



USING ENDNOTE X4: ADVANCED SKILLS

EndNote is a bibliographic management software package 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 (p.1-2)
- Working with term lists and the journal list (p.2-3)
- Working with import filters (p.4-5)
- Working with output styles (p.5-7)
- Using connection files (p.8)
- Using the Quick Edit screen (p.8)
- Using manuscript templates in Word (p.8.)
- Setting program preferences (p.8-9)
- Configuring EndNote to allow access to OhioLINK subscription full text resources (p.9)
- Downloading full text PDF files with bibliographic data (p.10)
- Creating hyperlinks between in-text citations and related references in the bibliography (p.10)
- Grouping multiple citations (p.11)
- Creating groups from other groups (p.12)
- Formatting multiple documents to create a single bibliography (p.12)

See also: *Using EndNote: Basic Skills*, available from the Library. For additional assistance, check EndNote's online help or contact Reference Assistance at your library (<http://www.utoledo.edu/library/serv/reference.html>).

- **Requirements to run ENX4: For Windows** visit <http://endnote.com/enwin.asp>
- **Get a copy of EndNote for home use** (for UT faculty, staff, and students). Log in to <https://myutaccount.utoledo.edu> and click the **Download EndNote Software** link.

Working with Reference Types

The basis of reference management in EndNote -- from importing citations to formatting references in a bibliography -- is the reference type. 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.

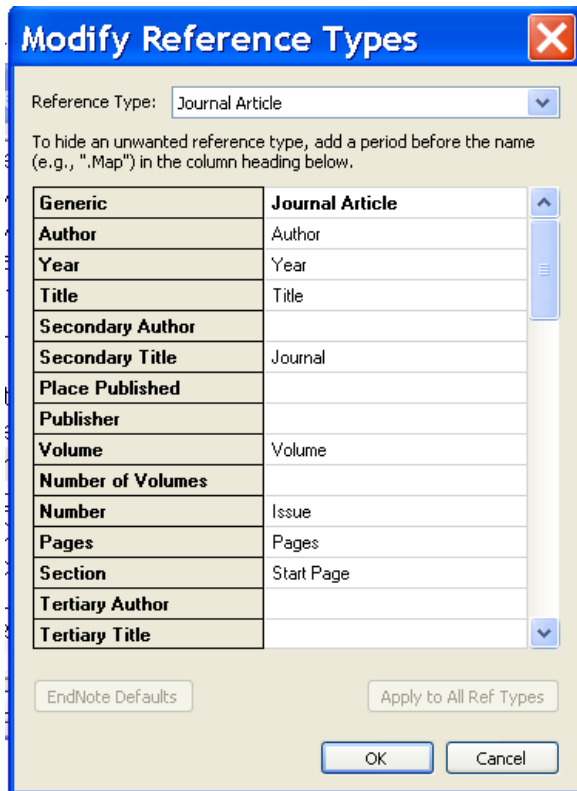
It is best to select the reference type before entering the bibliographic information in a reference; however, it can be changed at any time using the Reference Type drop-down menu at the top of the reference window.

Customizing reference types

Field labels for all reference types except generic can be modified. To modify field labels for a type:

- 1) Go to the **Preferences** option under the **Edit** menu
- 2) Click on the **Reference Types** option
- 3) click on the **Modify Reference Types** button
- 4) 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. The column to the right of the generic reference type contains name of the reference type selected and the field names for the selected reference type -- both 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).

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

To keep the reference types that are not used from being displayed in the drop-down menu, 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

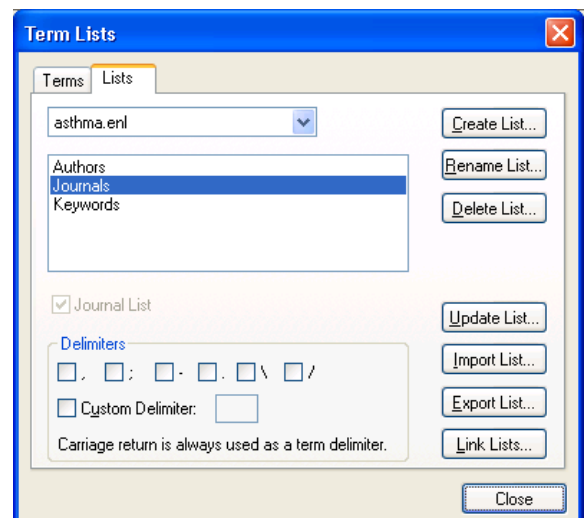
To reset the default settings for reference types, click the EndNote defaults button on the Reference type preferences window.

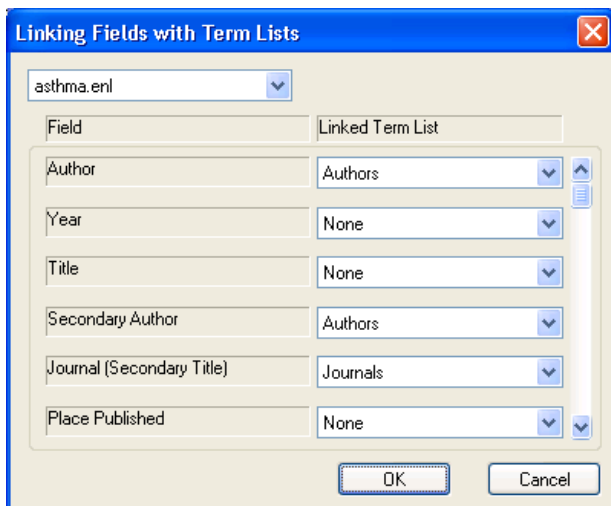
Working with Term Lists

EndNote automatically creates lists of words or phrases that may be used repeatedly within an EndNote library, called *term lists*. Term lists may also be created as needed. They can speed up manual entry of data (using the auto-completion feature) and can help maintain a controlled vocabulary for keywords and other terms. The term list is automatically updated in EndNote so as to stay current with the data that has been entered into the references. New terms entered into a reference will appear in red text. 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.

To create a new term list:

- 1) Select **Define term lists...** from the **Tools** menu. The terms list window (right) allows lists to be created, renamed, and deleted.
- 2) Select the desired delimiters (the punctuation used to separate terms).
- 3) Once the list has been created, click **OK**. A library can have up to 31 term lists, with no limit to the number of terms to a list, 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 appears (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 some fields (like **Author**) are linked to a term list, and others (like **Year**) are not. 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).

To add terms manually:

- 1) From the **Tools** menu, open the list of interest (Author, Journal, or Keywords)
- 2) Select **New Term** on the **Terms** tab and enter the term in the window provided
- 3) Click on **Save Term** to save and keep the window open so that another term can be added
- 4) Click on **OK** to 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

- 1) Make sure the references to be scanned are showing and highlighted in the reference window
- 2) Select the desired term list
- 3) From the **Open Terms List**, under the tools menu, choose **Update List**
- 4) Select the field(s) from which to search for new terms
- 5) Select **Update terms from selected references** if references have been selected
- 6) Click **OK**

Understanding the journal term list

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. It is used to perform automatic substitution of abbreviated journal names in formatted bibliographies.

EndNote X4 includes a number of files of journal names and abbreviations which can be updated. Download up-to-date journal term lists (NLM medical, BIOSIS, Chem Abstracts, or *L'Année philologique* classics and history) from the University of Queensland Library: http://www.library.uq.edu.au/faqs/endnote/journal_terms.html

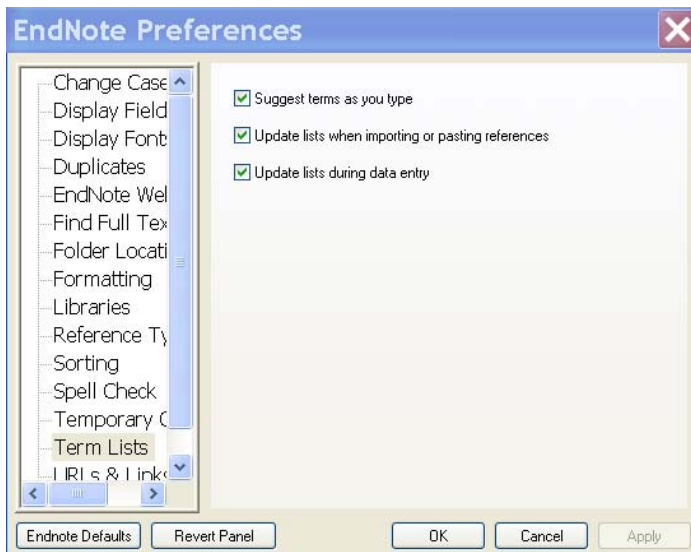
To import one or more of the files:

- 1) Open the library with which you want to use the journal list
- 2) 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)
- 3) 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 and 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, term lists are automatically updated as you import, drag-and-drop, 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

A filter is a file that contains instructions on how EndNote should import references from databases and online catalogs. The filter helps to place imported data into the appropriate fields in the reference window (authors end up in the author field, journal titles end up in the journal title field, etc.).

There is a variety of filters to accommodate the various database/information provider combinations. Any of the filters supplied with EndNote can be modified, and new filters can be created or downloaded from

www.endnote.com/support/enfilters.asp

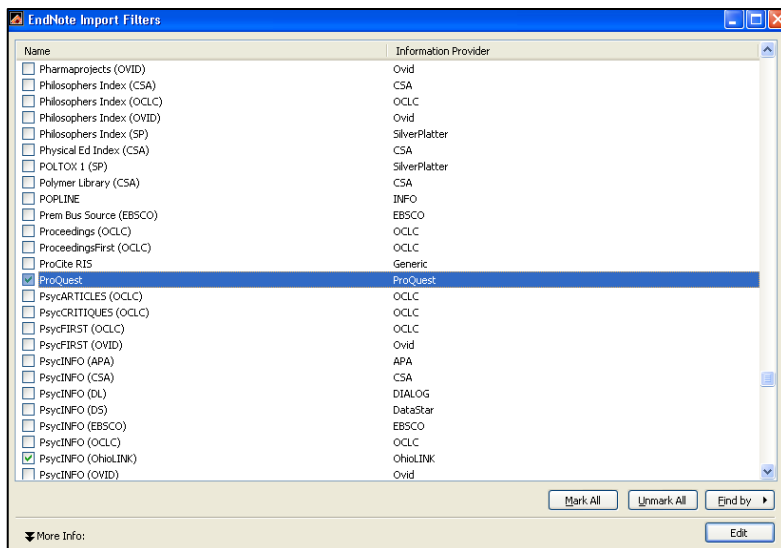
Using existing filters

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 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 University of Toledo.

```
%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
```



An **Import** option must be selected whenever a data file is imported. 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 (see left), select the filters to be displayed as import options, then close the window.

Before creating a new filter, check the **EndNote Import Filters** List to see if the desired filter already exists
(<http://www.endnote.com/support/enfilters.asp>). 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 EndNote's online help.

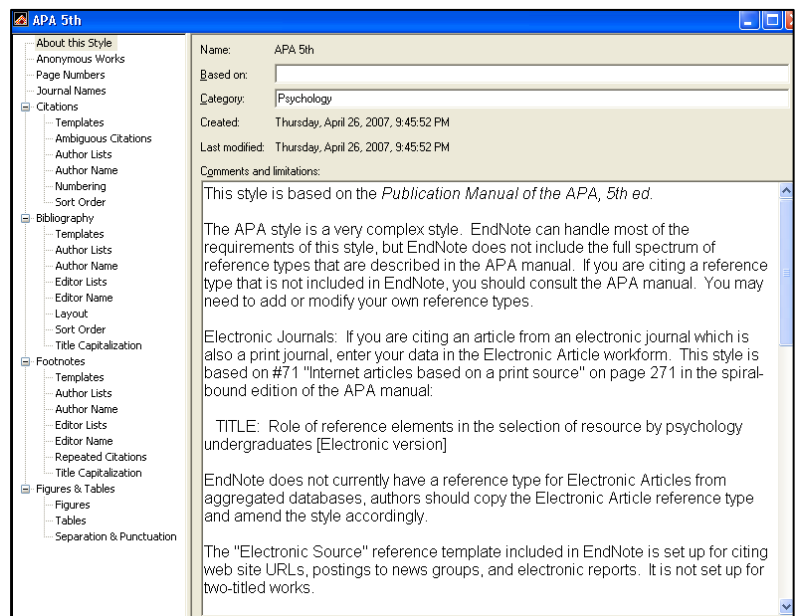
Working with Output Styles

An output style (or bibliographic style) is a template that tells EndNote how to format the citations in a manuscript or bibliography. EndNote includes over 2,800 automatically-created output styles (APA, AMA, NLM, Vancouver, Chicago, etc.). The [Basic Skills](#) help sheet discusses using output styles to format bibliographies, editing existing styles and creating new ones. Styles can also be downloaded from <http://www.endnote.com/support/enstyles.asp>. See the EndNote manual and online help for additional information.

Editing existing styles

To edit an existing style, first make a copy of the style to be modified:

- 1) Access the style manager window by selecting **Output styles** from the **Edit** menu and choose **Open Style Manager**
- 2) From the style manager window, highlight the format to be edited and click on the **Edit** button. This will call up the style window (above example: APA format)
- 3) Select the **Save As** option from the **File** menu. Give the style a new name.



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.

The list on the left side of the window includes all options that can be modified. The first four options are relevant for citations, bibliographies, and footnotes:

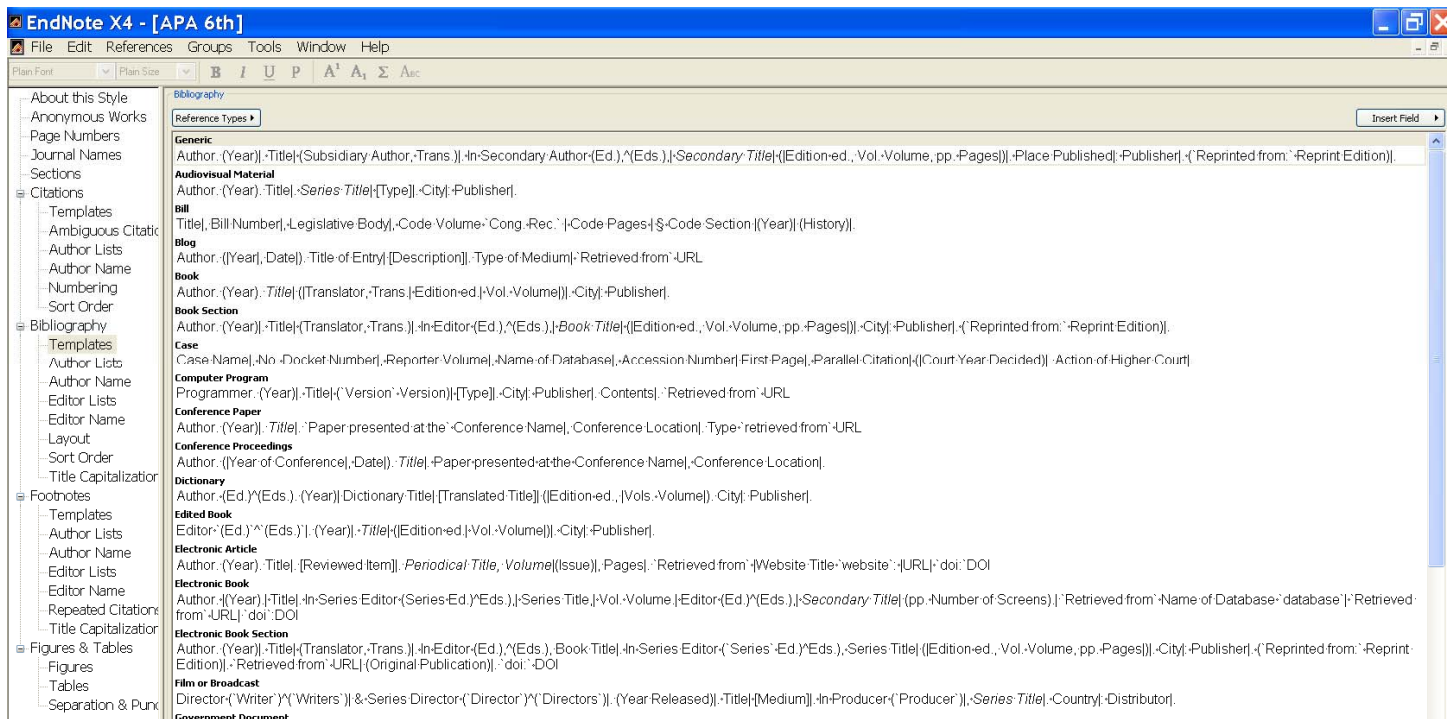
- **About this style.** In this option, add a description and category for this style.
- **Anonymous works.** In this option, indicate how EndNote should handle references where the author field is blank (not "anonymous").
- **Page numbers.** Indicate how page numbers should be handled (full or abbreviated, 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

For each reference type in a style, there is a style template (see below), which is a string of fields and codes that tells EndNote how to display the data in a reference. To open up a template:

- 1) Click on **Edit**
- 2) Click on **Output Styles**
- 3) Click on **Open Style Manager**
- 4) Select the style to be edited
- 5) Select Template from the left-hand menu

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



The template for a journal article in APA format is shown above. 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.

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

With the exception of the Annotated style, EndNote's output styles create bibliographies without including abstracts or annotations. To create an annotated bibliography for any output style:

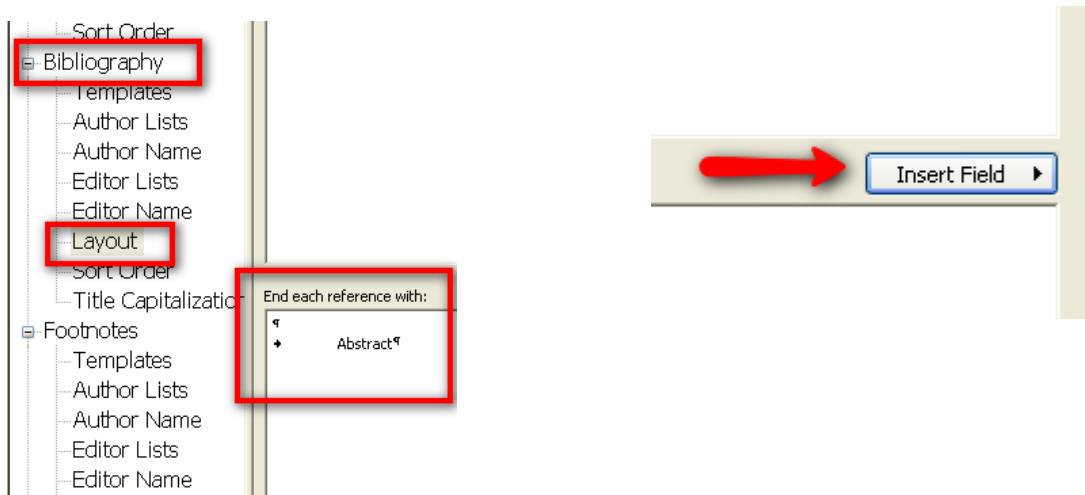
First, create a copy of the style to annotate (see *editing existing styles* above)

Select **Bibliography > Layout** from the menu; 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 shots below, 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

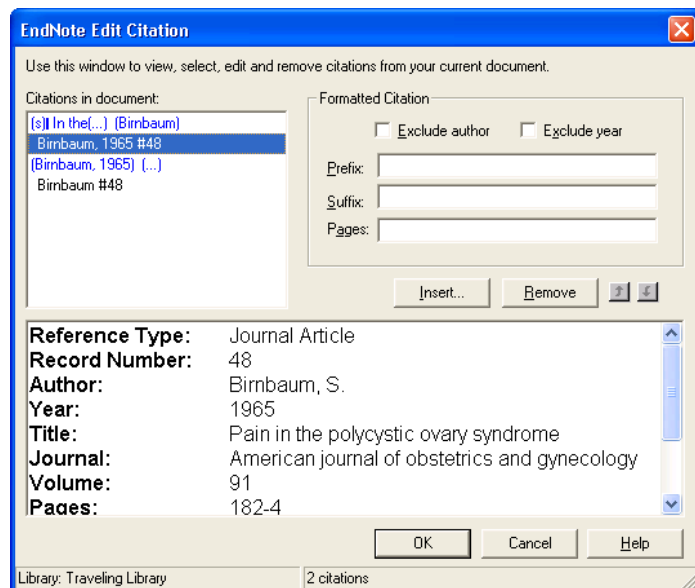
- 1) Add a **Link adjacent text**
- 2) Add a **Tab** (if the first line of the annotation should be indented)
- 3) Add another **Link adjacent text**
- 4) Add the desired field

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 **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.

Exclude author Omits the author(s) name from the formatted citation

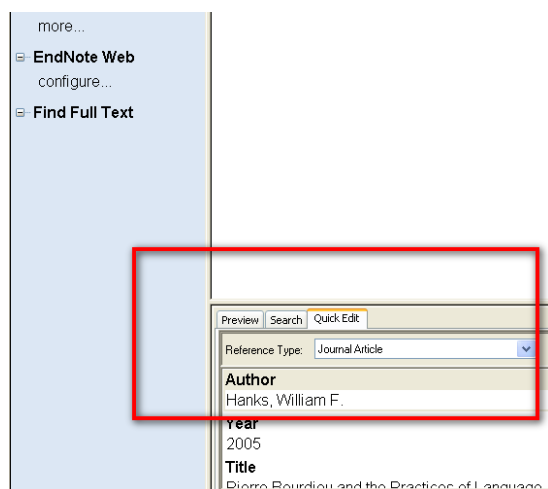
Exclude year Omits the date from the formatted citation

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 may need to be modified to include cited pages in the citation template (see to the right).

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.



Quick Edit screen

EndNote X4 allows for easy editing and managing of selected fields within a citation without opening the record. From the Tab Pane (see left), add page numbers, exclude author/s, format bibliography (change style, line spacing) etc. Click outside the edit window to save changes.

Working with Manuscript Templates for MS Word

EndNote is installed with 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 EndNote's 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 EndNote's 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 ENX4 submenu from the **Tools** menu or in Word 2007, **Preferences**.

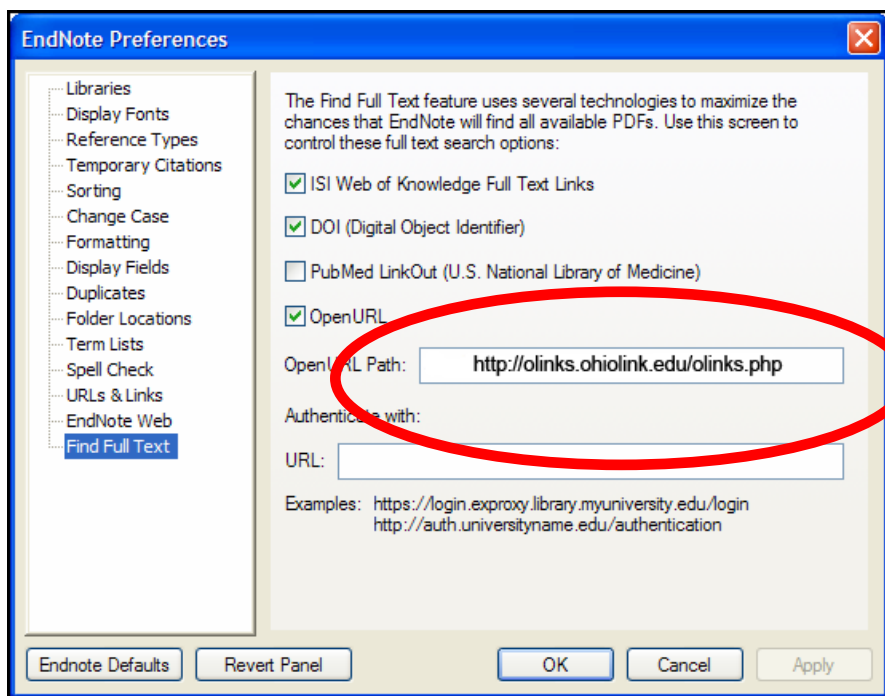
Open/Close	Indicate whether EndNote should be automatically launched when Word is launched and/or closed when Word is closed
Return to document	Indicate whether Word should be the active window once citations have been inserted
Instant Formatting	Activate or deactivate this feature
Keyboard Shortcuts	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.

Finding Full Text

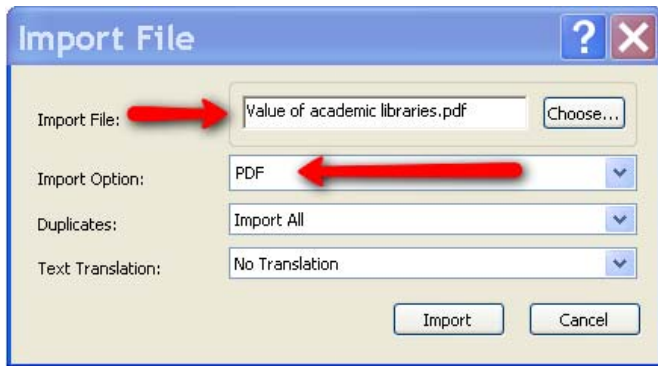
EndNote can be configured to allow access to OhioLINK subscription full text resources through the OhioLINK OpenURL server.

To enable access, Go to **EndNote -- Edit -- Preferences -- Find Full Text -- OpenURL Path**. Select the OpenURL check box, and enter **<http://olinks.ohiolink.edu/olinks.php>** in the OpenURL path box.

UT authentication information will be required when attempting to use Find Full Text from off-campus.



Importing PDFs



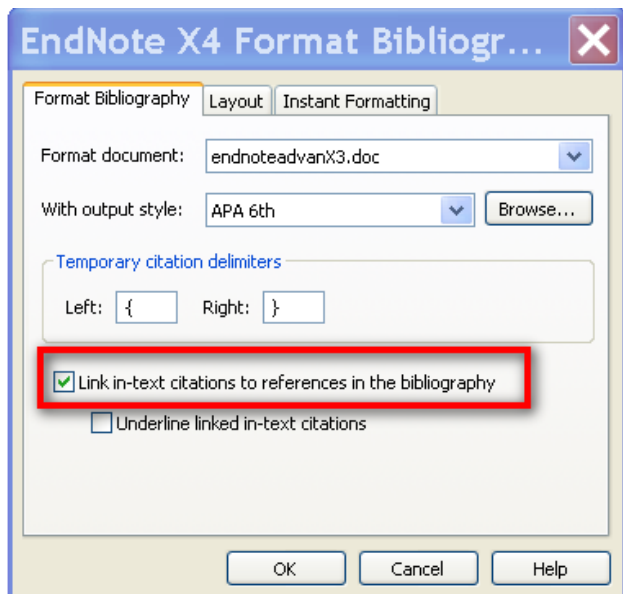
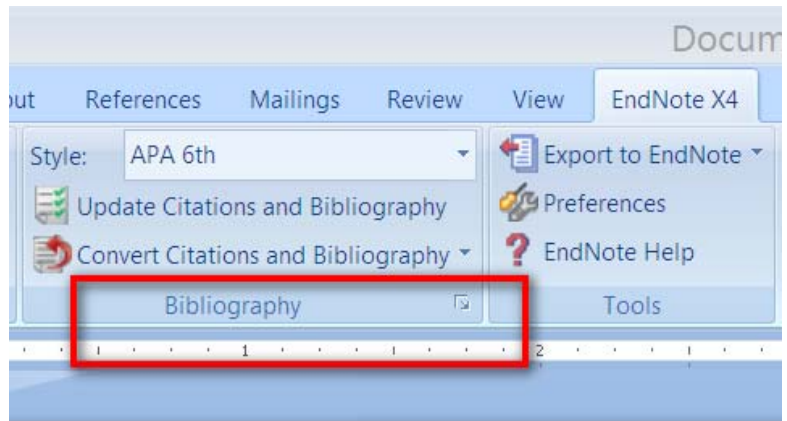
Existing collections of PDF files may be converted into EndNote records with minimal typing and copying by extracting Digital Object identifiers (DOI) from PDF files. **Scanned documents will not be imported with the accompanying bibliographic content.**

To import **publisher-created** PDFs or folders full of PDF files (no scanned documents)

- Select a library
- Select "import" under the file menu
- Set import option to PDF, **or**
- Select folder option to import entire folder (If the selected folder lists sub-folders, click the *Include files in all sub-folders* radio button to include)
- Click the Import button to add to the library

To create hyperlinks between in-text citations and related references in the bibliography:

- 1) Click on **Bibliography** under the EndNote tab (in Word 2007 – see right)
- 2) Select "Link in-text citations to references in the bibliography" (in Word 2007 – see below)
- 3) Select "Underline linked-in text citations"



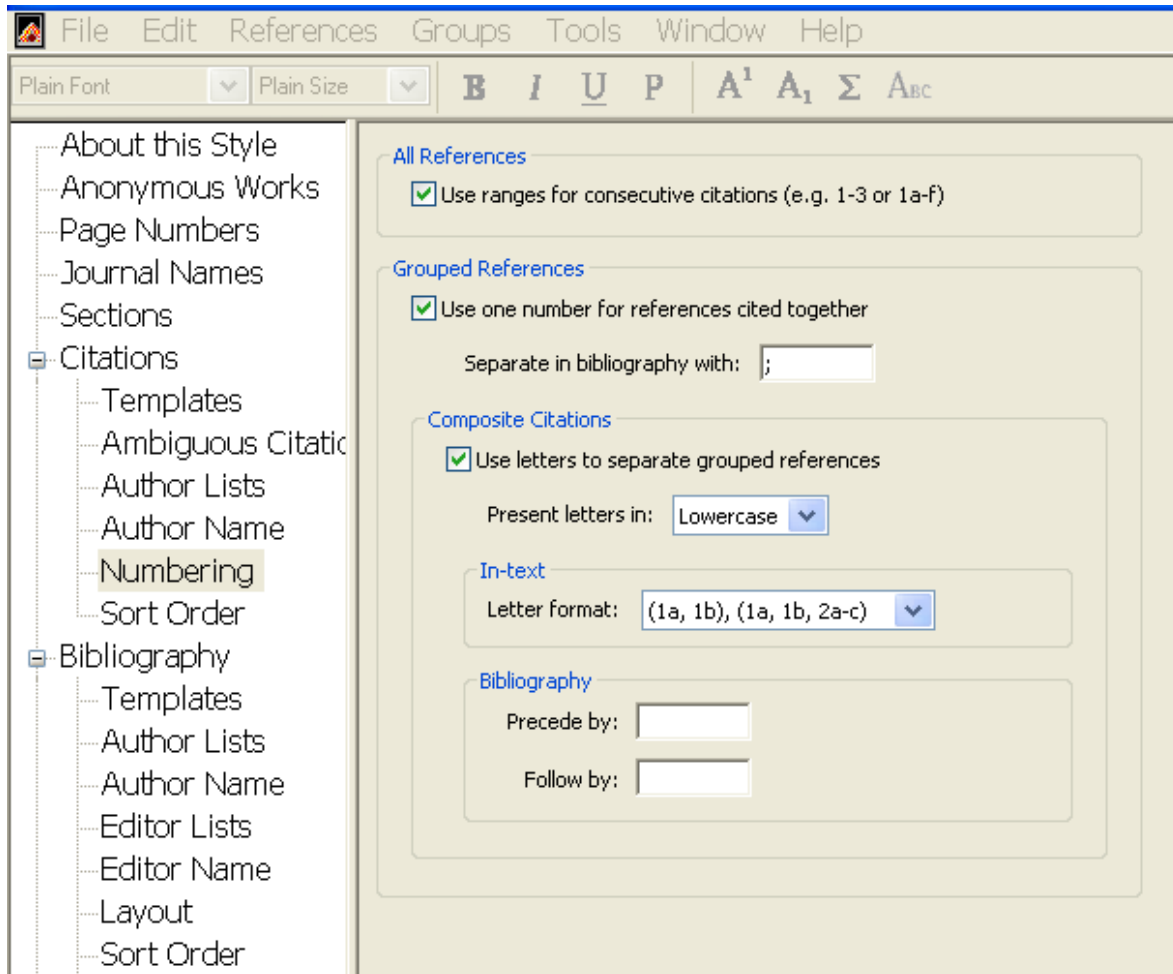
Links will carry over to the PDF when using the Publish feature in Word 2007.

Grouping Multiple Citations

Use the **Grouped Reference** option to cite with one number any references that always appear together as multiple citations. One number is used both in the text and the bibliography to identify a group of citations. There is an option to specify how the grouped references in the bibliography should be separated.

This option shows a semicolon and a space as a separator:

1. McCormick, MP, *Geophysical Research Letters* (1999) **15**, 907; Pemberton, SG, Jones, B, *Journal of Paleontology* (1999) **62**, 495; Postma, G, *Sedimentary Geology* (1999) **58**, 47.



To differentiate individual citations within grouped references with letters (see above):

Define a composite citation:

1. Select the box to “Use letters to separate grouped references.”
2. Use the “Present letters in” list to select Lowercase or Uppercase letters.
3. Select the appropriate letter format for in-text formatted citations. The examples illustrate how letters and numbers appear for consecutive citations and ranges.
 - The number always appears with a stand-alone letter or with the first letter of a range. This is the default setting: (1a, 1b), (1a, 1b, 2a-c)
 - Only the letter of the first citation of the composite is preceded with the number: (1a, b), (1a, b, 2a-c)
 - The letter of the first citation of the composite is preceded with a number; additional letters include a
 - number only if there could be ambiguity: (1a, b), (1a, 1b, 2a-c)
 - Letters are always preceded by a number: (1a, 1b), (1a, 1b, 2a-2c)
4. Use the “Precede by” and “Follow by” boxes to enter any character(s) chosen to surround the letter in the bibliography.

Create Groups from Other Groups

Custom and smart groups can be combined under a single group by using AND, OR, and NOT logic. First, save references in custom and smart groups, then save these sets of groups as a combined group set. To create a combination group:

1. From the Groups menu, choose *Create from Groups* to display the Create from Groups dialog.
2. Enter a name for the combination group.
3. In the fields under the Include References heading, select up to 10 custom and/or smart groups to use as search criteria.
4. Use AND, OR, NOT to include or exclude custom and/or smart groups in the combined group set.
5. Use the Add (+) and Remove (-) buttons to manage which groups to be included in and/or remove from your combined group set.



There is a limited of 500 custom and smart groups per library. Once that limit is reached, a group must be deleted before a new one can be added.

Note: A combination group set *cannot* include group sets.

Creating a Bibliography from Multiple Documents

Use the Master Document feature in Word to create a single bibliography from multiple documents, e.g. a cumulative bibliography from several book chapters. (Or, use a single Word document split into Sections. See Creating Multiple Bibliographies in a Single Document at <http://endnote.com/support/helpdocs/EndNoteX4Help.pdf>.)

To generate a single bibliography:

1. Insert citations in each of documents or chapter to link them to references in an EndNote library (see p. 10).
2. In **Word 2003**, go to the Tools menu (in each document), then the *EndNote X4* submenu, and select *Unformat Citations*.
In **Word 2007 and 2010**, go to the EndNote tab, find the **Bibliography** group, and choose *Convert Citations and Bibliography* and then *Convert to Unformatted Citations*.
3. Close all documents.
4. Create a **new** document.
5. Select the **View** tab and click on **Outline** to make a new master document, then insert and display each of the chapters as subdocuments. (Consult Word documentation for instructions.) **[Note: If subdocuments are collapsed to hide their content in Outline view, expand them in order to display the contents of all subdocuments before continuing.]**
6. In **Word 2003**, go to the *Tools* menu, then to the *EndNote X4* submenu and choose *Format Bibliography*.
In **Word 2007 and 2010**: On the EndNote tab, go to the EndNote tab, find the **Bibliography** group, and click the bottom corner arrow. **[Note: documents cannot be locked (designated Read-only).**
7. Verify formatting options and click *OK*.

A bibliography will be created at the end of the master document, using citations from the master document and all displayed subdocuments. This can be moved anywhere within the master or subdocuments, and remains in that location even when reformatted. **[Note: EndNote will not format documents linked after the main document has been formatted. Text from the linked document will be ignored.]**