Searching the Evidence

Using Endnote advanced features

Contents

To help you use this guide,

Indicates a step in the process of using Endnote

Indicates a tip, or an extra piece of information.

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1. Introduction

This guide follows on from the Endnote guide. It demonstrates how to use more advanced features of Endnote such as deduplication, editing referencing styles, backing up your library and merging libraries. It will be particularly useful if you have a large number of references, a complex piece of work or are collaborating with others.

2. Sorting records

To change the order your records are displayed in click on a column heading, click on the *Author* column to change Author sort from ascending to descending. Click the *Year* column to see references in descending order based on year of publication. Click the *Read/Unread* column to sort with either read or unread items at the top.


3. Finding duplicates

If you are importing references from a number of different sources you may have duplicate references in your library. Endnote can help remove duplicates.

Go to *References* menu and select *Find Duplicates*. If any duplicates are found they will appear side by side so you can select which to keep.
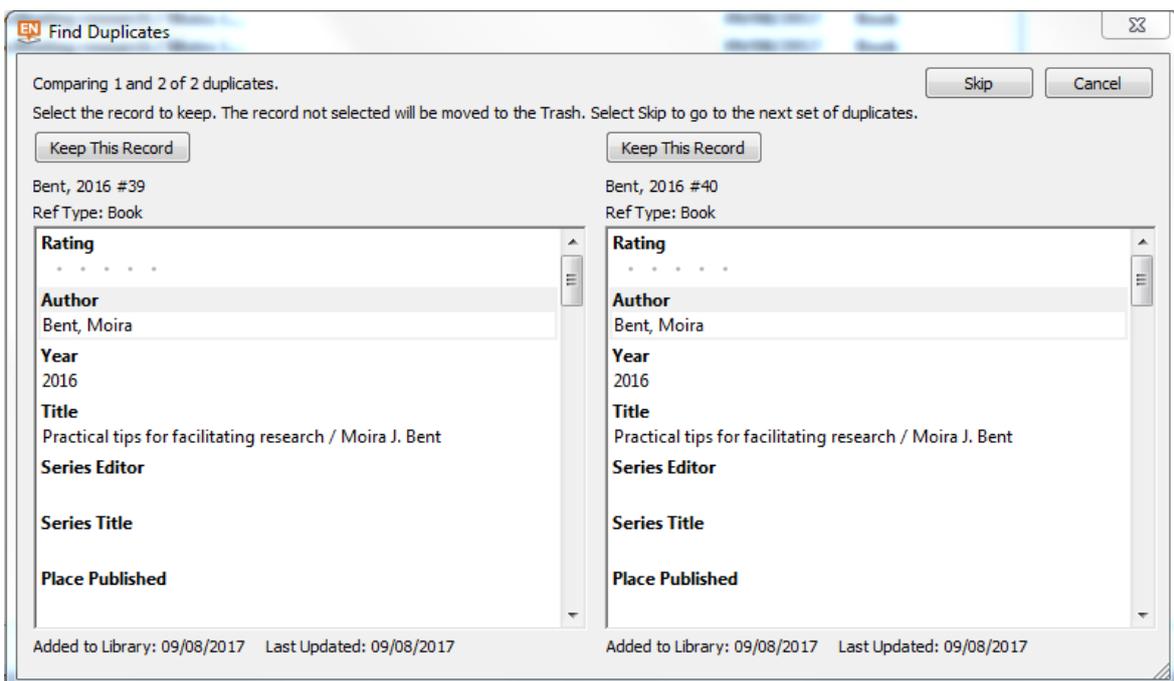
To change how Endnote finds duplicates go to the *Edit* menu and select *Preferences* then *Duplicates* as below. To make sure that most duplicates are found change the fields which are being checked and use different combinations. This is especially useful if you are doing a literature or systematic review.
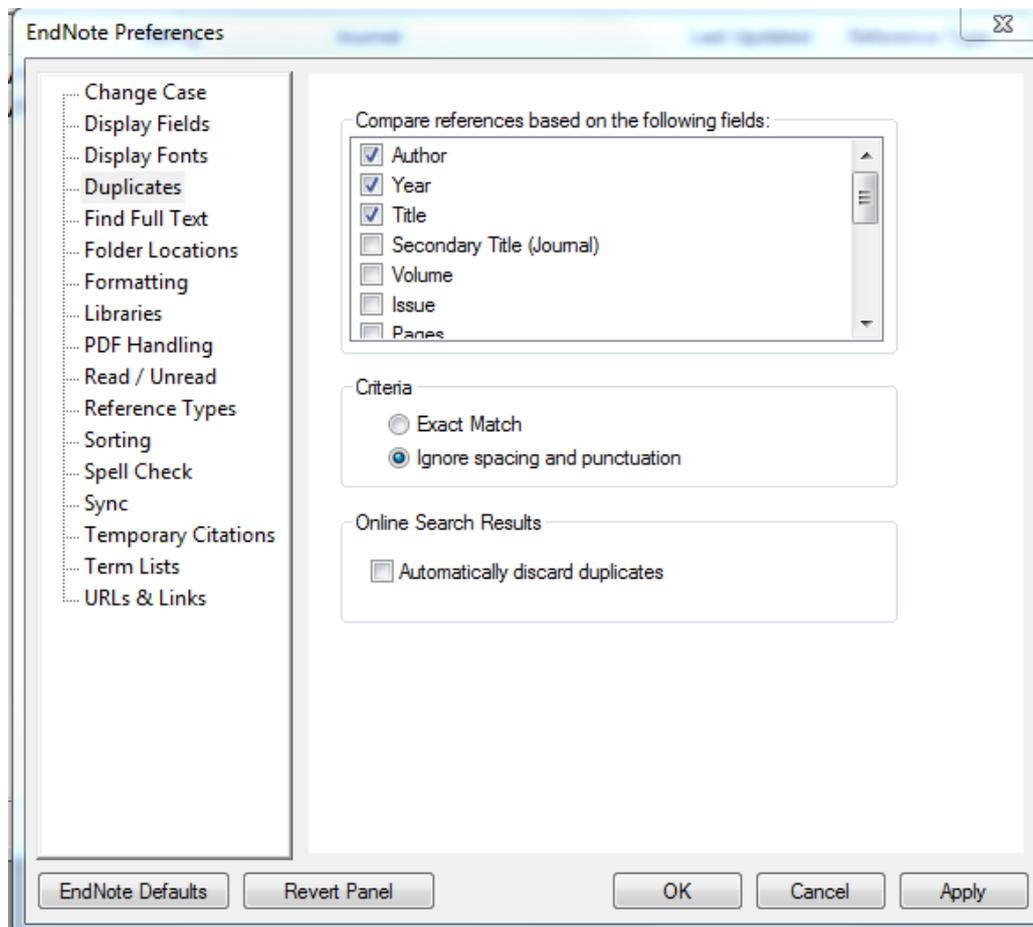
To ensure you are removing all duplicates e.g. for a systematic review start by selecting Author, Year and Title. To remove any false duplicates found hold Ctrl and select the false duplicate. Once you are happy that all are duplicate articles, drag the selected results to the trash. Next select Author and Title and repeat the above process. Next, select Year and Title, then Author, Year and Volume. If you still have duplicates, you can repeat this process with different combinations. Keep all the duplicates in the trash.

4. Adding and editing a referencing style

If the referencing style you require is not there it is possible to add your own or edit an existing style.

In Endnote go to the *Edit* menu - *Output Styles* - *New Style* for a new referencing style or *Open Style Manager* to edit a style.

Once in Style Manager select the style you would like to edit, select *Edit* and the fields you would like to change e.g. *Page Numbers*.

5. Editing citations in Word

If you don't want to edit the style as above in Section 4, it is possible to edit individual references in Word. This can be useful if you want to add page numbers to a reference, e.g. "(Jones 2014, p15) argues …"
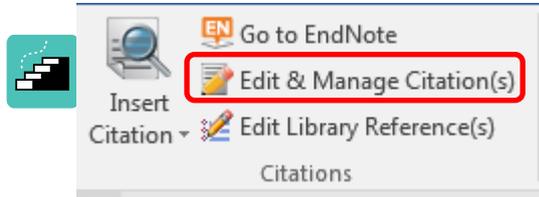
Highlight the citation and select *Edit & Manage Citation(s)* from the *Citations* box in the Endnote tab.
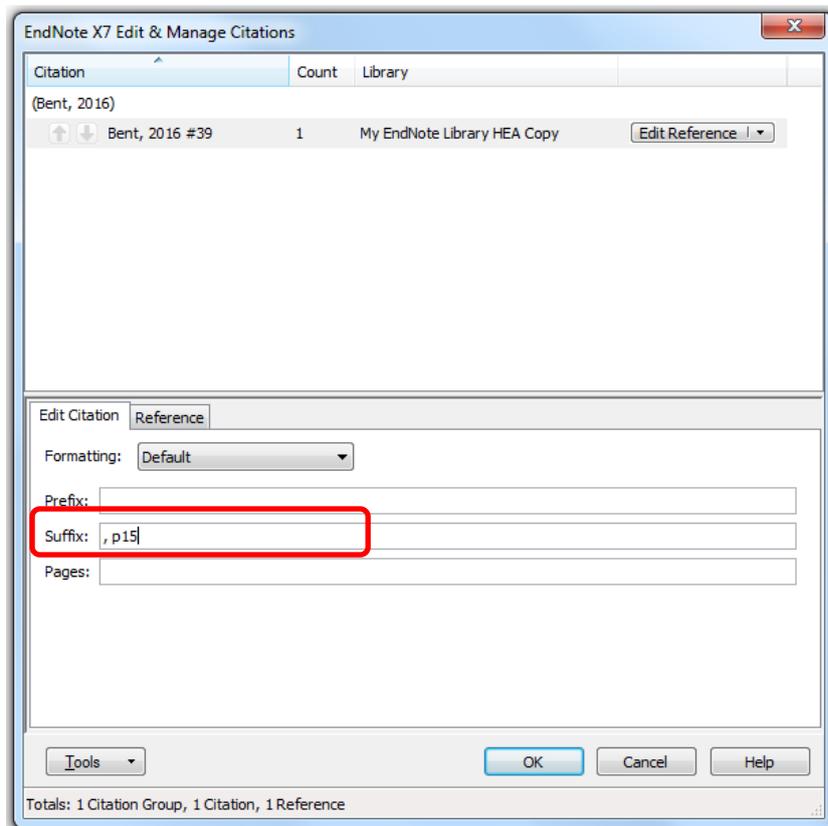
Page numbers are added in the *Suffix* box. You may need to precede the p. with a comma so that there is a gap between the year and page numbers). These changes will be saved even if you *Update Citations and Bibliography*.

6. Inserting citations into PowerPoint

To insert a citation and reference into PowerPoint you need to have installed the plugin that is also used in Word.

Make sure that you have selected the correct style (e.g. Harvard, Vancouver) before inserting a citation or reference.

To insert a citation on a slide in the EndNote tab, click *Insert Citation* and search for the required citation and *Insert*. To insert a reference click *Insert Reference* and search for the required reference.
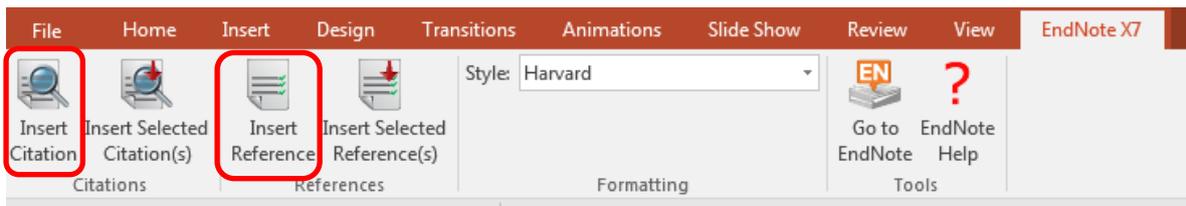
7. Backing up/Creating a copy of your library

As with any other piece of work it is important that you have your Endnote library backed up so that you won't lose your work if your original files are lost or damaged.

The easiest way to back up your library is to save it to another device or portable storage. The files you need to save are
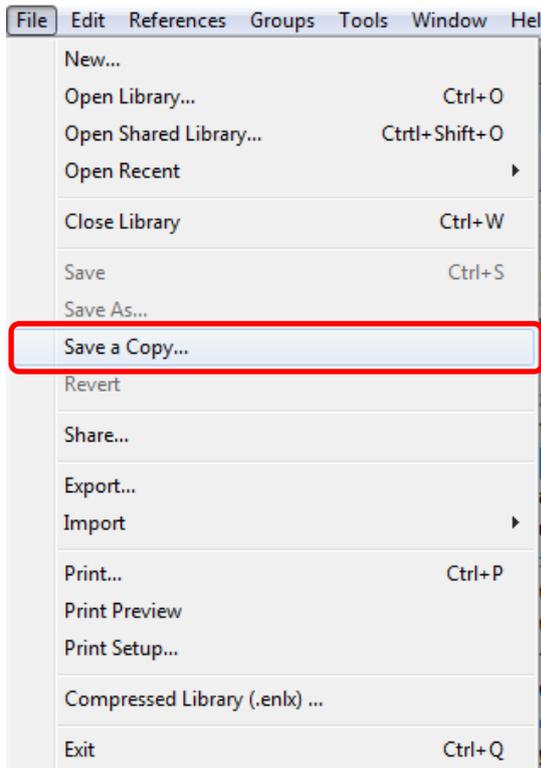
To create a copy of your library go to *File – Save a Copy* and *Save*.

8. Changing text

To change the text of a number of references use the *Find and Replace* function that is on the *Edit* menu.

9. Importing PDF files
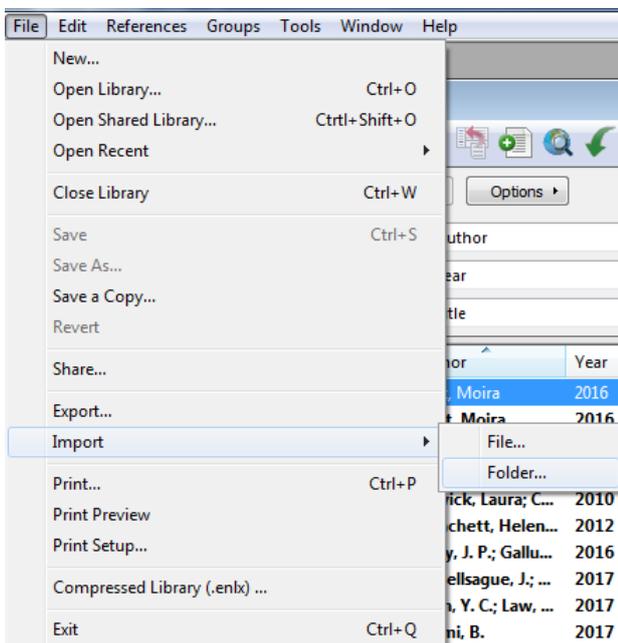
To create a group from a folder of PDF files select *File – Import – Folder…*
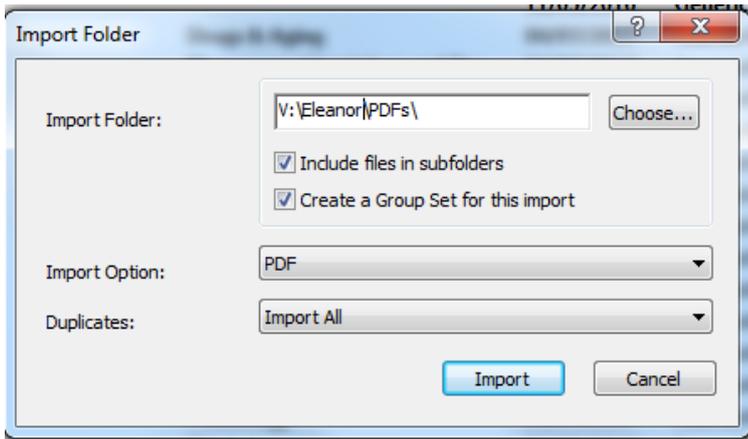
Browse to find the folder you want to import, and tick both options to import all the items from the folder to a new group. The PDFs will appear as a new group.

 Check the references once they are imported as the record may not be as complete as one you have downloaded from a database. If you are importing scanned PDFs there may be a record created but no data in it as Endnote relies of DOIs to source the data and a scanned PDF will not have a DOI.

10.   Document auto group

If you need to check which references you are using in a document you can easily do this by opening the document in Word and your Endnote library.

 In Word in the Endnote tab, click *Update Citations and Bibliography*.
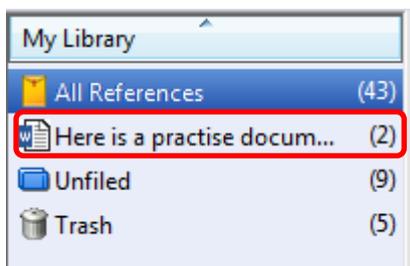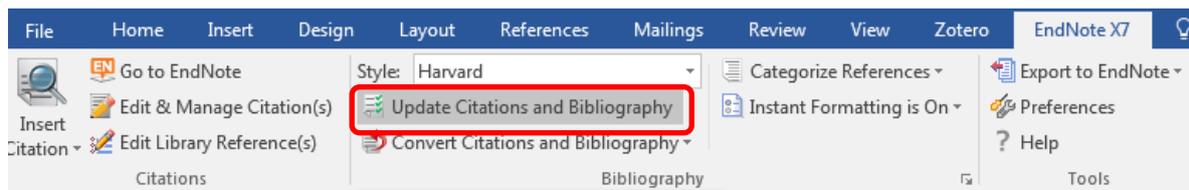
The document auto group will appear in your Endnote library. This group is temporary and will disappear when you close the Word document.

11.   Merging libraries

To merge two Endnote libraries together:

Open the library you want to copy or merge documents into.

Select *File – Import – File*.

Select the Endnote library you wish to merge into your main library and select Endnote library from the list of import options.
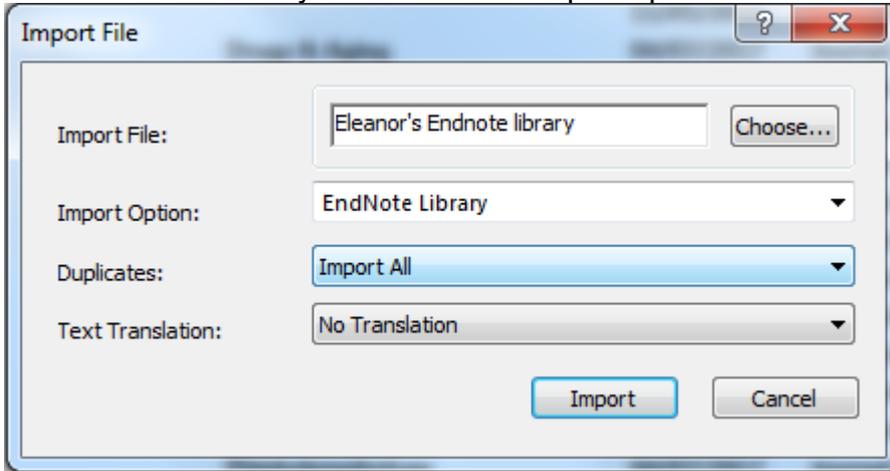
It is possible to *Import All*, *Discard Duplicates*, or *Import into Duplicates Library*. This last option creates a new library for the duplicate records.

You can also copy and paste references from one library to another.

12.　　　Move text with citations

To move text around within a Word document it is possible to cut and paste as usual.

To move text and citations to a different document:
Select the text you want to move to a new document.
In the Endnote tab, click *Convert Citations and Bibliography - Convert to Unformatted Citations*.
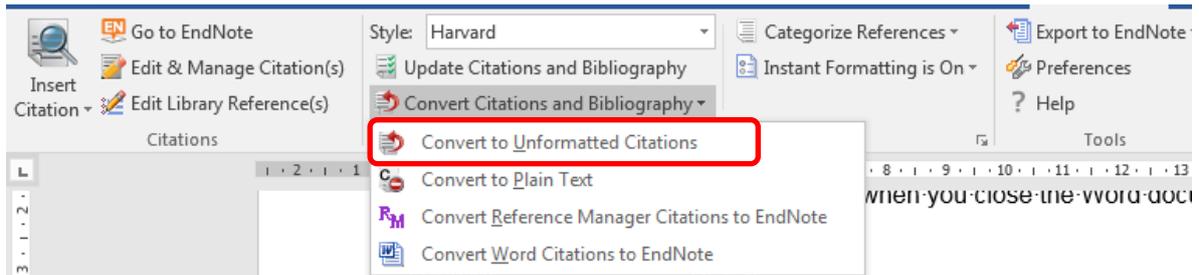
Paste your selected text into your new Word document and click *Update Citations and Bibliography*.
Your citations will be formatted in your new document in the selected style and Endnote will create a bibliography at the end of your document.

13.　　　Storing charts, tables or equations

To create an Endnote reference for tables, charts or equations they must first be saved as images.

To save the reference to Endnote
Select *References – New Reference*
Change the reference type from *Journal article* to *Chart or Table*, *Equation*, or *Figure*.
Add some information to the fields e.g. Title, caption

Click on the Attach Figure button.

Browse to find the correct image and click on the Open button.

14.   Travelling library

When citations are added to a document, a travelling library is created. From these references, it is possible to create a new library or add these references to an existing library.

In Word, in the Endnote Tab select *Export to Endnote - Export Travelling Library*
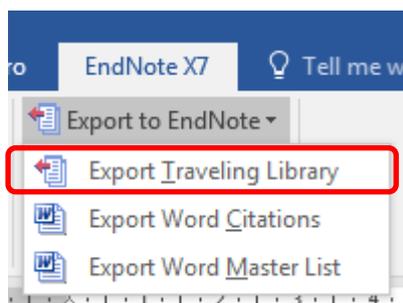
You are given the choice of adding the references to an existing library or creating a new one.
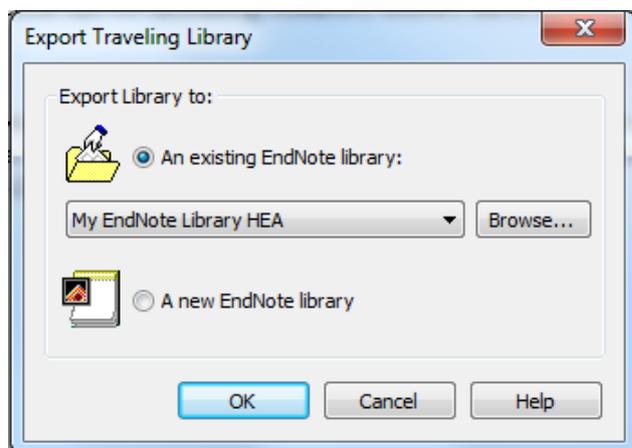
A travelling library is not the same as linking your EndNote web library to Endnote. The travelling library is simply the references from a single Word document. If you want to add references while you are away from your Endnote desktop library, you can find how to do this in our Endnote introductory guide.

15.   Create a bibliography from a group

It is possible to create a bibliography from a group of references.

In Endnote, select the referencing style required. (If the style you require isn't on the list select *Find Another Style* and search for it in the list).
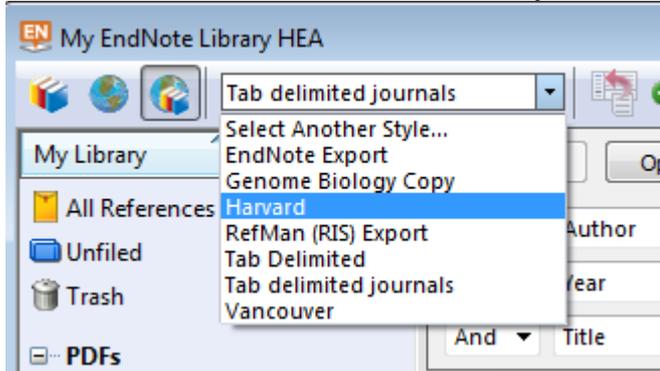
Select the group you want to use. To copy all the references use Ctrl + A to highlight them all or use Ctrl and the left mouse button to select the required references.

Right-click on the selected references and select *Copy Formatted* from the menu.
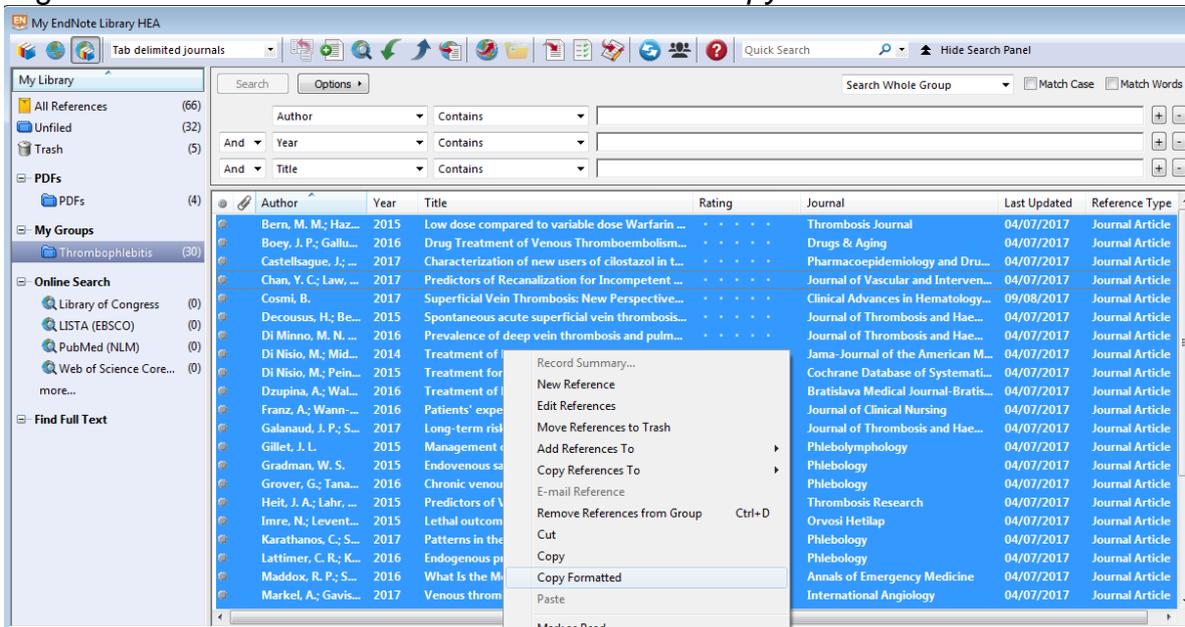
Paste the references into a document.

16.   Custom fields

If you are working on updating a previous piece of work, how do you find items that were included in the earlier version? If you are collaborating on a systematic review with another reviewer how can you see where you agree and disagree?

Using custom fields will help with both these issues.

To edit a custom field go to *Tools - Change/Move/Copy*
This can be done with the records chosen by Reviewer 1 selected in Endnote – they could be placed in their own group.
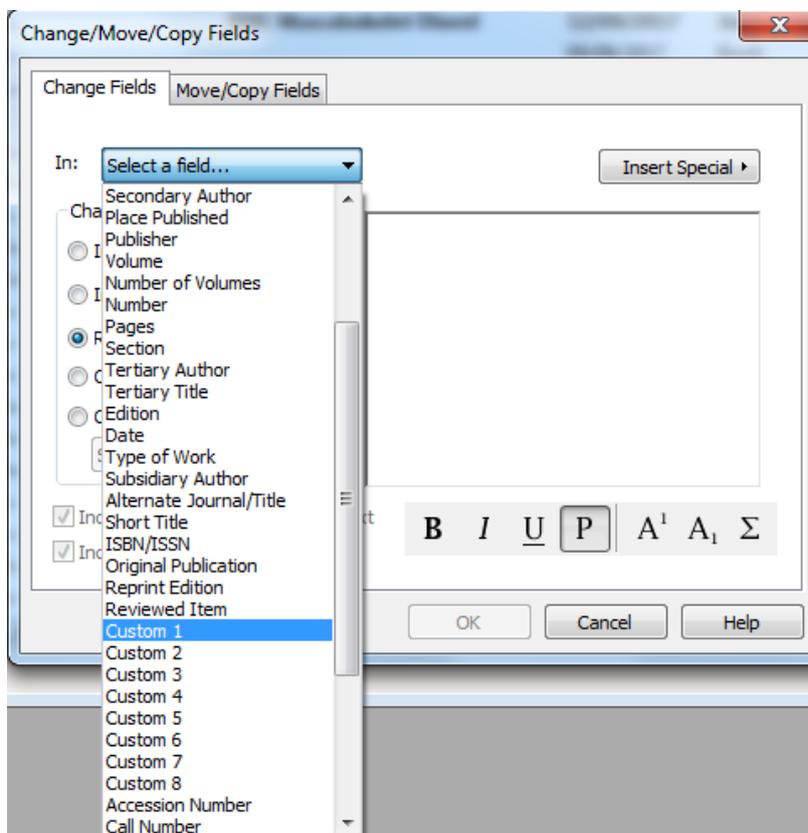
Select the field you want to change e.g. Custom 1.
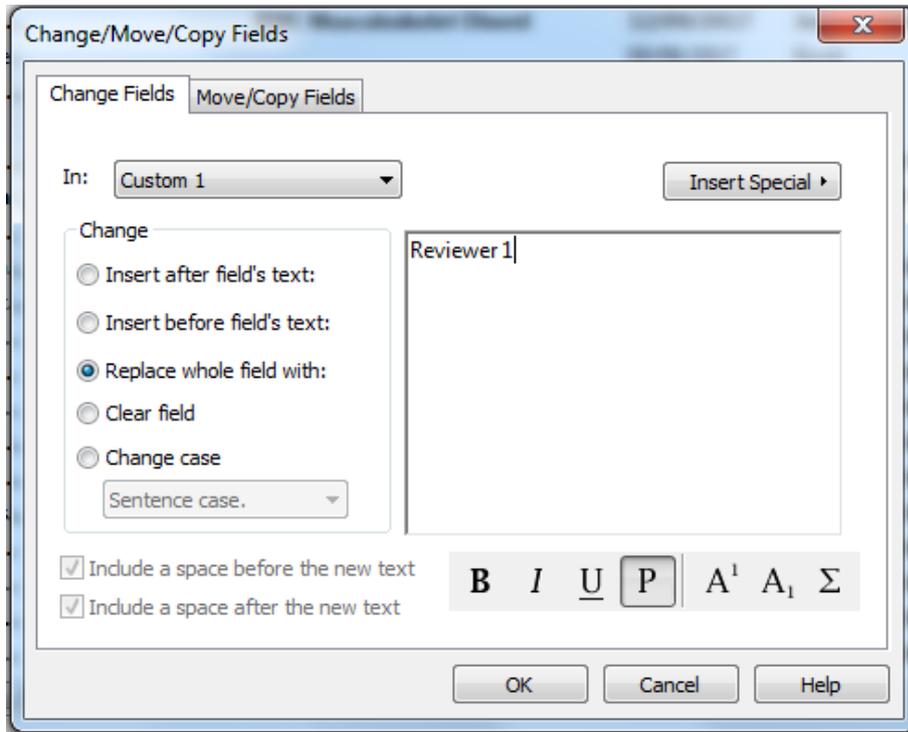
Import the records chosen by Reviewer 2 and place them into their own group. While the records are selected edit Custom 2 as above to Reviewer 2.

Now create a Smart Group "Custom 1 contains Reviewer 1 or Custom 2 contains Reviewer 2"

Now find duplicates as explained in Section 2 on p2. Remove the duplicate and the original and you should just be left with the items chosen by Reviewer 1 or Reviewer 2.

17.   Exporting your Endnote library to another reference manager

Do this if you need to export your library to another reference manager or to send to a colleague.

Highlight the references you want to export. (If you want to export all you can do by selecting *All References*, *Edit – Select All*)

Then *File - Export*.
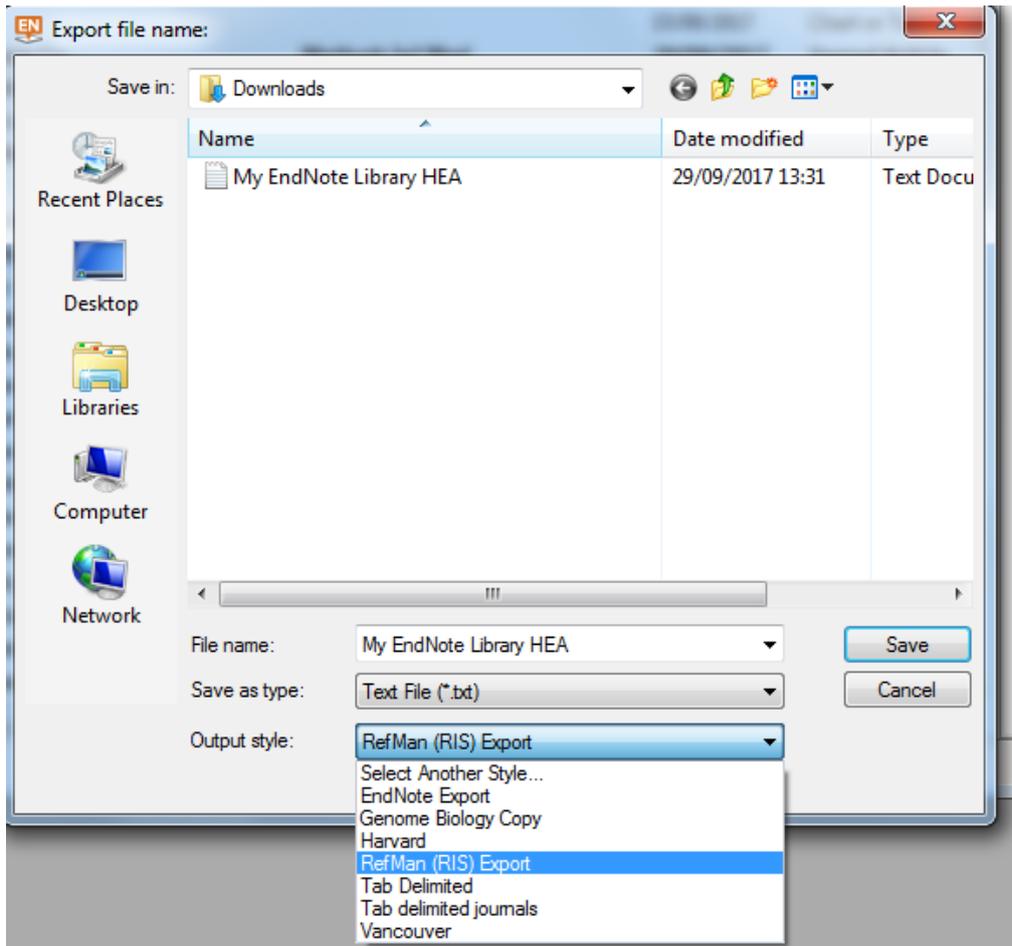
Make sure you choose an output style that is compatible with the place that you are sending them, e.g. RIS for another reference manager. If the style you want isn't there you can *Select Another Style* and choose from the list of options.

## 18.   Exporting References to Excel or Access

Before beginning the export process create a backup copy of your Endnote Library as in Section 7 so that the changes you make will not affect your original library.

To export to Excel we first need to create a new reference style as in Section 4. Make sure that you create a style for each reference type e.g. book, journal article and include all the fields you need e.g. author, title, journal title, volume number etc.
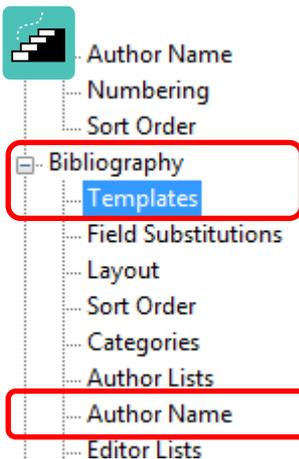
Go to *Edit – Output Styles*, select a new style, and go to *Bibliography – Templates* in the list on the left of the screen.
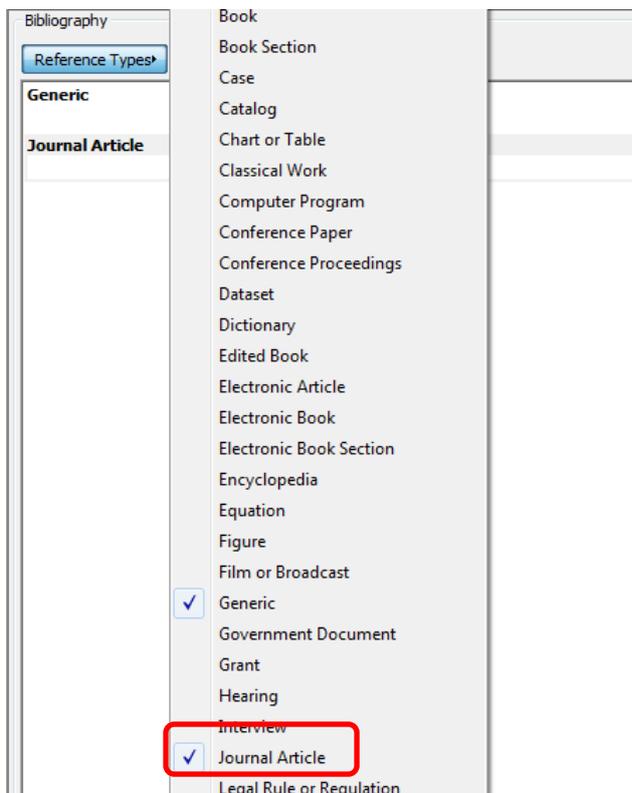
Next, select the reference type you want e.g. journal article and select the fields you want to appear by clicking on *Insert Field* on the right of the screen and selecting from the list. Make sure you put a tab between the fields, this appears in the *Insert Field* list near the top.

Select how you would like the author's name to appear by clicking on the *Author Name* option, which appears under the *Bibliography* option and is highlighted in the image above.

Remember to save the style once you have created it.

Now we need to remove the carriage returns by using the *Edit – Find & replace* function. Find *Carriage return* by using the *Insert Special* menu and selecting *Carriage return* option. Replace it with ";". You are now ready to export your library to Excel.
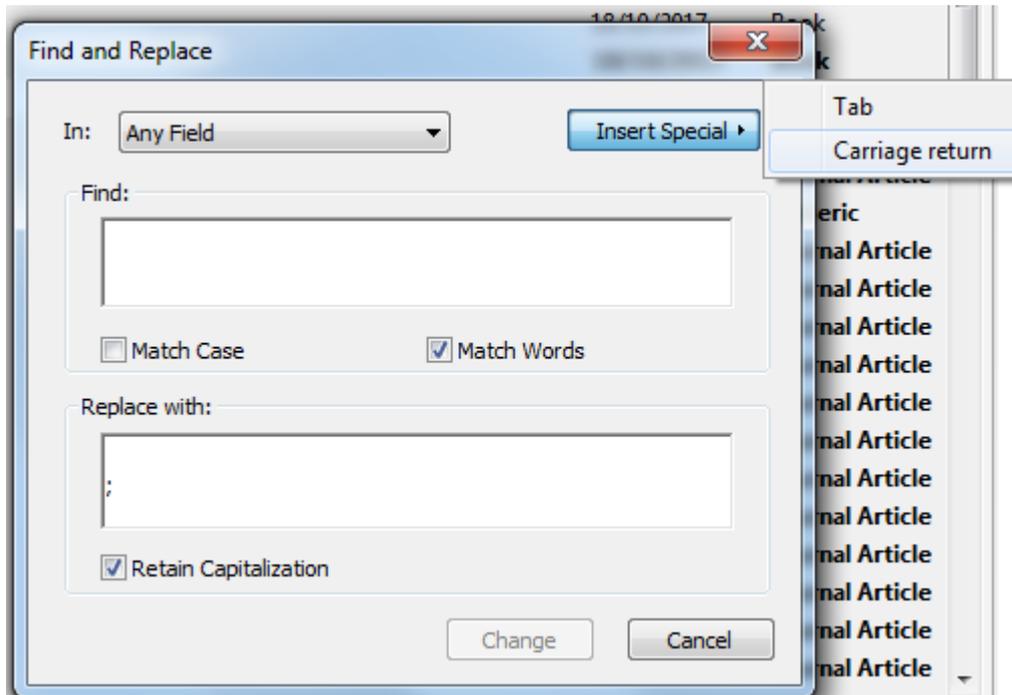
To export follow the instructions in section 17 but make sure the output style is the one you saved earlier. Save the file to your desktop.

In Excel go to *Open Other Workbooks* and *Browse* find your file on the desktop, you might have to change the *All Excel Files* to *Text Files* to find your library. Select *Open* once you have found your file. The options in the Excel Import Wizard should be *Delimited* on the first screen, *Tab* on the second and *General* on the third. Your library should now open with all the references arranged in the appropriate columns.

19.   Help and Training

Free training on how to search databases and is available from any NHS Library in the East of England.

For further help, or to arrange a training session in Addenbrooke's, please contact:

Isla Kuhn, Eleanor Barker, or Veronica Phillips
University of Cambridge Medical Library

Email : librarytraining@medschl.cam.ac.uk
Phone : (01223) 336750
Web : http://library.medschl.cam.ac.uk