01. Transcript for EndNote Zoom Tutorial

This is the first series on EndNote, and to get started, you first need to get EndNote, so we're going to focus on getting EndNote. It's a free resource for managing your references, a bibliographic citation manager, free from the libraries at Texas Tech University Health Center Libraries. My name is Barbara Ballew. I am the Research and Instructional Librarian for the TTUHSC Libraries, and my office is on the Lubbock Campus. This is the first of a series of workshops that we will be having on Thursday afternoons. Our goals for this session are to find out how to access EndNote on the TTUHSC EndNote LibGuides and to use the links on that LibGuides to create an EndNote Online account and to download and install the EndNote Desktop to your computer.

A little about EndNote. It's a reference management software system that lets you create your own personal library of all your references and files of reference related material that are attached to those references. You can sync your online references with your EndNote Desktop library and it does have capability of working on an iPhone or iPad, although I haven't had a chance to practice with those, so we won't really be focusing on those, at least in this series. But you can learn how to get EndNote and how to begin using it.

So one of the things that you can do with EndNote, is you can share your references with a groups of collaborators by sharing groups or you can share a whole library and you can use the references that you saved and cite them whenever you're writing your papers, your articles, and they will be formatted in the citation format that you selected. It's a free product for TTUHSC users. There an online version, sometimes it's called EndNote, sometimes referred to as EndNote Basic and then there's EndNote X9 ,which is the most recent version right now of EndNote Desktop.

So to get EndNote, were going to start with the EndNote Online to create your free account, and then download and install EndNote X9 on your computer. These are all purchased by the Library so they're free. EndNote X9 again allows you to create a custom library of all your references. EndNote Online will let you access those references from any computer with an internet connection. Another feature of EndNote is it's searchable whether you're using the Desktop version or the Online version. And this makes using your saved references really fast and easy. So, let's begin with EndNote Online. Just sign up for a free account.

So, you go to the TTUHSC website: www.TTUHSC.edu/libraries, and that takes you to the library website. On the library website, you'll see a screen similar to this one. There's a link that says Libguides Enter Here. You're going to follow that link. That will take you to one of the Library's Libguides, and that's just the way that we arrange our resources. There are custom links so you can use those resources whether you're on campus or not. You'll enter your eraider credentials, and if you're coming from a distance, and you can find the library references easier on the Libguides than if we just tried to cram everything onto one page. So, this is the home Libguides. It has a horizontal row of tabs and across that row of tabs, there's a Home tab, a Resources tab and some other tabs. You're going to hover your mouse over the Resources tab and select

EndNote and RefWorks on the dropdown menu that appears. That will take you to a LibGuides where all of our bibliography and citation tools of the library have been put together. Again, you have a row of tabs, one of those tabs is the EndNote tab. You'll click on that tab, and then it takes you to a Libguide that is just strictly EndNote. Again, this is at ttuhsc.libguides and you can bookmark this and the links. You can use those because you're going to go back and refer to this Libguide again whether you're doing EndNote Online or installing EndNote Desktop. This is the address for just the EndNote Libguides. There are a few tabs here. There's About, Versions, Help, and Uninstall.

On the Help tab, you'll see a link labeled Tutorials and that will take you to some tutorials that the Clarivate company has put together. Clarivate is a company that sells us our access to EndNotes. And so those are general tutorials for all EndNote users, and some things in those tutorials don't play well with the Library's resources, but it can give you a good general idea of how EndNote works. There's a link that says Searching with EndNote and basically that tells you about what doesn't work.

The online search feature that's built into EndNote doesn't play well with the majority of the TTUHSC's databases. You can get it to play with PubMed, but it doesn't give you access to the full text articles. There's an easy way to get around that. You can search a database, and then just import your references into EndNote. And really that's a more accurate way to search than using their built-in search feature. But you would use the built-in search just to search through your references, just to find a particular one. There's also a link to Technical Support that takes you to EndNotes' Technical Support, which can be very helpful if you have a difficult or complicated question. The Proofing link that just tells you that the Library does not agree to approve any of your citations. You'll need to consult your style manual to do that. And then the Contact link takes you to library contacts that can maybe answer basic questions about TTUHSC Library's EndNote.

So on the EndNote Tutorials, you'll see some links The Getting Started Guide, and some Self-paced Tutorials. These are all links to Clarivate company's resources. So if you're interested in, for example, signing up for some of their online training sessions, do so; but I'll warn you, they tend to be at odd hours because this is an international company, so they may be trying to do a session that is convenient for somebody in Great Britain. But you could certainly look through those upcoming sessions. You may find one that's interesting to you. So, in the braces here, on the EndNote Tutorial page are some links to those resources. Under the Versions tab, you'll see a link that says Compare Versions. Use EndNote Basic online, Install EndNote Desktop. And then there is a link with information about the iPad Application.

So, we'll start with EndNote Online, creating a free account. On the Versions menu of the EndNote Library LibGuides for EndNote, there's a link that says use EndNote Basic Online. Click that link, and you have the option of either signing into an existing account, or if you're not a member yet, use the register button to register for an account. You'll see Welcome to EndNote and link to setup your account. And there's a little bit of information about syncing. And that's all there is to it. You set up your account. You write down your username and password so that

you can login any computer that has internet access. And you're ready to install EndNote X9, the Desktop version. So again, on the Library's EndNote LibGuides under the Versions tab, there's a link that says install EndNote Desktop. Click that link. You'll see some boxes that have different headers. The box that has the header that says Prepare will offer you some guidance on preparing to install. For example, if you have not updated your Microsoft Office in some time, you'll want to do that before you start because there are components of EndNote that play with your Microsoft products, like Microsoft Word. And if you're not comfortable installing software on the computer you use and it's a HSC computer, feel free to contact your departmental IT staff to assist you, or you can contact the IT Helpdesk at 743-1234 to assist you with installing. If there are some updates, those you're going to want to install after you've installed EndNote Desktop X9. You might have to wait a little bit for those updates.

Another thing that you're going to need is the product key, or the license key. It will ask you for that during the installation process. And so, on the EndNote Libguide below that Prepare box, there's a box with a header: TTUHSC License Key, and there's a link that say, login here and obtain and TTUHSC Product Key. You'll login with your eraider and from the chart that you'll see, select the Product Key for EndNote, and you can copy and paste it. If that doesn't work, try typing it in manually. And then, last of all, under the Install header, there is a link to download EndNote for Windows and a link to download to EndNote for a Mac. When you're installing, be sure that you don't save the files to Box, and don't save them to the Cloud. EndNote doesn't work well with those cloud-based services. The libraries will become corrupt overtime if you save it to a cloud service. So don't save it on a network drive, not in Box, not on the Cloud. Save it on your computer's hard drive, and note that if you're using a Mac, put it in the Applications Folder on your computer's hard drive.

So, once you've installed EndNote, then you'll be ready to create your first library. And there are instructions in those videos that they're clarivate training that will show you that, or you can attend future sessions. Session Two will talk more about the different features of EndNote, and so for right now, I want to show you a LibGuide that I've created specificially for this workshop, so I'm going to have to stop here, and do a new share.. So this is the way the EndNote series 2020 LibGuide is set up. Bascially it's got a link to the Clarivate EndNote LibGuide that has links to the all of the resources about EndNote. You can look at those. The TTUHSC EndNote LibGuide which has a link for you to download EndNote X9, create an online account, and a short six-minute video that demonstrates EndNote in Windows from the Clarivate company, and a guided tour that you can download for Windows and the same video for Mac users. And a guided tour for Mac users. So again, that's that EndNote Workshop LibGuide link.

So once you've installed EndNote X9, if you don't import some references, it's just going to be an empty string, similar to what you see here. But if you've been using EndNote Online, and you sync it with your EndNote Desktop, then, all your references are going to be the same. EndNote Online and EndNote Desktop should have all the same references. but I do want to caution you, if you've loaded ten-thousand references in your EndNote Online, when you sync, it's going to take a while for those references to be added to your library. So if you're going to sync, make

sure you have time to wait for that to happen. Sometimes people have been surprised at how long it takes the first time around. So also included with X9 are some training libraries. And you can use those training libraries to work through the Guided Tours and so they're links on the Clarivate EndNote LibGuides. It might be a little bit confusing, but the Clarivate EndNote LibGuides has links to the EndNote Guided Tours and useful training libraries to work through the Tours. they're kind of step-by-step, so they're a good way to familiarize yourself with EndNote.

Now on a Mac library screen, once you've got some references in there, both Mac and Windows screens look very similar. They're arranged in different panels. The panel on the left is where your groups are going to be once you start to add some references and arrange them into groups. There's a search area, where you can search through your references if you're looking for a particular word or author's name. You can pull up references that match that. Then you have your whole references list, kind of in the middle. Over on the right, whichever reference you have highlighted, then you can see the record for that — all the different fields, whether there's something in it or not. And then below that is a preview that shows you how it's going to look in your chosen format. And there are a few buttons up the top that have to do with this online search mode that's built in, but that doesn't really play well. But they're there. And on a Window's screen, it's very similar. Here's your group area, and your references list in the middle, and you have over the right, the one particular reference where you can see all the fields populated. There's a layout button that will let you resize or change the position of some of these panels, and so they look very similar whether it's Windows or Mac. I'm going to be demonstrating all of that, because I don't really don't have access to a Windows computer, right now. But Session Number 2 is coming up on September 24th.

I'm going to stop sharing my screen so that I can see you. Heather said, there will be recordings sent out to all of the attendees. That's good! And the Library will also have some way to save recordings, but our process is a little slow, so if you're using your own IT Heather, maybe you can make those recordings available faster than I can. But when I can get a library version of it, I will add it to the series LibGuides. That's the one that I showed the link to. So, if you have a question that you'd just like to say, unmute yourself and ask, or else, use chat. Are there any other questions or comments? Thank you so much for your assistance Margaret and Heather. We will try to work out some of the bugs next time around. In the meantime, everyone -- have a good Labor Day weekend coming up, and we'll talk to you again later in September if you join us for the second workshop.