

# USING ENDNOTE X2 : BASIC 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 X2: Advanced Skills*, is available from the Library (<http://www.utoledo.edu/library/mulford/pdf/advanx2.pdf>) and provides information on personalizing EndNote. For additional assistance, contact Mulford Reference Assistance (419-383-4218, [MulfordReference@utoledo.edu](mailto:MulfordReference@utoledo.edu), or <http://www.utoledo.edu/library/mulford/resources.html>), consult EndNote's online help, (<http://www.endnote.com/support/helpdocs/EndNoteX2WinManual.pdf>)

**Requirements to run ENX2:** XP (with Service Pack 2), Vista ; Pentium 450-MHz minimum, 180MB hard disk space available, and 256 MB RAM. Cite While You Write is compatible with Microsoft Word 2007, 2003. Handheld requirements at <http://www.endnote.com/ENWin.asp>.

Health Science Campus faculty, staff, and students can obtain a **copy of EndNote for home use**. For details, go to the Information Systems web page: [http://www.is.mco.edu/endnote\\_home.htm](http://www.is.mco.edu/endnote_home.htm). Main Campus faculty, staff, and students should contact Information Technology.

## What's New with ENX2?

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This list is a selection of new features; see the entire list in online help.

- Use **Smart Groups** to view and manage subsets of references in your library. Set up a custom search strategy to automatically add references to a Smart Group.
- Look for the full text of a referenced work, and attach a file (typically a PDF file) to your EndNote reference. (Please note that this feature does not find all files available freely or through university subscriptions due to technicalities)
- References now include automatic date stamp information noting when added and when last updated.

For more information on compatibility of ENX2 with earlier versions of EN, see page 9.

## EndNote Terminology

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**Library** – a collection of references ; there is no limit to the number of references you can create in an EndNote library. It is recommended that the number not exceed 100,000 to maintain efficient performance managing the database.

**Reference** – a bibliographic citation

**Reference type** – the type of material of a citation; some of the reference types in EndNote are journal article, book, book section, conference proceedings, electronic source, etc.

**Field** – components of a reference, such as author, title, year, and journal title; at most, there can be 52 fields per reference

**Import filter** – a file that tells EndNote how to import references from online databases and catalogs

**Output style** – a file that tells EndNote how to format citations; styles are available for individual journals or for general styles (Vancouver, APA, AMA, NLM, Chicago, etc.)

**Term list** – a list of terms associated with a given field that assists with automated data entry



## Working with Display Modes

New to EndNote2 is the inclusion of display modes (the three icons in the upper left corner; mousing over them will reveal their titles). Select a display before working with EndNote.

- **Integrated Library & Online Search Mode**- All groups and menu commands are available. This is the default when creating a library. When you perform an online search, the found references are downloaded directly into the currently open library.
- **Local Library Mode** – Displays all groups and menu commands except Online Groups. It keeps you from inadvertently searching an online database and downloading references into your currently open library.
- **Online Search Mode** - Select Online Search Mode if you do not want to automatically download found references directly into your open library. You may prefer to peruse the downloaded references and then copy only specific references into your permanent EndNote library.

For further information, see online help.

## Working with Libraries

### Creating a new library

From the **File** menu, select **New....** Give the new library a name, making sure to retain the *.enl* extension. Click on **Save**.

**First thing after creating a new library**, import the updated journals term lists, available from the University of Queensland library: [http://www.library.uq.edu.au/endnote/journal\\_terms.html](http://www.library.uq.edu.au/endnote/journal_terms.html). See the *Advanced Skills* help sheet for information on working with term lists.

An ENX2 library (where references are stored) has an associated directory called *nameoflibrary.data* (where images and other necessary files are stored). When a new library is created, supporting directories are also created.

Reference information is stored in the library file; the supporting directories are:

*nameoflibrary.data* is created in the same directory as the library; images, PDF files, information about what references are in what groups, etc. are stored here.

*Personal* is used when you have new or customized filters, styles, etc.

*Shared* can be used to share information with people who are using the *same computer*.

Specific directory locations depend upon the operating system; see online help for more details.

### Opening an existing library

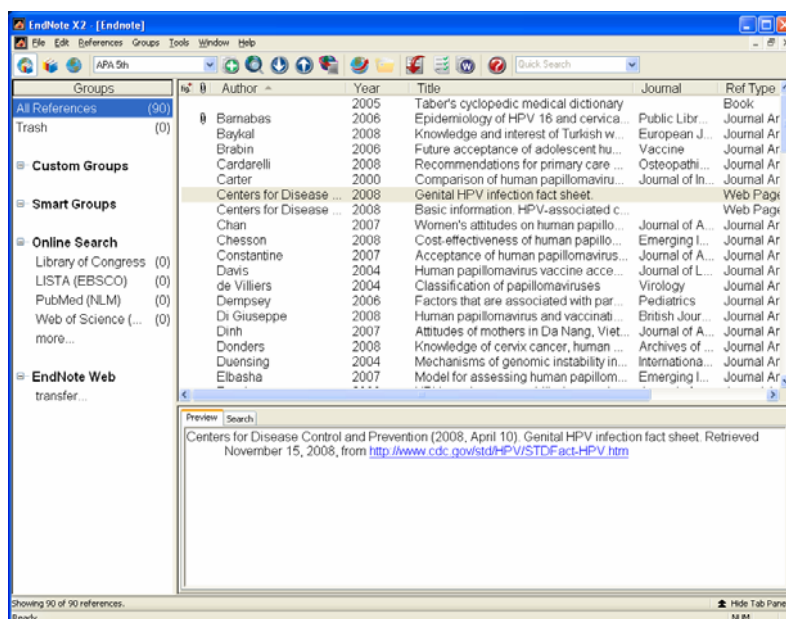
From the **File** menu, select **Open...** then **Open library....** Note that recently used libraries are listed below **Open library...** for easy access.

### Working in the library window

In the Library window, each reference is displayed on a line using several pieces of information: author, year, title, journal, reference type, and URL (these can be customized; see below).

A paperclip icon beside a reference indicates that there is an attached file, like a PDF; **fig+** indicates that there is an attached graphic or file in the figure field.

**Sorting** References can be sorted by one of these fields by clicking on the field label near the top of the window. Click once for an ascending sort; click a second time for a descending sort. By default, references are sorted ascending by author.



**Preview** At the bottom of the Library window, there is an option for **Show Tab Pane** which shows a single citation in the current output style. References cannot be edited in the preview view; see below for information on editing references. To hide the preview, click on **Hide Tab Pane**.

### *Customizing the library window*

The Library window can be customized using the **Preferences** feature found in the **Edit** menu.

**Auto Open** To have EndNote automatically open one or more libraries when the application is launched, click on **Libraries** and add desired libraries

**Font** Click on **Display Fonts** to change the font used in the Library window

**Fields** Click on **Display Fields** to change the fields displayed in the Library window. To display multiple author names in your library window, after clicking **Display Fields**, select the box next to **Display all Authors in the Author Field**

Click on **OK** when the desired modifications have been made.

### *Hints for working with libraries*

- Though multiple libraries can be open at one time, maintaining a single library for all references is recommended.
- Back up libraries regularly using the **Save a copy...** option in the **File** menu.

## **Working with References**

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Each EndNote reference contains the information needed to cite the reference in a bibliography plus extra fields such as abstracts, notes, keywords, URLs, etc. References can be added manually or imported from a database (see below).

The **References** menu contains the options for manipulating references, such as creating a new reference, editing or deleting an existing reference, or showing and hiding selected records.

### *Working in the reference window*

The reference window is where references are manually added and edited. At the top of the window, there is a drop-down menu of reference types. **ENX2** includes 45 pre-defined reference types, one generic type, and three unused reference types. (For information on customizing reference types, see the *Advanced Skills* help sheet.)

When a reference type is selected, the field labels in the reference window may change to be more appropriate for the type. For example, the book reference type will have a field for publisher, whereas the journal article reference type would not have a publisher field. To hide reference fields that you are not using, click on the **Hide Empty Fields** icon in the top right corner of the screen.

### *Customizing the reference window*

The Reference window can be customized using the **Preferences** feature found in the **Edit** menu.

**Font** Click on **Display Fonts** to change the font used for general display

**Ref Types** Click on **Reference Types** to set the default reference type

The reference types that are listed in the dropdown list in the reference window can be modified so that they do not appear in the list. For information on how to do this, see the *Advanced Skills* help sheet.

### *Customizing references*

Individual references can be customized by using items in the toolbar for fonts, font size, text styles (as bold), superscripts, and subscripts. The **Open Link** and **Open File** icons provide for quick access to any links and files within the reference. The **Attach figure** icon allows one to include a link to a figure stored on one's computer or network.

## **Getting References into EndNote**

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### *Manually*

From the **References** menu, select **New reference. . .** This calls up a window in which citation data can be entered by hand. Select the appropriate reference type from the drop-down menu, and enter data into fields as described below. Not all fields have to be used. Use the **Enter** key to begin a new line in the same field; use the **Tab** key to jump to the next field.

<b>Names</b>	<p>Author and editor names must be listed <b>one name per line</b>. Using the format <i>lastname, firstname</i> is recommended. Use periods after initials, such as <i>Smith, A. A.</i>, or a space between initials, <i>Smith, A A</i></p> <p>By default, the author field is set to work with the author term list. Subsequent occurrences of a name will automatically be filled in. To accept a suggested name, press the <b>Enter</b> or <b>Tab</b> key. If a name hasn't already been used in the library, it will be in red text. To disable this feature, go to the <b>Preferences</b> option in the <b>Edit</b> menu.</p> <p>For anonymous works, leave the author field blank.</p> <p>For works with many authors, include as many authors as known. If all authors are not known, enter <i>et al.</i> or <i>and others</i> as the last author name, followed by a comma.</p> <p>For corporate authors (such as the U. S. Centers for Disease Control), enter the name followed by a comma. (This prevents EndNote from inverting the name.) For multi-layered corporate authors, like U. S. Centers for Disease Control, National Center for Health Statistics, enter the name like this: U. S. Centers for Disease Control,,National Center for Health Statistics (that's two commas between the two levels, none at the end). For three- or more level names, use two commas between the first two levels, one between other levels, none at the end.</p> <p>For complex author names, enter names in this format: <i>de Gaulle, Charles</i> and <i>Smith, Alfred, Jr.</i></p>
<b>Year</b>	Enter the four-digit year (such as <i>1987</i> ) or <i>in press</i> or <i>in preparation</i> , as appropriate.
<b>Titles</b>	Enter titles without a period or any other punctuation at the end. For long titles, do not use the <b>Enter</b> key; just allow the title to wrap around to the next line. It is best to enter the title capitalized as it will appear in the bibliography, as output styles cannot handle more than one type of title capitalization per reference (such as an article title and a journal title).
<b>Journal</b>	Enter the full journal title. By default, the journal title field is set to work with the journal term list. Subsequent occurrences of a title will automatically be filled in. To accept a suggested journal title, press the <b>Tab</b> key. If desired, enter the journal title abbreviation in the <b>Alternate Journal</b> field. See the <i>Using EndNote: Advanced Skills</i> for information about the journals term list and importing the NLM abbreviations.
<b>Pages</b>	Page ranges can be entered in full ( <i>342-346</i> ) or condensed ( <i>342-6</i> ) format. Do not use commas in page numbers in the thousands.
<b>Edition</b>	Enter <i>1st</i> , <i>2nd</i> , etc. as appropriate; do not include <i>edition</i> or <i>ed</i> . When EndNote formats a bibliography, it does not reformat the information in this field.
<b>Date</b>	Enter dates as appropriate. When EndNote formats a bibliography, it does not reformat the information in this field.
<b>ID Numbers</b>	ENX2 has a number of fields for identifying numbers. The <b>Electronic Resource Number</b> is for the DOI (digital object identifier) for online articles. The <b>Accession Number</b> is for numbers identifying references in a database, like the PMID number in MEDLINE and PubMed.
<b>Keywords</b>	Enter keywords associated with the reference, such as subject descriptors, class name, project title, etc. By default, the Keyword field is set to work with the keyword term list. Subsequent occurrences of a keyword will be automatically filled in. To accept a suggested keyword, press the <b>Enter</b> or <b>Tab</b> key.
<b>Notes</b>	Enter personal notes about the work.
<b>Abstract</b>	Enter a brief description of the work.
<b>URL</b>	Enter the uniform resource locator (Web address). With a URL in this field, use the <b>Open Link</b> command from the References menu to launch the browser and open that site. For this to work properly, the URL, beginning with <i>http://</i> , must be the only information in this field. This can also be used to link to files on a local computer.

For information on the use of other fields, see online help.

#### Importing from databases

This is a quicker and easier method of getting citations into EndNote rather than entering references manually. Depending on the electronic resource you use, there will be different steps to follow in export and import your references. To export, select the desired references and follow the instructions in the table below. To import into EndNote, go to the **File** menu, then select **Import...** then follow the instructions listed in the table. Note: Import filters must be saved in the *c:\program files\endnotex2\filters*.

Resource	Export Instructions	Import Instructions
University Libraries Catalog/OhioLINK Catalog	<ul style="list-style-type: none"> <li>To mark records in University Libraries Catalog or OhioLINK from the list of titles, click in the boxes to the left of the titles, then click on the button <b>Save Marked Records</b> at the top or bottom of the page. When looking at an individual record, click on the <b>Save Records</b> icon at the top or bottom of the page.</li> <li>Click on the <b>View Saved</b> icon at the top or bottom of the screen.</li> <li>For <b>Format of List</b>, select <b>End-Note/Refworks</b>.</li> <li>For the <b>Send List to</b> option, select <b>Local Disk</b>.</li> <li>Click on the <b>Submit</b> button.</li> <li>If an <b>Unknown File Type</b> box pops up, click on the <b>Save file . . .</b> button.</li> <li>Save it as a text file – give it a new name with a .txt extension, such as <i>filename.txt</i></li> </ul>	<ul style="list-style-type: none"> <li>Select <b>Import</b> under <b>File</b> (or use <b>Import</b> icon in Toolbar)</li> <li>For <b>Import Data File</b>, select the file in which the citations were saved.</li> <li>For the <b>Import Option</b>, select <b>EndNote Import</b>.</li> <li>For the <b>Duplicates Option</b>, select the desired option.</li> <li>For <b>Text Translation</b>, leave the default option (No translation).</li> <li>Click on <b>Import</b>.</li> </ul> <p>NOTE: Imports from catalogs such as the University Libraries Catalog and the OhioLINK Catalog often contain added information and punctuation that needs to be removed. Open the imported references and edit as needed.</p>
OhioLINK Databases <i>PsycINFO, Historical PsycINFO, Biological Abstracts, etc.</i>	<ul style="list-style-type: none"> <li>To mark records in the OhioLINK databases from the list of titles, just click in the <b>Store</b> box under the titles. When looking at an individual record, click in the <b>Store This Record</b> box above the article citation.</li> <li>Click on <b>Stored Records</b> at the top of the page.</li> <li>Click on <b>Export Records</b>.</li> <li>Make sure that <b>Refer format</b> is selected.</li> <li>It is recommended that <b>Download for Manual Importing</b> is selected. The automatic import can result in a messy import that needs to be cleaned up in EndNote.</li> <li>Click <b>Export Now</b></li> <li>Save it as a text file – give it a new name with a .txt extension <i>filename.txt</i></li> </ul>	<p>Prior to importing the records, request the OhioLINK filters from the Mulford Reference Assistance Save these filters in the Filters subdirectory of the EndNote directory.</p> <ul style="list-style-type: none"> <li>Select <b>Import</b> under <b>File</b></li> <li>For <b>Import Data File</b>, select the file in which the citations were saved.</li> <li>For the <b>Import Option</b>, select the relevant OhioLINK database filter (you may have to select <b>Other Filters</b> to find the right one); for databases without a specific filter, select the EndNote Import option.</li> <li>For the <b>Duplicates Option</b>, select the appropriate option.</li> <li>For <b>Text Translation</b>, leave the default option (No translation).</li> <li>Click on <b>Import</b>.</li> </ul> <p>NOTE: Imports from the OhioLINK databases may need to be cleaned up within EndNote. Open the imported references and edit as needed.</p>
PubMed	<ul style="list-style-type: none"> <li>Select desired citation (check box to the left of citations)</li> <li>Store desired records on the clipboard (change <b>Send to</b> to <b>Clipboard</b>) then view the clipboard by clicking on its tab. Select <b>MEDLINE</b> format from the <b>Display</b> menu, then change <b>Send to</b> to <b>File</b>. Save file.</li> </ul>	<ul style="list-style-type: none"> <li>Select <b>Import</b> under <b>File</b></li> <li>For <b>Import Data File</b>, select the file in which the citations were saved.</li> <li>For the <b>Import Option</b>, select <b>Other Filters</b> .and use the <i>PubMed (NLM)</i> filter.</li> <li>For the <b>Duplicates Option</b>, select the appropriate option; click on <b>Import</b>.</li> </ul>
EBSCOhost Databases <i>CINAHL, Academic Search Complete, Health Source, AltHealth-Watch, Psychology &amp; Behavioral Sciences Collection, etc.</i>	<ul style="list-style-type: none"> <li>To mark records in an EBSCOhost database, click on the Add (or Add to Folder) icon.</li> <li>Click on Folder has Items link at the top of the page.</li> <li>Select All</li> <li>Click on Export..</li> <li>Choose Direct Export to EndNote, ProCite, or Reference Manager.</li> <li>Click on Save.</li> </ul>	<p>Direct Import</p> <ul style="list-style-type: none"> <li>Select the library into which the references are to be imported. Import is automatic.</li> </ul>

Resource	Export Instructions	Import Instructions
ISI Citation Indexes <i>Science Citation Index, Social Science Citation Index, Arts &amp; Humanities Citation Index</i>	<ul style="list-style-type: none"> <li>To mark records in ISI from the list of titles, just click in the boxes to the left of the titles, then click on the button <b>Add to marked list</b> at the top or bottom of the page. When looking at an individual record, click on the <b>Add to marked list</b> at the top or bottom of the page.</li> <li>Click on <b>Marked List</b> at the top of the page.</li> <li>Click on <b>View Marked Records</b></li> <li>There is no need to select additional items in Step one. All necessary information will be exported.</li> <li>In Step Two, go to the drop down menu to the left of <b>Save to File</b>.</li> <li>Select <b>Plain Text</b>.</li> <li>If prompted to save, save it as a text file (.txt); if an EndNote window pops up, see import instructions to the right.</li> </ul>	<i>EndNote Window Pop-up</i> <ul style="list-style-type: none"> <li>Select the library into which the references are to be imported. Import is automatic.</li> </ul> <i>Saved File</i> <ul style="list-style-type: none"> <li>Select <b>Import</b> under <b>File</b></li> <li>For <b>Import Data File</b>, select the file in which the citations were saved.</li> <li>For the <b>Import Option</b>, select <b>Other Filters</b> and use the <i>Web of Science(TS)</i> filter.</li> <li>For the <b>Duplicates Option</b>, select the appropriate option; click on <b>Import</b>.</li> </ul>
ProQuest <i>Nursing Journals</i>	<ul style="list-style-type: none"> <li>To mark records in a ProQuest database, click in the box to the left of the reference.</li> <li>At the top of the results list, click on <b>My Research (x) marked items</b>.</li> <li>Select Download in a Format Compatible... (Do NOT select Export Directly. The resulting import will be very messy.)</li> <li>When the results are displayed, select <b>Save As...</b> from the <b>File</b> menu. Rename the file and select the save as type <b>Text File (*.txt)</b>.</li> </ul>	Prior to importing the records, contact Mulford Reference Assistance and ask for the ProQuest filter. <ul style="list-style-type: none"> <li>Select <b>Import</b> under <b>File</b></li> <li>For <b>Import Data File</b>, select the file in which the citations were saved.</li> <li>For the <b>Import Option</b>, select <b>Other Filters</b> and use the <i>ProQuest</i> filter.</li> <li>For the <b>Duplicates Option</b>, select the appropriate option; click on <b>Import</b>.</li> </ul>
National Library of Medicine Gateway	<ul style="list-style-type: none"> <li>Select desired records and click on <b>Download</b> at the top or bottom of the page.</li> <li>For <b>Destination</b>, select <b>Save to File</b>.</li> <li>For <b>Download as</b>, select <b>Text</b>.</li> <li>For <b>Format</b>, select <b>Labelled</b></li> <li>For <b>Level of Detail</b>, select <b>Complete</b>.</li> <li>Click on <b>Go</b>.</li> <li>When the results are displayed, select <b>Save As...</b> from the <b>File</b> menu. Rename the file and select the save as type <b>Text File (*.txt)</b>.</li> </ul>	Prior to importing the records, download the NLM Gateway filter from the EndNote web site ( <a href="http://endnote.com/support/enfilters.asp">http://endnote.com/support/enfilters.asp</a> ). <ul style="list-style-type: none"> <li>Select <b>Import</b> under <b>File</b></li> <li>For <b>Import Data File</b>, select the file in which the citations were saved.</li> <li>For the <b>Import Option</b>, select <b>Other Filters</b> and use the <i>Gateway (NLM)</i> filter.</li> <li>For the <b>Duplicates Option</b>, select the appropriate option; click on <b>Import</b>.</li> </ul>

## Organizing References

Because it is recommended that you maintain a single library for all of your references, you need a way to note which references are for which projects/grants/classes, so you can locate them. There are three ways to manage your references.

**The first method** is to add a unique code or keyword to all references for a given project. This can be done automatically. When records have been imported into EndNote, only the imported records will be visible in the library window. (The other references are hidden.)

1. In the **References** menu, select **Change and Move Fields...**
2. On the **Change Fields** tab, select the field to which you want to add the code (such as the Keyword or Label field)
3. Choose the desired change and spacing option
4. Enter the code or text to add in the box to the right
5. Click on **Okay**, and then read the alert box. If it is indicating what you want it to do, click on **Okay**

This can be done for other references as well. Using commands in the **References** menu, hide the references that should **not** get the keyword/code. Then follow the steps listed above.

***A second method*** is using the **Custom Groups** feature. **Custom Groups** allows you to organize your references by different topics to help you better keep track of your references. With groups, your references will be included in your main library as well as the group you assign them to. ENX2 provides 2 default groups, however, you are able to generate up to 500 custom and smart groups.

There are several ways to create a new Custom Group :

- From the **References** menu, select **Groups** and then **Create New Group**.
- Right click on **Custom Groups** in the Groups column . Click on **Create Group**.
- Select references from your library, go to the **Groups** menu, choose **Add References to New Group**, and enter a name for the group.

To add references to a Customs Group :

1. Select the references from your library which you want to add to the group. You have several options for selecting references: click on an individual reference (to choose multiple references, hold down the **CTRL** key and select individual references), from the Edit menu click **Select All**, or hold down the **Shift** key and select a range of references.
2. To add your selected references to a group:
  - From your library window, click on your desired reference and drag it to the group you would like to include it in
  - Select your desired reference and from the **Groups** menu and select **Add References to**. Next, select either a group you already made or **Custom Group**.
  - Right click on your desired reference and from the menu given select **Add References to**; then select either a group you already made or **Custom Group**.

***A third method*** is using the **Smart Groups** feature. **Smart groups** are built using search strategies (finding authors, abstract words, note field words, etc). **Smart groups** are automatically updated with any references matching the search strategies as one adds and edits references.

There are several ways to create a new Smart Group:

1. Creating a Smart Group
  - From the **Groups** menu, select **Create Smart Group**. A search dialog appears.
  - Enter your search strategy and click **Create** to create a "New Smart Group" .
  - From the **Groups** menu, choose **Rename Group**, and type a descriptive name for the group.
2. Creating a Smart Group from an Existing Search Strategy
  - Click on **All References** to display all references in the library
  - In the **Tabs** pane, click the **Search** tab.
  - Click **Options** and select **Load Search**.
  - Locate, select, and open the search strategy to load it into the **Search** tab.
  - Click **Options** and select **Convert to Smart Group**.

Keep in mind that a reference can only go into a group once; however and one reference may be in multiple groups Deleting a reference from a group will not delete it from your entire library; however, deleting a reference from your main library will delete it from all of the groups it is in.

## Searching EndNote Libraries

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To search an EndNote library for a specific reference or group of references, open the desired library and from the **Tools** menu, select **Search Library....** The following options are available from the search window.

**Search Item** This consists of three parts: the field menu, the comparison operator, and the search term field. Using the drop-down field menu, select the field in which to search. Select the desired comparison operation (**contains**, **is**, **is less than**, **is less than or equal to**, **is greater than**, **is greater than or equal to**, **field begins with**, **field ends with**, and **word begins with**). Enter the search term in the search term field.

**Search Set** The drop-down menu near the bottom of the window determines what will be searched and displayed. **Search whole library** will search the whole library and will display the results of the search; this is the default. **Omit from Showing References** will hide the results of the search from the references that are showing.

For more complex searches, enter more than one search item and use Boolean operators (i.e. AND, OR) between them. The EndNote Manual and online help contain detailed information about searching EndNote libraries.

## Getting Citations out of EndNote and into a Manuscript

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Before citing references in a manuscript:

- Select the desired output style in EN: Select the **Output styles...** option on the **Edit** menu. If the desired style is not available in the list, click on **Open Style Manager...** and select the output styles to be included in the **Output styles** submenu by clicking in the box to left of the style name. (Use the **Style Info/Preview** feature to find information about the style and to see samples of citations formatted in the highlighted style. For information on creating new styles and editing existing ones, see the *Advanced Skills* help sheet, online help, or the EndNote manual.)
- Close the **EndNote Styles** window, then return to the **Output styles...** option on the **Edit** menu and select the desired style. (It can also be selected from drop-down menu in the main toolbar.)
- When ready to cite a reference in a manuscript, go to the ENX2 submenu in Word (within the **Tools** menu; please note, when using Microsoft Vista you will see an EndNote tab, not a menu in **Tools**) and select **Go to EndNote**. Once EndNote is the active window, open the database of interest (if it is not already open).
- Within the database, select the reference(s) to be cited and return to Word. (You can also use the **Find Citation(s)** option in the ENX2 submenu/tab).
- In the Word document, place the cursor where the reference(s) should be inserted, then select **Insert Selected Citation(s)** from the **Tools** menu/**Tab**.

To review, the general process of inserting citations is (1) In Word, **Go to EndNote**, (2) in EndNote, select the citation(s) to insert, (3) return to Word and **Insert Citation(s)**. A temporary, unformatted citation will be inserted in the manuscript. If Cite While You Write is turned on, you may not see this temporary citation. Cite While You Write (CWYW) automatically scans the manuscript for temporary citations and formats the in-text citations and reference lists according to the active output style while you are working on the manuscript. With older computers, instant formatting can be a slow process; it can be turned off by selecting **Cite While You Write Preferences** from the ENX2 submenu/tab.

For more information about the citing references with EndNote, see the section below on using the Microsoft Word add-ins.

## Using the Microsoft Word – EndNote Add-Ins

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EndNote can be used to cite and format references in a manuscript. To assist in this process, ENX2 installs a submenu commands in the **Tools** menu/**Tab** of Microsoft Word.

<b>Find Citation(s)</b>	Opens a window where you can search for the reference of interest, and insert it into the manuscript
<b>Go to EndNote</b>	Launches EndNote or, if EndNote is already open, brings EndNote to the front of the desktop so that one or more references can be highlighted
<b>Format Bibliography</b>	Formats or reformats the references according to the selected output style. The formatting process replaces the temporary citations with formatted citations and builds a formatted reference list at the end of the manuscript.
<b>Insert Selected Citation(s)</b>	Inserts selected references as a temporary citation at the location of the cursor in the Word document
<b>Edit Citations</b>	Allows editing of references, such as removing author name or year, or adding page numbers
<b>Insert Note</b>	Allows adding a note to the document
<b>Edit Library Reference(s)</b>	Allows editing of EndNote references from within Word (such as hiding the author name or adding page numbers); see manual or online help for details.
<b>Unformat Citation(s)</b>	Unformats a citation before editing it or unformats the entire manuscript
<b>Remove Field Codes</b>	Used to remove field codes from a manuscript before sharing it. See page 8.

<b>Export Traveling Lib.</b>	Creates a library from the references in a paper
<b>Find Figure(s)</b>	Allows insertion of a figure included in an EndNote library
<b>Generate Fig. List</b>	Updates in-text figure citations and generates a list of figures
<b>CWYW Preferences</b>	Set preferences for the Cite While You Write feature, including turning off instant formatting

## Getting Citations out of EndNote and into an Independent Bibliography

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EndNote can also be used to create a bibliography independent of a paper, such as an annotated bibliography. Online help (<http://www.endnote.com/support/helpdocs/EndNoteX2WinManual.pdf>) has detailed instructions for creating a subject bibliography.

### Selecting output style

First, select the desired style of the independent bibliography as described above for getting citations out of EndNote and into a manuscript.

### Including notes or abstracts

Most styles do not include notes and abstracts. To include these, see the *Advanced Skills* help sheet, online help, or the EndNote manual for information on creating new styles and editing existing ones.

### Copy formatted references

Select the desired reference(s) from the EndNote library. (Hold down the control key to select multiple references.) From the **Edit** menu, select **Copy formatted**. Open the desired Word document and paste the formatted references using **Ctrl-V** or by selecting **Paste** from the **Edit** menu.

### Exporting references

Note: Only the references that are selected or showing in the active window will be exported. (In the References menu, there are options to select which items to show in the current window: **Search**, **Show all**, **Show selected**, and **Hide selected**.) From the **File** menu, select **Export....** Give the file a name and select the desired file type (see below), and click on **Save**.

- Text** This format will only result in text and punctuation. Formatting such as underlining and italics will be lost. This format can be opened by any text editor.
- RTF** This format (Rich Text Format) will retain font and formatting options. This format can be opened by all word processors.
- HTML** This format (HyperText Markup Language) is useful for posting reference lists on a Web page.
- XML** This format exports in a proprietary EndNote XML format.

### Printing references

The **Print** option from the **File** menu is a quick-and-dirty way to get the references on paper. As with exporting references, only the references that are showing in the active window will be exported. (In the **References** menu, there are options to adjust which items are showing in the current window: **Search**, **Show all**, **Show selected**, and **Hide selected**.) From the **File** menu, select the desired output style (as described above), then print.

## Formatting Citations in a Manuscript

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If Cite While You Write instant formatting is disabled, the references will need to be formatted in the following way.

### Selecting output style

Select the desired output style as described above.

### Formatting references

Return to Word and select **Format Bibliography** from the ENX2 submenu of Word's **Tools** menu/**Tab**. In the pop-up window, select the document to format (by default it is the current document) and the style. After selecting the desired format, click on the **Format** button. Note that EndNote reformats the references in the paper as well as adding the reference list at the end of the paper. Warning: Carefully review the formatted bibliography for errors. If there are any errors, the best way to correct them is to make the changes in EndNote. In a pinch, however, corrections can also be made in the reference list itself.

### Reformatting references

To reformat the reference list, go back to **Format Bibliography** and select another style.

#### *Unformatting references*

To unformat the reference list, select **Unformat Citation(s)** from the ENX2 submenu/tab.

#### *Sharing a copy of the final formatted paper*

When submitting a copy of a manuscript to a publisher, it is recommended that you unlink the EndNote fields in the manuscript. This will prevent any potential problems with the formatted references when the recipient of the manuscript opens the file.

First, make a copy of the manuscript using the **Save as...** option. (EndNote may prompt for this automatically. If not, do it manually.) This is very, very important! Never unlink the fields in the master copy of the manuscript, as they cannot be relinked automatically.

In Word, unlinking the EndNote fields will also unlink all fields in the manuscript, including Word fields like date, time, index, table of contents, etc. Usually this will not be a problem.

In the manuscript copy, select **Remove Field Codes** from the ENX2 submenu/tab.

If you did accidentally unlink the master copy of the manuscript and you need to reformat the references, the only way to do this is to re-cite all of the references with EndNote again. If you have not yet closed the document, it may be possible to use Word's Undo feature to undo removing the field codes.

### **EndNote on the PDA**

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If your PDA is running Palm OS 4.0 or higher, has 16 MB RAM, and can be HotSync'ed, you can install and view an EndNote library on it.

1. Make sure HotSync is working.
2. Install the EndNote Palm OS software by selecting EndNote for Palm OS from **Start Menu > Programs > EndNote > Setup for EndNote for Palm OS**. (My PC does not have this option, it does have..**EndNote Pocket PC Synchronization**)
3. Sync the PDA to install EN.
4. On the PC, open EN. From the **Tools** menu, select **Configure Handheld Sync** and choose the library to save to the PDA. (Only one EN library can be on the PDA at a time).
5. Sync the PDA again to install the library.

When a library on the PC and PDA are synchronized, new and edited references are updated in the other library. If, however, the same reference is edited in both versions of the library, neither one will be overwritten; a new, nearly duplicate record will be added to each database. You can then decide which reference to keep. Information on updating, editing, searching, and beaming references is available in online help.

### **Compatibility of EndNote X1 with earlier versions of EndNote**

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EndNote X, X1 and X2 are fully compatible. You can share your libraries between these versions with no conversion. New features in EndNote X2 (such as Smart Groups) are simply ignored by the earlier versions. EndNote X2 can open and use EndNote 8 and EndNote 9 libraries with no conversion. Technically, EndNote 8 and EndNote 9 can open libraries created with EndNote X2, but it is not recommended ; you risk loss of data. Once you have opened and used an EndNote 8 or 9 library with EndNote X2, you should only use the library with EndNote X or later. For more information please see ENX2 online help.