USING ENDNOTE X2: ADVANCED SKILLS

EndNote is a bibliographic management software package – a database designed specifically to handle citation information. It can be used:

- to keep track of references
- to cite references quickly and easily from within a word processor
- to format and reformat reference lists easily from within a word processor
- as a searchable catalog for your reprint files

This help sheet provides information on:

- working with reference types
- working with term lists and the journal list
- working with import filters
- working with output styles

- formatting multiple documents to create a single bibliography
- using connection files
- setting program preferences

A second EndNote help sheet, *Using EndNote: Basic Skills*, is available from the Library (*http://www.utoledo.edu/library/mulford/education/bibmgmt.html*) and provides information on using EndNote. For additional assistance, contact Mulford Reference Assistance (419-383-4218, *MulfordReference@utoledo.edu, or http://utoledo.edu/library/mulford/resources.html*), consult EndNote's online help or the online manual (*http://www.endnote.com/support/enx2man-terms-win.asp*).

Requirements to run ENX2: Windows XP (SP 2) or Vista; Pentium 450-MHz minimum, 180MB hard disk space available, and 256 MB RAM. Cite While You Write is compatible with Microsoft Word 2003 and 2007.

University of Toledo Health Science Campus faculty, staff, and students can obtain a **free copy of EndNote for home use**. For details, go to the Information Systems web page: *http://www.is.mco.edu/endnote_home.htm*.

Working with Reference Types

Understanding reference types

The basis of reference management in EndNote is the reference type. From importing citations to formatting references in a bibliography, the reference type determines how EndNote handles pieces of bibliographic information. *If the reference type is incorrect, it is very likely that the final formatted reference will be incorrect.* There are 48 reference types (44 predefined types, 3 unused types, 1 generic type), all based on a generic type. The predefined reference types cover a wide range of resource types (journal article, book, book section, manuscript, edited book, newspaper article, conference proceedings, thesis, report, personal communication, web page, audiovisual material, etc.).
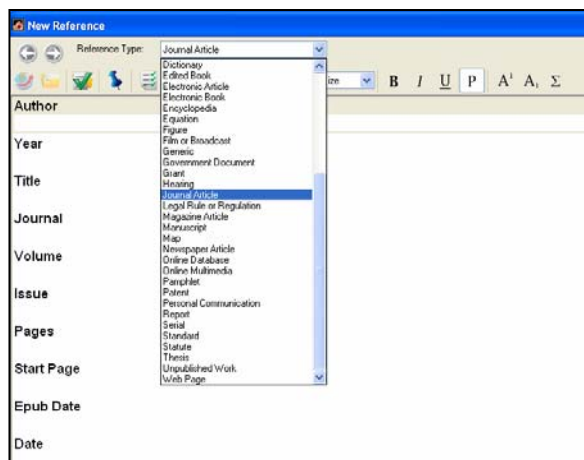
Each reference type consists of a collection of labeled fields, which vary based on the reference type. For example, the book type includes fields for publisher and place of publication, two fields that are not available in the journal article type. It is best to select the reference type before entering the bibliographic information in a reference; however, it can be changed at any time using the Reference Type drop-down menu at the top of the reference window.

Customizing reference types

Field labels for all reference types except generic can be modified. To modify field labels for a type, go to the **Preferences** option under the **Edit** menu. Click on the **Reference Types** option, and then click on the **Modify Reference Types** button. Choose the reference type to be modified from the drop-down menu.

For any reference type, only those fields with a label are displayed in the reference window. For example, **Number of volumes** will not be a field option for a journal article.

Modifying field names and adding new fields to a reference type

The left column of the table lists the field names for the generic reference type, which cannot be modified. A field in the generic type is used to refer to fields in the corresponding row for the specific reference type. Fields in specific reference types may also inherit some characteristics from the corresponding field in the generic type. For example, the contents of the field in the same row as the generic **Author** field are treated as author names. The column to the right of the generic reference type contains the field names for the selected reference type. This column contains the name of the reference type; the rows below the name contain the field names for that reference type. Both the reference type name and the field names can be edited. There are five fields that are undefined for all reference types - **Custom 2** through **Custom 7** (**Custom 1** is used for a couple of reference types). Note: The **Modify Reference Types** command is enabled only when all style, filter, connection, and reference windows are closed.

Adding new reference types

Three reference types (**Unused 1**, **Unused 2**, and **Unused 3**) are provided specifically for customization. Change the reference type name and label fields as desired. If additional reference types are needed, existing reference types that are not intended to be used (perhaps map or artwork) can be renamed and modified.

Hiding reference types from the drop-down menu in the reference window

Reference types can be prevented from displaying in the drop-down menu in the reference window. To hide the reference types that are not used, open the reference types table and add a period in front of the name of the type to hide. For example, if the Artwork type is never used, change the name of the type to .Artwork.

Resetting EndNote default settings

To reset the default settings for reference types, click the EndNote defaults button on the Reference type preferences window.

Working with Term Lists

Understanding term lists

Term lists are lists of words or phrases that may be used repeatedly within an EndNote library, such as author names and journal titles. EndNote automatically creates lists for author names, keywords, and journal names, however, other term lists may be created as needed (see *Creating new terms lists* below for more information). They can be used to speed manual entry of data (using the auto-completion feature) and can help maintain a controlled vocabulary for keywords and other terms. By default, EndNote automatically updates the term lists in a library so they stay current with the data that has been entered into the references. If a term is entered into a reference, and that term is not in the associated term list already, the term appears in red text to indicate that it is a new term. Term lists are stored within a given library and can only be transferred from one library to another by exporting and importing the list; to edit a term list, the library must be open.


Creating new term lists

To create a new term list, select **Define term lists...** from the **Tools** menu. The terms list window (shown to the right) allows lists to be created, renamed, and deleted. Select the desired delimiters (the punctuation used to separate terms). Once the desired list has been created, click **OK**.
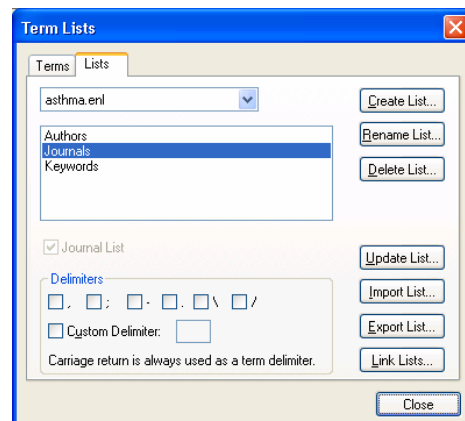
A library can have up to 31 term lists. There is no limit to the number of terms a list can contain, but each term must be less than 253 characters long.

Linking term lists to fields

Returning to the **Lists** menu, select **Link Lists…** The linking fields with term lists window is shown to the left. Each field in the generic reference type is listed in the left-hand column, with term list options in the right hand column. Notice that while some fields are linked to a term list (like **Author**), not every field is (like **Year**). The linking feature is why it is important for a new field to be in the same generic field for all reference types.
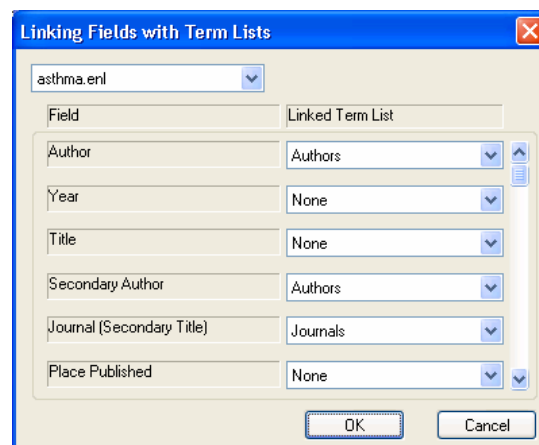
Adding terms

Terms can be added automatically as they are entered by turning on the **Update lists during data entry** preference (see page 4 for information on setting preferences). EndNote also allows manual addition. From the **Tools** menu, open the list of interest (Author, Journal, or Keywords). Select **New Term** on the **Terms** tab and enter the term in the window provided. Clicking on **Save Term** will save the term and keep the window open so that another term can be added. Clicking on **OK** will save the term and close the window.

Updating term lists

Term lists can be manually and selectively updated using the **Update List** option on the **Lists** tab. This option updates a selected list by scanning selected references. First make sure the references to be scanned are showing and highlighted in the reference window. Select the desired term list, then from the **Open Terms List**, under the tools menu, choose **Update List**. Select the field(s) from which to search for new terms, select **Update terms from selected references** if references have been selected, and click on **OK**.

Understanding the journal term list

The journal term list is a special form of term list needing extra clarification. The journal term list is a multi-column list that may contain up to three different abbreviations for a journal title, in addition to the full name. The journal term list is used to perform automatic substitution of abbreviated journal names in formatted bibliographies. (Note: The journal term list replaces the journal abbreviation file used in earlier versions of EndNote.)

EndNote X2 includes a number of files of journal names and abbreviations that can be imported into the journal term list. Those most relevant to Health Science Campus users are medical (*Index Medicus* [NLM] abbreviations) and Bioscience (BIOSIS abbreviations) journals. NOTE: The medical journal list provided with EndNote is out of date. Download a more current copy from here: http://www.library.uq.edu.au/faqs/endnote/journal_terms.html)

To import one or more of the files, open the library with which you want to use the journal list. From the **Tools** menu, open the journal term list. Click on the **Lists** tab and click on **Import list…**. (The file from EndNote is located in the **Terms Lists** folder in the EndNote directory). Select the desired list and click on **Open**. When these are imported, Abbreviation 1 will be the abbreviation with periods (Acad. Med.), and Abbreviation 2 will be the abbreviations without periods (Acad Med).

Setting term list preferences

To set term list preferences, go to the **Preferences** option under the **Edit** menu. Click on the **Term Lists** option. The following preferences are available. (Note: when these features are turned off, they are turned off for all libraries edited on that computer.)

Suggest terms as you type

This is the auto-completion feature. As a term is entered, a suggestion is made (the first matching term in the list). If the term is correct, press the **Enter** or **Tab** key to accept it. If a term is entered that is not in the list, it will be in a red font until the reference is closed or saved. (Note: This option is only available in those fields linked to a term list.)

Update lists when importing or pasting references

When this option is selected, the term lists are automatically updated as you import references (using the **Import** command in the **File** menu), drag-and-drop references, or paste references into your library. If this option is turned off, the term lists can be manually updated using the **Update List** button on the **Open term lists** command in the **Tools** menu.

Update lists during data entry

When this option is selected, the term lists are automatically updated as you type in new reference data. If this option is turned off, the term lists can be manually updated using the **Update List** command in the **Terms** menu.

Working with Import Filters

Understanding filters

A filter is a file that allows EndNote to import references from a variety of electronic sources, such as databases and online catalogs. It contains instructions on how EndNote should take information from the data file to be imported and insert the information into the appropriate fields in the reference window. In other words, the filter makes sure that the article authors end up in the author field, the journal title ends up in the journal title field, etc.

Because each database offered by the various information providers has its own way to organize reference data, there needs to be a different filter for each database/information provider combination. Any of the filters supplied with EndNote can be modified as needed; new filters can also be created or downloaded from *www.endnote.com/support/enfilters.asp*

Using existing filters

There are two parts to using filters: choosing the right export format and choosing the right import filter.

To the right is a record exported from OhioLINK MEDLINE in a format called **Refer**. The codes (**%M**, for example) identify the data fields: **%A** = author, **%T** = title, **%J** = journal title, etc. The appropriate EndNote filter uses these codes to put the authors in the author field, etc.

Once the data file has been successfully exported from the online resource, the next step is to select the proper filter within EndNote. The *Basic Skills* help sheet contains a table that describes export and import procedures for the most commonly used resources at the Mulford Library.

```
%M 20466278
%A Lambert, NC
%A Distler, O
%A Muller-Ladner U
%A Tylee, TS
%A Furst, DE
%A Nelson, JL
%T HLA-DQA1*0501 is associated with diffuse
systemic sclerosis in Caucasian men.
%J ARTHRITIS AND RHEUMATISM
%V 43
%N Sep
%P 2005-10
%D 2000
```

When the data file is imported, an **Import** option must be selected. The EndNote filter manager can be used to indicate which import filters are given as options for import.

From the **Edit** menu, select **Import Filters**, then **Open filter manager….** Using the filter manager (illustrated below), select the filters to be displayed as import options then close the window.

Downloading existing filters

Before creating a new filter, check to make sure the desired filter hasn't already been created. For example, the Library has created filters for use with the OhioLINK databases (request from *MulfordReference @utoledo.edu*), and the EndNote web page (*http://www.endnote.com/support/enfilters.asp*) also has a large list of filters. Save downloaded filters into the filters subdirectory of the EndNote directory.

Creating new filters and editing existing ones

EndNote includes a filter editor that allows the creation of new filters for unsupported databases or customization of existing filters (in the filter manager window, select the filter to edit and click on the **Edit** button). For more information about working with the filter editor, consult the EndNote manual or online help.
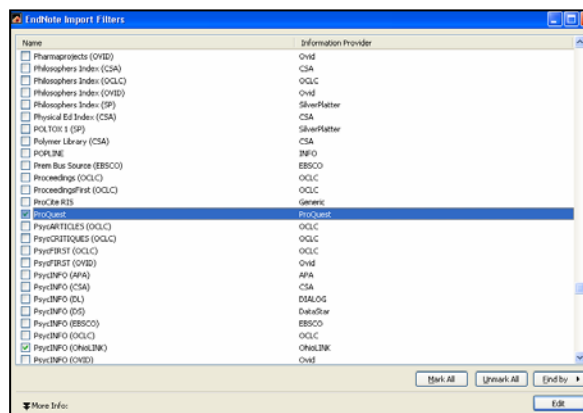
Working with Output Styles

Understanding output styles

An output style (also called a bibliographic style) is a template that tells EndNote how to format the citations in a manuscript or bibliography. Anyone who has written a paper or submitted a manuscript knows about style. References must be cited and formatted a certain way: APA, AMA, NLM, Vancouver, Chicago, etc. EndNote includes over 2,800 output styles that automate what authors used to have to do manually. The *Basic Skills* help sheet discusses using output styles to format bibliographies. This help sheet discusses editing existing styles and creating new ones. Styles can also be downloaded from *http://www.endnote.com/support/enstyles.asp*. Additional information about output styles is available in the EndNote manual and in online help.
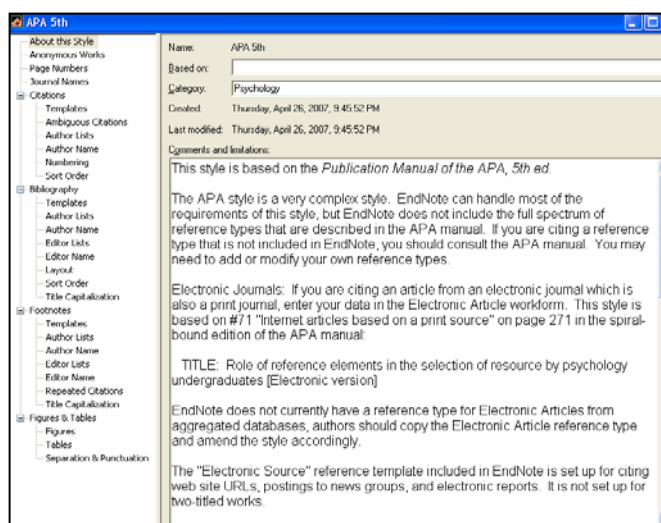
Editing existing styles

Before editing an existing style, make a copy of the style to be modified. Access the style manager window by selecting **Output styles** from the **Edit** menu and choose **Open Style Manager**. From the style manager window, highlight the format to be edited and click on the **Edit** button. This will call up the style window (to the right is the style window for APA format). Select the **Save As** option from the **File** menu. Give the style a new name.

The list on the left side of the window includes all options that can be modified. The first four options (**About**, **Anonymous Works**, **Page Numbers**, and **Journal Names**) are relevant for citations, bibliographies, and footnotes; options relevant to only one of these types are listed under the appropriate type of reference. **Citation** options apply to citations in the body of the text; **Bibliography** refers to the bibliographies that are created by EndNote; **Footnotes** refer to the citations entered into the footnotes of a Word document; under **Figures and Tables, Tables** refer to images inserted from the Image field in the **Chart or Table reference type** and **Figures** refers to images inserted from the **Image field** of any other EndNote reference type.

About this style. In this option, add a description and category for this style.

Anonymous works. In this option, indicate how EndNote should handle references where the author field is blank (not "anonymous").

Page numbers. Indicate how page numbers should be handled (full or abbreviated, or first page only, etc.)

Journal names. Indicate how journal names should be handled (full or abbreviated, which abbreviation, etc. See above for information about the journal term list, which is integral to this preference)

Working with style templates

A style template is a string of fields and codes that tells EndNote how to display the data in a reference. For each reference type in a style, there is a template. To open up a template, click on **Templates** from the **Citations** menu. The template for a journal article in APA format is shown below. Note the field names (Author, Title, Journal, etc.), the traditional punctuation (periods and commas), and the unusual punctuation (characters for special formatting). Templates can be modified by adding or deleting fields, punctuation, spaces, etc. New reference type templates can also be created.

> Author. (Year). Title. *Journal, Volume*|(Issue)|, Pages|.

Here are some rules for working with templates:

Basic dependence: any text or punctuation not separated by an ordinary space is dependent on the adjacent field. This means that the text/punctuation will only display when there is data in the field. In the example above, the parentheses around the issue number will only be displayed when there is an issue number to display. If two fields are adjacent to text or punctuation, the preceding field takes precedence.

Spaces: The first space following a field is dependent on that field. Additional spaces are independent.

Independent text: Independent text (text not from a field) always appears in the bibliography.

Font formatting: To format a field, such as journal or book titles, simply highlight the field and select **Style** from the **Text** menu. Options are underline, italics, boldface.

Special characters: All of these special characters can be added by using the **Insert Field** button.

> Non-breaking space (gray diamond) – The EndNote manual refers to the non-breaking space as "bibliographic formatting glue," meaning that it joins two or more items together so they act as a single unit. Any text or punctuation "glued" to a field will not be displayed if the field is empty. In a formatted bibliography, it will display as an ordinary space.

> Forced separation (vertical bar, pipe, |) – This is used to break dependence. In the example above, the forced separation after **Pages** will cause the period to be displayed whether or not there are pages in the reference.

> Field names as independent text (accent grave, ` ) – This is used around independent text that could be misinterpreted as a field label, such as `Editor`.

> Singular/plural separator (caret, ^) – This can be used to specify singular and plural forms of independent text, such as **Ed.^Eds**.

Creating an annotated bibliography

Nearly all of EndNote's output styles create bibliographies with citations only, without including abstracts or annotations; the Annotated option is the exception. It is possible to create an annotated bibliography for any output style.

First, follow the steps above to create a copy of the style to annotate. In the **Bibliography > Layout** option, notice there is information for **Start each reference with** and **End each reference with**. Information telling EndNote to add an annotation will be added in the field labeled **End each reference with**. In the screen shot on the previous page, information for adding the abstracts has been entered. The general format is as follows: Begin with clicking on the **Insert Field** button and selecting **End of paragraph**; this starts the annotation
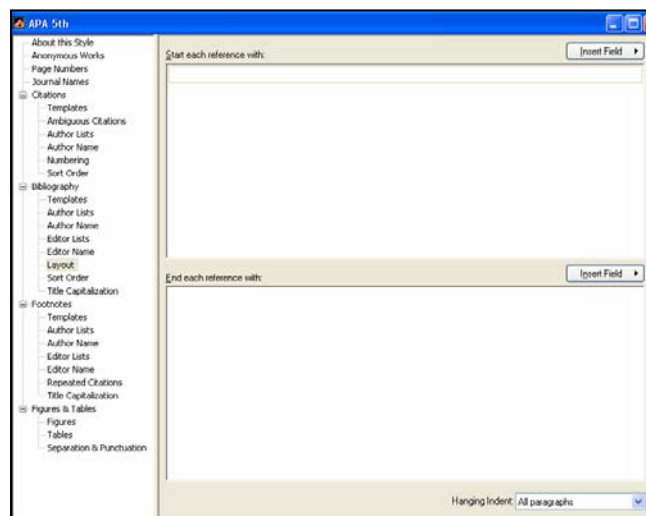
on the following line. Add a **Link adjacent text**, then a **Tab** (if the first line of the annotation should be indented), then another **Link adjacent text**, then the desired field. In this illustration, the **Abstract** field was chosen, but the **Notes** field could also have been added; select whichever field in which the annotations are stored. Select a hanging indent option as desired.

For more information about working with output styles, see the EndNote manual or online help.

Creating new styles

To create a new style, select **Output styles** from the **Edit** menu, the select **New style…**. Use the information above to set up the features of the new style.

Modifying In-Text Citations
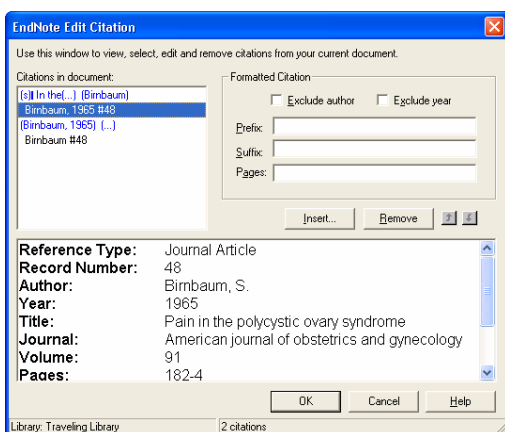
Not all in-text citations follow the exact format of an output style. For example, in APA format, the typical in-text citation looks like this: (Smith, 2003). Sometimes text needs to be added or deleted from this standard format. Do not make the edits to the citation directly because these changes will be lost if the document is reformatted.

In Word, select **Tools** menu > **EndNote X2** > **Edit Citation(s)…** In the dialog box (illustrated to the left), select the citation that you want to modify, and make the changes in the dialog box. (Please note that when using Microsoft Vista, you will see an EndNote tab menu, not a menu under **Tools**).

Exclude author	Omits the author(s) name from the formatted citation
Exclude year	Omits the date from the formatted citation
Prefix	Enter words that should be included before the citation, such as see also. Include relevant space, such as the one after the prefix.
Suffix	Enter words that should be added after the citation.
Pages	Usually used with direct quotations. Enter the page numbers that you are citing. To see these, the output style must be modified to include cited pages in the citation template (see above).
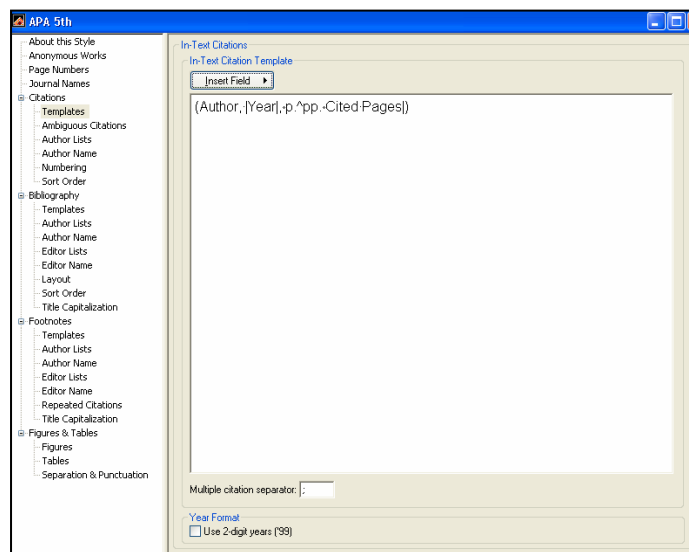
You can also add or remove references from a multi-reference citation, such as (Jones, 1999; Smith, 2003), using the **Insert…** and **Remove…** buttons. The up and down arrows can be used to change the order of display.

Working with Manuscript Templates for MS Word

When EndNote is installed on a computer, it also installs a set of predefined Word templates for a variety of journals to speed manuscript preparation. From the **Tools** menu in EndNote, select **Manuscript Templates…**. Browse the Templates subdirectory in the EndNote directory to find the desired template. This will launch a wizard that prompts for pieces of information (manuscript title, page headers, authors, etc.) and allows you to indicate which sections to include in the paper. The resulting Word document has prompts for where to include particular parts of the manuscript. For more information, see the EndNote manual or online help.

Working with Connection Files

Connection files allow the use of the EndNote interface to search remote databases. Searching databases through EndNote is *not recommended* because it relies only upon text word searching. The power of PubMed and CINAHL lies in their use of controlled vocabulary and features like the thesaurus, focusing, expanding, subheadings, and limits; searching with EndNote does not take advantage of these features. For more information, consult the EndNote manual or online help.

Customizing Preferences

To customize EndNote, from the **Edit** menu, select **Preferences**. The following areas can be modified:

Libraries Specify which library/libraries to open automatically when EndNote is launched

Display fonts Customize the fonts used in EndNote: library display font and general display font

Reference types Customize reference types; see section above for more information on customizing reference types

Temporary citations Modify the default temporary citation format by changing delimiters, number marker, prefix marker, and note marker

Sorting Identify the words to be ignored in author and title sorting

Change case Identify the words for which case should not be modified when EndNote changes the case of titles or authors (such as USA or DNA)

Formatting Customize formatting options: confirming style before formatting; omitting author/year from formatted citations if they are deleted from the temporary citation; merging duplicates in the bibliography

Display fields Select the fields to display in the library window

Duplicates Customize how EndNote identifies duplicates (which fields to compare and the criteria used in comparison)

Online Select browser and connection logs

Folder locations Set the default location of folders for styles, filters, and connections

Term lists Customize term lists; see section above for more information on customizing term lists

Spell check Customize spell-check options, including selecting a primary dictionary. [Note: EndNote has an option for American English Medical.]

URLs & Links Starts your default web browser (this is whatever your system identifies as the default browser, such as Explorer or FireFox) and will display in your browser's window the links related to the record you have open

EndNote Web Set your username and password for EndNote Web

In addition to the preferences for the EndNote program, preferences can also be set for Cite While You Write. From within Word, select **Cite While You Write Preferences…** from the ENX2 submenu from the **Tools** menu/**Tab**.

Open/Close Indicate whether EndNote should be automatically launched when Word is launched and/or closed when Word is closed

Return to document Indicate whether Word should be the active window once citations have been inserted

Instant Formatting Activate or deactivate this feature

Keyboard Shortcuts Designate keyboard shortcuts for add-in commands

Figures and Tables Determines the location of figures and tables in the word document as well as their respective labels or captions

Application Select the Cite While You Write application to use: EndNote or EndNote Web.