



EndNote X7 Advanced tips and tools

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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



 <u>Default Option</u> (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



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.

Edit	References Groups	Tools Windo
	Undo	Ctrl+Z
	Cut	Ctrl+X
	Сору	Ctrl+C
	Paste	Ctrl+V
	Paste With Text Styles	
	Clear	
	Select All	Ctrl+A
	Copy Formatted	Ctrl+K
	Find and Replace	Ctrl+R
	Font	۱.
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	Import Filters	+
	Connection Files	+
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Display Fields	Fields to dis	play in the library window	
Display Fonts	Position	Field	Heading
Duplicates	Column 1:	Record Number	 Record Number
- Find Full Text - Folder Locations	Column 2:	File Attachments	•
- Formatting - Libraries	Column 3:	Author	✓ Author
PDF Handling	Column 4:	Year	▼ Year
-Read / Unread -Reference Types	Column 5:	Name of Database	▼ Name of Database
Sorting Spell Check	Column 6:	Journal/Secondary Title	▼ Journal/Secondary Title
-Sync	Column 7:	Title	▼ Title
Temporary Citations	Column 8:	Custom 1	Custom 1
-URLs & Links	Column 9:	Volume	▼ Volume
	Column 10:	Pages	▼ Pages
	Note: Select in the library		thment' fields will display an icon
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5. Finding Full Text



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

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Main Menu: File> Import >Folder

Import Folder	? X
Import Folder:	 \hssrro\Desktop\Internet Search_PDFS\ Choose ✓ Include files in subfolders ✓ Create a Group Set for this import
Import Option: Duplicates:	PDF Import All
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If your pdfs are already grouped into subfolders choose "Create Group Set" so they can be identified





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

2) You Tube: https://www.youtube.com/watch?v=InqPjjKwEPkot

3) AUHE

Mini master classes archive <u>http://medhealth.leeds.ac.uk/info/698/lihs_mini-</u> <u>masterclasses/1440/mini-masterclass_archive</u> Endnote resources <u>http://medhealth.leeds.ac.uk/info/639/information_specialists/2044/endno</u>

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Information Specialist advice clinics

30 min 1:1 sessions