

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 shows the EndNote 20 interface. On the left is the 'Groups' panel with a tree view of 'MY GROUPS' including 'Avian Intelligence', 'Bats', and 'My Groups'. The main area is the 'All References' list, which is a table with columns for Author, Year, Title, Journal, Last Updated, and Reference Type. A search panel at the top allows filtering by Author, Year, and Title. On the right, the 'Summary' tab for a selected reference is visible, showing the title 'Evaluating the Effectiveness of an Ultrasonic Acoustic Deterrent for Reducing Bat Fatalities at Wind Turbines' and its abstract.

Author	Year	Title	Journal	Last Updated	Reference Type
	2009	Leaf-nosed bat	Encyclopæ...	8/21/2019	Encyclopedia
Aguilera-Alc...	2020	Role of scavengers in providing non...	Ecological L...	9/17/2020	Journal Article
Aizpuru, O.; ...	2016	Fishing Technique of Long-Fingered B...	Plos One	9/17/2020	Journal Article
Allen, Glover...	2004	Bats: biology, behavior, and folklore		8/21/2019	Book
Arnett, E. B.; ...	2013	Evaluating the Effectiveness of an Ultr...	PLoS One	9/18/2020	Journal Article
Avila-Flores, ...	2004	Ecological, taxonomic, and physiologi...	Journal of ...	9/16/2020	Journal Article
Bat Conserva...	2008	Bat Conservation International		8/21/2019	Web Page
Binfield, Peter	2008	At PLoS ONE we're batty about bats	PLoS: Public...	8/21/2019	Blog
Bird, C. D.; E...	2009	Insightful problem solving and creativ...	Proceeding...	9/16/2020	Journal Article
Bianco, G.; C...	2019	A shot in the dark: Sport hunting of de...	Journal for ...	9/17/2020	Journal Article
Brinkov, S.; K...	2009	Intense echolocation calls from two 'w...	Journal of E...	9/16/2020	Journal Article
Brucks, D.; vo...	2020	Parrots Voluntarily Help Each Other...	Curr Biol	9/17/2020	Journal Article
Bundell, S.	2020	The parrots that understand probabilit...	Nature	9/17/2020	Journal Article
Chiu, C.; Mos...	2007	The role of the external ear in vertical ...	J Acoust So...	9/16/2020	Journal Article
Chiu, C.; Xian...	2008	Flying in silence: Echolocating bats ce...	Proceeding...	9/16/2020	Journal Article
Clayton, Nic...	2009	What Do Jays Know About Other Min...	Neurobiolo...	9/16/2020	Book Section
Clements, K. ...	2018	Initial Evidence for Probabilistic Reaso...	Journal of C...	9/17/2020	Journal Article

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

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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

Select the appropriate **reference type** to display field labels that correspond to the details required for this type of material.

Press the **Save** button once you're ready to add this new reference to your active EndNote library.

Input author and editor names in **Last name, First name** or **First name Last name** format. Be sure to enter one name per line.

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.

Populate as many fields as you'd like, at the minimum, those you'd like to include within a formatted reference list.

The screenshot shows the 'New Reference' window in EndNote 20. The 'Reference Type' is set to 'Journal Article'. The 'Author' field contains 'Pepperberg, I. M.'. The 'Year' is '2020'. The 'Title' is 'The Comparative Psychology of Intelligence: Some Thirty Years Later'. The 'Journal' is 'Frontiers in Psychology', 'Volume' is '11', and 'Pages' is '13'. The 'Type of Article' is 'Review'. The 'Alternate Journal' field shows 'Front. Psychol.' in red text. The 'ISSN' is '1664-1078' and the 'DOI' is '10.3389/fpsyg.2020.00973'. A 'Save' button is visible in the top right corner.

Library syncing

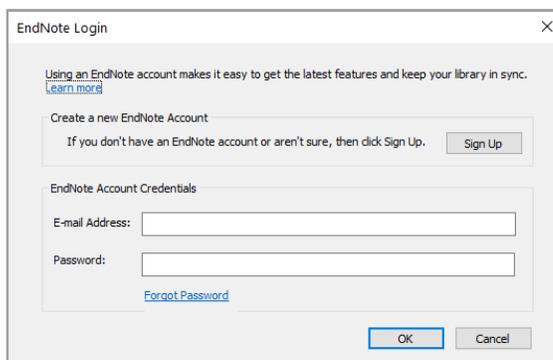
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You work in more than one location, and you might like to have the contents of your EndNote library available on all your computers. The Sync feature in EndNote 20 facilitates this goal and increases your productivity.

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

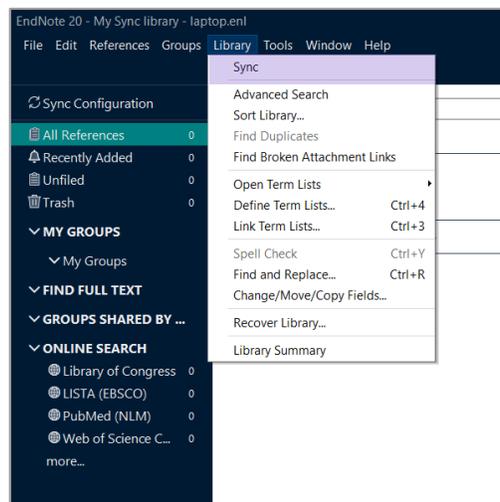
EndNote Sync steps

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 being synchronized 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, and the Library Sharing feature in EndNote 20 allows you to grant access to your designated EndNote Sync library with 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 'EN Sharing' window in EndNote 20. It features a search bar for finding people, a table of current sharees, and an 'Invite More People' section. A callout box points to the search bar, stating: 'Input the email address of an EndNote desktop user you'd like to grant access to your designated EndNote Sync library.' Another callout points to the 'Invite More People' section, stating: 'Add an optional personalized message to the automated invitation email EndNote 20 will send your new library sharee.' A third callout points to the settings gear icon in the sharee table, stating: 'Remove a library sharee, send another invitation email, or change sharee access rights at any time.'

Sharing with	Permission	Status	
	Read & Write	Member	⚙️
	Read Only	Pending	⚙️
	Read Only	Member	⚙️

Invite More People
Enter email addresses separated by commas
Permission: Read & Write
Add a message: (optional)

Remove
Remind
Read Only
Read & Write

our library with 3 people out of a possible 100.
21st Annual... 10/23/2020 Conference Proceedings

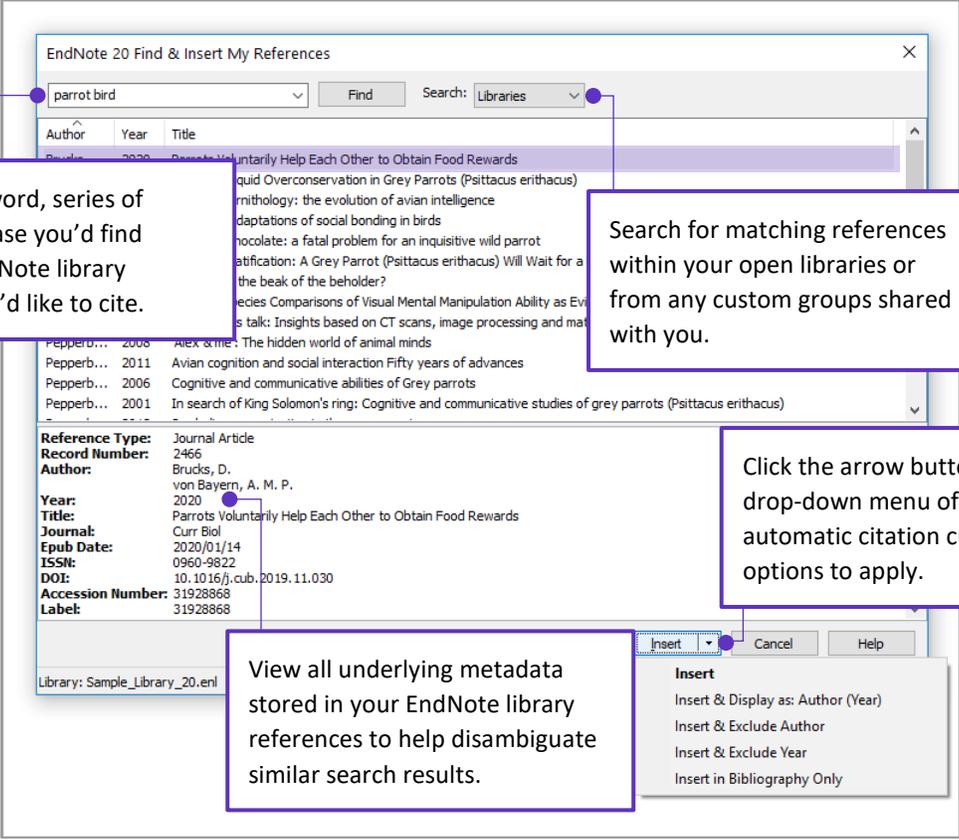
Cite While You Write: Insert Citation

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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 includes a search bar with 'parrot bird' entered, a 'Find' button, and a 'Search:' dropdown menu set to 'Libraries'. Below the search bar is a list of search results with columns for Author, Year, and Title. A callout points to the search bar: 'Search for a word, series of terms, or phrase you'd find within an EndNote library reference you'd like to cite.' Another callout points to the search results: 'Search for matching references within your open libraries or from any custom groups shared with you.' A third callout points to the 'Insert' dropdown menu: 'Click the arrow button to show a drop-down menu of different automatic citation customization options to apply.' A fourth callout points to the metadata section: 'View all underlying metadata stored in your EndNote library references to help disambiguate similar search results.' The metadata section includes fields for Reference Type, Record Number, Author, Year, Title, Journal, Epub Date, ISSN, DOI, Accession Number, and Label. The 'Insert' dropdown menu is open, showing options: '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)

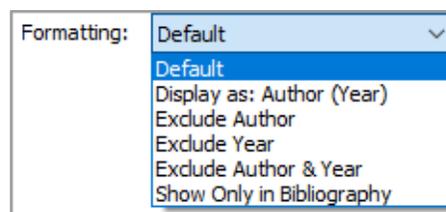
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Formatting guidelines sometimes require the customization of in-text citations so that specific citations are formatted differently. The Edit & Manage Citation(s) feature of Cite While You Write allows you to make changes on a citation-by-citation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

Prefix:	see also:
Suffix:	
Pages:	25

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

avian intelligence have found that
and sometimes have surprising sir
ange from the cockatoo who was t
's in-depth studies done with the
(see also: Laudato, 2010, p. 25)
ssfully use, and even modify or bu
athcote, Rutz, & Kacelnik, 2009)

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