ENDNOTE CTS DOCUMENTATION:
ENDNOTE ONLINE 3.11

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Version: 1.0
Date of issue : March 2015
RELEASE DATES

EndNote online 3.11: 10:00 AM to 12:00 PM EST, March 10, 2015

ENDNOTE ONLINE 3.11 FEATURES

1. DELIVERY OF 3.11

The 3.11 environment will be pushed to production on March 10, 2015 during the hours of 10:00 AM to 12:00 PM EST and will override the current production version (3.10). Users are not required to take any action. Once the 3.11 release is loaded into production each and every user, after signing in, will be directed to the 3.11 version of EndNote online.

2. USER INTERFACE CHANGES

NEW GLOBAL HEADER

The global header was introduced into the EndNote online environment in the 3.11 release in order to provide a consistent “look and feel” with other existing Thomson Reuters properties such as Web of Science and InCites. The header itself serves as the immediate focal point to the user upon sign-in and having EndNote online display this shared focal point brings the environment under the TR umbrella in a visible and direct way.

UPDATED COLOR SCHEME

In addition to the newly introduced global header, the online environment was updated to reflect the current Thomson Reuters color scheme choices found throughout the various products. More specifically, the legacy EndNote online colors such as red and white were replaced with the modern Thomson Reuters branding colors of grey, orange, and blue. Similar color schemes can be found on Web of Science and InCites. Much like the global header, the intent of the updated color scheme was to provide a consistent “look and feel” to our user base, specifically those with cross-product workflows.

Buttons and actionable links have been turned blue. Changes to the site include text and images composed largely of a grey/orange theme.
INTRODUCTION OF CSS TECHNOLOGY

In EndNote online 3.10 and earlier the buttons throughout the site were images. The 3.11 release updates this feature by replacing the buttons with CSS buttons - a modern web technology whose benefits include improved scalability and improved load times.

Switching to CSS brings a new, modern technology into the EndNote online environment. This is a key technical win for the development team.

The user interface maintains the same operational and workflow experience.
3. MANUSCRIPT MATCHER

Users are now able to search for suggested journal for manuscript submission directly within the EndNote online library utilizing the new “Match” tab which houses the manuscript matching feature. This means that with their Title, Abstract and Citations (in the form of online groups) the user can perform a search, review value-add information surrounding their suggested journals and, if desired, link out to the relevant webpage to begin the manuscript submission process.

This functionality is the first of many releases to the EndNote product line to help our users with collaborative workflows. Library sharing should be recommended to users as an alternative to saving their library on a shared drive, or emailing a compressed copy around to their collaborators. It will provide their entire team with immediate real time access to the same set of references, attachments, notes and annotations. Changes are sent and received via sync, so all members of the shared library need to have updated to X7.2, the desktop activated with sync preferences completed, and a working internet connection in order to send and receive changes.

Steps:

1) Performing a search:

User clicks on the ‘Match’ tab within EndNote online and is directed to the beginning step where (s)he enters Title, Abstract, and Citations and submits this data to be analysed by the manuscript matcher algorithm.
On the right-hand side of the search page a “How It Works” section features a brief overview of the manuscript matching feature and its intended function. Users unfamiliar with Journal Citation Reports (JCR) have the ability to link out to a JCR informational page to learn more about this Thomson Reuters product. Further, for those looking to dig deeper into manuscript matcher a link is presented that will direct the user to the manuscript matcher marketing page.

After the user enters his or her Title/Abstract/Citation combination they click the “Find Journals” button and are directed to the second page of the manuscript matcher feature – referred to informally in this document as the “search result page.”

2) Reviewing Search Results

After entering the search details and clicking ‘Find Journals’, the user will be presented with the Search Results page, as shown to the right →
The search result page contains a significant amount of data and navigational options for the user to be aware of in order to gain the most value from the feature. This data is sourced from the algorithm itself as well as JCR for data points such as the JCR Impact Factor and JCR overlay information – two key value-add features that

A successful search will be defined as when a user is returned a list of 2-10 journal results in their search. In the unlikely event of the algorithm matching zero or one journals to a user's input data, the user is provided with an error message prompting them to revise their input.

Each set of journal results is housed within a tabled structure and will have the following columns of data: Match Score; JCR Impact Factor; Journal; Similar Articles. To the right of this table, each journal result contains actionable CSS buttons for journal feedback, manuscript submission (The “Submit” button) and journal homepage (The “Journal Information” button).

**Match Score**
The match score is an algorithm-generated numerical score that is returned for each journal match. By default, the journals are sorted from highest to lowest by match score, but the user is capable of changing the sort order based on any of the table columns. The numerical scores are bucketed into four verbal categories: 0-25 = Fair; 26-50 = Good; 51-75 = Very Good; and 76-100 = Excellent.

**Top Keywords Ranking**
In addition to the columned data, each journal suggestion brings back “Top Keywords” from the algorithmic analysis. The keywords are level-setters for the user by helping them understand the relevant text from their manuscript that helped the algorithm identify a particular journal as a match. It is important to note that the keywords returned by the algorithm are not the same as the WoS keywords – there is no relationship between the two.

**JCR overlay**
For each journal within the manuscript matcher universe that is a part of JCR (approximately 99% of journals), the JCR overlay will be present. The display of the JCR overlay does not depend on a user’s entitlement or JCR subscription status – i.e. all users will see the overlay in its entirety.

**Feedback loop**
The user is presented with the option to provide feedback for each journal suggestion returned by the algorithm. There is no requirement for the user to provide feedback and doing so is completely voluntary. If feedback is provided, the user has the option to leave additional “messages” with their feedback that will be reviewed by the product team when the feature is in production.

**Journal Submission**
The submit button is considered the “goal” of the manuscript matcher process in the sense that the feature exists to provide enough context and value-add information for the user to be comfortable making a submit/no submit decision for the set of journals provided. Each and every other piece of functionality within manuscript matcher is designed to help the user make this decision.

When the user has made a “submit” decision the user will click the appropriate button and be taken to a link to help them begin the submission process. The landing page of this link is journal specific.
3) Learning more about similar articles

From the search results page, the user has the option of retrieving additional value-add information on articles from suggested journals that the algorithm identified as “similar.” Each journal can have 0 to 10 similar articles. The articles are formatted as shown to the left →

The similar articles page exists for the sole purpose of providing additional value-add information to the user – information that comes directly from the manuscript matcher algorithm and is supplemented by Web of Science while integrating with existing EndNote functionality via the capability of saving these references to a user’s online library.

Save to EndNote online library
For each similar article identified by the algorithm, the user has the ability to select individually, or to select the entire ‘similar article’ grouping and save these articles to his or her online library. When the user successfully saves these articles to the group of references he or she is provided a message indicating a successful save.

Full Text from Publisher
The full text from publisher capability is an entitlement-driven capability that, depending on the user’s credentials, allows him or her the ability to link out to view the article in full text. This service is not offered to each and every user and is based on the user’s own rights to view this material. If the user is not entitled to view an article’s full text then he or she will be provided with an appropriate error message directing them to contact their university.

View in Web of Science
Entitled Web of Science users who are using the manuscript matcher feature have the ability to link out directly to the Web of Science from the feature in order to view a “similar article” Web of Science record. Unentitled users, instead of being shown an error message, will be able to access the same Web of Science record through the use of CEL records. This will provide the user a static page of the WoS record for similar articles.
3.11 UPDATES

1. UPDATED LOGIN PAGE

The login page has been updated with the text to the right to include a reference to the new manuscript matcher functionality →

2. UPDATED GETTING STARTED GUIDE

The Getting Started Guide has been updated with the text to the right to include a reference to the new manuscript matcher functionality →
## REQUIREMENTS

### Browser Support for Web Application*
- Microsoft® Internet Explorer® 8.x or later
- Firefox® 27 or later
- Safari® 5.0 or later
- Chrome 31 or later

### Browser Support for Web Capture**
- **Add-on***
  - Microsoft® Internet Explorer® 8.x (32-bit) or later
  - Firefox® 27 or later
- **Bookmarklet***
  - Microsoft® Internet Explorer® 8.x (32-bit) or later
  - Firefox® 27 or later
  - Safari® 5.0 or later
  - Chrome 31 or later

### Word Processor Support for CWYW
- **Windows**
  - Microsoft® Windows® XP SP3 or later / Windows Vista / Windows 7 / Windows 8
  - Microsoft® Word 2007 / 2010 (32 or 64 bit) / 2013 (32 or 64 bit)
- **Macintosh**
  - Macintosh® OS X 10.6 or later
  - Microsoft® Word 2008 SP1 / 2011

*Macintosh and Windows except Internet Explorer which is Windows only

**Cookies and JavaScript must be enabled

## TRAINING

For all of the latest videos, please visit the EndNote Training YouTube channel: [http://www.youtube.com/user/EndNoteTraining](http://www.youtube.com/user/EndNoteTraining)

or

[http://endnote.com/training](http://endnote.com/training)

Direct users interested in more information on manuscript matcher to: