

# Tweaking EndNote

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## Introduction

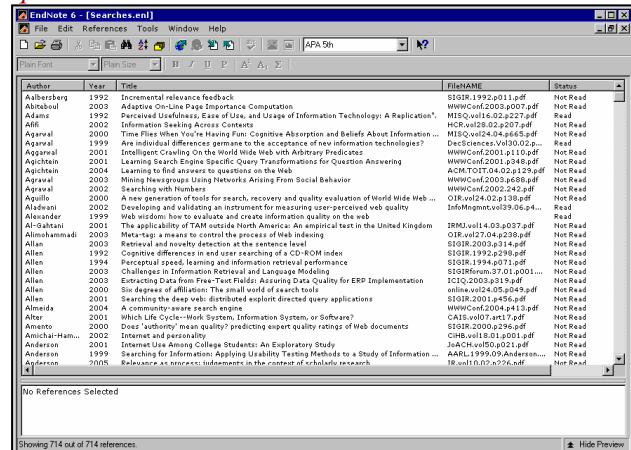
You're about to find out some of the qualities that make me unbelievably nerdy!! But here are some ideas how to tweak EndNote so that it works as a really effective (and searchable) database record of your references. Bear in mind, all that I have put in this document relates to the EndNote version 6, as I was using 6 when I compiled this document. Version 9 (which I use now) is not that different, but I get to \*link\* to any PDF's of the references in the database. Secondly, this is just my way of using the program.

Please feel free to distribute this document to any post-grad student or academic who may find it useful... then they too can read the following shameless plug for my research into how academics/researchers retrieve information on the World-wide Web.

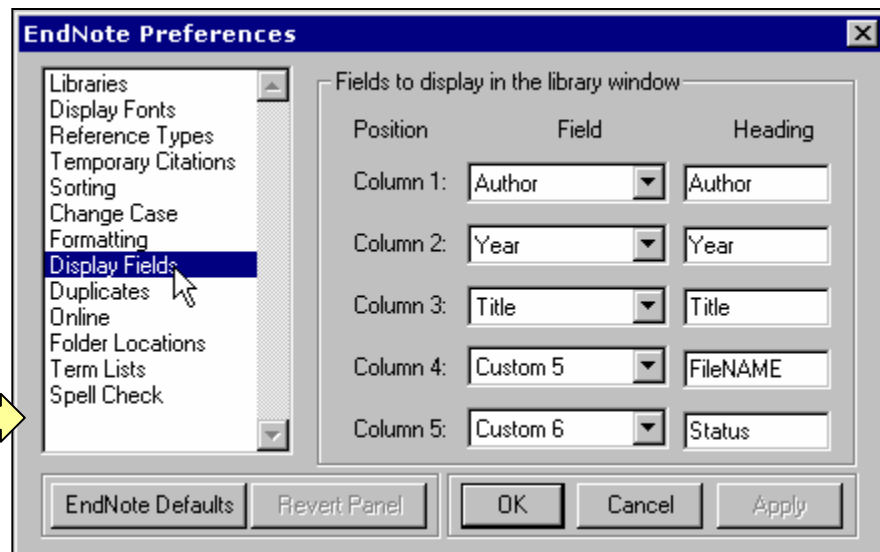
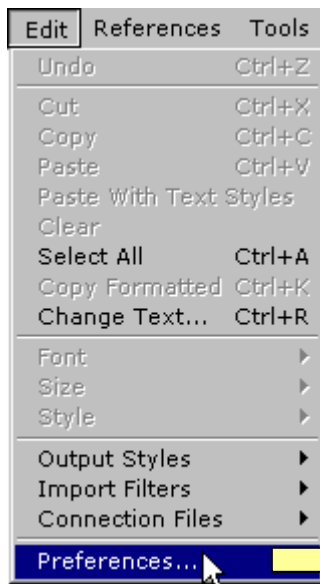
↳ **<PLUG>** if you are an **academic, academic researcher, or post-graduate student, please register at [www.informationquality.com](http://www.informationquality.com) to do four on-line survey/questionnaires. Thanks </PLUG>**

## 1. Default Display:

- ↳ Endnote lets me display 5 fields by default when I open the program. The fields I choose to display are;
  - » **Author** ~ displays the first author name of paper
  - » **Year**
  - » **Title**
  - » **FileNAME** ~ the name I give the document I've read (or reading)
    - NOTE: files are methodically named when I first download or scan them ([see section 4](#)).
  - » **Status** ~ whether I have **Read**; **Not Read**; **Currently Reading**; *etc*



- ↳ I choose the default display by doing the following;
  - » Go to the **Edit** menu, and select **Preferences**
  - » In the EndNote Preferences, select **"Display Fields"**, and chose which five you want to display by default.



» NOTE: **FileNAME** & **Status** are "custom" fields that I created myself.

## 2. Creating Custom Fields:

↳ When inside an EndNote document, you can add new reference by clicking **Ctrl +N** ~ this will cause a window like the one on the right to open.

↳ I have tweaked the window, so that the usual fields are available to me; eg ~ **Author, Title, Year, Journal, Volume, Issue, Pages etc....** But I have also added some fields (and removed the plethora of fields I will never use) so that I choose what kinds of details to include for each reference that I add into the database

» The fields I use include:

→ **Status** ~ *what stage of reading (or maybe I still need to download it etc)*

→ **Notes** ~ *basic summary of the reference's content*

→ **URL** ~ *if it is available on the WWW, I put in the URL*

→ **Keywords** ~ *I use the keywords from the actual reference (also I will include my own keywords)*

→ **Research Area\*** ~ *I define myself what area of research I perceive the reference is from. References can fall into more than one key area of research.*

→ **PaperREF\*** ~ *if I use the reference in one of my own papers, I put the filename of my paper here*

→ **PhD Chapter\*** ~ *which chapter of my PhD the reference is cited in*

→ **FileNAME\*** ~ *the name of the file (so I can easily search for it).*

*\*note: "custom" created fields that help me electronically organise my PhD references*

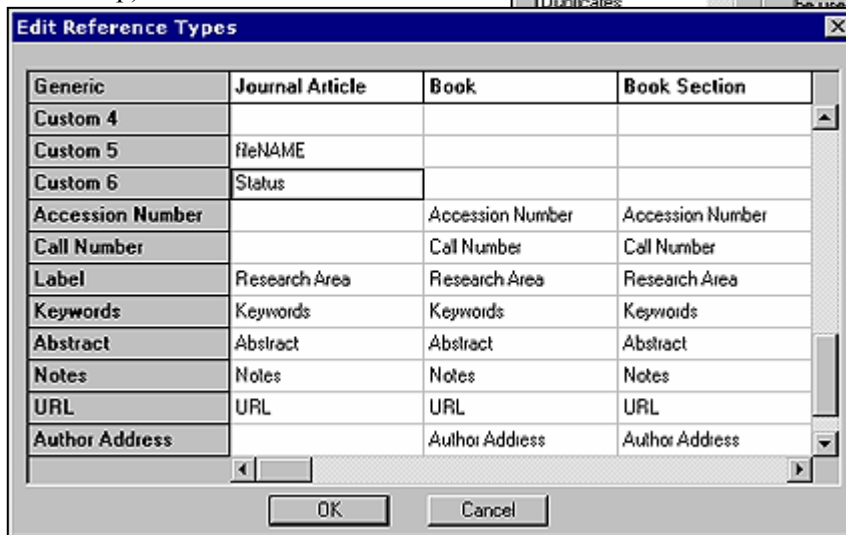
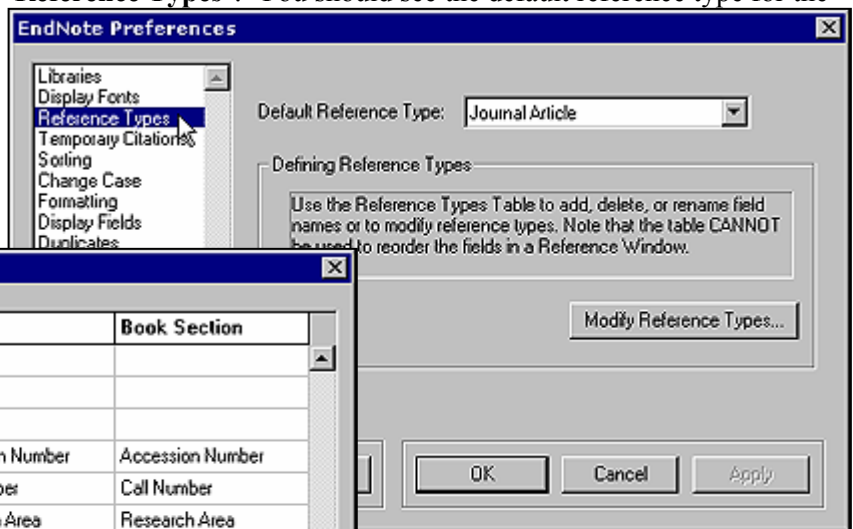
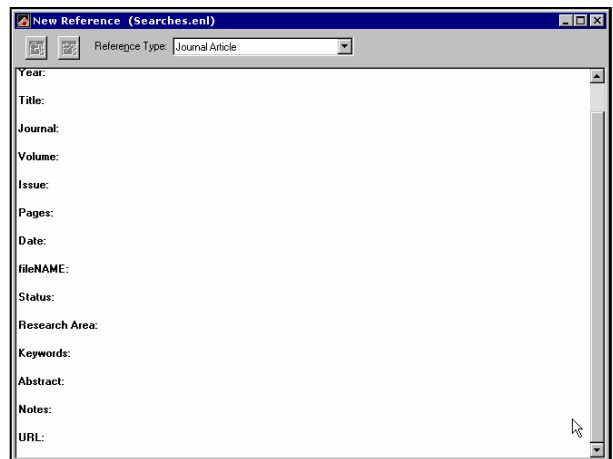
» I have started experimenting with data relating to whether the papers I've read cross reference each other. I can't wait until a version of EndNote allows me to add countless "custom" fields, and more than 5 default display columns.

↳ So, *HOW* is it done?.....

» Go to the **Edit** menu, and select **Preferences**

» In the EndNote Preferences, select "**Reference Types**". You should see the default reference type for the program. You can change this of course.... but I like Journal Article as my default.

» Click on **Modify Reference Type** ~ this will open a window of the reference types (along the top) and



» You can remove fields you don't want showing within the particular reference type, and add up to 6 "custom" fields. These are the fields that will display at **Ctrl+N**

» You can also rename fields that already exist... just make sure you rename them in every column of the reference types you use. For example, I renamed "**Label**" to "**Research Area**".

### 3. The benefits of tweaking the EndNote database:

↳ The biggest benefit for me relates to the search interface. The extra fields I put in can be searched by the Search feature that comes with EndNote. So now I am searching according to added fields I put in. So even if I build quite extensive notes into my notes field... I can search these... **magic!**

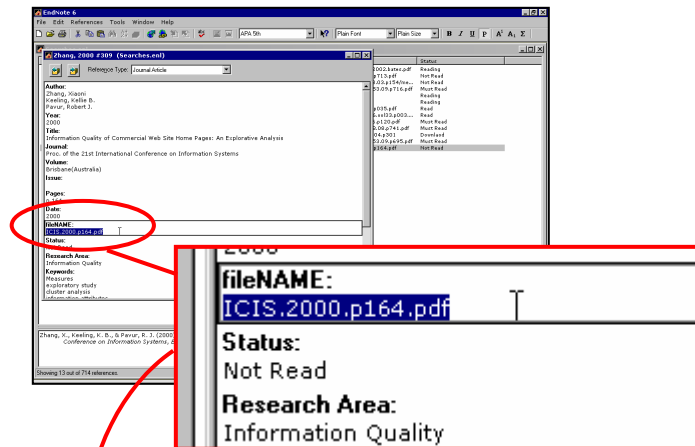
↳ The second biggest benefit relates to the **fileName** field. I also use Google Desktop. I have this setup so that the files on my local computer do not send data to google, they just work as a "crawler" on my PC, classifying and caching the files/data on my laptop. You need at least 500 to 600mb of space for this software, as the cache it builds can end up being quite large.

» When I see a reference in Endnote, and I decide I want to glance through the publication again... I look at the **fileName** field. I copy it and put it into the search field of my Google Desktop

» It is then simply a matter of clicking on the link in Google desktop (which is operating in my browser) and I can open the PDF, or the Word notes version of file, or any other text-based file that makes a reference to the fileName keyword.

↳ Some other "desktop search" software that may be useful include:

- » Copernic Desktop Search (<http://www.copernic.com>) ~ [download from SNAP]
- » Google Desktop (<http://desktop.google.com>) ~ [download from SNAP]
- » X1 Enterprise Client (<http://www.x1.com>) ~ [download from SNAP]



### 4. A quick note about naming files:

↳ The way I name any downloaded papers is fairly straight forward.

↳ Lets say I download the following article:

» Venkatesh, V., & Davis, F. D. (2000). A Theoretical Extension of the Technology Acceptance Model: Four Longitudinal Field Studies. *Management Science*, 46(2), pp.186 -204.

» The filename for this document would be: (colour coded to match reference just for clarity)

→ **MngmntSci.vol46.02.p186.pdf**

~ if you prefer underscores to dots... then it would be

**MngmntSci\_vol46\_02\_p186.pdf**

↳ Conference papers are named accordingly

» Spink, A., & Wilson, T. D. (1999). Toward a theoretical Framework for Information Retrieval (IR) evaluation in an Information Seeking Context. *Proc. of MIRA'99*, pp.9-17.

→ **MIRA.1999.p009.pdf**

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