

PubMed Search & Reference Management

Training
Manual for
Health Care
Providers

2016

The Union

International Union Against
Tuberculosis and Lung Disease
Health solutions for the poor



Literature Search using PubMed and Managing References using Mendeley

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Literature Search using PubMed

Section 1: Introduction

PubMed is a resource that most health science professionals and students search to discover published medical literature. PubMed is a database created and maintained by the National Library of Medicine, located in Bethesda, Maryland, USA. This resource has been free since 1997, thanks to a decision by the United States Government, at that time.

What is PubMed?

PubMed is an index to articles published in around 5000 biomedical journals published across the world. It covers new and old journals, and the coverage of some journals goes back to the 1930s.

An “index” means a resource that tells us what is published about a topic, in one or more resources. A book’s index is usually found at the end of the book. Various topics are listed alphabetically, and aspects of each topic may also be listed. Against each topic or aspects, the indexer indicates in which page/s of the book we will find coverage about them.

PubMed is an index which we can search to know which journal/s carry articles about the term or concept we are searching. When we search a term/s, we get a list of articles published in several journals. The results give us “bibliographic details” about every article. Bibliographic details include the title of the article, the names of the author/s and details about the journal in which the article appears - the name, the volume number, issue number and page numbers. The articles in journals that are not yet published in the print version of journals, may not include complete bibliographic details.

PubMed is actually a combination of “collections of journals”. Each collection was earlier a separate database. The individual collections are – MEDLINE, Old Medline, AIDSLINE, and more. We will refer to each of these in specific contexts.

What do PubMed results look like?

The screenshot shows the PubMed website interface. At the top, the search bar contains the term 'malaria'. Below the search bar, there are options for 'Format: Summary', 'Sort by: First Author', and 'Send to'. The search results are displayed as a list of items, with the first item being 'Blood transfusions for malaria 'could be made safer''. The second item is a retraction of a study on malaria. The third item is 'Seven days in medicine: 2-8 January'. The page shows 1 to 20 of 79685 items. The left sidebar contains various filters such as Article types, Text availability, Publication dates, and Species.

The search results display a list of publications in which we find results for our search term/s. Every result item tells us details about the title, author, name of the journal and more details.

PubMed has more than 26 million records in its database. So naturally, almost any term we search gets us thousands of results. It is important to understand four principles of searching PubMed so that we learn how to:

- Get relevant results
- Narrow down results or broaden results
- Find the “needles in the haystack”
- Not miss out any record, if we are doing a search for writing a systematic review / meta-analysis/ guideline

Knowing the principles of searching PubMed is vital:

- When you try to create your search strategies

2. Wish to understand options available to you
3. Want to use some features in PubMed, which are based on one or more principles

Sometimes it is a combination of two or all three scenarios above

Section 2: The Four Principles of Searching

Principle I: Word Search

A search engine most often retrieves results that contain words / phrases that we search for.

Most of us enter just words, phrases or sentences in PubMed. For example

- Malaria
- Retinopathy of prematurity
- Treatment of Lyme disease

And we expect PubMed to give us results *about* these diseases. But the search engine in PubMed is a computer's search engine, and is programmed to find and get results that *contain* these terms. In other words, every result we get when we do any of the searches above, will *contain* the search term/s but many of our results will not be *about* the terms.

Take a look at the result below. This result shows an article that contains the phrase "Lyme disease" in the title and is obviously about Lyme Disease.

[Diagnosis, treatment, and prevention of Lyme disease.](#)

Anderson RE.

JAMA. 1998 Sep 23-30;280(12):1050-1. No abstract available.

PMID: 9757845

[Similar articles](#)

Now take a look at the following abstract. This result shows an article that contains the phrase "Lyme disease" in the abstract, as a mention, but the article is about Bell palsy.

Am Fam Physician. 2014 Feb 1;89(3):209-12.

Common questions about Bell palsy.

Albers JR¹, Tamang S².

Author information

Abstract

Bell palsy is an acute affliction of the facial nerve, resulting in sudden paralysis or weakness of the muscles on one side of the face. Testing patients with unilateral facial paralysis for diabetes mellitus or Lyme disease is not routinely recommended. Patients with Lyme disease typically present with additional manifestations, such as arthritis, rash, or facial swelling. Diabetes may be a comorbidity of Bell palsy, but testing is not

Principle I : When we search PubMed with a word or phrase or a sentence, the results contain our search terms in the bibliographical details of every result. We do not know how many results are about our search term/s

Principle II: MeSH Search

In several electronic resources, articles are “tagged” with the right descriptors (words that describe the item). If we search using tags, we get relevant results. In PubMed, majority of records are tagged with terms that describe the entire article. These tags are called MeSH terms. MeSH stands for Medical Subject Headings. MeSH Terms are standardized. The terms are all available in the “MeSH database”, which can be reached through the PubMed website.



The screenshot shows a PubMed record for an article. At the top, the PubMed logo and "US National Library of Medicine National Institutes of Health" are visible. A search bar contains "PubMed" and a dropdown menu is set to "Advanced". Below the search bar, the format is set to "Abstract". The article title is "Health security: the defining challenge of 2016." with a subtitle "[No authors listed]". The PMID is 26738700 and the DOI is 10.1016/S0140-6736(15)01285-4. Below the article information, there is a section titled "Publication Types, MeSH Terms" which lists several MeSH terms: Advisory Committees*, Arbovirus Infections, Asthma, Dementia, Global Health*, HIV Infections, Humans, Hypertension, Periodicals as Topic, and Research*.

The record above shows that the title of an article does not tell us what disease/s are covered in the article. The MeSH terms in the lower half, tell us that the article is about Arbovirus infections, Asthma, Dementia and more.

The good news is that we can instruct PubMed to fetch us search results that *contain* our search term/s *IN the list of MeSH Terms*.

How do we do that? If we want articles *about Malaria*, all that we need to do is type the word Malaria followed by [mesh]



Then in the search results, every item will contain the term Malaria IN the list of MeSH terms. This will happen even if the term malaria is not present in the title or abstract.

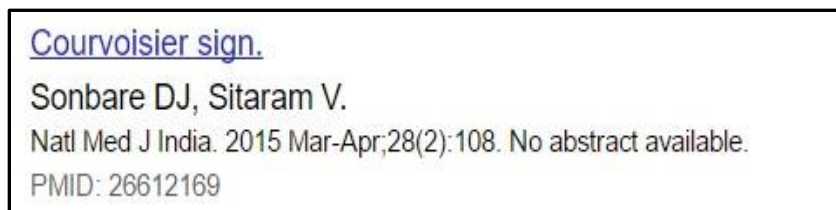
Note: MeSH terms are not the same as key words added in the article by the author or the editor of the journal or the publisher. They are added to most PubMed records, by “indexers” in the National Library of Medicine (NLM), USA, where PubMed is compiled and maintained.

Principle II : Standardized and specific tags that denote medical concepts are added to most PubMed records, to describe the article. These tags are called Mesh terms. If we search using MeSH terms, we get results about our search term. Only articles from the “MEDLINE” journals group, get MeSH terms

Principle III: Field Search

Electronic databases are structured. Every item in a database is similar to another in structure. PubMed’s items are all journal articles. So practically every item has one or more authors, a title, and each is published in a journal which has a volume number, issue number and page numbers. (There are some variations, but majority are as described). Thanks to this similarity every part of an item can be “tagged” with a “Field name”. For every article item in the PubMed database, the tags are – Author, Title and other fields just described. A simpler way of understanding this is to imagine that every record can be displayed in a table.

This is a typical PubMed record. In blue font is the title. Just below are the authors. And then the journal details – the journal name, publication year, month, volume number, issue number and page number



The same record can be displayed as:

Title	Author	Journal name	Year	Volume	Issue	First page
Courvoisier sign	Sonbare Sitaram	Natl Med J India	2015	28	2	108

With such a structure, we can do a search, where we specify that we want our search term to be in a specific field. Take the following examples:

[Imaging in the White Dot Syndromes](#)
 Dunn JP.
 Int Ophthalmol Clin. 2016 Fall;56(4):175-201. d
 PMID: 27575767

[Alexander's disease and the story of Louise.](#)
 Wilson BA, Vargha-Khadem F, Florschütz G.
 Neuropsychol Rehabil. 2016 Aug 31:1-9. [Epub ahead of print]
 PMID: 27580295

In the first, the word 'White' appears in the title. But 'White' could appear as an author too. In the second, 'Wilson' is an author, but 'Wilson' is also the name of a disease. What if we wanted to search for the word "White" as a colour and "Wilson" as an author?

We can do that by specifying that these words must be present in specific fields.

How do we do that? We can add the tags or the field names after the term

Examples:

If we type	Where our search term/s will appear in all results we get
White[Ti]	White appears in the title

Wilson [AU]	Wilson will be an author
-------------	--------------------------

Other fields are

If we type the following after our search term	Fields
[Tiab]	Title or abstract
[JOUR]	Name of the publication
[Pdat] or [DP]	Publication date (year) or Date of publication
[Ad]	Author's address / affiliation
[Vol]	Volume number
[IP]	Issue number or part
[Page] or [PG]	Page number

Please note:

- The brackets must be square [] and not round ().
- What you type inside the square brackets is not case-sensitive.

Principle III : Every item in PubMed is in a structured format, and so can be represented in a structured format like a table. We can search for our search term in specific parts of the record.

Principle IV: Using Boolean Operators

We rarely search for a single term. If we need to search on a topic we usually have several terms. To combine search terms, we should not use prepositions and conjunctions, which we use in sentences. We use standardized terms called Boolean Operators.

The three Boolean Operators in PubMed are

- AND
- OR
- NOT

These must be typed in capital letters while searching.

Understanding Boolean Operators

If we searched:

PubMed	▼	Asthma
--------	---	--------

Let us assume we got 100 results. We now know that the results contain the word Asthma (They may or may not be about Asthma)

If we searched

PubMed	▼	Asthma AND Bronchitis
--------	---	-----------------------

We will get less than 100 results because PubMed will pull out records that contain both terms together.

Our minds are conditioned to think that 'AND' means more. We imagine that we first get 100 articles about asthma, and if we add AND bronchitis, we will get additional articles about bronchitis

We need to remember that the PubMed search engine retrieves records containing both our terms. If we specify where in the record our search term should be, it will retrieve records containing our terms in that area of the record

If we searched:

PubMed	▼	Asthma OR Bronchitis
--------	---	----------------------

We will get more than 100 results because PubMed will pull out records that contain at least one of the terms. In other words, every record will contain either asthma or bronchitis or both.

Our minds are conditioned to think that 'OR' means only one. We imagine that we get articles about ONLY one of our search terms.

In this case, PubMed understands that it has to give us results in which, in every record, a minimum of one of our search terms is present.

If we searched:

PubMed ▼	Asthma NOT Bronchitis
----------	-----------------------

We will get less than 100 results because PubMed will first pull out records that contain asthma. Then, from the resulting set, it will remove records that contain bronchitis.

In this case, our normal thinking, relating to the word NOT – works! NOT means we are eliminating something.

When Boolean operators are applied PubMed reads it from left to right. For example if the search term is **Asthma AND Bronchitis NOT Tuberculosis** the search details will be **(Asthma AND Bronchitis) NOT Tuberculosis**. In other words, both the search terms Asthma AND Bronchitis NOT Tuberculosis and (Asthma AND Bronchitis) NOT Tuberculosis will yield the same results. The results will change when you specify the brackets in such a way as follows: **Asthma AND (Bronchitis NOT Tuberculosis)**

Recap – Four Principles

1. If we search with plain words and phrases, the results contain our search terms. They may or may not be about our terms.
2. Standardized and specific terms called MeSH terms are tagged to most PubMed records to describe the content of the articles. If we search using these terms, and specify that the results must contain our term, in the list of tags, then we get relevant results.
3. PubMed records are structured. So we can ask for results, where our search terms appear in specific fields like – Author, Title, Journal name, etc.
4. When we search for more than one term, we need to use Boolean Operators – AND, OR, NOT

Section 3: The MeSH Database and MeSH Searching

MeSH – a Recap

We learned in Principle II, that MeSH (Medical Subject Headings) terms are tagged to majority of PubMed records, to “describe” the articles they represent. (See figure below)

Format: Abstract ▾

[Ann Allergy Asthma Immunol. 2010 Oct;105\(4\):A4. doi](#)

On the cover - date palm.

[Weber RW.](#)

PMID: [20934623](#) DOI: [10.1016/j.anai.2010.09.001](#)

[PubMed - indexed for MEDLINE]

MeSH Terms, Substances

MeSH Terms

[Allergens/immunology*](#)

[Arecaeae/immunology*](#)

[Asthma](#)

[Commelinaceae/immunology](#)

[Conjunctivitis](#)

[Cross Reactions](#)

[Desensitization, Immunologic*](#)

[Egypt](#)

[Fruit/adverse effects](#)

[Humans](#)

[Incidence](#)

[Mediterranean Region](#)

[Randomized Controlled Trials as Topic](#)

[Rhinitis, Allergic, Seasonal/drug therapy](#)

[Rhinitis, Allergic, Seasonal/epidemiology*](#)

[Rhinitis, Allergic, Seasonal/immunology*](#)

[Rhinitis, Allergic, Seasonal/physiopathology](#)

Just viewing the title does not give us clarity on what the article is about. But if we see the MeSH Terms, we understand what the article is about.

Understanding how MeSH Terms are displayed:

Some terms are marked with a star or asterisk (*). These are concepts which the article covers in great detail.

Some have another term after a forward slash (/). The term after the forward slash is a subheading or an aspect of the MeSH Term

Some have neither. These terms are covered in general or to some extent in this article
In this article, going by the MeSH Terms we can see that:

Immunology of allergens is covered in great detail

The *adverse effects of fruits* are covered in a reasonable detail

Asthma, Conjunctivitis etc. are covered in a reasonable detail

Importance of MeSH Terms

Read these four article titles

1. Increase in the incidence of heart arrests in India
2. Cardiac arrests: on the rise in India?
3. Myocardial infarction in India: the numbers are alarming
4. Heart attacks: why are we hearing so much about them suddenly?

Notice that there are different terms to describe heart attacks, and increase in incidence. Based on the first principle of searching (Word search) if we wanted to find all these articles, we would have to think of all the different terms, and search them.

MeSH terms are standardized terms to describe variations of any concept. So, in PubMed, an indexer would describe each of them with the MeSH terms – myocardial infarction and incidence. So we simply need to search:

Myocardial infarction[mesh] AND incidence[mesh]

Finding the right MeSH Term for any concept

MeSH or Medical Subject Headings are stored in the MeSH Database, and you can reach this from the PubMed home page.

www.ncbi.nlm.nih.gov/pubmed

NCBI Resources How To Sign in to NCBI

PubMed.gov US National Library of Medicine National Institutes of Health PubMed Advanced Help

PubMed
PubMed comprises more than 26 million citations for biomedical literature from MEDLINE, life science journals, and online books. Citations may include links to full-text content from PubMed Central and publisher web sites.

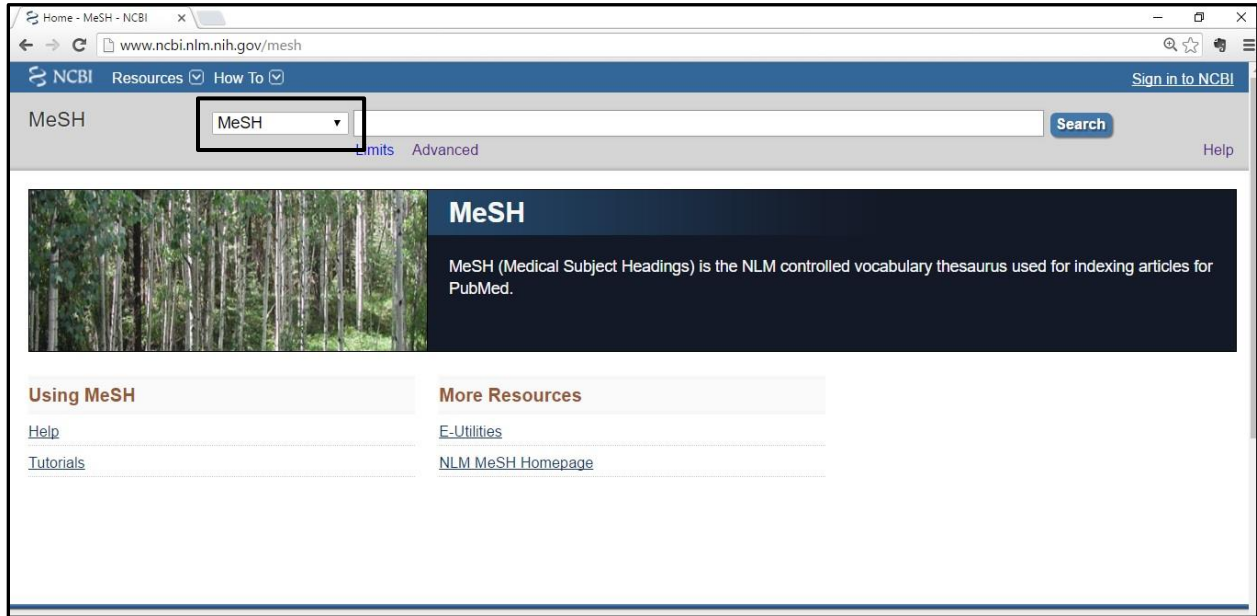
PubMed Commons
Featured comment - Aug 25
As part of @opentrials, Fleminger & @bengoldacre look to connect articles to correct #clinicaltrial IDs, e.g. bit.ly/2beE9z1

Using PubMed
[PubMed Quick Start Guide](#)
[Full Text Articles](#)
[PubMed FAQs](#)
[PubMed Tutorials](#)
[New and Noteworthy](#)

PubMed Tools
[PubMed Mobile](#)
[Single Citation Matcher](#)
[Batch Citation Matcher](#)
[Clinical Queries](#)
[Topic-Specific Queries](#)

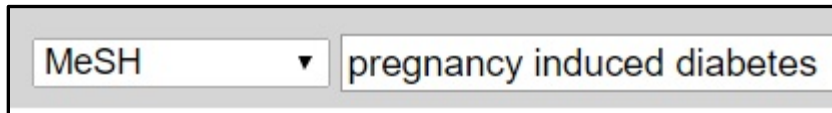
More Resources
[MeSH Database](#)
[Journals in NCBI Databases](#)
[Clinical Trials](#)
[E-Utilities \(API\)](#)
[LinkOut](#)

Click the link – MeSH database and you will be led to the page from which you can search the MeSH Database for the right MeSH Terms

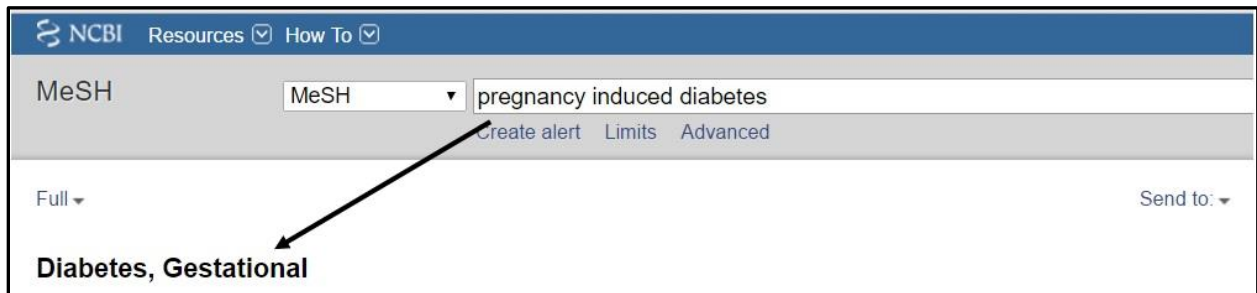


When we search the MeSH Database, we may find just one standard MeSH term for our search, or a set of options.

Example 1: Let us search for Pregnancy induced diabetes in the MeSH database



In the result page, we find the standardized MeSH term for this phrase to be – Diabetes, Gestational

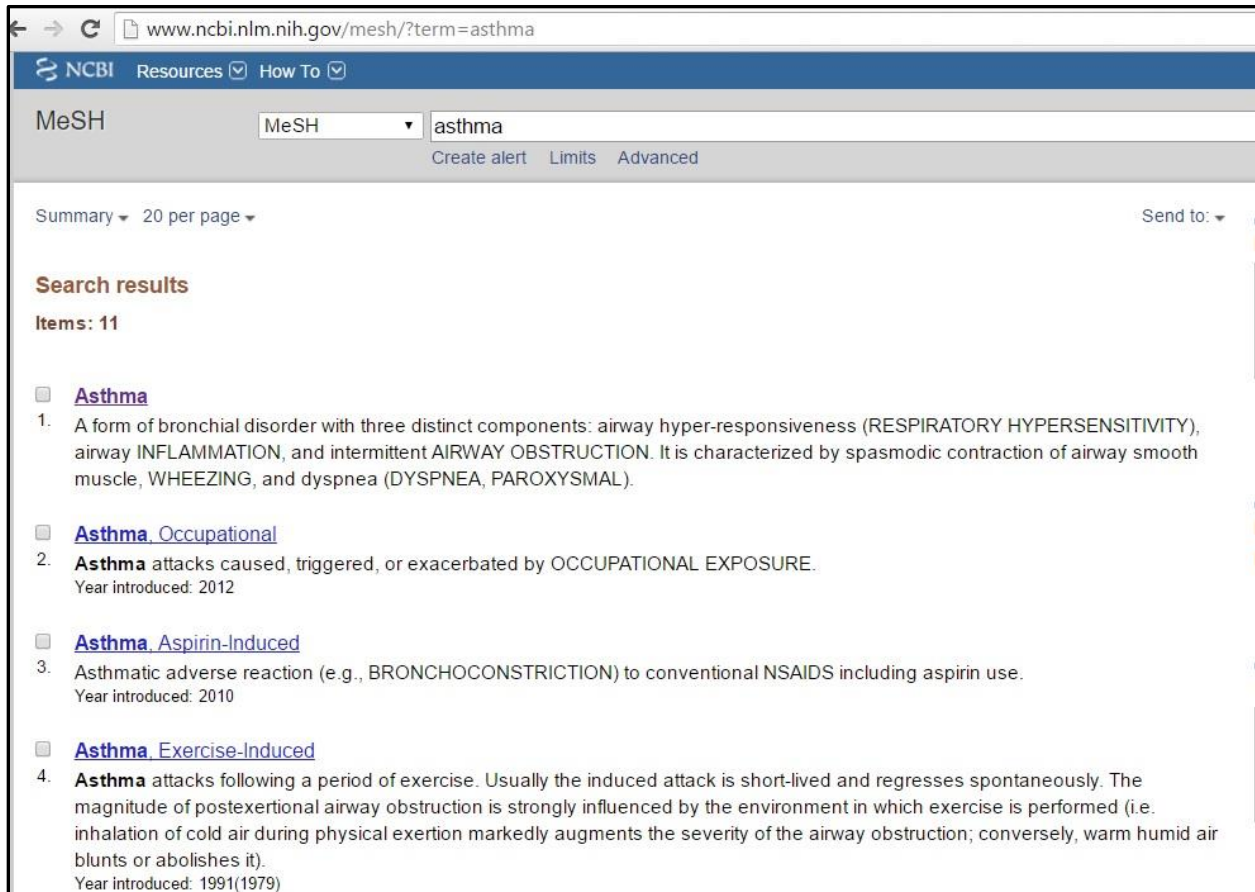


Example 2: If we search for Asthma



A search box with a dropdown menu set to 'MeSH' and the text 'asthma' entered in the input field.

In the results page we get a choice of terms.



The screenshot shows the MeSH search results page for the term 'asthma'. The page includes a navigation bar with 'NCBI Resources' and 'How To' links. The search results are displayed as a list of 11 items, with the first four items visible. Each item is a MeSH term with a brief description and the year it was introduced.

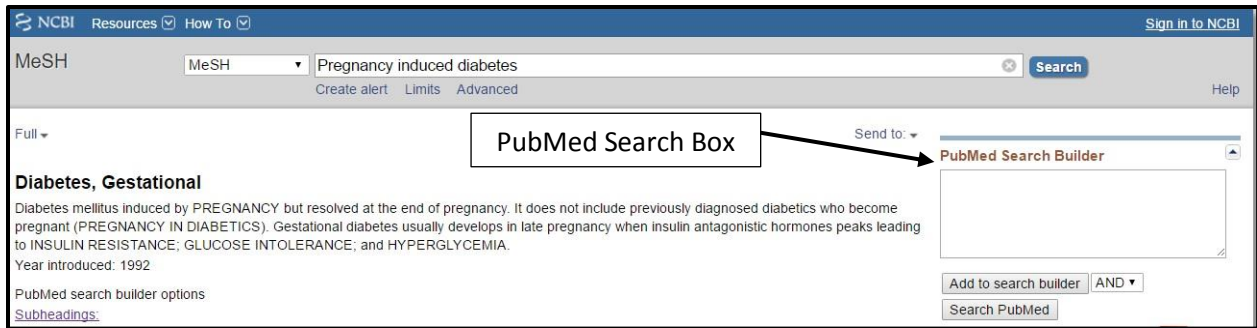
Search results
Items: 11

- [Asthma](#)
1. A form of bronchial disorder with three distinct components: airway hyper-responsiveness (RESPIRATORY HYPERSENSITIVITY), airway INFLAMMATION, and intermittent AIRWAY OBSTRUCTION. It is characterized by spasmodic contraction of airway smooth muscle, WHEEZING, and dyspnea (DYSYPNEA, PAROXYSMAL).
- [Asthma, Occupational](#)
2. **Asthma** attacks caused, triggered, or exacerbated by OCCUPATIONAL EXPOSURE.
Year introduced: 2012
- [Asthma, Aspirin-Induced](#)
3. Asthmatic adverse reaction (e.g., BRONCHOCONSTRICTION) to conventional NSAIDS including aspirin use.
Year introduced: 2010
- [Asthma, Exercise-Induced](#)
4. **Asthma** attacks following a period of exercise. Usually the induced attack is short-lived and regresses spontaneously. The magnitude of postexertional airway obstruction is strongly influenced by the environment in which exercise is performed (i.e. inhalation of cold air during physical exertion markedly augments the severity of the airway obstruction; conversely, warm humid air blunts or abolishes it).
Year introduced: 1991(1979)

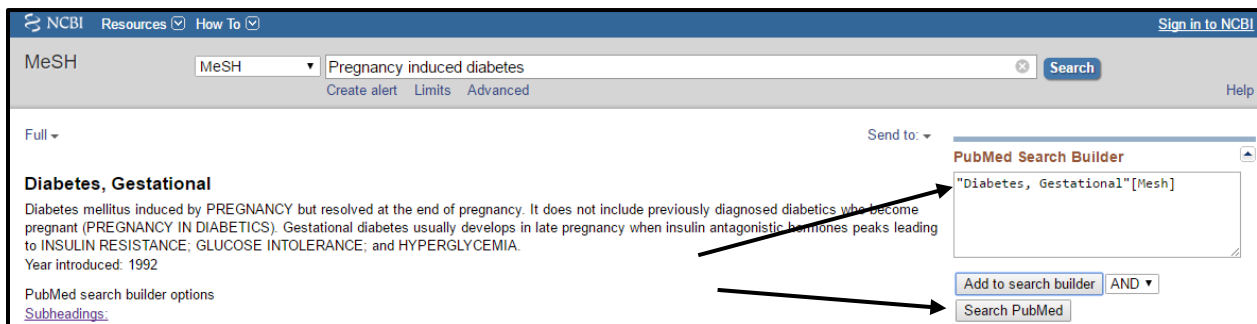
Note that we are actually getting a set of MeSH terms that contain the word Asthma. (This is the application of the word search principle, in the MeSH database). We could choose to search PubMed with the term Asthma or any of the more specific forms of Asthma, if we wish to.

Searching from the MeSH results page

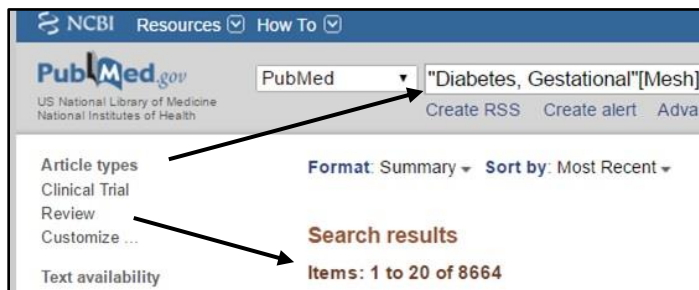
If we go to the first example – Pregnancy induced diabetes, when we search the term, in the MeSH database, we learn that the MeSH term is “Diabetes, Gestational”. Once we find this out, we do not need to go back to PubMed, type the term and add [MeSH] and search. We can do that process right from here, with just two clicks! An important element in the results page is the PubMed Search Builder, which in fact is the PubMed Search Box, placed here for our convenience.



Once we find a term, we can click the button “Add to search builder” just below the PubMed Search Builder box.



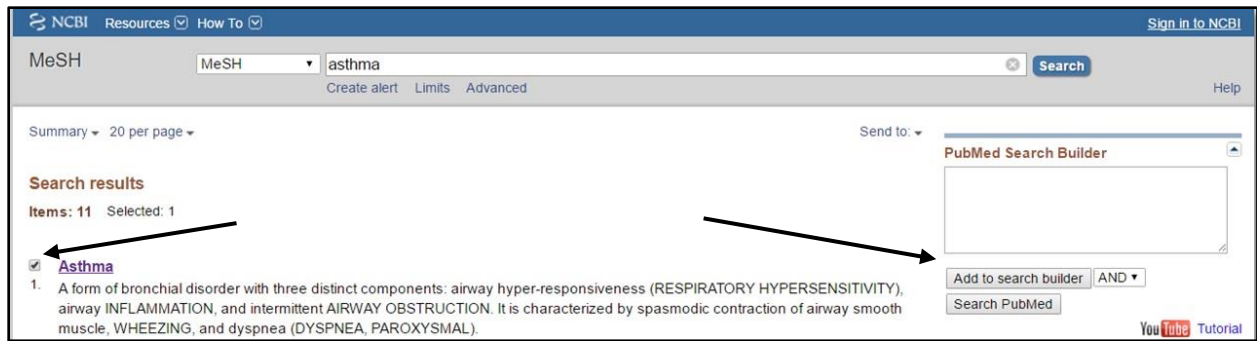
The term gets added and followed with [Mesh], the way we would type it in PubMed. Once the term gets added into the builder, click the Search PubMed button. The page will refresh, take you back to PubMed, with your search done.



That is all it takes to search from the MeSH results page. Once you find your search term,

1. Click the button - Add to Search Builder. The term will be added into the builder with [MeSH]
2. Next click the button – Search PubMed

If you find more than one term – as we did for Asthma, you need to select the term you wish to search, from the options and then do the above two steps



There are lots more options to search from the MeSH results page. For this, we need to understand the elements of the MeSH search results page.

Remember that in PubMed result records, when you clicked “MeSH terms”, to see what terms an indexer has added to a record, we viewed, MeSH terms like Asthma, terms with subheadings – for example, Allergens/Immunology, and some terms having a star () at the end, to signify that they are covered in detail, in the article*

We can actually search the MeSH database using options in the MeSH search results page, to find records in PubMed with subheadings and major coverage of our MeSH terms.

Understanding the MeSH Search Result Page

Let us understand the following elements in the MeSH search results page. You already learned about the “MeSH term” (the standardized term for whatever you searched) and the PubMed Search Builder box. The other elements are:

1. Scope Note
2. Subheadings
3. Entry terms
4. MeSH tree
5. Option to restrict to major focus
6. Options for MeSH tree restriction

Scope Note

The scope note that comes just below the MeSH term in the result page, tells us the meaning of the term, and also tells us what kind of article records we will retrieve, if we search the term. The indexers would have used the term to index specific kinds of articles.

Asthma

A form of bronchial disorder with three distinct components: airway hyper-responsiveness (RESPIRATORY HYPERSENSITIVITY), airway INFLAMMATION, and intermittent AIRWAY OBSTRUCTION. It is characterized by spasmodic contraction of airway smooth muscle, WHEEZING, and dyspnea (DYSPNEA, PAROXYSMAL).

In the above, we find the meaning of Asthma, and the meaning describes the kind of article records to which the MeSH term Asthma will be indexed. In addition, other components are mentioned and for each, the correct MeSH term is indicated in capital letters.

Sometimes MeSH Terms are so specific that the Scope Note will also indicate what type of articles they will not cover. See the example below:

Diabetes, Gestational

Diabetes mellitus induced by PREGNANCY but resolved at the end of pregnancy. It does not include previously diagnosed diabetics who become pregnant (PREGNANCY IN DIABETICS). Gestational diabetes usually develops in late pregnancy when insulin antagonistic hormones peaks leading to INSULIN RESISTANCE, GLUCOSE INTOLERANCE, and HYPERGLYCEMIA.

Here the first sentence gives us the meaning of Gestational Diabetes (the standardized term for Pregnancy Induced Diabetes). The second sentence in the scope note tells us that this term does not include articles about patients who are already diabetic, and then become pregnant. For such a population, the MeSH Term assigned will be 'Pregnancy In Diabetics'.

Another example:

MeSH	MeSH	spectacles
		Create alert Limits Advanced
Full		Send to:
Eyeglasses		
A pair of ophthalmic lenses in a frame or mounting which is supported by the nose and ears. The purpose is to aid or improve vision. It does not include goggles or nonprescription sun glasses for which EYE PROTECTIVE DEVICES is available.		

Read the scope note above, and you find that the 'Eyeglasses' is the MeSH term used for prescriptive lenses, but for nonprescription lenses, we need to use the MeSH Term 'Eye Protective Devices'.

Once we find one or more MeSH Terms for our search, we need to read the scope note carefully to determine which one would be the best for our topic.

Subheadings

Every MeSH term has aspects – also called subheadings. Just like the MeSH terms, there is a database of subheadings. When you view a MeSH term, you can only see the subheadings applicable to that MeSH term. For instance if the MeSH term you searched for was a disease – they you will subheadings like drug therapy, etiology, prevention & control etc. But if it were a drug or class of drugs then you will see subheadings like adverse effects, pharmacokinetics, therapeutic use etc. You can select the subheadings you like and then add to the search builder.

NCBI Resources How To

MeSH MeSH Limits Advanced

Full Send to:

Rifampin

A semisynthetic antibiotic produced from *Streptomyces mediterranei*. It has a broad antibacterial spectrum, including activity against several forms of *Mycobacterium*. In susceptible organisms it inhibits DNA-dependent RNA polymerase activity by forming a stable complex with the enzyme. It thus suppresses the initiation of RNA synthesis. Rifampin is bactericidal, and acts on both intracellular and extracellular organisms. (From Gilman et al., Goodman and Gilman's The Pharmacological Basis of Therapeutics, 9th ed, p1160)
Year introduced: 1973

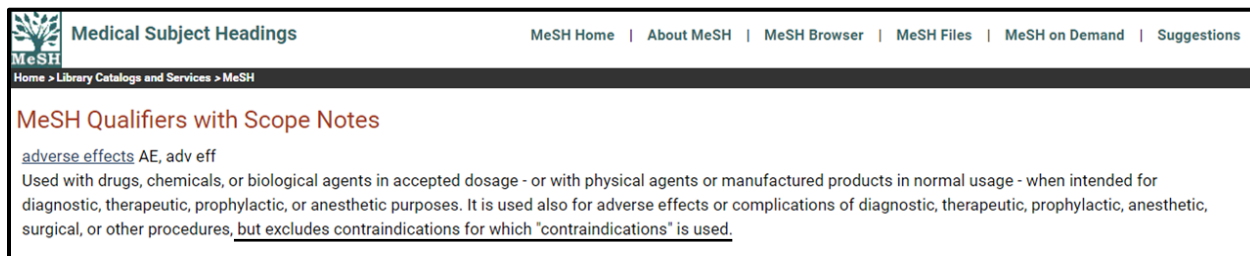
PubMed search builder options

[Subheadings:](#)

<input type="checkbox"/> administration and dosage	<input type="checkbox"/> contraindications	<input type="checkbox"/> physiology
<input type="checkbox"/> adverse effects	<input type="checkbox"/> economics	<input type="checkbox"/> poisoning
<input type="checkbox"/> analogs and derivatives	<input type="checkbox"/> etiology	<input type="checkbox"/> radiation effects
<input type="checkbox"/> analysis	<input type="checkbox"/> history	<input type="checkbox"/> standards
<input type="checkbox"/> antagonists and inhibitors	<input type="checkbox"/> immunology	<input type="checkbox"/> statistics and numerical data
<input type="checkbox"/> biosynthesis	<input type="checkbox"/> isolation and purification	<input type="checkbox"/> supply and distribution
<input type="checkbox"/> blood	<input type="checkbox"/> metabolism	<input type="checkbox"/> therapeutic use
<input type="checkbox"/> cerebrospinal fluid	<input type="checkbox"/> organization and administration	<input type="checkbox"/> therapy
<input type="checkbox"/> chemical synthesis	<input type="checkbox"/> pharmacokinetics	<input type="checkbox"/> toxicity
<input type="checkbox"/> chemistry	<input type="checkbox"/> pharmacology	<input type="checkbox"/> urine
<input type="checkbox"/> classification		

To know the scope of each subheading, click the Hyperlink – “Subheadings” just above the list of subheadings. It is important to know these too, in order to choose the right subheadings. We recommend that you bookmark the page, or save it or print it, till you are familiar with the scope of common ones. Many scope notes of subheadings indicate what they do not cover too.

To illustrate



The screenshot shows the MeSH website interface. At the top, there is a navigation bar with links: MeSH Home, About MeSH, MeSH Browser, MeSH Files, MeSH on Demand, and Suggestions. Below the navigation bar, the page title is 'MeSH Qualifiers with Scope Notes'. The main content area displays the scope note for 'adverse effects' (AE, adv eff). The note states: 'Used with drugs, chemicals, or biological agents in accepted dosage - or with physical agents or manufactured products in normal usage - when intended for diagnostic, therapeutic, prophylactic, or anesthetic purposes. It is used also for adverse effects or complications of diagnostic, therapeutic, prophylactic, anesthetic, surgical, or other procedures, but excludes contraindications for which "contraindications" is used.'

In the figure above, you see the Scope note for the subheading Adverse Effects. At the end of the note, do observe that this subheading does not include articles about contraindications of a drug, because there is a separate subheading – contraindications – that an indexer would use to index or tag such article records.

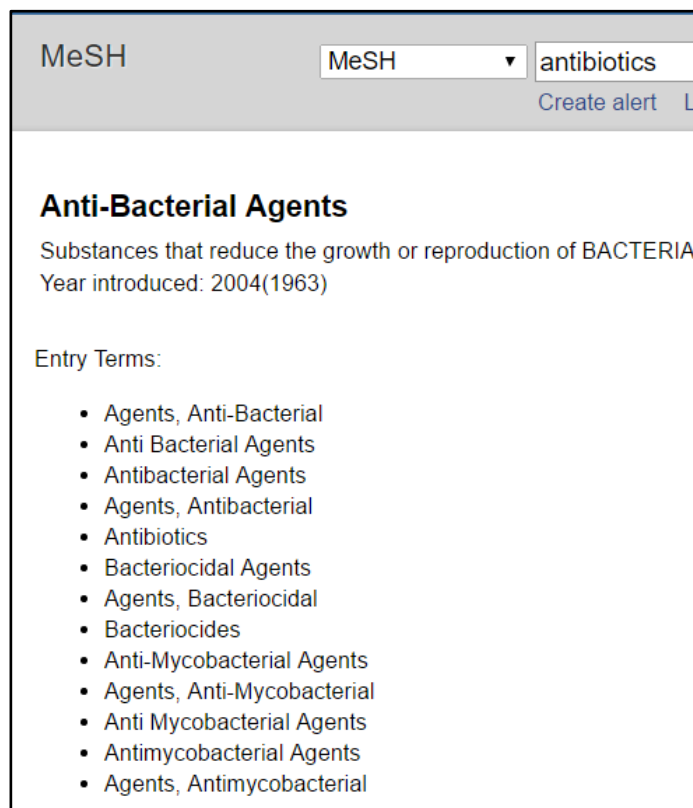
Entry Terms

For every MeSH term that you search and locate in the MeSH database, there will be number of entry terms. You will find these a little below the subheadings. Entry terms are synonyms or terms that users search to locate a search term.

Example:

Here, note that we searched for the term 'antibiotics'. The standard MeSH term is Anti-bacterial Agents.

The list of entry terms (it comes below the subheadings, but we have illustrated it above here), includes Antibiotics.



The screenshot shows the MeSH search results for the term 'antibiotics'. The search bar at the top shows 'MeSH' in a dropdown menu and 'antibiotics' in the search input field. Below the search bar, the results for 'Anti-Bacterial Agents' are displayed. The description reads: 'Substances that reduce the growth or reproduction of BACTERIA. Year introduced: 2004(1963)'. Below the description, the 'Entry Terms' section lists the following synonyms:

- Agents, Anti-Bacterial
- Anti Bacterial Agents
- Antibacterial Agents
- Agents, Antibacterial
- Antibiotics
- Bacteriocidal Agents
- Agents, Bacteriocidal
- Bacteriocides
- Anti-Mycobacterial Agents
- Agents, Anti-Mycobacterial
- Anti Mycobacterial Agents
- Antimycobacterial Agents
- Agents, Antimycobacterial

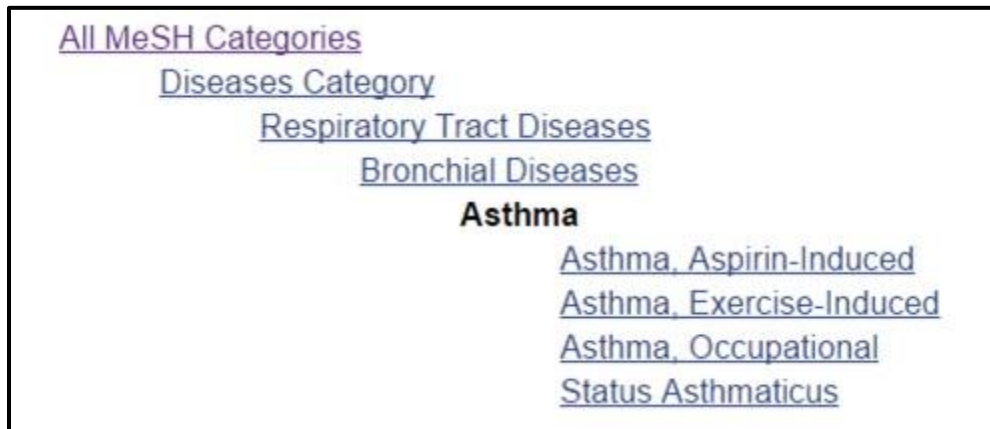
Note: Entry terms can be searched in the PubMed database with [MeSH]. If we search any of these entry terms with [MeSH], PubMed will map the term with “Anti-Bacterial Agents” and get us records where indexers have tagged them with this MeSH term.

The MeSH Tree

As we mentioned MeSH terms are all available in the MeSH database. They are stored in a Tree structure – broad to narrow terms.

It helps if you remember the Plant and Animal Kingdoms that you learnt about in High School Biology – and can relate to – Animal Kingdom → Vertebrates → Mammals → Primates → Human

Let us check out the MeSH Tree for Asthma. The Tree will appear below the entry terms.



Asthma you can see – appears under Bronchial diseases, which comes below Respiratory Tract Disease, which is below the Diseases Category. Each higher term is a Broad Term.

Below Asthma – you can see four MeSH headings, each one being a specific type of Asthma, and each is an independent term. So, the four of them appear without any indentation, like the higher terms do.

MeSH Tree and MeSH subheading concepts that you need to understand to apply to searches

Lower terms of any MeSH term, are more specific. For asthma – we saw that the lower terms are more specific asthmas. For Tuberculosis, it is the different types of TB (Latent TB, Ocular TB, MDR TB etc.)

Subheadings are aspects of the MeSH term. Any disease, will have subheadings like etiology, diagnosis, drug therapy etc. A drug or a drug class will have subheadings like adverse effects, pharmacology,

pharmacokinetics etc. These are *aspects* of a MeSH term, and not more specific forms of the MeSH term.

An important point - When you choose a MeSH Term and add it to the Search Builder, it automatically includes a search of all lower terms. So, if you add the MeSH term Tuberculosis to the Search Builder and then Search PubMed, your results will include:

- All records about Tuberculosis in general
- Records about every type of tuberculosis - latent, ocular, MDR etc.

If you wish to retrieve ONLY records of articles about TB in general, you need to click the option – “Do not include MeSH terms found below this term in the MeSH hierarchy.”

- Restrict to MeSH Major Topic.
- Do not include MeSH terms found below this term in the MeSH hierarchy.

Just above this option, you will find the option – Restrict to MeSH Major Topic. If you select this option, your search results will retrieve records, only where in the list of MeSH Terms, you will find Tuberculosis with an asterisk (star - *)

MeSH Terms

[Disease Management](#)

[Drug Monitoring*](#)

[Drug-Related Side Effects and Adverse Reactions*](#)

[Humans](#)

[Tuberculosis/drug therapy*](#)

[World Health Organization](#)

Recap

We just learned about:

- The MeSH Term
- Its subheadings (or aspects)
- Entry terms – these are synonyms of the MeSH Term, which people would search for in the MeSH database
- An option to Restrict to Major

- An option - Do not include terms below this MeSH term.

Note:

The options of Subheadings, Restrict to Major, and Do not include lower terms – are all just that – options. You apply these options, depending on your purpose of the search, and how much literature you would like to review.

Practice – Steps to do a Search starting from the MeSH Database

Search for articles on:

- a) Causes of cirrhosis
- b) Focused articles on causes of cirrhosis
- c) Asthma - general articles, not the more specific types of asthma

Here is a list of steps that we would perform, to carry out searches on the topics above.

Causes of Cirrhosis

1. In the MeSH database, search for Cirrhosis.
2. In the result page, choose the most appropriate term – in this case it would be Liver Cirrhosis
3. Click the term – Liver Cirrhosis (since you need to find the subheading – etiology)
4. Choose the subheading etiology
5. Click Add to Search Builder
6. Click Search PubMed

Focused articles on causes of Cirrhosis

1. Repeat steps 1-4 above
2. Then choose Restrict to Major
3. Then click Add to Search Builder
4. Click Search PubMed

Asthma - general articles, not the more specific types of asthma

1. In the MeSH database, search for Asthma
2. In the result page, click the MeSH term Asthma
3. In the next page, choose – Do not include MeSH Terms found below this term (by choosing this, you are ensuring not to search articles that are on the specific types of Asthma)

Searching with two or more terms

Let us learn how to search for topics that involve two or more MeSH terms

Topic 1 – We want articles that cover Pneumonia and Pulmonary tuberculosis together.

(We may want to find articles that discuss treatment options in both, or we may want to find articles about pneumonia in a patient with a history of tuberculosis)

Let us take a scenario where we have checked both MeSH terms and found that both have more specific terms in their MeSH Trees, and we have decided not to include them. We can also decide that to start with, we want only focused articles, and not articles covering these diseases along with other respiratory illnesses.

How will we do this search?

1. Open the MeSH database
2. Search for Pneumonia
3. Click the term
4. Select – Restrict to Major, and also Do not include terms below
5. Add it to the search builder
6. You will find the term – Pneumonia[majr:noexp] in the Search builder
7. Do NOT click Search PubMed at this point, as you have not finished “building your search”
8. Next, in the “MeSH search box”, erase Pneumonia, and type Pulmonary tuberculosis and search
9. In the next page, again Select Restrict to Major, and also Do not include terms below
10. Click Add to Search Builder
11. You will now see
"Pneumonia"[Majr:noexp] AND "Tuberculosis, Pulmonary"[Majr:noexp]
in the Search Builder
12. Click Search PubMed

Topic 2 – My boss want articles about Pneumonia as well as Pulmonary tuberculosis in children of the 6-12 age group.

There are three concepts in this search. Two are disease concepts and the third is a population concept. Note that we want articles about both diseases in children. Since the boss wants Pneumonia as well as Pulmonary TB in children, it means, that if he needs articles covering

- Pneumonia in children

- Pulmonary TB in children
- Both diseases in children

So we plan the Boolean operators first and then search MeSH

The order of search terms is important here, since we will be searching the MeSH database for terms, one by one and adding them to the builder

The order will be

Pneumonia OR Pulmonary tuberculosis AND children

Steps to search

1. Open the MeSH database
2. First search for Pneumonia. Click the term, and choose Restrict to Major, and Do not include lower terms.
3. Click Add to Search builder
4. Next, search for Pulmonary TB. Make the same choices as for Pneumonia
5. **Select the Boolean Operator – OR** – this is next to the Add to Search Builder button
6. Now click Add to search builder
7. Next – search the MeSH database for the term – children
8. You will find that the term Child covers the ages 6-12. That is perfect for us
9. Click the heading – Child
10. Notice that there is a lower term – Child, preschool and we do not want that
11. Select the Do not include MeSH terms below – option
12. For age groups, Restrict to Major is not recommended.
13. Add the term Child to the Search builder with AND
14. Your final strategy in the Search Builder will be
Pneumonia[Majr:NoExp] OR Tuberculosis, Pulmonary[Majr:Noext] AND Child[Mesh:NoExp]

Reminder:

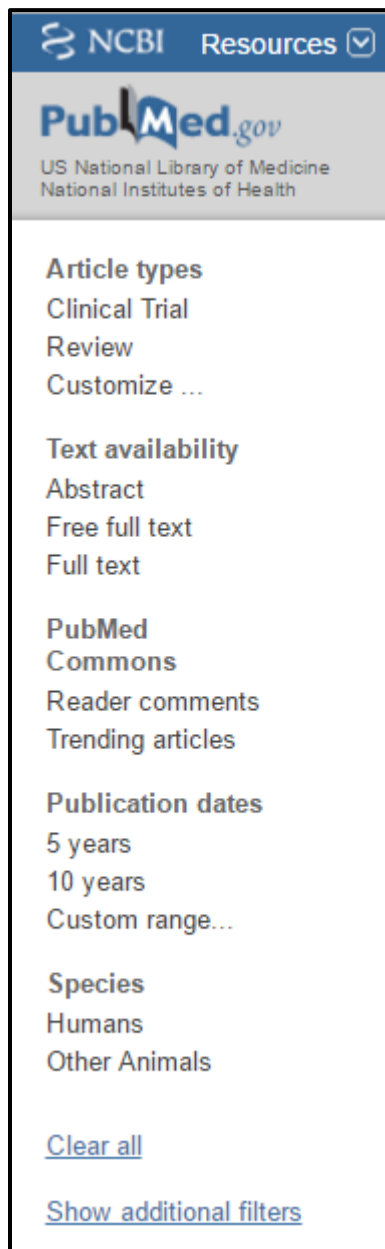
The options of Subheadings, Restrict to Major, and Do not include lower terms – are all just that – options. You apply these options, depending on your purpose of the search, and how much literature you would like to review

We have learned how to find the most relevant literature, using MeSH Terms. Always remember to plan your search strategy with the correct Boolean operators first. Then look for the right MeSH Terms and subheadings for each, and run your search from the MeSH Database. Once you know MeSH terms for your regular topics, you can do searches in the PubMed database directly too.

Section 4: Narrowing or Focusing Searches, Using Filters

Sometimes with whatever features we apply from the MeSH results page, we still get too many search results. There are Filters that we can use, to narrow down our search results. The Filter options are available on the left side of the PubMed search results page. Using Filters is very much like the options that you have when you do online shopping, and can narrow down options by brand, price, etc.

The Default Filters that we can see are in the figure below:



The first set of filters is the “Types of Articles”. Below that comes the “Availability of Texts”. After that come options of PubMed Commons, Publication Dates and Species

Right at the end, there is option to Show Additional Filters. We will explore all these options

How Do Filters Work

1. Filters are links you click, to make your search results more focused. Filters add Boolean Operators to your search, and also use the Field Search Principle in most cases. In most cases, Boolean ‘AND’ gets used, in some, it is Boolean ‘OR’.
2. Every Filter has a scope of coverage.

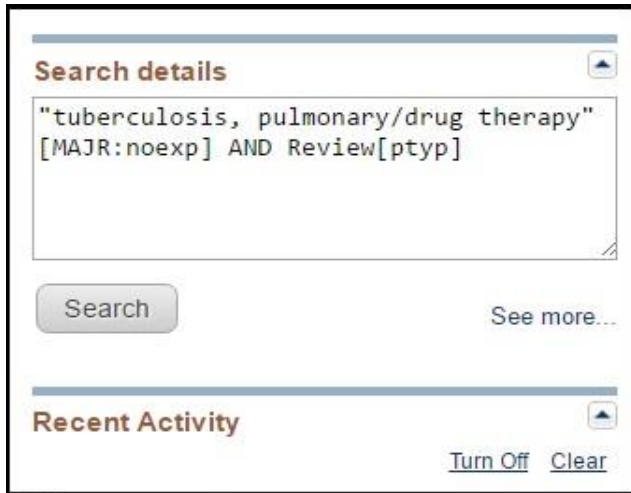
Let us learn about the Boolean Operators used, and the scope of coverage of several filters.

Filters and Boolean Operators

If we wish to filter our search to find only Review Articles on our topic, we need to click the filter “Review” – under Article Types. What happens in this case? PubMed combines your search term/s (whatever you typed in the search box) with – AND Review[ptyp].

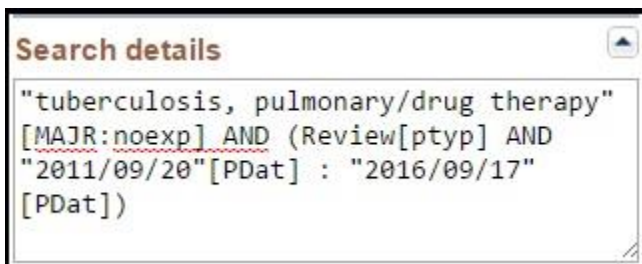
How do we know this?

If we run a search and clicked the Filter – Review, in the search results page, we need to scroll down about half way. Then, on the right side, we can see a box – called “Search details”. This box tells us how PubMed worked on our search filter. See the example below:

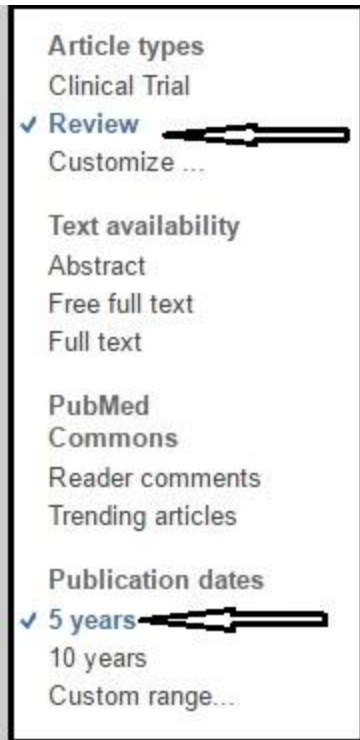


Let us understand this in more detail.

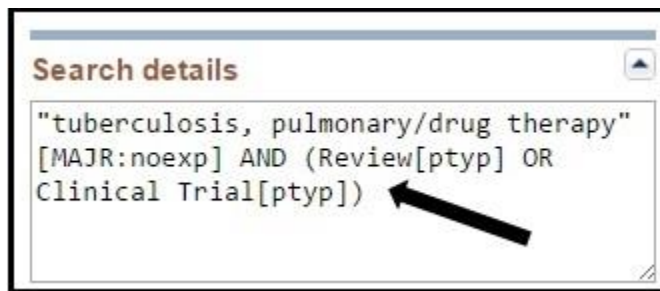
1. If we knew that pulmonary tuberculosis is a MeSH Term, and that drug therapy is a subheading for all diseases, and we wished to restrict to major and not include lower terms, we typed:
pulmonary tuberculosis/drug therapy[major:noexp]
in the PubMed Search box, and searched.
2. We got around 7400 results
3. When we click the filter Review, the results come down to about 450, because PubMed added **AND review[ptyp]** to our search.
4. We can see this step in the Search Details box, as shown in the Picture above.
5. To the search above, if we add a second filter – “5 years” (under publication dates), the results become still less – Only 79 results. And PubMed adds - **AND "2011/09/20"[PDat] :**
"2016/09/17"[PDat] to our search. Note how it has translated the “5 years filter, saving us all that typing!



6. Let us modify the search above. Our filters area will currently look like this:



If we click the “5 years filter” once again, it gets deselected. Our search results will once again be around 450. This time, if we click Clinical Trial, the 450 results increase to about 1250. What PubMed did, was to translate our query as below



This time it applied the Boolean operator ‘OR’, because an article cannot be a Review as well as a Clinical Trial. Note that it has also grouped the two “article types” with round brackets.

Summary: Boolean Operators in Filters:

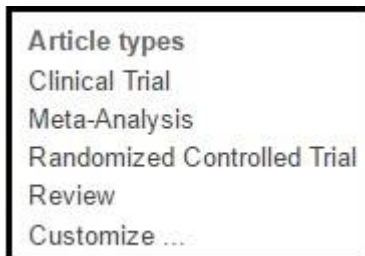
1. By default the first Filter you apply is added to your search strategy with Boolean 'AND'
2. PubMed will apply Boolean 'AND' to most combinations, especially if you apply filters from different categories
3. In Article types, if you choose more than one filter (article type), it applies Boolean 'OR' for reasons explained above
4. It is easy to figure out what Boolean Operator PubMed has applied. Less result numbers, means Boolean 'AND'; and more result numbers means Boolean 'OR'
5. You can check the strategy that PubMed adds – in the Search Details box on the right side of the Search results page.

Explanation about each Category of Filters

1. Article Types: The default two article types are Clinical Trial and Review. If you wish to filter your search to other article types, click "Customize". You will see a pop-up, with several more



You can select as many article types as you wish (you will need to scroll down as you choose), and then click "Show". You will then see those listed under Article Types. Click whichever type you want, to filter your search.



2. Text Availability

This filter group has three filters that limit your search results to different kinds of texts available.

- a. Abstract – When you apply this filter, your results will contain only those that have abstracts
- b. Free full text – Your results will contain only those items, where the full articles are available free online.
- c. Full text – Results contain items where both free and non-free items are available

Note: The Free full text filter gets you items for which articles are available free to the whole world. There are still more free articles in PubMed. To learn about how to trace these, and to get free articles by other methods, [check out this link in QMed's website](http://www.qmed.ngo/full-text-articles/) (<http://www.qmed.ngo/full-text-articles/>)

3. PubMed Commons

PubMed Commons enables authors to share opinions and information about scientific publications in PubMed.

This category has two filters

- a. Readers' Comments – Limits your search to articles where readers have added comments to the record. There is a link to the comment for every result item.
- b. Trending articles are PubMed records with a recent significant increase in views. Your search may not fetch results if you apply this filter.

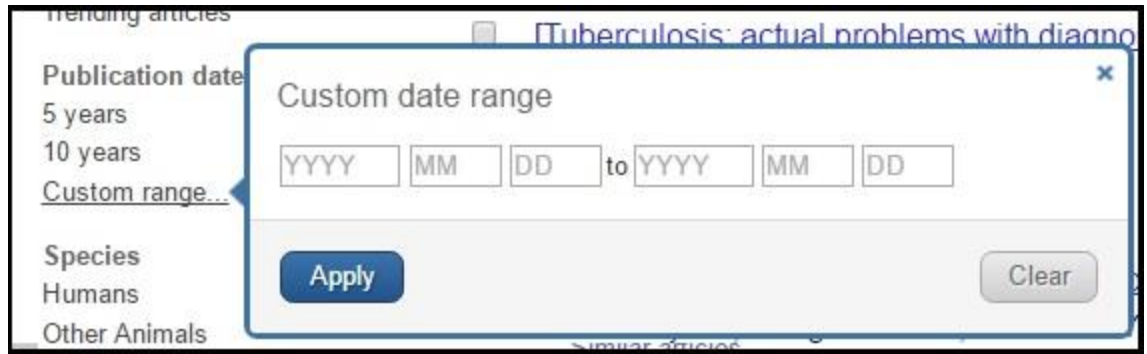
You can learn more about PubMed Commons – at

<http://www.ncbi.nlm.nih.gov/pubmedcommons/faq/>

4. Publication Dates

There are three options here

- a. "5 years" – limits your search results to those published in the last five years
- b. "10 years" - limits your search results to those published in the last ten years
- c. Custom range – Click this and you can see an option, where you can choose a date range (including month and date if you wish to)



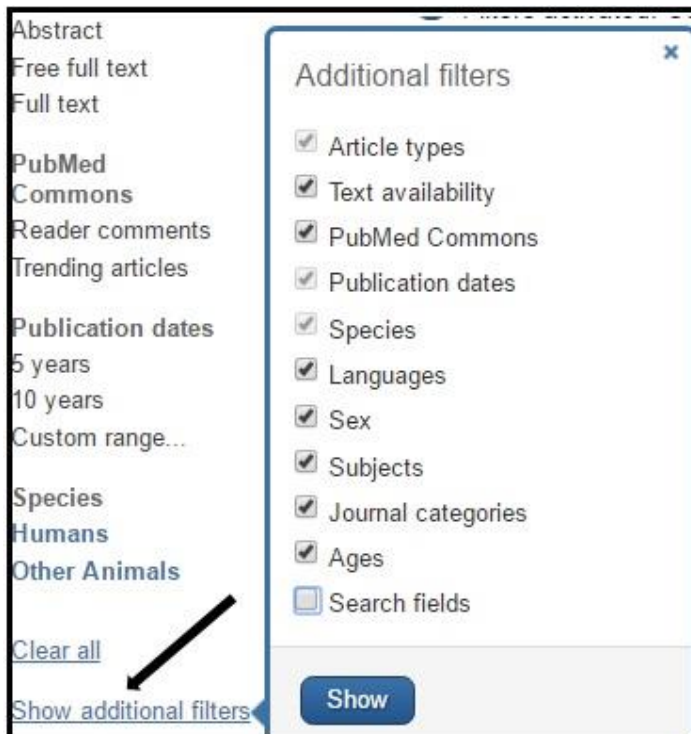
5. Species

Two options here

- a. Humans – combines your search with - AND humans[mesh]
- b. Other animals – combines your search with – AND animals[mesh:noexp] (This is because humans comes under the animals tree, as humans are part of the animal kingdom)

Note that when you apply either filter, you are not eliminating the other. There can be studies that are tagged with both. You are only including the filter that you applied.

6. There are more filters available. You can display them by clicking “Show additional filters”, choosing the ones you wish to view and then clicking the Show button



Languages

PubMed includes journals in several languages. You can restrict to English language journals only. If you click “Customize” you can see more language options, which you can choose, click Show (to display) and then click one or more of them to apply a filter.

7. Sex

Two options – Male and Female. Again – PubMed adds to your search – **AND Male[mesh]**, or **AND Female[mesh]**, respectively. It includes what you added, but does not eliminate the other.

8. Subjects

This category has nine different subjects, out of which you can view three. Click Customize to view, select and display more subject options. Each of the subject filters is a “collection” of PubMed items.

- a. AIDS – This filter restricts your search to articles
 - i. In a set of chosen AIDS journals
 - ii. A set of journals from an old database – AIDSLINE, which included may newsletters.
 - iii. Retrieved from a detailed combination of AIDS related keywords as well as MeSH Terms

(You can click this link - https://www.nlm.nih.gov/bsd/pubmed_subsets/aids_strategy.html - to see the complex strategy built into this filter. Don't worry if you don't understand everything. Just observe that a complex filter is built in for your ease of searching!)

- b. Cancer, Bioethics - Most other subject filters are similar to the AIDS filter – a combination of journals or keywords or mesh terms or more.
- c. Systematic Reviews – This filter has a combination of keywords, MeSH terms, and publication types. It does not retrieve ONLY systematic reviews, but retrieves all records that you may need to write a systematic review.

9. Journal categories

This is a category of groups of journals.

- a. Core clinical journals: This is a group of 119 journals of all specialties, which were once a recommendation for individual practitioners and libraries of small hospitals and clinics.
- b. Dental journals: Is a collection of dental journals
- c. MEDLINE: This is a set of articles from Medline journals that have been tagged with MeSH terms.
- d. Nursing journals: Is a collection of nursing journals

10. Ages

This is a category of Age groups – broad to focused - each filter clearly explains the age group. Click “Customize” to see still more focused options. Remember – like the Species and Sex Filters, when you apply one filter, you are only including that age group, you are not excluding the others.

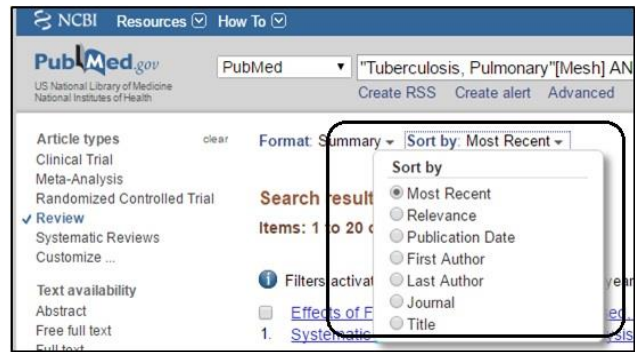
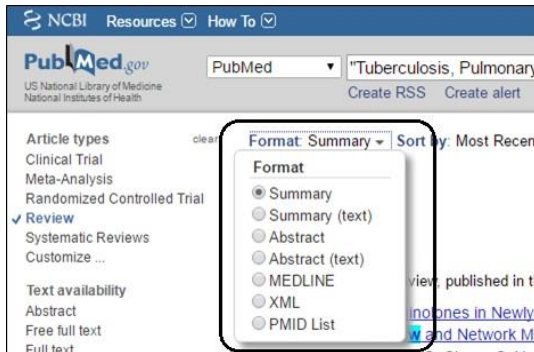
Summary: Scope of Filters

1. Article types – Different types of research and non-research items in journals
2. Text availability – To what extent can you know about the article – abstract only, free article, full article availability (free or otherwise)
3. PubMed Commons: Feedback on articles – either through comments or by how they trend
4. Publication Dates, Species, Languages and Sex: Self explanatory
5. Subjects: Filters created by a combination of one or more of the following: Collection of journals, MeSH terms, publication types, keywords
6. Journal categories: Groups of journals
7. Ages: Broad to narrow age groups

Remember: When you apply a filter, you are including that criterion; you are not excluding other criteria (example – when you apply the Male filter, you can get studies indexed with Male alone, or also Male as well as Female)

Section 5: PubMed Results - Display Formats, Order and Number of Items

When we run searches, results are displayed by default in what is known as the Summary format. The results are shown in the order of “Most Recent” at the top, to “least recent” at the end. ‘Most recent’ means the order in which it has been entered into the PubMed database. (Sometimes article records from old issues of journals may appear at the top, because they got into PubMed well after their publication date). We see 20 results in one page. These options can be changed as follows



At the lower end of the search results page is the option to change the number of results displayed.

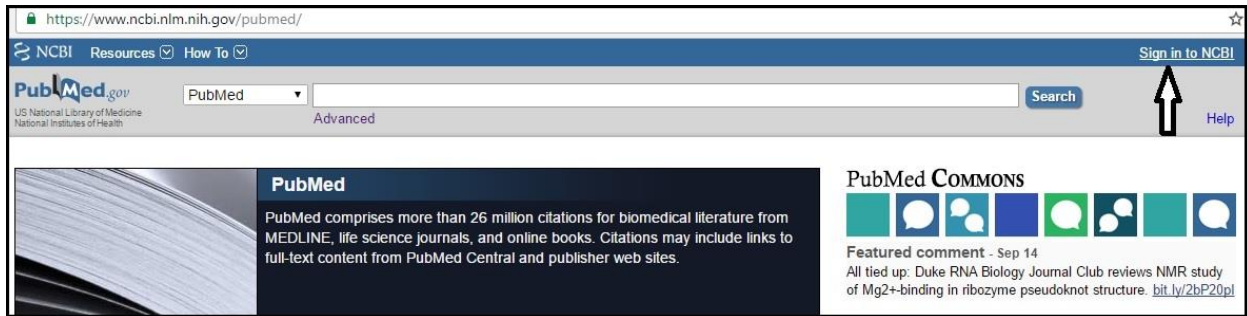


We can change the number of results displayed to as low as 5 or as many as 200 results per page.

Section 6: Creating a MY NCBI Account

We can customize PubMed for our use in different ways. We can get our search terms highlighted with a colour in the results page/s. We can change the way in which results can be displayed. We can save our search strategies and our search results.

To create a My NCBI Account, click Sign in to NCBI at the top right hand corner

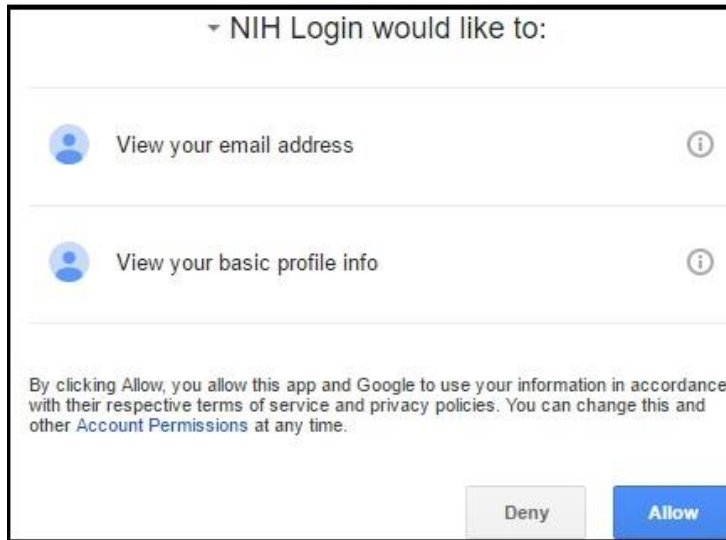


Once we click, we reach a page with two options: 1) Sign in with Google 2) Register for an NCBI Account



Signing in with Google

- Choose “Sign in with google”
- Enter your gmail / google login and password
- In the next screen you will get a question – NIH Login would like to view your email address, and your basic profile info. Click ‘Allow



- In the next screen click ‘Create a new NCBI account’ and click ‘continue’.
- In 5 seconds, the page will automatically redirect to the PubMed Home page
- (The steps may have small variations, as there may be small changes in the process from time to time. But you will be able to do this easily)

Registering an NCBI Account

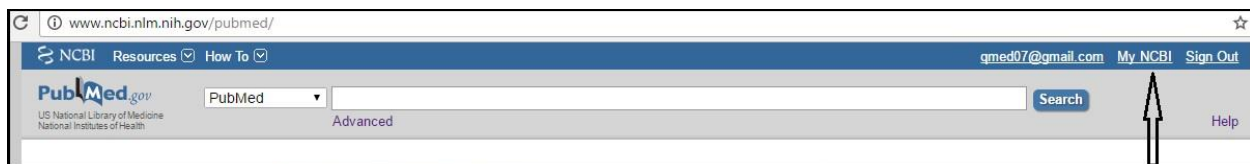
Click “Register for an NCBI Account”.

Fill in all details – A user name, password, email and other essentials, and create your account

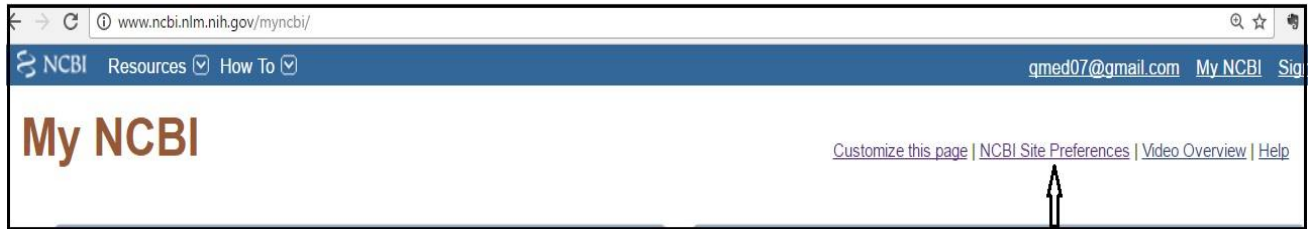
Note: If the username is already taken, it will warn you. Choose another one.

Customizing Your Account

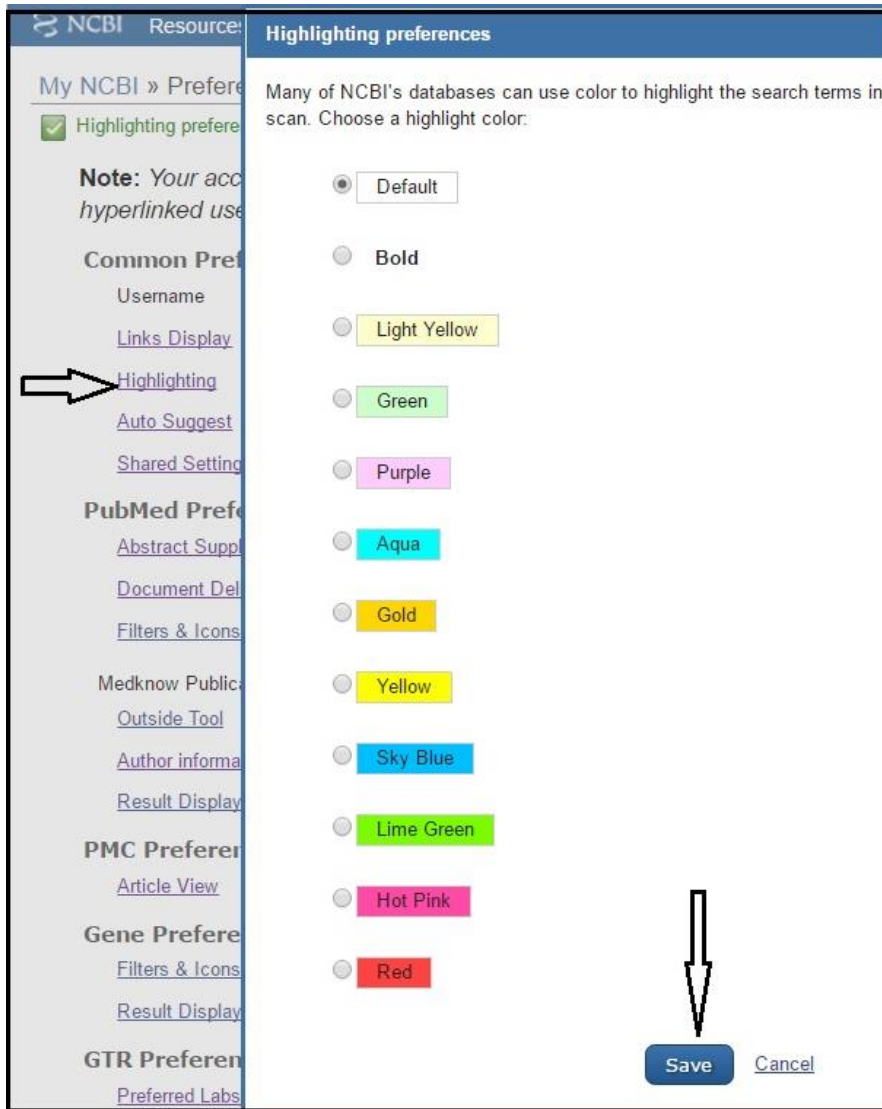
Let us see how our search terms can be highlighted. Click My NCBI



In the next page, click NCBI Site Preferences

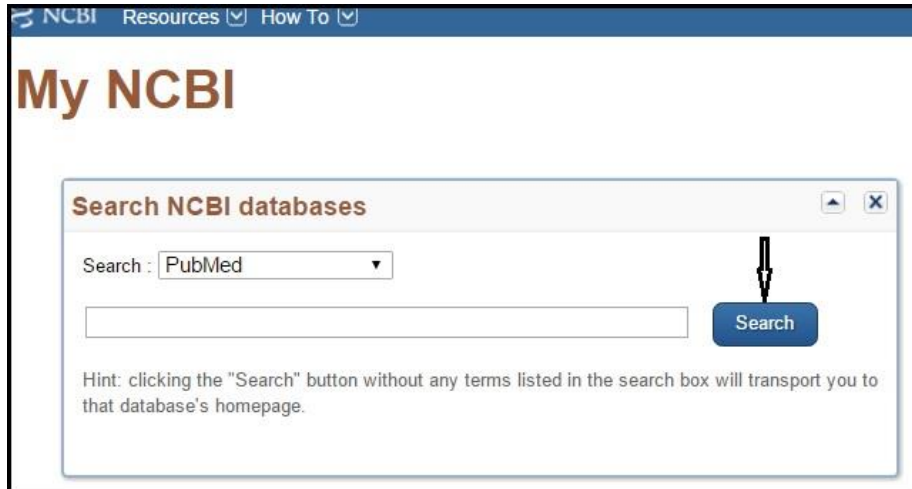


In the next page, under “Common Preferences”, click Highlighting, choose any colour, and click the “Save” button at the end of the page



Now when you run a search, the terms you searched with will be highlighted with the colour you chose.

To go back to the PubMed home page, click My NCBI (available both on the top left and top right of your screen). Then click the blue Search button



You will be taken back to the PubMed home page

Section 7: Saving your Search Strategies and Results

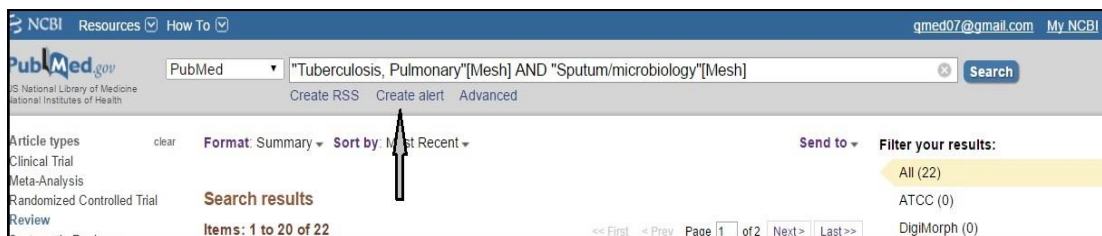
Let us consider a scenario, where we wanted to find articles about sputum tests for pulmonary tuberculosis.

- We find the MeSH Terms Tuberculosis, Pulmonary, and Sputum/microbiology (microbiologic studies about the sputum)
- We add these to the search builder and search PubMed.
- We reach the PubMed home page with a strategy - **"Tuberculosis, Pulmonary"[Mesh] AND "Sputum/microbiology"[Mesh]**
- We add two filters – Review and Free full text.
- We get 22 search results

We want to save all these articles, and also want to save the strategy for future use.

First – we save the strategy

1. Click Create Alert (Just below the search box)



2. In the next page, you get choices.

Note – by default, the “name of the saved search” will be the same as the strategy. Do change it to a meaningful title, as illustrated below.

NCBI Resources How To

My NCBI » Saved Searches

Your PubMed search

Name of saved search: Sputum diagnosis of Pulmonary TB ⊕ ← Type a meaningful title here

Search terms: "Tuberculosis, Pulmonary"[Mesh] AND "Sputum/microbiology"[Mesh] ⏏
[Test search terms](#)

Filters: Review, Free full text

Would you like e-mail updates of new search results? ← You can choose to receive email updates

No, thanks.
 Yes, please.

E-mail: qmed07@gmail.com [\(change\)](#)

Schedule:

Frequency: Monthly ⌵ ← You can choose when you want to receive email updates

Which day? the first Sunday ⌵

Formats:

Report format: Summary ⌵ ← You can choose the format of your search results with or without abstracts, HTML or text

Number of items:

Send at most: 5 items ⌵ Send even when there aren't any new results ← You can choose how many results you want to receive, from the total result numbers. (We recommend you choose at least 20)

Any text you want to be added at the top of your e-mail (optional):

← Finally - click Save

Skip saving and return to your search, or

If you wish to later go back to this search (say a week or month later), here are the steps.

1. Login in to My NCBI
2. Click My NCBI
3. Look for the topic "Sputum tests for Pulmonary TB", click and run the search
4. Depending on the time period after which you go back to this search, you may find more results
5. If you had set up email alerts, you would have received new items that came up in the search results

Saving Search Results

Having saved a search strategy, we may wish to save all or select search results. "Saving results" can be done in three ways:

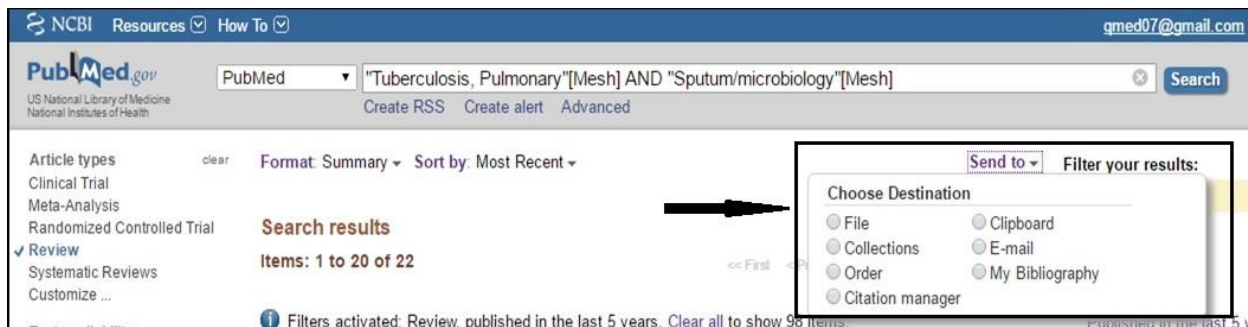
1. Saving the bibliographical details of all or selected results, on your computer's hard disk
2. Saving bibliographical details of all / selected results in your My NCBI account
3. Wherever full text articles are available, downloading them into your computer. (These cannot be stored in the My NCBI account. If you want them to be available online to you, you need a reference manager)

For saving results, we use the “Send to” option.

This link is just below the search box, on the right side.



Let us see various options available for saving the 22 results that we got



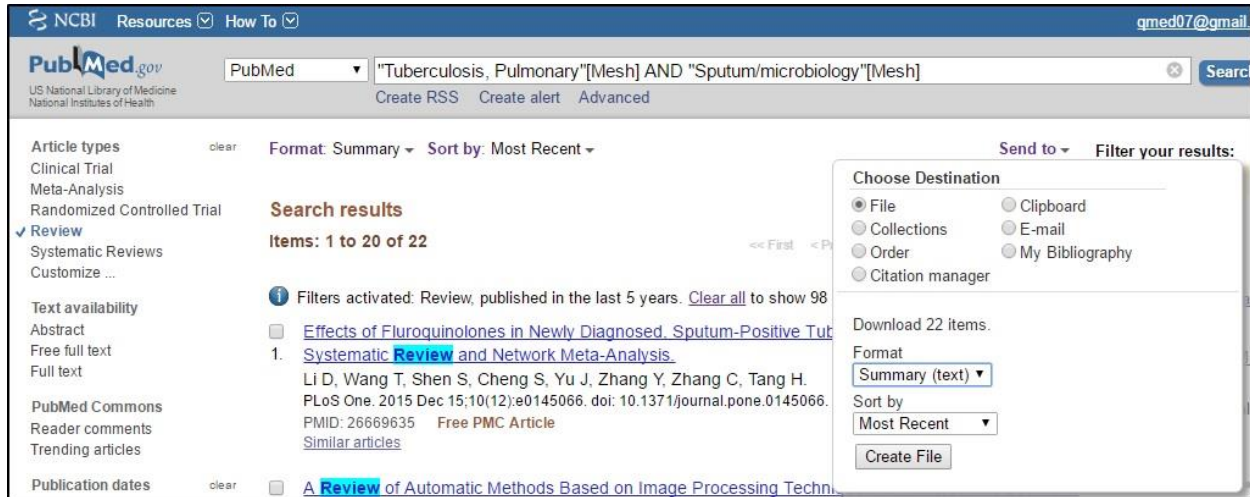
The options

- To save on your hard disk, use the first option **File** or use **E-mail** only if you use an email client like Microsoft Outlook
- To save online, we can use Collections or Email (Gmail, Yahoo etc.)
- Clipboard allows a temporary storage

We will discuss the other options, after understanding the above

The File option

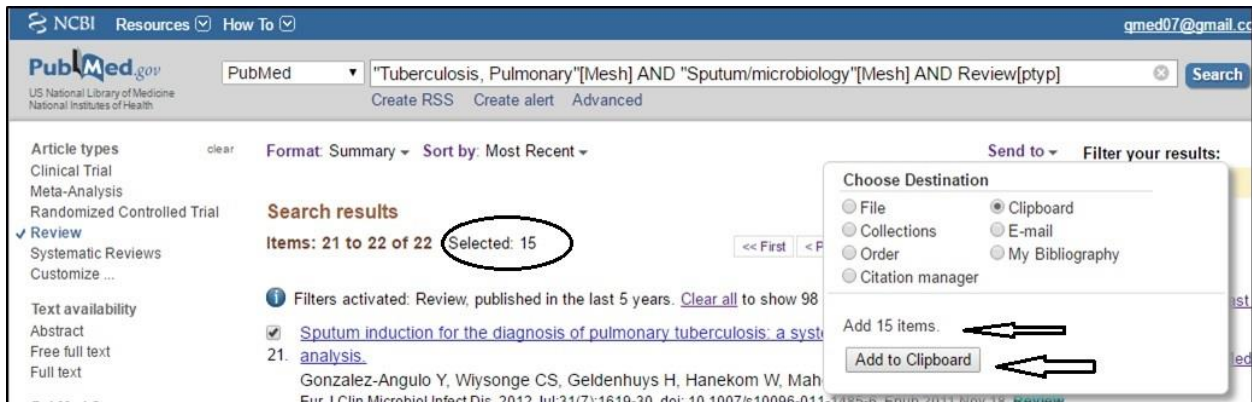
When we choose the File option, we see below, two dropdowns.

The screenshot shows the PubMed website interface. At the top, there's a search bar with the query '"Tuberculosis, Pulmonary"[Mesh] AND "Sputum/microbiology"[Mesh]'. Below the search bar, there are options for 'Format: Summary' and 'Sort by: Most Recent'. A 'Send to' dropdown menu is open, showing options like 'File', 'Clipboard', 'Collections', 'E-mail', 'Order', 'My Bibliography', and 'Citation manager'. The 'File' option is selected. Below the dropdown, there are two more dropdowns: 'Format' set to 'Summary (text)' and 'Sort by' set to 'Most Recent'. A 'Create File' button is visible at the bottom of the dropdown menu. The main search results area shows 'Items: 1 to 20 of 22' and lists several articles, including one titled 'Effects of Fluroquinolones in Newly Diagnosed, Sputum-Positive Tuberculosis: A Systematic Review and Network Meta-Analysis'.

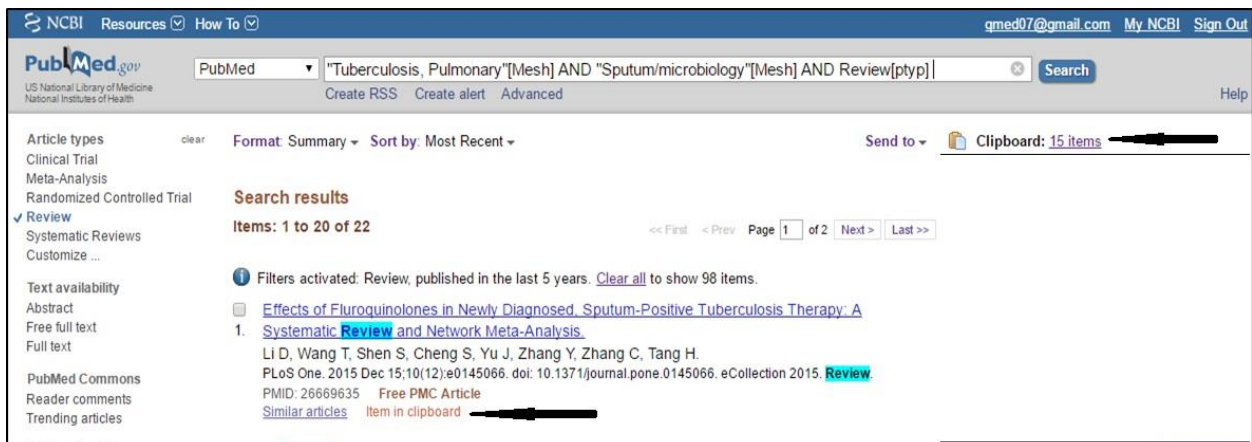
- **The first option – Format:** allows us to choose the format in which we want our results. Choose either “Summary (text)”, or “Abstract (Text)”. Summary (text) will save your items as just a bibliography list, in plain text. Abstract (Text) will save items with both bibliographic details as well as abstracts.
- **The second option - Sort by:** allow your results to be sorted in different ways. The default sort order is by the date on which an item was added to the PubMed database. Logically it will be the most recent issue of a journal, but if an older issue’s article records got added recently, they will show on top, because they were entered into PubMed very recently.
- If we want all items, just choose File, and the choices mentioned and click Create File.
- If we want specific items out of the 22 results, we need to select them first, then choose File and the format and sort options.

Clipboard

Clipboard is a temporary storage area. Sometimes we go through a fairly large number of search results. We then like to do a first selection, and then again finally choose from what we selected first. For instance, in the above search, if we wished to do this, then out of the 22 results, we may first choose some by just going through the titles. Let us assume we chose 15 out of 22 results. Once we finish, we need to click Send to and choose Clipboard, then the Add to Clipboard button



In the next page, we will still see the same 22 results. But we will see the ones we selected will display a message – “Item in clipboard”. Also we will see a link that says “Clipboard: 15 items”.



Now if we click the 15 items link on the top right, we get to see only our first choices. As we go through them again, we could read abstracts for the ones available if we wish to, and then we could keep the item or click “Remove from Clipboard” if we do not wish to select them.

Clipboard

Items: 15 [Remove all items](#)

- [Effects of Fluroquinolones in Newly Diagnosed, Sputum-Positive Tuberculosis Therapy: A Systematic Review and Network Meta-Analysis.](#)

1. [Analysis.](#)
 Li D, Wang T, Shen S, Cheng S, Yu J, Zhang Y, Zhang C, Tang H.
 PLoS One. 2015 Dec 15;10(12):e0145066. doi: 10.1371/journal.pone.0145066. eCollection 2015. Review.
 PMID: 26669635 [Free PMC Article](#)
[Similar articles](#) [Remove from clipboard](#)

If we do not wish to retain this, we click here

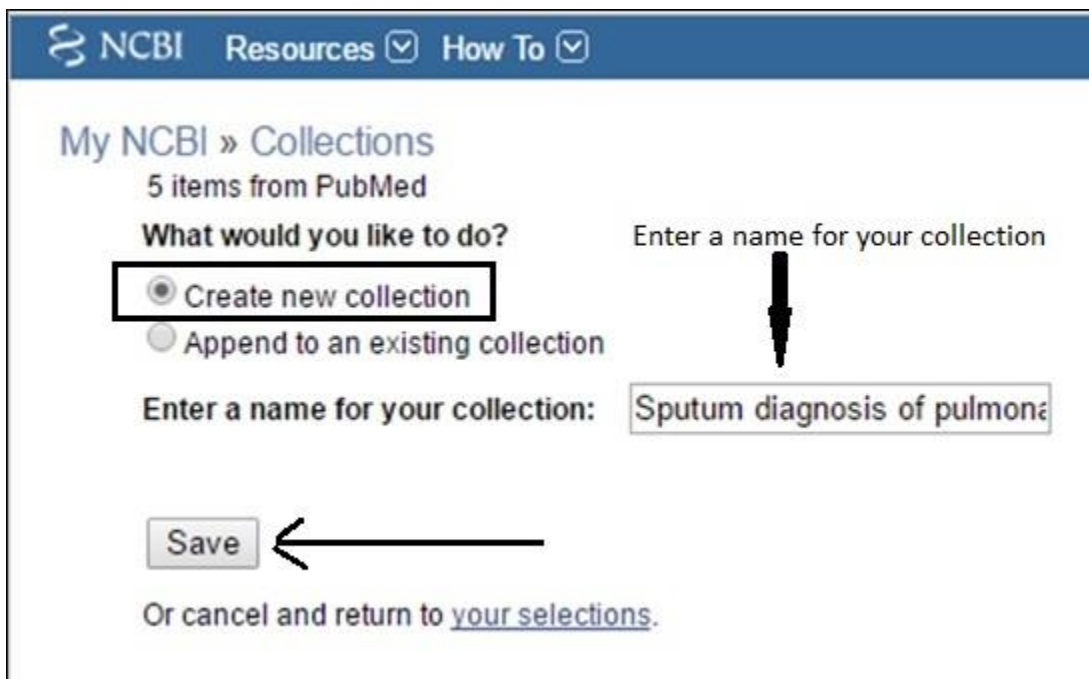
- [Chinese herbal medicine as adjuvant treatment to chemotherapy for multidrug-resistant tuberculosis \(MDR-TB\): A systematic review of randomised clinical trials.](#)

2. [review of randomised clinical trials.](#)
 Wang M, Guan X, Chi Y, Robinson N, Liu JP.
 Tuberculosis (Edinb). 2015 Jul;95(4):364-72. doi: 10.1016/j.tube.2015.03.003. Epub 2015 Mar 18. Review.
 PMID: 25861717
[Similar articles](#) [Remove from clipboard](#)

Let us assume we removed 10 and were left with five items. We can save these five items in “My NCBI” so that we can retrieve them any time. For this, we click Send to – and choose Collections



In the next page, we get two choices. Since we are creating a collection on this topic for the first time, we choose “Create new collection”.



By default – PubMed will display the name of the collection as “5 items” (the number of records we chose). We should enter a suitable name for our collection. We can use the same name as we did for the search strategy – “Sputum diagnosis of pulmonary TB”. Finally we click Save.

(When you save a strategy and choose to receive email updates, you may want to add some of the new ones to your collection. At such a time, if you click Send to – Collections, you will choose “Append to an existing collection”, and choose your collection).

We can access these items by clicking My NCBI and finding our “Collections”, just below the Saved Strategies.

(Note: From any search results page, you can straightaway add citations to a Collection. You do not have to go through the Clipboard option. It is your choice)

But before we click My NCBI, we need to do an important task: emptying the Clipboard. Or else, these items will remain in the temporary storage, and if you choose to do any other search, and wish to add some new items to create another topic collection, these will get added there too.



To view a collection, we go to My NCBI

My NCBI [Customize this page](#) | [NCBI Site Preferences](#) | [Video Overview](#) | [Help](#)

Search NCBI databases

Search: PubMed [v] [Search]

Hint: clicking the "Search" button without any terms listed in the search box will transport you to that database's homepage.

My Bibliography

Recent Activity

Time	Database	Type	Term
01:59 AM	PubMed	search	"Tuberculosis, Pulmonary"[Mesh] AND...
01:59 AM	PubMed	search	"Tuberculosis, Pulmonary"[Mesh] AND...
01:59 AM	PubMed	search	"Tuberculosis, Pulmonary"[Mesh] AND...

Saved Searches

Search Name	What's New	Last Searched
Sputum diagnosis of Pulmonary TB	0	yesterday

[Manage Saved Searches >](#)

Collections

Collection Name	Items	Settings/Sharing	Type
Favorites	edit 0	Private	Standard
My Bibliography	edit 0	Private	Standard
Other Citations	edit 0	Private	Standard
Sputum diagnosis of pulmonary TB	edit 5	Private	PubMed

[Manage Collections >](#)

Collections – are on the right side. There are three defaults and then we see our collection – Sputum diagnosis of pulmonary TB. Click the title to view it.

Note:

- As you create more collections, if you wish to delete any, click “Manage collections”, and you will find the option to delete one or more

- Clicking the “edit” link – immediately after the name of your collection, gives you more options to explore
- Manage collections – also gives you the option to merge collections, if you have created several and want to merge some

Send to – Email


Send to ▾ Filter your results:


Choose Destination


File
 Clipboard
 E-mail
 My Bibliography


Collections
 Order
 Citation manager

Search: "Tuberculosis, Pulmonary"[Mesh] AND "Sputum/microbiology"[Mesh] AND Review[ptyp]
 Filters: Review, 5 years

Format
 

Sort by
 

Number to send
 

Start from citation
 

E-mail

Subject

Additional text

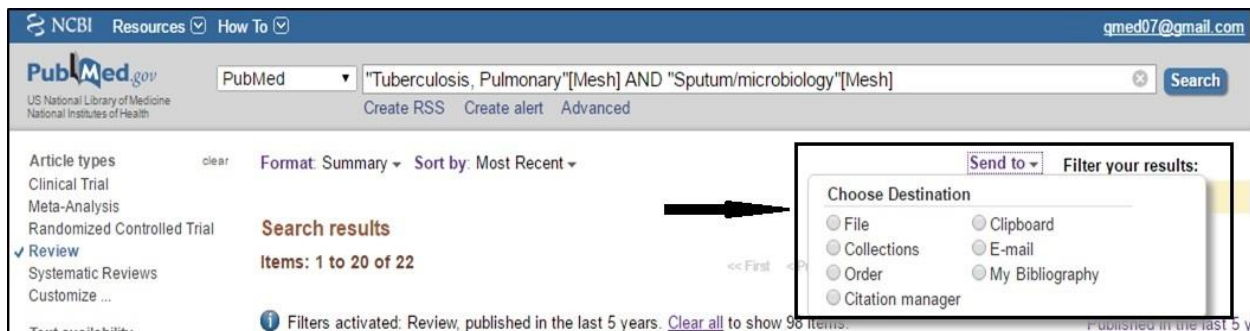
[Didn't get the message? Find out why...](#)

We could email the results to ourselves. Click “Send to”, Choose Email and then there are options as seen in the Figure above. You can

- Choose a display format you wish. (It is best to choose Summary – the default)

- Choose a sort order
- The number of items you wish to receive. (You can choose a maximum of 200)
- In case you have retrieved more than 200 items (for example – 275) and wish to go through all, then, first choose 200 as your “Number to send”
- The default “Start from Citation” number is 1
- Click email – and you will receive 200 items by email
- Then repeat the exercise. But, this time, change the “Start from Citation” number to 201. You will receive the rest of the results in another email

Let us briefly learn about the other Send to Options

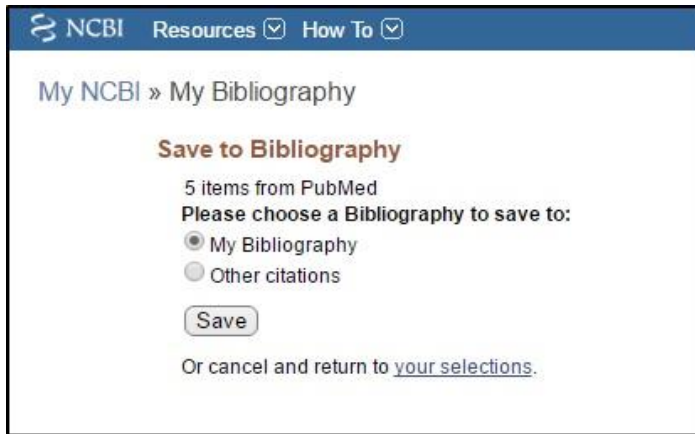


Order: Not useful to people in India, as it is about ordering articles from libraries in the USA. To use it there are formalities to complete and articles cost in US dollars.

My Bibliography: Useful for those who have publications, to save them in My NCBI. To save your publications, search for them by your author name. Once you get results, click My Bibliography and then “Add to My Bibliography”.



In the next screen, you get two options: My Bibliography and Other Citations



For articles that you are one of the authors, choose the first.

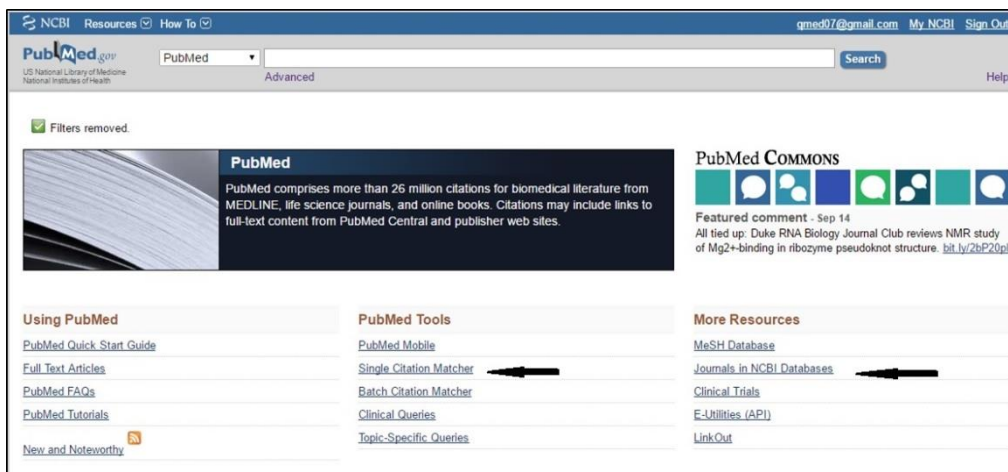
Choose 'Other Citations', where you may have been acknowledged or, if you want to save specific articles by other researchers. What you put into "Other Citations" is really your choice.

Note: You can access this collection through My NCBI, just as you can access your saved searches and collections. If you click Edit (next to My Bibliography in NCBI), you can add your non-PubMed citations too, manually. If you maintain your publications list here, there are many more options you can exercise. Please check this link to learn more: <http://www.ncbi.nlm.nih.gov/books/NBK53595/>

Citation Manager: - The last option. This option allows us to save one or more results in a format by which these can be imported into a reference manager.

Other areas of PubMed

Let us learn about two more areas of PubMed – one a feature, and one a separate database

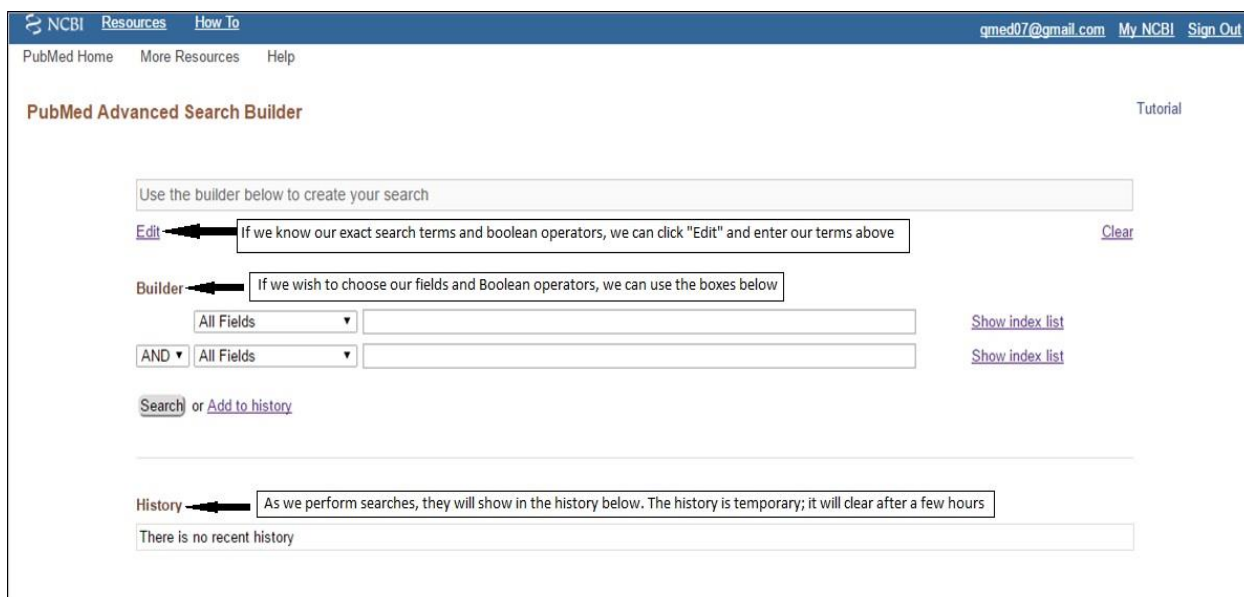


Section 8: Advanced Search Page

The Advanced Search Page in PubMed has two functions. It shows a history of our searches as we carry out searches (limited to the current day that you search) and allows us to combine search sets. To reach the Advanced Search Page, click the link “Advanced” just below the PubMed search box



The page looks like this:



We can use the first box if we know what exactly we wish to search (the right combination of MeSH, Fields and Boolean Operators). We could do that in the main PubMed search box itself. However if we use the next set of boxes, as we type, the search terms appear in the first search box, with the appropriate fields.

Building the search, using multiple search boxes

Example 1 – Query: We need to find articles by RS Gupta in the Indian Journal of Tuberculosis

As we type the first and second terms, they appear in this box, with the fields we choose

Choose a field Enter first term Enter second term

Builder

Author Gupta RS

AND Journal The Indian journal of tuberculosis

AND All Fields

Show index list Show index list Show index list

Search or Add to history

This box appears when we fill in the second search term

We can click this minus (-) sign if we wish to delete this box

When we come to this page, we first see only two boxes under “Builder”

We choose “Author” as the first field and enter – Gupta RS

We choose the second field – “Journal”, and enter – The Indian journal of tuberculosis

As we type, the auto-suggest feature of PubMed shows these items and we can choose the author or journal with the mouse and click.

Since we want articles by RS Gupta in Indian J Tuberculosis, we retain Boolean ‘AND’

Notice that as we type the second search term, a third box appears below, in anticipation that we may want to add another term.

Also notice that as we enter details in these boxes, our search gets added into the topmost search box with appropriate fields. If we click the Search button, we are executing the search and will see PubMed results.

If we click the “Add to history” link, we will see this query in the History area below. This is to enable us to create more such sets and work further if required.

History		Download history	Clear history
Search	Add to builder	Query	Items found Time
#1	Add	Search (Gupta RS[Author]) AND "The Indian journal of tuberculosis"[Journal]	2 07:38:23

Example 2 – Query: We wish to find articles about Tuberculosis published in the last five years. We want them to either be from English language journals, or have abstracts. (This way, for foreign language journals we have abstracts, and for English language journals we may or may not have abstracts, but could get full articles from some source)

If we search Tuberculosis[MeSH] and apply all three filters – that is – Abstract, Last five years and English, we are applying a Boolean AND for all three. We need to plan our search first. We will do the following steps.

1. Apply the Last five years filter
2. Apply the English language filter.
3. Now if we check the Advanced Search page, we will have a strategy with both filters.

History		Download history Clear history		
Search	Add to builder	Query	Items found	Time
#3	Add	Search tuberculosis[mesh] Filters: published in the last 5 years; English	18232	08:53:29
#2	Add	Search tuberculosis[mesh] Filters: published in the last 5 years	16534	08:53:20
#1	Add	Search tuberculosis[mesh]	177534	08:51:52

4. Next, we remove the English language filter, and add the abstract filter. If we go to the Advanced Search page, it will look like this:

History		Download history Clear history		
Search	Add to builder	Query	Items found	Time
#4	Add	Search tuberculosis[mesh] Filters: Abstract; published in the last 5 years	14465	08:53:59
#3	Add	Search tuberculosis[mesh] Filters: published in the last 5 years; English	18232	08:53:29
#2	Add	Search tuberculosis[mesh] Filters: published in the last 5 years	16534	08:53:20
#1	Add	Search tuberculosis[mesh]	177534	08:51:52

5. Now we need to combine #3 with #4 using the Boolean Operator 'OR'. The easiest way of doing this is to click the word 'Add' next to search #3; then click the word 'Add' next to search #4. Both terms get added to the builder. Then we change the Boolean operator to 'OR'

Builder

or [Add to history](#)


History [Download history](#) [Clear history](#)

Search	Add to builder	Query	Items found	Time
#4	Add	Search tuberculosis[mesh] Filters: Abstract; published in the last 5 years	14465	08:53:59
#3	Add	Search tuberculosis[mesh] Filters: published in the last 5 years; English	16534	08:53:29
#2	Add	Search tuberculosis[mesh] Filters: published in the last 5 years	18232	08:53:20
#1	Add	Search tuberculosis[mesh]	177534	08:51:52

6. At this point we need to take care of one more thing. Since we applied filters, before executing the search, we need to clear filters or else, we will not get the right results. We need to scroll to the top of the page to do this

[PubMed Home](#)
[More Resources](#)
[Help](#)

PubMed Advanced Search Builder


 Filters activated: Abstract, published in the last 5 years. [Clear all](#)

7. Now if we again scroll down, we can click 'Add to history', so that our Boolean 'OR' combination will come in the history as #5. If we click 'search', it gets added to the History and also displays results.

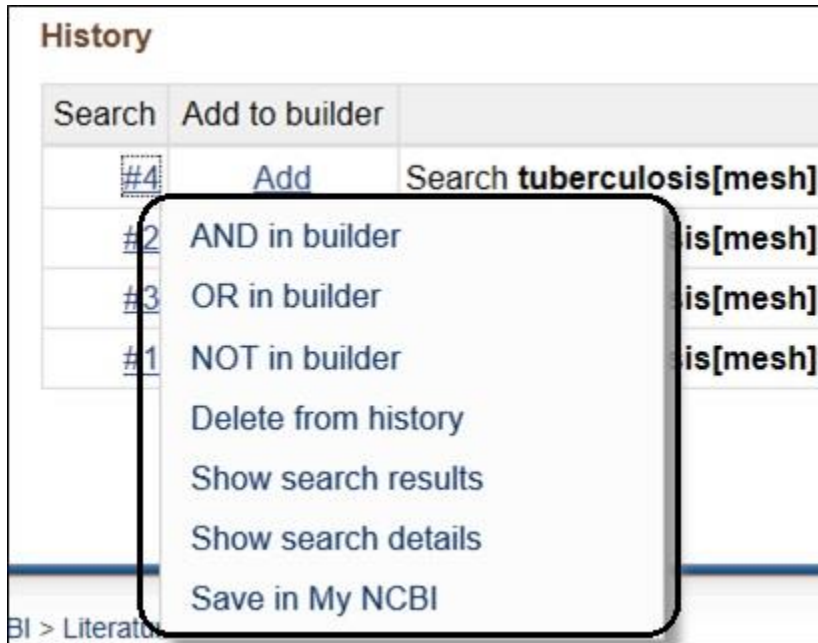
History [Download history](#) [Clear history](#)

Search	Add to builder	Query	Items found	Time
#5	Add	Search ((tuberculosis[mesh] AND \"last 5 years\"[PDat] AND English[lang])) OR (tuberculosis[mesh] AND hasabstract[text] AND \"last 5 years\"[PDat])	17766	10:04:25
#4	Add	Search tuberculosis[mesh] Filters: Abstract; published in the last 5 years	14465	08:53:59
#2	Add	Search tuberculosis[mesh] Filters: published in the last 5 years	18232	08:53:29
#3	Add	Search tuberculosis[mesh] Filters: published in the last 5 years; English	16534	08:53:20
#1	Add	Search tuberculosis[mesh]	177534	08:51:52

Note:

- a. Clicking the word "Add" before any search strategy, adds it to the builder as above

b. Clicking the Search # - gives us several options



- If we choose the option - AND in builder, our term will be added, and the operator AND will be chosen (we need not make a change in the dropdown). The same is applicable to the other two operators
- If we choose “Delete from history”, it will delete that line from our search history
- Show search results – shows us the results for the search. This can also happen if we click the result numbers on the right side of the strategy
- Show search details, displays how the query was executed
- Save in My NCBI saves that line’s strategy in your My NCBI account

We can save our history by clicking the Download History button just above the History table.

Search	Add to builder	Query	Items found	Time
#5	Add	Search ((tuberculosis[mesh] AND "last 5 years"[PDat] AND English[lang])) OR (tuberculosis[mesh] AND hasabstract[text] AND "last 5 years"[PDat])	17766	10:04:25
#4	Add	Search tuberculosis[mesh] Filters: Abstract; published in the last 5 years	14465	08:53:59
#2	Add	Search tuberculosis[mesh] Filters: published in the last 5 years	18232	08:53:29
#3	Add	Search tuberculosis[mesh] Filters: published in the last 5 years; English	16534	08:53:20
#1	Add	Search tuberculosis[mesh]	177534	08:51:52

The history gets downloaded as a “.csv” file. When we open it, we can save it as an Excel file

	A	B	C	D
1	Recent queries in	pubmed		
2	Search	Query	Items found	Time
3	#5	Search ((tuberculosis[mesh] AND "last 5 years"[PDat] AND English[lang])) OR (tuberculosis[mesh] AND hasabstract[text] AND "last 5 years"[PDat])	17766	10:04:25
4	#4	Search tuberculosis[mesh] Filters: Abstract; published in the last 5 years	14465	10:13:27
5	#3	Search tuberculosis[mesh] Filters: published in the last 5 years; English	16534	8:53:20
6	#2	Search tuberculosis[mesh] Filters: published in the last 5 years	18232	8:53:29
7	#1	Search tuberculosis[mesh]	177534	10:12:04

This is an important process especially when we carry out searches for writing a Systematic Review, as documentation of every step is important.

One more useful feature in the Advanced Search Page

On the extreme right side of the search builder, we see a link called “Show index list”. How do we use this? If we are searching for a MeSH term, we can see the subheadings here itself. We choose the field MeSH terms on the extreme left, enter our term – say Tuberculoma, in the search box, and on the right, we can click “Show index list”

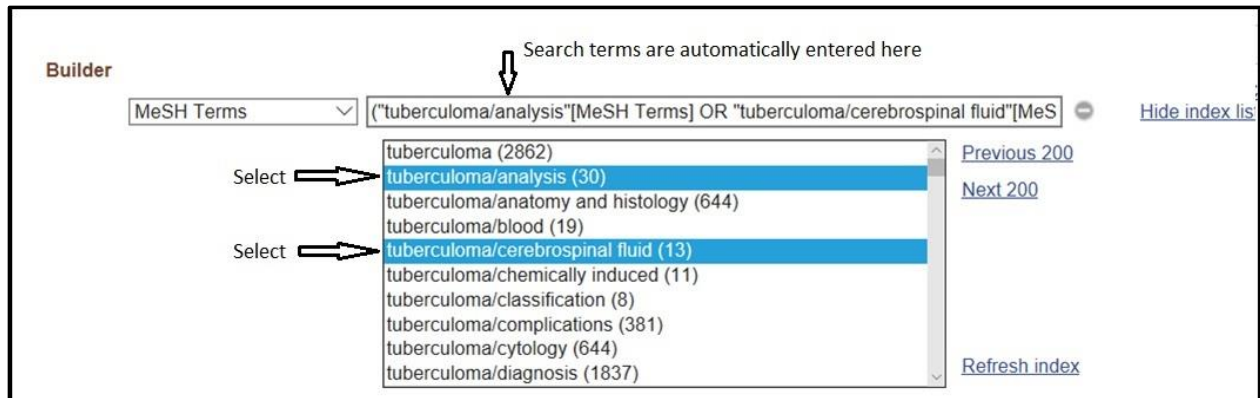
The screenshot shows a search builder interface. On the left, there is a dropdown menu labeled 'MeSH Terms'. The search box contains the term 'tuberculoma'. To the right of the search box is a 'Hide index list' link. Below the search box, a dropdown menu is open, displaying a list of subheadings for 'tuberculoma' with their respective counts:

- tuberculoma (2862)
- tuberculoma/analysis (30)
- tuberculoma/anatomy and histology (644)
- tuberculoma/blood (19)
- tuberculoma/cerebrospinal fluid (13)
- tuberculoma/chemically induced (11)
- tuberculoma/classification (8)
- tuberculoma/complications (381)
- tuberculoma/cytology (644)
- tuberculoma/diagnosis (1837)

Navigation links are visible on the right side of the dropdown menu: 'Previous 200', 'Next 200', and 'Refresh index'.

In this figure – note that when we clicked “Show index” a drop down of the index terms appears.

We can click more than one choice, by keeping the Ctrl key pressed. As we choose, our terms are automatically entered into the search box above.



Once we finish making choices, we can click the Search button or Add to History link, below

Summary:

The Advanced page button has two major sections – a Search Builder and History

Search builder: We can build our search by:

1. Selecting fields
2. Entering our search term
3. Choosing one or more terms from the index
4. Choosing Boolean operators

History:

1. We can view our history
2. We can combine sets in the history by clicking the “Add” link, or by clicking the Search term# and choosing the right options
3. We can download our history
4. We can delete the history

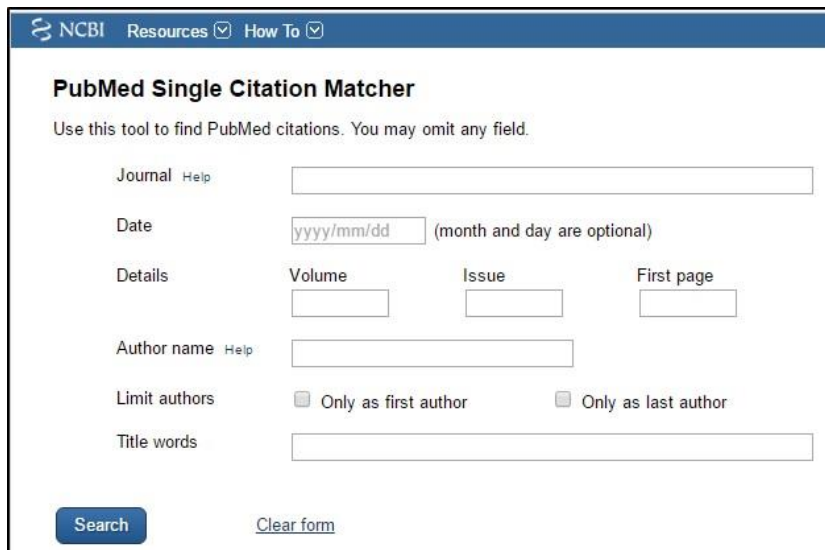
Section 9: The Single Citation Matcher

We often are presented with incomplete or incorrect citations, in several contexts. We may attend a Conference session, where a speaker presents a graph or table on a slide and puts up an incomplete reference below.

Example: Kumar V. et al. Forecasting malaria ... 2014

We may read an article in a journal, where the list of references has some that are incomplete or even incorrect. And based on these, if we wish to locate the full article, we have a problem. The Single Citation Matcher comes to our rescue for citations that are from PubMed indexed journals.

If we click the link Single Citation Matcher, we get a screen like this:



The screenshot shows the PubMed Single Citation Matcher interface. At the top, there is a navigation bar with the NCBI logo and links for 'Resources' and 'How To'. The main heading is 'PubMed Single Citation Matcher'. Below the heading, a sub-heading reads 'Use this tool to find PubMed citations. You may omit any field.' The form contains several input fields: 'Journal' with a 'Help' link, 'Date' with a 'yyyy/mm/dd' placeholder and '(month and day are optional)' text, 'Details' section with 'Volume', 'Issue', and 'First page' fields, 'Author name' with a 'Help' link, 'Limit authors' section with two checkboxes: 'Only as first author' and 'Only as last author', and 'Title words'. At the bottom left is a blue 'Search' button, and at the bottom center is a 'Clear form' link.

For our example - Kumar V. et al. Forecasting malaria ... 2014, what we need to fill in is

Kumar V – in the Author box

Forecasting malaria – in the Title words box and

2014 in the Date box

If we click the Search button, PubMed translates our query, based on the principles we learned and runs a query - Kumar V[author] AND 2014[mdat] AND forecasting malaria and returns one precise result

NCBI Resources How To

PubMed 2014[pdat] AND Kumar V[author] AND forecasting malaria

Create RSS Create alert Advanced

Format: Abstract Send to

Malar Res Treat. 2014;2014:482851. doi: 10.1155/2014/482851. Epub 2014 Jul 23.

Forecasting malaria cases using climatic factors in delhi, India: a time series analysis.

Kumar V¹, Mangal A¹, Panesar S¹, Yadav G¹, Talwar R¹, Raut D¹, Singh S¹.

Author information

Abstract

Background. Malaria still remains a public health problem in developing countries and changing environmental and climatic factors pose the biggest challenge in fighting against the scourge of malaria. Therefore, the study was designed to forecast malaria cases using climatic factors as predictors in Delhi, India. Methods. The total number of monthly cases of malaria slide positives occurring from January 2006 to December 2013 was taken from the register maintained at the malaria clinic at Rural Health Training Centre (RHTC), Najafgarh, Delhi. Climatic data of monthly mean rainfall, relative humidity, and mean maximum temperature were taken from Regional Meteorological Centre, Delhi. Expert modeler of SPSS ver. 21 was used for analyzing the time series data. Results. Autoregressive integrated moving average, ARIMA (0, 1, 1) (0, 1, 0)(12), was the best fit model and it could explain 72.5% variability in the time series data. Rainfall (P value = 0.004) and relative humidity (P value = 0.001) were found to be significant predictors for malaria transmission in the study area. Seasonal adjusted factor (SAF) for malaria cases shows peak during the months of August and September. Conclusion. ARIMA models of time series analysis is a simple and reliable tool for producing reliable forecasts for malaria in Delhi, India.

PMID: 25147750 PMCID: PMC4132340 DOI: 10.1155/2014/482851

[PubMed] Free PMC Article

f t

Then choose the Format 'Summary (text)'

NCBI Resources How To

PubMed Kumar V[author] AND 2014[pdat] AND forecasting malaria

Create RSS Create alert Advanced

Format: Abstract

Format

- Summary
- Summary (text)
- Abstract
- Abstract (text)
- MEDLINE
- XML
- PMID List

482851. doi: 10.1155/2014/482851. Epub 2014 Jul 23.

ia cases using climatic factors in delhi, India: a time series analysis.

nesar S¹, Yadav G¹, Talwar R¹, Raut D¹, Singh S¹.

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ll remains a public health problem in developing countries and changing environmental and cl

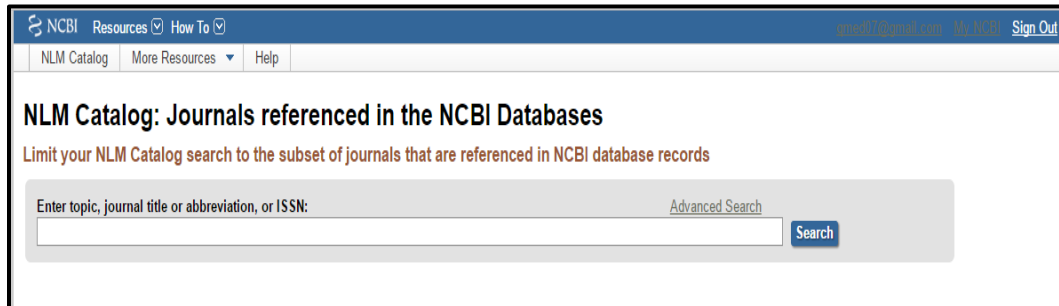
tion against the scourge of malaria. Therefore, the study was designed to forecast malaria

Then, you get the properly formatted reference as below

1: Kumar V, Mangal A, Panesar S, Yadav G, Talwar R, Raut D, Singh S. Forecasting malaria cases using climatic factors in delhi, India: a time series analysis. Malar Res Treat. 2014;2014:482851. doi: 10.1155/2014/482851. Epub 2014 Jul 23. PubMed PMID: 25147750; PubMed Central PMCID: PMC4132340.

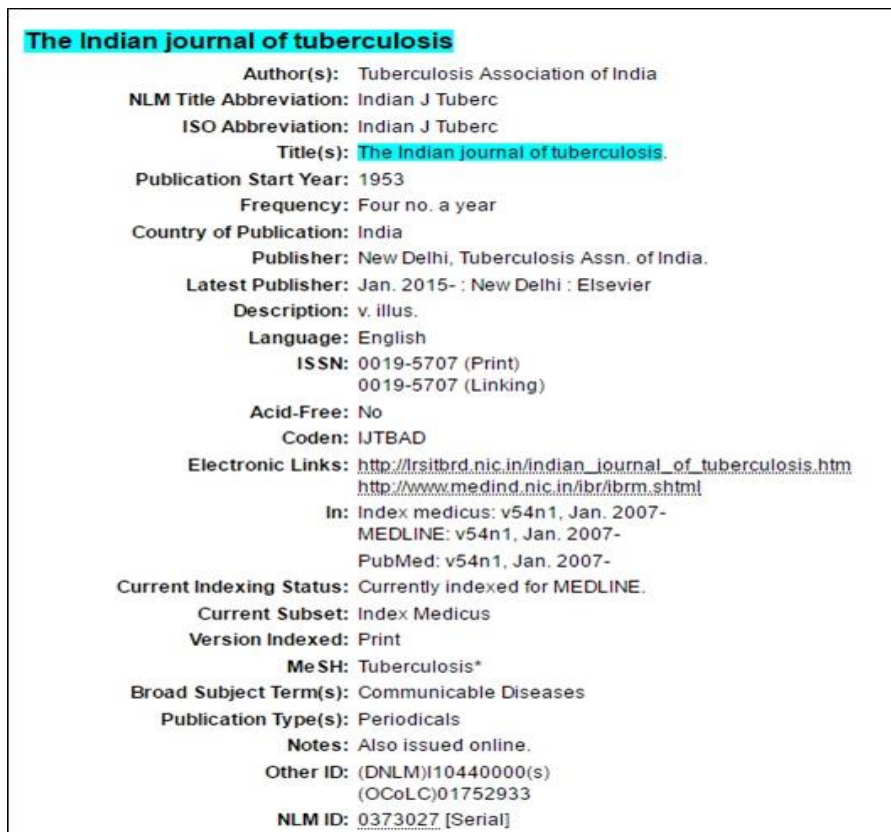
Section 10: Journals in NCBI Databases

This is the second link on the third column of the PubMed Homepage. When you click, you get a screen like this. We can search for a journal by its full name, abbreviation or ISSN. Once we locate it, we get all details about it.



The screenshot shows the NLM Catalog search interface. At the top, there are navigation links for 'NCBI Resources' and 'How To'. Below that, there are tabs for 'NLM Catalog', 'More Resources', and 'Help'. The main heading is 'NLM Catalog: Journals referenced in the NCBI Databases'. Below the heading, there is a search input field with the placeholder text 'Enter topic, journal title or abbreviation, or ISSN:'. To the right of the input field is an 'Advanced Search' link and a 'Search' button.

For example if we search for The Indian Journal of Tuberculosis we get the following



The screenshot shows the search results for 'The Indian journal of tuberculosis'. The title is highlighted in blue. The results include the following information:

- Author(s):** Tuberculosis Association of India
- NLM Title Abbreviation:** Indian J Tuberc
- ISO Abbreviation:** Indian J Tuberc
- Title(s):** The Indian journal of tuberculosis.
- Publication Start Year:** 1953
- Frequency:** Four no. a year
- Country of Publication:** India
- Publisher:** New Delhi, Tuberculosis Assn. of India.
- Latest Publisher:** Jan. 2015- : New Delhi : Elsevier
- Description:** v. illus.
- Language:** English
- ISSN:** 0019-5707 (Print)
0019-5707 (Linking)
- Acid-Free:** No
- Coden:** IJTBAD
- Electronic Links:** http://rsitbrd.nic.in/indian_journal_of_tuberculosis.htm
<http://www.medind.nic.in/ibr/ibrm.shtml>
- In:** Index medicus: v54n1, Jan. 2007-
MEDLINE: v54n1, Jan. 2007-
PubMed: v54n1, Jan. 2007-
- Current Indexing Status:** Currently indexed for MEDLINE.
- Current Subset:** Index Medicus
- Version Indexed:** Print
- Me SH:** Tuberculosis*
- Broad Subject Term(s):** Communicable Diseases
- Publication Type(s):** Periodicals
- Notes:** Also issued online.
- Other ID:** (DNLM)I10440000(s)
(OCoLC)01752933
- NLM ID:** 0373027 [Serial]

We can also search by topic. For example, Tuberculosis and retrieve journals covering tuberculosis.

NCBI Resources How To

NLM Catalog NLM Catalog tuberculosis

Create alert Advanced

Journal subsets clear Summary 20 per page Sort by Publication Date Send to:

Referenced in the NCBI DBs

Currently indexed in MEDLINE

Customize ...

Languages

English

Spanish

Customize ...

Clear all

Show additional filters

Search results

Items: 1 to 20 of 157

<< First < Prev Page 1 of 8 Next > Last >>

Filters activated: Referenced in the NCBI DBs. [Clear all](#) to show 10664 items.

[Journal of clinical tuberculosis and other mycobacterial diseases](#)

1. NLM Title Abbreviation: J Clin Tuberc Other Mycobact Dis
ISSN: 2405-5794 (Electronic)
[London] : Elsevier Ltd., [2015]-
Not currently indexed for MEDLINE

There are 157 journals that cover tuberculosis in PubMed

Note: This has already limited the entire NLM Catalog to only journals in the databases

If we wish to find out how many of these journals are Medline indexed, that is, their articles will get MeSH Terms, we need to uncheck the “Referenced in the NCBI DBs” filter, and click the ‘Currently indexed in Medline’ filter.

NCBI Resources How To

NLM Catalog NLM Catalog tuberculosis

Create alert Advanced

Journal subsets clear Summary 20 per page Sort by Publication Date

Referenced in the NCBI DBs

Currently indexed in MEDLINE

Customize ...

Languages

English

Spanish

Customize ...

Clear all

Show additional filters

Search results

Items: 10

Filters activated: Currently indexed in MEDLINE. [Clear all](#)

[Tuberkulēz i bolezni lēgkikh](#)

1. Rossiiskoe obshchestvo ftiziatrov.
NLM Title Abbreviation: Tuberk Bolezni Legkih
ISSN: 2075-1230 (Print) ; 2075-1230 (Linking)
Moskva : Niu Terra
Currently indexed for MEDLINE

Summing up:

PubMed is a structured database and can be searched using a very structured approach. The four principles are at the core of searching. It is of course important to understand the scope of PubMed – what it covers and does not cover; and the structure of records. In this workshop and manual we have covered the most important aspects, but there is always more to learn as we do more searching and research.

For additional learning

1. Using MeSH to Build a Better Query - <https://www.youtube.com/watch?v=uyF8uQY9wys>

2. Using Filters:

<https://www.youtube.com/watch?v=696R9GbOyvA>

3. Saving searches and creating email alerts

<https://www.nlm.nih.gov/bsd/viewlet/myncbi/saving/>

4. Creating Collections

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

5. Searching for Journals in the NLM Catalog

<https://www.nlm.nih.gov/bsd/viewlet/nlmcatalog/journals.html>

(Note that when the video starts, there is an older version of the PubMed homepage, and the link to the Journals in NCBI is at a different location from what it is now)

The above links are part of a much larger list, accessible at:

<https://learn.nlm.nih.gov/rest/training-packets/T0042010P.html>

Appendix

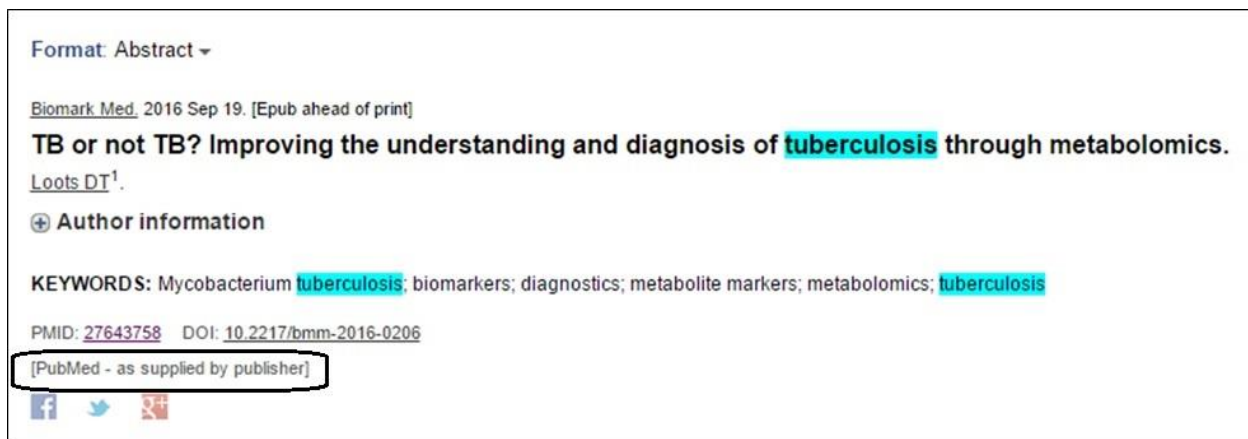
A note about MeSH searches and what they miss retrieving.

We just learned how searching using MeSH terms makes a big difference to our searches; we are able to get most relevant articles. But these searches do miss out on some important results. Let us understand this, and we will also learn how we can work around this issue. The results we will miss are:

1. PubMed records that are not yet indexed with MeSH terms
2. PubMed records of journals that do not get indexed with MeSH Terms

PubMed records not yet indexed:

When we learned about MeSH indexing in Principle II, we learned that indexers in the National Library of Medicine add MeSH terms. Indexers are subject specialists and are also experts in using the MeSH database to index articles. Adding MeSH terms to articles they read obviously involves some time. And so, the latest records in PubMed will not have MeSH Terms. Such records have a note: “**PubMed - as supplied by publisher**” in the Abstract Display Format.



The screenshot shows a PubMed abstract record for the article "TB or not TB? Improving the understanding and diagnosis of tuberculosis through metabolomics." by Loots DT¹. The record includes the journal name "Biomark Med, 2016 Sep 19. [Epub ahead of print]", the title, author information, and keywords: "Mycobacterium tuberculosis; biomarkers; diagnostics; metabolite markers; metabolomics; tuberculosis". The PMID is 27643758 and the DOI is 10.2217/bmm-2016-0206. A red box highlights the note "[PubMed - as supplied by publisher]" at the bottom of the record.

Note: There are two other such notes in the Abstract Display of PubMed records.

- a) **PubMed - In process:** such records are being processed for indexing by indexers
- b) **PubMed - Indexed for Medline:** these records have MeSH terms

Journals whose article records do not get MeSH terms:

These include the PubMed Central journals which are not indexed in MEDLINE. PubMed Central is an archive* of journal articles. This entire archive is included in PubMed. But only some of these journals are indexed with MeSH terms, and these journals are called MEDLINE indexed journals.

*An archive is a website that stores articles from journals whose publishers deposit a copy of the journal in the archive. The primary item in an archive is the article, and bibliographic details of the article are available on display. But in bibliographic databases like PubMed, the primary item is the bibliographic record. The full article may or may not be present.

What is Automatic Term Mapping?

When we do a word search, one of the principles PubMed uses in searching literature is automatic term mapping (ATM). Whichever phrase that we enter, PubMed first looks for whether the phrase is a MeSH term. If no, it looks for whether it is the name of the author followed by if it is a journal name. If not, it breaks the phrase down and the process continues. If the phrase is a MeSH term, then it does a MeSH search (stops there, doesn't look for whether it is an author or journal name) followed by a word search for the whole phrase and the words in the phrase.

For example if we do a word search for Chagas cardiomyopathy, the search details would be as follows:

"chagas cardiomyopathy"[MeSH Terms] OR ("chagas"[All Fields] AND "cardiomyopathy"[All Fields]) OR "chagas cardiomyopathy"[All Fields]

If we want PubMed not to do automatic term mapping, then we need to put the phrase or word in quotes. For example if we do word search for "Chagas cardiomyopathy" (include the quote in the search box), then the search details would be as follows:

"Chagas cardiomyopathy"[All Fields]

This means the search will include all the articles where the phrase "Chagas cardiomyopathy" is there anywhere in the bibliographic structure of an article (includes title, authors, journal name and journal details, author affiliation, key words, abstract, publication date)

Managing References using Mendeley

Section 1: Why reference management and why Mendeley?

We often spend a lot of time searching for relevant literature to understand the body of knowledge before undertaking our own research work. Once we have done the hard work, it is important that we store it in an organized manner so that we may retrieve it easily when required and cite them in a research paper or dissertation. Otherwise, we will be wasting time searching for the same thing again and again. This systematic process of organizing the searched literature in an easily searchable, retrievable and citable fashion is called as 'Reference Management'. In this manual, we will learn principles and methods of creating and managing a personal library of documents in an electronic format, sharing them with our colleagues and peers and citing them in our written work, as required.

'Referencing' is a system used in written work to indicate, where from evidence, ideas, theories, facts, or any other information, were found by providing a description of the sources. In plain English, this is a way of acknowledging the original source of information.

What is a 'reference'?

Anything we cite and refer to in our written work to indicate the original source of the idea constitutes a 'reference' which can be any of the following.

- Scientific articles
- Books, chapters in books, atlases
- Policies, Guidelines, Reports
- Official sources of statistics
- Personal communication
- Unpublished documents
- Webpages, blogs
- Links to images/photographs, videos, datasets and other resources posted on data storing applications like Google Drive, Dropbox etc.

Why should we use references?

There are many reasons for this some of which are listed below:

- To avoid plagiarism* by giving credit to the original source of an idea, piece of information or resource.

- To validate and support your work with the authoritative work of another author.
- To demonstrate your knowledge and familiarity with a topic that you have researched.
- To help readers find the original source of information or ideas that you have used.

**Plagiarism is presenting the words, ideas, data, images or media of someone else as your own without giving credit to the original source.*

What text needs a reference in an article?

- All statements or reported data not based on your data
- Any special methods/programmes used
- Anything that would otherwise be plagiarism

It is always a good practice to refer to the latest, the best and the most relevant reference when choosing from many. It is also advised that the author keeps a copy of all the references cited.

What text does not need a reference in an article?

Anything that is considered common knowledge does not need a reference, like general information which would be known by any reasonably informed member of public (like 'India is one of the most populous countries in the world') or discipline specific information which would be known by any of your peers (like 'Tuberculosis is a bacterial disease caused by *Mycobacterium tuberculosis*'). Also, results of your study and your own interpretations of others' findings need not be referenced.

Why an electronic reference manager?

Acknowledging the original source of information conventionally has two components: 1) in-text citation and 2) Reference list or bibliography. In-text citation refers to the way we cite in the main text or narrative and may be a number (bracketed number like (1) or superscripted number like ¹ or other variations) or take the form of '(author-year)' depending on the style of referencing. Bibliography is a list of all references that is inserted at the end of the written article and includes full description of the source documents cited in the article. The list of references may be arranged in the order in which it is cited in the text or in an alphabetical order.

Note: There is a school of thought which tries to differentiate between the terms 'reference list' (includes only those references which are cited in the text) and 'bibliography' (defined as a complete list of sources consulted about a topic whether cited or not). While we acknowledge this, we see no pragmatic

advantage of maintaining this distinction (other than adding jargon) and also wonder why we should list sources which are not cited in the document. Hence, we will be using both terms interchangeably and with the same intended meaning in this manual.

There are thousands of reference styles, but these can be broadly classified into three styles:

1. **Numbered style**
2. **Author-Date Style**
3. **Footnote style**

In '**Numbered style**', the in-text citation is a number, and the bibliography is a sequentially numbered list of references at the end of the text which provides full details of the corresponding in-text citation. Vancouver style is an example of numbered style and is commonly used in the field of Medicine. Other examples of numbered style include IEEE (Institute of Electrical and Electronics Engineers) style and AIP (American Institute of Physics) style.

In '**Author-Date style**', in-text citation generally includes author(s)' surname/last name along with date of publication in round brackets and bibliography is listed at the end of the document, in alphabetical order of first author's surname/last name. Examples of author-date style include the Harvard style and APA (American Psychological Association) style.

In '**Footnote style**', in-text citations are in the form of superscripted numbers and details of the reference are provided as footnotes at the end of the page. In addition, a complete list of references is provided at the end of the document, in alphabetical order of first author's surname/last name. Chicago style is an example of Footnote style.

While each journal broadly subscribes to one of these styles, they include variations of their own. It will not be an exaggeration to say there are almost as many styles as there are journals and it is humanely not possible for a researcher to remember each one of these. The different styles demanded by journals, both for in-text citations and bibliographies, require significant time and attention to minute detail (including variations in bold fonts, commas, semicolons, italics etc.) that constitute a tedious obstacle on the road to publication for all authors. Many a time, we may need to revise and resubmit

the article to another journal and this revision may involve complete change in reference style to suit the need of the new journal.

Fortunately, there are many software available for reference management. While some are freely available for use and distribution, others are proprietary in nature. Considering the resource-constrained settings for operational research in low and middle income countries, it may not be possible for researchers to pay for using the reference management software. Hence, as a policy, the International Union Against Tuberculosis and Lung Disease supports and encourages the use of open access tools in operational research. There are many free tools for reference management: 'Mendeley' (<https://www.mendeley.com/>) is one of the most popular and user-friendly tools among them.

Why Mendeley?

We have chosen Mendeley over other tools for the following reasons:

- **Open Access:** free to use, distribute and teach
- Compatible across **operating systems** (Windows, Mac, Linux) and **browsers** (Chrome, Firefox, Safari, Internet Explorer)
- It works on **desktop computer or laptop, on the mobile phone or iPad, or can be accessed from any modern browser**. While desktop application offers the most complete experience - allowing you to organize, collaborate and discover, as well as use the citation plugin to cite as you write in Microsoft Word or LibreOffice, the other versions - Web and Mobile - offer you the ability to access your references on the go, as well as making notes and annotations.
- **User-friendly** tool to cite references and allows to choose from more than 6000 styles or create new customized styles to suit individual needs
- Mendeley is an **academic social network**: It allows you to promote yourself and your research to the world, to connect with other researchers in your field and to access the latest discussion on relevant topics. We can create groups in Mendeley to share the references with our collaborators.
- Mendeley is also a **crowd-sourced database** providing access to millions of references added by Mendeley users across the globe.
- It provides access to great resources for self-learning and teaching (<https://community.mendeley.com/guides>) and for support and help, if required (<http://support.mendeley.com/>)

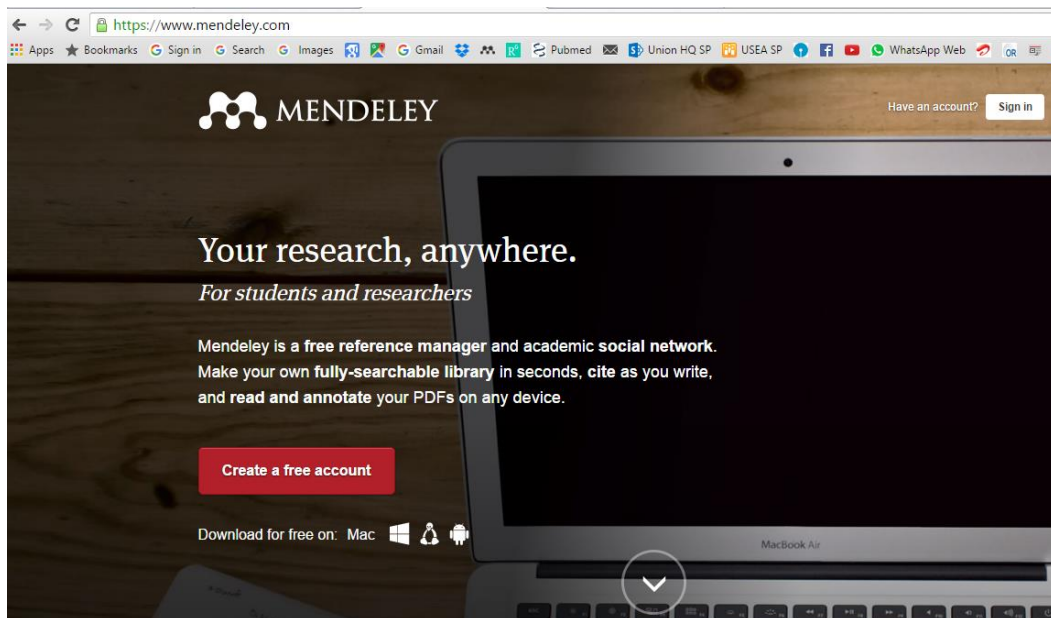
Section 2: Installation and overview of the software

(Before you start, copy and paste the 'Mendeley course' folder provided to you in root of C drive.)

In this section, we will deal with how to install the 'Mendeley' software in your computer followed by a brief overview of the software.

Step 1: Creation of account

Visit the official website of Mendeley <https://www.mendeley.com/>. In the page that you see below click on "create a free account".



To create an account, you have to add your email address (avoid adding official email as that is likely to change with change in job), first name, last name and password as shown below.

Note: Please remember this email id and password as this will be required during the installation of the Mendeley desktop.

Create a Mendeley account

One account for all your research.

Email address

hemantjipmer@yahoo.com

First name

Hemant

Last name

Shewade

Password

.....

Continue >

Then, enter your institution name (optional), followed by field of study and academic status as shown below.

Please enter your institution

Enter your current institution

[x Skip this step](#)

[Save and continue >](#)

Hi Hemant!

Let's complete your public profile.

Medicine and Dentistry



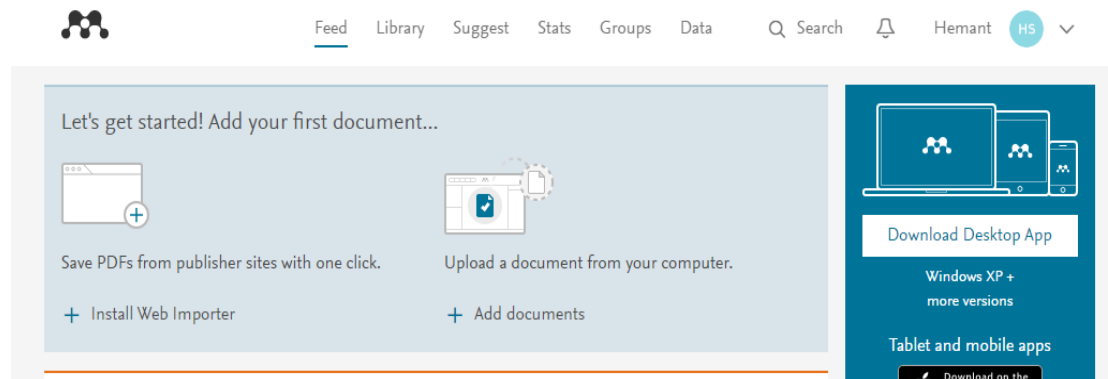
Researcher



By clicking [Create account](#), I agree to the [Privacy Policy](#) and [Terms & Conditions](#)

[Create account >](#)

After clicking on 'create account', a webpage similar to below opens confirming the creation of your Mendeley account. You will also receive an email confirming the same.



Step 2: Creating a personal profile

The next step is to create your personal profile. To do this, click on your name on the top right corner and then fill your details like: title, position, institution, add profile photo, add research interests, publications (will be covered later), research interests among others. Though, this step is not mandatory and you can always update it later.

Step 3: Downloading and installing Mendeley Desktop

Mendeley Desktop, Mendeley Web and Mendeley mobile app

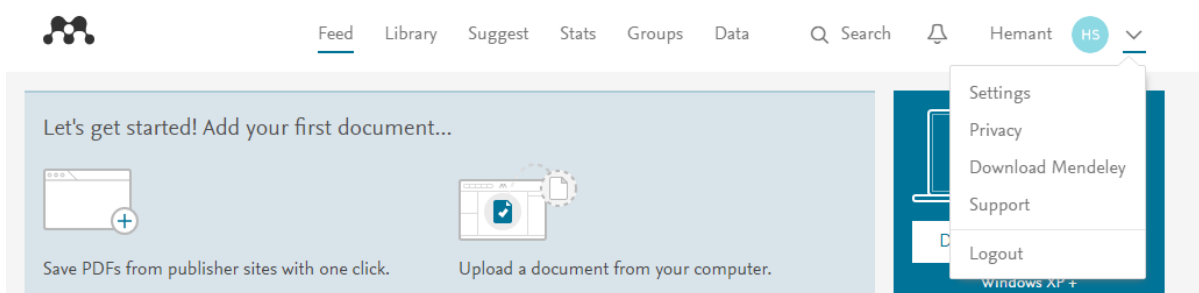
There are three ways in which you may access your references in Mendeley: Mendeley Desktop, Mendeley Web and Mendeley mobile app (android users can find it in app store).



Mendeley Desktop is the offline version of the software which is stored in the computer and provides the most comprehensive experience. One may perform all functions of Mendeley by using Mendeley Desktop (we advise this) and then sync it from time to time with the Mendeley Website.

Syncing is a core concept in Mendeley. Whenever you make changes in Mendeley, you'll need to sync in order to push those changes up into cloud storage. Syncing will also pull down any changes made on other devices. It's a good idea to sync regularly to ensure that your documents and annotations are saved in the cloud. You can sync at any time by using the sync button. Mendeley will also sync automatically each time you open it. For using certain functions of Mendeley Desktop you require internet access while some functions do not. We will discuss this later.

To download Mendeley Desktop, click on the downward arrow by the side of your name as shown below. You will find an option 'Download Mendeley': click it.



Once you click 'Download Mendeley', the following page appears. Here you will appreciate that Mendeley Desktop is available for various Operating systems like Windows, Mac and Linux. In this manual, we will stick to Mendeley Desktop for Windows.

Download Mendeley Desktop for Windows

Save time managing PDFs, instantly share thoughts on papers with colleagues and automatically back up and sync your files between different computers.



Latest version for Windows XP or later [See release notes](#)

Mendeley Desktop for other systems



[Mendeley Desktop for Mac OS X 10.6+](#)



[Mendeley Desktop for Linux](#)

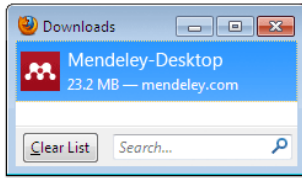


[Mendeley for iPhone, iPod Touch and iPad](#)
Opens in the iTunes App Store

Current Development Preview

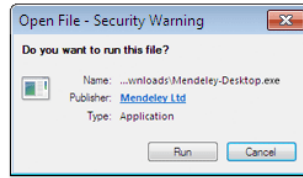
Click on 'Download Mendeley Desktop' marked in green as shown above, the following webpage will open (shown below) and the .exe file (Mendeley-Desktop-1.16.1-win32.exe) will be downloaded in the default download folder in your system. Please follow the instructions as shown below and run the .exe file to complete the installation of Mendeley Desktop.

1. Download Mendelely Desktop



Save Mendelely Desktop to your hard drive.

2. Install Mendelely Desktop



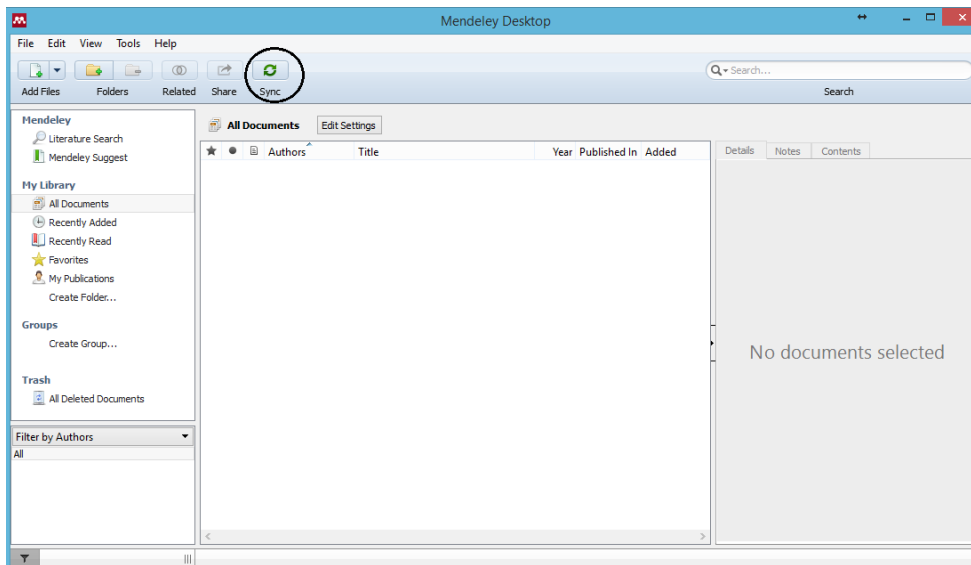
Double-click the Mendelely Desktop icon in your browser's download window, and follow the instructions on screen.

3. Open Mendelely Desktop



Need more help? See [Getting Started](#) or our [Support Portal](#).

Mendelely Desktop will again ask for your Mendelely account email id and password. Once entered, it suggests many options which are optional and you may skip them for the moment. Once through, your Mendelely Desktop will open, which will look as shown below.



Please do appreciate the 'sync' button in the Mendelely Desktop which is used to sync the content in Mendelely Desktop with Mendelely Web and vice versa. For this function, you require internet access.

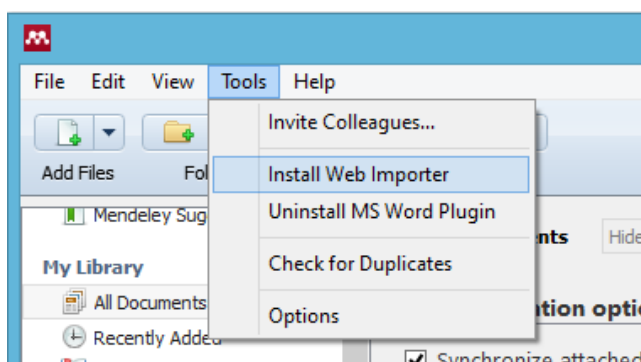


Step 4: Installation of web importer and MS word plugin

Before we begin using Mendeley Desktop, two important installations have to be completed: web importer and MS Word plug in. The former will help importing of references from web using commonly used web browsers directly to Mendeley and the latter links the Mendeley Desktop to MS word, where we can cite and insert bibliography.

Web importer

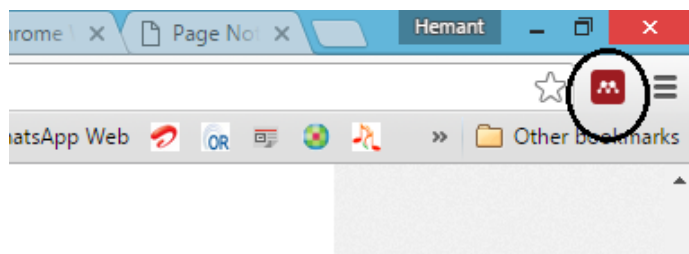
Open Mendeley Desktop and in the menu bar click on 'Tools' as shown below. You will find an option of 'Install Web importer'.



Once you click on 'Install Web importer', the following link <https://www.mendeley.com/import/> will open in your default web browser (say Chrome).

A screenshot of the Mendeley Web Importer website. The page has a navigation bar with 'Help Guides', 'Web importer', 'Contact support', and 'Feedback & support'. The main heading reads 'Save references to Mendeley from the web easily!' followed by the text 'With the Mendeley Web Importer, you can easily save references and PDF files into your personal library.' Below this is a composite image showing a ScienceDirect article page and a Mendeley Web Library window. To the right of the composite image, there are four browser icons with text instructions: a Chrome icon with 'Using Chrome?' and 'Install Mendeley Web Importer browser extension.'; a Firefox icon with 'Using Firefox?' and 'Download Mendeley Web Importer browser extension.'; and a Safari/Internet Explorer icon with 'Using Safari or Internet Explorer?'. The Chrome icon and its text are circled in black.

Here, you will have to install the web importer into your system by clicking on the link shown above. Once done, a red Mendeley Web Importer bookmark will appear by the side of the address bar in Google Chrome.



Another option is to have a 'web importer bookmarklet' in your bookmarks bar. Drag (with left click) the button 'Save to Mendeley' to the bookmarks bar. Before doing this, ensure that the bookmarks or favourites bar is visible in your web browser (you may need to switch this on from the 'view' menu in your browser or settings). You may select anyone of the two (for the course let us use the former method)

Using Chrome?
Install Mendeley Web Importer browser extension.

Using Firefox?
Download Mendeley Web Importer browser extension.

Using Safari or Internet Explorer?
Install the Mendeley Web Importer bookmarklet.

1. Make sure your 'Bookmarks' or 'Favourites' bar is visible. You may need to switch this on from the 'View' menu in your browser.
2. Drag this button to your 'Bookmarks' or 'Favourites' bar to add the bookmarklet to your browser.

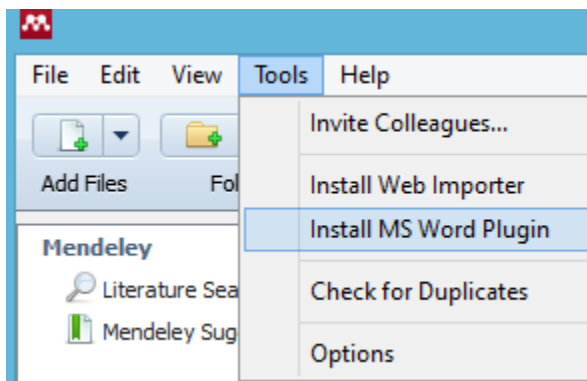
Save to Mendeley **DRAG & DROP**

Tips

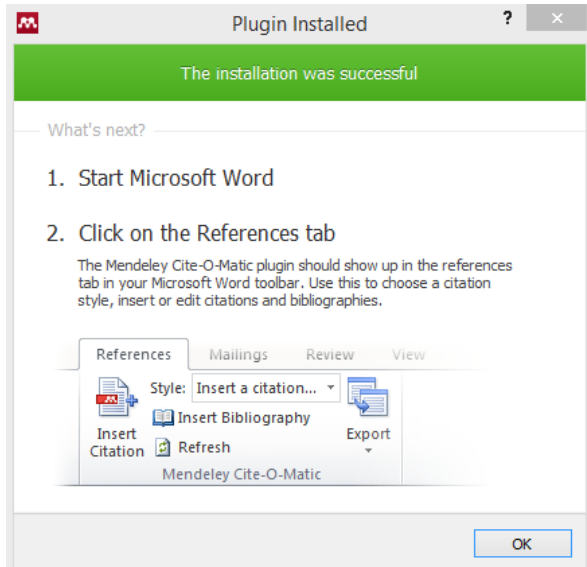
- We have noticed that there are challenges in installing the web importer into the new Microsoft Edge browser that comes along with Windows 10 installation. So, we suggest using one of the other browsers.
- Also, when you click on 'install web importer' from the Mendeley Desktop, the link opens up in the default browser of your computer. Sometimes, the default browser in your computer may not be your preferred browser. This creates challenges in installing the web importer into your preferred browser. So, we suggest as a first step to make your preferred browser the default browser (in settings) and then retry.
- It may be a good idea to update your browser to the latest version before installing the web importer.

MS Word plugin

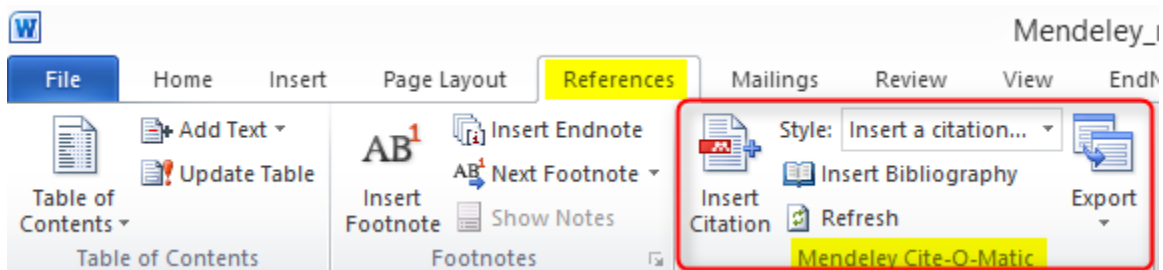
To install the MS work plugin, click on 'tools' in Mendeley Desktop where you will find the option 'install MS Word plugin'.



All MS applications (Outlook, word, excel, power point) should be closed before initiating this. After you click on the option 'install MS Word Plugin', a window will appear informing that the plugin has been installed. Click 'OK' in the window.



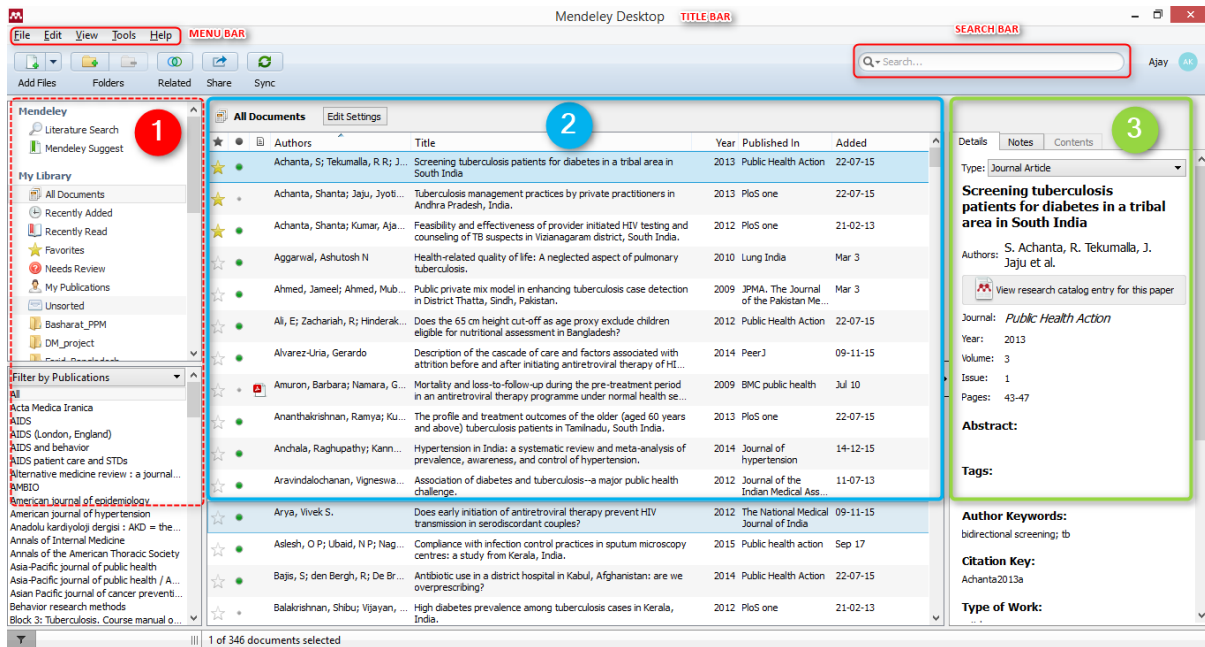
Once installed, the citation plugin will appear within your word processor under 'References' tab as shown below.



Anatomy of the software (Mendeley Desktop)

Mendeley Desktop can be accessed through a short cut on the Desktop or by pinning Mendeley Desktop to taskbar or having it in the start menu (this may require customization in your system). Let us have it in taskbar for this course.

When you first open Mendeley Desktop, you'll need to log into your Mendeley account. This ensures that any changes you make are being made to your own account and will be carried across when you log into different devices. Once logged in, you remain logged in even if you close the current session and open Mendeley Desktop unless you log out (option provided under 'file' in menu bar). Click Mendeley Desktop on your task bar. The anatomy of the Mendeley Desktop has been summarized below.



Notice the following things:

- **Title bar** on top followed by **Menu Bar** just below it and **Search Bar** on the right hand corner. Mendeley offers a powerful search tool to help you to locate items in your library. Just enter your search term in the field and Mendeley will filter your current view to show references which contain that term. *It will also search within the full text of PDF papers which appear in your library.* The search is context specific, so if you're not getting the results you expect make sure that you have the appropriate folder selected in the left-hand panel. If in doubt, select 'All Documents'. Use the 'clear' button which appears on the yellow toolbar to remove the search filter.
- Mendeley Desktop follows a three column structure – **the left-hand panel (1), the middle panel (2) and the right-hand panel (3).**
- The left-hand panel (1) gives the structure of the library and allows you to navigate through different filtering options for your library. When you click on different folders or groups listed in this column, different lists of papers will be returned in the main middle panel. In this screenshot we have 'All Documents' selected, which means the main panel is listing all of our references.
- The middle panel shows the list of references and allows you to select individual references. Clicking on a reference listed here will display this document's details in the right-hand panel.

You can also select multiple papers to undertake bulk actions, such as mass deletions or additions to folders.

- The right-hand panel shows the details of your selected reference. You can also use this panel to modify the details by clicking into the individual fields. You should carefully check and correct the details displayed in this panel as ensuring accuracy here will ensure that your citations are totally correct.
- Can you also notice the **SYNC button** just below the MENU BAR?

Do not worry if you do not understand these fully. We will reinforce these as we go along and it becomes clearer. The Mendeley Web also follows a similar three-panel structure (see below)

The screenshot displays the Mendeley Web interface. At the top, there is a navigation bar with tabs for 'Feed', 'Library', 'Suggest', 'Stats', 'Groups', and 'Data'. A search bar is located on the right side of the navigation bar. Below the navigation bar, the main content area is divided into three panels. The left panel, titled 'MY LIBRARY', contains a sidebar with options like 'All Documents', 'Favorites', 'My Publications', and 'Recently Read'. The middle panel shows a list of references with columns for checkboxes, stars, titles, authors, and dates. The right panel, titled 'Details', shows the full details of the selected reference, including the title, authors, journal name, volume, and DOI. The selected reference is: "They Know, They Agree, but They Don't Do"- The Paradox of Tuberculosis Case Notification by Private Practitioners in Alappuzha District, Kerala, India. The authors are Philip S. Isaakidis P, Sagili K, Meharunnisa A, Minthyunjan S, Kumar A. The journal is PloS one, 2015, vol: 10 (4) pp: e0123286. The DOI is 10.1371/journal.pone.0123286 and the ISSN is 1932-6203.

Section 3: Creating a Mendeley library


There are various ways of creating a library in Mendeley Desktop. This library includes the bibliography and relevant attachments, if any. One may use the Web Importer feature to import from online databases. Other options are by importing BibTeX, RIS and other bibliographic file formats. One may also import PDF documents directly or may add a folder containing the pdfs directly into Mendeley (remember not all PDFs get imported perfectly as bibliography and will need editing in Mendeley, we will discuss this later). There is also option for manual entry of bibliography for citing books, reports, webpages, blogs, scientific articles that are not available online or whose bibliographic details are not correctly imported into Mendeley. Once a library is created, you may export bibliography to other formats.

OPTION 1: Importing from databases- PubMed, ScienceDirect, Google Scholar

Task: Import the publication(s) of author Shewade HD, published in the year 2014 from PubMed. (PubMed search – **Shewade HD[Au] AND 2014[PDAT]**; Note that this is not case-sensitive)

With the Mendeley Web Importer extension, you will be able to easily save references and PDF files into your personal library with a single click. To use the new Mendeley Web Importer for Chrome, you just need to be viewing an article or a list of references in the browser. This can mean that you're looking at an actual PDF file, an article entry in an online catalogue, or even a list of search results. The Mendeley Web Importer extension will scan the page for metadata, and provide you with a list of the results it finds. Remember: Before trying to import, you should be logged in to your Mendeley Web account. Otherwise, you will be forced to sign in at some point.

Open <http://www.ncbi.nlm.nih.gov/pubmed> and search for the above mentioned article (Type Shewade HD[Au] AND 2014[PDAT] in the search bar and press ENTER key). The result will be as follows:


 PubMed
 Create RSS Create alert Advanced

Format: Abstract ▾

Public Health Action, 2014 Dec 21;4(4):281. doi: 10.5588/pha.14.0094.

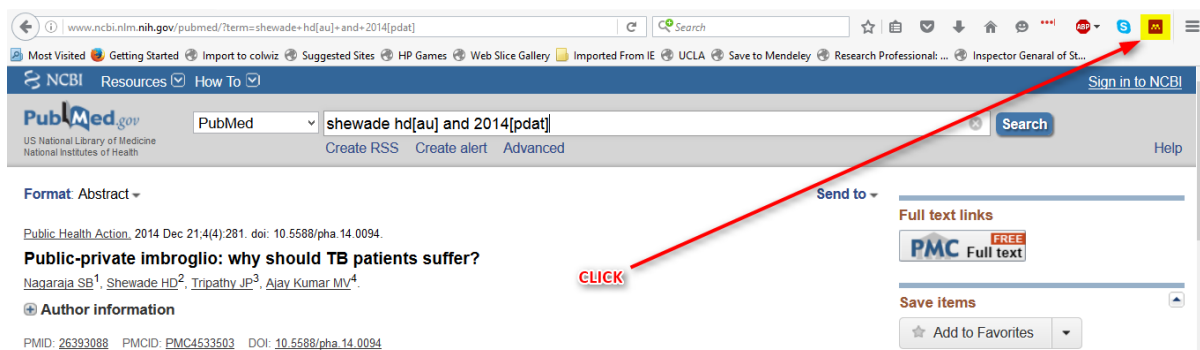
Public-private imbroglia: why should TB patients suffer?

Nagaraja SB¹, Shewade HD², Tripathy JP³, Aiyar Kumar MV⁴.

Author information

PMID: [26393088](#) PMCID: [PMC4533503](#) DOI: [10.5588/pha.14.0094](#)

Then identify the web importer tab in the bookmarks by the side of the address bar and click on it as follows:



www.ncbi.nlm.nih.gov/pubmed/?term=shewade+hd[au]+and+2014[pdat]

NCBI Resources How To Sign in to NCBI

PubMed Search

Format: Abstract ▾

Public Health Action, 2014 Dec 21;4(4):281. doi: 10.5588/pha.14.0094.

Public-private imbroglia: why should TB patients suffer?


Nagaraja SB¹, Shewade HD², Tripathy JP³, Aiyar Kumar MV⁴.

Author information

PMID: [26393088](#) PMCID: [PMC4533503](#) DOI: [10.5588/pha.14.0094](#)

Send to ▾

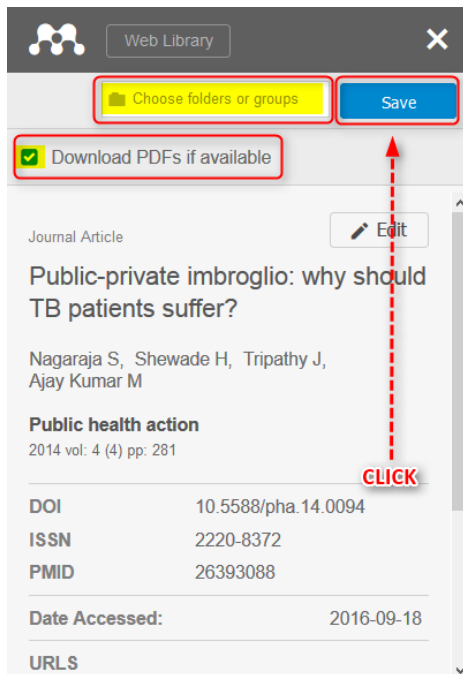
Full text links



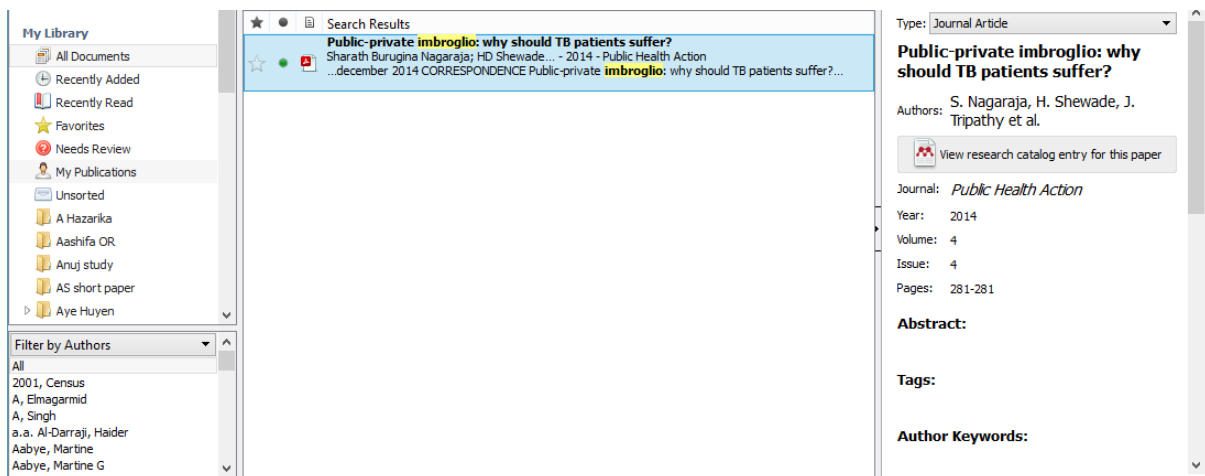
Save items

Add to Favorites ▾

After you click on the web importer, a dialogue box opens as shown below. Before saving the reference in Mendeley, you have various options: like editing the bibliographic details, selecting the folder where you want the reference to be stored in Mendeley (in case you have created folders) and downloading the pdf(s) of the article along with the bibliographic details, if available. For now, just click 'Save' and the reference will get imported to your Mendeley Web account that you have logged into.



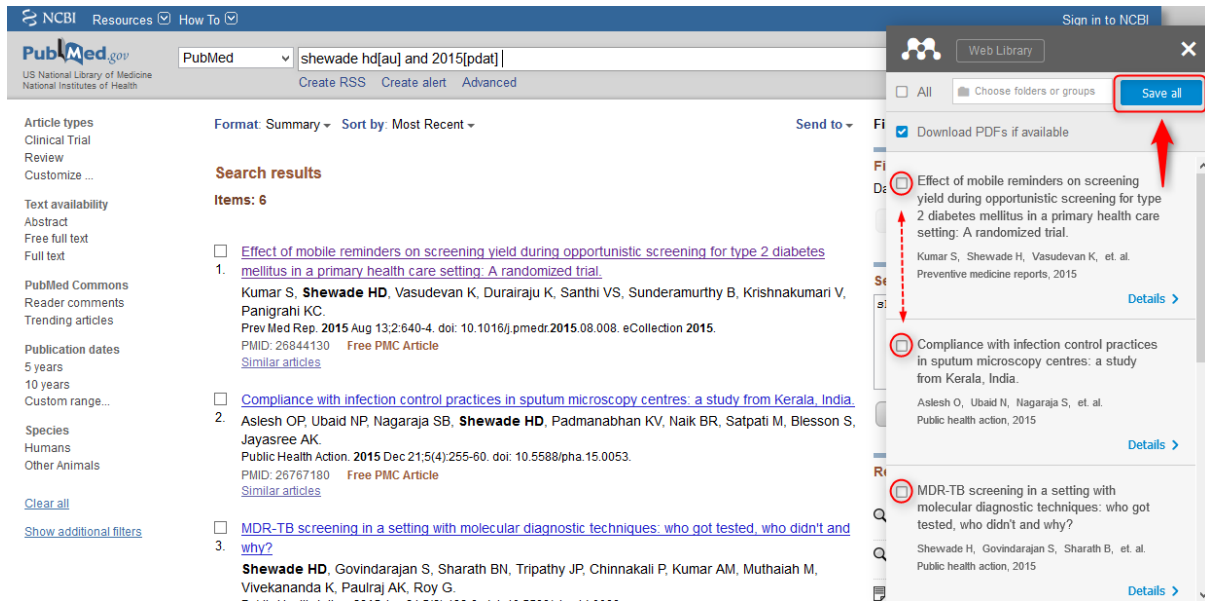
Please note that the reference is only in your web account now. For bringing it to the Mendeley Desktop, open the application and click on the 'sync' button. The bibliography will be found in 'All documents' (in addition, it will also be available in the specific folder, if specific instructions were given before).



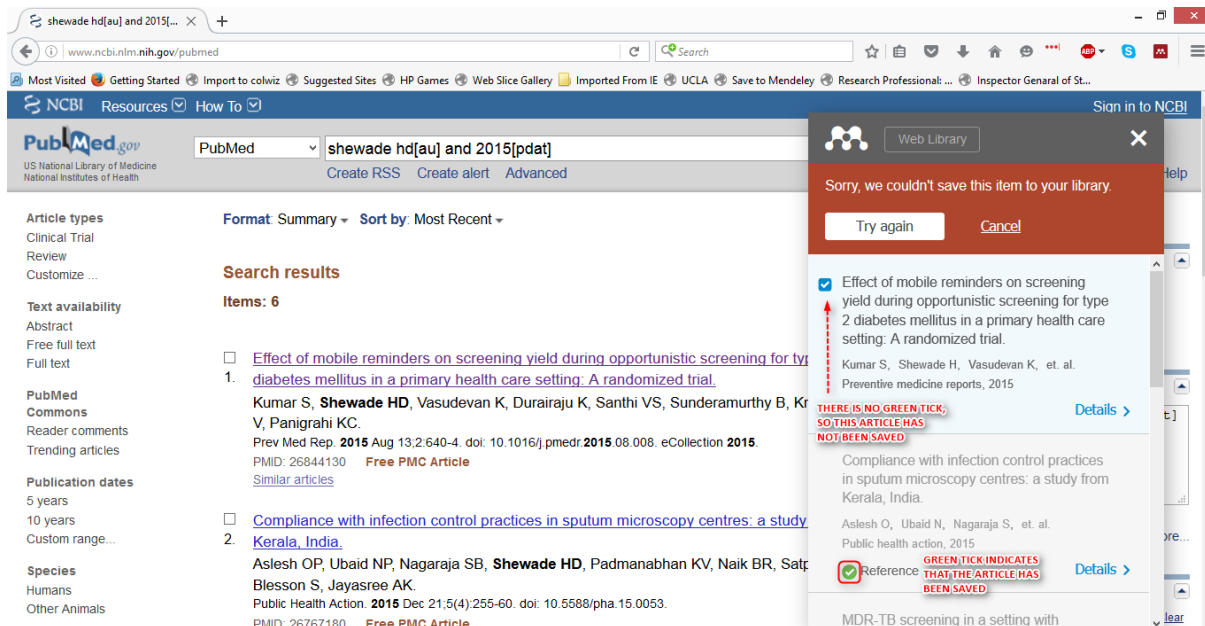
Similarly multiple references can be imported from PubMed using the Web Importer.

Task: Import the publication(s) of author Shewade HD, published in the year 2015 from PubMed.
(PubMed search – Shewade HD[Au] AND 2015[PDAT])

In this PubMed search, you will get six publications. Click on the Mendeley Web Importer as mentioned before, then a dialogue box will open. If you want to save all six articles and then click on 'Save all'. Alternatively, if you want save only selected articles, you may want to click on individual articles before pressing the 'Save' button. Then, click on 'sync' in Mendeley Desktop' and all six references will appear under 'All documents' in Mendeley Desktop.



Sometimes, there may be errors in importing some of the references, like this one below.



If you notice carefully, there has been an error and one article could not be saved. In such cases, try opening that particular article and try again.

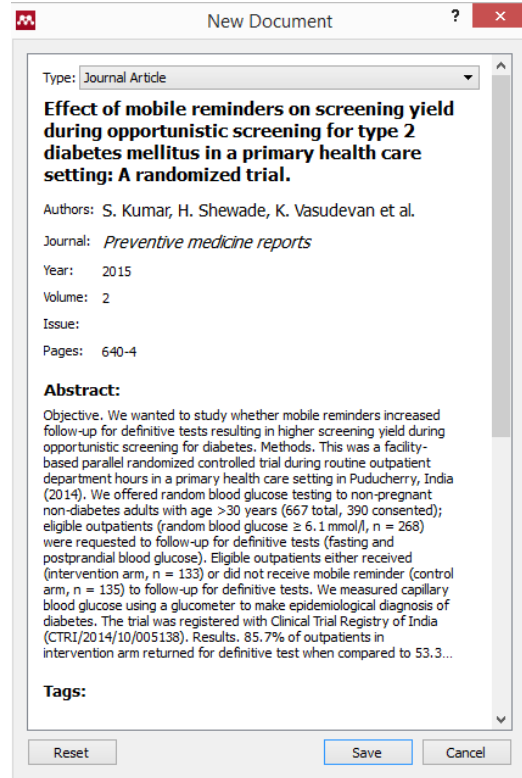
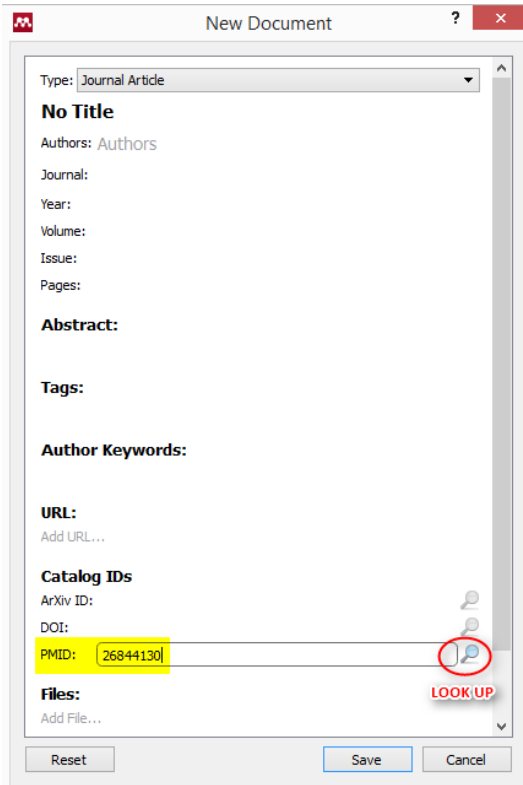
The screenshot shows a PubMed article page for the study 'Effect of mobile reminders on screening yield during opportunistic screening for type 2 diabetes mellitus in a primary health care setting: A randomized trial'. The article details the objective, methods, results, and conclusion. A Mendeley Web Library popup is overlaid on the right side, displaying an error message: 'Sorry, we couldn't save this item to your library.' with 'Try again' and 'Cancel' buttons. At the bottom of the article page, the PMID number 26844130 is highlighted in a yellow box.

If this approach also does not work, then we may try to use the 'LOOKUP' function and search for this article from within Mendeley Desktop using the PMID number. If you notice in the bottom left corner of the screenshot above, you will note that the PMID number of this article is 26844130. Take note of it.

Open the Mendeley Desktop now and click on File → Add Entry Manually

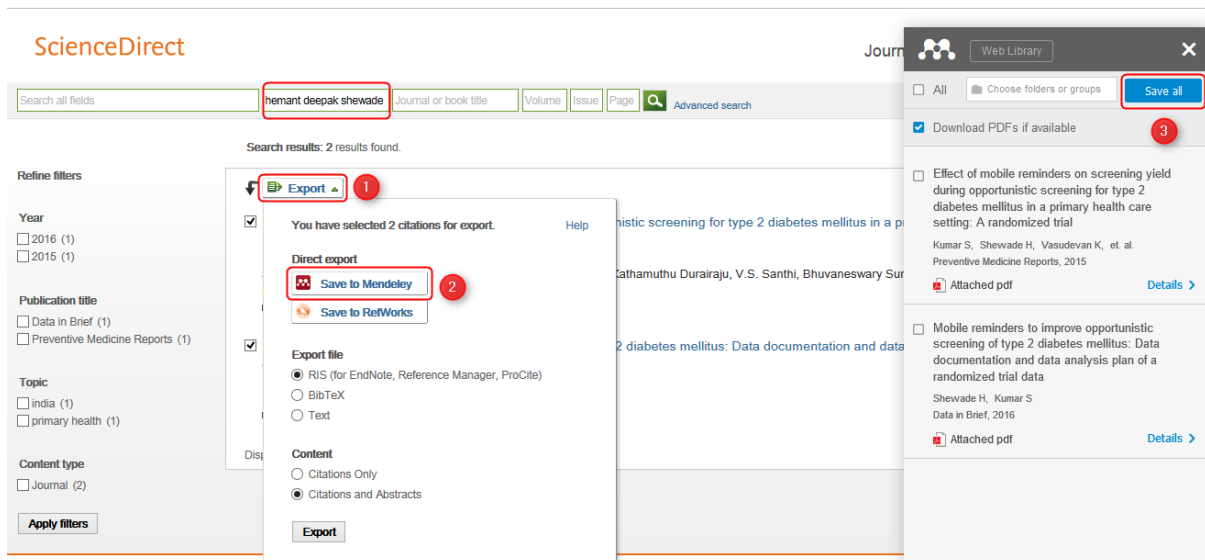
The screenshot shows the 'File' menu in Mendeley Desktop. The menu items are: Add Files... (Ctrl+O), Add Folder... (Ctrl+Shift+O), Watch Folder..., Add Entry Manually... (highlighted), Import..., Export... (Ctrl+E), Send by E-mail..., and Merge Documents.

A new popup opens. Enter the PMID number in the appropriate field and click on the magnifying glass next to it. This will look up for the reference in PubMed and retrieve it. After that, you click on 'save' and store it in your library.



Similarly one may import publications from ScienceDirect as well. Point to note is that in ScienceDirect, in addition to using the Web Importer, there is an additional option to import to Mendeley within ScienceDirect itself.

Task: Import all publications of Author: Hemant Deepak Shewade from Scencedirect into Mendeley Desktop. See the screenshot below and follow the steps 1-3.



Similarly Web Importer can be used to import publications from Google Scholar. Web importer works very well when the bibliographic information (metadata) is stored in a structured format say PubMed or ScienceDirect or Google Scholar. However, it is a good practice to check the bibliographic information by clicking the imported article and checking the information on the right in Mendeley Desktop.

Note: The web importer does not work for other web pages, say online documents in the form of PDF, other webpages in general, blogs and so on.

OPTION 2: Importing BibTex, RIS and other file formats

Task: Export all PubMed search results for the search term “Shewade HD[Au]” as a BibTex file and then import it to Mendeley Desktop.

Open <http://www.ncbi.nlm.nih.gov/pubmed> and do the PubMed search for the above search tem. Then, click on ‘Send to’ on the top right corner, followed by ‘citation manager’. After altering ‘Number to send’, click on ‘Create File’.

The screenshot shows the PubMed search interface. The search term is "Shewade HD[Au]". The search results are displayed in a list format. A "Send to" dialog box is open, showing options for where to send the results. The "Citation manager" option is selected. The "Number to send" is set to 20. The "Create File" button is highlighted. Annotations include circles around the "Send to" dropdown, the "Citation manager" radio button, the "Number to send" dropdown, and the "Create File" button. Text boxes explain the "Number to send" field and the "Create File" button.

Format: Summary Sort by: Publication Date

Search results

Items: 18

1. [Cost of hospitalisation for non-communicable diseases in India: are](#)
Tripathy JP, Prasad BM, **Shewade HD**, Kumar AM, Zachariah R, Chac
Trop Med Int Health. 2016 Aug;21(8):1019-1028. doi: 10.1111/tmi.12732. Epub 201
PMID: 27253634
[Similar articles](#)

2. [Utilization of the state led public private partnership program "Chirar](#)
[facility births in Gujarat, India: a cross sectional community based st](#)
Yasobant S, Vora KS, **Shewade HD**, Annerstedt KS, Isaakidis P, Mava
Costa A.
BMC Health Serv Res. 2016 Jul 15;16:266. doi: 10.1186/s12913-016-1510-7.
PMID: 27421254 [Free PMC Article](#)
[Similar articles](#)

Send to Filters: [Manage Filters](#)

Choose Destination

File Clipboard

Collections E-mail

Order My Bibliography

Citation manager

Generate a file for use with external citation management software.

Number to send 20 MAY CHANGE THIS DEPENDING ON NUMBER OF ITEMS

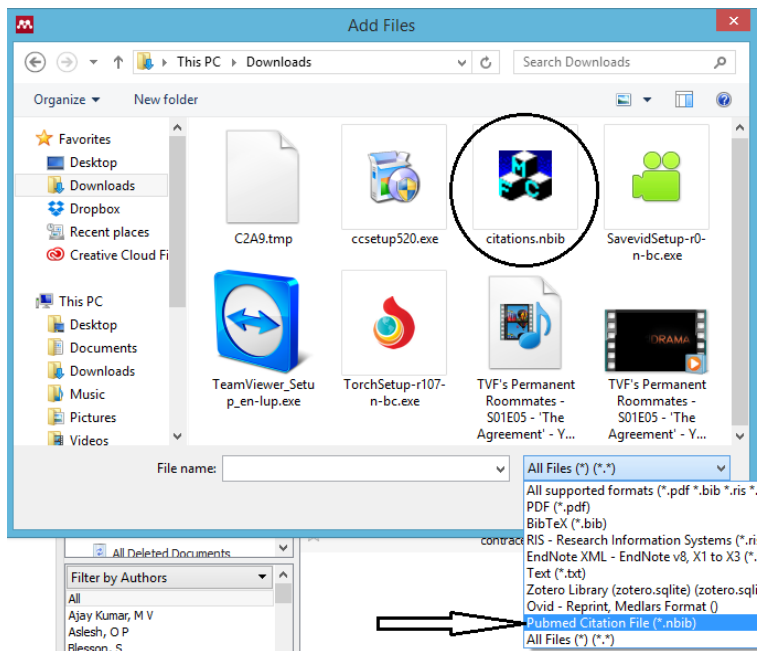
Start from citation 1

Create File CLICK

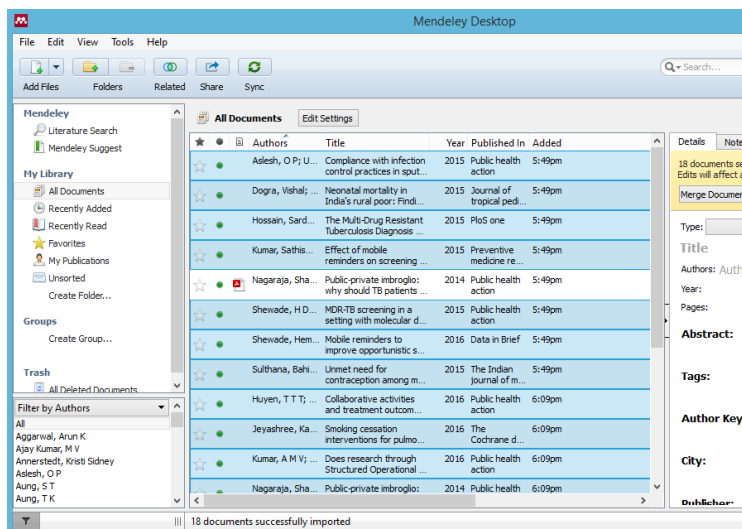
Recent Activity

Your will be prompted to save the ‘citations.nbib’ file also known as PubMed citation file.

Let us save it in the Downloads folder.



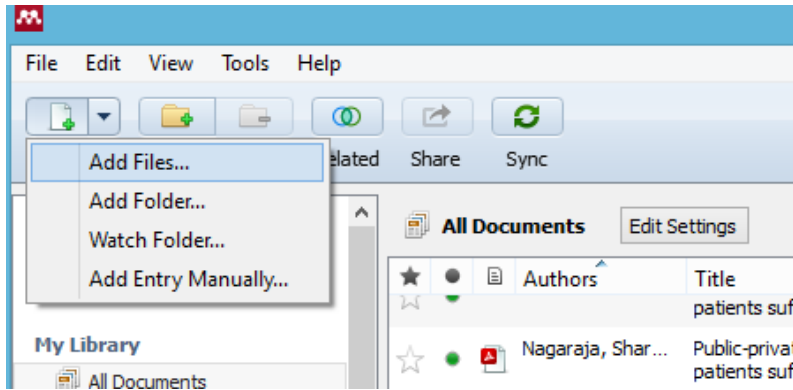
Once you import the citations.nbib file, the publications will be visible in your library under 'All documents'.



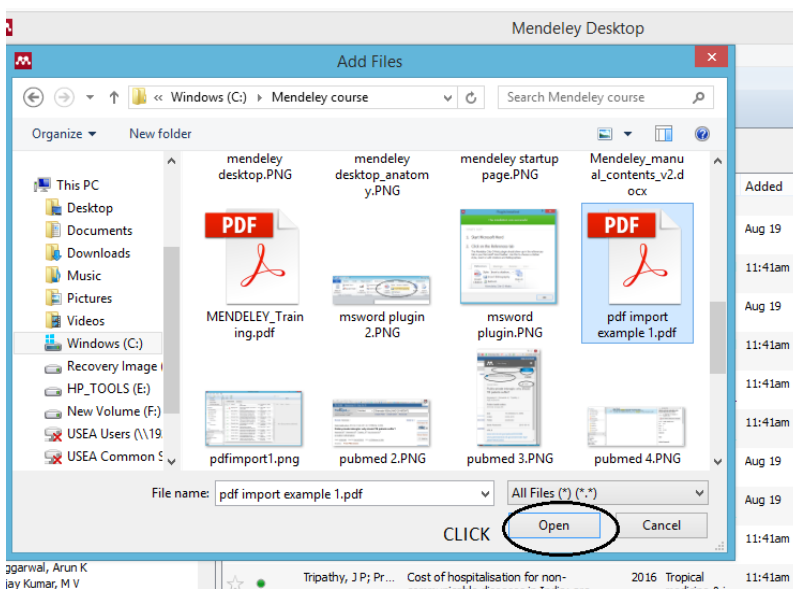
OPTION 3: Importing article pdfs

Task: Import the pdf titled 'pdf import example 1.pdf' from the 'Mendeley course' folder into Mendeley Desktop.

Click on the downward arrow by the side of 'add files' on top left corner of Mendeley Desktop. Select the option of 'add files'.

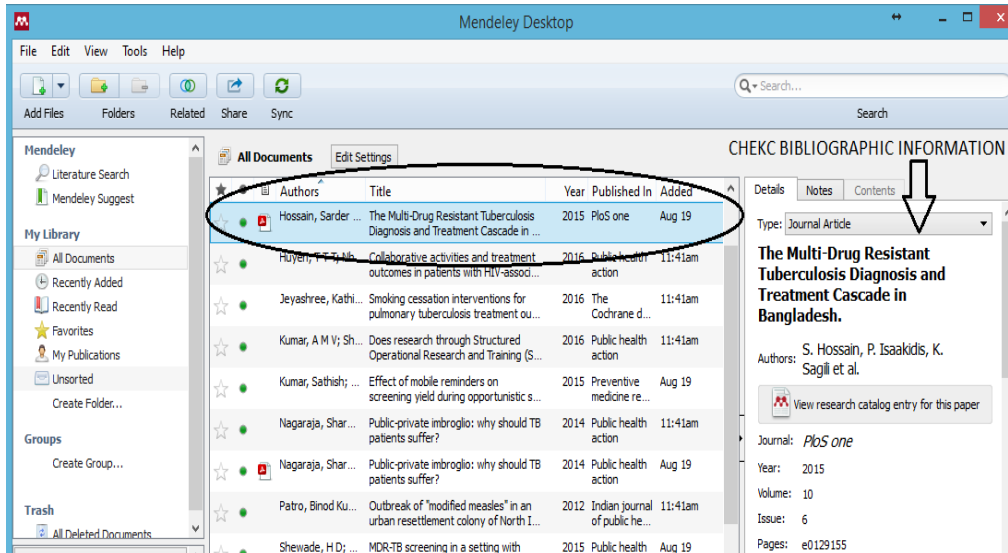


Browse for the pdf 'import example 1.pdf' in 'Mendeley course' folder in root of C Drive.



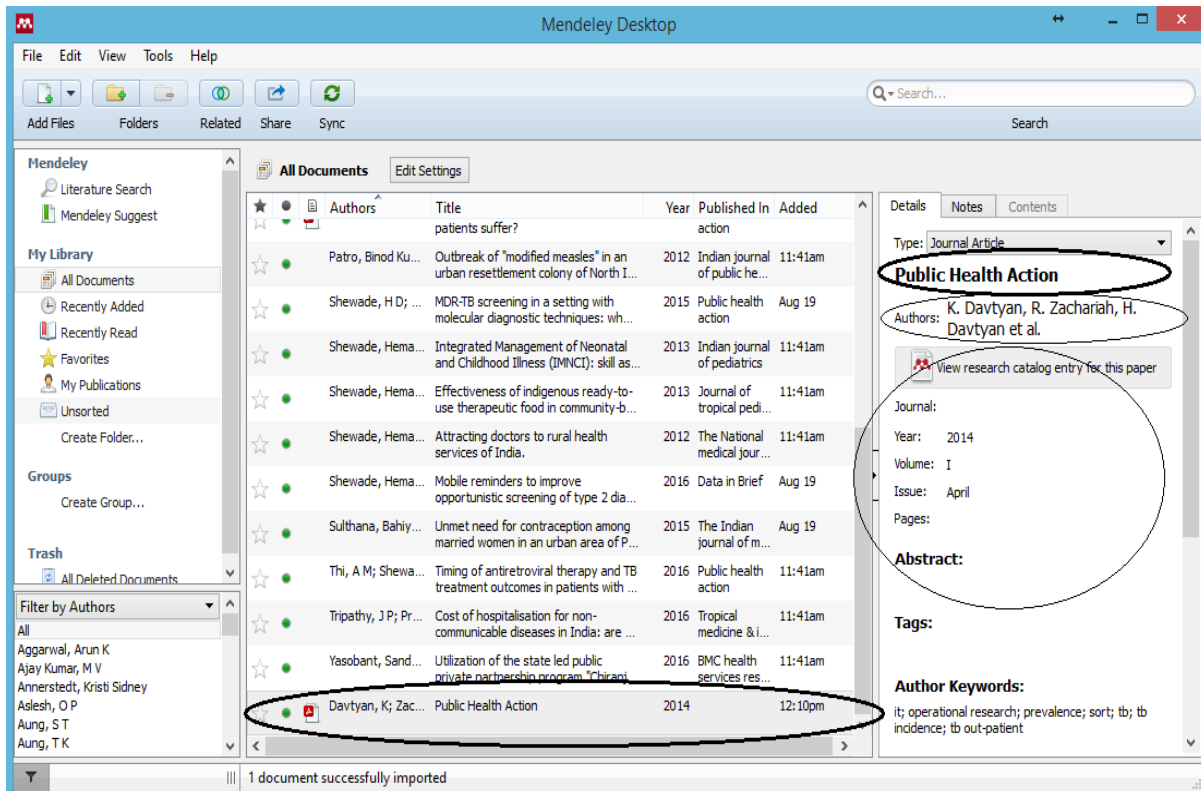
Once the pdf is imported in Mendeley Desktop, check for the completeness of Bibliographic information. What do you find?

The bibliographic information has been correctly imported into Mendeley Desktop!

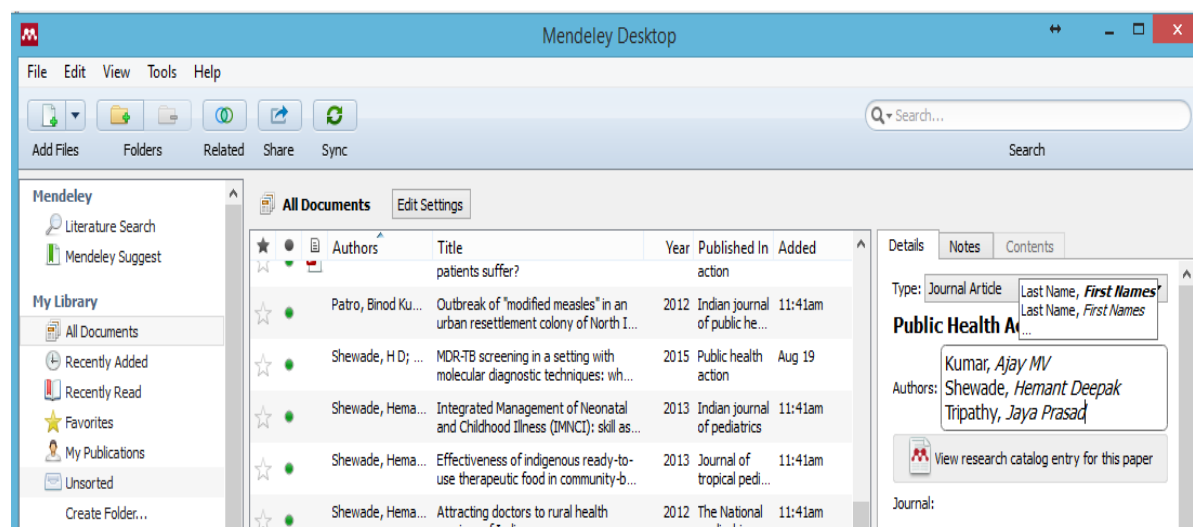


Task: Import the pdf titled 'pdf import example 2.pdf' form the 'Mendeley course' folder into Mendeley Desktop.

What do you find? Has the bibliographic information been correctly imported? You will find that the bibliographic information has not been correctly imported as shown below.



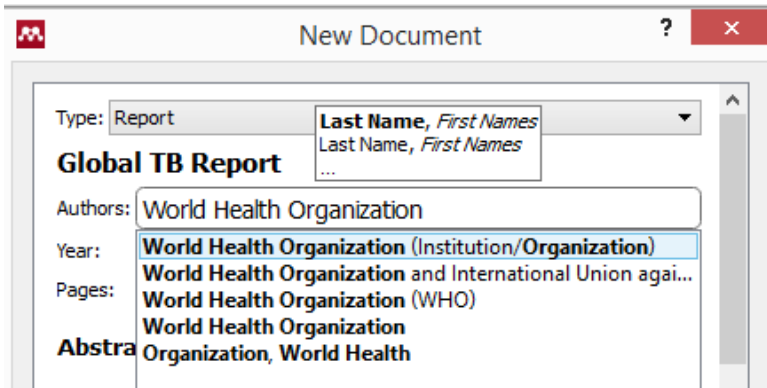
You have the option of manually correcting the title, author list, journal and other bibliographic information. One important point to note here is that while adding the author names you have to be careful as there is a specific way of mentioning author names.



Please note the following tips:

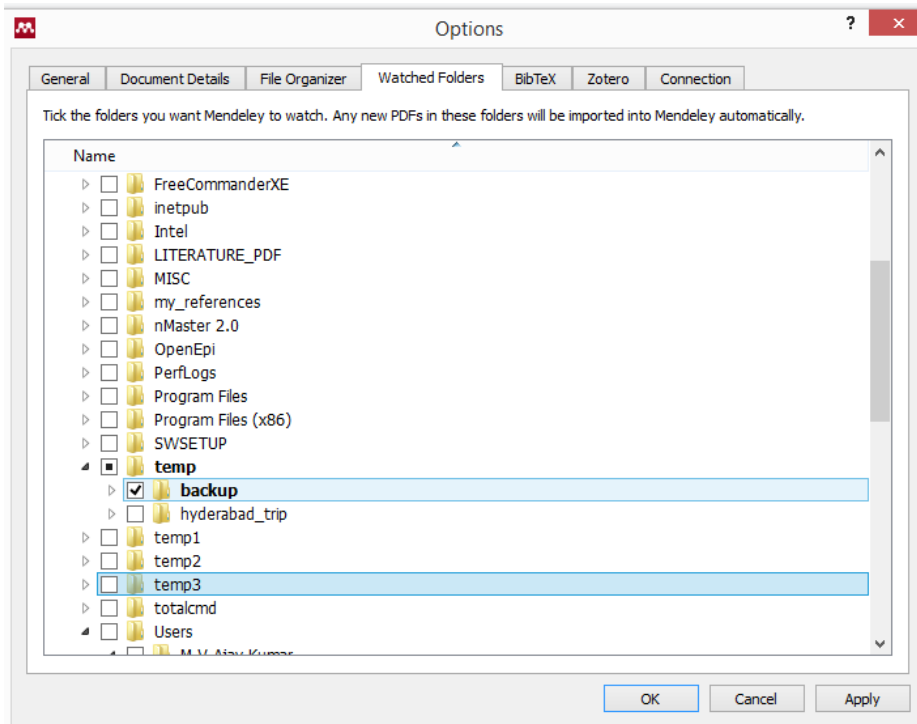
- Mention one author in one line.
- First type the family / last name of the author, then, type a comma, then a space followed by first and middle name. Press 'ENTER' key to type the next author name.
- If you have entered the author name in the format prescribed above the family/last name will be in non-italic font and the first and middle name will be in italic font.
- If you do not follow the above format and just type the full name, the last word of the author name will be considered by default as last name and all other words will be considered the first name.

Sometimes, you may want to type the full name of the organization in the author field (like World Health Organization). If you type it normally, 'Organization' will be considered as last name and will be cited as 'Organization WH' which is not how we want. To get this in the right format, please select that this is the name of the institution/organization from the drop down (as shown below).



Instead of a single PDF file, it is possible to add an entire folder containing multiple PDF documents in a single short. Use 'Add Folder' option from File in the Menu bar.

In addition, you may create a 'Watch Folder' which means designating one of the folders in your computer as 'Watch Folder'. Mendeley keeps a watch of this folder and any PDF files added to this folder will be imported automatically to the Mendeley library. (Go to Tools → Options → Watched Folders → Tick the folder you want to designate (in this example, we have ticked the folder 'backup' under 'temp') as watch folder and click 'Apply')



Note:

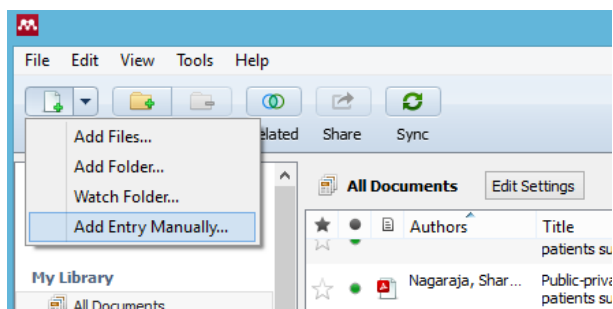
As already mentioned, PDF import is often imperfect. Hence, it is a good practice to check the bibliographic information and make necessary corrections if required.

OPTION 4: Manual entry of citations-journal article, book, report, webpage

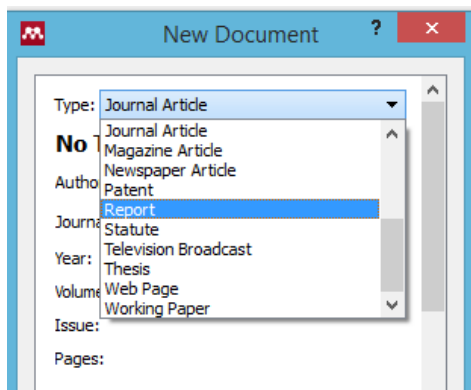
Manual entry of bibliography is another option. This can be done for all types of bibliography: journal article, book, report, webpage, blog etc. However, for journal articles, more efficient and simple ways are available as described before. A point to note is that where journal article is available offline only (print), or the web importer function or PDF importing is not working properly, then manual entry or editing is an option. Manual entry is usually the only option to add reports to your library (either available as a webpage or PDF online or as a hard copy with you), guidelines or any other documents, the reason being web importer or pdf importer are not useful options here.

Task: Add the WHO World TB report 2015 'global TBR 2015.pdf' bibliography to Mendeley Desktop. The online link for the same is <https://goo.gl/ZYBGzP>.

First, open Mendeley Desktop, click on downward arrow to the side of 'add file' on top left corner and select the option 'Add entry manually'.



A dialogue box will open in which choose the appropriate bibliography type (report). This is important as the structure of bibliography depends on the type of bibliography and information that you feed into is also different.

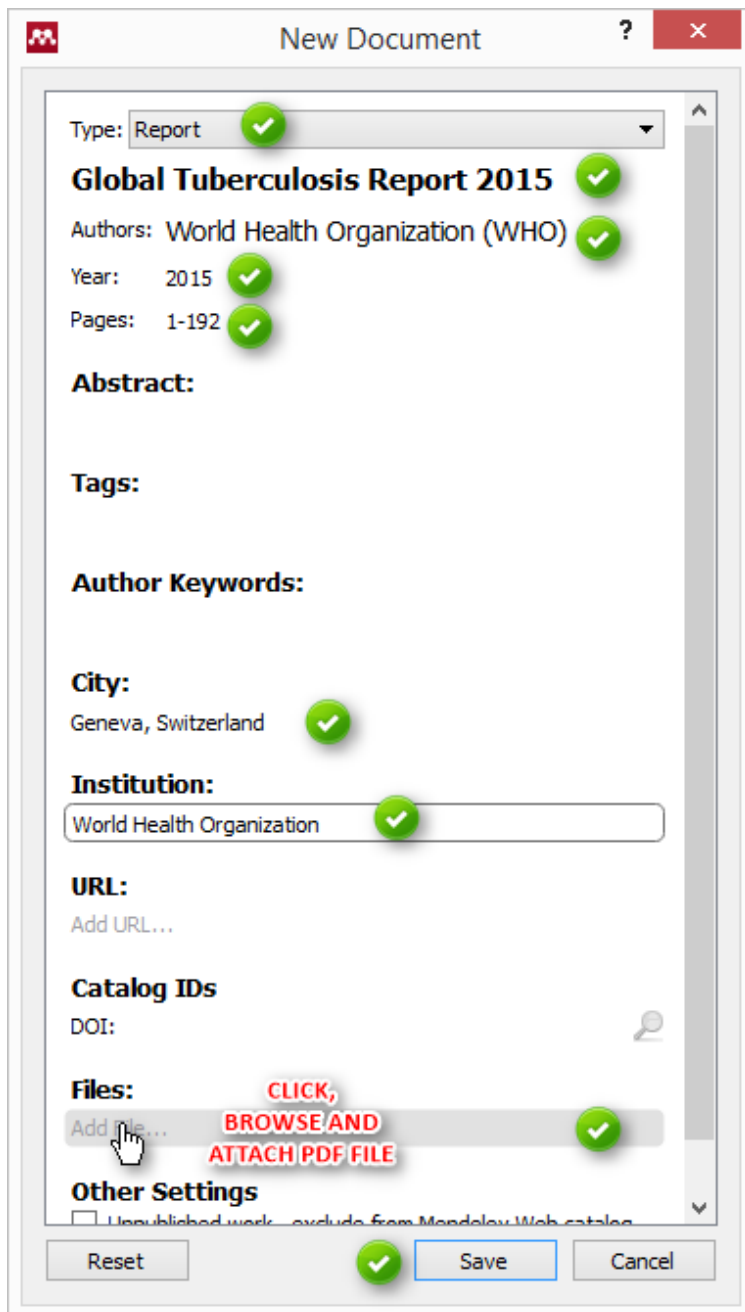


Then add the title of the report from the pdf provided 'Global TBR 2015.pdf' in your Mendeley folder. Here, under author, mention the name of the organization as there is no specific author mentioned in these types of reports. Type the same as follows, i.e., name of the organization followed by a comma.

World Health Organization (WHO),

This is important as this way the name of the organization publishing the report will appear first in the bibliography when you cite it and this is the standard way generally accepted by most of the journals. If you do not add a comma, the software will by default take the last word as last / family name and the reminder as first and middle name. If this approach does not work for some reason (as has been observed), then use the approach mentioned above of indicating clearly that the name typed is not the name of an author but of an institution/organization.

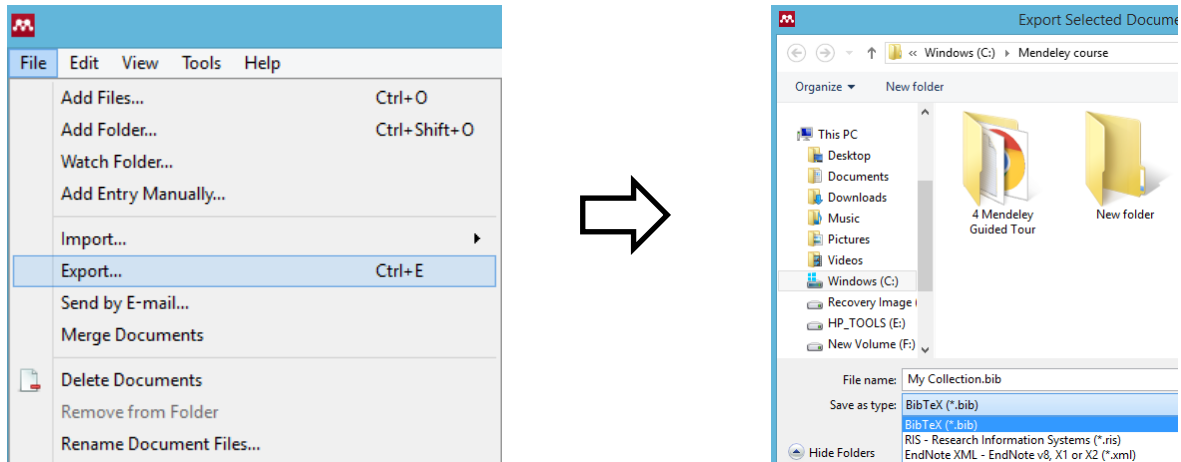
Fill in other details like year, number of page, city, institution, etc. and you also have the option to attach the pdf of the report as well. (Look at the screenshot below)



If the bibliography type is a webpage, it is always a good practice to save a copy of the webpage (in PDF format) and archive it in Mendeley library. The reason being, many a time, the URLs may change and what was functional while preparing the manuscript, might become non-functional after submission of the manuscript to a journal and the reviewers might come back to you with that specific question.

Exporting bibliography

Exporting bibliography to other formats (so that they may be read by other reference manager software) is possible using Mendeley. It is very simple, after selecting the files you want to export (single or more than one at a time), click on 'file' and then click on 'export'. You have the option of saving the file in three formats: BibTeX (.bib) or Research Information Systems (.ris) or endnote (.xml).



Section 4: Managing your library and folder management

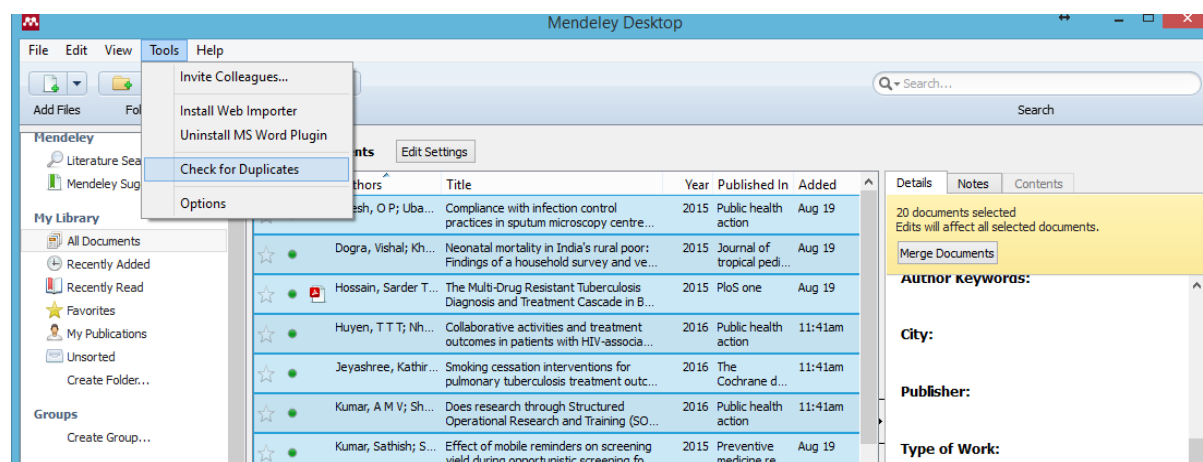
Mendeley Desktop's interface should be fairly intuitive if you're familiar with programs like iTunes, or even Gmail. The left-hand panel offers a number of different options to help filter your document list to exactly what you need to find.

The default position when opening Mendeley Desktop is 'All Documents,' which will list all items in your library. You can use the column headings in the middle panel (such as Author Names, Year, etc.) to sort your documents by that value - this can be useful for finding works by a specific author, for example. You can also use the left-hand panel to access items you've recently added, or items you've recently read.

1. Merging duplicate citations

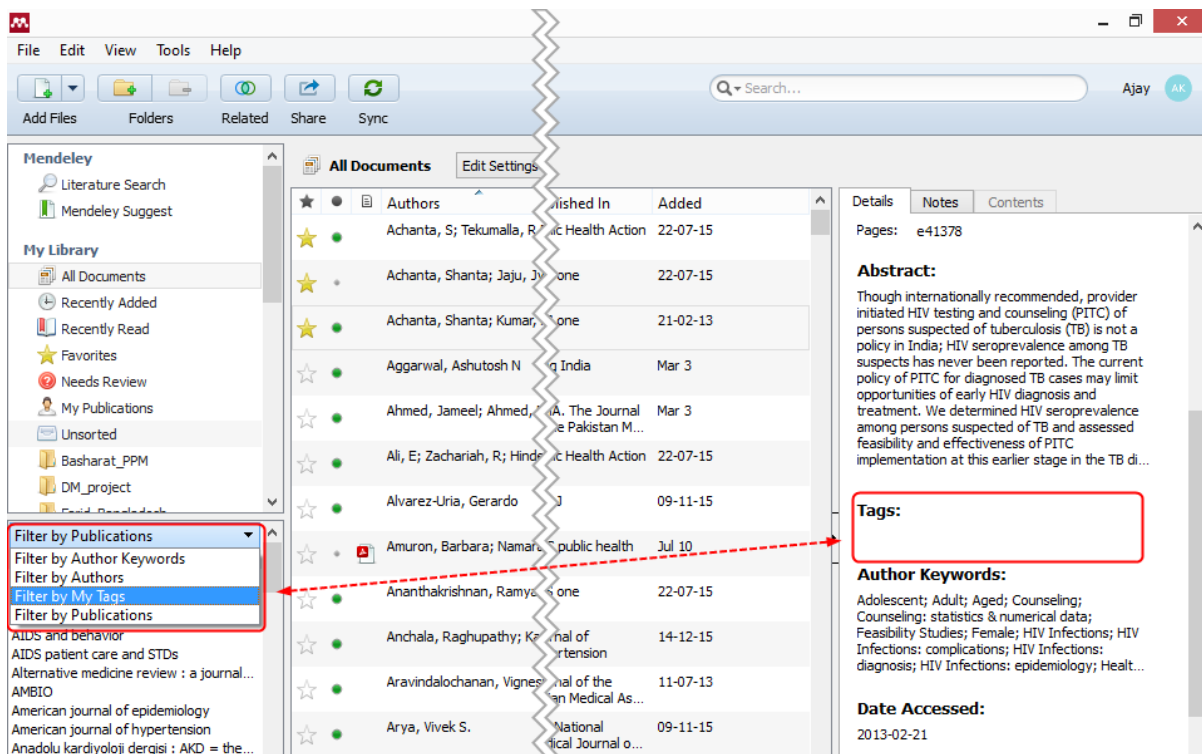
Task: In your Mendeley library developed till now, identify duplicate articles and merge them.

First in your Mendeley Desktop, make sure you are in 'All documents' by clicking on it in the left hand panel. Then go to 'Tools' in the menu bar, click 'Check for Duplicates'. The software will identify duplicates and suggest merging them. If the references are similar but not exactly a duplicate of each other, the Mendeley will give you the option to keep one of them and discard the other.



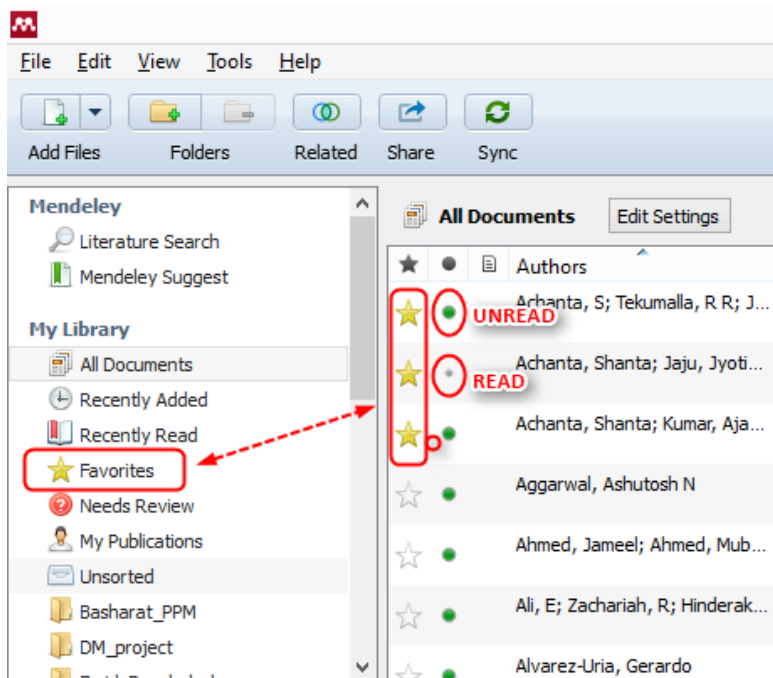
2. Using filters, tags

You have the option of tagging the bibliography as shown below and then you can apply filters to bibliography not only using these tags but also using author, publication and author key words.



3. Marking documents as read/unread

When you add materials to your library, they will initially be marked as unread - indicated by a large green dot in the second column. Alternatively, a document will be marked as read (indicated by a small grey dot) once you've spent a certain amount of time reading it in the Mendeley PDF reader. You can toggle this off and on by clicking it.

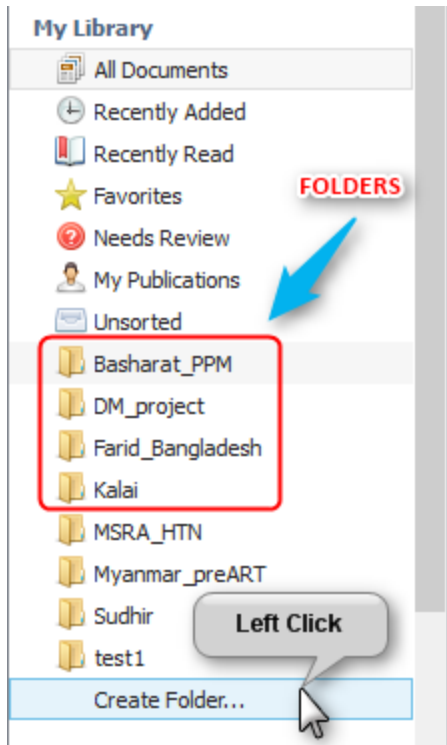


4. Marking your favourite documents

As shown above, a reference can be marked as favourite by clicking on the star. All such references will be included under 'Favourites' folder in the left-hand panel from where it is easily accessible.

5. Organizing files

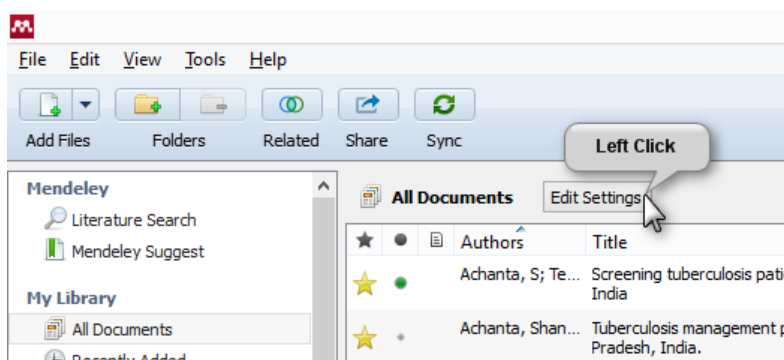
All references are by default, stored in the 'All documents'. One may also consider organizing references in specific folders by first creating folders as shown below and then dragging (left click and drag) the related references to the respective folders. However, as mentioned before, a copy always remains in 'All documents'.

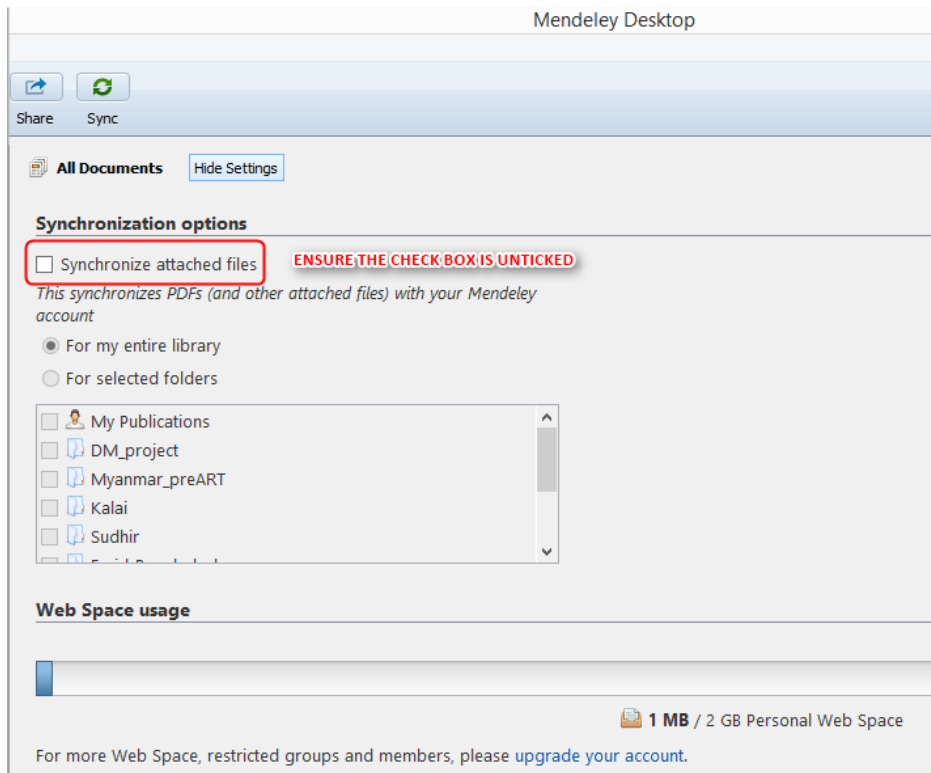


6. How to ensure that you do not sync the attached PDF documents to the web account?

One important thing to remember is that the free version of Mendeley provides a space of 2 GB only on web account. So, it is important to use this space rationally, otherwise we run the risk of exceeding the free limit sooner than later. One easy tip is to ensure that PDF documents are not synchronized with the web account. This way, you will have access to your PDF documents in the Mendeley Desktop, but do not necessarily eat up the limited web space.

To do this, click on 'edit settings' as shown below and unmark the option 'Synchronise attached files'. Notice that there are options to perform this function for your entire library or only for selected folders. Also, take note of the web space usage.





Please note that once your Mendeley Desktop is ready, you can use it to cite references and create bibliography in the manuscript you are working upon. Using Mendeley desktop for this function does not require internet access.

If the bibliography is attached to a pdf, one may read the PDF by clicking on the PDF icon. The PDF documents opens in a separate tab within the software. One can use Mendeley as a PDF reader as well: marking text, taking notes etc. (See below)

Mendeley Desktop

File Edit View Go Tools Help

Select Pan Note Highlight Color Zoom Fullscreen Share Sync

My Library Mortality and loss-to-f...

OPEN ACCESS Freely available online PLOS ONE

Can Follow-Up Examination of Tuberculosis Patients Be Simplified? A Study in Chhattisgarh, India

Debashish Kundu^{1*}, Ajay M. V. Kumar², Srinath Satyanarayana², Puneet Kumar Dewan¹, Sreenivas Achuthan Nair¹, Kshitij Khaparde¹, Priyakanta Nayak¹, Rafael Van den Bergh³, Marcel Manzi³, Donald A. Enarson², Madhav Rao Deshpande⁴, Sachin Chandraker⁵

1 Office of the World Health Organization (WHO) Representative in India, WHO Country Office, New Delhi, India, **2** International Union against Tuberculosis and Lung Diseases (The Union), South East Asia Office, New Delhi, India and Paris, France, **3** Médecins Sans Frontières, Operational Centre Brussels (OCB), Luxembourg, Luxembourg, **4** Directorate of Health Services, Raipur, Chhattisgarh, India, **5** Intermediate Reference Laboratory, Raipur, Chhattisgarh, India

Abstract

Background: Each follow-up during the course of tuberculosis treatment currently requires a sputum sample. However, the incremental yield of the second sputum sample during follow-up of different patients has never been determined precisely.

Objectives: To assess the incremental yield of the second sputum sample in the follow-up of patients in the Revised National Tuberculosis Control Programme (RNTCP) in Chhattisgarh, India.

Methodology: A record review of tuberculosis (TB) patients registered in 2009 using a structured proforma from two sources, Tuberculosis and Laboratory Register, was undertaken in the six districts of Chhattisgarh, India.

Results: In smear positive cases, of 10,048 follow-up examinations, 45 (0.5%) were found to be smear positive only on the

Ajay Kumar Just now
This is an important article on your topic. Please read this carefully!

Section 5: Citing references and creating a bibliography in MS Word

One of the most popular features of Mendeley is its ability to improve the citing process. Mendeley makes it a lot easier to insert properly formatted citations throughout a paper you're writing - and will automatically generate a bibliography for you. It also allows you to restyle your manuscript's citations with just a few clicks - making it ideal for resubmissions to different journals or publishers.

For this section, we will be using the MS word document titled "citation demo.docx" in "Mendeley course" folder in root of C drive. Please read the comments for more information.

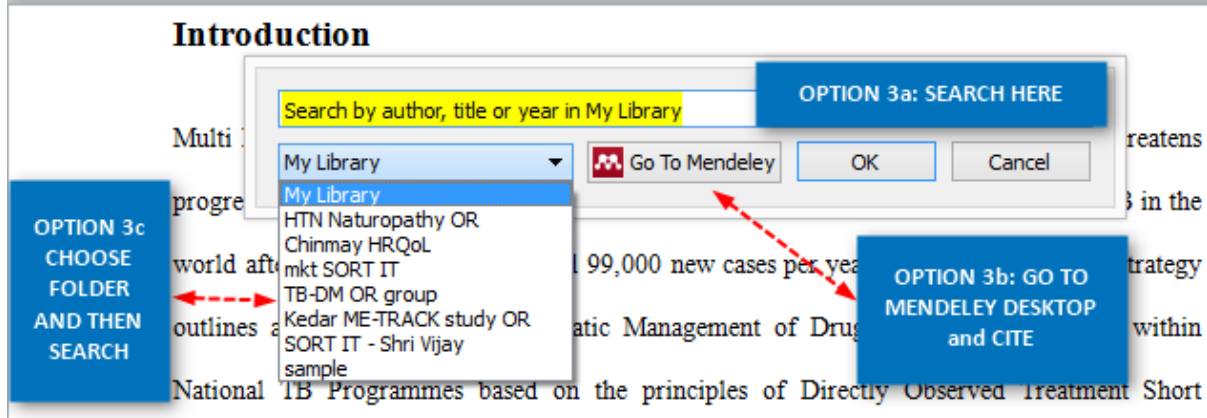
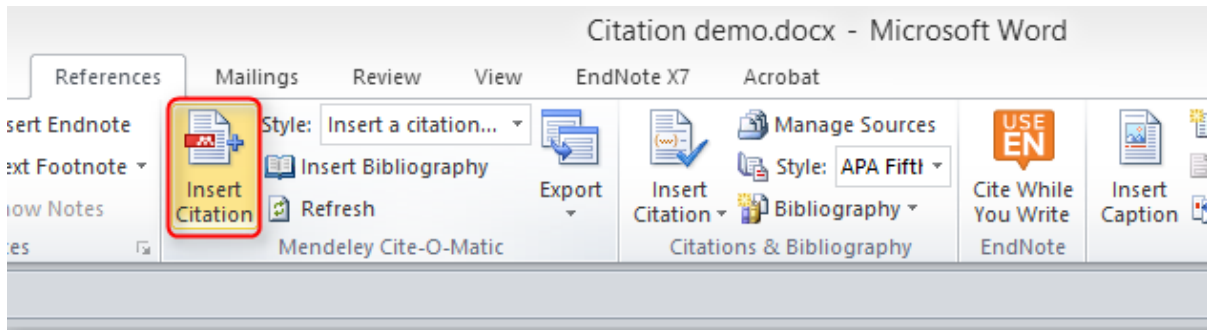
1. Cite references – one at a time

Task: Cite the references as indicated in the "citation demo.docx" document.

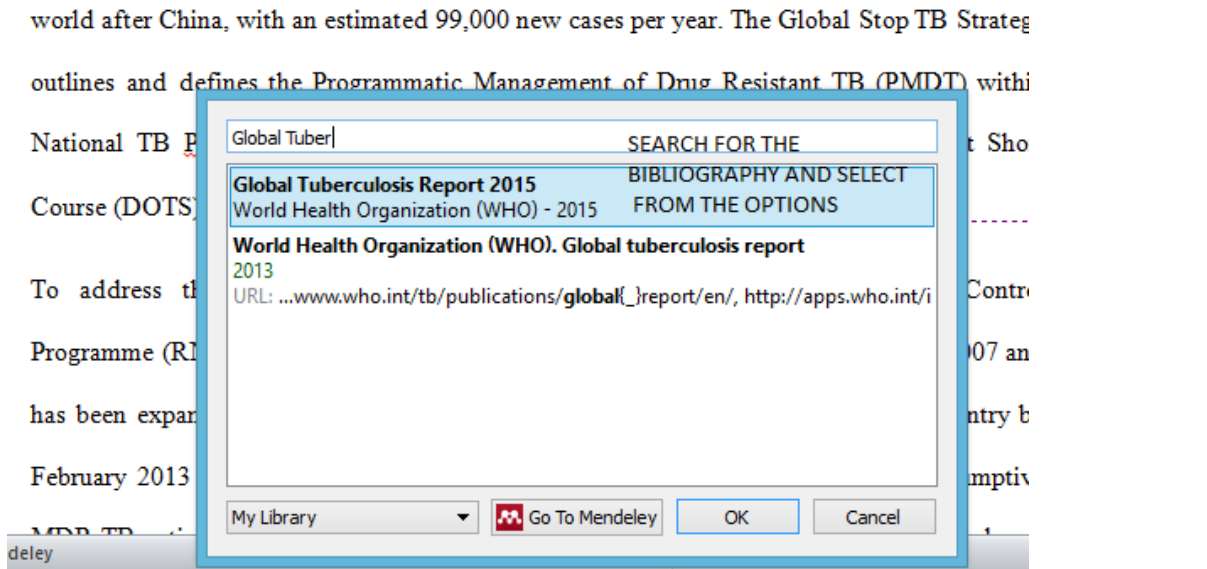
First check whether the references mentioned in the comments section are present in your Mendeley library, include those that are not. Using the Mendeley Cite-O-Matic, we can cite references to texts in MS Word documents. First position the cursor at the appropriate location, in this case, at end of paragraph one. After this, click on 'insert citation' button in the Mendeley Cite-O-Matic under 'References' tab of MS Word document. *(Please note that you need to be running Mendeley Desktop, and will be prompted to start it if it is not currently running)*

Pressing the button will open the Mendeley search tool. This box allows you to enter a term - such as an author name - before returning search results from your library. Locate the reference you want to cite, click to select it and press the Ok button (Option 3a). You will see that the citation is added. Its appearance will vary depending on which citation style you currently have active - we'll discuss more about this shortly.

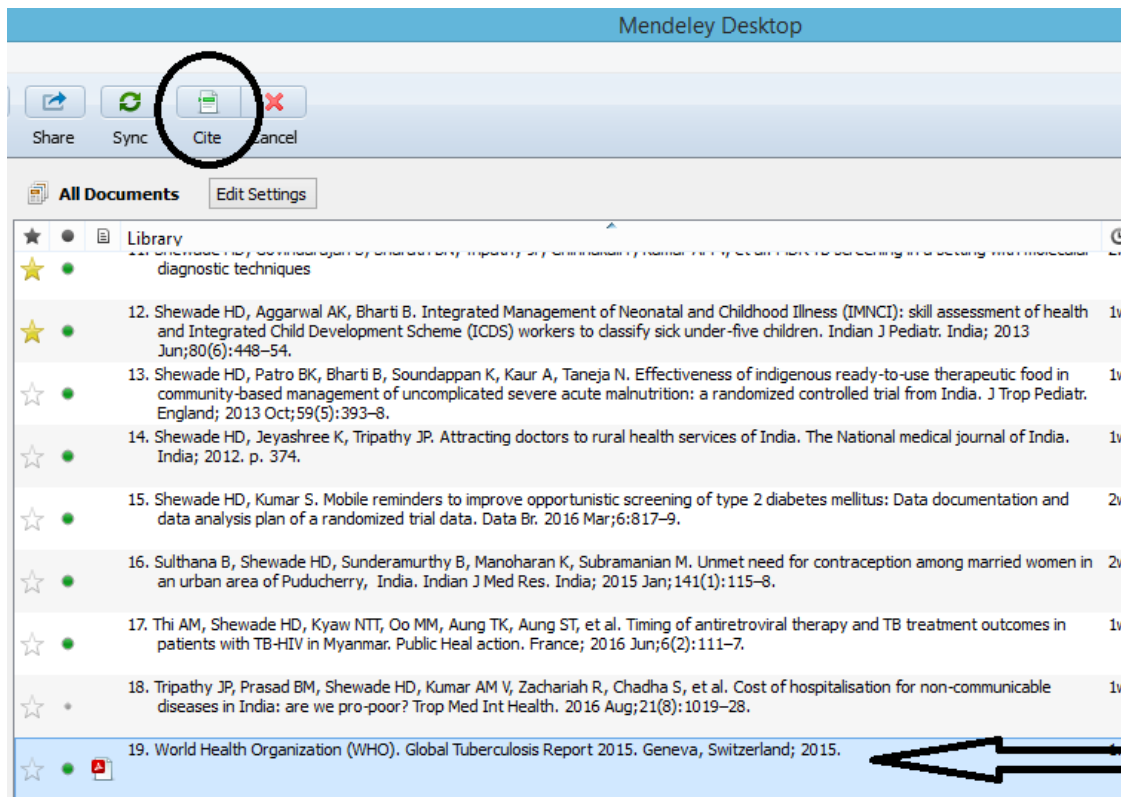
Alternatively, click on 'Go To Mendeley' and select the article and click on 'Cite' button which appears temporarily (see 3b below). You may also focus your search in Mendeley search tool by selecting the specific folder in 'My Library' (see 3c below).



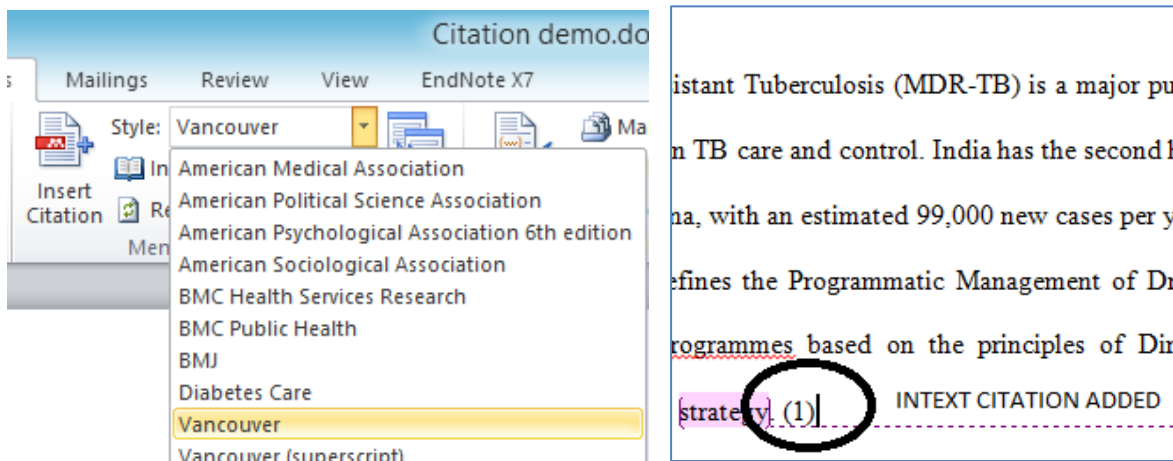
Option 3a



Option 3b



If we chose Vancouver as the citation style in the Mendeley Cite-O-Matic, the in-text citation will appear as a number in round parentheses “(1)”.



Similarly cite all other references (as per the instructions in the comments) in the document from Mendeley Desktop. You will notice that if the same bibliography is cited later in the text, the software gives the same in-text citation (the same number in case of Vancouver style).

2. Cite references – more than one at a time

There could be situations where you would like to cite more than one reference for a statement. In this scenario, you would prefer the in-text citation to appear as “(1-3)” instead of “(1)(2)(3)”. For this it is important to include all three references at once during the steps described above in step 3a or 3b.

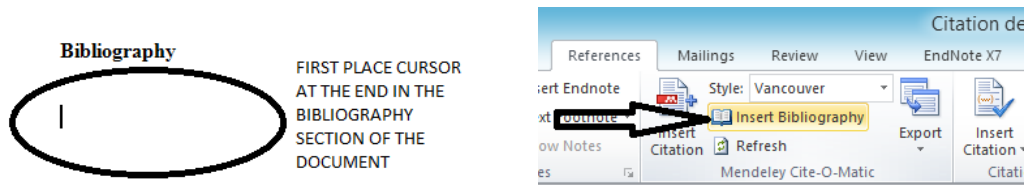
Task: Add the three references (not present in your Mendeley Library) provided to you as ‘My Collections.bib’ BibTex file in ‘Mendeley course’ folder to your Mendeley library.

Do this by importing the BibTex file as mentioned in earlier section. Cite these three references at the end of first sentence of first paragraph of the “citation demo.docx” document.

The image shows two screenshots from the Mendeley software interface. The left screenshot shows a dialog box for importing a BibTeX file. The text in the dialog box reads: "World Health Organization (WHO) 2015;World Health Organization (WHO) 2009;glob", "Global Tuberculosis Report 2015", "World Health Organization (WHO) - 2015", "Global tuberculosis report", "World Health Organization (WHO) - 2013", and "URL: ...www.who.int/tb/publications/global_report/en/, http://apps.who.int/i". Below the text, it says "BEFORE CLICKING 'OK' FIRST SEARCH AND ADD ALL THREE REFERENCES". The "OK" button is circled in red. The right screenshot shows the Mendeley interface with a list of references. The "Import" button in the top toolbar is circled in red, with an arrow pointing to it. Below the toolbar, the text "THEN CLICK HERE" is visible. The list of references includes items 12 through 23, with items 21, 22, and 23 highlighted in blue. An arrow points to the bottom of the list with the text "FIRST SELECT ALL THREE REFERENCES".

3. Create bibliography – add list of references at the end of manuscript

Place the cursor at the end of the manuscript where you want to insert the bibliography or list of references. Then, click on ‘insert bibliography’ in the Mendeley Cite-O-Matic. The bibliography will appear as per the citation style (in this case Vancouver)

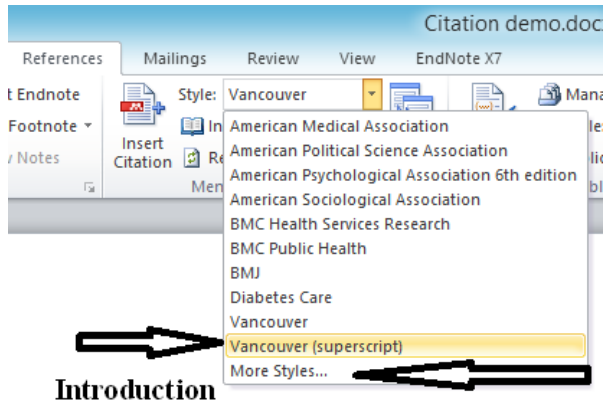


Bibliography

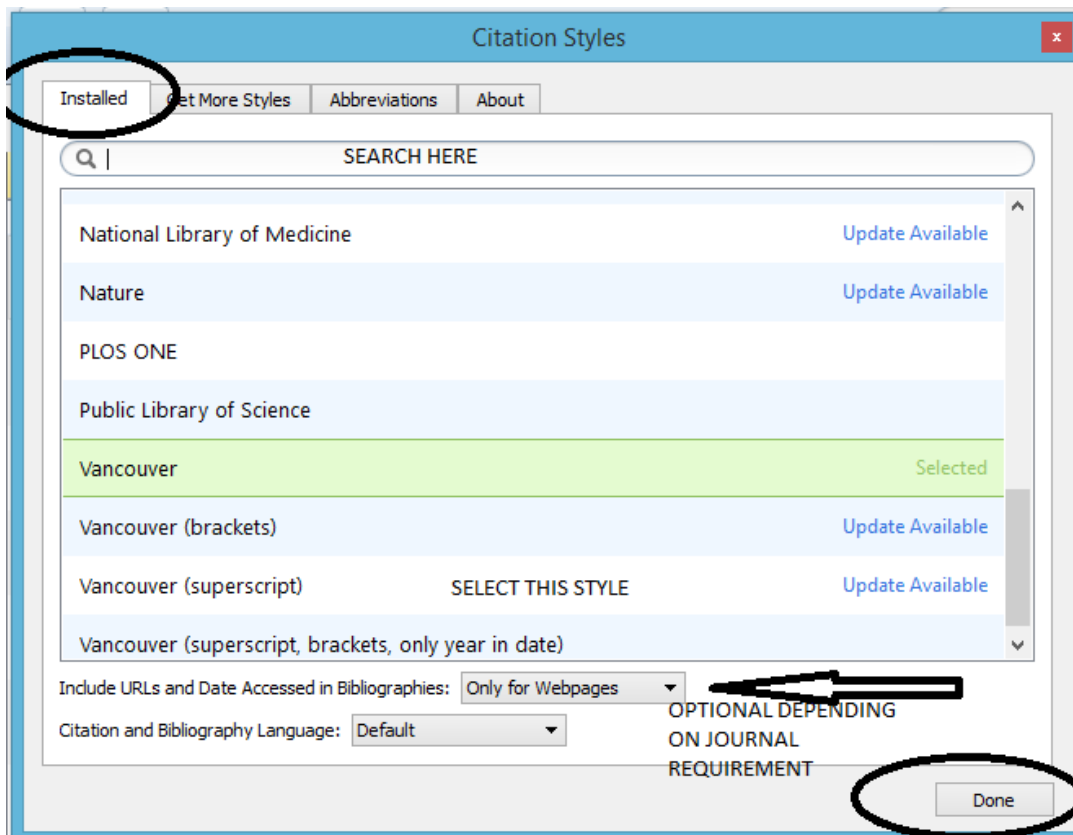
1. World Health Organization (WHO). End TB Strategy (WHO/HTM/TB/2015.19). Geneva, Switzerland; 2015.
2. World Health Organization (WHO). Resolution WHA62.15. Prevention and control of multidrug-resistant tuberculosis and extensively drug-resistant tuberculosis. Sixty-second World Health Assembly. Geneva, Switzerland; 2009.
3. World Health Organization (WHO). Global tuberculosis report. Geneva; 2013.
4. World Health Organization (WHO). Global Tuberculosis Report 2015. Geneva, Switzerland; 2015.
5. Revised National Tuberculosis Control Programme (RNTCP). TB India 2013. Annual Status Report. New Delhi India; 2013.
6. Shewade HD, Govindarajan S, Sharath BN, Tripathy JP, Chinnakali P, Kumar AM V, et al. MDR-TB screening in a setting with molecular diagnostic techniques: who got tested, who didn't and why? Public Heal Action. France; 2015 Jun;5(2):132–9.
7. Hossain ST, Isaakidis P, Sagili KD, Islam S, Islam MA, Shewade HD, et al. The Multi-Drug Resistant Tuberculosis Diagnosis and Treatment Cascade in Bangladesh. PLoS One. United

4. Cite references – editing and merging citations

We edit manuscripts very frequently. We may either edit the references (change the in-text citations) or edit the narrative of the manuscript, in the process changing the order of in-text citations. For re-ordering the references (both in-text and bibliography list), one has to click 'refresh' in the Mendeley Cite-O-Matic. If there is a single reference that has to be changed, delete the existing in-text citation and add a new one. If there are multiple references cited at the same place and you need to edit there, place the cursor in between the in-text citation. As a result, the 'insert citation' in Mendeley Cite-O-Matic changes to 'edit citation'. After clicking on 'edit citation', the dialogue box will open where edits may be made in the references. Do not forget to click on 'refresh' in Mendeley Cite-O-Matic. If multiple references are cited at the same position, but individually it will appear as (1)(2)(3), which is not correct. In such an instance, select all the three citations and click on 'Merge Citations' in the plugin. The citations will be merged properly and shown as (1-3).



And a new window pops up:



Search among installed citation style for Vancouver (superscript). There is also an option whether to include URLs and date accessed only for webpages or for all document types. Choose here 'Only for Webpages'. At the end, click on 'Done'.

If you want to add a citation style which is not currently available among the installed citation styles, then one may click on the tab 'Get more Styles', search for the style, if available, (say BMJ open), and install it.



Then under 'installed', search for BMJ Open, select it and click on 'Use this style' followed by 'Done', citation style will change to BMJ Open in your "citation demo.docx" document.



Mendeley allows you to use over 6000 different citation styles - but comes pre-installed with some of the most commonly used, such as APA, Harvard and Vancouver. What do you do if the style you want is not readily available? Then, you need to create one customized to your needs. Saved styles are added to the Mendeley database, and will appear in your drop-down menu in Word.

We will learn that in the next section.

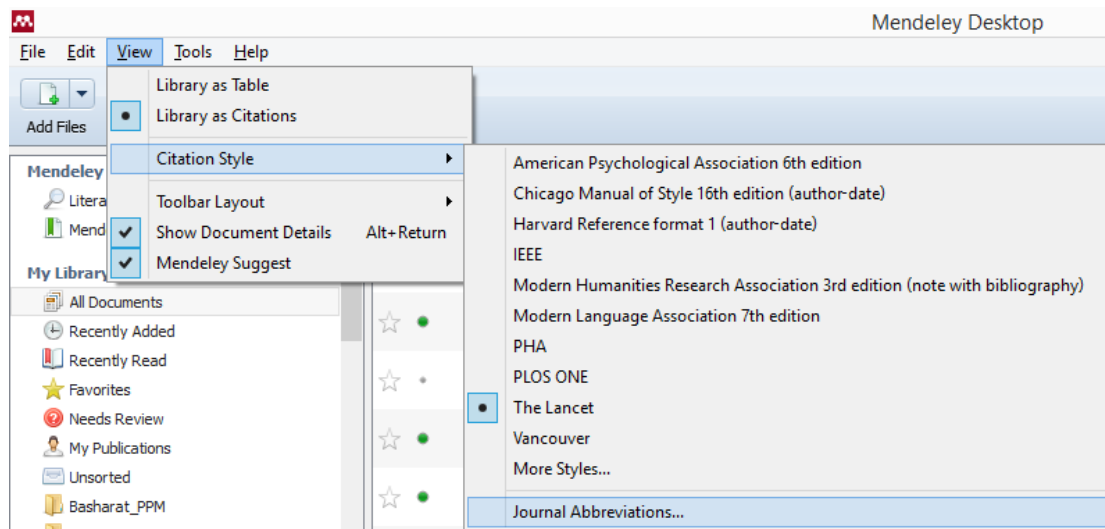
Handling journal abbreviations

One of the common rules most journals follow is that the name of the journals in the bibliography should appear in the standard abbreviated form and not in full. For example, the standard abbreviation of the journal 'Bulletin of the World Health Organization' is 'Bull World Health Organ'. While all the journals indexed in PubMed have standard abbreviations, those journals not PubMed indexed do not

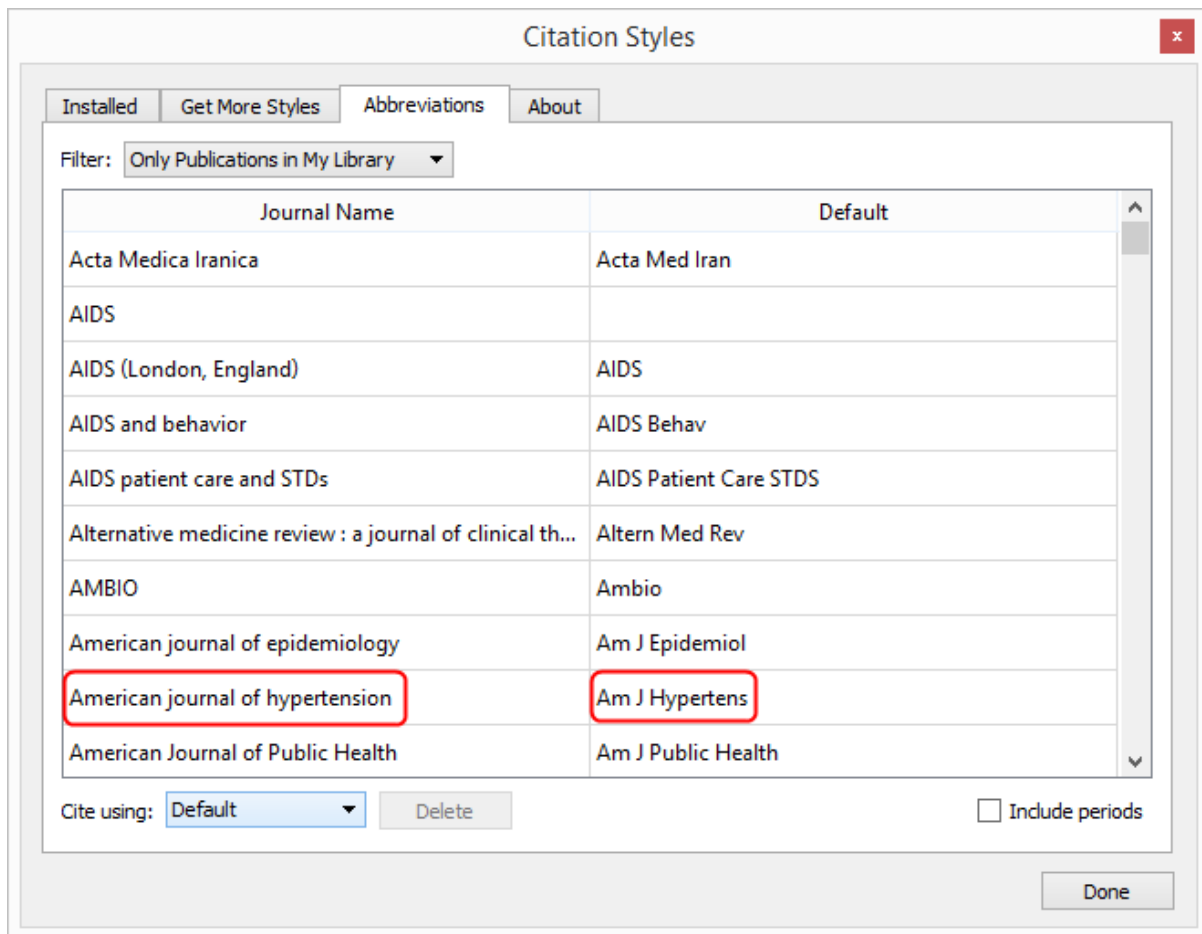
have one. In such instances, Mendeley tries to suggest an abbreviation intuitively, which of course, is not correct. In such instances, it is important to correct it.

How do you do it?

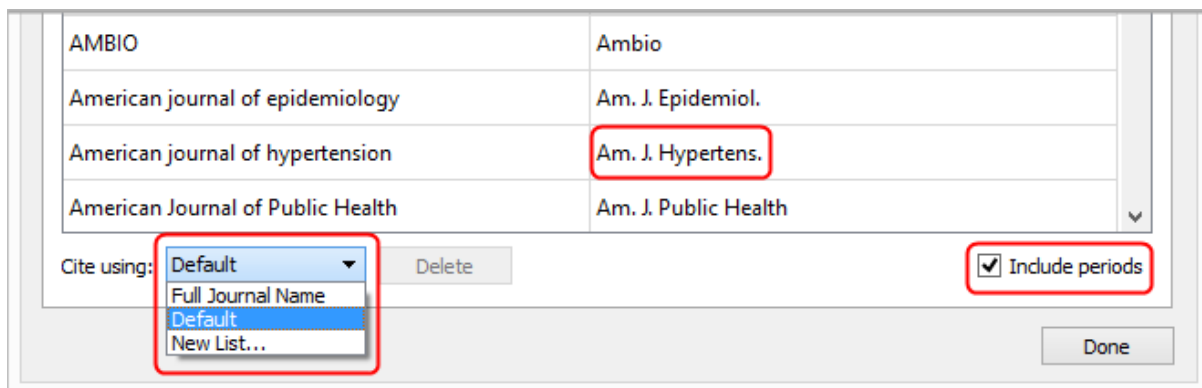
First go to 'View' in the menu bar and click on 'Citation Style' and under that, click on 'Journal Abbreviations' as shown below.



A new dialog box pops up (see below). Here, you may notice the names of the journals and their default abbreviations.



By default, citations use the abbreviations. If the full name of the journal has to be cited instead of abbreviations, it may be indicated by one of the dropdown options under 'Cite using' (see below). Also, you may choose to tick on 'Include periods' to suit some journal styles as required. Note below how the abbreviation changes from 'Am J Hypertens' to 'Am. J. Hypertens.'



Section 6: Editing citation styles to create new styles

Mendeley uses the Citation Style Language (CSL) standard (<http://citationstyles.org/>). CSL is an open standard to define styles. The styles are processed using citeproc.js (<https://github.com/juris-m/citeproc-js>). Mendeley regularly fetches new styles from the CS project repository (<https://github.com/citation-style-language/styles>). Any new styles you create can be submitted to this repository, so that the same may be shared with the research community. You may edit existing styles or create new styles using CSL Editor (<http://editor.citationstyles.org/about/>).

While you may learn to create a citation style from scratch, the most efficient way is to choose an existing style which closely matches the new journal style you want and edit it to suit your requirements. In this exercise, we will learn how to use Vancouver style and edit it to create a new style for the journal 'International Journal of Tuberculosis and Lung Disease'. While IJTLD uses the Vancouver style fundamentally, there are minor variations of its own. A list of variations is listed below:

- The in-text citation is in the form a superscripted number without parentheses, like ¹ instead of (1).
- When the number of authors in a paper is more than six, Vancouver style recommends to cite the names of the first six authors followed by et al.
- In IJTLD, the recommendation is to cite only the first three authors followed by et al in such instances.
- The issue numbers are not included in IJTLD. Only the year is displayed in IJTLD compared to year-month-date format in Vancouver.
- The page numbers in the bibliography are displayed in full in IJTLD rather than short form in Vancouver (example 577-579 in IJTLD instead of 577-9 in generic Vancouver).

First, go the webpage <http://editor.citationstyles.org/about/> and you will see something like this.

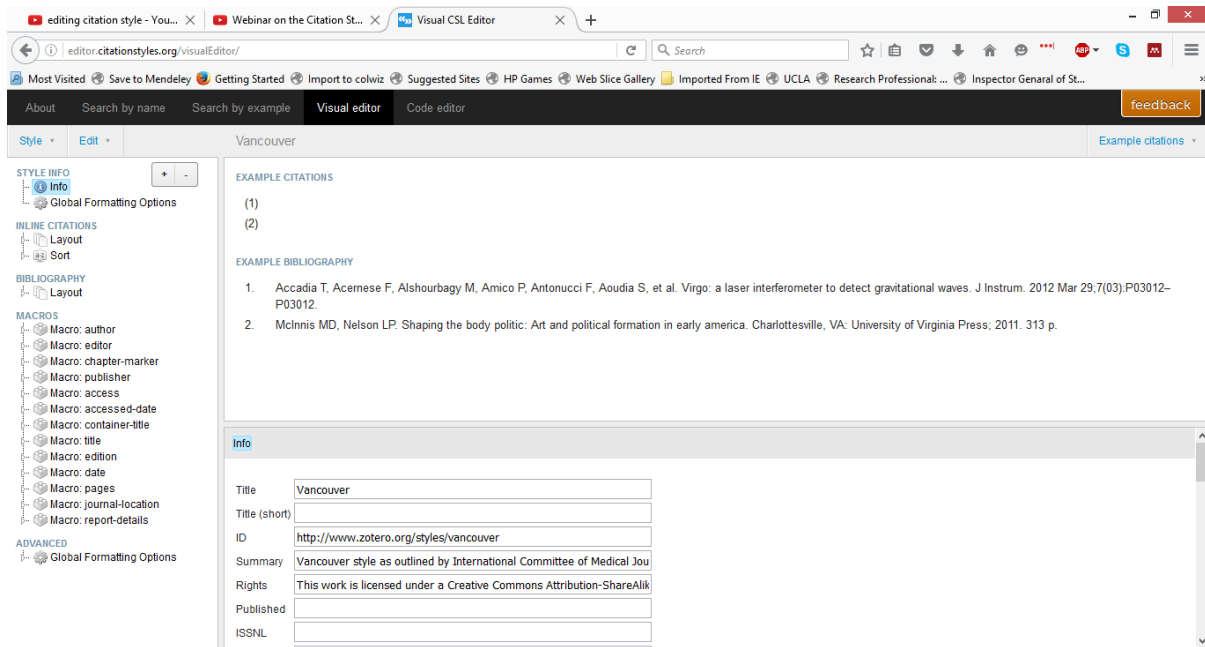
The screenshot shows the website's main interface. At the top, there's a navigation bar with 'About', 'Search by name', 'Search by example', 'Visual editor', and 'Code editor'. The main heading is 'Find and edit CSL citation styles'. Below this is a search bar with the placeholder text 'Search...'. The page is divided into three columns:

- 1. Find a style**: Contains two sub-sections: 'Search by name' and 'Search by example'. 'Search by name' explains that if you're looking for a style like APA, Harvard, etc., you just use the search box at the top. 'Search by example' explains that if you don't know the name but know the final citation should look like, you can use the 'search by example' tool.
- 2. Edit the style**: Shows a preview of a style for 'American Journal of Medical Genetics'. It displays the 'INLINE CITATION' as '(McInnis and Nelson, 2011)' and the 'BIBLIOGRAPHY' as 'McInnis, M. D., & Nelson, L. P. (2011). *Shaping the Body Politic Formation in Early America*. University of Virginia Press.' Below this are buttons for 'Install', 'Edit', and 'View code'.
- 3. Use the style**: Explains that once you've found a style that's suitable for you to use, you simply click the 'Install' button on the search results, or 'Save' a style you've edited, to use it in your reference manager.

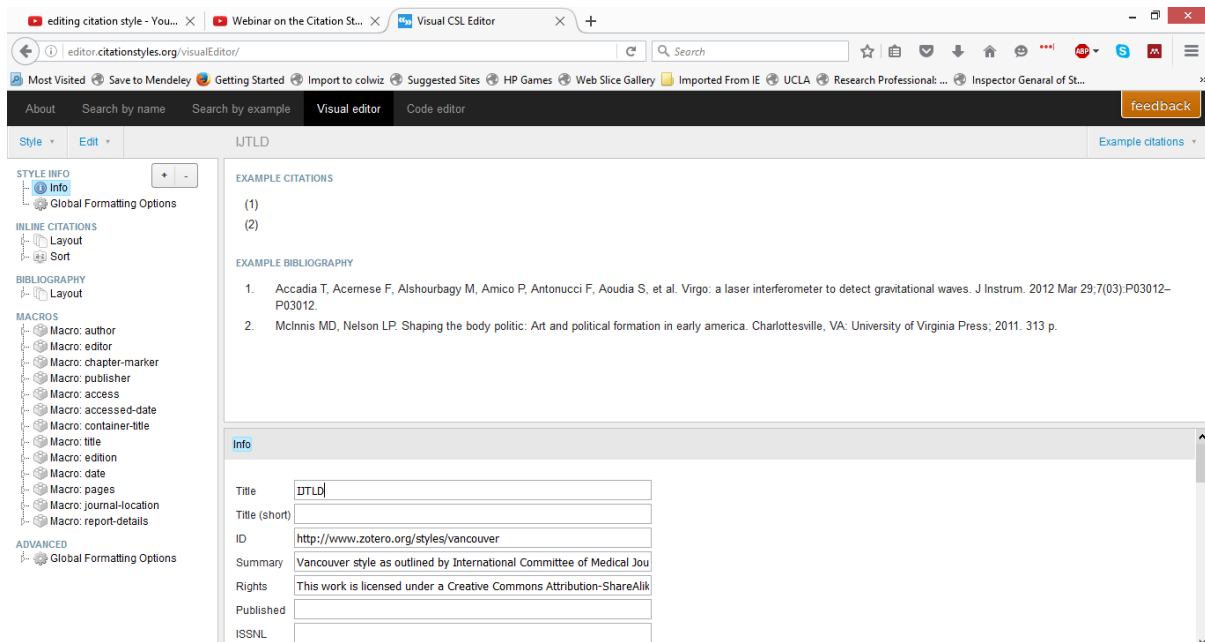
As mentioned above, we will find Vancouver style and edit it to create a style for IJTL. For this, click on 'Search by name' and type 'Vancouver' in the search bar. A total of 18 different Vancouver styles appear. Browse through and pick the closest one you need.

The screenshot shows the search results page for 'Vancouver'. The search bar contains 'Vancouver' and the 'Search' button has been clicked. The page displays 'Displaying 18 results:'. The first result is 'Vancouver' (POPULAR). It shows the 'INLINE CITATION' as '(1)' and the 'BIBLIOGRAPHY' as '1. Accadia T, Acernese F, Alshourbagy M, Amico P, Antonucci F, Aoudia S, et al. Virgo: a laser interferometer to detect gravitational waves. J Instrum. 2012 Mar 29;7(03):P03012–P03012.' Below this are buttons for 'Install', 'Edit', and 'View style'. The second result is 'Elsevier Vancouver' and the third is 'Nature Publishing Group Vancouver'. Both also show the same citation and bibliography information.

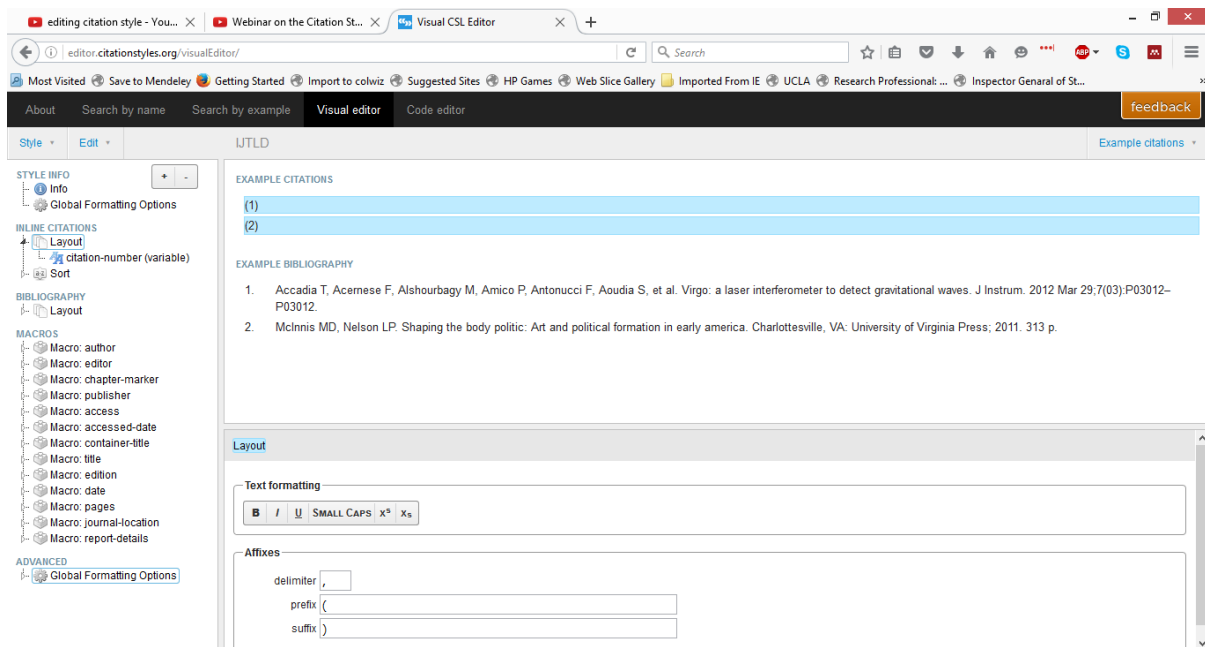
In this case, I will choose the generic Vancouver style and begin from there for the purposes of demonstration. Click on 'Edit' under Vancouver (the first in the list) and proceed.



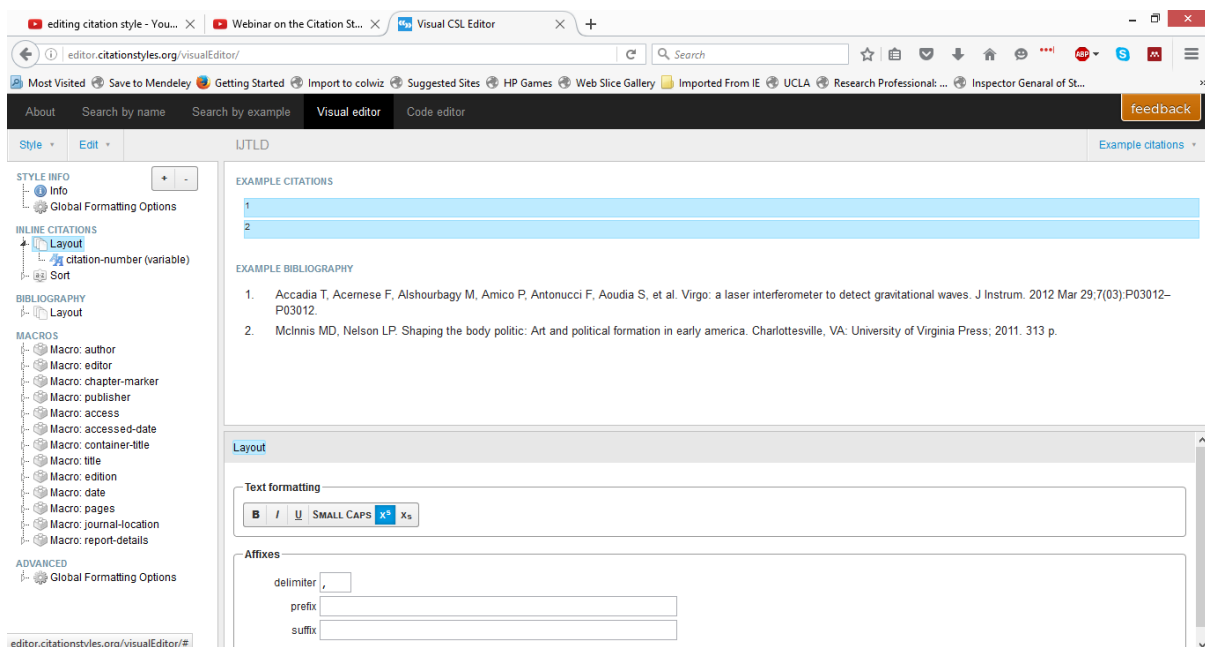
First, change the name of the style from Vancouver to IJTLD under Info. Ignore the rest of the fields under Info for the moment.



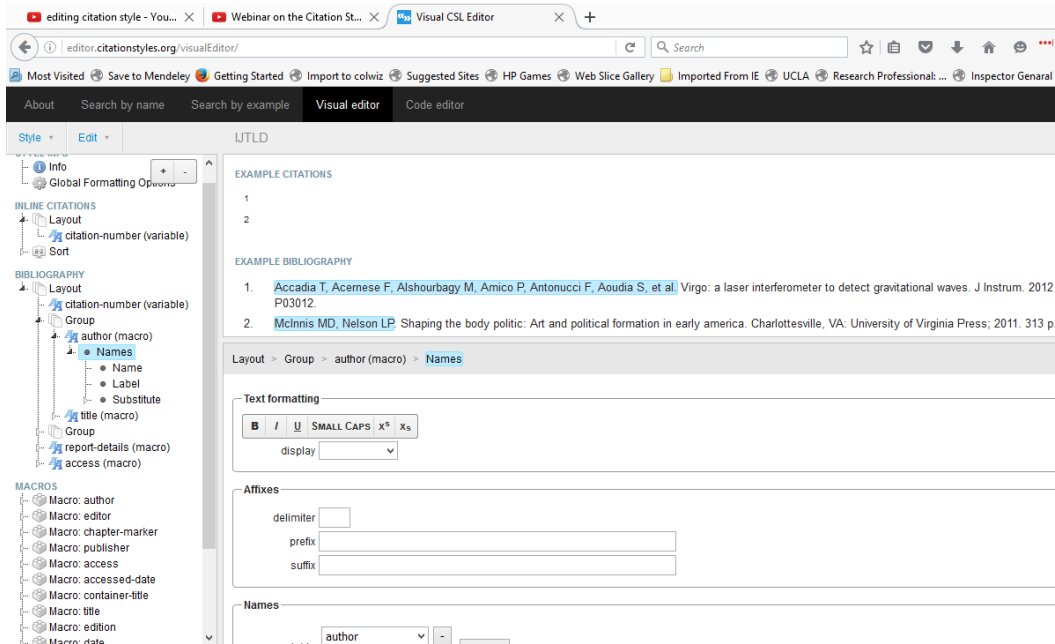
Let us first handle the way the in-text citation appears. Click on the (1) under EXAMPLE CITATIONS on the top.



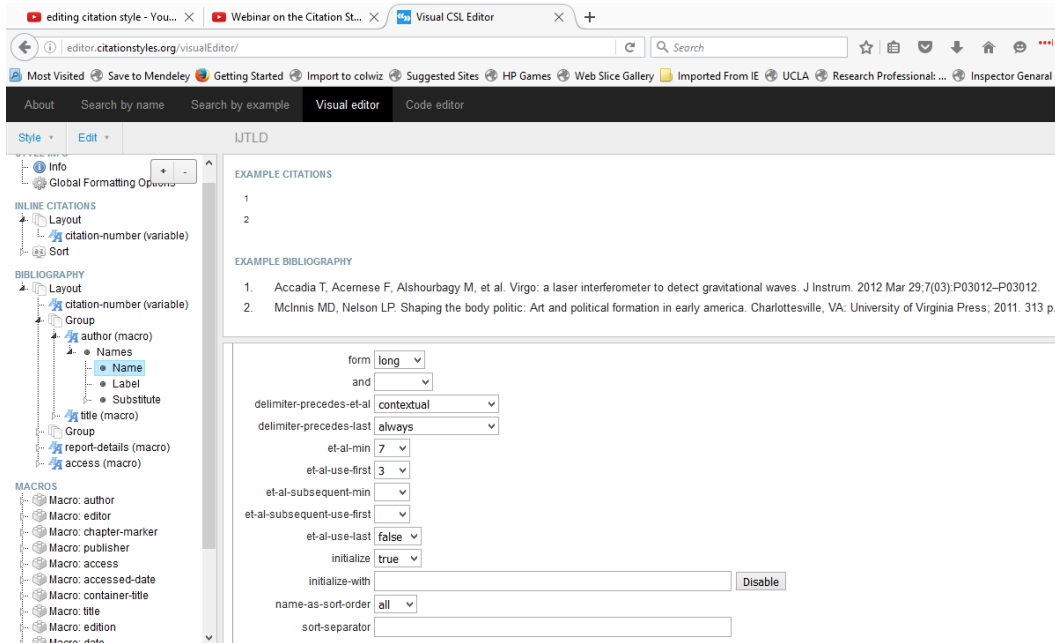
Look at the bottom how the layout has changed. Intuitively, you can see the prefix and suffix. Let us first delete those as we do not want the parentheses around the numbers. Also, click on x^s under 'Text formatting' to make the number in superscript and note how it changes under 'EXAMPLE CITATIONS'.



Next, let us look at the changes required in the bibliography. First, let us handle the number of authors issue. Click on the authors under ‘EXAMPLE BIBLIOGRAPHY’. Note how the layout changes in bottom and some fields in the side navigational panel gets highlighted.

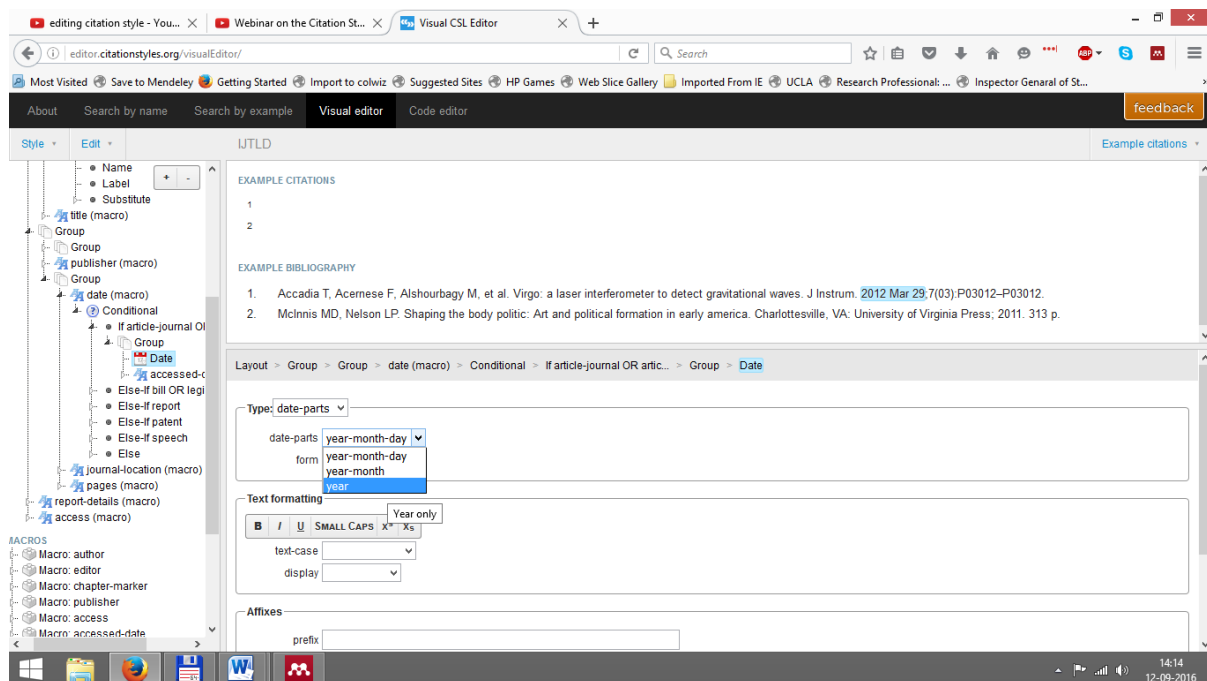


In the navigational panel, click on ‘Name’ subheading under the ‘Names’.

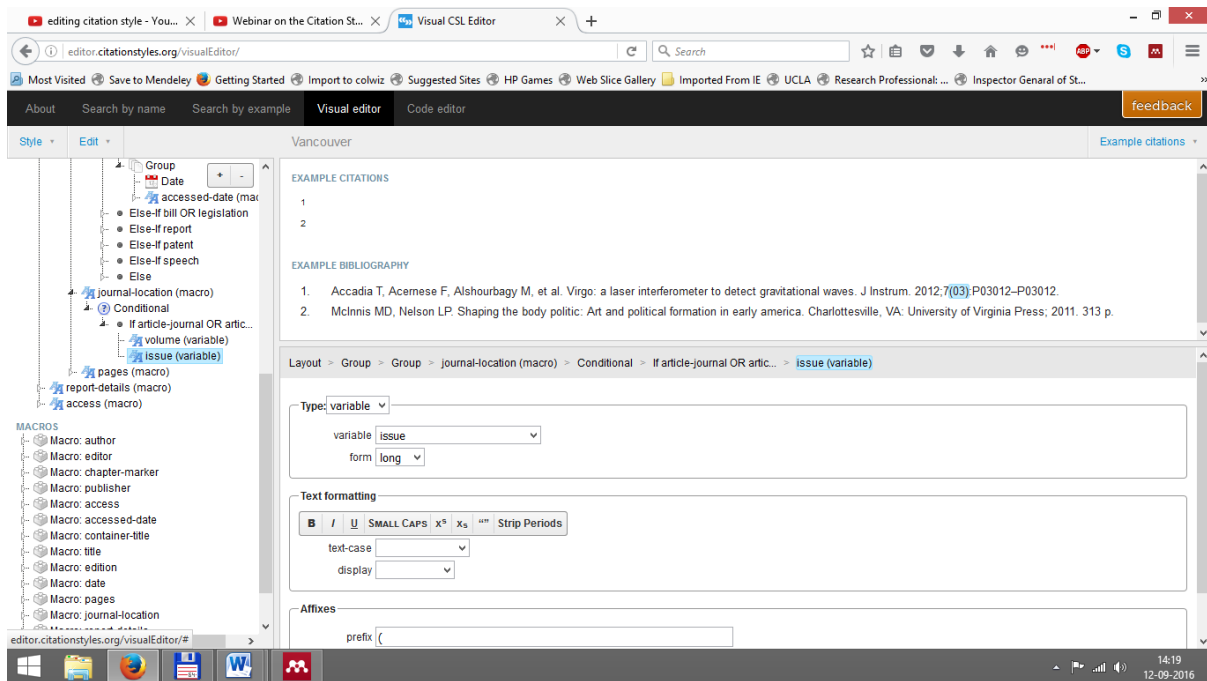


From the field 'et-al-min' choose 7, which is the minimum number of authors required to activate the expression et al. And, choose 3 in the field et-al-use-first to indicate the number of authors that need to be displayed in such an instance followed by et al. Notice how example 1 changes to three authors followed by et al.

The next change that is required is to display only the year of publication and not the year-month-day. Again, if you want to change that, first click on the field in the bibliography. Under the drop down options under date-parts field, choose 'year'.

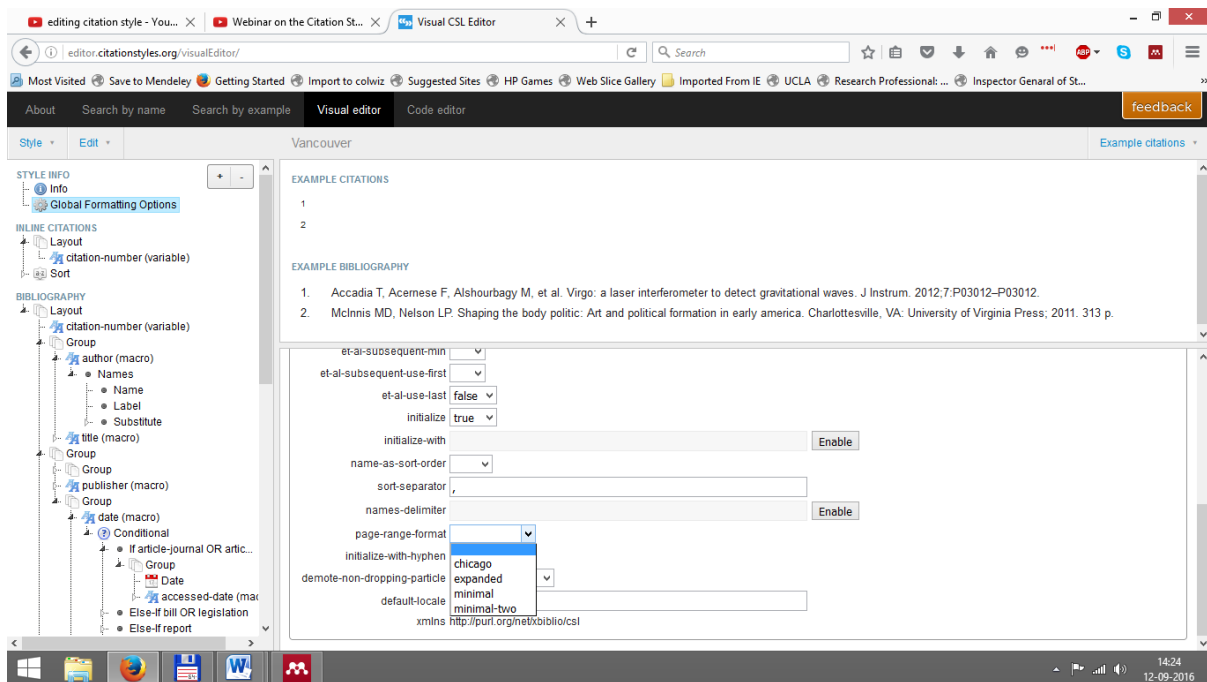


The next change that is required is to delete the issue number from the bibliography. Let us first click on the issue number.

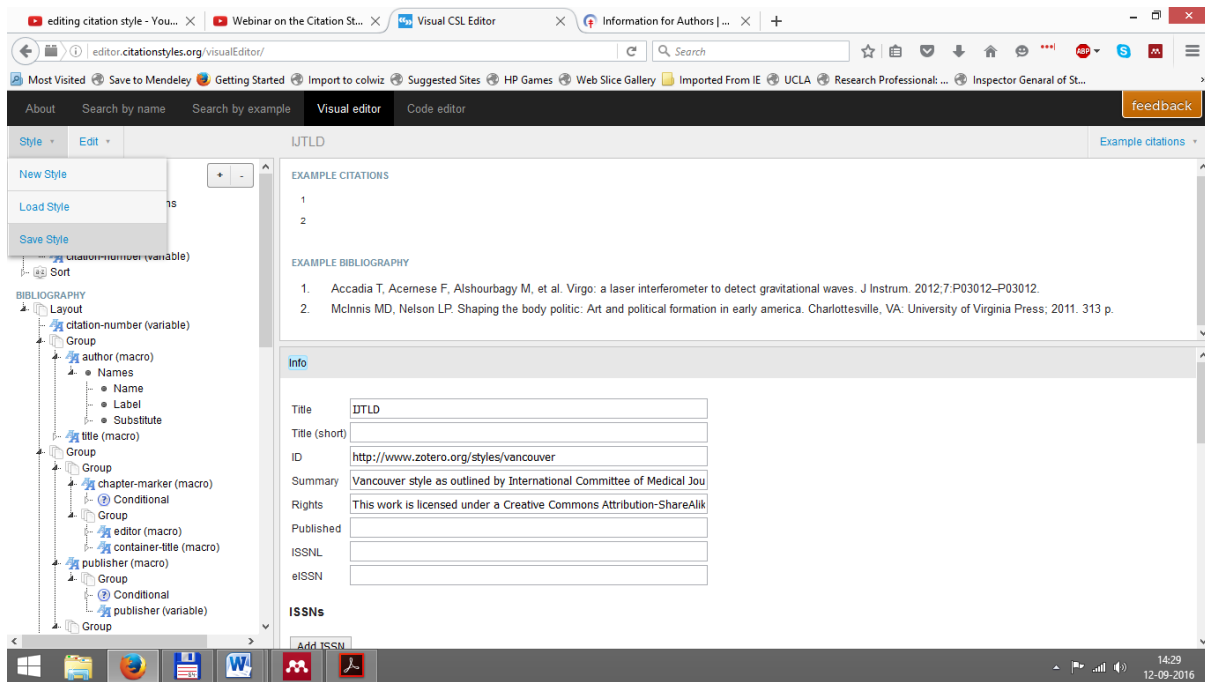


Now, click on issue (variable) in the side panel and press the DELETE button on your keyboard.

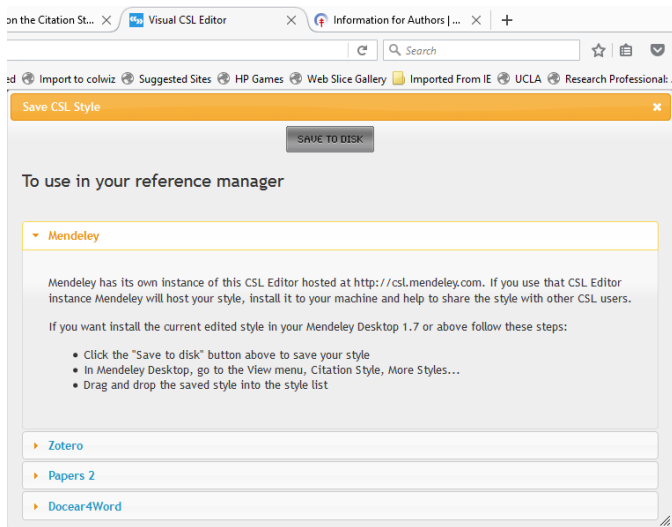
Next, let us change the page number display. Normally, to display the page numbers in full, we choose the 'long form' option in the page field. If this is not working properly, try deleting page-range-format="minimal" from global formatting options.

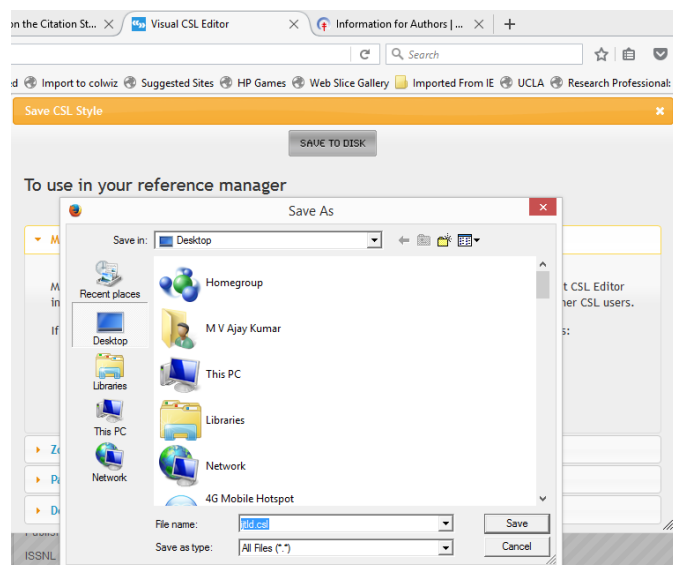


Now, let us save this edited style. To do this, click 'Save Style'

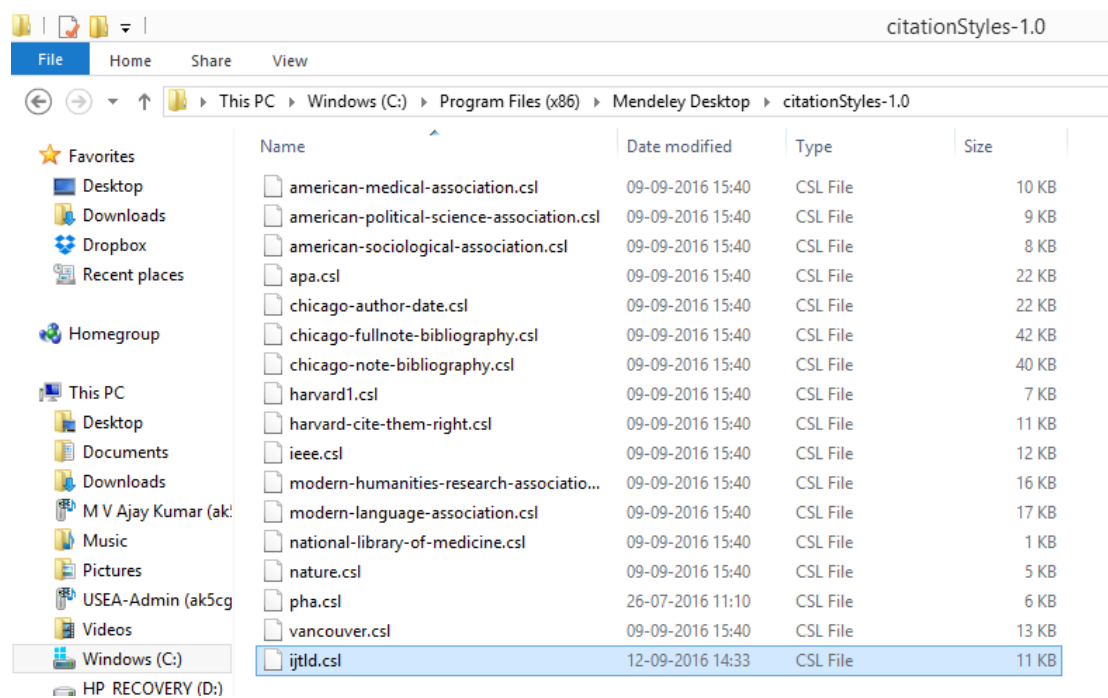


And click OK on the next popup that appears. Then click on 'Save to Disk' and save it at a convenient place in your computer for now (let us say on Desktop).





The file `ijtd.csl` should then be copied from the desktop and placed in your styles folder, most commonly found here `C:\Program Files (x86)\Mendeley Desktop\citationStyles-1.0` (This path could vary depending on the configuration in your computers).



Once it is here, this can be used from within Mendeley Desktop as described before.

If you want to learn the details of creating and editing citation styles at your own pace, please watch this excellent webinar <https://www.youtube.com/watch?v=7dUwAKVmCqQ>

Section 7: Working in Groups and discovering new literature

Let us talk a bit about sharing now. Quite often you may want to share materials with other Mendeley users - or even to collaborate directly on a particular paper.

Groups are Mendeley's solution to the problem of collaboration. They allow you to come together with other users and to share resources. You can create new groups at any time by using the 'Create Group...' option. The process is quick and easy.

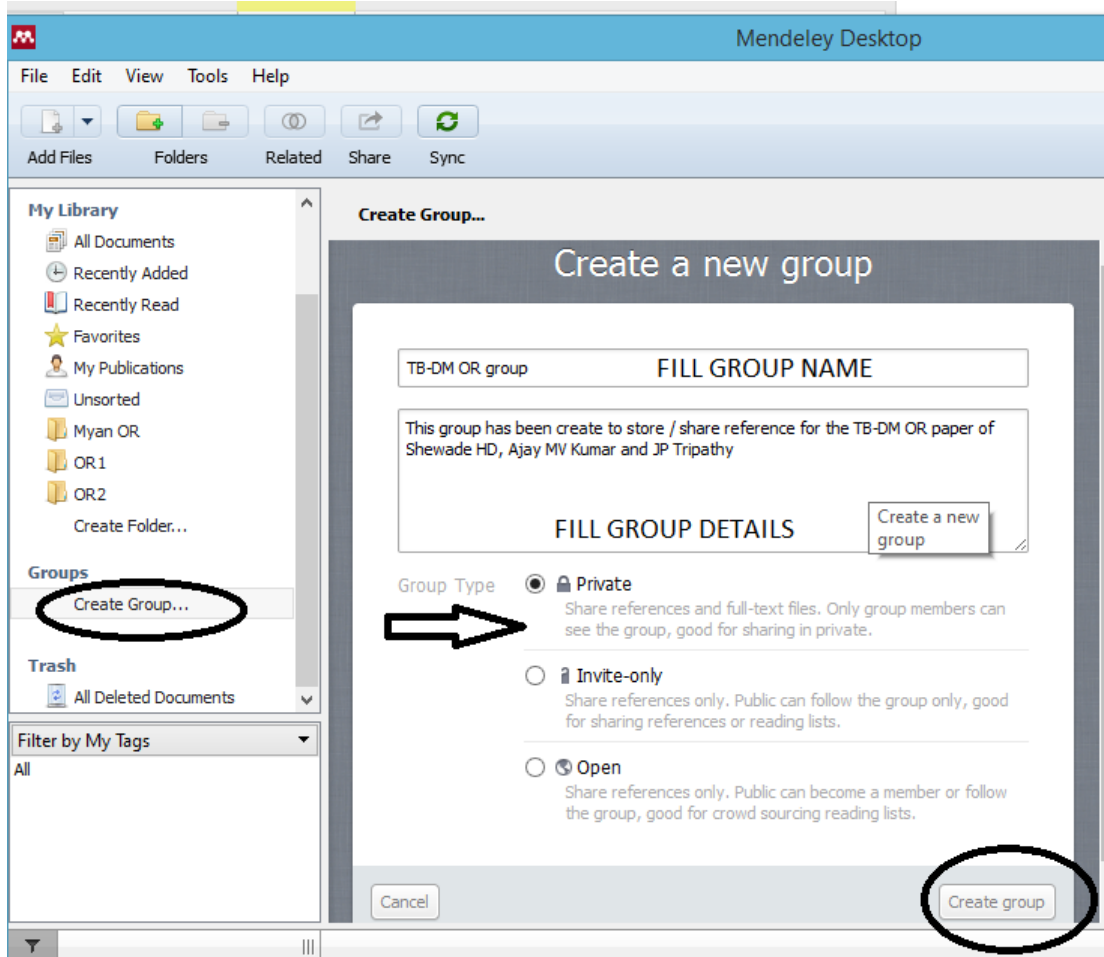
Mendeley offers three different types of groups.

- **Open Public Groups:** These groups are publicly visible and accessible to anyone. They will be listed in the 'groups' directory on Mendeley's website. Members can add references to the group - but only the reference details will be added.
- **Invite-only Public Groups:** These groups are publicly visible, but membership is controlled by the group administrator. Anyone can 'follow' the group to access the references, but only full members can add or edit references.
- **Private Groups:** These groups are not publicly visible. Members need to be invited. Members can share full-text papers with each other, and can also collaboratively highlight and annotate on these materials.

Once you have created or joined a group, you will see them listed in the left-hand panel of Mendeley Desktop - underneath your personal folders. To add references to a group, just drag and drop them onto the group name.

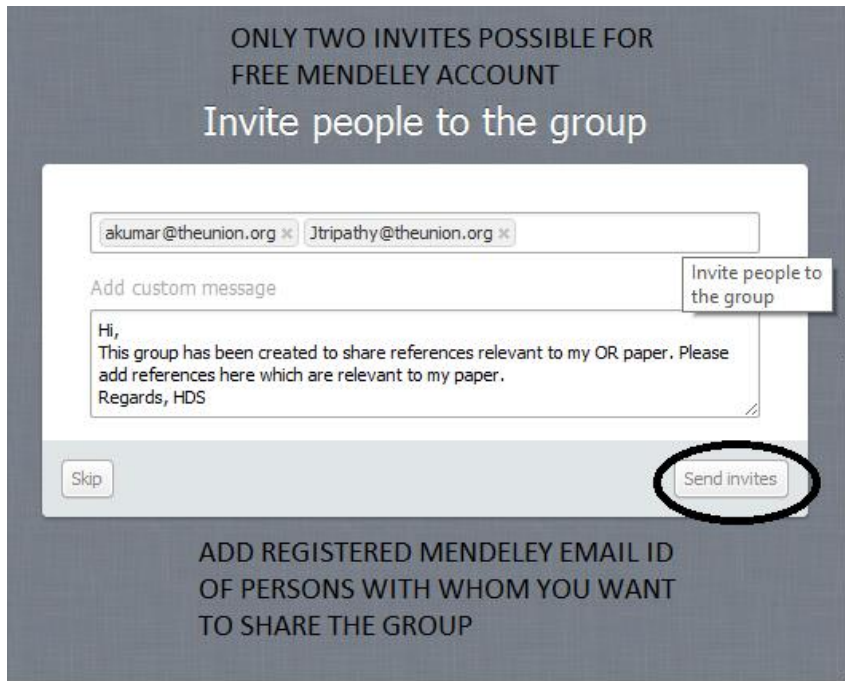
Step 1: Create a shared collection

First click on 'create group' in the left hand side as shown below in Mendeley Desktop. Then fill the group name, group details and select the group type.

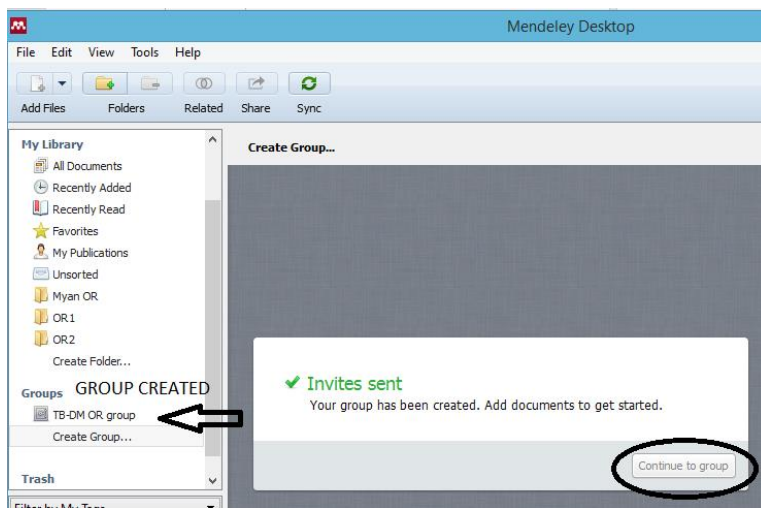


2. Invite members

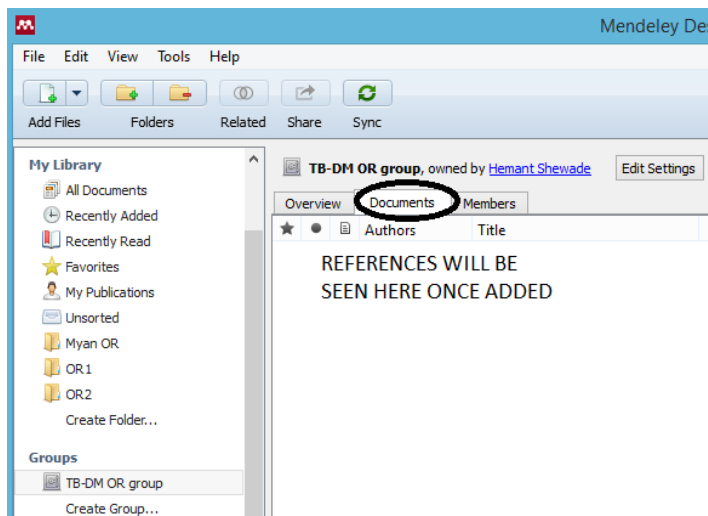
Then, add the email ids of those whom you want to include in the group.



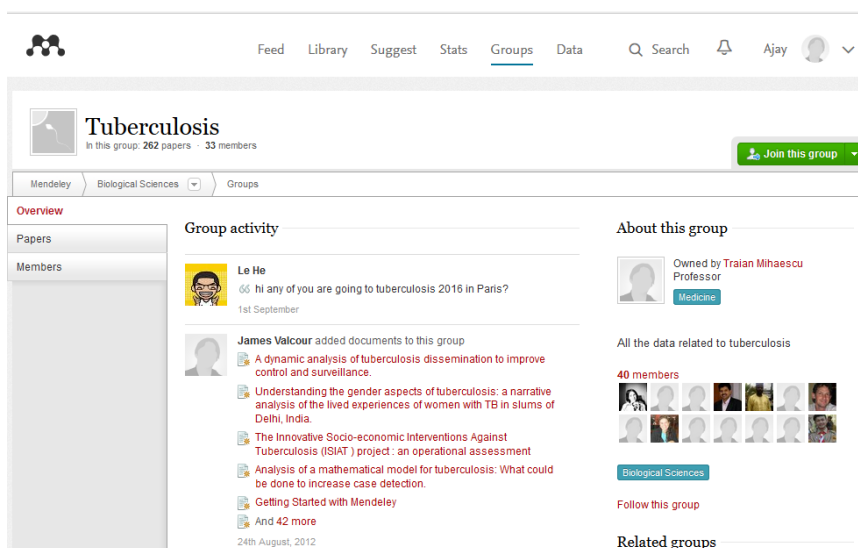
One can add only two members, limiting it to three members (including you) in the free Mendeley account. Then click on 'send invites'. Once the invites are accepted the invitees will be seen under the 'Members'.



Step 3: Add Documents to the collection to share with members

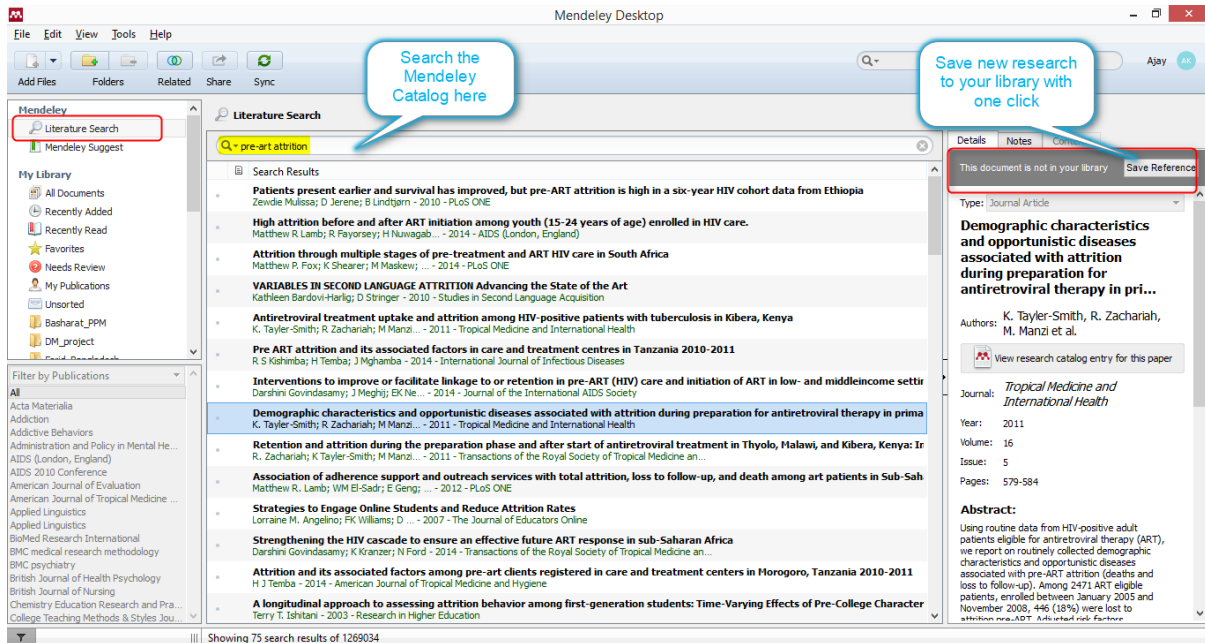


You can also browse popular public groups by subject to locate popular groups associated with each topic. Joining public groups is also a good way to connect with other Mendeley users who are active in your field. This can lead to collaboration and sharing of resources.



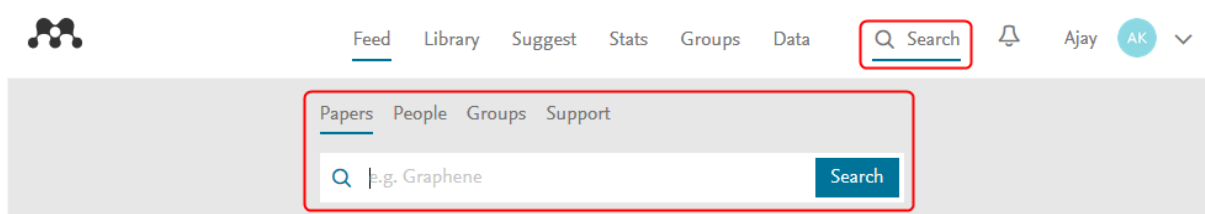
In addition to groups and individuals, Mendeley also offers you the ability to discover new research. By drawing on the crowd-sourced catalogue of materials, Mendeley can draw on one of the largest resource libraries available online - one that's continually growing as users add more materials.

If you know the name of a paper or if you have a specific topic in mind, you can use the Literature Search setting from within Mendeley Desktop. This allows you to retrieve new references from the Mendeley Web Catalogue.



As the Catalogue is crowd-sourced, the Literature Search can only retrieve papers that have already been added by other users - so if your desired result is a very new or obscure paper, you may not be able to retrieve it. If the full text of a paper is available - for example, if the paper is open access - you will see a download icon allowing you to download it.

You can also search the catalogue online via Papers tab. If you're logged into your Mendeley account, you will be able to save the resulting references straight to your library.



Finally, from within Mendeley Desktop you can select multiple papers within your library, and right click to be given a list of papers connected with the items you selected. This can allow you to discover new resources connected to a set of materials - such as the items within a particular folder - and can be handy for finding niche topics or interests.

↑

All Documents Edit Settings

★ ● 📄	Authors	Title	Year	Published In
★ ●	Achanta, S; Tekumalla, R R; J...	Screening tuberculosis patients for diabetes in a tribal area in South India	2013	Public Health Actio
★ ●	Achanta, Shanta; Jaju, Jyoti...	Tuberculosis management practices by private practitioners in Andhra Pradesh, India.	2013	PloS one
★ ●	Achanta, Shanta; Kumar, Aja...	Feasibility and effectiveness of provider initiated counseling of TB suspects in Vizianagaram dist		
☆ ●	Aggarwal, Ashutosh N	Health-related quality of life: A neglected aspect of tuberculosis.		
☆ ●	Ahmed, Jameel; Ahmed, Mub...	Public private mix model in enhancing tuberculosis in District Thatta, Sindh, Pakistan.		

Update Details

🔍 Related Documents

Open File

Open File Externally

Open Containing Folder



📄 Related Documents

4 results based on 'Tuberculosis management practices by private practitioners in Andhra Pradesh, India.'

Close

📄 Search Results

- Tuberculosis management by private practitioners in Mumbai, India: Has anything changed in two decades?**
 Zarir F. Udhwadia; LM Pinto; MW Uplekar - 2010 - PLoS ONE
- Tuberculosis management practices of private practitioners in Pune Municipal Corporation, India**
 Sandeep Bharaswadkar; A Kanchar; N Th... - 2014 - PLoS ONE
- Impact of advocacy on the tuberculosis management practices of private practitioners in Chennai City, India**
 Nalini Krishnan; R. Ananthakrishnan; S... - 2009 - International Journal of Tuberculosis and Lung Disease
- Ethnoveterinary practices in northcoastal districts of Andhra Pradesh, India**
 V. Lakshminarayana; GM Narasimha Rao - 2013 - Journal of Natural Remedies