PDF HANDLING PREFERENCES IN ENDNOTE

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EndNote allows you to set up preferences for handling PDF files in your library.
You can choose to set either one or both preferences. They don't have to be set at the same time. The two available functions are:
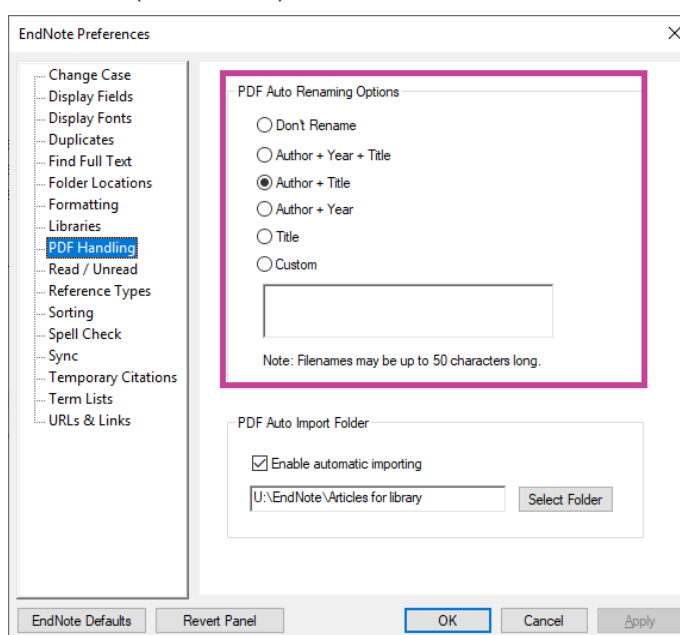
- **PDF Auto Renaming**
  PDFs that are imported from Databases and Google Scholar often have file names that bear no relation to the article, e.g. Content Server(2).pdf or download.pdf. You can tell EndNote to rename the copies that you attach to your records so that they are identifiable.

- **PDF Auto Import Folder**
  You can set up a folder and set EndNote to automatically attach any PDF you add to that folder to a record in your Library. If it has a DOI, it will also populate the record with the reference details.

These functions work best for resources that have a DOI (Digital Object Identifier). If the article doesn't have a DOI, EndNote will still import it, but you'll need to do a bit more work to get the record populated.

Set up PDF Auto Renaming

1. Open EndNote.

2. Open the Edit menu in the toolbar and select Preferences (Windows users).
   Go to the EndNote tab and select Preferences (Mac users).

3. In the Preferences menu, select PDF Handling.

4. Select the PDF Auto Renaming Option that suits you.
   - Don't rename = The file attachment will have whatever random name it was downloaded with.
   - Author + Year + Title = The lead author's surname, the year of publication and as much of the title as will fit within the character limit for the file name.
   - Author + Title = The lead author's surname and as much of the title as will fit within the character limit for the file name.
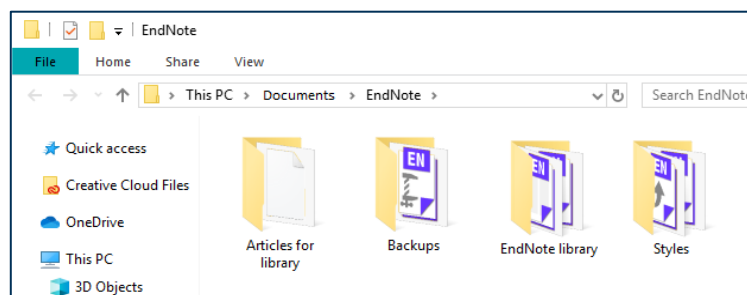
- Author + Year = The lead author's surname and the year of publication
- Title = The title – up to 46 characters.
- Custom = you can choose up to 3 EndNote record fields to include in the file name.

5. Click Apply, then OK (Windows users).
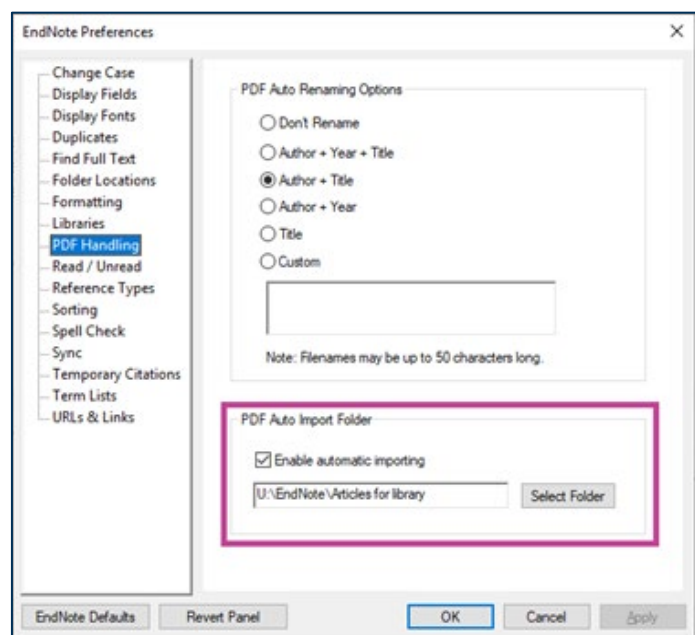Click Save (Mac users)

Set up PDF Auto Import Folder

This folder needs to be fairly close to the surface, e.g. Documents\EndNote\Articles for library. If the full name of the pdf including the file path is more than 248 characters long (including spaces) the pdf will not open.

1. Start by creating an empty folder with a short name that makes sense to you when you see it.
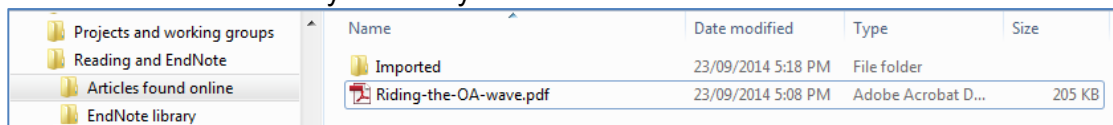

2. Open EndNote.

3. Open the Edit menu in the toolbar and select Preferences (Windows users).
Go to the EndNote tab and select Preferences (Mac users).

4. Select PDF Handling.

5. Tick the box for Enable automatic importing

6. Click Select folder and navigate to the new folder you created.

7. Click on it to add its file path to the box. This tells EndNote to use that folder for automatically importing PDFs.

8. Click Apply, then OK (Windows).
Click Save (Mac)

Use PDF handling

1. Search for articles in Library Search or the databases.

2. Download the PDF files you want and save them to the new Auto Import folder you created.

3. Open EndNote and it should automatically start to import the articles. (If EndNote was already open, but the articles are not importing, close EndNote and re-open it to start the process.)

4. EndNote creates an Imported folder inside the Auto Import folder and moves the articles into it as it adds them to your library.
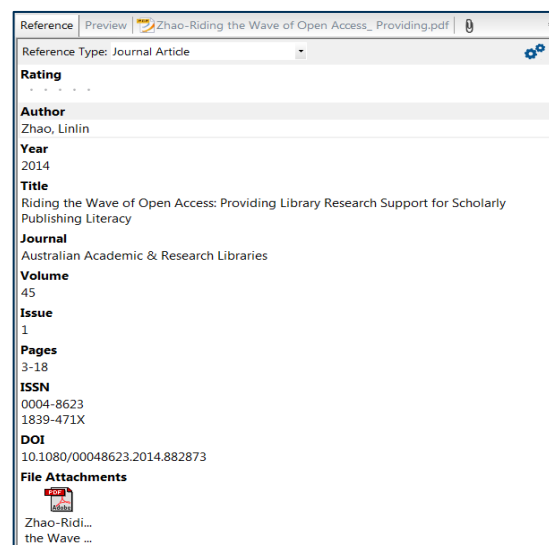

5. At the same time, a list of these imported references will appear in your EndNote library.

    If there is a DOI, the details of the article will populate the fields and you'll have a full reference with PDF attached.

6. Double-check the details for the fields that display in the reference. Sometimes the automatically populated records have missing data, or data entered in the wrong field.

7. Edit as needed.
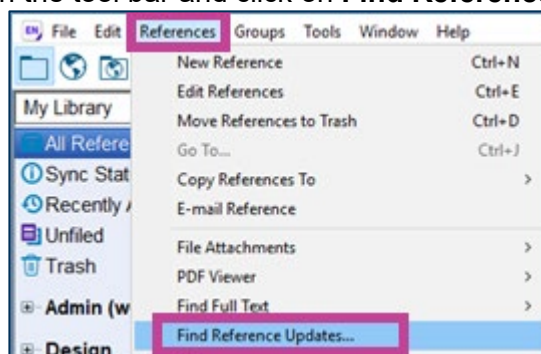
8. Save the record and close it.

The file is attached, but the record is empty:

Articles that don't have a DOI will have a title that appears as the name of the PDF in pointy brackets, e.g. <Library-research-support.pdf>. For these, there is a little more work to do.

1. Open the reference.

2. Click on **Layout** in the bottom right corner of the Reference window. Select Right so the PDF Panel displays beside the record. This allows you to copy details across to the fields in the record for the article.

3. Copy the author and title information from the PDF to those fields of the record. **Save** and close the reference.

4. Go to **Reference** in the tool bar and click on **Find Reference Updates**.

5. If EndNote can find the details, it will populate the reference as it did for the article with the DOI.

6. If it was successful, double check the fields that display in the reference.

7. Edit as needed.

8. Save and close the completed record.

There's still no record:

If EndNote can't automatically populate the record for you, you'll have to add the details in manually.

1. Open the reference again.

2. Type in the missing data, or copy and paste details from the PDF into the fields of the record.

3. **Save** and close the reference.

NOTES:

Every file you attach to EndNote (either manually or with the automatic import) is then put into the Library's .Data folder. If you delete this .Data folder or move it to a different location from the library, EndNote won't be able to find the file to open it. It's best to leave this folder alone.

If you are manually renaming files, use only letters and numbers for the file names. Sometimes other characters, e.g. hyphens and underscores can cause problems with PDFs in EndNote