ATTACHING AND IMPORTING PDFs/OTHER FILES

OVERVIEW

Many different file types can be attached to EndNote references, whether this is a PDF file of the full article, an image or table to reference or a Word document. The process for attaching files is the same. You can search the full-text of attached PDFs from within EndNote using the Quick Search box or by limiting your search to PDFs.

If you want to use the Insert Figure feature in Word using Cite While You Right, you will need to use the Attach Figure option in EndNote.

EndNote will allow you to attach a variety of file types including:

- Audio files (wav, mp3)
- Microsoft Access, Excel, PowerPoint and Word files
- Microsoft Project files, Microsoft Visio files
- Multimedia files (mov, QuickTime)
- PDF files (Portable Document Format)
- Technical Drawing files (AutoCAD)
- Text files (txt, rtf, HTML)

ATTACHING A PDF OR OTHER FILE

Please note: this task requires that you have PDFs or other files on your own file space ready to upload.

STEP 1

Open the record to which you want to attach the file (double-click the reference).

Click on References > File attachments > Attach file.
STEP 2

In the ‘Select a file to link to the reference’ window, navigate in your file space and click on the appropriate PDF file.

Click Open or drag and drop the file.

Close the reference.

Note that a paperclip icon has appeared next to the reference in your library.

Double-click on the reference to open it again and scroll down to see where the PDF has been saved.

You can attach images and other files in the same way.

You can also attach a PDF to an existing reference using EndNote’s Find Full Text feature. Please see the Find Full Text handout.

IMPORTING PDFs AND GENERATING REFERENCES AUTOMATICALLY

STEP 3

EndNote can import full-text PDFs from a designated folder on your H drive and automatically generate references for them in your library. This feature allows you to populate your EndNote library quickly and easily as you find your sources, by simply saving the PDFs in your designated folder.

Please note this feature is dependent on each PDF including full DOI information.

To set up your PDF handling preferences:

- Click Edit > Preferences > PDF Handling
- Choose the PDF renaming option you require and select a folder from which you wish PDFs to be imported in future
- Tick the Enable automatic importing box and click on Apply > OK

EndNote will automatically scan this folder for PDFs every 15 minutes or on reopening of your library and generate references (with the PDF attached) for you. EndNote will automatically move scanned PDFs to an Imported folder within your designated folder to avoid duplication.
IMPORTING A SINGLE FOLDER OF PDFs

STEP 4

If you do not wish to set up automatic importing of PDFs but instead import a single folder, this is still possible within EndNote.

- Go to File > Import > Folder
- Use the Choose button to navigate to the appropriate folder and click on OK
- Ensure the Import Option is set to PDF and click on Import

If you have a large number of PDFs the import process may take some time. Please note this feature is dependent on each PDF including full DOI information; it will not work with all PDFs.

Where the process has been successful you will see your PDFs attached to automatically-generated references. Where the process hasn’t worked (as in the top reference pictured below) your PDF will be attached to an empty record. You will need to double-click to open this record and type in the details manually.

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