

# **USER GUIDE FOR ScHARR STAFF**

**May 2017**

## **An introductory guide to using Endnote for SchARR Staff and Students**

### **Contents**

What is Endnote? .....	1
Creating a Library .....	2
Creating a library for personal use.....	2
Creating a shared library.....	2
Sharing a library with others.....	2
Opening a library that has been shared with you.....	3
Sending your Endnote library to other people .....	3
Adding references to your library .....	4
Manually entering references into your library.....	4
Importing PDFs into your Library .....	5
Importing references from bibliographic databases .....	6
Importing references from other reference software .....	6
Copying references from one library to another .....	6
Managing your library.....	7
Adding keywords and labels .....	7
Managing your keywords.....	8
Removing duplicate references .....	8
Groups and Smart Groups.....	9
Find full text feature .....	10
Searching within your library .....	11
Using Endnote to search the web for references .....	11
Exporting references into Microsoft Word / Excel .....	13
Generate Inter Library Loans (ILLs) .....	13
Using Endnote for reviews or report writing .....	14
Using Endnote for review projects.....	14
Sifting tips for reviewers .....	14
Inserting citations directly into your report.....	14
Creating a PRISMA diagram .....	16
Creating a bibliography .....	16

# What is Endnote?

EndNote is a tool for collecting, storing and managing bibliographic references. You can then include your references in academic writing and automatically reformat them for different referencing styles.

## For taught students:

The Library recommends EndNote Online for taught students and new users, and provides a set of web pages explaining how to use it at:

<https://www.sheffield.ac.uk/library/refmant/endnoteweb>. EndNote Online is web-based and available without charge to all members of the University of Sheffield. **For full Endnote Training Guide see** <http://endnote.com/support/online-user-manual/x7>

## For PhD students and staff:

However, PhD students and ScHARR staff working on large-scale research projects are likely to need to use the [desktop](#) version of EndNote which provides more functionality, a greater range of output citation styles, and allows for sharing within teams.

Currently, the desktop version of EndNote is only licensed for use on campus, though it is possible to purchase a personal copy for home use.

This guide aims to introduce you to the features of EndNote; if you have suggestions for additions or corrections, please contact one of the team who created it (Andrea Shippam; Gill Rooney; Mark Clowes; and Louise Preston). If you need urgent advice on EndNote issues not covered here, you could try the EndNote forums at: <http://community.thomsonreuters.com/>; alternatively, Liam Bullingham, the University Library's resident EndNote expert, can be contacted at [l.bullingham@sheffield.ac.uk](mailto:l.bullingham@sheffield.ac.uk).

# Creating a Library

## Creating a library for personal use

Open EndNote.

Go to 'New'

Give your library a name and choose where it will be saved.

When you create your Endnote Library, there will be two separate items created – the Endnote Library itself e.g. *LibraryTitle* and a folder which is called *LibraryTitle.Data*

## Creating a shared library

You may wish to do this if you are working in a project team or if you wish to share your library with colleagues. EndNote desktop libraries (or groups of references within them) can be shared using EndNote Online. However, you can only have one EndNote online library per e-mail address; so rather than syncing an individual's personal library with that of all their colleagues, it may be preferable to set up a new shared library associated with a generic e-mail address for the project.

For SchARR-TAG projects, a shared library will be set up by the project managers (Andrea Shippam and Gill Rooney). All team members will receive an e-mail invitation to this library.

Anyone else wanting to create a generic e-mail address for a project can do so via CiCS at: <https://www.sheffield.ac.uk/cics/account/requestgeneric/index>

You will then need to set up an Endnote online account for the project with the project (generic) e-mail address. Then create an Endnote library using these credentials and share with the project team.

## Sharing a library with others

Before you can share a library with others, you have to sync it with the cloud.

- Open the Library and go to <Edit> <Preferences> <Sync>.
- Enter the “**EndNote Account Credentials**” of the account you want to share (if you haven't set up an EndNote Online account you need to create one). Then click “OK” to save the details.

After doing this click on the “Sync” button on the toolbar. This will upload the library to its EndNote Online account. While this is taking place a green progress indicator will be displayed in the bottom right of the screen.

Once synchronization is complete, click on the “**Share Library**” button on the toolbar. Then enter the email address for each person you wish to share with, together with a message telling them about the shared library you are setting up.

Each member will receive an email (from noreply@endnote.com) inviting them to join the shared library, by following the link in the email.

If you later decide you want to **stop** other users accessing the library you can do this via the “**Share Library**” button.

#### **IMPORTANT: Reference Identification in EndNote**

Unlike Reference Manager which applies unique ‘Reference ID’ numbers to references, regardless of who is looking at the reference, when Endnote applies a ‘Record Number’ to your reference, this record number will differ depending upon who is looking at the reference – for example, Smith (2003) may be Record Number 272 in the library when accessed by one person and record number 343 in the library as accessed by someone else working on the project.

**This only applies when you are sharing a library.**

#### **Opening a library that has been shared with you**

You will receive an email (from [noreply@endnote.com](mailto:noreply@endnote.com)) inviting you to join the shared library, by following the link in the email.

When you follow this link, you will be asked to verify yourself by logging into your EndNote Online account. You can then return to EndNote desktop.

In EndNote go to <File> <**Open Shared Library...**> and any shared libraries you can access will be displayed in a dialogue box for you to select.

Once you have selected a library, EndNote will download the contents of this Online account into a new library on your desktop by using Sync.

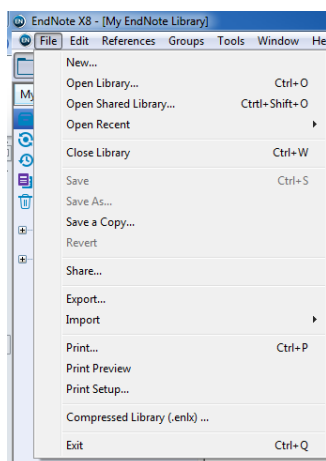
When synchronization is complete, you will have full access to the shared library. Any changes you make will be sent back to the Online Account when the Sync is run. At the same time, any changes made to the library elsewhere will be transferred to your local copy of the library.

Before clicking the “**Sync**” button, ensure no edited references has the focus. If one did have the focus and unsaved edits had been made, these would not be received.

#### **Sending your Endnote library to other people**

If you want to send your library to others via e-mail (rather than sharing it online), you will need to compress your library; this gives you just one file (*LibraryTitle.enlx*) to send via email etc.

Choose the “Compressed Library” option (under the File menu). Remember - this is effectively creating a copy of the EndNote library, so any changes made by the recipient will not be reflected in the master version. If ongoing collaboration is likely to be required, it is much better to create a shared library following the instructions above (Sharing A Library With Others).



## Adding references to your library

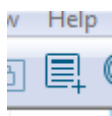
References can be added to your library in a variety of ways. In this guide we will show you how to

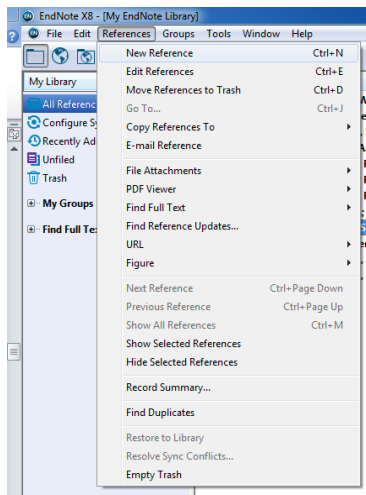
- Manually enter references into your library
- Import PDFs into your library
- Import references from bibliographic databases
- Import references from other reference software
- Copy references from one library to another library.

### Manually entering references into your library

While it is much quicker to populate your library from database searches, sometimes you will want to manually input known references or those identified manually via reference lists. To do this:

Select <**References**> then <**New Reference**>, or press <**CTRL+N**> on the keyboard, or use the add new Reference button.





Choose the “**Reference Type**” by scrolling through the list.

Insert the “**Authors**” in the format: Graham,J.

After inserting the first Author press <ENTER>, then insert the second name on a separate line, and so on.

Please note that if you need to enter an organisation as the Author, type it exactly like you want it to be seen in Word and add a comma at the end. If you do not enter authors/organisations in this format, they will not be displayed correctly in your bibliography.

Insert the “**Year**”, “**Title**”, “**Journal**”, “**Volume**”, “**Issue**” and “**Pages**” (xx-xx).

Using **Keywords** will help you to identify groups of references at a later stage (see: Managing Your Library in the next chapter).

Insert the “**URL**” if you have one.

You can use the “**Caption**” field to indicate whether you have already obtained the full text; for SCHARR-TAG projects the tags used are “*In File*”, “*Not In File*”, or, if an inter-library loan has been ordered, “*On Request*”.

To save your new reference, click on <**File**> then <**Save**> or <**Control S**>.

Exit the “**Reference Edit**” window by clicking the “Close” (x) button in the top right-hand corner of this window.

## Importing PDFs into your Library

Many research projects are inspired by a specific paper; you may also have conducted some informal Google / Google Scholar searching around a topic at an early stage, for scoping purposes.

If you have already downloaded PDFs which are likely to be relevant to the project, you can import these from the File menu. (File – Import – File – Choose...). EndNote will attempt to create a record for each one; though how successfully it does this will depend on the formatting

of the document. You may have to update the record manually (see above instructions on manually entering references).

## Importing references from bibliographic databases

The most efficient way to populate your library with a large volume of references is to import records directly from a bibliographic database.

The University Library maintains a set of web pages about EndNote and these include current information about compatibility with the databases it provides:

<https://www.sheffield.ac.uk/library/refmant/databases>

In some cases, direct export is possible; in others, it is necessary to download your results as a file in .txt or .RIS format and then import this into your EndNote Library. You may also prefer to download your results as a separate file for your records, especially if you are required to report your search process as would be the case for a systematic review.

## Importing references from other reference software

As Reference Manager and Endnote are now owned by the same company, instructions have been provided on how to do this – see <http://endnote.com/support/faqs/endnote/import>

The University of Washington Library have provided some (unofficial) guidance on exporting from Mendeley <http://guides.lib.uw.edu/c.php?g=99194&p=642698>

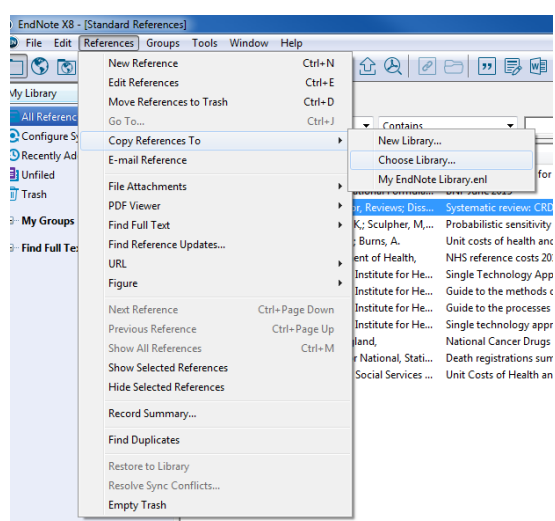
## Copying references from one library to another

Open up both libraries.

Select the reference(s) you want to copy.

On the reference tab at the top select “copy reference to”

Select the library you want to copy into. The reference(s) will then be copied across and appear in a new group in the new library called “copied references”.



If you are sharing the library, click “**Sync**” to send this change to the others sharing the library.

Check you all see the additional reference(s).



# Managing your library

## Adding keywords and labels

You may wish to add your own keywords to records in your Endnote Library to help you retrieve them quickly at a later date. How you choose to do this is for your project team to agree, but it is common to use the “Keywords” fields for this purpose.

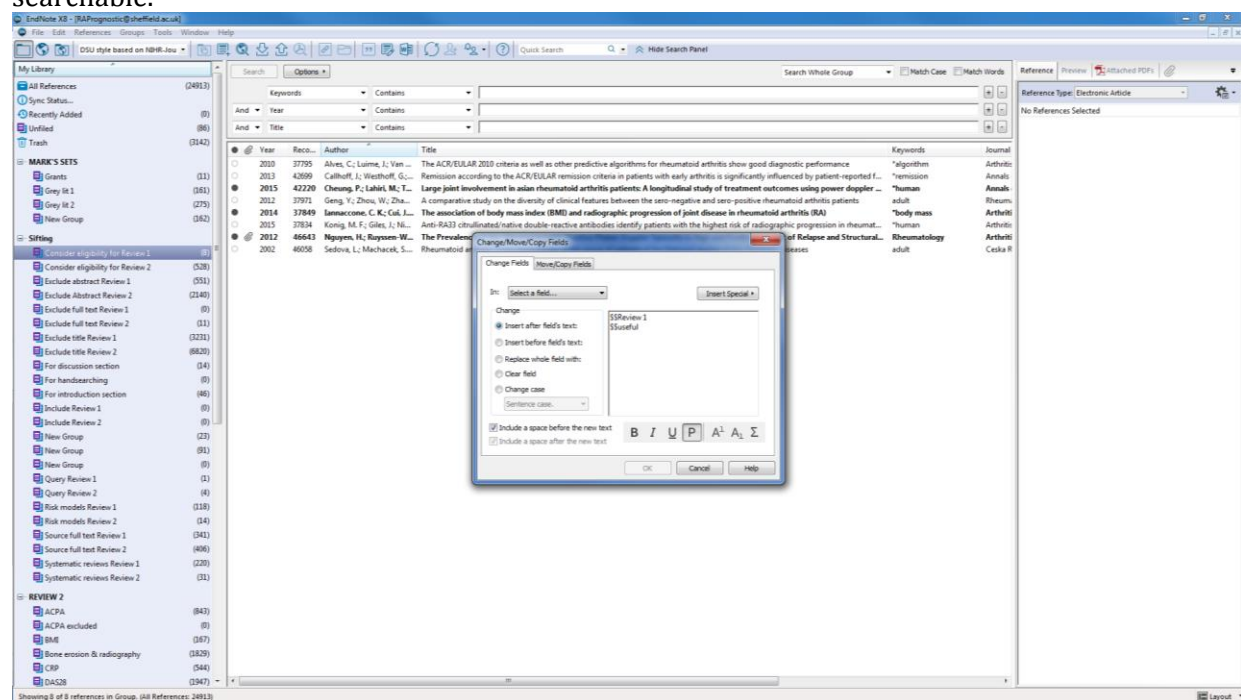
### To add a label

If, for example, you wanted to label all the records which had been retrieved from Web Of Science, you could add a tag “\$\$WoS” or similar (using the “\$\$” symbol helps to differentiate your tag from any keywords which might already be present in the record). To find these records at a later stage, all you would have to do is run a search.

You might also use keywords when sifting through records, labelling those which meet your inclusion criteria with “\$\$Include”.

To add a keyword to a large number of records simultaneously, first you need to create a discrete group of all the records you want to label. If you have just imported them from a database, they will automatically be grouped together in a set called “Imported References” (you can find this in the menu on the left hand side of the screen). If you need to create a group based on other criteria, you will need to use “Search” (located under the Tools menu) to identify them; then you can perform your labelling function on your “search results”.

To add a tag to your full set of search results, click on ONE of them to highlight it. Then, go to Tools – Change/Move/Copy Fields. After each label or keyword you add, make sure you enter a carriage return - this will ensure that it is kept separate from other terms and remains easily searchable.



Choose the field into which you want to add your keyword(s).

It may be helpful to add your terms *before* any others which are already in that field (in which case, include a space afterwards); or you may prefer to add them at the end (in which case, add a space before). **Remember to press 'Enter' (carriage return) after each keyword.**

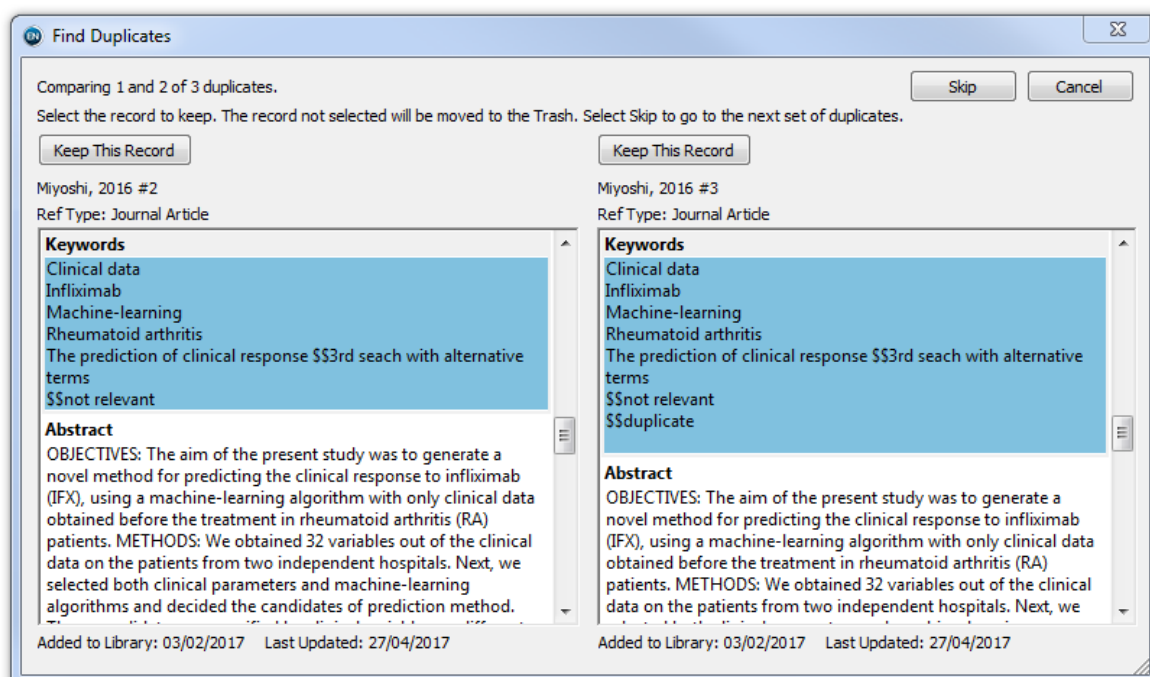
## Managing your keywords

Often when people tag references in Endnote, they like to use a predefined list of keywords e.g. '\$\$louse-include-diabetes' and have a number of different keywords to add. Some reference management software will autocomplete your keywords for you when you are adding them into the Keywords field. Endnote does not do this, but it is possible to retrieve a list of the keywords you have added by going to **'Tools'** and selecting **'Open terms list'** and then a list of the terms that you have added will then appear so you can check what you have used. The keywords will now automatically autocomplete when you are typing in the keywords field.

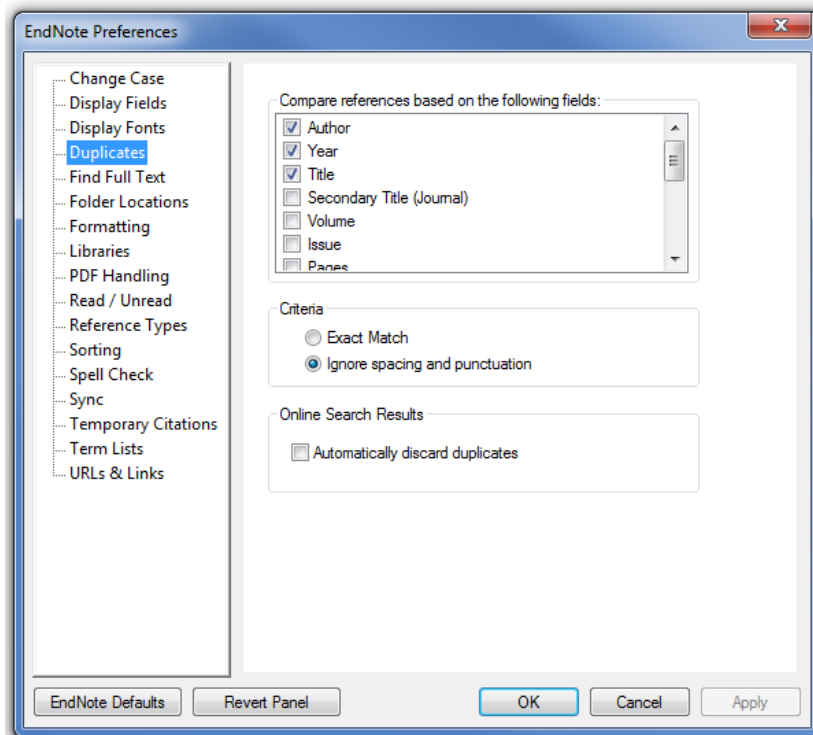
## Removing duplicate references

There are a number of ways of removing duplicates from your EndNote library. Unfortunately, the automatic duplicate checking facility only works well if all the references have been entered in a similar format. Since this is not usually the case, it will be necessary to supplement this with a manual check for duplicates.

To run the automatic checker, select **<References> <Find Duplicates>**. This will display a dialogue box, either saying there are none, or showing the pairs side by side so you can resolve them (there is also a **"Duplicate References"** group created). When they are side by side, any differences are highlighted and you can decide which to keep. You can also drag and drop any missing information from one side to the other.



You can alter the fields used to compare possible duplicates, e.g.: page number, to help you identify true duplicates. To alter the settings, select <Edit> <Preferences> <Duplicates>. Select all the boxes you would like to scan e.g.: start page, volume number, etc. You can mark as many or as few as you like. Sometimes it is easier to just have Title and Authors checked as this gives you less restriction (but you may find multiple outputs from the same study e.g. a conference abstract and then a peer-reviewed article). When finished with changes, click <OK> to save.



Behind the dialogue box, in the "**Duplicate References**" group, EndNote highlights the references **it** thinks are duplicates. It is best not to delete these highlighted references but to use the dialogue box to make educated decisions on possible duplicates.

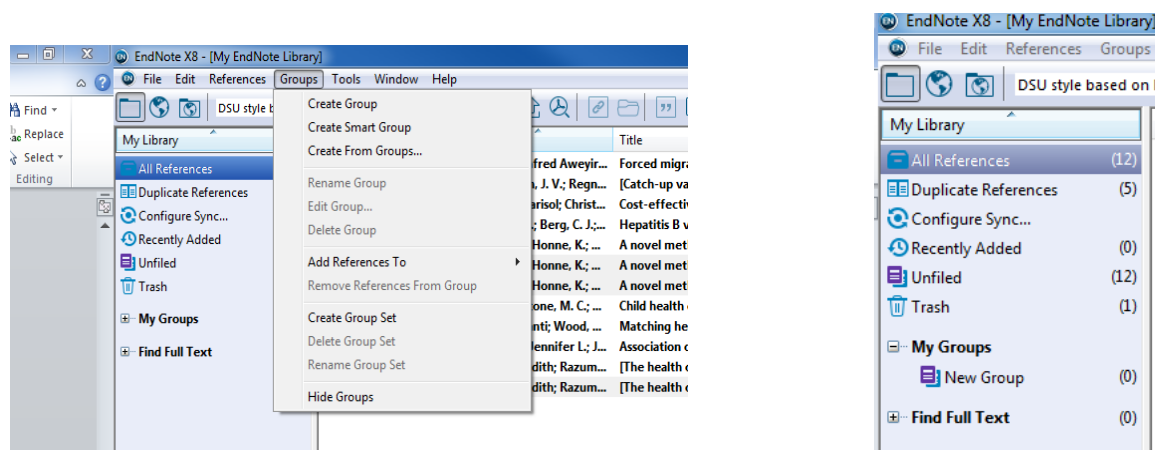
When you have finished identifying and removing true duplicates and leaving the false duplicates (by clicking the "**Skip**" button), the dialogue box will close. The "**Duplicate References**" group will be displayed, showing the false duplicates, this can be closed by right clicking on the group name and selecting "**Delete Group**".

Once you have finished removing duplicates, it is still wise to actually scan the references manually as some of the duplicates are not picked up by the automatic check because they are slightly different. To do this, you need to sort by Author on the main database, by clicking "**Author**" at the top of the column in the reference list area. This may take several seconds, depending on the amount of records in your library. Another useful check would be to sort by Title.

## Groups and Smart Groups

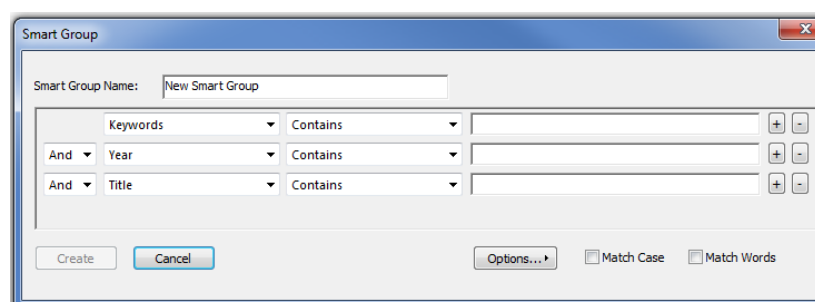
You can create as many Groups as you like to manage your references. References are manually filed into groups and you can add them to more than one group. If you wish to *move* a reference from one group to another, please remember to delete the record from the first group – otherwise it will simply be copied across.

The **All References** number stays the same even though you are moving references to the different groups and the **Unfiled** number shows you how many are still to be added to a Group.



## Smart Groups

Smart Groups automatically put records with certain pre-defined terms into the group – e.g. a certain keyword. You create the definition of your Smart Groups.

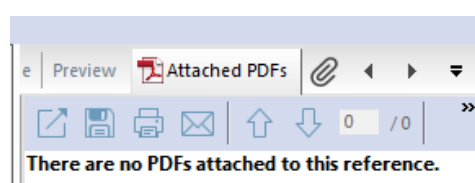


## Find full text feature

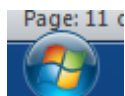
Endnote has a “Find Full Text” feature. This means that when you insert a reference into Endnote, it will automatically search the web for a PDF version of the reference and add the PDF to your library. This process happens every time that you open the library - Endnote will search for the full text of any articles that do not have a PDF attached. This can be a very useful feature, however when you have a large library, this feature will slow down the functionality of Endnote.



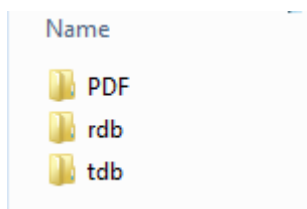
When Endnote has found PDFs of papers in your library it indicates this by adding a little paperclip next to the reference. It is possible for you to manually add PDFs into the library, if you wish to store them within your Endnote library. To do this you click on the attach “PDFs button” to the right of the screen and then click onto the paperclip next to it. This allows you to search for the relevant paper, in much the same way as adding an attachment to an email.



Similarly, if you have a very large library, you may wish to detach all the papers and store them somewhere different as a lot of attachments may make the library run slowly. To do this go to Windows File Manager,



and select the location of your Endnote library. Open up the Data folder and then select the "PDF" folder for the library.



In the search box (top right), type in "\*.pdf" this will search for all pdfs from this letter down. Once the search has completed, select them all, copy them, then paste where you need them. Then delete them from the folder in the Endnote Data folder. NB: this won't work for shared libraries – this will need to be done by the person who shared the library with you.

### Searching within your library

Make sure you are in the <All References> group, and click the “Show Search Panel” button (top right).

In the first drop down box select the field you wish to search, e.g. “**Keyword**”.

Leave the next column as “**Contains**”, then add the search term into the last column, e.g. “**\$\$Medline**”.

Search		Options ▾		Search Whole Library ▾		<input type="checkbox"/> Match Case <input type="checkbox"/> Match Words	
	Keywords ▾	Contains ▾	\$\$Medline				+ -
And ▾	Keywords ▾	Contains ▾	\$\$RCT				+ -
And ▾	Title ▾	Contains ▾					+ -

Within the Search window you can perform more complex searches, by combining different parameters together using the drop down boxes for Boolean logic (AND/OR/NOT) and the tick boxes for “**Match Case**” and “**Match Word**”.

Click on the “**Search**” button or press [Enter] on the keyboard.

The results are displayed in a new group, called “**Search Results**”.

### Using Endnote to search the web for references

If you are using Endnote on a computer which is connected to the internet, you can search using the Endnote search interface to locate references that are not already stored in your library.

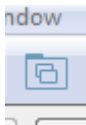
This is no substitute for comprehensive searching on a database (e.g. Medline) but it can help to fill gaps or quickly find the full details and abstract of known papers.

Select the Endnote Online search button from the toolbar



Choose a database (if in doubt, 'PubMed' is a good bet) in the Groups panel. Then fill in the Endnote search fields, remembering to select the type of field that you want to search (e.g. author, title etc). When you search, a dialog box will give you the number of records retrieved from your search. You can decide whether to retrieve these references or refine your search.

The references retrieved will be stored in a temporary library and need to be moved to one of your permanent libraries or groups, by using the 'Copy to Local Library' button.



## Exporting references into Microsoft Word / Excel

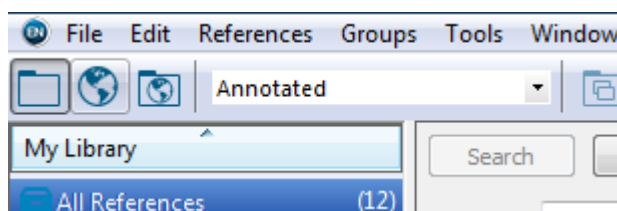
### Exporting references into Word

To get a list of records with title and abstract from your EndNote library, select the references that you want (either via a search and “Edit” “Select All”, or “Control A” or by individually selecting the appropriate references) by Control and clicking on desired references. You may wish to do this to create a Word document for sifting, or to create a list of references or bibliography, without using Cite While You Write.

Go to the style drop down box and Select Annotated

Go to **“Edit” and “Copy Formatted”**

Open Word document and then paste **“CTRL+V”**



### Exporting references into Excel

You may wish to import your Endnote Library to EXCEL for sifting or other purposes. The best approach for this is to get a list of records with title and abstract from your EndNote library, select the references that you want (either via a search and “Edit” “Select All”, or “Control A” or by individually selecting the appropriate references) by Control and clicking on desired references.

Then Go to the style drop down box and select ‘Tab delimited’ and save the file. Then open EXCEL. Go to File / Open then choose the file you saved from Endnote. The Text Import Wizard will open. Keep all the settings as they are. More information is available at

<https://www.youtube.com/watch?v=FTdy1BOg2KQ>

### Generate Inter Library Loans (ILLs)

From your EndNote library, select the references that you want to request (either via a search and “Edit” “Select All”, or “Control A” or by individually selecting the appropriate references) by Control and clicking on desired references.

Go to the style drop down box on the toolbar and select the “ILL Merge” style from the list

*If you do not see this style, you may need to copy the file “[ILL Merge.ens](#)”\* to*

*C:\Program Files (x86)\EndNote X7\Styles.*

Go to **<Edit> <Copy Formatted>**. This copies the selected references into the Windows clipboard in this special style. You will then need to open the “[ILL Merge List.xlsx](#)”\* Excel file. Put your cursor in cell “A2” and paste by pressing **“CTRL+V”**. The reference data should appear in the correct columns.

You then need to use this data to populate the [Article Request Form](#)\* using Mail Merge in Microsoft Word.

\*All these files are linked from

[https://www.sheffield.ac.uk/scharr/sections/ir/library/library\\_services](https://www.sheffield.ac.uk/scharr/sections/ir/library/library_services) under “Reference Management”

# Using Endnote for reviews or report writing

## Using Endnote for review projects

Before you start a review project, it would be worth agreeing the following with your research team

- Keywords - Where these keywords are going to be entered (keywords field or labels field) *Note: we have had some issues with libraries becoming corrupted and EndNote recommended this was less likely to happen if we all use keywords NOT labels.*
- Ensure that there is a keyword for all references retrieved and how these references were retrieved to facilitate the PRISMA statement.
- Standardise your approach to duplicate references (tag these as duplicates? put in the bin and leave them there? move to a duplicates group? remove permanently from the database?)

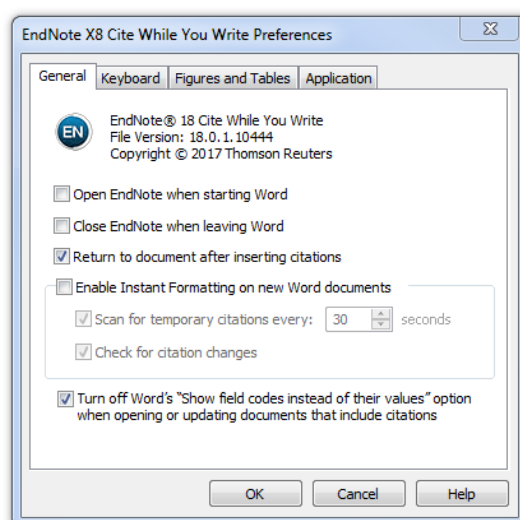
## Sifting tips for reviewers

- By default, you will see a grey dot next to each record in your EndNote library. This is the “Read / Unread” indicator and can be used to indicate quickly whether you have already viewed that record. You can also sort a group of records, or your whole library, according to read/unread status.
- If you are sifting within EndNote, you may find it helpful to change the columns which are displayed. Go to **Edit / Preferences** and then select “Display Fields”. If you want to change display fonts, these can also be modified from the same menu.

## Inserting citations directly into your report

Please use ‘*Cite While You Write*’ (CWYW).

Before starting ensure “**Enable Instant formatting**” is “**unchecked**”.





Open your Word document and click the **“Insert Citation”** button.

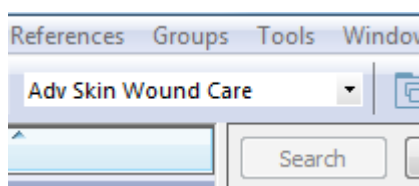


Type 'Author' and click **“Find”**.

Choose the correct reference from those displayed and click **“Insert”**.

If you wish to cite more than one reference in the same place, simply select them all from the list and click **“Insert”**. If you have already inserted one, then want to add another to it, make sure your cursor is adjacent to the last one already cited and insert the other one. Then tidy up the citation so it looks like **“{Graham, 2004 #35;Grem, 2004 #24}”**. Note the single set of **“{”** and the **“;”** to separate citations.

To change the citation style choose the **“Style”** drop down box on the EndNote ribbon. If the style you require is not in this favourites list, select **“Select another style...”** and pick it from the full list.



Click on Update Citations and Bibliography to produce a reference list. Make sure that the Font and Size corresponds to that of the rest of the document. (The reference list will take on the formatting of the last line of the document, so make sure that before you insert any citations, the last line is normal formatting, not a heading.)

If you need to remove a reference for any reason, you need to put your cursor on the citation and go to the **“Edit & Manage Citation(s)”** button. In the list that appears, select the citation you wish to remove from the document, click on the black triangle on its right edge and select **“Remove Citation”**. When you click **“OK”** the dialogue box will close and the document will update.

If you notice an error in one of your references you can correct this by going to **“Edit & Manage Citation(s)”**. Find the reference you wish to edit and click **“Edit Reference”**, this will open the reference in EndNote Desktop where you can edit and save it before returning to Word. Finally click on **“Update Citations and Bibliography”** to apply the changes you have made.

If you require further assistance with inserting EndNote citations into Word, CiCS have provided some 'EndNote Tips' in response to frequently asked questions:

<https://www.sheffield.ac.uk/cics/endnote>

## Creating a PRISMA diagram

If you are using the **PRISMA** reporting system (<http://www.prisma-statement.org/>), you might find it useful to create a group for each of the stages of the flow diagram, starting with the number of citations identified by the searches, following deduplication. In the group add all of the relevant citations. Then, for each subsequent stage of PRISMA, create an appropriately named group in which to copy references from the total number of citations folder. Copying citations in and out of these folders as decisions are made regarding study inclusions will facilitate putting together the final PRISMA flow chart for your review.

## Creating a bibliography

As you enter references into your report using Cite While You Write, EndNote will automatically create a list of these at the end of the document, organized in alphabetical or numerical order depending on which output style you have selected. (You can reformat this list at any time by using the pull-down menu and clicking on "Update Citations and Bibliography".)

Should you wish to include items in your bibliography which you have read but not cited, simply add these to the document in the usual way, then right click on the citation and select "Edit citation" then "Show only in Bibliography".

If you require further assistance with inserting EndNote citations into Word, CiCS have provided some 'EndNote Tips' in response to frequently asked questions:

<https://www.sheffield.ac.uk/cics/endnote>

**Andrea Shippam, Gill Rooney, Mark Clowes, Louise Preston and Suzannah Bridge**

**May 2017**