



EndNote X7

Advanced tips and tools

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Today's session



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- 1. Removing duplicate references**
- 2. Editing multiple references**
- 3. Changing Fields Display**
- 4. Search Endnote Database**
- 5. Finding Full Text**
- 6. Creating Groups**
- 7. Importing PDF Folders**



1. Removing duplicates

1. **Default Option** (Matching on Author, Year, Title)
Main Menu: **References > Find Duplicates**
To get rid of all the duplicates we need to de-duplicate several times comparing different fields.
2. **Advanced Option**
Main Menu: **Edit>Preferences>Duplicates**
Select the fields that you want to match

2. Editing multiple references



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1) Selecting references

Hold **SHIFT** and **down** to highlight a batch of **many references**.

Hold **Ctrl** & left click to pick out a **selection of references**.

2) Showing references

Right click on the references and select '**show selected references**'.

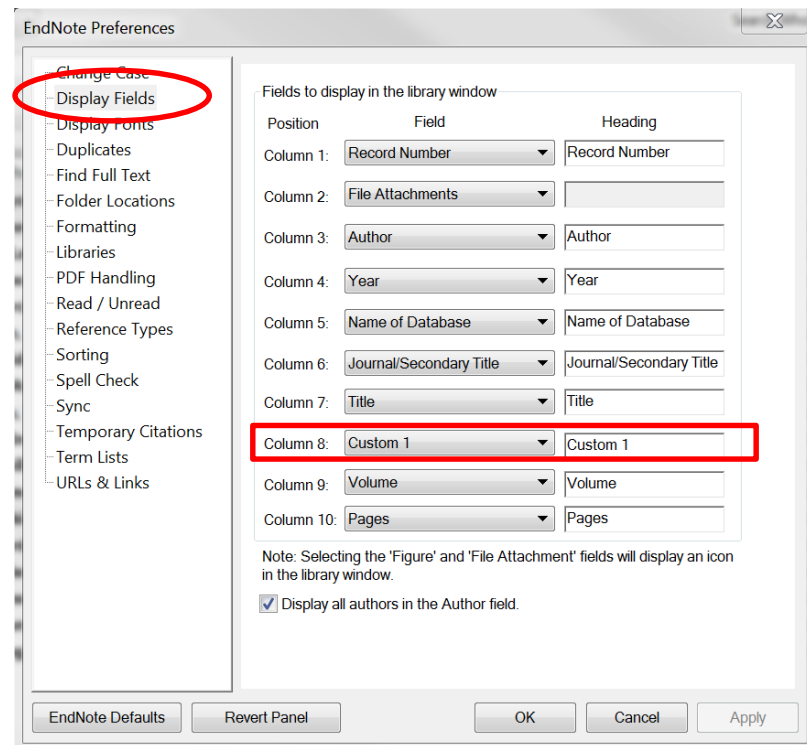
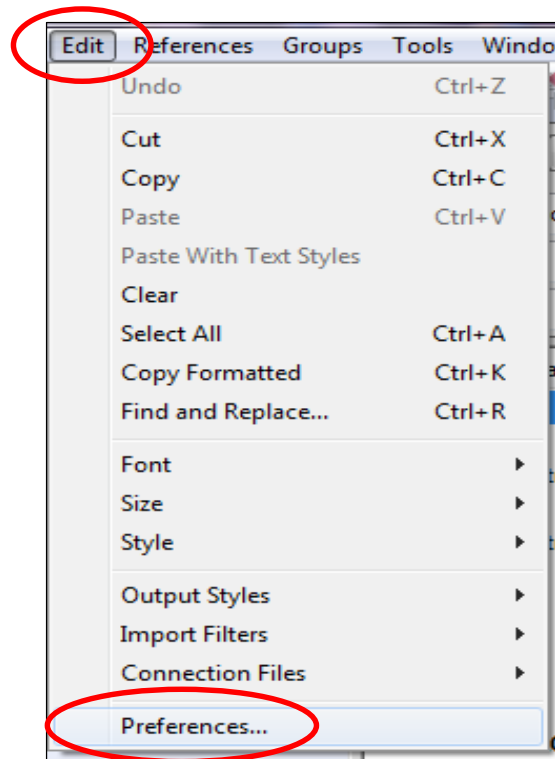
3) Main Menu: Tools>Change/Move/Copy Fields

If you select **Replace whole field with** this will completely **delete** anything that was already in the research notes field.

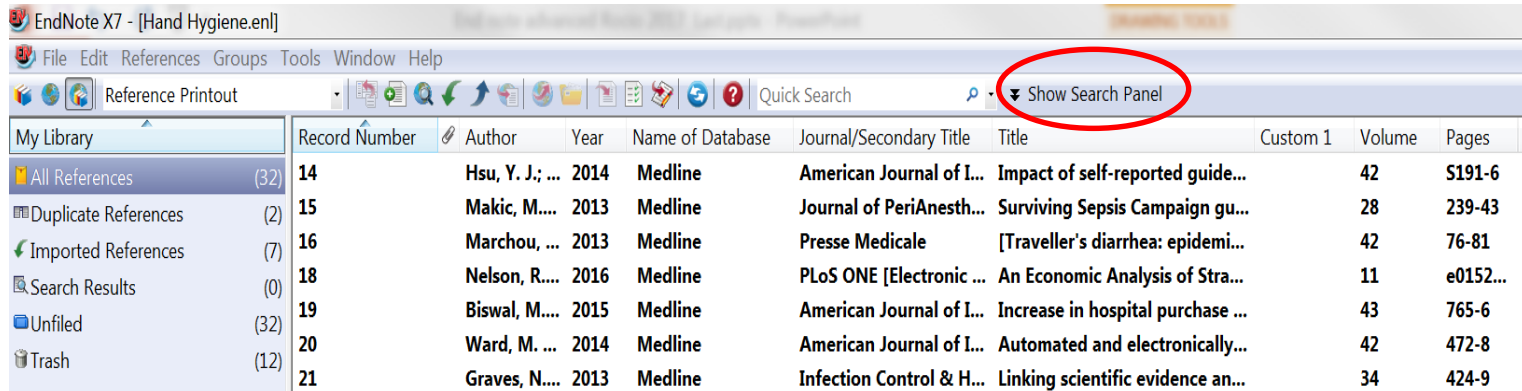
Insert before field's text or **Insert after field's text** EndNote or select **Clear field** if you wish to delete existing research notes. Type in your research note and click **OK**.

3. Changing Display Fields

You can decide which fields to display at the top of the screen.
Go to Main Menu **Edit>Preferences>Display Fields**.



4. Searching in EndNote

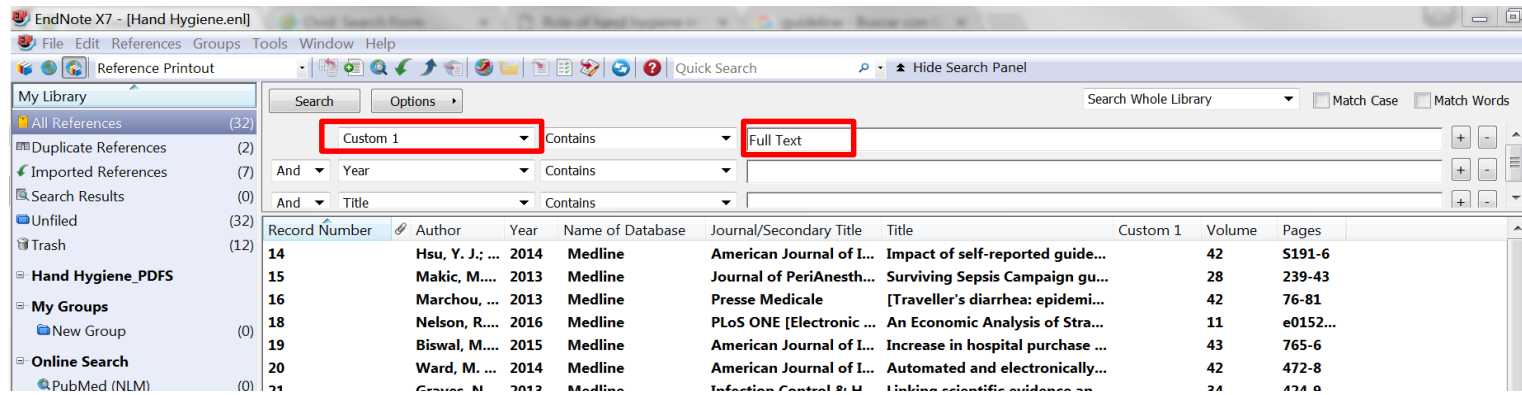


EndNote X7 - [Hand Hygiene.enl]

File Edit References Groups Tools Window Help

Reference Printout Quick Search Show Search Panel

My Library	Record Number	Author	Year	Name of Database	Journal/Secondary Title	Title	Custom 1	Volume	Pages
All References (32)	14	Hsu, Y. J.; ...	2014	Medline	American Journal of I...	Impact of self-reported guide...		42	S191-6
Duplicate References (2)	15	Makic, M....	2013	Medline	Journal of PeriAnesth...	Surviving Sepsis Campaign gu...		28	239-43
Imported References (7)	16	Marchou, ...	2013	Medline	Presse Medicale	[Traveller's diarrhea: epidemi...		42	76-81
Search Results (0)	18	Nelson, R....	2016	Medline	PLoS ONE [Electronic ...	An Economic Analysis of Stra...		11	e0152...
Unfiled (32)	19	Biswal, M....	2015	Medline	American Journal of I...	Increase in hospital purchase ...		43	765-6
Trash (12)	20	Ward, M. ...	2014	Medline	American Journal of I...	Automated and electronically...		42	472-8
	21	Graves, N....	2013	Medline	Infection Control & H...	Linking scientific evidence an...		34	424-9



EndNote X7 - [Hand Hygiene.enl]

File Edit References Groups Tools Window Help

Reference Printout Quick Search Hide Search Panel

Search Options Search Whole Library Match Case Match Words

Custom 1 Contains Full Text

And Year Contains

And Title Contains

Record Number	Author	Year	Name of Database	Journal/Secondary Title	Title	Custom 1	Volume	Pages
14	Hsu, Y. J.; ...	2014	Medline	American Journal of I...	Impact of self-reported guide...		42	S191-6
15	Makic, M....	2013	Medline	Journal of PeriAnesth...	Surviving Sepsis Campaign gu...		28	239-43
16	Marchou, ...	2013	Medline	Presse Medicale	[Traveller's diarrhea: epidemi...		42	76-81
18	Nelson, R....	2016	Medline	PLoS ONE [Electronic ...	An Economic Analysis of Stra...		11	e0152...
19	Biswal, M....	2015	Medline	American Journal of I...	Increase in hospital purchase ...		43	765-6
20	Ward, M. ...	2014	Medline	American Journal of I...	Automated and electronically...		42	472-8
21	Graves, N....	2013	Medline	Infection Control & H...	Linking scientific evidence an...		34	424-9

5. Finding Full Text



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Automatic PDF finder

To switch off/on the automatic full text finder go to:

Edit>Preferences...>Find Full Text>

tick/untick “Automatically invoke Find Full Text on newly-imported references”.

Find available PDFs.

Select References

Go to: **References>Find Full Text.**

Records with PDF attachments show paper clip symbols.



6. Creating Groups

Select References > Right Click > Add References to > Create Custom Group

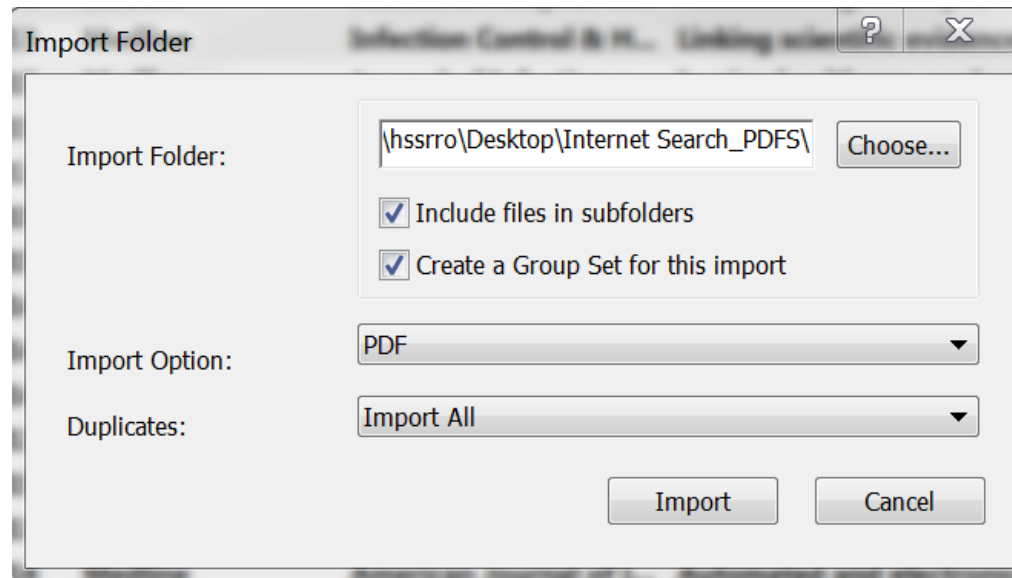
The screenshot shows the EndNote X7 interface with a list of references. A right-click context menu is open over the selected references, and the 'Add References To' option is highlighted, with a sub-menu showing 'Create Custom Group...' also highlighted.

Record Number	Author	Year	Name of Database	Journal/Secondary Title	Title	Custom 1	Volume	Pages
36	Akyol, A.; ...	2006	Embase	Journal	econ...	Need Full Text	62	395-405
21	Graves, N....	2013	Medline	Infectio	te an...	Need Full Text	34	424-9
27	McLaws, ...	2015	Medline	Journal	ers' p...	Need Full Text	8	72-9
19	Biswal, M....	2015	Medline	America	hase ...	Need Full Text	43	765-6
16	Marchou, ...	2013	Medline	Presse M				
23	Jain, S.; E...	2015	Medline	America				
26	Smiddy, ...	2015	Medline	America	E-mail Reference	erat...	43	209-74
29	McAteer, ...	2014	Medline	America	ry to...	Need Full Text	42	495-9
14	Hsu, Y. J.; ...	2014	Medline	America	uide...	Need Full Text	42	5191-6
28	McInnes, ...	2014	Medline	BMC Inf	rior ...	Need Full Text	14	611
31	Eveillard, ...	2013	Medline	Infectio	to u...	Need Full Text	34	447-8
25	Salmon, S...	2015	Medline	America	foc...	Need Full Text	43	1086-91
15	Makic, M....	2013	Medline	Journal	n gu...	Need Full Text	28	239-43
20	Ward, M. ...	2014	Medline	America	cally...	Need Full Text	42	472-8
18	Nelson, R...	2016	Medline	PLoS ON	Stra...	Need Full Text	11	e0152...
30	Person, B...	2013	Medline	PLoS ON	of ha...	Need Full Text	8	e74370
35	Chun, J. Y...	2016	Medline	America	ca...	Need Full Text	44	1486-...
24	Fung, I. C...	2015	Medline	Western	201...	Need Full Text	6	34-42



7. Importing Folders with PDFs

Main Menu: File > Import > Folder



If your pdfs are already grouped into subfolders choose "Create Group Set" so they can be identified

Further Help



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1) Leeds University library: <http://library.leeds.ac.uk/skills-endnote>
LU referencing output style, workbooks for self training ,help and advice

2) You Tube: <https://www.youtube.com/watch?v=lnqPjjKwEPkot>

3) AUHE

Mini master classes archive

http://medhealth.leeds.ac.uk/info/698/lihs_mini-masterclasses/1440/mini-masterclass_archive

Endnote resources

http://medhealth.leeds.ac.uk/info/639/information_specialists/2044/endnote_resources

Information Specialist advice clinics

30 min 1:1 sessions