



DOG AGING PROJECT

Endnote Shared Library Guide

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Introduction

One of the key components to the success of the Dog Aging Project is our culture of collaboration. The Shared Endnote Library will allow all of us to store, share, and sort references and media that may be pertinent to various projects, without clogging up our personal libraries. The library is curated and maintained by a library administrator who regularly adds, reviews, and updates references within the library.

By requesting access to the shared library, you accept responsibility for helping maintain the utility and integrity of the library, and acknowledge that you have read this document in its entirety.

Library Access & Permissions

- To gain access to the shared library, a person must:
 - have a desktop version of Endnote X7.2 or higher, though Endnote X8 or higher is recommended due to size and sharing limitations on previous versions.
 - be registered with Endnote.
 - enable syncing on the Endnote desktop program.
 - contact the library administrator (carkenberg@cvm.tamu.edu) for an invitation, and provide the administrator with the email address the requester registered with Endnote.
- To determine the email registered with Endnote select Edit > Preferences > Sync
 - From this location, you can determine your credentials (email address) and enable sync.
- There are two types of permissions for the shared library:
 - Read-only: user can review and copy references, but cannot change anything or add new references.
 - Read and Write: user can review and copy references, create/edit groups, upload pdf files, and make add new references.

DAP members are given Read and Write permission by default. Changes to the shared library are monitored by the library administrator. Damaging changes will be reported to DAP senior staff. Permissions are subject to change at the discretion of DAP senior staff based on study needs and user utilization.

Questions About Syncing

- Endnote only allows one online library per email address though you can have many local libraries (on your computers) registered to an email address.
 - A connection to the online library is required to access the shared library as the shared library is synced/updated via the online system.
- If you sync your personal, local library to your online account (using the sync tool or automatically by enabling sync for that library), syncing the shared library will cause the shared library to merge with your local, personal library.
 - You will see all of the shared library references within your personal library.
- It will not merge your library with the shared library.
 - Others will not be able to see the references from your personal library within the shared library.

- Others will not be able to remove references from your personal library, however, as references are added to the shared library, they will also be added to your library.
- Syncing the shared library by itself does not alter your personal library.
- You will get a warning pop-up before this happens.
- If you get any warnings about merging libraries, please contact the library administrator (carkenber@cvm.tamu.edu).

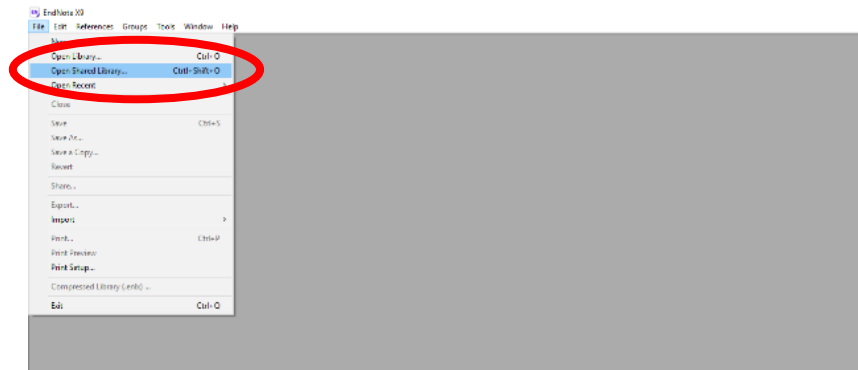
Endnote DAP Best Practices

- To move references between your personal library and the shared library, please select only the specific references you would like to copy. **Please ensure that the reference is not already present prior to adding it to the shared library. Do not import an entire library.** (If you feel importing an entire personal library would be useful to the project, please see [Appendix I](#)).
 - To select more than one reference at a time, hold CTRL and select each individual reference you want to transfer before right-clicking (PC only).
 - To select all of the references in a group, select the first reference, hold SHIFT and click on the last reference in the group, then right-click (PC) or hold CTRL and click (Mac).
- For this to work most effectively, both your private Endnote library and the shared Endnote library need to be open at the same time.
 - You can tell which library you have open by looking in the upper left-hand corner above the references window on PC or in the center of the references window above the Clarivate logo on Mac.
 - The libraries can be opened within the same program window or within separate program windows.
- We are currently using mostly Smart Groups over Groups because:
 - the Smart Group algorithm will sort references into groups for us based on our preset parameters.
 - it should cut down on the need to manually move references into groups.
 - it will make it easier to include references into more than one group.
- Since we are primarily using Smart Groups, to copy a reference into the shared library please use the “Copy Reference To” function instead of the “Add Reference To” function.
 - The “Copy Reference To” function will allow you to add the reference(s) to the whole library, which the Smart Groups can then sort.
 - The “Add Reference To” function requires you to add the reference(s) to a specific group, but it does not allow the addition of references to Smart Groups.
- Due to its current limitations, we will not be logging into the Endnote online program to access the shared library. All shared library access will be done via Endnote for desktop.
 - If we need to share specific references or groups of references using this method in the future, please contact the library administrator to discuss.
 - The Endnote Shared Library Guide will be updated or an addendum added to include any Endnote Online processes.

Endnote for PC

Connecting to the shared library

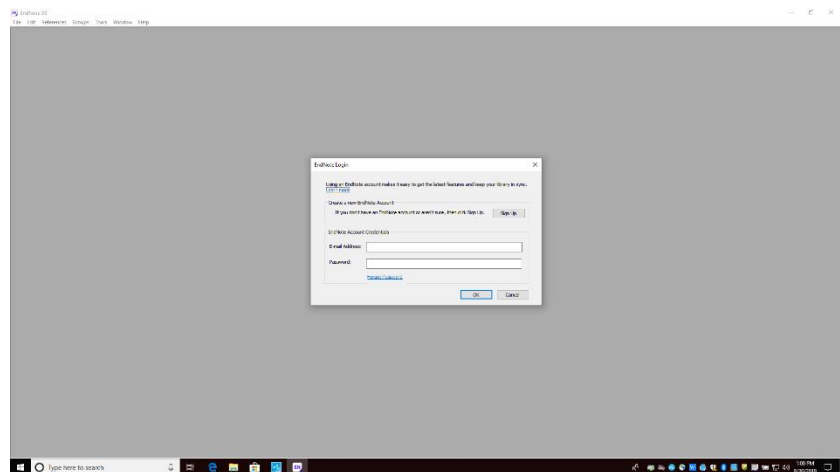
- After opening Endnote, select File > Open Shared Library.



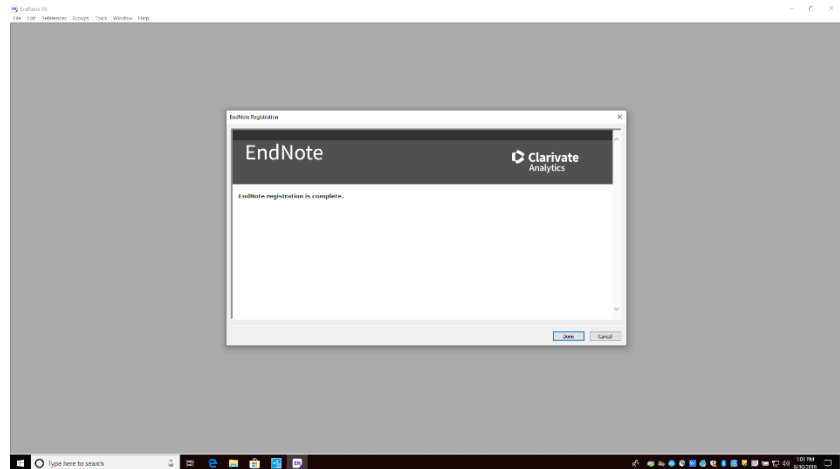
- It may prompt you to log in if you have not already done so.

- You will need to register online at this point if you are not registered. (Endnote X7.2 or higher is required, though X8 or higher is recommended.)

- Ensure that sync is enabled. (More information about syncing later.)

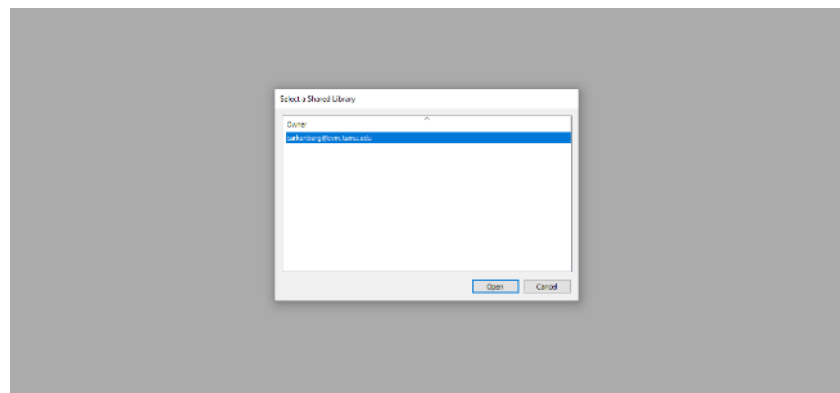


- You will get a confirmation once your registration is successful.



- Select the shared library you would like to open.

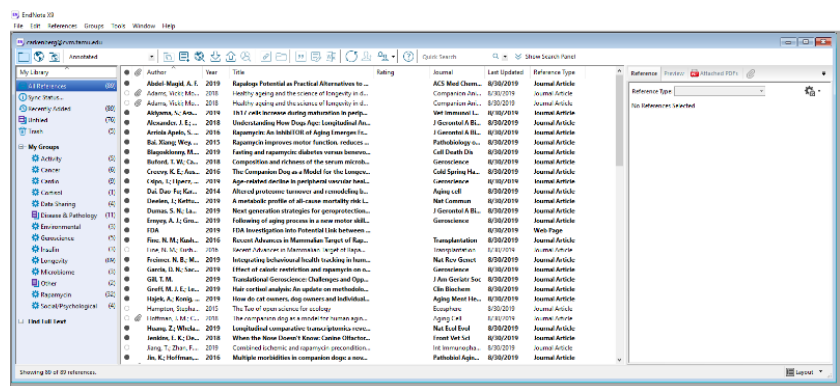
- In this case:
carkenberg@cvm.tamu.edu



- The shared library will open in a new library window within your Endnote window, or can be opened in a whole new window. It is separate from your personal library.

- The shared library will have all of the same functionality as your personal library.

- You should be able to add to the library, create new groups, search for new references, copy references, etc.

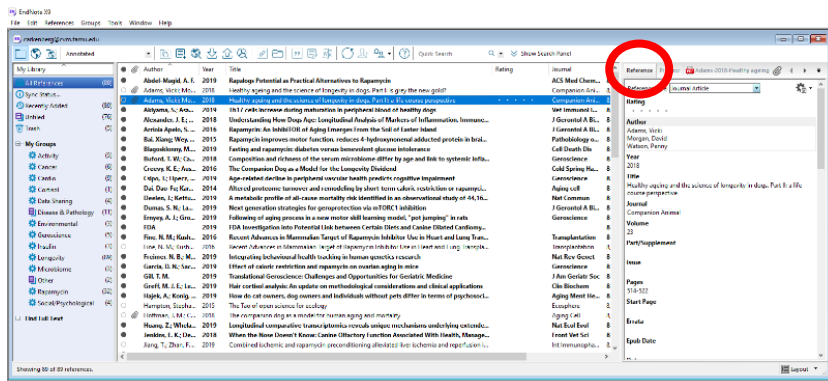


Please keep both your personal library open and the shared library open if you would like to copy references between them.

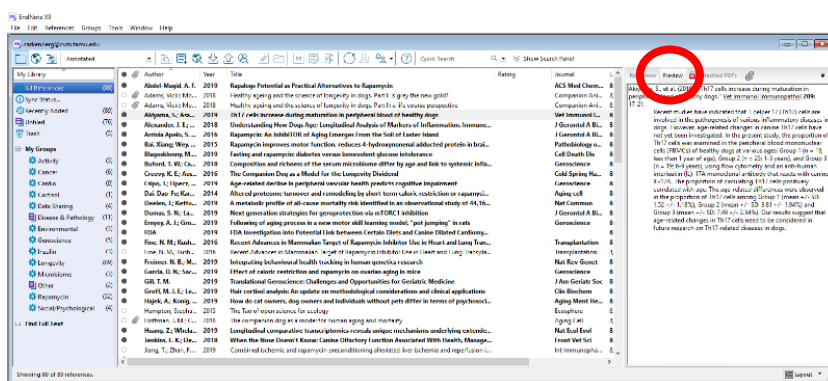
Preview panels

- When you click on a reference, you can preview information within the preview panel to the right by clicking on the appropriate tab.

- The first preview tab is the “Reference” panel. It shows information about the article, including the author(s), year published, title, URL, abstract, DOI, etc.

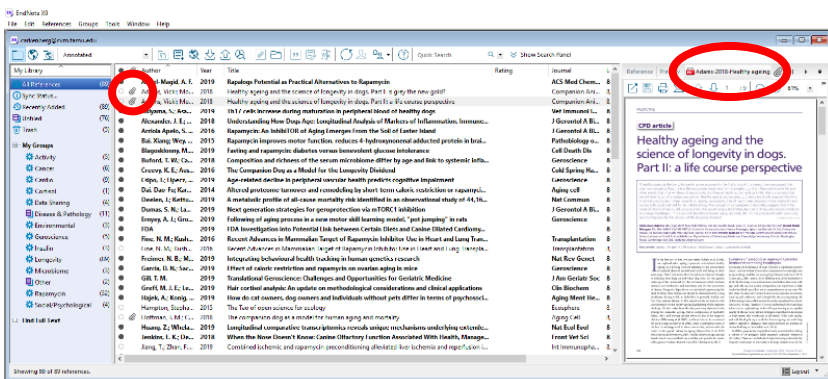


- The second tab is the “Preview” panel. It shows the reference citation, as well as the abstract or summary (when available).



- The third tab is the pdf/attachment panel. If there is a file attached to the reference, you can preview it by clicking on this tab.

- You can tell a reference has an attachment by looking for the paperclip symbol in the main panel.

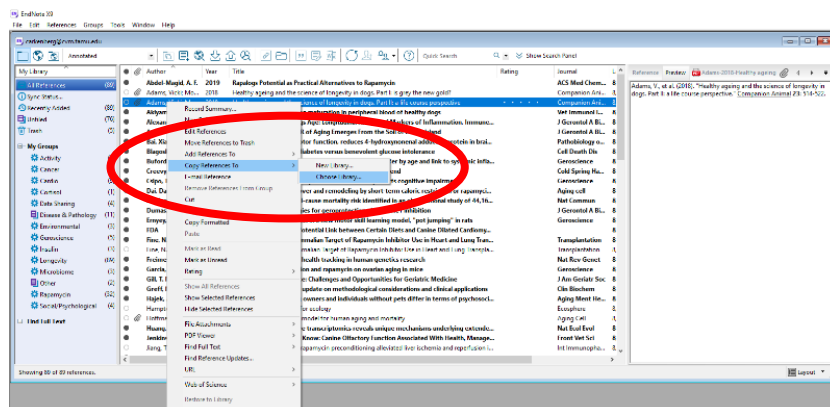


Copying citations to/from the shared library

- Start from within the reference library with the reference you would like to transfer.

- Highlight then right-click on the reference.

To select more than one reference at a time, hold CTRL and select each individual reference you want to transfer before right-clicking.



To select all of the references in a group, select the first one, hold SHIFT, then click on the last reference in the group.

- Click on “Copy References To.”

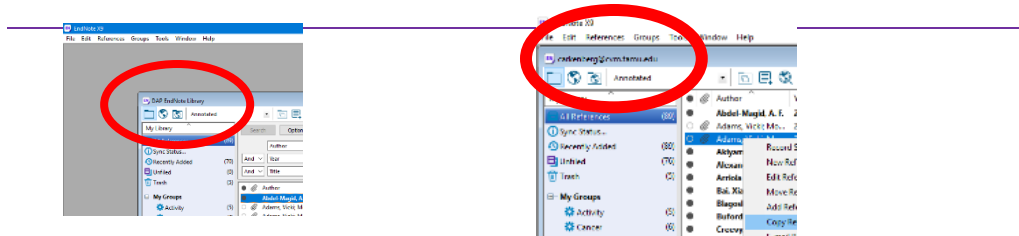
- Your open libraries will be listed to the right. If you want to transfer to a library that you do not see, select “Choose Library” and locate your library on your local drive.

* If you have both of the libraries open, the library you are not currently in should appear in the menu to the right.

*Please note that the “Add Reference To” function requires you to specify an existing Group but does NOT allow you to specify a Smart Group. As most of our groups are currently Smart Groups, adding them using the “Copy Reference To” function allows them to go into the main library and get sorted into the Smart Groups.

***** If you would like to import your entire reference library, please see [Appendix I](#).**

For this to work most effectively, both your private Endnote library and the shared Endnote library need to be open at the same time. You can tell which library you have open by looking in the upper left-hand corner above the references window.



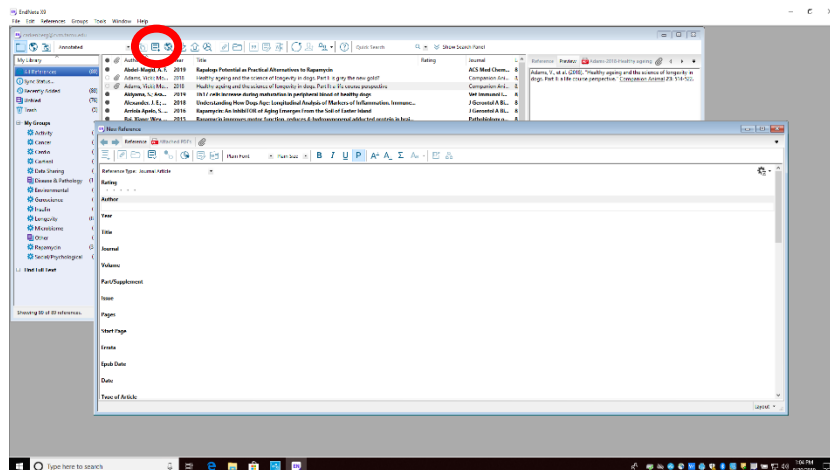
Adding new references manually

- Click on the  symbol, or click References > New Reference to insert a reference manually.

- You can select the type of reference from the drop-down menu at the top of the new window.

- Complete as much of the information as you can, and attach a pdf file if desired.

- Click the  at the top right and save when prompted.

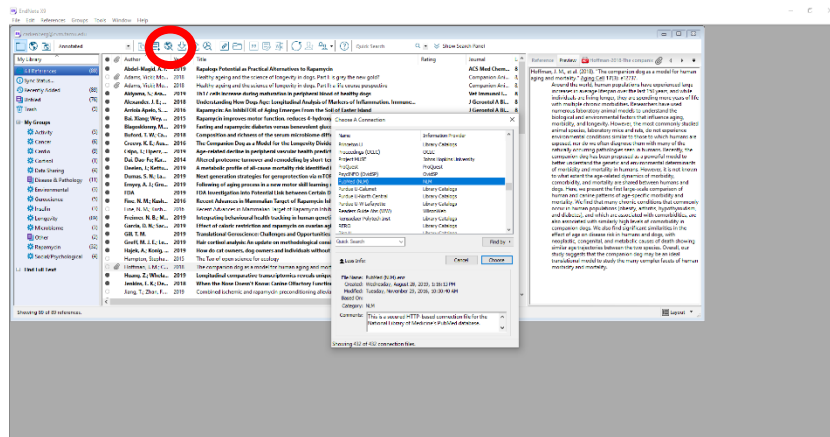


Online Search

- Click on the  symbol, or click Tools > Online Search to search for references.

- Select the journal/source you would like to search through.

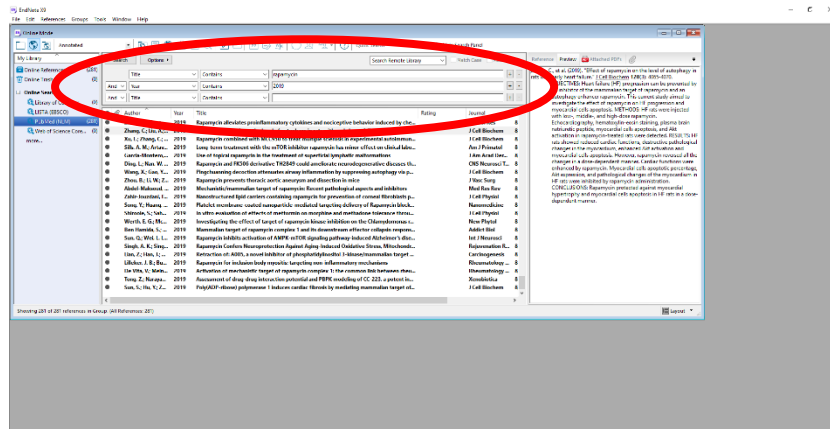
- Click “Choose.”



- Fill in the search parameters at the top of the page and hit “Search” or press Enter on your keyboard.

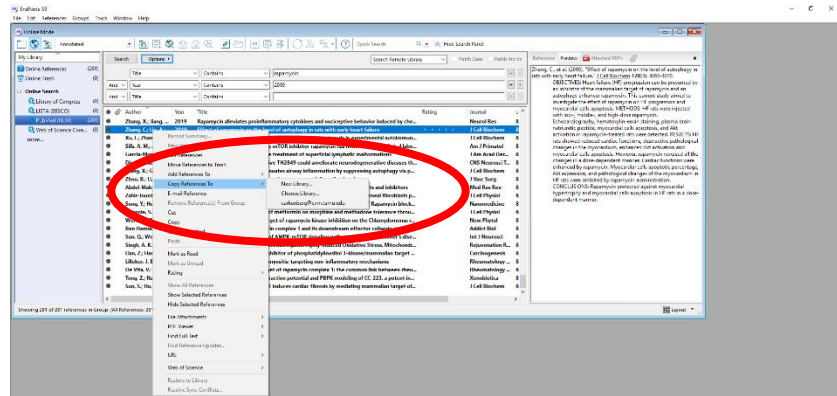
- The results will populate below.

- You may get the option to select a range (number) of references to review.



- The preview panel to the right is the same as previously explained.

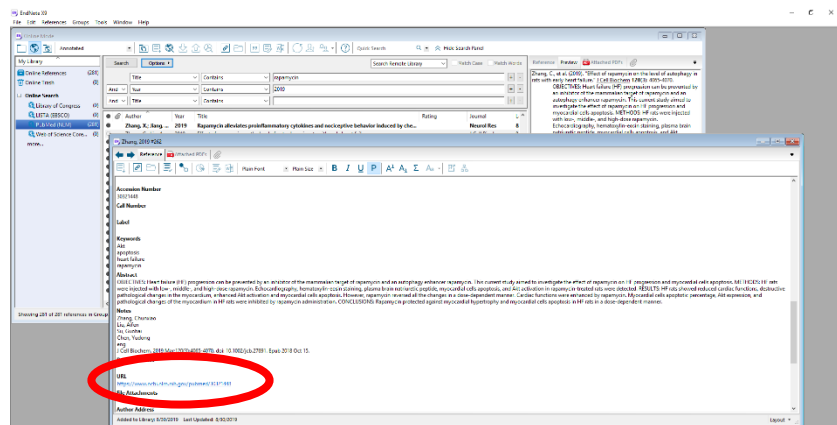
- To copy a reference to a library, follow the steps as described in [Copying citations to/from the shared library.](#)



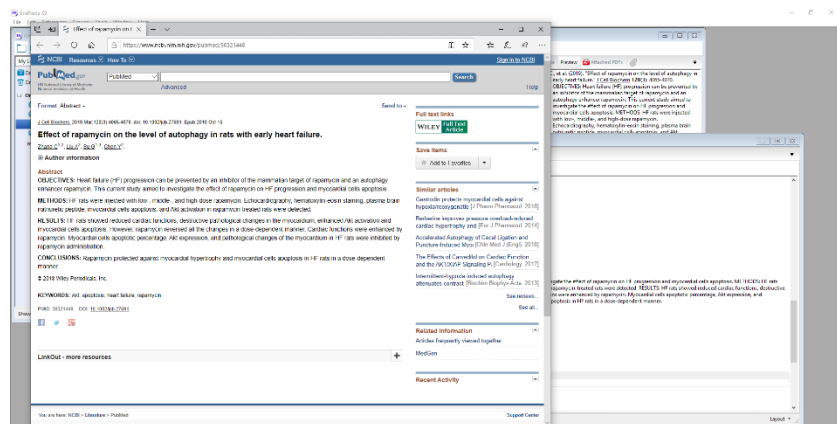
- Double click on an article to bring up its information.

- The URL information is near the bottom of the page when present.

- DOI information is also usually available here.



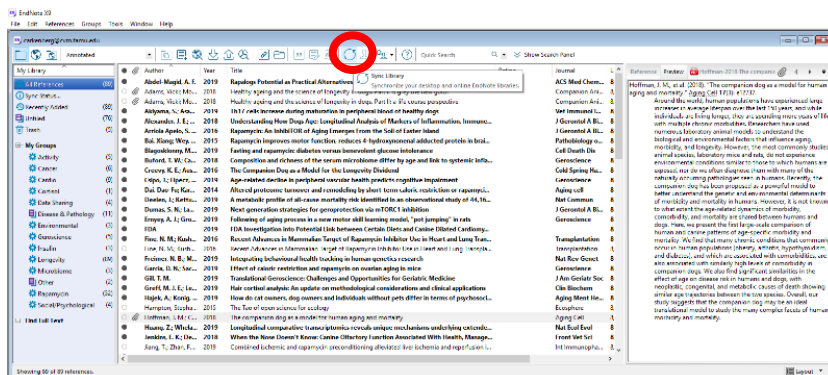
- Click on the link to bring up the article.



Sync library

- Click on the  symbol, or click Tools > Sync to manually sync your instance (the version you are seeing) of the shared library to the online Endnote account.

- The library should sync on its own when you log in/out.

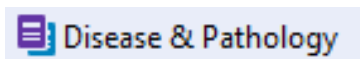


- Endnote only allows one online library per email address.
 - A connection to the online library is required to access the shared library as the shared library is synced/updated via the online system.
 - The shared library is backed up locally by the library administrator.
- If you sync your personal, local library to your online account (using the sync tool or automatically by enabling sync for that library), syncing the shared library will cause the shared library to merge with your local, personal library.
 - You will see all of the shared library references within your personal library.
- It will not merge your library with the shared library.
 - Others will not be able to see the references from your personal library within the shared library.
 - Others will not be able to remove references from your personal library, however, as references are added to the shared library, they will also be added to your library.
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Smart Groups vs. Groups

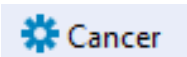
- Groups are essentially folders containing references. Any user with appropriate permission can create/edit a Group or Smart Group (Please see [Appendix I](#) for more information about permissions and groups.)

- A normal group is symbolized by a purple & blue document:



- References must be manually added to these types of groups by dragging them over to the group, or right-clicking and adding them to the group.

- A Smart Group is symbolized by a gear:

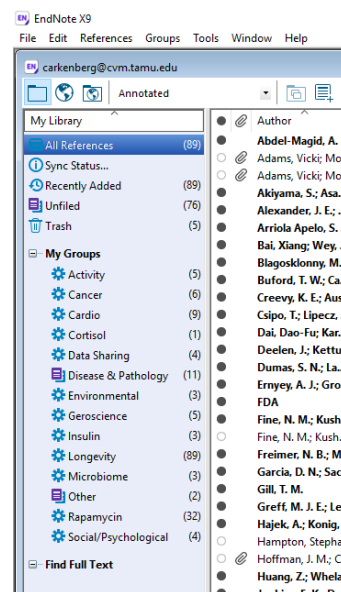


- References are automatically added to this type of group by an algorithm based on specific parameters set by the user. For example: for the Cancer Smart Group, I've set it to place any references where the abstract utilizes the word "cancer" into the cancer Smart Group. Other Smart Groups have more complex settings, drawing on multiple keywords in the abstract, title, or notes section.

- To create a group, right-click anywhere under the "Groups" heading and select either to create a "Group" or a "Smart Group."

- To edit a group, click on the group you would like to edit, right-click and select "Edit Group."

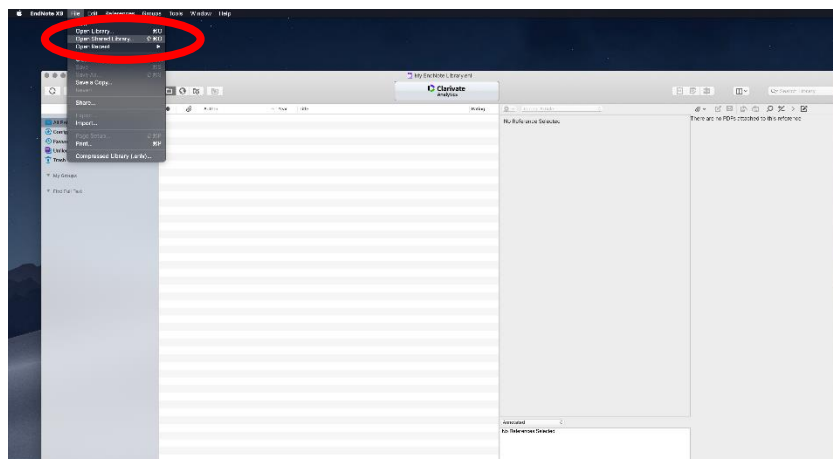
- This will allow you to change to parameters the algorithm uses to sort references into this group. This does alter the group for the entire shared library, including everyone who accesses it.



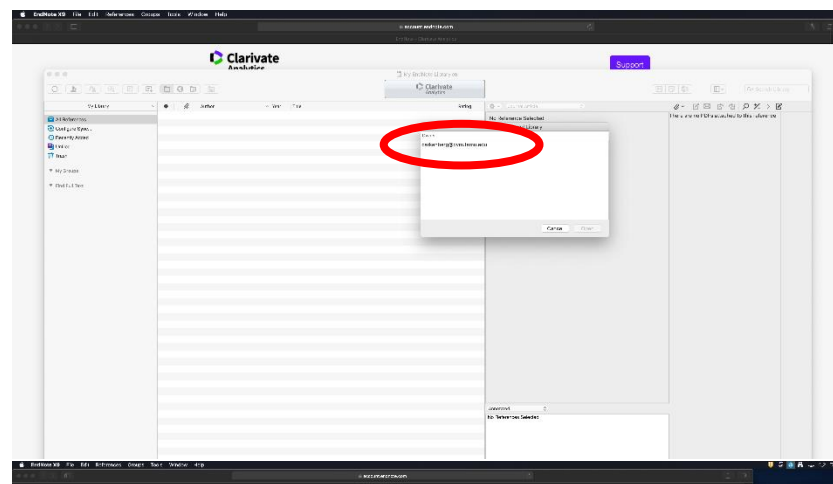
Endnote for Mac

Connecting to the shared library

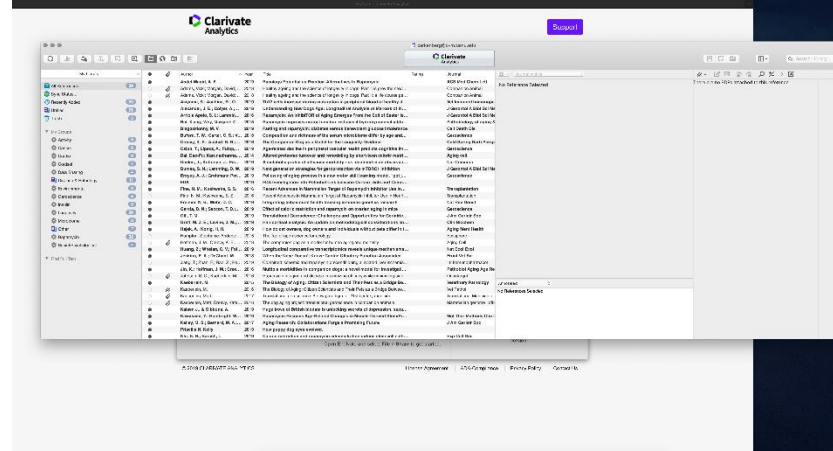
- After opening Endnote, select File > Open Shared Library.
- It may prompt you to log in if you have not already done so.
- You will need to register online at this point if you are not registered. (Endnote 7.2 or higher is required, but X8 or higher is recommended.)



- Ensure that sync is enabled. (More information about syncing later.)
- Select the shared library you would like to open.
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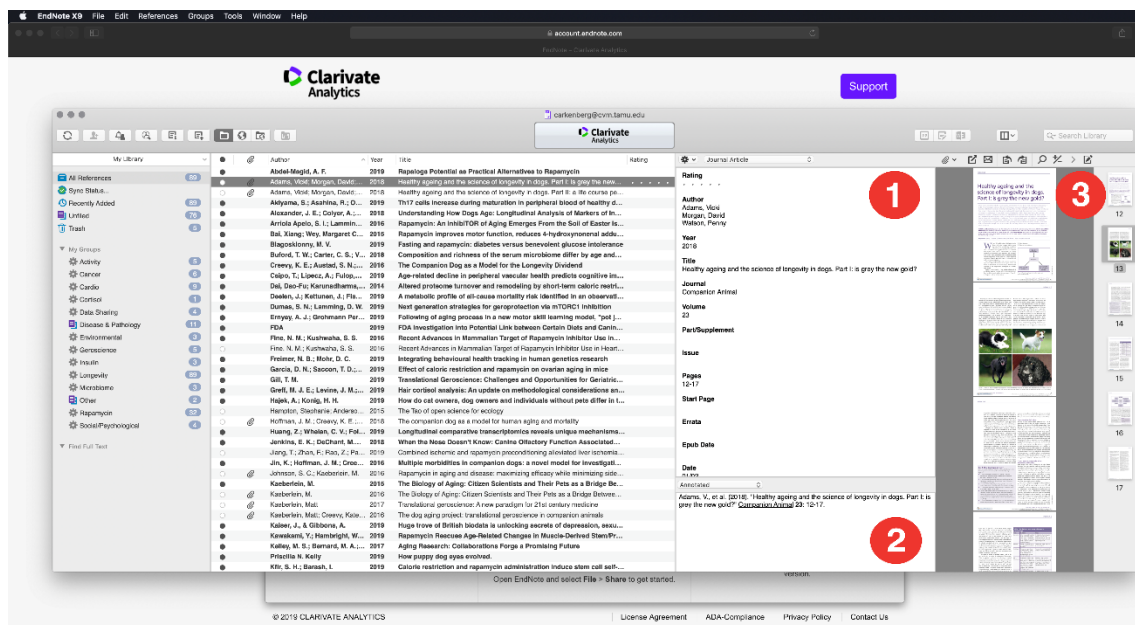
- The shared library will open in a new window or a second tab within your original window, separate from your personal library.
- The shared library will have all of the same functionality as your personal library.
- You should be able to add to the library, create new groups, search for new references, copy references, etc.



Please keep both your personal library open and the shared library open if you would like to copy references between them.

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- When you click on a reference, you can preview information within the preview panel to the right.
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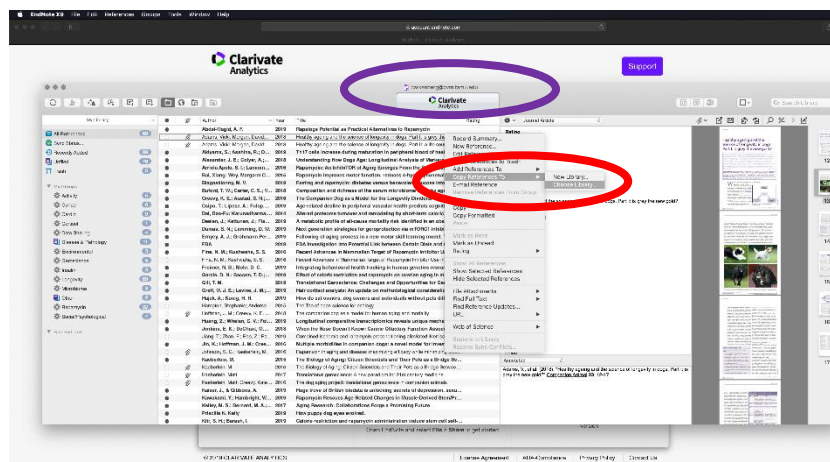
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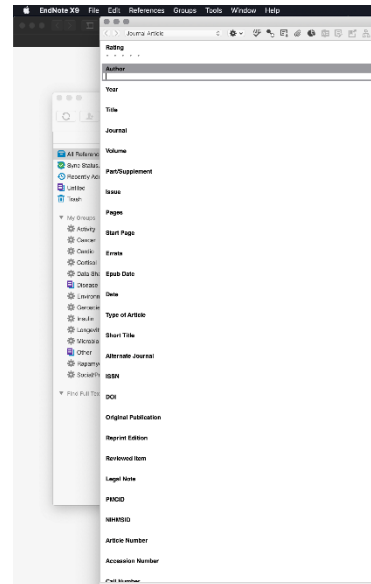
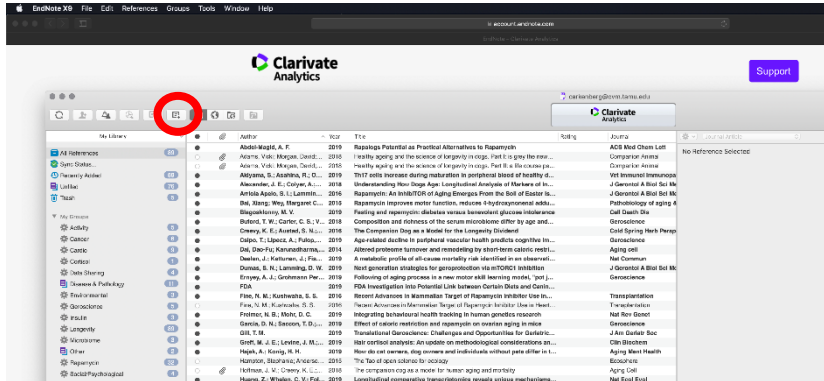
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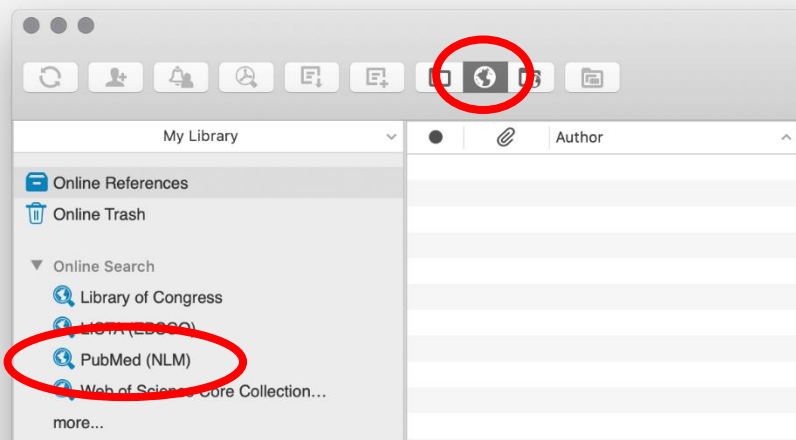
- Click on the  symbol, or click References > New Reference to insert a reference manually.
- You can select the type of reference from the drop-down menu at the top of the new window.
- Complete as much of the information as you can.



Online Search

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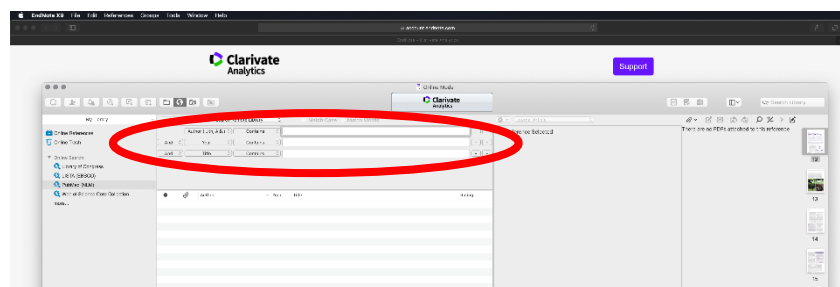
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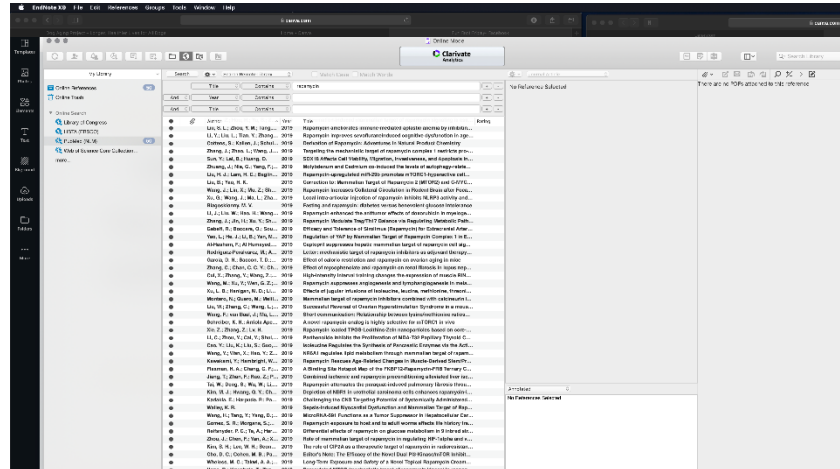
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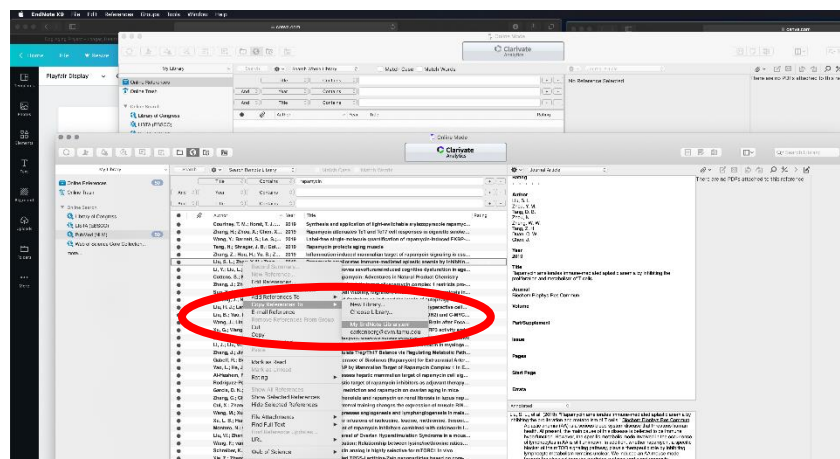
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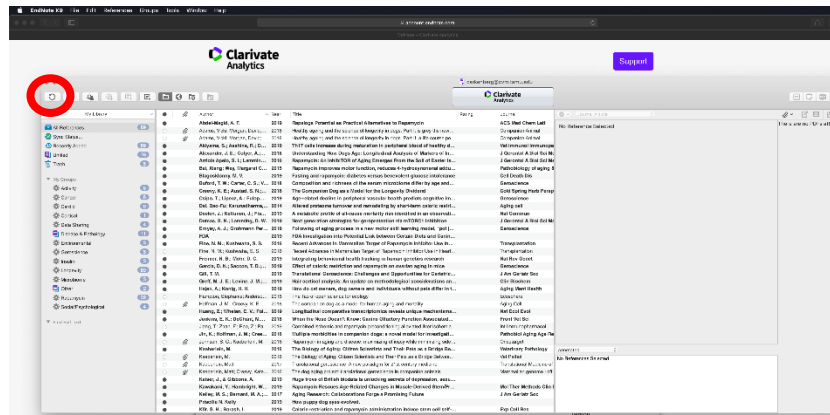
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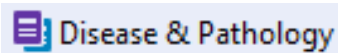


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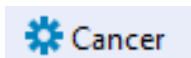
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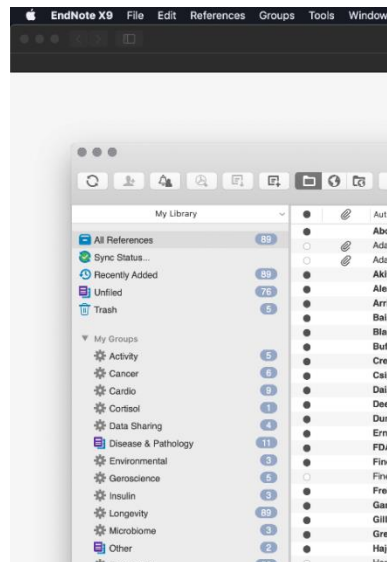


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Appendix I

Groups: We are currently using mostly Smart Groups over Groups, as it should cut down on the need to manually sort/move references. It will also make it easier to include references in more than one group.

Importing entire library: If you would like to import your entire library, this is an option but please consult with the library administrator. There are specific steps, and we would like to avoid having everyone do this at once to minimize the likelihood of data issues during syncing and to allow for the removal of duplicate references.

Duplicates: Endnote does have a duplicate locator, but it must be run manually. A user will not be notified if they are adding a duplicate reference. When the duplicate locator notes a duplicate reference, both references must be reviewed to determine which to keep. The citations frequently contain slightly different information which must be manually updated or transferred. The duplicate locator will be run at regular intervals by the shared library administrator.

Video Demo: For a short, informative demo, check out:

<https://www.youtube.com/watch?v=z2WhHJBQeFc>

