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Using Endnote 20 advanced features



February 2021

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To help you use this guide,



Indicates a step in the process of using Endnote



Indicates a tip, or an extra piece of information.

February 2021

1. Introduction

This guide follows on from the Endnote top tips 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.

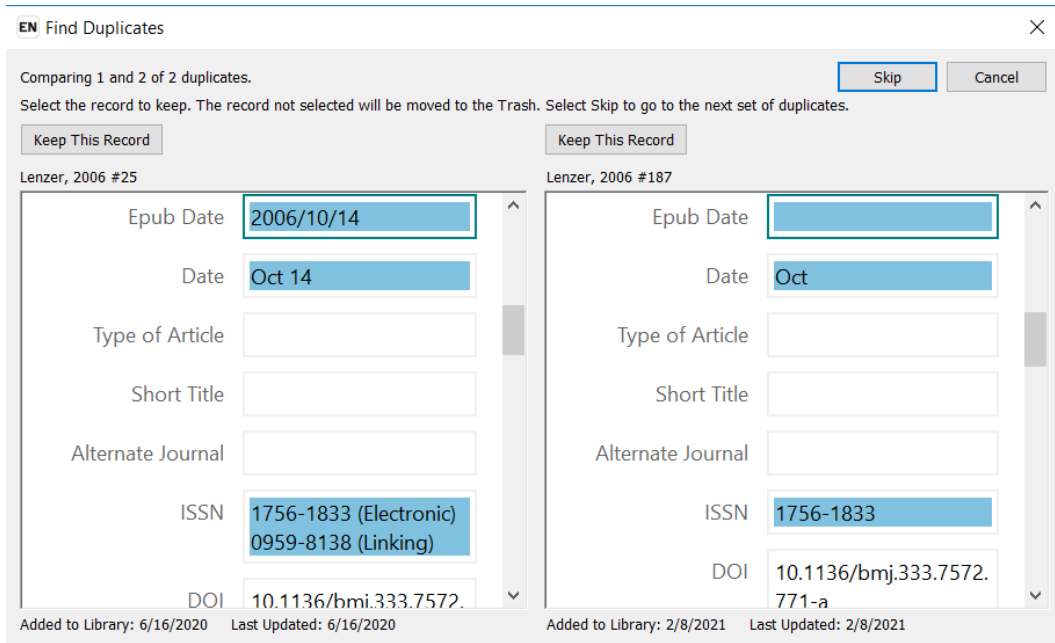
●	🔍 Author	Ye...	Title	Rating	Journal	Last Upd...	Reference T...
●	Lenzer, J.	2...	The importance of smelly feet ...		BMJ	2/8/2021	Journal Arti...
●	Skrypnik, ...	2...	The influence of dietary patter...		Acta Sci ...	2/8/2021	Journal Arti...
●	Lanthier, L...	2...	[In patient with symptomatic p...		Rev Med...	2/8/2021	Journal Arti...
●	Alkandari,...	2...	Proteomics of extracellular vesi...		PLoS One	2/8/2021	Journal Arti...
●	Acosta-N...	2...	Consumption of animal-based...		Rev Ass...	2/1/2021	Journal Arti...
●	Garcia-Lit...	2...	First-in-Human Study of Paclita...		JACC Car...	2/1/2021	Journal Arti...


3. Finding duplicates

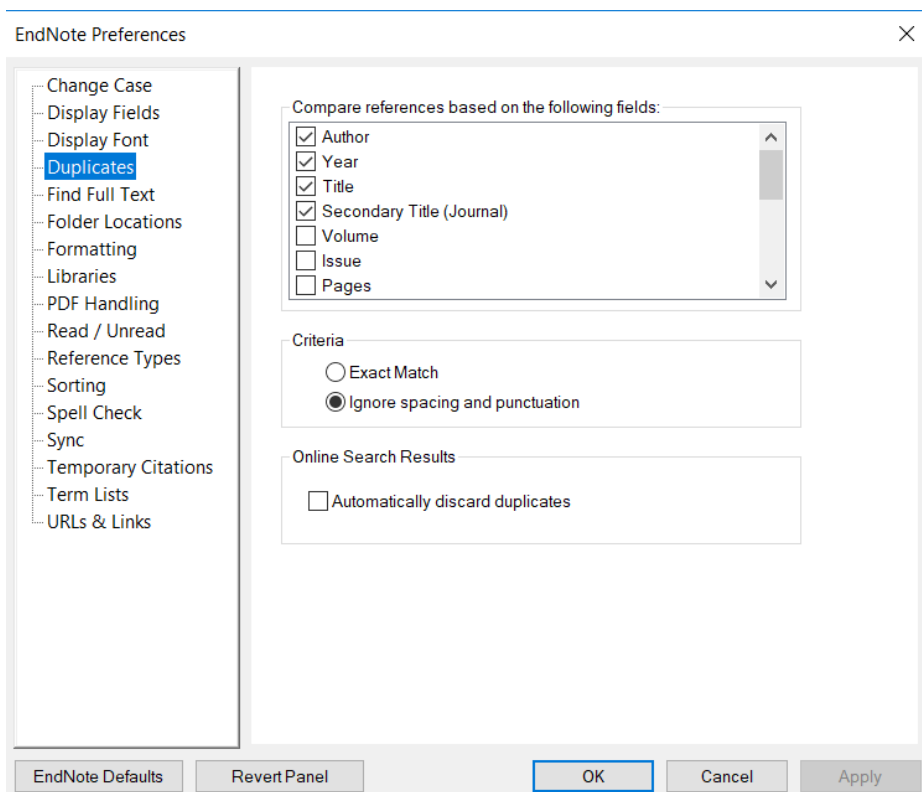
If you are importing references from a number of different sources you may have duplicate references in your library. Endnote can help remove duplicates. Before you begin to remove duplicates, save a copy of your library



Go to *Library* menu and select *Find Duplicates*. If any duplicates are found they will appear side by side so you can select which to keep. To scroll through the whole list of duplicates click cancel and the duplicate items will be highlighted in your Endnote library. The selected items can all be removed by clicking delete. Make sure that they are duplicates before they are removed as this step can't be undone.



 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. Our recommended pattern is:

1. Author, Year, Title, Secondary Title, Volume
2. Author, Year, Title, Secondary Title,
3. Author, Year, Title, Secondary, Volume
4. Author, Year, Secondary Title, Volume

5. Author, Title, Secondary Title, Volume
6. Year, Title, Secondary Title, Volume
7. Author, Year, Title,
8. Author, Year, Secondary Title,
9. Author, Title, Secondary Title
10. Year, Title, Secondary 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.

[This paper](#) gives more detail on making your deduplication process even more thorough.

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.

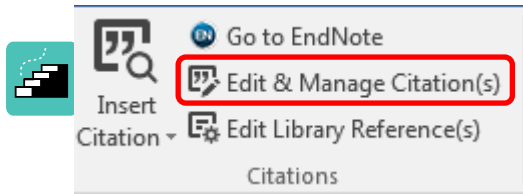


In Endnote go to the *Tools* menu - *Output Styles* - *New Style* for a new referencing style or *Open Style Manager* to edit a style.

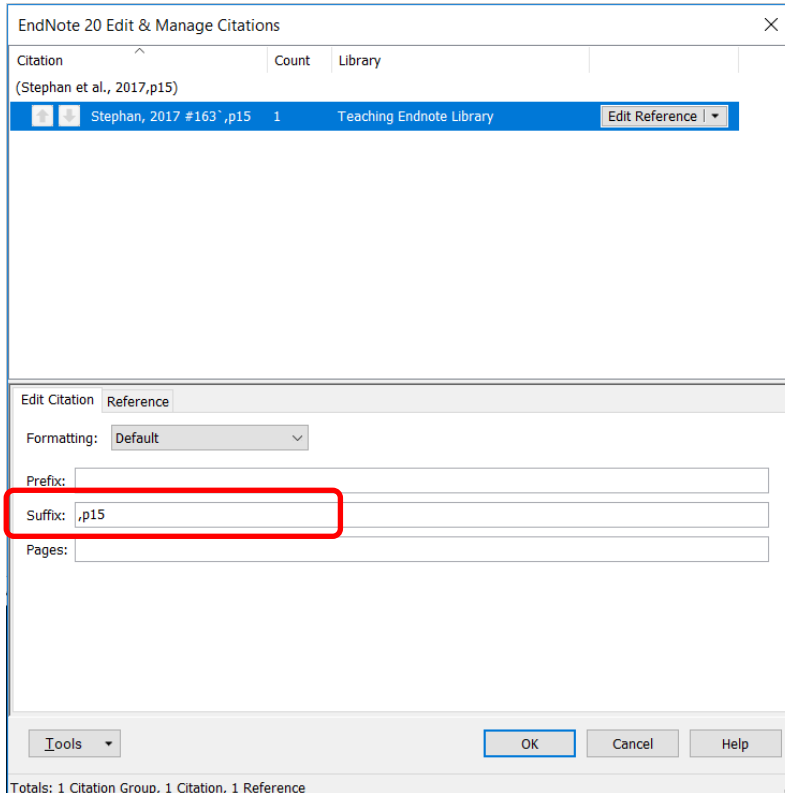
Once in Style Manager select the style you would like to edit, select *Edit* and the fields you would like to change e.g. *Page Numbers*.

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

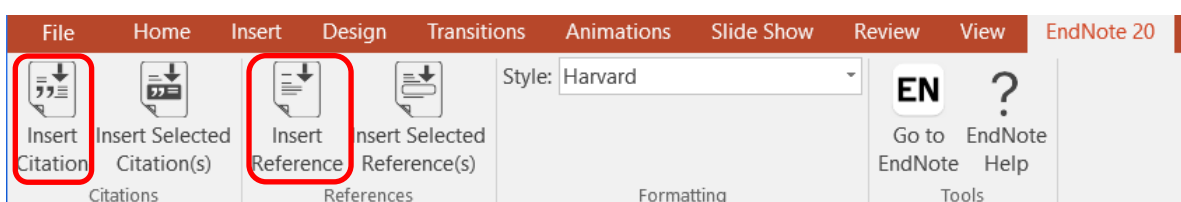
To insert a citation and reference into PowerPoint you need to have installed the plugin that is also used in Word.



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

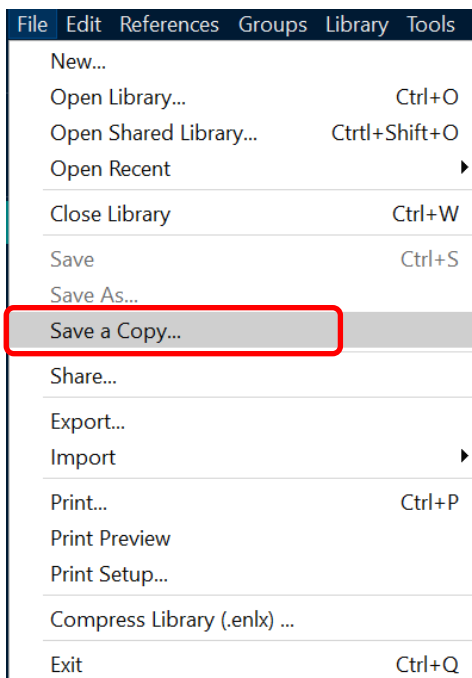


My EndNote Library-Saved.Data



My EndNote Library...

To create a copy of your library go to *File – Save a Copy* and *Save*.

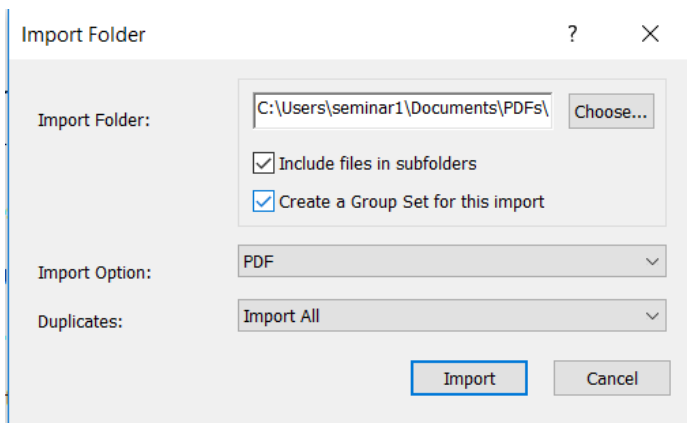
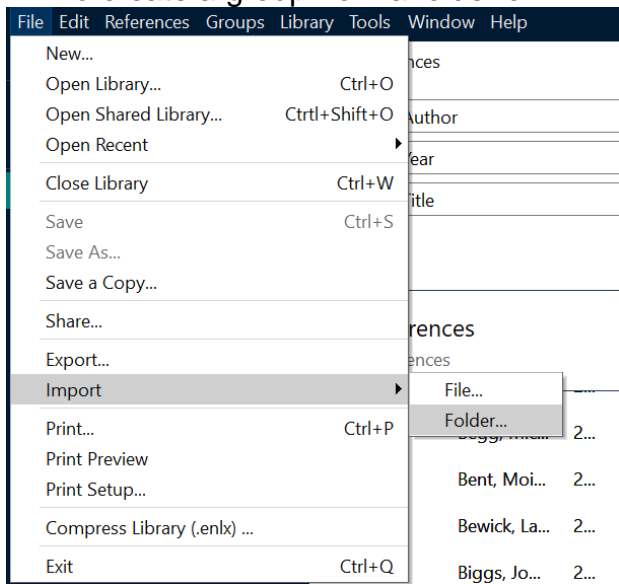


8. Changing text

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



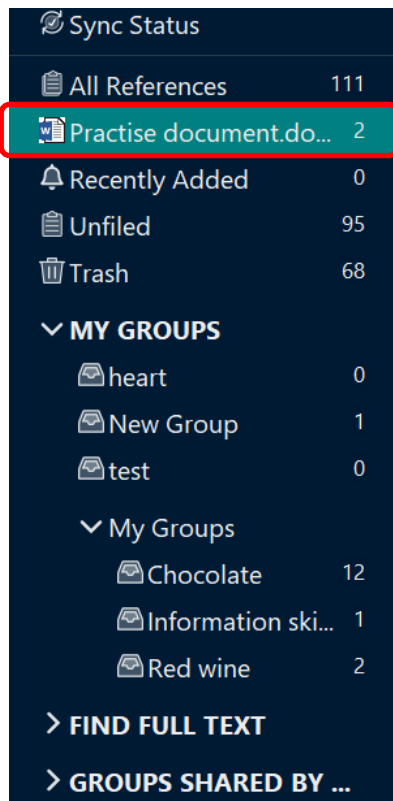
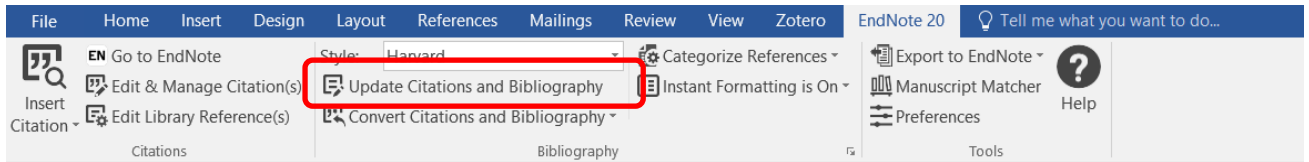
Check the references once they are imported as the record may not be as complete as one you have downloaded from a database. If you are importing scanned PDFs there may be a record created but no data in it as Endnote relies on DOIs to source the data and a scanned PDF will not have a DOI.

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

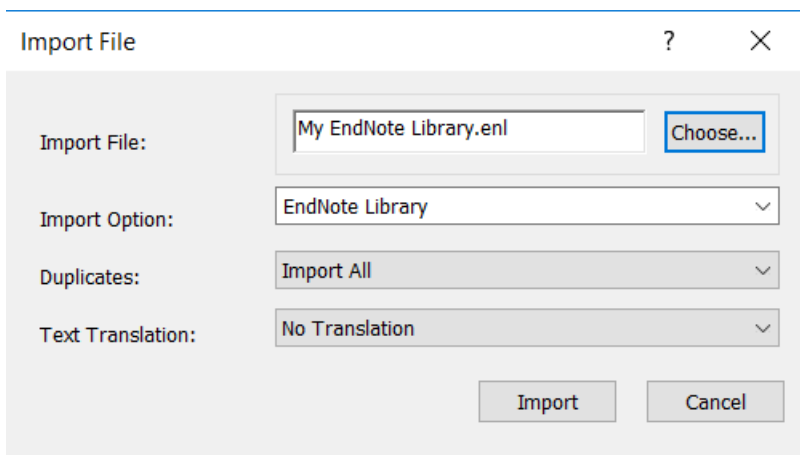
To merge two Endnote libraries together:



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

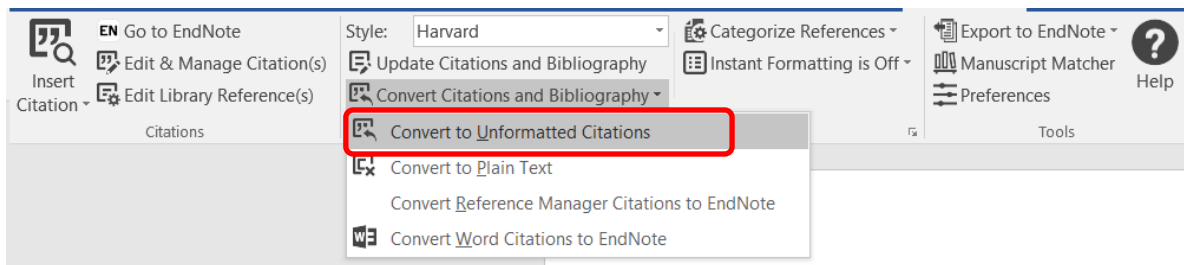
To move text around within a Word document it is possible to cut and paste as usual.

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*.

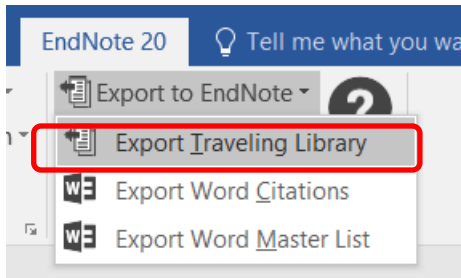
Add the relevant information to the fields e.g. Title, caption. The image can then be attached to the reference record.

14. Travelling library

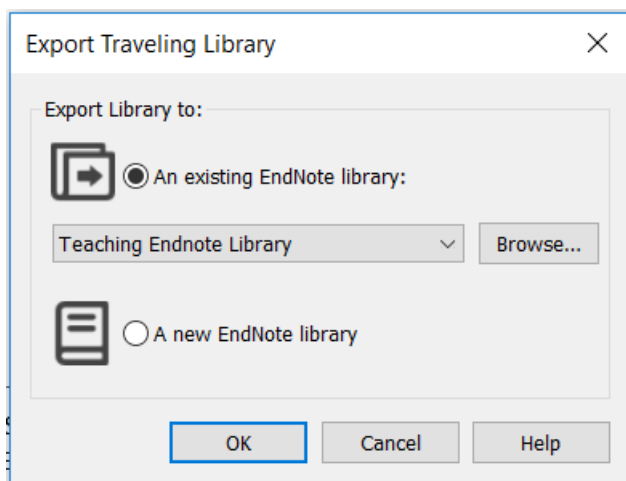
When citations are added to a document, a travelling library is created. From these references, it is possible to create a new library or add these references to an existing library.



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.

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).

The screenshot shows a search results table with columns: Author, Year, Title, Rating, Journal, Last Updated, Reference Title, and Address. The first row is highlighted in green. A dropdown menu is open over the table, showing various citation styles. The 'Harvard' style is selected and highlighted with a red box. To the right of the dropdown, a preview of the Harvard citation style is shown for the selected reference.

Author	Year	Title	Rating	Journal	Last Updated	Reference Title	Address
Alkandari, ...	2...	Proteomics of extracellular vesic...		PLoS One	2/8/2021	Journal Arti...	2/8/...
Freeman, ...	2...	Sex Differences in Demand for ...		Int J Neu...	6/10/2020	Journal Arti...	6/10/...
Johnston, ...	2...	Blastocervulus metrosideri sp. ...		Fungal S...	6/10/2020	Journal Arti...	6/10/...
Lanthier, L...	2...	[In patient with symptomatic p...		Rev Med...	2/8/2021	Journal Arti...	2/8/...
Michailidi...	2...	Synergistic, bacteriostatic effec...		Food Sci...	9/8/2020	Journal Arti...	6/10/...
Nejati, V.; ...	2...	Transcranial Direct Current Stim...		J Atten ...	8/5/2020	Journal Arti...	6/10/...
Recknagel...	2...	Development of certified refer...		Anal Bio...	6/10/2020	Journal Arti...	6/10/...
Rienks, J.; ...	2...	Dietary flavonoids among chil...		Br J Nutr	6/10/2020	Journal Arti...	6/10/...
Silvestri, ...	2...	Advances in cultivar choice, ha...		J Sci Foo...	6/10/2020	Journal Arti...	6/10/...
Skrypnik, ...	2...	The influence of dietary patter...		Acta Sci ...	2/8/2021	Journal Arti...	2/8/...
Steins-Lo...	2...	Does acute stress influence the...		Psychop...	6/10/2020	Journal Arti...	6/10/...

Style Selection Menu:

- Select Another Style...
- Annotated
- APA 6th
- Author-Date
- BMJ
- Chicago 16th Footnote
- EndNote Export
- Excel
- Harvard**
- MIRIA (Author-Date)
- Numbered
- RefMan (RIS) Export
- Show All Fields
- Turabian 8th Footnote
- Vancouver

Preview of Harvard style:

LANTHIER, L., HUARD, G., PLOURDE, M. E. & CAUCHON, M. 2020. [In patient with symptomatic peripheral arterial disease who had undergone lower-extremity revascularization, does rivaroxaban 2.5mg twice daily plus aspirin reduce the composite risk of acute limb ischemia, stroke or to aspirin alone while

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 Reference* from the menu or select *Copy Formatted Reference* from the *References* menu.

The screenshot shows the same reference management software interface. A context menu is open over the selected reference row. The 'Copy Formatted Reference' option is highlighted in blue. The menu also includes options like 'New Reference', 'Edit Reference', 'Copy References To', 'E-mail Reference', 'Move References to Trash', 'Add References To', 'Remove References from Group', 'Cut', 'Copy', 'Paste', 'Find Full Text', 'Authenticate...', 'Find Reference Updates', 'OpenURL Link', 'Open URL', 'Mark as Read', 'Mark as Unread', and 'Rating'.

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 *Library - 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.

The screenshot shows the 'Change/Move/Copy Fields' dialog box. The 'In:' dropdown menu is open, displaying a list of fields: Keywords, Abstract, Notes, Secondary Author, Place Published, Publisher, Volume, Number of Volumes, Number, Pages, Section, Tertiary Author, Tertiary Title, Edition, Date, Type of Work, Subsidiary Author, Alternate Journal/Title, Short Title, ISBN/ISSN, Original Publication, Reprint Edition, Reviewed Item, Custom 1, Custom 2, Custom 3, Custom 4, Custom 5, Custom 6, and Custom 7. The 'Custom 1' field is selected. The 'Move/Copy Fields' tab is active. The background shows a list of records with 'Anal Bio...', 'Br J Nutr', and 'J Sci Foo...' highlighted.

Select the field you want to change e.g. Custom 1.

The screenshot shows the 'Change/Move/Copy Fields' dialog box. The 'In:' dropdown is set to 'Custom 1'. The 'Change' section is active, showing options: 'Insert after field's text:', 'Insert before field's text:', 'Replace whole field with:' (selected), 'Clear field', and 'Change case' (Sentence case). The text area contains 'Reviewer 1'. The 'Move/Copy Fields' tab is active. The background shows a list of records with 'Anal Bio...', 'Br J Nutr', and 'J Sci Foo...' highlighted.

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.

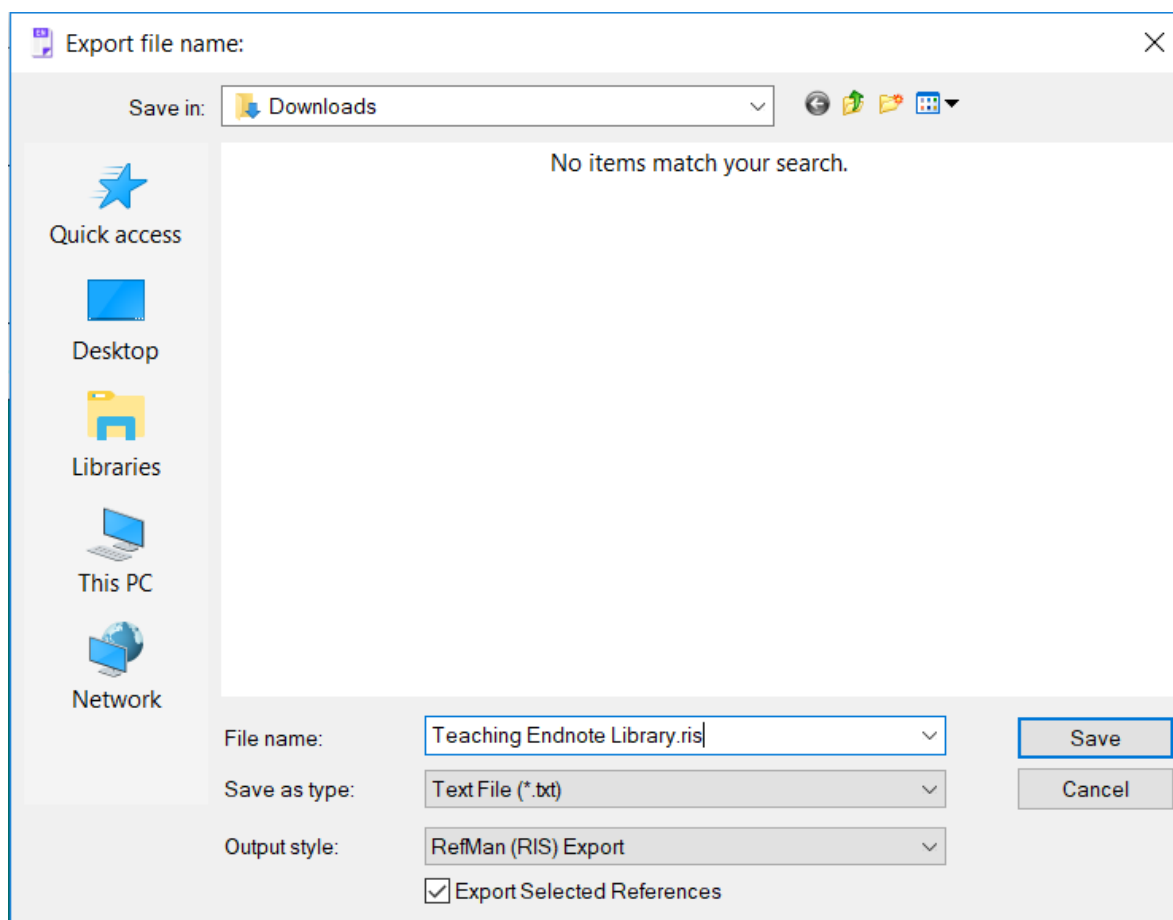
17. Exporting your Endnote library to another reference manager

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*, then *Edit – Select All*)

Then *File - Export*.

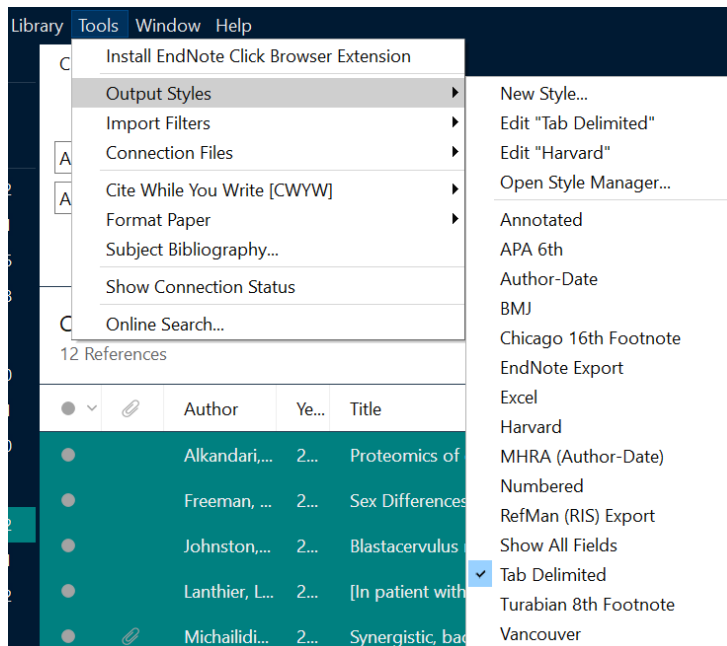


Make sure you choose an output style that is compatible with the place that you are sending them, e.g. RIS for another reference manager. If the style you want isn't there you can *Select Another Style* and choose from the list of options.

18. Exporting References to Excel



Go to *Tools – Output Styles*, and select *Tab Delimited*



Next highlight the references you want to export and select copy formatted references as in section 15. In Excel place the cursor in cell A2 and paste the references (CTRL + V or *Edit, Paste*)

19. Sharing your Endnote library



In Endnote it is possible to share your library with up to 100 others without having to export it as a file. To share your library you need to have an Endnote online account.



Before you can share your library you must make sure that it is fully synchronised with your Endnote online account



To share your library go to the *File* menu and select *Share...*

Enter the email addresses of the people you would like to share with. They will then receive an email with instructions.

Your shared groups will appear under the *Groups shared by Others* group set



Once you have shared your library you should regularly make backups of the library as anyone you have shared it with can make changes.

20. 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>