

Managing Your Endnote Library

including Sorting, Searching, and Using Custom Fields

Why one big library?

I recommend one big library as your working library. You can only have one library open at a time with your Word document. You can code appropriate Endnote records for your comprehensives questions (quest1, quest2, etc.) or dissertation chapters (chap1, chap2, chap3, etc.) or grant proposals (nih852) or class readings (elan8000, etc.) or book chapters (chap1, chap2, etc.) or journal article (amjpubhealth). Thus, you can always bring the references you intend to include in the particular writing task into your working library subset with a search for the coded records, but they retain the original Endnote record number. Then if you need to combine the chapters or questions or whatever into a long document with only one bibliography instead of the bibliography for each separate chapter or question, you can easily do so without conflicts among multiple libraries. I will teach you how to create codes that are meaningful to you!

If you want to use Endnote to evaluate your search results from a GALILEO database in the Preview Pane, Annotated style which is the citation plus abstract, you can create a second library called To Review, or Downloaded or Temporary for a "pass through" analysis before being deleted as out of scope or cut/paste into your big library.

List view

Preview pane

Style window

Individual Endnote record -

View variety of reference formats supported by clicking down arrow beside Reference Type on a new Endnote record

Look at the fields in an Endnote record

Navigation arrows to move from record to record, forward or back

Link To and Open Link options

Sort options for List display

Prioritize your sort and click OK to save

In List view, click Header bar to change sort temporarily

To add another component to List view (so you can see it), Preferences/Display Fields -- ie. add Journal Title or a custom field like My Comments

Search the Endnote Library

Use arrow for dropdown list of fields in which you can focus your search

Add more search boxes if necessary

Always list the OR'd terms first, then AND term - ie. foot OR paw OR leg AND dog

Search is character string so you don't have to use truncation symbol

To integrate your subset back into your Endnote library, press Ctrl-M (merge), otherwise the entire library will close as it rebuilds and you'll have to reopen it (but don't worry if you close the library accidentally, you won't lose anything).

Use Custom Fields to exploit Endnote's flexibility for your needs

Edit/Preferences/Reference Types in left menu/Modify Reference Types - add Custom fields in records such as

1. text excerpt - use Endnote to store definitions, methods which you can quickly plop into your paper as you write..
2. my comments - jot down a few thoughts while the paper's contents are fresh in your mind
3. my grants/projects/courses/

Alphanumeric "codes" can be used to annotate info such as paper(s) read for a certain class, ie. ELAN8000, or papers cited in your grant proposal NIH852. I love alphanumerics because you can search for them in Any Field (but you have to remember the alphanumeric you use <smile>).

For comprehensive exams or thesis or dissertation writing when you may choose to create a separate document for each question or chapter, I recommend you add a custom code to the Endnote records you intend to include. This will be searchable like quest1 or quest3 or chap4 or chap5 and you can always create a subset of your big Endnote library containing records that are pertinent to the Word document you have open. You can put your code into a custom field or into Keywords or Label field.

Ordinary words you use in custom fields will probably require you to point to that custom field when you search the term

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