

STANDARD OPERATING PROCEDURE

Using the Schmidt Lab's Universal EndNote Library

Transitioning a document to the Universal Library

This procedure assumes that your local libraries have previously been Imported into the Universal Library in the Dropbox.

1. Unformat the document's citations, using Unformat Citations, thereby displaying all citations in the braces format {author, year #unique number}.

Note – In cases where multiple references exist with the same first author and year, you can change the unformatted citation to the form: {author, year, **keyword**}, using a rare word from the title. This will either avoid being prompted by EndNote to confirm these references, or will help make it clear to you which one to choose if EndNote does prompt you to choose.

2. Open the Universal library from the Dropbox, and close all other libraries.
3. Format Bibliography. EndNote will find the correct references with new unique identifier numbers, and prompt you to confirm each one in sequence. When there are multiple choices, carefully choose the correct one.

Adding references when the Universal Library is being used by somebody else

Even when an EndNote library is in use by someone else, EndNote still allows you to open the library as your own copy.

1. From the Dropbox, open the Schmidt Lab Universal Library in EndNote.
2. Copy your PubMed search references to your opened copy of the Universal Library, as normal. The Dropbox icon symbol will change and the popup prompt will tell you that Dropbox cannot update the Dropbox file because it is in use. That's okay.
3. Go ahead and use your updated copy of the Universal Library to insert new citations into your document.
4. Leave your copy of EndNote running, with the Universal Library still open. Once the other person is finished, Dropbox will update the file with your changes. You

don't have to be there or do anything, except leave the program running until it's done. When completed, the Dropbox pop-up will say "all files up to date."

Alternative method

1. Create a temporary library from which to insert your citations, or simply insert the citations into your document directly from the PubMed search list. Save the temporary library or a copy of the PubMed search results (.enl file), or simply keep open the PubMed search results.
2. ***Do not use*** Format Bibliography. Leave the new references unformatted. You can work with your new references in the form: {author, date, **keyword**}. A rare word from the title is best. You can type this in manually from scratch or by editing the #identifier in the unformatted citation. Doing this is optional, but can make it easier to update the references from the Universal Library later.
3. When the Universal Library is no longer in use, add your new references from the temporary library or PubMed search list. Either **Copy** the references from the open PubMed search results, or **Import** the saved temporary library file (select Discard Duplicates).
4. Open only the Universal Library. Close all other libraries.
5. Format Bibliography. With the keyword method, the new references will be usually be updated automatically. Without the keyword method, EndNote will prompt you to confirm each reference as it finds it. If it lists multiple references, verify that you picked the right one. Alternatively, use Find Citation for each new citation.

Working with outside collaborators

Obtain a copy of the collaborator's library for later use with this document or others. Multiple libraries can be used by EndNote for a single document. Simply open it at the same time as the Universal Library.

<p>Note – The newest version of EndNote can output a compressed library file, .1nlx, so that the library can be transferred all in a single file; the folder of separate files need not be transferred.</p>
--

Import the collaborator's library into the Universal Library, if desired.

If the travelling library contained in a collaborator's document is lost due to unformatting, the collaborator can export his or her travelling library and send to you (or vice versa). That way, imported travelling-library references will reappear in your document, even though they are not in any of your libraries.