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ENDNOTE X5 FOR HEALTH

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If you require this information in an alternative format (i.e. large print, Braille or audio format), please contact any library enquiry desk or telephone (0113) 343 5663 and staff will make the necessary arrangements.

EndNote helps you collect and store all the references you have found from different sources. With a few clicks of the mouse, you can use your EndNote library to create bibliographies in your Microsoft Word documents and reformat them into your chosen referencing style.

Reference Manager and ProCite are similar products from the same company. If you have been using one of these products and wish to change to EndNote, you should be able to import your files into EndNote using the appropriate import filter.

EndNote is available on the ISS desktop. Students (not staff) can also use EndNote via Desktop Anywhere, which offers remote access to selected University software. For more information, see http://iss.leeds.ac.uk/info/290/student_computing/301/desktop_anywhere

A personal copy can be bought from the Adept Scientific website – see http://edustore.adeptscience.co.uk/

Aims

By the end of this workbook you will know how to:

- Create an EndNote library
- Use your EndNote library to create a bibliography in Microsoft Word 2007
- Add references into your EndNote library
- Organise your Endnote library effectively

About this workbook

- This workbook assumes you are using EndNote with Word 2007
- Things that you need to type are displayed in **`Courier New bold`** font
- Instructions assume that you are using Internet Explorer (the ISS supported Web browser)

Further help

If you have completed this workbook and need further help you can try the following:

1. EndNote comes with a large **PDF manual** explaining everything you might want to know about the software. The manual is available from Start > All Programs > Miscellaneous > EndNote > EndNote Help (or the folder on your own PC where EndNote has been installed e.g. C > Program Files > EndNoteX5)
2. The software suppliers maintain a site, including online discussion forums, at http://www.endnote.com/
3. The Library maintains some support pages for EndNote at http://library.leeds.ac.uk/skills-endnote
4. Your Faculty Team Librarian can provide support on using EndNote with databases in your subject area – for contact details see: http://library.leeds.ac.uk/subjects

Part A - Adding references to an EndNote library

1. Opening EndNote and creating an EndNote library

Note: these instructions describe using EndNote version X5 on a computer in an ISS cluster.

Exercise 1

To open EndNote, click on **Start** and select **All Programs > Miscellaneous > EndNote** > **EndNote X5**

If an Endnote Web window opens, click **Cancel**.

Once EndNote is open, click **Create a new library** or you can do this by going to **File** and then **New**.

Name your file **practice.enl** and save it to your M:drive

Now close your EndNote library and the EndNote software.

2. Importing/exporting references to your EndNote library

You can send your search results straight to your EndNote library from most databases.

Some databases have an **export** feature which automatically transfers your database search results straight into your library. Other databases only allow you to save your results as a **text file** which you can then import into your EndNote library.

Medline (the major medical database) has an automatic export feature but the PubMed version of this database only allows you to save your results as a text file.

In the next exercise you will have a chance to practice using both of these methods. You will be sending some of the same references into your EndNote library so that you can practice removing duplicates later on.

Exporting references to EndNote from Medline

Exercise 2a

Go to the Library homepage: http://library.leeds.ac.uk

Use the catalogue search box to search for **`Medline.`** Select Medline from the results list. Then click on the blue link **Medline -- Ovid Databases.**

Log in using your **ISS username and password** if prompted.

In the alphabetical list, find and click on the link to the most recent section of **Medline** - Ovid MEDLINE(R) 1996 – [present day]

You should now be on Medline's advanced search screen.

In the search box type **`acute kidney failure`** and click on **Search**

Choose which results you want to keep – you can tick individual results or tick the box to the top left of your list of results to select all of them (next to where it says Select Range). Tick a couple of your results.

Then, click on the **Export** option on the bar above your main list of results.

This should open a window. Click on the drop down menu called **Export to**: and choose EndNote

Under **Select Fields to Display**, choose how much of each reference you want to keep. For this exercise, the second option **Citation + Abstract** will be sufficient. This will export details of the author, title and source of your results as well as the summary paragraph.

Then click **Export Citation(s)**

If a security box pops up, just click **Allow**

You may need to select EndNote (rather than Reference Manager etc) in another box if you are given a choice of destination software. Click EndNote and OK.

The EndNote software should open automatically, and your references should be brought over into the library you have open. If you didn't have a library open at the time, you would be prompted to choose one (you need to have created one before you try to export results).

If you get an error message, close your EndNote library and try the export again.

EndNote sometimes asks you to choose the correct filter so that it knows how to format the incoming search results. This will enable EndNote to correctly display the author, title, journal title etc information in your library. If you are prompted, you should choose Medline (OVIDSP) as this is the database (and provider) we have been using. Then click **Choose**. Note that filters exist for the majority of databases.

NOTE: THE DOWNLOAD PROCESS CAN TAKE A FEW MINUTES, ESPECIALLY IF YOU ARE WORKING WITH LARGE NUMBERS OF REFERENCES.

NOTE:

Initially, only the most recently added references are visible. Any other references you may have stored in your library are still saved but aren't displayed. Along the bottom of the window you can see the total number of references stored in your library.

To see all references in the file at once select **References** then **Show All References**.

The contents are sortable by clicking on a column heading (Author/Year/Title etc). Clicking on a column heading again reverses the sort option.

You can show or hide a **preview** of a highlighted reference by clicking on **Show Tab Pane** or **Hide Tab Pane** at the bottom right of the window.

You can adjust the width of your columns to make data more visible. Place your cursor (mouse) between two column headings and when it turns from a pointer into a cross, click and drag to the sides to resize.

You can also choose which **columns are visible** (maximum of 8 at a time) – to do this, go to **Edit** > **Preferences** and click on **Display Fields**. Here, you can choose which fields of information are displayed, and in which order they appear. You can even re-label the column headings by typing an alternative into each **Heading** box.

Importing references into EndNote from PubMed

Some databases, like PubMed, do not have an automatic **export** feature but may allow you to save your references as a **text file**. From there, you can then **import** the contents of the text file into your EndNote library.

Exercise 2b

Go to the Library catalogue and search for **`PubMed`**.

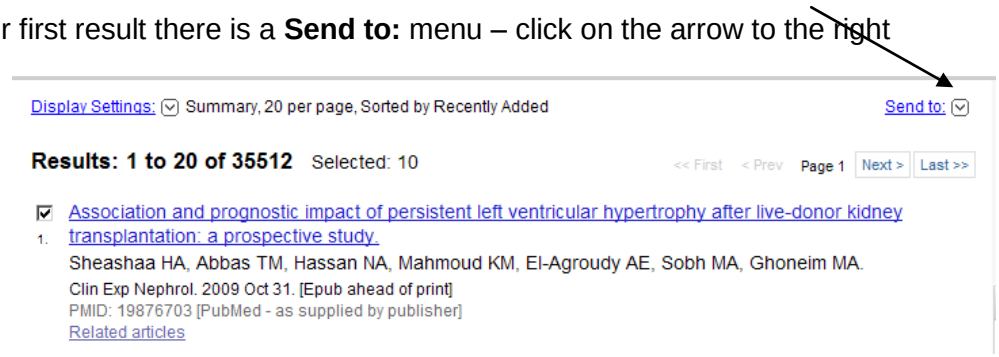
Find the result for PubMed [electronic resource] and click on the link 01 Jan 1948- (under **Available online)**.

In the search box, type **`acute kidney failure`** and click on **Search** (note: you get a different number of results than you did in Medline because the databases carry out their searches in a completely different way).

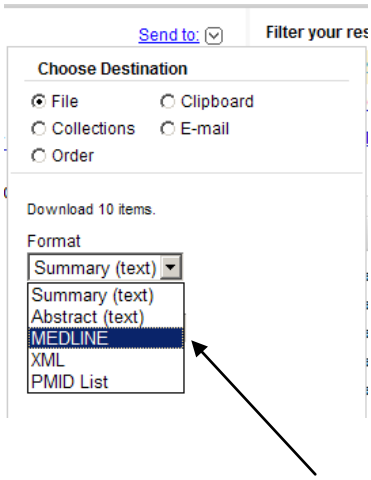
For this exercise, we will just keep the first 10 records, so put a tick in the boxes to the left of the first 10 results.

You now need to prepare your results so they can be saved as a text file:

1. Above your first result there is a **Send to:** menu – click on the arrow to the right

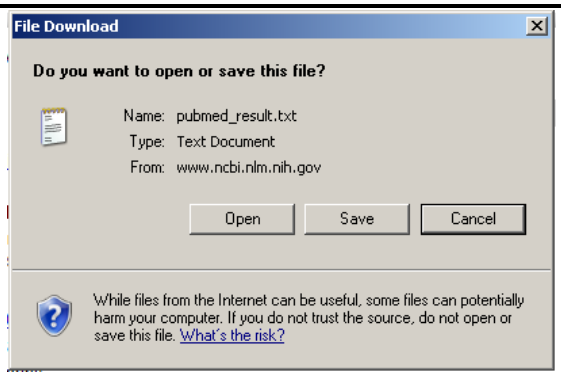


From the options that appear, select **File**. This will make some further options appear:



Look for the box marked **Format.** You need to change this to **Medline** using the drop down menu.

Then click **Create File.**

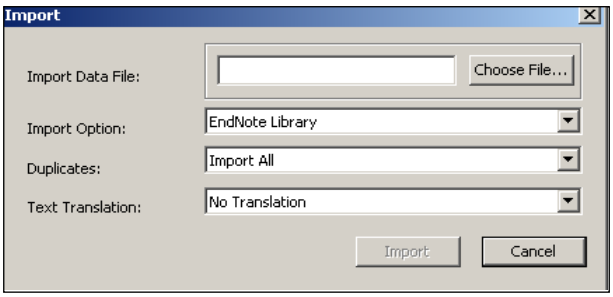


When you see this box, click on **Save** and save the file to wherever you usually like to store your files e.g. on your M:drive

Now switch back to the window with EndNote running.

Go to the **File** menu and choose the **Import** option and **File…**

You will then see the following screen:



Choose the following:

Import Data File: Click on Choose File… and navigate to where you just saved the text file from PubMed. The
file name is **pubmed_result.txt** unless you changed it. Click on Open to select that file.

Import Option: Use the drop-down menu to choose Other Filters…, scroll down to the **PubMed (NLM)** option
and click on **Choose**. Leave the **Duplicates** and **Text translation** options as they are. Then choose **Import.** Your latest references should have been added to your library.

Initially you will only see those newly added references - to see all references in your EndNote library click on **All references** down the left hand side.

3. Notes on manually adding references to your EndNote library

As you have already seen, many databases have the ability to automatically transfer any results you find straight into your EndNote library. However, not all databases or other search tools have this feature. Also, you might already have some references that you want to add, so sometimes you will need to type in your references by hand.

Guidelines for entering new references:

- To add a new reference, go to **References** and click **New Reference**
- Remember to select the appropriate option from the **Reference Type:** drop down menu before entering any details. If you don't, the correct field titles (Author, Journal, Volume, etc) will not be available and your bibliography will not format properly
- Authors can be entered in the format Bloggs, Jo C. or Jo C. Bloggs – but be consistent
- You need to enter your references using capital letters where you would want them to appear in your citations (e.g. Bloggs, Jo C not BLOGGS, JO C. or bloggs, jo c)
- Organisation names must be followed by a comma e.g. Department of Health, – otherwise EndNote will assume the last word is an author's surname and your citations will appear as (Health 2005) instead of (Department of Health 2005)
- Where there is more than one author these should be entered on separate lines (use the return key after each author name)
- Red text indicates a name which has not been entered into this EndNote library file before
- You can move between fields by using the tab key or by clicking on each field with your mouse

When you have typed in all the details for e.g. a book, close the **New Reference** window by clicking ☒ in the top right hand corner. This saves and files the reference in your library. **Take care** to just close down the window you have been typing into and not the whole EndNote program.

Part B – Working with Word 2007

1. Creating a bibliography with EndNote

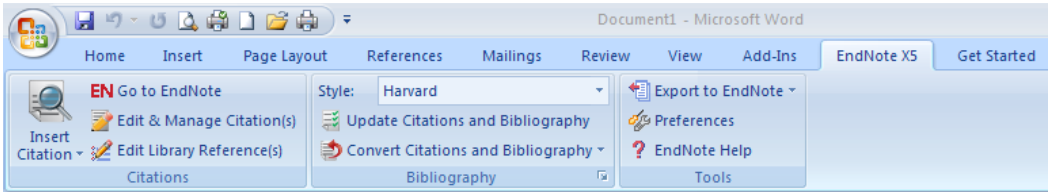
The real power of EndNote is using it in combination with Word, to add references to your text and to create a bibliography at the end.

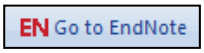
EndNote has a feature called **Cite While You Write** which starts creating your bibliography as soon as you insert your first reference into a Word document. Word 2007 has an **EndNote tab** which allows you to work between your Word document and the references in your EndNote library.

Exercise 1

Open Word 2007 from under **Start** > **All Programs > Microsoft Office 2007 > Microsoft Office Word 2007**
In your document, type some example text – just so that you can practice inserting some citations into it.
In Word, look at the toolbar at the top and click on the **EndNote X5 tab**

You should now be able to see these buttons:

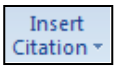


You can use the 

button to switch back into EndNote at any time.

Go to your EndNote library now and highlight a reference of your choice by clicking on it once.

Go back to the window with your Word document open and place your cursor exactly where you would like to insert the citation in the body of the text, making sure you leave a space on each side as necessary.

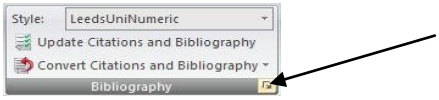
Click on 

and then on

to insert the reference.

Word and EndNote will automatically format the reference, and insert a bibliography at the end of your document.

If new citations added to your text are not automatically appearing in your Bibliography, click on the button to the right of 'Bibliography' in the EndNote toolbar (see screen shot to right).
Go to the **Instant formatting** tab, and select **Turn on** instant formatting.

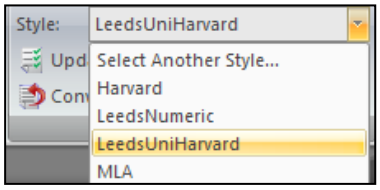


Future references should now appear automatically in your bibliography.

2. Formatting a bibliography with EndNote

Exercise 2

To reformat your Word document's bibliography so it uses a different referencing (or 'output') style you need to use the EndNote tab. In the Bibliography section which displays at the top of your screen you will see a drop down style box, as in the next image:



You can select one of the styles listed (these are just the most popular), or click on **Select Another Style** to see all available styles. This will bring up another box with thousands of other styles to choose from.

Note that you can sort the styles alphabetically by clicking on **Name**. You may notice that there are several versions of the Harvard style available. The style called LeedsUniHarvard matches the guidance on the Library webpages for the Harvard style (based on the British Standard for Harvard). For further referencing information see the Library referencing webpages: http://library.leeds.ac.uk/skills-referencing

Confirm **OK** and the citations and bibliography will be reformatted. This may take a few seconds.

3. Further notes on working with EndNote and Word

Locating references in EndNote from Word

To search for a particular reference in your EndNote library whilst inside Word, first put the cursor where you want to insert the citation, and then use the icon. For example, try searching for articles by Selden, select **Insert** to add the reference to your Word document.

Editing output styles

If you have your **own** copy of EndNote, you can edit the styles and make them look exactly the way you want them. For example, you can change a citation number in the text to superscript[1] in a style that is usually in brackets (1), or change the numbers of multiple authors appearing in the text or bibliography. Information about editing output styles and other more advanced help can be obtained from the **Endnote support** webpages maintained by the library: http://library.leeds.ac.uk/skills-endnote

Citing page numbers

If you are directly quoting from a text you may need to include the page numbers in the citation. This isn't supported by all referencing styles.

Part C – Managing your EndNote Library

1. Top tips

- Use only 1 EndNote Library with any given Word document. If you try and take references from more than one Library for the same document you will encounter difficulties in formatting and ordering your references.
- Organise your records within your EndNote Library by making use of groups, and fields for adding notes and keywords. Always be consistent when putting information into these fields.
- Be consistent in your use of Reference type when adding new references.

2. Adding notes and keywords

It is good practice when exporting/importing references to add a note to the records so that you can identify where they came from, or what you plan to do with them.

Exercise 2

If you return to the practice.enl EndNote Library you created earlier you should be able to see only those references that you imported as a text file from PubMed. You can move between the references you have just imported and your existing references using the options in the Groups column to the left of the screen.

The import group in the Groups column only contains the last set of references you imported. If you import a new set of references, the import group will contain only the new set of references. Therefore you should add notes to groups of imported records as you import them.

To add a note to all of the references you have imported, which are visible in the window, go to **Tools**, then **Change and Move Fields**. On the **Change Fields** tab, choose **Notes** from the drop down menu, then type into the box **`acute kidney failure – PubMed`** and today's date. Click on **OK**, and confirm when asked by selecting **OK** again.

Open one of the references by double clicking on it and scroll down to check your entry in the **Notes** field. Close the reference.

To add a note to some of the references which are visible in your window, hold down the **Control** key as you click on those references to which you wish to add a note in order to highlight them. On the toolbar click on **References**, **Show Selected References**, so that only those references to which you wish to add a note are visible. To add a note to these references, go to **Tools**, then **Change and Move Fields**. On the **Change Fields** tab, choose **Notes** from the drop down menu, then type in your note. Click on **OK**, and confirm when asked by selecting **OK** again.

To add a note to just one reference, double click on the reference to which you wish to add a note. This opens the reference and you can navigate to the Note field to add a note.

There are a variety of other fields that you can use to add information to your references e.g. keywords, Custom 1 etc.

3. Using groups

EndNote X4 also allows you to add references to groups. If you are using one library to work on several projects this can be a very useful tool. References can belong to more than one group.

Exercise 3

In EndNote, from the toolbar, click on **Groups**, then **Create Group**.

Under My Groups in the left hand column you will see an entry called New Group. You can overwrite this with your own group name, eg. kidney failure.

To add references to your new group select the references you wish to add by highlighting them (hold down the **Control** key as you click to select multiple references). If you wish to add all references visible in the window on the toolbar go to **Edit**, then **Select All**. Click on **Groups** in the toolbar, then **Add references to**. Click on the name of the group to which you wish to add the references you have selected.

You can also drag and drop references into groups, by highlighting them and dragging them with the mouse across the screen into a group.

To remove references from a group, open the group by clicking on it. Highlight the references you wish to remove, and from the **References** option on the toolbar, click on **Remove References from Group**. The references you remove from the group will remain in the All References part of your EndNote library.

4. Checking for duplicates

If you import from more than one set of results, you may end up with some duplicate references in your library. EndNote can help to remove them.

Exercise 4

In EndNote select the **References** menu and choose **Show All References.**

Again, select the **References** menu, then **Find Duplicates.** The Find Duplicates box opens. At the top of the box there is a message telling you how many duplicates have been found. The box then displays the duplicate items side by side, inviting you to select which one to keep. For the item you keep, click on **Keep This Record**.

If you want to delete all duplicates at once rather than individually, close the Find Duplicates box and any duplicates found will be highlighted in blue in the main window. To clear them all choose **Clear** from the **Edit** menu and confirm **OK** when asked. Use **References** > **Show All References** to display the de-duplicated contents of your library afterwards.

Note: EndNote will not always manage to find **every** duplicate reference - different formats for author names, page numbers and journal title abbreviations can all cause duplicates to be missed.

If you encounter this problem, either:
Sort the library by author or title to spot duplicates by eye
or:
Because EndNote identifies duplicates by looking for identical information in selected fields, you can try changing the fields it looks in by going to **Edit**, **Preferences**, **Duplicates** and ticking/unticking fields as required.

EndNote identifies duplicate references in a library as references of the same reference type with matching Author, Year and Title fields. It is possible therefore that one of the duplicates may contain more detail than another, and you therefore may have a preference as to which reference you keep.

5. Linking to PDFs and other documents

If you have a PDF copy of an article already stored somewhere on your PC, you can link it to a reference in your EndNote library and then gain quick access to that PDF from inside the EndNote record.

The easiest way to do this is to highlight the chosen reference, then right click and choose **File attachments > Attach file** and navigate to where you have saved the PDF file.

If you want to try saving a PDF article to your PC and then attaching it to an EndNote record, try this exercise.

Exercise 5

Go to the Library homepage: http://library.leeds.ac.uk

In the Search@Library search box, type `Science Direct`. On the catalogue results page, find **Science Direct** and click on Go to this resource. This will take you to the main search page for Science Direct.

Type into the "Quick Search" all fields box **`dinosaurs`** and click on **Go**.

Save one of the PDF files listed by using the right-mouse button to select the PDF link and choose 'Save Target As'. Save it to your M: drive, naming it **dinosaurs.pdf**.

Go back to EndNote. In your own library (or practice.enl library), highlight a reference. Right click on it, and choose file attachments, then attach file, the find the dinosaurs.pdf file and click on **Open**.

Important note: By default EndNote will make a copy of the file and place it in a folder associated with your EndNote Library. If you just want to link to the original make sure you untick the box marked "copy this file to the default file attachment folder and create a relative link"

EndNote will give an icon of the PDF document. Check that the document opens by double clicking the icon.

You aren't restricted to linking to PDF files, you could also link to Word files, Excel files etc.

Part D – Optional exercises

1. Exporting from Google Scholar

Note that you can only export references one at a time, so it is not suitable to support comprehensive literature searching.

You will need to update your preferences inside Google Scholar before you can send any references to EndNote.

Follow these steps to configure Google Scholar to send references to EndNote:

1. Go to the Google Scholar homepage at http://scholar.google.com
2. Click on the "Settings" link
3. Under "Bibliography Manager", select the option "Show links to import citations into" and choose "EndNote" from the menu
4. Click on the "Save" button

Follow these steps to import search results into EndNote:

1. After performing a search on Google Scholar, click on the "Import into EndNote" link for the reference you want to import
2. If you are presented with a window asking if you want to "Open" or "Save" the file, choose to open the file
3. A "Select a Reference Library" window will appear; use this window to select the EndNote library you want the reference imported into.

2. Exporting from the Library catalogue

See instructions for exporting from the Library catalogue on our website here http://library.leeds.ac.uk/skills-endnote - under the section 'Adding references'

3. Finding new and updated filters for exporting from databases

EndNote uses filters to help it interpret the references you import from other sources. You should check the EndNote web site for new/updated filters if you find that:

- the filter for the database you want to use is not working properly (information is missing from your references or being put in the wrong place)
- the filter you need does not appear in the list of choices at the point of import

Exercise 3

Before you download any filters, you need to create a folder called **filters** somewhere on your PC (e.g. M drive) – this is necessary because unless you are using your own personal copy of EndNote, you don't have permissions to save anything in the folder where all the other filters are.

From the Desktop, double click on My Computer at the top right of the screen. Select your M drive, then click on File > New > Folder and name it **filters.**

Now go to the EndNote web site at: http://www.endnote.com. Put your cursor over **Downloads** (at the top of the screen) and click on **Filters**.

The easiest way to find your filter is to type in the name of the database provider (e.g. type in OvidSP to find the latest filters for Medline, Embase or PsycINFO). Click on **Apply.**

Alternatively you can browse the list by Provider name to find the filter you want.

When you find the one you need, click on the **Download** link on the right side of the screen. Choose to **Save** it to the filter folder you just created.

Now, because this filter is not saved in EndNote's usual filter folder, you need to tell it to look in a new location when it's time to use this new filter.

Inside EndNote, go to **Edit** > **Preferences** and click on the **Folder Locations** option. In the centre of this new window, under **Filter Folder:** click on **Select Folder.**

Use the **Look in:** drop down menu to navigate to the part of your PC (e.g. M drive) where you created the filter folder at the start of this exercise. Navigate to the filter folder you created and then double click on it. Click on **Select** and then click on **OK.** When you come to download references from the corresponding database, EndNote will now look for a filter in your own filter folder.

NB Don't forget to change the folder location back to EndNote's original filter folder when you want to use the filters that come with the EndNote software.

4. Document templates

EndNote has a range of document templates you can use with Word to help you produce articles in the formats required by publishers. This combines well with the way EndNote can manage your references to speed up the submission of articles, as long as there's a template for the journal you are publishing in.

Exercise 4

In EndNote, select **Tools**, then **Manuscript Templates.**

Open the template for a journal you are interested in.

You can then either follow the steps in the Wizard to get started, or click Finish to edit the document manually.

You will see the different sections of the article laid out (title, abstract, etc) in the style of the journal selected.

Before submitting articles to publishers, or sending a document to a colleague who doesn't have EndNote installed you may need to click on the option to Remove Field Codes. This will remove EndNote formatting from your document, but leave the citations and bibliography intact. Once you have done this you will no longer be able to reformat the citation and bibliography format so you may wish to save a copy with the field codes intact first.

Appendix

Exporting from Cochrane Library, CINAHL and Popline

Cochrane Library

1. Carry out your search

2. Select the results you want to keep by either
   - ticking individual results and clicking on **Export selected** or
   - click on **Export all**

3. Choose your export options in the small window that opens
   - leave the Export type as PC
   - change File type to Citation and Abstract
   - click Export Citation
   - click Save
   - save the text file to your preferred location on your PC

4. Open your EndNote library (or create a new one File > New)
   - In EndNote, go to File > Import > File…
   - In the new box click on Choose… and navigate to where you just saved your text file
   - For Import Option choose Cochrane Library (Wiley) – if it doesn't appear as an option click on Other Filters in the drop down menu to find it
   - Leave the other two options as they are (or you can choose Discard Duplicates) and click on Import

CINAHL

1. Carry out your search

2. If you are inside an individual article's record or if you have added your results to the folder feature inside the database you can click on Export on the right of the screen

3. Choose the option: Direct Export in RIS Format and click on Save

4. EndNote should open and import your results automatically

Popline

1. Carry out your search

2. You can either export all your search results (but note there is a maximum of 1000 at a time) or add individual results to 'My documents' and export from there (personal account required, see http://www.popline.org/user). When you have decided, find and click on the appropriate RIS option (under 'Export search results' or 'Export My Documents').

3. Wait while your file is created. When the File download box appears, click Open.

4. Choose to send to EndNote if prompted to choose software. Click Ok.

5. EndNote should open and automatically drop your references into your existing EndNote library.