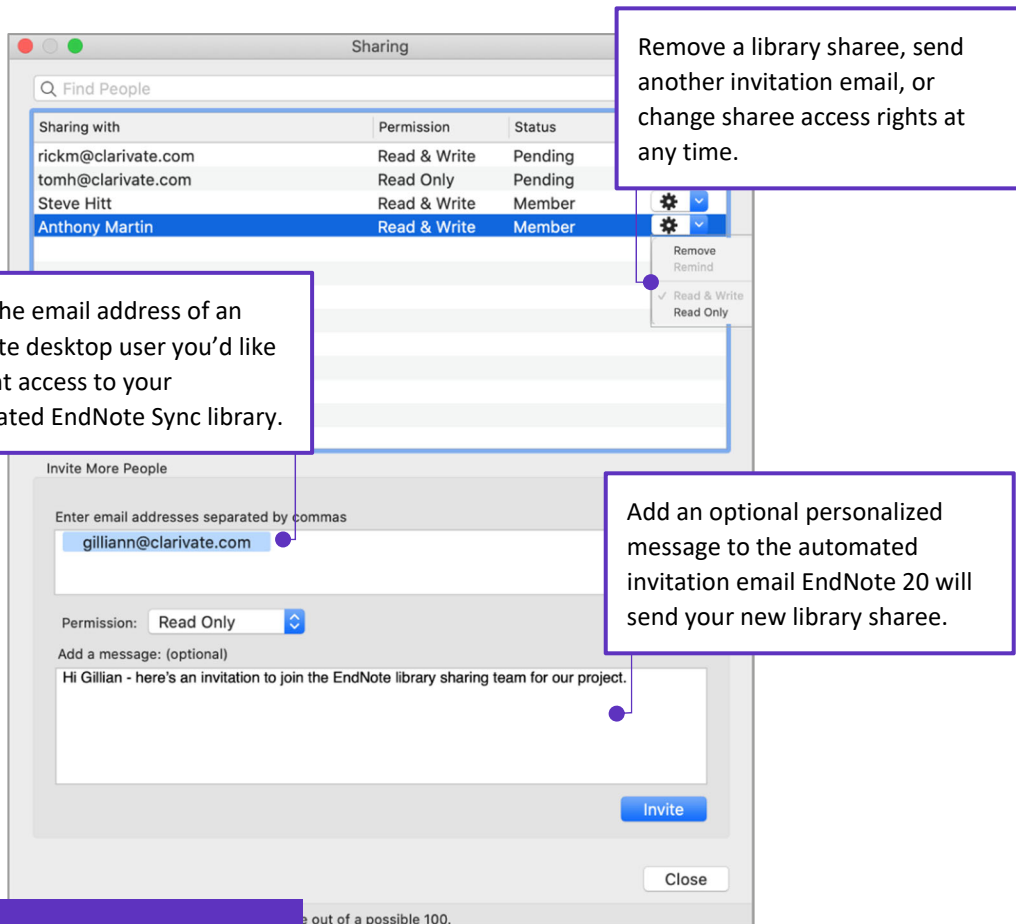
# Library sharing

## EndNote 20

Collaboration is essential to your research. The Library Sharing feature in EndNote 20 allows you to grant access to your designated EndNote Sync library to up to 100 other EndNote desktop users.

1. After configuring EndNote Sync, open your designated Sync library and click **File > Share** to configure access to your co-authors and colleagues.

### EndNote Sharing window



The screenshot shows the 'Sharing' window in EndNote 20. It features a table with columns for 'Sharing with', 'Permission', and 'Status'. Below the table is an 'Invite More People' section with a text input field for email addresses, a 'Permission' dropdown menu, and an 'Add a message' field. A callout box points to the table, explaining that users can be removed, invited again, or have their permissions changed. Another callout points to the 'Add a message' field, explaining that a personalized message can be added to the invitation email. A third callout points to the 'Invite' button, explaining that it sends the invitation.

Sharing with	Permission	Status
rickm@clarivate.com	Read & Write	Pending
tomh@clarivate.com	Read Only	Pending
Steve Hitt	Read & Write	Member
Anthony Martin	Read & Write	Member

Remove a library sharee, send another invitation email, or change sharee access rights at any time.

Input the email address of an EndNote desktop user you'd like to grant access to your designated EndNote Sync library.

Add an optional personalized message to the automated invitation email EndNote 20 will send your new library share.

Invite

Close

Want to share only part of your library? Share custom groups with others via Group Sharing.

# Cite While You Write: Insert Citation

## EndNote 20

Stay in Microsoft Word while citing references from your EndNote library with Insert Citation.

1. Position your cursor within your body of text where you'd like to add a citation and then press the **Insert Citation** shortcut found on the EndNote 20 tab in Microsoft Word.

### Insert Citation window

The screenshot shows the 'EndNote 20 Find & Insert My References' window. It features a search bar with 'parrot bird' entered, a search dropdown menu set to 'Libraries', and a list of search results. The first result is highlighted: Brucks, 2020, 'Parrots Voluntarily Help Each Other to Obtain Food Re...'. Below the list, the metadata for the selected reference is displayed, including the reference type (Journal Article), record number (2466), author (Brucks, D. von Bayern, A. M. P.), year (2020), title, journal, publication date, ISSN, and DOI. An 'Insert' button with a dropdown arrow is visible at the bottom right, with a menu showing options like 'Insert & Display as: Author (Year)', 'Insert & Exclude Author', 'Insert & Exclude Year', and 'Insert in Bibliography Only'.

Search for a word, series of terms, or phrase you'd find within an EndNote library reference you'd like to cite.

Search for matching references within your open libraries or from any custom groups shared with you.

Click the arrow button to show a drop-down menu of different automatic citation customization options to apply.

View all underlying metadata stored in your EndNote library references to help disambiguate similar search results.

Want to insert references by choosing them in your library? Try out Insert Selected Citation(s).

# Cite While You Write: Edit & Manage Citation(s)

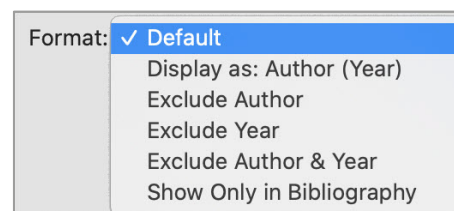
## EndNote 20

Formatting guidelines sometimes require the customization of in-text citations so that specific citations are formatted differently. The Edit & Manage Citation(s) feature of Cite While You Write allows you to make changes on a citation-by-citation basis.

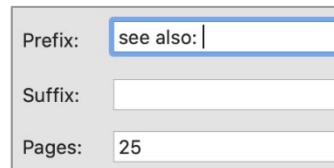
1. Start the citation customization process by highlighting the formatted in-text citation that you'd like to modify and then press the **Edit & Manage Citation(s)** shortcut found on the EndNote 20 tab in Word.

### Edit & Manage Citation(s) settings

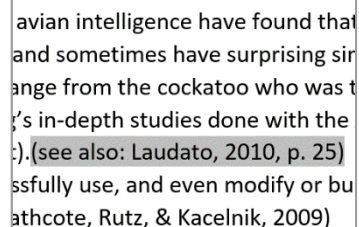
2. Use the **Format** menu to customize the appearance of an individual in-text citation. You can present author information outside of the parenthetical citation, exclude the author, the year, or both. You can also instruct EndNote to display this reference in your bibliography only.



3. Include a preceding word or phrase to your in-text citation by adding custom text to the **Prefix** field. The **Suffix** field functions in the same manner, but the Suffix field text appears at the end of your parenthetical citation. EndNote output styles set up to include **Cited Pages** will display a page number or range of pages entered in the **Pages** field within an in-text citation. This information helps your reader know where they can find a concept or other data you're including within the source work you're referencing.



4. Press **OK**, and you'll see your citation customizations appear in real-time with Instant Formatting enabled.



Find these features and more on the EndNote 20 Edit and Manage Citation(s) window.