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Searching the Evidence

***Managing
references &
bibliographies
using Endnote***



January 2018

Searching the Evidence

Managing references & bibliographies using Endnote

Contents

1. What is Endnote?	2
2. Creating a new library	2
3. Importing References	2
4. Organising References	3
5. Attaching PDFs to a reference.....	4
6. Inserting in-Text Citations and Creating a Bibliography	5
7. Syncing with EndNote Online	6
8. Appendix.....	8
• Cochrane Library (www.thecochranelibrary.com).....	8
• Pubmed (tinyurl.com/campubmed)	8
• Web of Science (http://wok.mimas.ac.uk).....	8
• Scopus (http://www.scopus.com)	9
• NHS databases (http://www.evidence.nhs.uk), then pick “Journals and Databases” ..	9
• Embase (via OVID) (http://gateway.ovid.com)	9
• PsycINFO (via Ebsco) (http://search.ebsco.com).....	9
• Google Scholar (http://scholar.google.co.uk)	10
9. Help & Training	10

To help you use this guide,



indicates a step in the process of searching and retrieving articles.



indicates a tip, or an extra piece of information.

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1. What is Endnote?

Endnote is a reference manager that helps you to organise your research.

With Endnote you can:

- Create and manage citations of books, articles, videos and more
- Import citations from databases
- Organise using groups, tags and filters
- Automatic metadata extraction from imported PDFs
- Highlight and annotate papers

2. Creating a new library



To create a new library go to *File – New*. Name your library and *Save*.



To open an existing library go to *File – Open Library* and browse to find your library or *File – Open Recent* and a list of recently used libraries will open, select the library you want to open from the list.

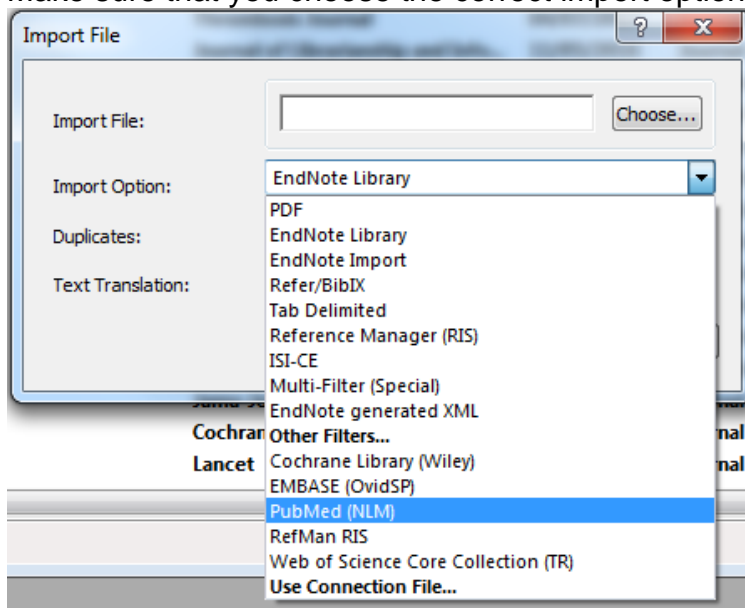
3. Importing References



To import a file of references to Endnote from a database or other source click from the toolbar and browse to select the file.

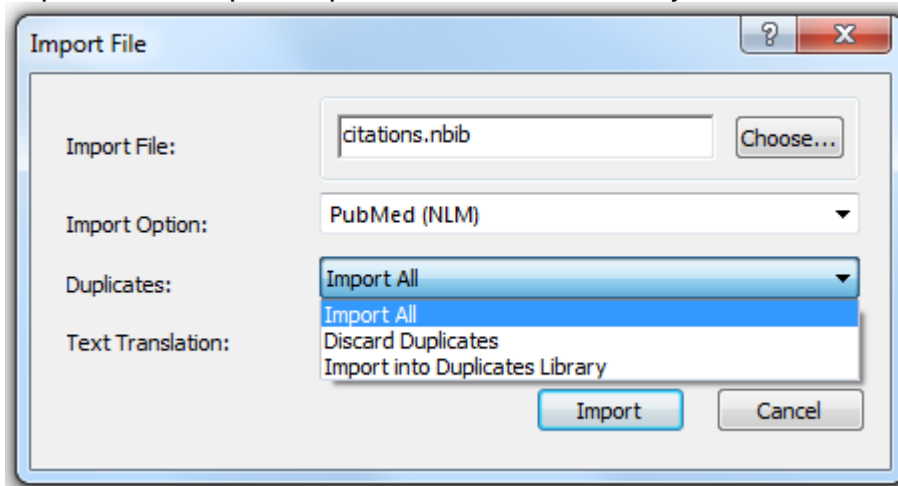


Make sure that you choose the correct import option e.g. PubMed



If the import option you require isn't listed select *Other Filters* and more options will become available.

The duplicates option allows you to Import all references, to automatically discard duplicates or import duplicates to another library.




Once you have selected the correct options click on *Import*. The imported references will appear in *Imported References* and are ready to be filed into groups by dragging and dropping references to the appropriate group.



You may have references you want to add from other sources e.g. from a recommendation or from reading references from another article. It is possible to add references manually into Endnote. In the *References* menu



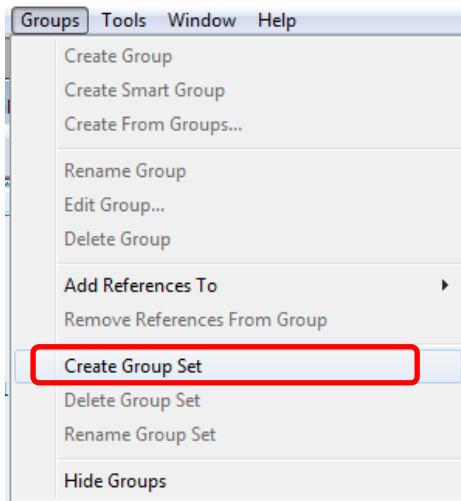
select *New Reference* or click . Select the appropriate reference type, and then fill out the details in the appropriate fields in the form. Close this box and you will be asked to save the reference; it will appear in *Imported References*.

4. Organising References

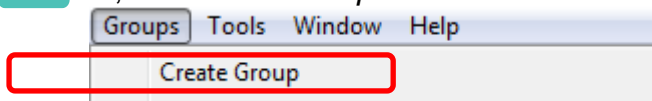
References in Endnote can be organised in Groups and Group Sets. Group sets can be used for a single piece of work e.g. an assignment or research paper. Individual groups within a set could be used for different databases, authors or years. For more distinct pieces of work, a separate library can be created as in section 2 on page 2.



To create a new group set, in the *Groups* menu select *Create Group Set* then give your new Group Set a name. The new group set will appear on the left hand side of the screen.

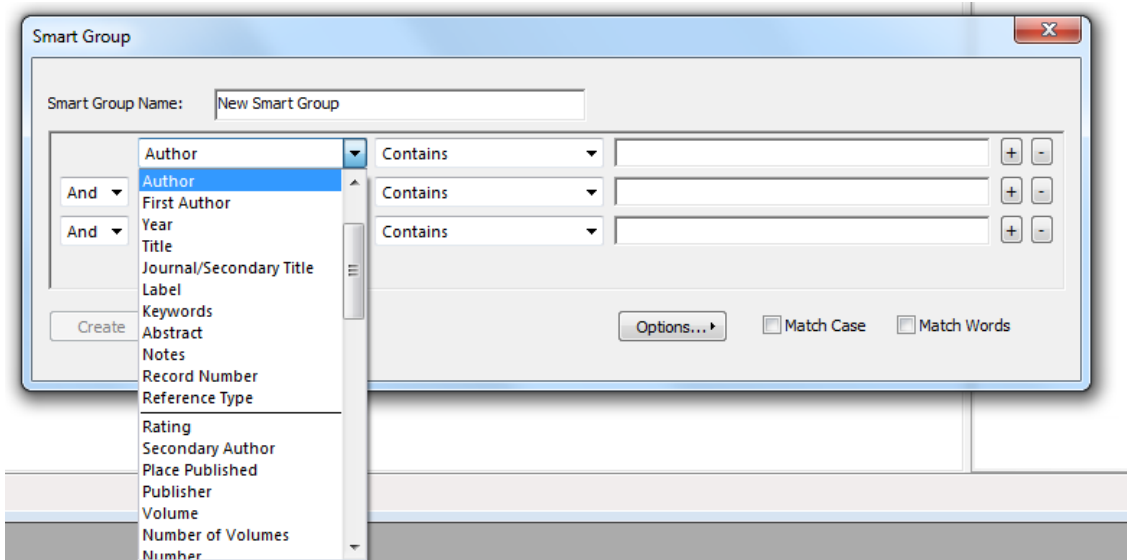


To create a new group select the group set you would like to create a group in, then in the *Groups* menu select *Create Group* and give your group a name.



In Endnote you can create Smart Groups. Smart Groups are groups into which references will be filed automatically depending on criteria you set when you create the smart group.

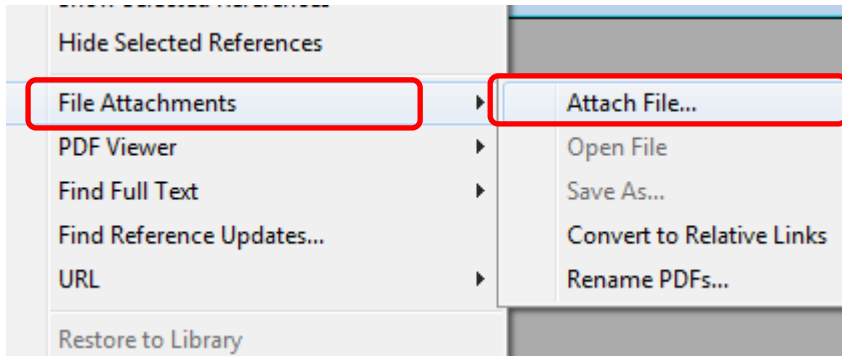
To create a smart group go to the *Groups* menu and select *Create Smart Group*. In the smart group box, name your smart group then select what you would like to be filed into the smart group e.g. all papers by a particular author, with a specific keyword, from a particular year. It is possible to select more than one criteria for your smart group.



5. Attaching PDFs to a reference





To attach a full text article to a reference, highlight the article you want to attach a PDF to. Right click on the reference and select *File Attachments*, *Attach File* from the menu. Find the file that you want to attach and click *Open*.



To view a PDF attached to a reference, on the right side of the screen click on the PDF tab



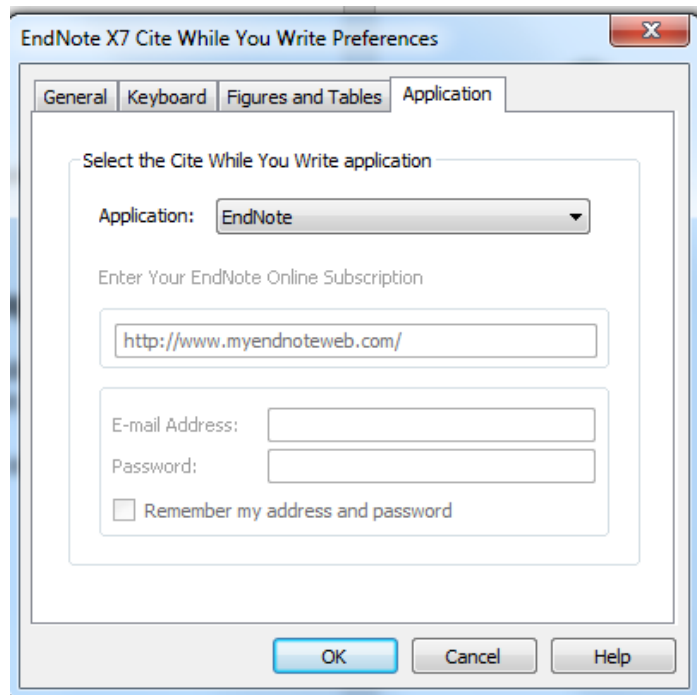
To view the PDF in full screen click on  .

Once you are in the full screen PDF it is possible to annotate with sticky notes and highlight or underline using these buttons 

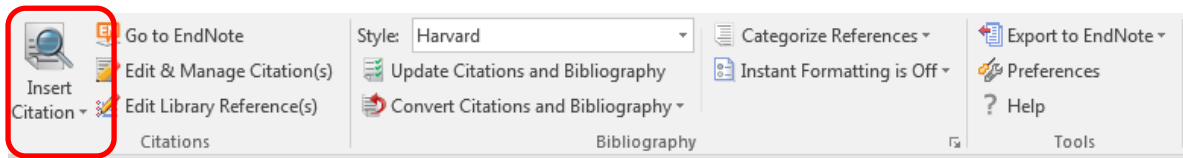
6. Inserting in-Text Citations and Creating a Bibliography

One of the key features of a reference manager like endnote is the ability to insert references into a Word document using the “cite while you write” plugin.

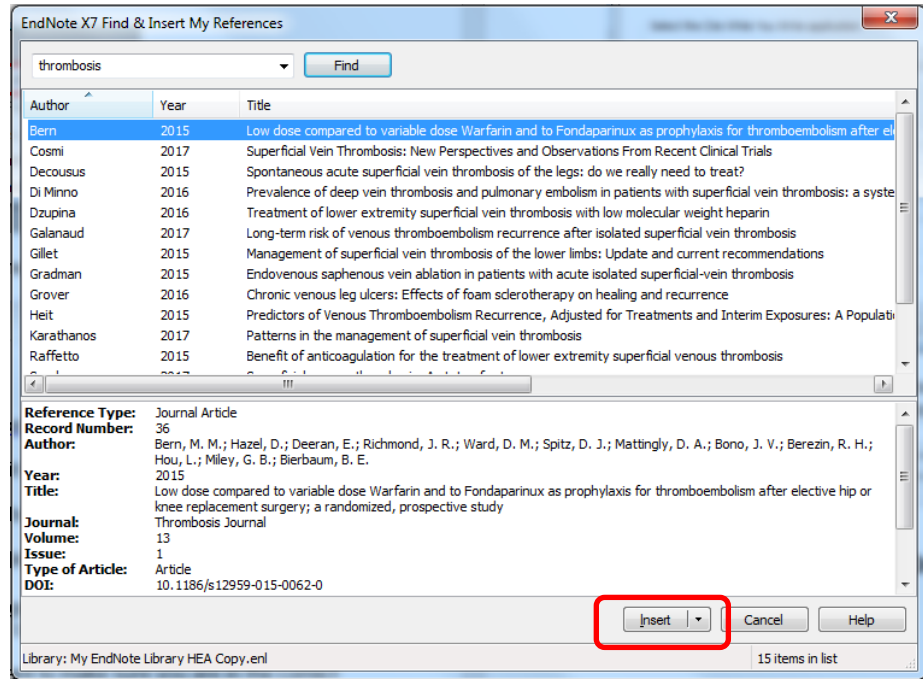
Before beginning to use the plugin, it is important to make sure you are in the correct application Endnote/Endnote Online. To do this in the *Endnote tab* select *Preferences* and select the correct application in the *Application tab*.



As you type your document, when you need to insert a reference, click on the magnifying glass option to “find citation”



Here you have the option to enter the name of the author you're quoting or search for a keyword from a paper. To insert the selected reference click *Insert*.



The reference will be inserted according to the last referencing style you used, but you can change the style of referencing easily using the *Style* dropdown menu in the Endnote ribbon.

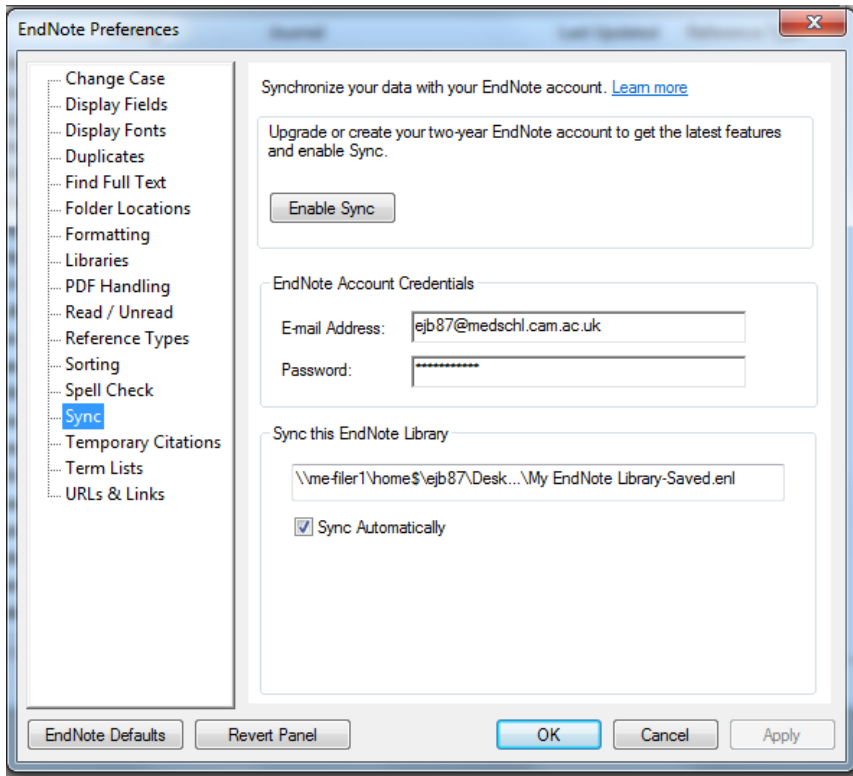
7. Syncing with EndNote Online


It is possible to synchronise your EndNote desktop library with your EndNote online account. This allows you to collect references while you are away from your desktop computer e.g. at a conference or meeting.



In the *Edit* menu, select *Preferences*.

Select the *Sync* option from the list of options in the Preferences box.



Once you have entered your EndNote online account details click the  from the toolbar at the top of the screen or select the *Sync Automatically* option in the *EndNote Preferences* box.

8. Appendix

Importing from the major health and medical databases & iDiscover

- Cochrane Library (www.thecochranelibrary.com)



You must export the selected items in each section of the Cochrane Library separately. Carry out your search and make your selection of relevant items in the first set of results.

Click “export all results” or “export selected citations” as appropriate. Change the “file type” to “Abstract and citation”, and save as a text file (default file name: citation-export.txt).



Open EndNote, from the *File* menu select *Import, File*.



Find your references file, and chose “Cochrane Library (Wiley)” as the filter, the references will appear in Imported References.

- PubMed (tinyurl.com/campubmed)



Complete your search within PubMed, ensure the articles you want are all listed under your “clipboard”.



Open “clipboard” and “send to” ***citation manager***.



Save the file (the default filename will be citations.nbib).



Open EndNote, from the *File* menu select *Import, File*.



Browse to find the citations.nbib file, and chose “PubMed NLM” as the import filter, the references will appear in Imported References.

- Web of Science (<http://wok.mimas.ac.uk>)

Web of Science has a direct link with EndNote since they’re both owned by Thomson Reuters. This means that you can send articles directly to EndNote as a direct export.



Send all your preferred articles to the Marked List and when you’re ready to export open the Marked List, and click “save to Endnote desktop”. Save the file



Make sure you have EndNote open and the export of the articles into the unfiled set will be seamless.

- Scopus (<http://www.scopus.com>)



You can gather the articles you find in Scopus in MyList. Having finished searching, go to MyList and select all the articles, and click on “export”.



Chose format “RIS” and change the information to export to “Citations & Abstract information”.



Click export, and save the file (default filename: scopus.ris)



Open Endnote, from the *File* menu select *Import, File*.



Find your references file, and chose any of the import options that have RIS in their name, such as Procite RIS or Refman RIS as the filter, the references will appear in Imported References.

- NHS databases (<http://www.evidence.nhs.uk>), then pick “Journals and Databases”



You can gather the articles you find in Add to Saved.



Having finished searching, your saved results appear as a line in your search history. Select the line and in Export Options select RIS as the output option then Save File (default filename: HDAS....ris).



Open endnote from the *File* menu select *Import, File*. Find your references file, and chose “Refman RIS” as the filter, the references will appear in Imported References.

- Embase (via OVID) (<http://gateway.ovid.com>)



Complete your search within Embase. Find the references you want and add them to Keep Selected.



Find the row of selected references in the search history and display them.



Select the Export option and Format RIS. Select the required fields. Export the file



Open EndNote, from the *File* menu select *Import, File*. Find your references file, and chose “Refman RIS” as the filter, the references will appear in Imported References.

- PsycINFO (via Ebsco) (<http://search.ebsco.com>)



Add your selected items to “folder” as you search, and when you’re finished, open the folder.

Select all the articles, and click the “export” option. Select **direct export to RIS format** and click save (default file name: delivery.ris).



Open EndNote, from the *File* menu select *Import, File*. Find your references file, and chose “Refman RIS” as the filter, the references will appear in Imported References.

- Google Scholar (<http://scholar.google.co.uk>)



Before you search, click on the ‘setting’ icon.



In the bibliography manager, select “show links to import citations into” and chose Endnote, and save.



Run your search, and notice the ‘import to endnote’ option beneath each entry. Click on this, and save the file (it will probably be called scholar.enw).



Open EndNote, from the *File* menu select *Import, File*.



Browse to find the file, then select “Endnote Import” as the import option. The references will appear in Imported References.

9. Help & Training

Free training on how to search databases 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>

