Thomson Reuters

EndNote® X4

Advance your Research and Publish Instantly

Cite While You Write™ in 4,500+ bibliographic styles!
Collect references and find full text
Collaborate with others using EndNote Web
Present your papers in ResearcherID

HELP

THOMSON REUTERS

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Introduction

Overview of Thomson Reuters EndNote

Welcome to EndNote X4 - the complete reference solution!

- EndNote is an online search tool—you can search online bibliographic resources and retrieve references directly into your EndNote library. You can also export references to EndNote from your favorite online resource (see “Direct Export Providers” in EndNote Help).
- EndNote is a reference and full text organizer with a collaborative Web tool—your personal reference library will save you countless hours of organizing your research. Group references according to your research projects and attach up to 45 files for managing related materials. EndNote can locate full text PDF files for you or create a reference when importing a PDF file. Transfer references to your EndNote Web account to share groups with other EndNote users easily and manage your ResearcherID publication list.
- EndNote is a bibliography maker—Cite While You Write™ takes the pain out of citing and formatting references in , Microsoft® Word, and OpenOffice.org Writer™ 3 for Windows. You can also create bibliographies for other presentation software using Format Papers (RTF files). There is simply no better tool than EndNote for handling diverse bibliographic style requirements.

EndNote and EndNote Web are collaborative tools to simplify working with colleagues.

- See What's New in EndNote X4 for a list of the most recent features added to EndNote.
- For documentation updates and correction notes for this release, refer to the Readme.txt file installed in the EndNote folder.
- For late-breaking news and updates, go to: http:// www.endnote.com/support.
- For a complete list of printable EndNote Help topics for Windows, go to http://endnote.com/support/helpdocs/EndNoteX4Help.pdf.

Trademarks

Top 10 Things to Remember about EndNote

1. EndNote does not replace the style manual. It will make it easier to follow the manual, but you will still need the manual.
2. Garbage in, garbage out. So check your import results, especially when working with sources such as Google Scholar that may have inconsistent data.
3. Use one EndNote library for all of your writing. It will make your life easier in the long run.
4. Use the Edit Citation command to make changes to citations in documents. Trying to make changes on the screen risks corrupting the EndNote citations.

5. If you are using footnote styles, your word processor controls the numbering and placement of the footnote and EndNote controls the formatting. So you will first need to insert the footnote using your word processor, then insert the EndNote citation into that footnote.
6. EndNote provides five ways of importing references:
    - Online search
    - Direct export
    - Importing text files
    - Importing PDF files
    - Through the Capture button in EndNote Web, which can import one record at a time into either an EndNote or an EndNote Web library

    The method you use will depend on which databases you need to work with. Talk to your librarian about searching online databases. They can tell you which databases you have available to you and the best way of searching them.
7. Online search uses the z39.50 Internet protocol, a standard protocol that was developed just for searching and retrieving bibliographic data. It has limitations.
    - It does not work through proxy servers.
    - It does not use the same port your browser uses.
    - It is not the same protocol your browser uses.
8. EndNote can be customized.
9. For collaboration, use the EndNote Web feature set in EndNote to store references online where your entire project team can access them.
10. Back up your EndNote Libraries.

About ResearcherID

ResearcherID.com is a Web site where invited researchers can register for a unique researcher ID number.

After registering, you are assigned an individual ID number that stays with you over the course of your career. For example, A-50-2009 means you are the 50th person to sign up in 2009.

The system includes tools that allow you to create a Web location where you can create a publication list from Web of Knowledge, Web of Science, and other databases in your research program.

ResearcherID is designed to seamlessly associate you with your scholarly work, assuring an accurate record of output and attribution. It provides a gateway for colleagues to quickly locate your published work and to identify you as a potential collaborator.

ResearcherID Features

At ResearcherID.com, you can:

- Update your profile information
- Build your publication list by using Web of Science search services or by uploading a file
- Select to make your profile public or private much like people do on Facebook and other Web sites

ResearcherID Tools

In addition, you can use new tools in the interactive Labs environment to understand your personal metrics. The tools include:

- Citing Articles Network - Graphically depicts who is citing your articles using an interactive world map
- Collaboration Network - Displays your collaboration associates also using an interactive world map
- Badge - A roll over tool that you can place on any Web page to provide a summary of your profile and recent publications

Would You Like to Know More ...

- Go to ResearcherID.com
- More information about ResearcherID

Contacting Thomson Reuters

Technical Support

Contact Technical Support if you encounter problems while using EndNote. Before contacting us, have a clear description of the problem and know the version of your copy of the Windows operating system, EndNote, and your word processor. Also have your EndNote product key available.

Questions about network connections and/or the use of your Web browser should be directed to your network administrator.

Note: To find the EndNote version, start EndNote and choose *About EndNote* from the *Help* menu.

Technical Support & Services

Go to Technical Support & Services for a list of frequently asked questions we receive about EndNote.

Customer Service

Contact Sales for general product information, pricing, quantity discounts, and referrals to dealers.

Contact Customer Service to order new copies or upgrades of EndNote, to check billing/shipping status, and to register your software.

Sales Information

Phone: 760 722 1227 (country code is 01)(Toll Free)
Phone: 760 438 5526 (country code is 01)
Fax: 760 438 5573 (country code is 01)
Web/Email: http://www.endnote.com/encontac

Web, E-Mail, and Phone Contact

For web/email or phone contact, please see: http:// www.endnote.com/ encontact.asp

Hours of Service

For hours and holiday closures, please see:
http:// scientific.thomson.com/support/ techsupport/hours/

International Customer and Technical Support

For customer support or technical support outside of North America, please visit our web site to check for a local distributor.

For a list of EndNote distributors, please see the EndNote web page at:
http:// www.endnote.com/ enintldist.asp

For a list of contacts for technical support, see the EndNote web page at:
http:// www.endnote.com/support/ enintltech.asp

The EndNote Web Site

The EndNote web site at http://www.endnote.com contains technical support tips, utilities for data transfer, and information about the latest versions of EndNote. You can also find updated styles, filters, connection files, and other related documents at this site. Go to the web site and look under *Support and Services*.

To easily locate incremental updates available on the web site, go to the *Help* menu in EndNote and select *EndNote Updates*.

Thomson Reuters Forums

If you wish to join an ongoing forum of EndNote users like yourself, go to the Thomson Reuters Forums page.

Join the EndNote social network at:

www.facebook.com/EndNote
www.twitter.com/EndNoteNews

Other Resource Contacts

EndNote Training

To view our EndNote tutorials or to download updates, output styles, import filters, document templates, and more, go to our Product Training page.

Support and Services

Go to the Endnote Web site and click *Support and Services* on the menu bar for technical support and services.

Thomson Reuters Forums

If you wish to join an ongoing forum of EndNote users like yourself, go to the Thomson Reuters Forums page.

Product Suggestions

To offer suggestion on how we can improve upon EndNote Desktop, go to Product Suggestions.

Printable Help File

For a complete list of printable EndNote Help topics, go to http://endnote.com/support/helpdocs/EndNoteX4Help.pdf.

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All other product and service names cited in this help file may be trademarks or service marks of their respective companies.

Notice regarding legal use of downloaded reference data

EndNote gives you the capability to import references from online databases and store them in your personal EndNote libraries. Some producers of online reference databases expressly prohibit such use and storage of their data; others charge an extra fee for a license to use the data in this way. Before you download references from a database, be sure to carefully check the copyright and fair use notices for the database. Note that different databases from the same provider may have varying restrictions.

What's New in EndNote X4?

What's New in EndNote X4?

EndNote X4 adds these features:

- Import and create new records from PDF files. Whether you are importing a single file or a folder of PDF files, EndNote uses metadata and DOI information to create a new reference and attach the source PDF. Basic bibliography information will be added automatically for most journal articles, conference proceedings, conference papers, and reports.
- Search the contents of attached PDF files. You'll find a new option on the field list to search PDF files separately, or in combination with the reference data.
- Modify references easily in the new Quick Edit tab on the main library window. Use the tabs to preview formatted references, search your library and online resurfaced now edit references–all without opening additional windows.
- Create new groups by comparing, combining or suppressing existing groups. The new smart groups are updated dynamically as your library grows.
- Transfer up to 10,000 references between the desktop and EndNote Web to share online groups with other EndNote users. Shared groups are now included when you Cite While You Write from EndNote Web.
- Expand your library retrieval results by adding wildcards within search terms.
- Edit references when comparing duplicates—copy/paste and save changes in the side-by-side view.

Cite While You Write new features include:

- Add hyperlinks between in-text citations and the bibliography reference in Microsoft Word using any journal style.
- Use expanded functionality when editing citations—track usage and more.
- Meet the complete APA 6th style requirements including specific handling of references with eight or more authors, hyphenated first names and DOI data.
- Improved footnote handling for the Chicago Manual of Style and similar footnote-based bibliographic styles.
- Traveling Library enhancements recognize references when sharing Word documents for better collaboration.
- Get a quick citation report of references cited in a Microsoft Word document with a new auto-group in the EndNote library.

Note: Thomson Reuters recommends that you view our What's New video at www.endnote.com/training.

If you have upgraded from an earlier version of EndNote, you may want to see:

- Features Added to EndNote X
- Features Added to EndNote X1
- Features Added to EndNote X2
- What's New in EndNote X3

APA 6th Settings

The APA 6th settings allows you to display the first six authors (or editors) followed by the text preset to (“, ...”) followed by the last author (or editor).

1. From the Edit menu, select *Output Styles*, *Open Style Manager*.
2. From the Style Manager window, select *APA 6th* from the list of names, and then click the *Edit* button.
3. From the Style window, choose *Author Lists (*or choose *Editor Lists* if you wish to edit settings for editors) under the Bibliography.
4. Select the radio button that reads "If eight or more authors, list the first 6 authors, insert , ... and add the last author's name."
5. Click *Save As* from the *File* menu.
6. Give your updated settings a name (for example, "MY APA 6th Settings"), and then click *Save*.

Note: The default value is ", ..." You can, however, change this value - for example, you can set this value to "et al." or whatever style you choose.

Note: When this setting is selected, it overrides whatever settings are in the *Author Separators* and *Editor Separators* settings at the top of the panels.

The following example shows how your references will now display with the selected APA 6th setting.

> Gilbert, D. G., McClernon, F. J., Rabinovich, N. E., Sugai, C., Plath, L. C., Asgaard, G.,... Botros, N. (2004). Effects of quitting smoking on EEG activation and attention last for more than 31 days and are more severe with stress, dependence, DRD2 A1 allele, and depressive traits. Nicotine and Tobacco Research, 6(2), 249-267. doi: 10.1080.1462220041000176305

APIs and Plug-ins

The “RSServices API” is technology from Thomson Reuters that provides a way to build on the power of EndNote. It exposes programmatic access to the core functionality of the EndNote application, allowing third parties to access database content and integrate EndNote with other tools. With the RSServices API users can create “plug-ins” that work within the EndNote interface to add customized functionality to EndNote and extend connectivity with other programs. Most of the RSServices API functions work with EndNote versions X-X4.

The basic functions of the API enable users to:

- Build plug-ins that add new functionality to EndNote
- Provide better integration with third-party tools and products.
- Create tools that extend the GUI of EndNote
- Script or batch existing EndNote capabilities and features
- Directly access records and data in EndNote Libraries (databases)
- Leverage the power of the EndNote formatting engine (Formatter)
- Directly Import or Export into or out of EndNote.

The RSServices API is intended for technical audiences who have knowledge of object-oriented programming languages, particularly C and C++. Users should also be familiar with the tools needed to produce compiled application code or DLLs. The API is available for both the Macintosh and Windows operating systems and behaves identically on each, unless otherwise specified.

Individual customers and third-party partners are encouraged to use the RSServices API to develop tools that closely interact with EndNote. Users are also encouraged to share their code and ideas with others on the EndNote User Forums - http://community.thomsonreuters.com/ts/?category.id=endnote.

While individuals are welcome to use and share their work with others, any party developing a component or tool that uses the RSServices API for commercial or wide-spread use must also sign a license agreement with Thomson Reuters to legally employ the API, RDK and any associated tools, documentation, or code.

The RSServices Development Kit (RDK)

Supporting documentation and code samples are provided as part of the RSServices Development Kit (RDK), the RDK is available by request directly from the Thomson Reuters EndNote team. The RDK is designed to work with several compilers and tools, including Apple's XCode and Microsoft's Visual Studio. In all cases, APIs are published in the C/C++ programming language, as are all samples and example code. It is assumed that the reader has a validly licensed copy of one or more of the aforementioned compilation products, as Thomson Reuters does not supply or warrant such tools as part of the RDK. While it should be possible to port these interfaces to additional compilers or programming languages, readers should consult their license agreement or the Thomson Reuters EndNote team before doing so.

Contact the Thomson Reuters EndNote team at: http://www.endnote.com/ensuggest.asp

Creating a Combination Group

Combine custom and smart groups under a single group to better organize your EndNote references. Use AND, OR, and NOT logic to create new, useful combined group sets. Save references in custom and smart groups, and 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 your search criteria.
4. Use AND, OR, NOT to include or exclude custom and/or smart groups in your combined group set.
5. You can also use the Add (+) and Remove (-) buttons to manage which groups you want to include in and/or remove from your combined group set

You are limited to 500 custom and smart groups per library. Once you reach that limit, you must delete a group before you can add a new one.

Note: You cannot include group sets in a combination group set.

To edit a combination group set:

1. Select the group that you want to edit.
2. From the Groups menu, choose *Edit Group* to display the Create from Groups dialog.
3. Enter a new name for the group (optional).
4. Use AND, OR, NOT to include or exclude custom and/or smart groups in your combined group set (optional).

You can also use the Add (+) and Remove (-) buttons to manage which groups you want to include in and/or remove from your combined group set.

To delete a combination group set:

1. Select the group that you want to delete.
2. From the Groups menu, choose *Delete Group* to display a dialog.
3. Click Delete to remove the combined group set from the Group pane.

Footnotes: Defining Long and Short Forms

Both full and short form templates are available from the Style window. Define short form footnote settings for Templates, Author Lists, Author Name, Editor Lists, and Editor Name.

1. From the Edit menu, select *Output Styles*, *Open Style Manager*.
2. From the Style Manager window, select a style from the list of names (for example, Chicago), and then click the *Edit* button.
3. From the Style window, choose a category under the Footnotes heading (for example, *Author Name*).
4. Enter all your changes.
5. Click *Save As* from the File menu.
6. Give your updated settings a name (for example, "My Chicago Footnotes Settings"), and then click *Save*.

Importing PDF Files to Create New References

This feature allows you to convert existing collections of PDF files into EndNote references with minimal typing and copying by extracting Digital Object identifiers (DOI) from PDF files. The system matches DOI information with data available from CrossRef (www.CrossRef.org) by capturing bibliographic content and creating new EndNote references.

To import a PDF file:

1. Open the library into which you want to import the references.
2. From the File menu, choose *Import File*.
3. Click the *Choose* button to locate and open the file you want to import.
4. Select the needed PDF file and click *Open*.
5. Select the *PDF* import option from the Import Option list.
6. Select an option from the *Duplicates* list:

   Import All: Imports all references, including duplicates.

   Discard Duplicates: Imports all references except duplicates.

   Import into Duplicates Library: Duplicate references are imported into a library called File-Dupl.enl, where "File" is the name of the library into which you are importing.

   By default, a reference is considered a duplicate when the Author, Year, Title, and Reference Type match a reference already in the library. See Duplicate Preferences if you would like to change the duplicates criteria.

7. Choose a *Text Translation* option. The default value is *No Translation*.

   This option allows you to specify the text character encoding of the file you import, so that extended characters transfer correctly. You should verify the setting with your database provider. Some U.S. databases that contain extended characters require *ANSI-Latin1* or *UTF8*. MARC format files may require *ANSEL* translation. You might be able to use *No Translation* for text files that do not contain any extended characters.

8. Click *Import* to import the file.

Note: When performing the import function, if there are two DOIs found in the first two pages of a PDF document, EndNote will put both DOIs in the DOI field. The PDF is then attached and the file name is put in the Title field.

When the import is complete, the new record is stored in the Imported References group, and will include bibliographic information given for the Digital Object Identifier (DOI) mined from the PDF file such as title, author, volume, issue, page, year, and DOI. This is a perfect time to add a keyword to the imported reference with the *Change Field* command, or to peruse the imported data to make sure it imported as expected. Make sure to check references that contain extended characters.

The Imported References group is a temporary group that is replaced each time you import another set of references. It is removed when you exit EndNote (although the references remain in the library).

To return all of your references to the library display (including the newly imported ones), choose *Show All References* from the *References* menu or click the *All References* group.

Importing PDF Folders to Create New Records

This feature allows you to convert existing collections of PDF files into EndNote records with minimal typing and copying by extracting Digital Object identifiers (DOI) from PDF files. The system matches DOI information with data available from CrossRef (www.CrossRef.org) by capturing bibliographic content and creating new EndNote records.

To import a PDF folder with PDF files:

1. Open the library into which you want to import the references.
2. From the File menu, choose *Import File*.
3. Click the *Choose* button to open the *Browse for Folder* dialog window.
4. Select the needed *PDF* folder, and then click *OK*.
5. If the selected folder lists sub-folders, click the *Include files in all sub-folders* radio button to include PDF files in those sub-folders in the import operation.
6. Select the *PDF* import option from the Import Option list.
7. Select an option from the *Duplicates* list:
    - *Import All:* Imports all references, including duplicates.
    - *Discard Duplicates:* Imports all references except duplicates.
    - *Import into Duplicates Library:* Duplicate references are imported into a library called File-Dupl.enl, where ”File" is the name of the library into which you are importing.

    By default, a reference is considered a duplicate when the Author, Year, Title, and Reference Type match a reference already in the library. See Duplicate Preferences if you would like to change the duplicates criteria.
7. Click *Import* to import the files in the selected folders.

Note: When performing the import function, if the are two DOIs found in the first two pages of a PDF document, EndNote will put both DOIs in the DOI field. The PDF is then attached and the file name is put in the Title field.

When the import is complete, the new record is stored in the Imported References group, and will include bibliographic information given for the Digital Object Identifier (DOI) mined from the PDF file such as title,

author, volume, issue, page, year, and DOI. This is a perfect time to add a keyword to the imported reference with the *Change Field* command, or to peruse the imported data to make sure it imported as expected. Make sure to check references that contain extended characters.

The Imported References group is a temporary group that is replaced each time you import another set of references. It is removed when you exit EndNote (although the references remain in the library).

To return all of your references to the library display (including the newly imported ones), choose *Show All References* from the *References* menu or click the All References group.

The Quick Edit Tab

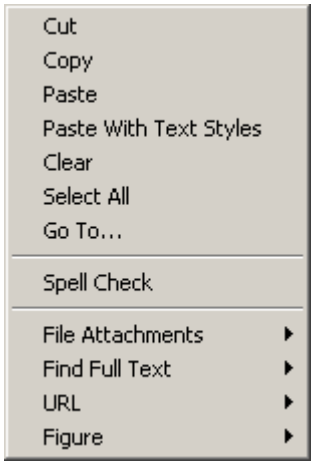
The Quick Edit pane in the Preview area of the EndNote window displays the contents of the highlighted reference. Each part of the reference is stored in its own field, and the type of reference is displayed below the title bar.

You can quickly edit your references by clicking on the *Quick Edit* tab. Most functionality is the same as working in the Reference window. Enter text in a field by clicking on the field. All commands are available via the menus including contextual menus. The Attach File and Find Full Text features are also available in the Quick Edit pane.

Press the *Tab* key to move to the next field in the Quick Edit pane to edit its contents. Press the *Shift+Tab* keys to move to the previous field.

Press the *F6* key to navigate from the Groups pane (side panel), to the Reference List, to the Quick Edit pane.

Right-click in the Quick Edit pane to display the following menu.



Resizing the Quick Edit Pane

Like most windows in EndNote, the Quick Edit pane can be resized by clicking the top border and dragging the pane to the desired size.

Note: If the Reference window is open, the Quick Edit pane is in read-only mode. The fields cannot be edited. Only the Copy and Select All options are available by right-clicking in the Quick Edit pane.

Changes Made to Records Outside Quick Edit

All changes made to a record in the Reference window or Find Duplicates, which are displayed in the Quick Edit pane are reflected in Quick Edit after the record is saved or you complete Find Duplicates. If more than one record is selected in the Library panel, the last record selected and saved is displayed in the Quick Edit pane.

The EndNote Library

About the EndNote Library

Important Points About Libraries

Listed below are some important points about the EndNote library. Detailed information about each of these items follows.

- 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.
- There is no limit to the number of libraries you can create, assuming that you have the disk space to store them. We recommend that you keep all the references you cite in your papers in one primary library.
- You can select default libraries to open automatically when EndNote is started.
- You can open more than one library at a time.
- Libraries created with the Windows version of EndNote can be used by the Macintosh version of EndNote, and vice versa (see Transferring Libraries Across Platforms).
- Each library can be independently moved, copied, renamed or deleted using the Windows Explorer (or by opening "My Computer") . Move, copy, rename or delete both the main . ENL file and the .DATA folder.
- Figures, Groups, and other significant files are stored in a [library name].DATA folder which is in the same folder as your main library file. This folder is an extension of the library, so remember to move, copy, rename, or delete the associated DATA folder along with the main library file.
- Library filenames include the extension . ENL. If your library filename does not include an . ENL extension, Windows Explorer may not be displaying file extensions. You can change this setting in Windows Explorer if you wish.
- The Library window can be resized and the display font can be changed to any font or size that you prefer.
- The Library window displays a multi-column reference list. By default, the first column shows a paper clip icon for references that include an attached file in the File Attachments field. Then, the first author's last name, the year, the title, the journal name or secondary title, the reference type, the URL, and the Last Updated date are displayed for each reference. You can change the displayed fields with the Display Fields preference.

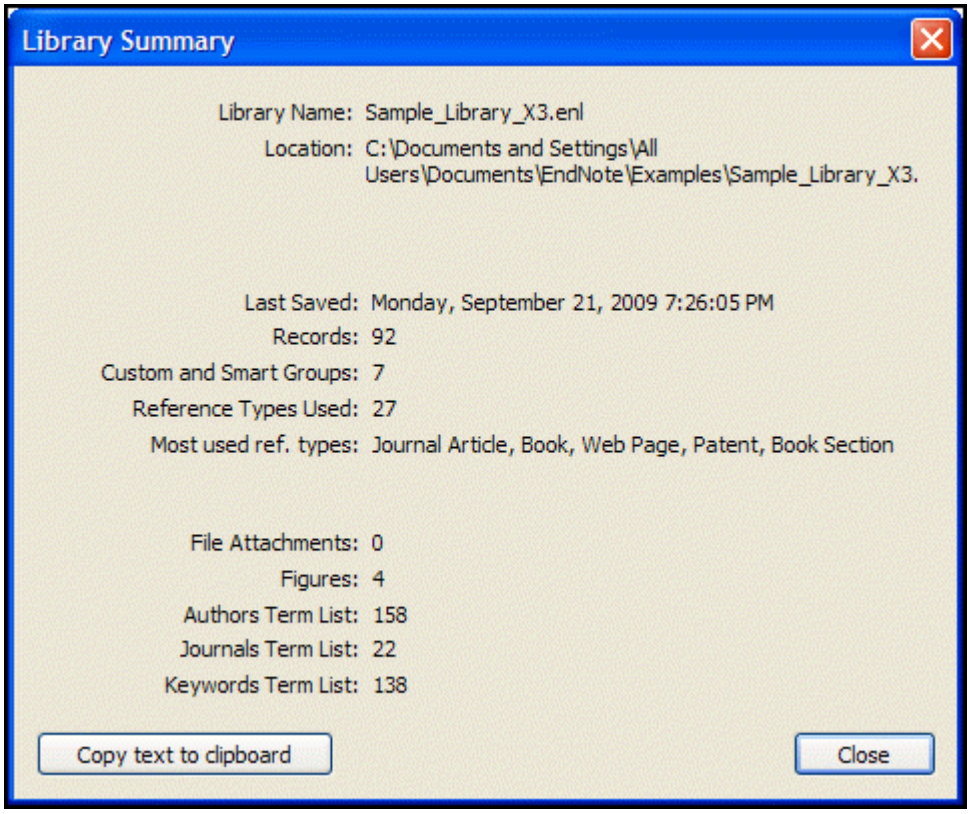
Back Up Your Libraries

Your EndNote library becomes increasingly valuable to you as you add references to it. Consequently, it is imperative that you back up your libraries, along with any other important documents. Each library is made up of a file with the extension . ENL plus a corresponding .DATA folder. Always back up both the . ENL file and the .DATA folder.

You can use the *Save a Copy* command or one of the *Compressed Library* commands to save a copy of your library to a removable disk (or elsewhere) for safe keeping. See Backing Up Your EndNote Files for more information about making backup copies of your files.

Library Summary

To see a summary of statistics about the currently open library, go to the Tools menu and choose *Library Summary*.



If you wish to save and print this information, use the *Copy text to clipboard* button and then paste the text into a word processor document.

For a list of statistics about a specific reference, see Record Summary.

The Library Window

About the Library Window

When you first open a library with EndNote, you see a Library window made up of three different panes: a Reference List pane, a Groups pane, and a Tab pane. You can click on a pane to make it active, or press F6 o jump between the panes.

The Reference List pane displays individual references on a single line, showing first a paper clip icon for references that have a file attached to the File Attachments field, and then the first author's last name, the year, the title, the journal name or secondary title, the reference type, the URL, and finally the Last Updated date. See The Reference List Pane for information about how to navigate in the reference list, how to change the display fields, and how to sort the list.

The Groups pane allows you to display subsets of references from your library. See The Groups Pane for information about Temporary groups, Custom groups, Smart Groups, and Online Search favorites. To control whether Online Search groups are displayed, see The Display Modes.

The Tab pane includes several tabs to easily access common library tasks. See The Tab Pane for a description of the Preview and Search tabs.

The selection of groups and menu commands available changes depending on the display mode. See The Display Modes.

Resizing the Library Window

Like most windows in EndNote, the Library window can be resized by clicking the window border or lower right window corner and dragging to the desired size, or by clicking the maximize or minimize buttons in the upper corner of the Library window.

EndNote remembers the new size of the Library window as well as its location on the screen so the next time you open it, the library appears with the same dimensions and in the same location as when you last closed it. Each EndNote library can have its own unique dimensions and screen location.

Changing the Library Display Font

Choose a different font and size for the text displayed in the Library window by using EndNote's preferences. The list of references in the Library window uses the Library display font.

The Preview tab on the Tab pane uses the General display font. Changes made to the display fonts apply to all EndNote libraries opened on that computer.

To change the Library Display Font:

1. From the Edit menu, choose *Preferences*.
2. Click the *Display Fonts* option.
3. On the Library tab, click the *Change Font* button, and select a different display font and/or size from the *Font* and *Size* lists. Click *OK* to close the font selection dialog and return to the *Display Fonts* preferences panel.
4. Click *OK* to save the changes and close the Preferences dialog.

Changing the display fonts does not affect the font EndNote uses when it creates a bibliography. EndNote uses the font of your paper for the bibliography.

The Library Window Display Modes

You can choose from different display modes in the Library window. You may want to always work in **Integrated Library & Online Search Mode**, where all groups and commands are available. When you download references from an online database, they are saved directly into your open library.

The other option is to work primarily in **Local Library Mode** and switch to **Online Search Mode** when you want to search and download references from an online database. In Local Library Mode, the Online Search groups are not available; once you select the *Online Search* command from the Tools menu, you are automatically switched to Online Search Mode. In Online Search Mode, only the Online Search groups are available, and references are downloaded into a temporary library. This allows you to download references from online databases without affecting your local library. Many library commands are not available in Online Search Mode.

To switch between these modes, click on the appropriate toolbar button.

Integrated Library & Online Search Mode

When you first create a library, Integrated Library & Online Search Mode is in effect. All groups and menu commands are available. When you perform an online search, the found references are downloaded directly into the currently open library.

When you close a library with Integrated mode in effect, that setting is retained; when you open the library again, all groups are available.

Local Library Mode

Local Library Mode does not display Online Groups. It displays automatic groups, Custom groups, Smart groups, and EndNote Web groups. It keeps you from inadvertently searching an online database and downloading references into your currently open library.

When you go to the Tools menu and choose *Online Search*, or click on the Online Search Mode icon on the toolbar, EndNote switches into Online Search Mode.

When you close a library with Local Library Mode in effect, that setting is retained; when you open the library again, only local library groups are available.

Note: You can still use *Find Full Text*, use the *Import* command, or direct download references into your local library. Only an *Online Search* command switches to Online Search Mode.

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.

When Online Search Mode is in effect, the only groups available in the Library window are Online Searches, as well as the automatic groups “Online References” and “Online Trash.” When you retrieve references from an online database in Online Search Mode, the references are downloaded into a temporary library. If you want to save the references you have downloaded, you must copy them to an existing EndNote library.

When Online Search Mode is in effect, many menu items are disabled. You cannot save changes to an individual reference or make global changes to references.

When you close a library with Online Search Mode in effect, that setting is not retained; when you open the library again, Local Library Mode is in effect, with only local groups available.

The Reference List Pane

The Reference List pane in the main Library window displays individual references on a single line, showing first a paper clip icon for references that have a file attached to the File Attachments field, and then the first author’s last name, the year, the title, the journal name or secondary title, the reference type, the URL, and finally the Last Updated date.

Navigating in the Reference List

There are a number of ways to browse through your references.

- Scroll through the list of references in the Library window by clicking in the vertical scroll bar with the mouse.
- The up and down arrow keys move up or down from the currently selected reference, or if nothing is selected they select the last or first reference in the library, respectively.
- You can quickly sort the references by clicking on a column heading. For example, click *Year* to sort by year. A second click will change the order of the sort from ascending to descending.
- Typing a letter selects the first matching reference. The matching depends on the order in which the library is sorted. If the library is sorted by the Author field, typing a letter selects the first reference in which the author’s last name begins with that letter. For example, typing the letter "Z" selects the Zartman reference in our sample library since Zartman is the first author’s name to begin with a "Z." Type several letters and the selection jumps to the first name that begins with those typed letters. Letter matching starts over after a half-second pause.

- Home and End keys go to the first or last reference respectively; Page Up and Page Down move up or down a screen of references.
- To find specific references, choose *Search Library* from the Tools menu. (See Searching for References.)

Changing Display Fields

In the Library window, EndNote defaults to showing first a paper clip icon if a file is attached to the File Attachments field, then the Author, Year, Title, Journal Name or Secondary Title, reference type, URL, and Last Updated date for each reference. You may display other fields, change the order of the fields displayed, or change the names used for the column headings in the Library window.

To customize the Library window display:

1. Edit menu, choose *Preferences*.
2. Click the *Display Fields* option in the list.
3. Choose the desired field from the Field list. You may select up to eight fields to be displayed in the Library window. Select *[Do not display]* instead of a field name if you want to show fewer than eight fields.
4. By default, the column heading in the Library window will be the same as the Generic name of the field (the *Figure* field is indicated by *fig.* , and the *File Attachments* field is indicated by a paper clip icon). If you would like to change the name for the Library window display, you may do so by entering a new name in the Heading section next to the chosen field.
5. If you would like to display all author names under the Author heading in the library reference list, rather than just the first author, select the check box next to *Display all authors in the Author field*.
6. *OK* to save the changes and close the Preferences dialog .

These settings apply to all libraries.

The Reference List Sort Order

The references listed in the Library window are automatically sorted by the first author's last name, the year, and the order in which they were entered (the record number). This sort order can be changed by choosing *Sort Library* from the Tools menu (see Sorting the Library) or by clicking the column headings. When you sort a library, that sort order is retained even after you close and reopen a library.

When you sort the library, character sorting is carried out according to the language and local settings of your operating system— unless you specify a different language in the *Sort Options* dialog. This determines, for example, whether a plain "a" is sorted before or after " ä."

The library sort order is not remembered for all groups. EndNote displays the results of a search in the order in which they were found. Similarly, after importing references, EndNote displays the newly imported references in the order in which they were imported. This behavior greatly enhances the speed of these two functions. Choosing *Show All References* from the References menu returns all of the references to the Library window and lists them according to the last sort order specified.

Note: See Sort Order: Bibliographies and Multiple Citations about how to set the sort order for a bibliographic style. See Sorting Preferences for information about having EndNote ignore certain words or names when sorting references.

The Groups Pane

Groups are subsets of references saved for easy retrieval. The left pane of the library window lists several Group Sets that include various types of groups: Automatic groups, Custom Groups, Smart Groups, Online Search groups, EndNote Web groups, and Find Full Text groups. Each is described below.

A new library may display only the permanent All References, Unfiled, and Trash groups. To display a group of references in the Reference List pane, click on the group name.

Note: If you find that not all groups are available, see The Library Window Display Modes.

Group Sets

Groups sets are indicated by group set headings in the Groups pane. Some group sets are permanent, and cannot be removed. These include Online Search, EndNote Web, and Find Full Text, which are described below. A new library begins with one custom group set: My Groups. You can rename it at any time. You can also create any number of additional custom group sets. Custom group sets can contain any combination of custom groups and smart groups, as described below.

Expand or collapse the list of groups under a group set heading by clicking the plus (+) or minus (-) button . Click and drag a group set heading to move the group set to a new location.

For more information about group sets, see Using Custom Group Sets.

Automatic Groups

Automatic groups include both permanent and temporary groups, are listed at the top of the Groups pane in the Library window, and cannot be changed.

The permanent groups are:

All References: This displays all of the references in the current library. If you highlight a subset of references in this group and then display only those selected references, the name of the group changes to Showing References. The status line along the bottom of the window will always tell you how may references you are viewing plus the total number of references in the library.

Unfiled: This group contains those references that are not part of a custom group (and optionally not part of a smart group). Right click on Unfiled to display a context sensitive menu and toggle the setting *Exclude Smart Groups in Unfiled/Include Smart Groups in Unfiled*.

Trash: This group contains the references you have removed from the library by selecting *Move References to Trash* from the *References* menu. While the references are officially no longer in your library (they will not appear in any other group or reference list, they are not included in your reference count, and they cannot be searched or cited), they are not completely deleted until you go to the Groups menu and choose *Empty Trash*. Until you choose *Empty Trash*, you can still drag references from the Trash group back to your active library.

The temporary groups are:

Copied References: This temporary group displays the last group of references that were retrieved in Online Search Mode and then copied into your permanent library with the *References>Copy References to* command.

Duplicate References: This temporary group displays the results of duplicate detection in your library. You can run duplicate detection with the *References>Detect Duplicates* command. See Finding Duplicate References.

Imported References: This temporary group displays the last set of references imported into the library with the *File>Import* command. See General Importing Instructions.

Search Results: This temporary group displays the most recent search results. Each time you run another search on the library, this group is replaced. See Searching for References.

Find Full Text groups are also automatic and temporary, but they appear under a Find Full Text group set, described below.

Note: When you close a library, all temporary groups are deleted. Only the groups are deleted; the references are still in the library!

Custom Groups and Smart Groups

Custom Groups and Smart Groups are user defined. You can create up to 500 user defined groups and organize them in custom Group Sets.

You can easily drag and drop individual references or lists of selected references to and from Custom Groups. Custom Groups are updated only when you specifically add or remove references.

Smart Groups are dynamically updated by applying search criteria to each reference as it is added or updated.

For more detailed information about saving references in groups, and saving those groups in custom group sets, see About Groups.

Online Search

The Online Search section in the Groups pane lists your "favorite" connection files for online searching. When you click on one of these connection file names, the Search tab in the Tabs pane becomes active and you are connected to the selected online service in order to begin searching. For more information about online searching, see How to Search an Online Database.

If the Online Groups section is not available in the Groups pane, you may be displaying the Library window in Local Library Mode. See The Library Window Display Modes.

EndNote Web

The EndNote Web section in the Groups pane lists your online EndNote Web folders. You can copy references between your EndNote desktop library and your EndNote Web folders. See Overview of EndNote Web.

Find Full Text

The Find Full Text group set lists temporary groups that appear when you select *Find Full Text* from the *References* menu. The groups remain for the current session, but disappear when you close the library.

Searching...: This group displays the current set of references for which EndNote is attempting to find either the full text file of each referenced work or at least a URL to the referenced work. When the full text search is completed, this group is deleted. Those references to which full text or a URL was added are displayed in a Found PDF group or a Found URL group.

Found PDF: This group displays the set of references for which EndNote inserted the PDF file of the referenced work as an attachment. These references will display a paper clip icon in the first column of the reference list.

Found URL: This group displays the set of references for which EndNote inserted a URL to the referenced work.

Not Found: This group displays the set of references for which EndNote could not identify a full text file or a URL. These are only from the set of references searched with the *Find Full Text* command during this session of the EndNote library.

For more information about Find Full Text, see Finding Full Text for a Reference.

The Tab Pane

The Tab pane in the main Library window includes three tabs, which give easy access to common library tasks. They include: Preview, Search, and Quick Edit.

You can hide or display the Tab pane. When the Tab pane is displayed, click the *Hide Tab Pane* option at the bottom of the Library window to hide the pane. Once the Tab pane is hidden, the command changes to *Show*

Tab Pane; clicking that option restores the Tab pane. You could also select *Hide Tab Pane/Show Tab Pane* from the *Tools* menu.

To change the height of the Tab pane, click on the bar that separates it from the reference list, and drag up or down. (When the cursor is over this area, it changes to indicate that you are in the right place to resize the pane.)

The Preview Tab

To view a formatted preview of the currently selected reference, click on the Preview tab or press Alt +P.

The preview displays the selected reference in your current style. If multiple references are selected, it displays just the last one in the selection. The preview is not editable; to edit the reference, double-click it in the reference list.

Choosing the Current Style

Since the preview uses the current style, it's important to know how to select that style. To select your current style:

- On the Main toolbar, use the Output Styles list to select a new style.
- Or, from the Edit menu, choose *Output Styles* and select a style in the list. The check mark next to a style name indicates that it is the current style.

If you do not see the style that you want on the toolbar or in the Output Styles menu, do not worry. Over 4,500 styles are provided with EndNote and are available via the Style Manager. Go to the *Edit* menu, choose *Output Styles*, and then *Open Style Manager*. Then, mark the style or styles that you would like to be available in your Output Styles menu. You should now be able to choose the style that you need from the Output Styles menu. (For more information, see The Style Manager.)

You can also add styles to the menus using the *Select Another Style* option from the style list on the toolbar . Simply choose *Select Another Style*, select the style, and click *Choose.*

Previewing Multiple References

The preview tab displays a preview for only one reference at a time, formatted according to the current style. To preview multiple references:

1. Select (highlight) the references in the Library window.
2. From the Edit menu, choose *Copy Formatted* to copy the formatted references to the Windows Clipboard.
3. Use the Windows Clipboard Viewer to view the contents of the Clipboard, or *Paste* the formatted references into a word processor document.

Using the Preview to Display Notes or Abstracts

You may find it useful to configure the Library window so that the reference list displays bibliographic data (such as author, year, title, and journal), and the preview tab displays just notes or abstracts. That would allow you to browse through your references in the Library window without having to open individual references to see more about them.

To get the preview to display just the notes or the abstract, you will need to create a custom style to include just those fields (see Printing Only the Notes).

You can use the *Show All Fields* style to display all reference fields on the preview tab.

The Search Tab

To begin a search of your EndNote library, display the group of references you want to search and then choose *Search Library* (Ctrl +F) from the Tools menu or click the Search tab on the Tab pane. The **Search tab**

appears, displaying several empty **search lines** (you can add more if necessary). See The Search Tab and Searching for References.

To begin a search of an online database, click on the database name in the Groups pane under Online Search or go to the *Tools* menu and choose *Online Search*. See The Search Tab and a Quick Overview of Online Database Searching.

The Quick Edit Tab

Select this tab to quickly enter changes in the Quick Edit pane.

Most functionality from the Quick Edit pane is the same as working in the Reference window. Enter text in a field by clicking on the field. The following commands are available in Quit Edit: Cut, Copy, Paste, Paste without Text Styles, Clear, and Select All.

All commands (including Save) are available via the menus including contextual menus. The Attach File and Find Full Text features are also available from the Quick Edit pane.

Creating Libraries

Creating a New Library

Although you can create as many libraries as you like, we strongly recommend that you keep all of your references together in one main EndNote library. Having all of the references you need in one place avoids unnecessary complexity when you are writing papers, creating bibliographies, or moving files between computers. Instead of making different "specialty" libraries, you will find it more useful to create one library and use Groups to help you organize and categorize your references. You can also use the Keyword and Label fields to assign terms to references, and easily assign them to a Smart Group or find them with EndNote's *Search* and *Sort References* commands.

To create a library:

1. From EndNote's File menu, choose *New*.

   EndNote presents a dialog prompting you to name and save the new library.

2. Enter a name for your new library. If you include an extension, use the extension " ENL" which stands for "EndNote Library." If you do not include an extension, EndNote will add ". ENL" automatically.

3. Using the "Save in" list, choose the location where you would like to save the library.

4. Click *Save* and the new library appears as an empty EndNote library, "Showing 0 out of 0 references."

Note: On disk, each EndNote library is made up of both an . ENL file and a .DATA folder.

Now that you have created a new library, you can begin entering references into it. The following topics illustrate the different ways to add references to an EndNote library:

> Creating a New Reference discusses how to enter individual references manually.
>
> Quick Overview of Online Database Searching describes how to connect directly to online databases and retrieve references from them.
>
> General Importing Instructions shows you how to import references that you have previously downloaded from online bibliographic databases.

If you have just created a library that will be the main library that you use, you can set it to open automatically every time you start EndNote by setting it to be your "favorite library" (see Setting a Favorite Library).

Saving a Copy of a Library

EndNote automatically saves changes to your library as you work with it, so there is no *Save* or *Save As* command for the library. You can, however, use the *Save a Copy* command to create an exact copy of your library.

To create a copy of your library:

1. With a library open, choose *Save a Copy* from the File menu.
2. Name the new library and choose where to save it.
3. Click *Save* and EndNote creates a copy of the library.

The new library does not open, it is simply saved to disk, where you can then open it with EndNote. EndNote leaves your original library open as it was before the command was chosen.

Note: The *Save a Copy* command creates a [library name]. ENL file as well as a [library name].DATA folder for the new library, and copies all necessary files and figures to it.

Saving a Compressed Copy of a Library

You can save your complete library (the filename.enl file as well as its associated .DATA folder and all of its contents) to a single compressed filename.enlx file in order to easily back up your library or send a copy to a colleague. Later, you can easily restore (unzip) the compressed library with EndNote.

Note: EndNote libraries larger than 4 gigabytes (GB) or 65,535 files (64 K) cannot be compressed with EndNote's *Compressed Library* commands.

To save to a compressed library file:

1. Open the library in EndNote.
2. From the File menu, select *Compressed Library (. enlx)* to display a Compressed Library dialog.
3. Use the radio buttons to determine these options:

   a. In the top left side of the dialog, specify whether to just *Create* the compressed library, or to *Create & Email* it.

   b. In the top right side of the dialog, specify whether to save file attachments with the library or not.

   c. In the bottom half of the dialog, specify whether to save all references to the compressed library, or only the selected (highlighted) references, or only the references in a specific group or group set.

   d. Click *Next* to display a file dialog.

4. Use the file dialog to save to an EndNote Compressed Library (filename.enlx).

   Any of the following characters in the original library filename will be replaced with an underscore in the compressed library filename.

These characters are replaced with an underscore	
\	(back slash)
/	(forward slash)
:	(colon)
*	(asterisk)
?	(question mark)
"	(quotation mark)
<	(less than)
>	(greater than)
|	(vertical bar)

5. If you selected the option to *Create & Email* the library, EndNote will launch your default email system, create a new email, and attach the compressed library file to the email.

Enter additional information to the email, such as a recipient, subject, and message, and *Send*.

To restore a compressed library file:

1. Use EndNote (version X or later) to open the filename.enlx file, which will extract the . ENL file and the .DATA folder to the same folder where the . enlx file is located.
2. Use EndNote to open the filename.enl file as you normally would to use the library.

Setting a Favorite Library

EndNote allows you to specify the libraries that you want to open automatically when EndNote starts up. We call these the "favorite" libraries.

You do not need to select a favorite library. By default, EndNote will open the last used library.

To assign or change the favorite library:

1. Open the library (or libraries) that you would like to set as your favorite. (You must have a library open in order to set it as your favorite library.)
2. From the Edit menu, choose *Preferences* and select *Libraries*.
3. In the drop-down list at the top of the window, choose “Open the specified libraries.”
4. Click *Add Open Libraries* and all of the currently open libraries will be added to the list of favorite libraries that should open every time EndNote starts.
5. Click *OK* to save your changes and close the Preferences dialog.

To remove a library from the list of favorite libraries:

1. From the Edit menu, choose *Preferences* and select *Libraries* from the list of options.
2. Select the library that you would like to remove from the list of favorite libraries and click *Remove Library.*
3. Click *OK* to save your changes and close the Preferences dialog.

Opening, Closing, Deleting Libraries

Opening a Library

To open a library when the EndNote program is already running, choose *Open* from EndNote’s File menu and select *Open Library* . (If you have previously opened a library, EndNote will list that library name below the *Open Library* command; you can simply choose the library name to open it directly, and skip the dialog shown below.)

When you choose the *Open Library* command, EndNote displays a file dialog.

By default, this dialog displays all files with the extension ENL, ENLX, or LIB. If your library name has a different extension, you should change the "Files of Type:" option to *All files (*.*)*.

If your library is listed in the dialog, select it and click *Open*. If your library is not listed there, then it is probably saved in a different place on your hard drive or removable disk.

To locate a library:

1. Click the "Look in" list and select the letter of the drive on which your library is stored.

2. Select the folder that contains your library and click *Open.* (If your library is within several folders, continue to open each folder until you locate the library.)
3. When you see your library, select it and then click *Open*.

When you open a compressed library (with the extension . ENLX), EndNote uncompressed the files and opens the uncompressed version (with the extension . ENL).

Multiple People Opening One Library

EndNote does not perform record locking functions that would allow multiple users to *edit* one library at the same time. However, multiple users can *access* one EndNote library simultaneously as long as the library is restricted to *read-only* or *locked* status. This will allow the user to perform searches, copy information to their documents, and format their papers. Use Windows Explorer to change the Properties of your EndNote library; select the Read-Only attribute for the . ENL file and the .DATA folder.

The simplest way to set up an EndNote library for shared network access is to use the network's system of file permissions to control the type of access allowed for users and groups. Except for the person who posts the database, grant all users read-only access.

One person should be assigned the responsibility for maintaining and updating the library at a separate location; this user should be granted full access to the file. Then, periodically post the updated library on the network for all other users, with read-only access.

Closing a Library

To close a library, do one of the following:

- Choose *Close Library* from the File menu.
- Type Ctrl+W or Ctrl+F4 when the Library window is active.
- Click the *Close* button in the top right left corner of the Library window.
- Type Ctrl+Shift+W to close all open libraries.

EndNote automatically saves the information in your library when you close each reference. As a result, closing the library does not invoke the familiar "Save changes?" question. Instead, the Library window simply disappears, as all changes have already been saved.

Closing a library does not quit the EndNote program. If you want to quit from EndNote, choose *Exit* from the *File* menu and any open libraries are saved and closed automatically.

Deleting a Library

You can delete an EndNote library in one of two ways.

One option is to exit EndNote and delete the library file and its associated .DATA folder by dragging the icons to the Recycle Bin on the Windows desktop.

To delete a library from within EndNote:

1. Close the library, but keep EndNote open.
2. From the *File* menu, select *Open* and then *Open Library*.
3. In the file dialog, highlight the libraryname.enl file, right click your mouse, and click *Delete*.
4. Next, highlight the libraryname.DATA folder, right click your mouse, and click *Delete*.
5. Click *Cancel* to close the file dialog.

Recovering a Damaged Library

Occasionally computer files get damaged. If an EndNote library gets damaged, you may get an error message when trying to open it or work with the references. The best way to protect yourself from damaged files is to make regular backup copies of your important documents (see Backing Up Your EndNote Files). If you do not have a backup copy of a damaged EndNote library, you can use the *Recover Library* command to repair the damaged file.

To repair a damaged EndNote library:

1. Close the library if it is currently open.
2. From the Tools menu, choose *Recover Library*. Read the information about the Recover Library command, and click *OK*.
3. In the dialog that appears, locate and select the library that needs to be repaired, and click *Open*.
4. EndNote creates a copy of the library with the suffix "-Saved" added to the name. For example, if you were repairing a library called "References" the original library would remain untouched and a new, repaired library called "References - Saved" would be created in the same location.

Once the new library has been saved, you should be able to open it and use it in place of the damaged library.

Note: The *Recover Library* command also creates a new DATA folder. If you rename the recovered library to the original library name, remember to also rename the DATA folder to match.

Differences Between Saved Libraries & the Original

The purpose of the *Recover Library* command is to recover as many references from the original library as possible. This means that it may also recover references that had previously been deleted from the library, but not yet purged from the file itself. If there are more references recovered in the saved library than existed at the time the original library was damaged, it means that EndNote was able to reconstruct references that had recently been deleted. These references must be deleted again.

Term lists are not recovered with the library. Consequently, you will need to rebuild each term list by choosing *Define Term Lists* from the *Tools* menu, highlighting the list, and then clicking *Update List* to fill the term list with the terms used in your library.

Images cannot be repaired, but are simply copied from the original library's DATA folder to the new DATA folder.

Merging Libraries

Merging Libraries

There are three ways to merge libraries: import one library into another, copy references from one library to another, or drag-and-drop.

Any time you add references to a library, the newly added references are assigned new record numbers in the order that they are added to the library. This means that a reference that was #23 in a smaller library, could become #600 in a larger library. As a result, you cannot use the larger, merged library to format papers that have citations with the older record numbers.

Note: Before merging libraries, it is a good idea to make a backup copy of the library into which you are transferring references.

Importing EndNote Libraries

The advantage of using the *Import* command to combine libraries is its ability to filter out duplicate references during the import operation.

Note: Before merging libraries, it is a good idea to make a backup copy of the library into which you are transferring references.

To import an EndNote library into an EndNote library:

1. (Optional) If you want to import only a subset of references from a library, first open that library and show only the references you wish to copy. For example, if the library says, "Showing 10 out of 200 references," EndNote imports only 10 references. If the library you are importing is locked or in "Read-Only" mode, *all* references are imported regardless of what is currently showing.

2. Open the library into which you want to import the references.

3. From the File menu, choose *Import*.

4. Click the *Choose File* button to locate and open the library you want to import. Select the file and click *OK*.

5. From the Import Options list, select *EndNote Library.*

6. Select an option from the *Duplicates* list:

   Import All: Imports the references, including duplicates.

   Discard Duplicates: Imports the references, except duplicates.

   Import into Duplicates Library: Duplicate references are imported into a library called File-Dupl.enl, where "File" is the name of the library into which you are importing.

By default, a reference is considered a duplicate when the Author, Year, Title, and Reference Type match a reference already in the library. See Duplicates Preferences if you would like to change the duplicates criteria.

7. Set the *Text Translation* option to *No Translation.* Extended characters, saved as Unicode in EndNote, will transfer correctly.

8. Click *Import* to import the file.

Note: The time required to import an EndNote library is proportionate to the size of the library. Refer to the progress indicator to determine when EndNote has completed the task.

When the import is complete, only newly imported references display in the Library window. This is a perfect time to add a keyword to each imported reference with the Change Field command, or to peruse the imported data to make sure it imported as expected. Make sure to check references that contain extended characters.

To return all of your references to the library display (including the newly imported ones), choose *Show All References* from the References menu.

Using Drag and Drop

To copy specific references from one library to another, simply select them in one library (hold down the Ctrl key to select non- consecutive references; use the Shift key to select a range), click on any part of the selection and use the mouse to drag the selection to another library. The selected references are copied to the library where they were "dropped."

Copying References in Libraries

You can also use the *Copy* and *Paste* commands in the Edit menu to transfer references. Select the references that you want to copy and choose *Copy* (Ctrl + C) from the Edit menu. Open the library to which you want to add the references and choose *Paste* (Ctrl +V).

Sharing Libraries Across Versions and Applications

Compatibility between EndNote 8, 9, X, X1, X2, X3, and X4

EndNote X, X1, X2, and X3 are fully compatible with X4. You can share your libraries between these versions with no conversion. New features in EndNote X4 are simply ignored by the earlier versions.

EndNote X4 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 X4, but we do not recommend it; you risk loss of data. Once you have opened and used an EndNote 8 or 9 library with EndNote X4, you should only use the library with EndNote X or later.

Because EndNote X4 does include enhancements, please note that:

> The DATA folder is a critical part of your library. Whenever you copy or move a library, include not only the filename.enl file, but also its associated DATA folder and all of its contents.

Note: If you want to back up your library, or share it with another EndNote X or later user, there is an easy way to compress your EndNote X4 library and include all of the associated files and folders. See Saving a Compressed Copy of a Library.

> EndNote X2 included new reference types. If an earlier version of EndNote does not recognize the reference type, it will display and print the Generic reference type for those references entered into the new reference types.
>
> In order to allow cross-version and cross-platform compatibility of attached files, you will need to replace the characters below if they are used in the filenames of existing attached files and graphics—and then reinsert the files. One option is to replace these characters with an underscore.

Replace these characters in attached filenames	
\	(back slash)
/	(forward slash)
:	(colon)
*	(asterisk)
?	(question mark)
"	(quotation mark)
<	(less than)
>	(greater than)
|	(vertical bar)

> EndNote X1 included a new grouping feature, and EndNote X2 added Smart Groups. If you open an EndNote X4 library with an earlier version of EndNote, you cannot view groups. However, groups are remembered when you open the library again with EndNote X4.

Opening and Converting Old EndNote Libraries

EndNote 8, 9, X, X1, X2, and X3 Libraries

EndNote X4 can easily open and use libraries created with EndNote 8, 9, X, X1, X2, and X3. No conversion is necessary. EndNote X, X1, X2, X3, and X4 are fully compatible; you can regularly share your libraries between these versions

Note: Once you have opened and used an EndNote 8 or 9 library with EndNote X4, you should only use the library with EndNote X or later.

EndNote Libraries Prior to Version 8

EndNote X4 can automatically convert libraries created with earlier versions of EndNote (versions 5, 6, or 7) to the latest file format. In most cases, the same process will work for libraries created in EndNote 4 and earlier.

To open or convert an older EndNote library:

1. Start EndNote.
2. From the *File* menu, select *Open* and then *Open Library* .
3. On the file dialog, locate and highlight the old library, and click *Open Library*.

   EndNote will warn that the selected library was created with an older version, and will ask for permission to convert it.
4. Click *OK* to convert the library. Name the new library and click *Save*.

Note: The time required to import an EndNote library is proportionate to the size of the library. Refer to the progress indicator to determine when EndNote has completed the task.

The conversion makes a *copy* of the original library in the latest X4 file format, and leaves the original library intact.

Note: You must use EndNote X, X1, X2, X3, or X4 to access the converted library.

Creating a Library from ProCite

EndNote can easily convert ProCite databases to EndNote libraries. The original ProCite database is left intact; references are copied and converted.

While every effort has been made to map ProCite workforms to corresponding EndNote reference types, and ProCite fields to corresponding EndNote fields, you may wish to make some adjustments. There are some ProCite fields, such as Connective Phrase and Author Role, that do not have an equivalent EndNote field; text from these fields will transfer into the Notes field. As you go through the conversion process, you are given the option to *Customize* the workform and field mapping. For a list showing the workform mapping from ProCite to EndNote, see ProCite Workforms to EndNote Reference Types.

Note: Custom ProCite workforms do not convert to specific EndNote reference types, and are displayed as a Generic EndNote reference. You should either globally change the workform assignment in ProCite before conversion, or, during conversion, click the *Customize* button to map custom workforms to EndNote reference types.

To convert a ProCite database to an EndNote library:

1. In EndNote, go to the File menu and choose *Open>Open Library* to display a file dialog.
2. At the bottom of the dialog, next to "Files of type," use the drop-down list to select "ProCite database (* pdt)."
3. Use the file dialog to navigate to the folder that contains the ProCite database, highlight the database name, and click *Open*.

   A message will let you know that the database must be converted for use.
4. You can either:

   - Click *Convert* to proceed with the conversion, or
   - Click *Customize* if you wish to modify the mapping of ProCite workforms to EndNote reference types and ProCite fields to EndNote fields.

     Use the top half of the dialog to map each workform to a corresponding EndNote reference type. When you highlight a setting in the top half of the dialog, you can change the field mapping for that reference type in the bottom half of the dialog. Click *OK* to save changes to the mapping.

   5. On the "Save Converted Library as" file dialog, give the new EndNote library a name (the default is the same as the old ProCite name), select a folder, and click Save.

EndNote will convert the library. When the conversion is complete, the library will open in EndNote.

Creating a Library from Reference Manager

To use a Reference Manager database with EndNote, you must first export the references to a text file and then import from the text file into an EndNote library.

To convert a Reference Manager database to an EndNote library:

1. Export your Reference Manager references to a text file:
   a. Open Reference Manager and the database you want to convert.
   b. From the *File* menu, choose *Export*.
   c. Select the RIS export format, and choose *All References*.
   d. Export to a text file.
2. Start EndNote and open or create the library to contain the imported references.
3. From the File menu, select *Import*.
4. Click *Choose File* and select the text file you created.
5. Next to Import Option, select the RefMan (RIS) import filter.
6. Click *Import*.

Converting a Library for ProCite, Reference Manager, or an Earlier Version of EndNote

Converting an EndNote X4 library for use with EndNote versions 5-7, for Reference Manager, or for ProCite requires exporting the references from your EndNote library to a text file, and then importing from the text file into the other program.

If your references contain diacritics, you must do this carefully so that your diacritics transfer correctly. Because EndNote X4 is Unicode compliant, it exports text as UTF-8 Unicode, and not as traditional ANSI text. Reference Manager, ProCite, and earlier versions of EndNote are not Unicode compatible, so they need the document converted to ANSI text. If you attempt to import references that have not been saved as ANSI text, diacritics will appear scrambled in the new database or library format.

Note: EndNote X4 allows the use of Extended Latin and double-byte character sets, which are not supported by EndNote versions earlier than version 8. Extended Latin and double-byte characters will not transfer to earlier version file formats.

To convert your EndNote X4 library for other applications:

1. In EndNote X4 , go to the drop-down output style list on the toolbar , and choose *Select Another Style*. Highlight and *Choose* the appropriate output style:

   For EndNote 5, 6, or 7: Select the Refer style.

   For Reference Manager or ProCite: Select the RefMan (RIS) style.

2. Go to the File menu and use *Export* to export your library to a plain text file.
3. Use Microsoft Word to open the text file you exported from EndNote.
4. When Word asks you to select an encoding option, choose "Other Encoding" and "Unicode (UTF-8)."
5. In Word, choose *File > Save As* and save the document with a new name, as plain text, and with Windows-default as the encoding option.

6. To import the saved file:

   With EndNote: Use the Refer/ BibIX import filter.

   With Reference Manager or ProCite: Use the RIS import filter.

Transferring Across Platforms

Transferring Libraries Across Platforms

EndNote X4 can read libraries created in versions 5 or later of EndNote for Windows or Macintosh.

If you plan to send or email an EndNote library to someone, remember to send all of the files found in your library's .DATA folder. For an easy way to compress all of your library files and folders into a single file, see Saving a Compressed Copy of a Library. You can then send the single, compressed file to the other user, and they can restore the filename.enl file and its associated .DATA folder.

From Windows to Macintosh

Any library created or updated with EndNote X4 for Windows can be used by EndNote X, X1, X2, or X3 for the Macintosh. No conversion is necessary, however you must make sure the name of the library includes the ". enl" extension (for example, Medicine.enl) and include the associated .DATA folder.

1. If you are on a network, simply copy the library from the PC to the Macintosh. Otherwise, use Windows Explorer to copy the library to a removable storage disk. Use your Macintosh to copy the library from the removable storage disk to the Macintosh. Make sure you also copy the DATA folder found in the same folder as the library.

   Note: If you plan to send an EndNote X4 library to another EndNote X or later user, there is an easy way to compress all of your library files and folders into a single file. See Saving a Compressed Copy of a Library.

2. Start the EndNote program on the Macintosh. (If you see a dialog prompting you for a reference library file, choose *Cancel.*)

3. ENL" extension, EndNote can display it. If the library does not have the ". ENL" extension as part of the file name, EndNote will not recognize it.

4. Select the library and click *Open*.

Once the library has been opened in EndNote on a Macintosh, it maintains the EndNote Macintosh icon and can be opened just like any other library created by EndNote on the Macintosh.

From Macintosh to Windows

Any library created or updated by EndNote X4 on a Macintosh can be used by EndNote X, X1, X2, or X3 for Windows. No conversion is necessary, however you should make sure the name of the library includes the ". ENL" extension (for example, Medicine.enl) and include the associated .DATA folder.

1. If you are on a network, simply copy the file from the Macintosh to the PC. Otherwise, use a file transfer utility to move the library from the Macintosh to a removable storage disk and then to the PC. Make sure you also copy the DATA folder found in the same folder as the library.

   Note: If you plan to send an EndNote X4 library to another EndNote X or later user, there is an easy way to compress all of your library files and folders into a single file. See Saving a Compressed Copy of a Library.

2. Start the EndNote program in Windows. (If you see a dialog prompting you for a reference library file, choose *Cancel.*)

3. From the *File* menu, select *Open* and then *Open Library.* Use the "Look in" list to navigate to the location of the library you want to open.

If your library does not have the extension ". ENL" or "*.LIB" it will not appear in the dialog. If that is the case, select *All Files *.** from the file type list at the bottom of the dialog, and you should be able to see your library.

4. Select your library and click *Open*.

Data Visualization

Data Visualization

Data Visualization (or Information Visualization) is the direct visual representation of selected features or elements of complex multi-dimensional text, image, sound, voice, video, or numerical data. Data visual analysis software provides tools to interact with data that has been visualized. Users with access to data visual analysis software, such as RefViz, can use EndNote's *Tools>Data Visualization* command to access EndNote data in a new way.

Data visualization tools, which allow for direct importing of EndNote files, give you the capability to combine and analyze numeric, text, categorical and sequence data from a variety of sources. Tools for clustering collections of text documents and combined data sets are also included.

To turn on the Data Visualization feature:

1. Make sure you have a Data Visualization software application installed on your computer (such as OmniViz, RefViz, etc.).
2. In the EndNote folder, start the CONFIGURE DATAVIZ application.
3. Follow the prompts to select the location of your Data Visualization program.
4. Click *Finish*.

The *Data Visualization* command should now be active on the Tools menu in EndNote.

Note: If you are running Windows Vista, you must have administrative access in order to use this utility and see your references with a data visualization tool.

To export data from your EndNote library to Data Visualization software:

1. Open an EndNote library.
2. Select all references.
3. Select the RefMan (RIS) Export output style.
4. From the Tools menu, select *Data Visualization*.

This launches your Data Visualization software to run a visualization of the text included in your library. Depending on the size of your library, a visualization may take several minutes.

Note: Data Visualization is most useful when most of your records contain information in the Abstract field.

Entering and Editing References

Introduction

Important Points About References

There are various ways to add references to an EndNote library. This topic, and the following topics, discuss how to type information into EndNote, edit EndNote references, and insert graphics and files.

See Quick Overview of Online Searching for information about connecting to online bibliographic databases and retrieving references directly into EndNote. General Importing Instructions describes how to import references from a variety of sources using EndNote's *Import* command.

Here is an overview of important aspects of EndNote references:

- Each EndNote reference stores the information required to cite it in a bibliography. Keywords, notes, abstracts, URLs and other information can be stored in a reference as well.
- Each reference added to a library is automatically assigned a unique record number that never changes for that reference in that particular library. EndNote uses these numbers to format papers. You cannot change these record numbers.
- 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.
- Forty-five **reference types** are already defined (such as Journal Article, Book, Conference Proceedings, etc.). Three additional Unused reference types are available so you can define your own. See the List of Reference Types.
- The **fields** (Author, Title, Year, etc.) displayed for each reference type can be modified or deleted. New fields can also be added, up to a total of 52 fields per reference, including the reference type name.
- The text of the references should remain as plain text unless a special font, size, or style of text is required for a specific term or character.
- The font used to display the text in references can be changed using the General Display Font preference.
- You can insert one graphic or file into the Figure field of a record, and the figure can be cited in Microsoft Word. See Inserting Figures. However, you can insert multiple files into the File Attachments field. See Linking a File to an EndNote Reference.
- References are automatically saved when they are closed; however, you may save a reference while editing the reference using the *Save* command on the File menu.

The Reference Window

The **Reference window** displays the contents of the reference. Each part of the reference is stored in its own field, and the type of reference is displayed below the title bar.

- The Reference Type list displays the type of reference that you are viewing, such as a journal article or a book.
- Click the double triangle icon to toggle between *Hide Empty Fields* and *Show Empty Fields*. Initially, EndNote displays all fields in a reference. Click *Hide Empty Fields* to view only those fields that contain data. This setting is remembered until you click the icon again.

- Click the left arrow (Previous Reference) or right arrow (Next Reference) buttons to close the current reference and open either the previous or next reference (based on the order the references appear in the Library window). All changes to the open reference are saved when you click these buttons.
- Resize the Reference window by clicking on the lower right window corner and dragging the window to the desired size. EndNote remembers the size and location of the last reference that you closed, so the next time you open a reference it will appear with the same dimensions and in the same location.
- Click the close button to close the reference, or type (or Ctrl+Shift+W to close all references at once). All changes are saved automatically when a reference is closed.
- Click in the scroll bar with the mouse to scroll through the information in the Reference window.
- Press the Tab key to move to the next field and select its contents. Shift+Tab selects the previous field.
- The first author's last name, the year, and the EndNote record number appear at the top of the Reference window in the title bar. This is the same information that is used for the temporary citations in word processing documents.
- Click the maximize or minimize buttons in the top corner to expand or minimize a Reference window. Click the restore button to restore the window to its original size.

The Window Menu

Any open library or reference is listed in EndNote's Window menu. The title of each open Reference window (that is, the author, year, and record number of a reference) appears in the Window menu, and it can be selected to bring that reference forward on the screen.

Previous and Next Reference Commands

When a Reference window is open, use the *Previous Reference* and *Next Reference* commands in the References menu to quickly browse through your references. The Reference window also includes arrow buttons to move to the previous or next reference.

When you choose one of these commands (or click the buttons), the content of the References window changes to display the information for the previous or next reference listed in the Library window.

This command has the same effect as closing the reference that is currently displayed and opening another reference, so any changes to the currently opened reference will be saved before EndNote switches to display another reference.

Changing the Display Fonts

By default, any text that you type or edit in EndNote is displayed in 12 point Arial font . You can change this to another font and/or size using the General display font option in EndNote's preferences.

The General display font changes the font used to display all other text that is typed into EndNote (such as in the Reference or Style windows). The General display font is also used for most of the previews and information panels in EndNote, as well as for bibliographies that are printed, exported, or copied directly from EndNote.

Changes made to the display fonts apply to all EndNote libraries opened on that computer. They do not affect the font used when you are formatting bibliographies in a word processing document. The normal font of the document is used for that. Changing the General display font simply changes the font that EndNote uses for its "Plain Font" and "Plain Size" settings. Deliberate font changes that you have made in your references are not affected by the display font.

To change the display fonts:

1. From the Edit menu, choose *Preferences* and click the *Display Fonts* option.

2. On each tab, click *Change Font*, then select a different font and/or size from the lists in the font dialog. Click *OK* to close the font dialog and see the example text displayed in the chosen font and size.

   Library: The Library setting determines the font and size of the references listed in the Library window.

   General: The General setting changes the font and size used to display most text that is typed into EndNote (such as in the Reference or Style windows). The General display font is also used for most of the previews and information panels in EndNote, as well as for bibliographies that are printed or copied directly from EndNote.

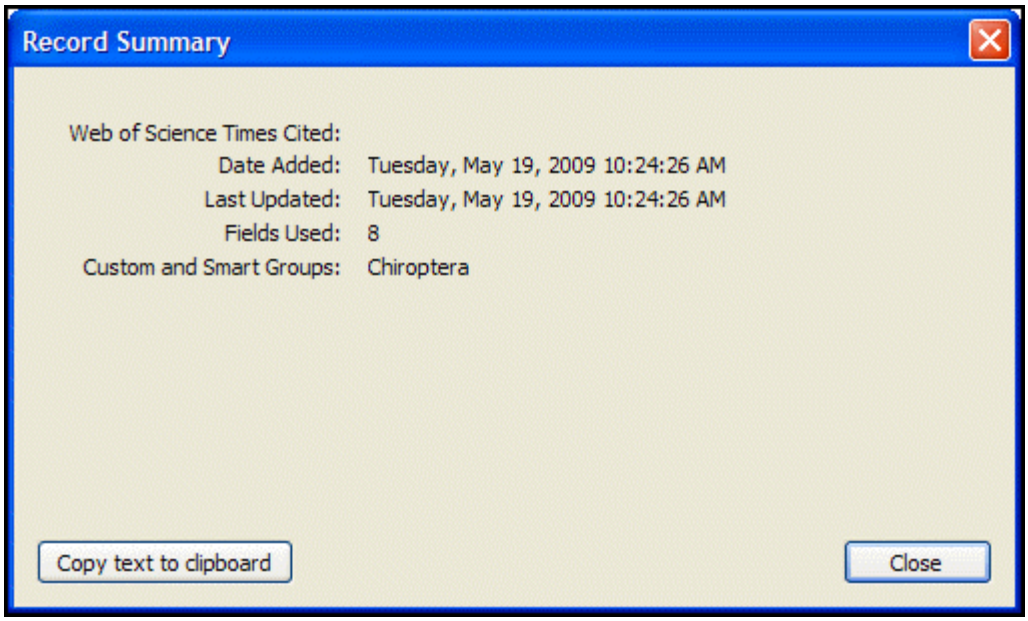
   Labels: The Labels setting determines the font and size used for the Reference window field labels.

   Search: The Search setting determines the font and size applied to user-entered text on the Search tab.

3. To see your changes in any EndNote windows that are currently open, click *Apply.* Click *OK* to save these changes and close the Preferences dialog.

Record Summary

To see a list of statistics about a reference, highlight the reference in the Library window, then go to the *References* menu and choose *Record Summary*.



If you wish to save and print this information, use the Copy text to clipboard button and then paste the text into a word processor document.

For a list of statistics about the library, see Library Summary.

Selecting References

To work with individual references (for example to copy, open, export or edit them), first select them in the Library window. The simplest way is to click on a reference in a reference list. That reference is then highlighted to indicate it is selected.

You can also select a reference by typing the first few letters found in the field by which the library is currently sorted. For example, if the library is sorted by the author field, type the first few letters of an author's last name to select the first reference by that author. If the library is sorted based on title, type the first few letters of the

title of the reference that you want to select. (When typing the letters to match a title, articles such as "a," "an," and "the" are skipped.)

To select multiple references:

- Hold down the Ctrl key while clicking on individual references. Press the Ctrl key and click on a *selected* reference to deselect that reference and retain the rest of the selection.
- Select a range of references by clicking on the first reference, then press the Shift key and click on the last reference of the range.
- You can also select a range of references by holding down the mouse button and dragging the mouse vertically across a range of references.
- Choose *Select All* from the Edit menu (Ctrl +A) to select all of the references showing in the current reference list. When all the references are selected, the *Select All* command changes to *Unselect All*.

See Showing and Hiding References to learn how to display only the selected references, or temporarily hide the selected references from view.

Opening, Closing, Saving, Deleting References

Opening References

Once you have references selected, any of the following actions opens them (a maximum of 10 references at a time):

- Double-click the selected reference(s).
- Press Enter .
- From the References menu, choose *Edit References* (Ctrl +E).

You can stop a series of selected references that are in the process of opening by pressing the Escape key (Esc) .

The Reference window that opens for each of the references is where you enter and edit the reference data. Modify this text just like you would edit a word processing document: select the incorrect text and retype it, or delete and add text as necessary. See Entering References for important information about entering reference data.

Closing References

To close a currently open reference, do any of the following:

Click in the close button on the Reference window.

From the File menu, choose *Close Reference* (Ctrl + W).

To close one reference and view the next or previous reference in the library, use the *Next Reference* and *Previous Reference* commands on the References menu (or the buttons in the Reference window). See Previous and Next Reference Commands.

Close all open references by holding down the Shift key while pressing Ctrl+W.

Note: All data in a reference is automatically saved when you close the Reference window.

Saving References

To save a reference that you have just created, or to save any changes made to an existing reference:

- Close the reference(s), or
- Choose *Save* (Ctrl +S) from the File menu.

If you Exit from EndNote while Reference windows are open, the references are closed and saved automatically.

Reverting References

The Revert Reference command on the File menu discards all changes made to a reference since it was last opened or saved. *Revert Reference* is not available after you close the reference.

To remove the very last change made to a reference, use the *Undo* (Ctrl +Z) command in the Edit menu before closing or saving a reference.

Deleting References

To delete references:

1. Select (highlight) those references you want to delete.
2. Do one of these, which moves the selected references to the Trash group:

- Drag the selected references and drop them on the Trash group.
- From the References menu, choose *Move References to Trash*.
- From the Edit menu, choose *Cut*, which also stores the references temporarily on the Clipboard.
- From the Edit menu, choose *Clear*.

3. When you are absolutely certain that you want to delete the references in the Trash, go to the References menu and choose *Empty Trash*.
4. You must confirm that you want to remove the references from the library.

Note: You cannot undo the *Empty Trash* command, so be sure you want to delete the reference(s) in Trash before dismissing the EndNote warning.

5. Display All References again to continue working in your library.

About the Trash group:

The Trash group contains references you have removed from the library by using any of the methods mentioned above. While the references are officially no longer in your library (they will not appear in any other group or reference list, they are not included in your reference count, and they cannot be searched or cited), they are not completely deleted until you go to the *References* menu and choose *Empty Trash*.

Until you choose *Empty Trash*, you can still drag references from the Trash group back to the All References group of your active library. Or, highlight a reference in the Trash group, right click on the reference, and choose *Restore to Library*.

If you do not actively choose the *Empty Trash* command, you will be prompted when you close the EndNote library.

Note: When you delete a reference, you delete its record number in that library forever. Even if you paste the reference back into the same library, it is assigned a new, unique record number. This may cause incompatibilities with older papers that have citations that use old record numbers. We strongly recommend that you *do not delete references that have been used in papers* that you might want to reformat later, and keep backups of your libraries!

Creating a New Reference

Creating a New Reference

To add a new reference to an open library:

1. From the References menu, choose *New Reference* (Ctrl +N). This opens an empty Reference window:
2. Choose a reference type from the Reference Type list at the top of the window.
3. Enter bibliographic data into each of the fields in the reference. For guidance, see Entering References. When you are finished, close the reference to save it and add it to the library.

Changing the Default Reference Type

By default, new references appear as Journal Article references. You may change this using the *Default Reference Type* option in the Preferences panel.

1. From the Edit menu, choose *Preferences*.
2. Click the *Reference Types* option in the list.
3. At the top of that *Reference Types* preferences panel, click the *Default Reference Type* list and choose the reference type that new references should use.

Choosing a Reference Type

When you create a new reference, that reference is assigned the default reference type. If you want to add a different type of reference, click the Reference Type list at the top of the Reference window, and select the reference type that you need.

Normally, you should select the reference type before entering information in the reference. However, you can change the reference type at any time, and the information you have entered is retained and transferred to the corresponding field for the new reference type.

In addition to determining how the reference is formatted in the bibliography, the reference type determines which fields appear in the Reference window. For example, a Journal Article reference would have fields for Journal, Volume, and Issue, whereas a Book would have fields for Editor and Publisher.

Customizing Fields and Reference Types

Fields can be removed, added, or renamed. You can also rename reference types. See Customizing Reference Types for instructions on removing, adding, or modifying fields for each reference type.

Tips for Choosing the Right Reference Type

Use **Book** for books written by one or more authors, and use **Edited Book** for books edited by one or more editors (whether they are books in a series or not).

Use **Book Section** for references to parts of edited or non-edited books (a chapter, for example, or one article in a published conference proceedings).

The **Conference Paper** reference type is best used for unpublished papers. Articles that are published as part of the comprehensive conference proceedings should be entered as **Conference Proceedings** references.

Use the **Electronic Article**, **Electronic Book**, or **Web Page** reference type for citing material from a Web page or FTP site. If you are citing a journal article that appears both online and in print, most style guides prefer that you use the print information and cite it as a regular journal article. Email discussions should be cited as **Personal Communications**, just like any other correspondence.

Use the **Chart/Table** reference type if you want to include an image and later insert that image as a table in Microsoft Word. Images in all other reference types will insert into Word as figures, which are listed and numbered separately from tables.

Entering References

Entering References

Bibliographic information (as well as keywords, notes, and other relevant information) is entered into separate **fields** in each EndNote **reference**. By storing the pieces of bibliographic data in different fields, EndNote can later rearrange the elements to conform to various bibliographic formats (such as APA or MLA).

Special bibliographic formatting and punctuation should *not be included* when you enter reference data into EndNote. For example, you do not need to put quotes around titles, italicize journal names, or include the abbreviation " Vol." along with volume numbers. Enter only the raw data, and leave the formatting to EndNote.

Note: There are a few exceptions to this punctuation rule, notably in the Author, Editor, and Edition fields.

A full set of key commands is available so that you can enter references without using the mouse. See keyboard commands.

For details about entering data into specific fields, see these topics:

Field Size Restrictions
Using Term Lists with Data Entry
Author and Editor Names
Year
Titles
Journal Names
Pages
Edition
Date
Short Title
Original Publication
Reprint Edition
Reviewed Item
ISBN/ISSN
DOI
Call Number
Label
Keywords

Notes and Abstract
URL (Uniform Resource Locator)
File Attachments
Figure and Caption

Field Size Restrictions

The Figure field can contain a single graphic.

All other fields can contain up to 64KB, or approximately 16 pages of plain text.

Using Term Lists with Data Entry

EndNote uses **term lists** for the Author and Editor names, Journals, and Keywords. Term lists can also be created for other fields. These lists are updated automatically as you enter new terms into these fields. The benefit of this is that the term lists also help with data entry. If you begin to enter a name, journal or keyword that you have used before in that library, EndNote will complete the term for you to speed up data entry.

To accept a term that EndNote has suggested, simply press Enter , Tab, or click in the next field. Terms that are new (that is, those that do not already appear in the corresponding Author, Journals, or Keyword term list) appear in red text.

A more complete discussion of EndNote's term lists is provided in Introduction to Term Lists.

Note: Both the "Auto-Update" and "Auto-Complete" term list features described here may be turned off using the Term Lists settings in the EndNote preferences.

Author and Editor Names

The following information about Author and Editor fields applies to the following "Generic" field names: Author, Secondary Author, Tertiary Author, and Subsidiary Author.

Always enter author and editor names *one name per line*. If an author's name is too long to fit on a single line, let it wrap to the next line as you type it.

Author names can be entered either with the last name followed by a comma and the first name, or the first name followed by the last name. Both are correct. However, note that if you have the "Suggest Terms as You Type" feature of the term lists turned on, EndNote suggests author names based on the assumption that the names are being entered with the last name first.

EndNote can abbreviate first and middle names, so for maximum flexibility enter whole names whenever possible. If you are entering initials instead of full names, be sure to type a period or a space between initials, (for example "Fisher, J.O." or "J O Fisher"), otherwise EndNote interprets the initials as a single name: "Jo."

See Additional Style Formatting Options for information about how EndNote can use style settings to format author names in bibliographies. For more information about term lists, see Introduction to Term Lists.

Using "et al." or Similar Abbreviations

Enter all author names for a particular reference. EndNote will truncate the list of authors with "et al." or "and others" as required by the bibliographic style. If you do not know all of the authors' names, then the last author should be "et al." or "and others" followed by a comma.

Anonymous Works

If a reference has no author, you should leave the Author field blank. Do not enter "Anonymous." The style that you use to format the bibliography determines how anonymous references are treated.

Note that if a work is published with "Anonymous" printed on the title page, most style guides request that "Anonymous" be entered as though it were the author name.

Corporate Authors

When entering corporate authors, put a comma after the name:

U.S. Department of Agriculture,

Apple Computer Inc.,

This ensures that the entire name is treated as a first name, so no name manipulation will be applied.

If your corporate author name includes a comma in the name itself, use two commas in place of the first comma:

University of California,, Irvine

EndNote treats this as a last name followed by a blank first name. Then, everything after the (blank) first name is appended, including a second comma in the name. The formatted result is the corporate name with the commas in place.

Complex Author Names

For multiple-word last names, like Charles de Gaulle, enter the name with the last name first, such as:

de Gaulle, Charles

Entering a name this way ensures that both words "de" and " Gaulle" will format as the last name.

Enter authors with titles, such as " Jr." or "III", as Last, First, Title. For example, "Alfred Smith Jr." must be entered as:

Smith, Alfred, Jr.

The text after the second comma will print exactly as entered.

Note: See the Sorting section of the EndNote preferences if you do not want EndNote to include prepositions (such as de, van, von, etc.) when it alphabetizes references in a bibliography.

Year

Normally, you should enter the four numbers of the year of publication, as in 2002. When appropriate, you may enter "in press," or "in preparation," or some other notation.

Note: When you transfer references from an outside source into EndNote, only valid dates are parsed and transferred. Text such as "submitted" or "in print" is ignored. However, you can manually type this information into the reference.

Titles

The following information about Title fields applies to the "Generic" fields Title, Secondary Title, Tertiary Title, and Alternate Title.

Enter titles without a period or any other punctuation at the end. Do not press the Enter key while typing titles into EndNote; allow long titles to just wrap to the next line. Although the EndNote styles can change the capitalization of titles, it is best to capitalize the title in the same way you would like it to be capitalized in your bibliographies.

Journal Names

The Journal field is automatically set up to work with the Journals term list. This means that the Journals list is updated as you add new journal names to your references, and EndNote will use this list to facilitate data entry by suggesting journal names as you enter them into the Journal field.

The Journal field (in the Journal Article reference type) can be used with the Journals term list to allow for multiple formats of a journal name to be used in your bibliographies, depending on the format required (see Creating Bibliographies with Journal Abbreviations). When the different forms of the journal name are entered into the Journals term list, all it takes to change the format of your journal names in a bibliography is one change in the style used (see Journal Names). All of the appropriate substitutions are made when the bibliography is created.

EndNote includes several predefined journal lists in the Terms folder. If you would like to use these lists, you should import them into your Journals list as described in Loading Supplied Journal Abbreviations.

The Alternate Journal Field

The Alternate Journal field is most useful when importing or retrieving references from an online source that provides two forms of each journal name (full and abbreviated). By importing both, you can easily update the Journals term list and use the correct form of the name without having to enter it yourself (see Updating a Journal List).

If you do not import from sources that include an alternate journal name, this field is probably not necessary for you to have in your Journal Article references. You can remove it by editing the Reference Types preference (see Customizing Reference Types).

Pages

Page ranges can be entered as complete (1442-1449) or abbreviated (1442-9) ranges. The style used to create the bibliography can change the page numbers to be either full or abbreviated page ranges, or show just the first page (see Page Numbers).

Do not use commas in the Pages field for page numbers in the thousands.

Edition

The text of the Edition field is not modified by EndNote for your bibliographies, so be sure to enter "1st," "2nd," and so on for this field if that is what you need in your bibliography.

Date and Auto Date Stamp

The Date Field

In the Date field of your references, enter dates as you would like them to appear in your formatted list or bibliography; EndNote does not reformat dates. The output style determines which date field prints in your bibliographic references.

Note: When you transfer references from an outside source into EndNote, only valid dates are parsed and transferred. Text such as "submitted" or "in print" is ignored. However, you can manually type this information into the reference.

The Auto Date Stamp Fields

Two Auto Date Stamp fields appear in the footer of each EndNote reference. The Added to Library and Last Updated dates are inserted when you save a new reference, and then the Last Updated date is reset each time you save changes to a reference. The date format of the Auto Date Stamp fields, such as “4/16/2009,” adheres to your default operating system settings.

You cannot edit either of the Auto Date Stamp fields, nor can you export or print these fields. However, you can display, search, and sort these fields just as you would any other EndNote field.

For references entered with EndNote version X1 or earlier, the “Added to Library” field is left blank and the “Last Updated” field displays the date of conversion to EndNote X4.

Short Title

Use the Short Title field to enter abbreviated versions of the regular title which should be used as part of an in-text citation or a footnote citation. This is a common request for many of the humanities styles which use a shortened form of the title in the citation to help identify which reference is being cited. For example, MLA typically lists just the author name and the specifically cited pages in the in-text citation:

(Perin 141)

But if there are multiple works by that author, MLA requires that the title, or a shortened form of it be added to the citation. If the full title of the reference is fairly long, such as "Burning the Midnight Oil: Tales from Working the Night Shift," you should enter an easily recognizable form of the title that starts with the first word on which the normal title would be sorted. For example:

(Perin, *Burning* 141)

If an EndNote style is configured to use the Short Title field, and that field is empty for a particular reference, the normal Title field is used instead.

Original Publication

Use the Original Publication field to enter any information about the original publication that you need to be included in the cited reference. For example, when citing a republished book you might want to include the original publication date, as well as any other supplementary information about the original publication (such as place published and publisher). Enter this information just as you would want it to appear in your formatted bibliography reference (including text styles and punctuation).

Reprint Edition

Use the Reprint Edition field for references that were originally published under a different title. The field should include the original title and year to indicate that this reference is a reprint of an earlier publication. Enter this information exactly as you would want it to appear in your formatted reference (including text styles and punctuation).

Note: This field is not intended to be used to indicate whether or not you have a reprint of the article on file. You may use one of the custom fields for that.

Reviewed Item

Use the Reviewed Item field for articles or chapters that are critical reviews of books, cinema, art, or other works. The contents of the Reviewed Item field varies depending on the type of review that you are citing, but typically you should enter the title of the reviewed work and the primary person responsible for it (author, artist, performer, etc.). Additional information about a production or performance may also be included. Enter the information exactly as you want it to appear in the formatted references (including punctuation and text styles).

ISBN/ISSN

ISSN (International Standard Serial Number) and ISBN (International Standard Book Number) are codes used to identify a particular publication. An ISSN number would refer to an entire journal (such as the Journal of Virology), and an ISBN would refer to a particular book.

These numbers help to identify a specific publication if you needed to order it or locate it. This field is also used for Report Number and Patent Number.

DOI

A DOI (Digital Object Identifier) is a unique ID for locating a digital version of a document, PDF, or image. It is most useful if you are importing reference data or retrieving references directly from an online source. (This field was formerly titled "Electronic Resource Number.")

Call Number

The Call Number field is used to store library call numbers. These are the codes that help you to locate a particular publication on the shelves in your library. When available, the EndNote connection files import the call number information into this field. If you do not plan to use this feature, you may remove the field (see Customizing Reference Types).

Label

The Label field can be used for many purposes, such as special in-text citations or reprint numbers.

Some citation styles require that citations include only part of the author's name, such as [SMIT 90]. EndNote cannot create this citation for you, but if you type " SMIT 90" into the Label field and use the Label field in your style's citation template, EndNote will insert the Label field into the citation.

If you do not need the Label field for citation purposes, it can be used as an additional field for categorizing references or storing reprint numbers. (Do not use EndNote's record numbers to number reprints because these numbers change when references are moved to different libraries. EndNote's record numbers cannot be assigned or changed by the user.)

Keywords

Use the Keywords field to store keywords that you want to associate with the reference. You can restrict a search to just the Keywords field, so the terms you enter into this field can be used to later retrieve the references when using EndNote's *Search* command.

The Keywords term list (which maintains a list of terms used in the Keywords field) can be set up to recognize semicolons (;), slashes (/), backslashes (\), and returns as the delimiters that separate individual keywords. If you would prefer to use other punctuation to separate your keywords, you may change these settings using the *Define Term Lists* command from the *Tools* menu.

Notes and Abstract

The Notes, Research Notes, and Abstract fields can each hold up to 64,000 characters, which is equivalent to about 16 pages of text. Use the Notes field to store personal reminders, such as the location of a quotation in a book or the quotation itself. Use the Abstract field for a brief description of the contents of the work.

URL (Uniform Resource Locator)

A URL (Uniform Resource Locator) is the term for the address used to locate a specific page of information with your Web browser.

To link a URL to a reference in your EndNote library:

1. Select a reference in the Library window and open the reference. Put your cursor in the URL field.
2. Type or paste a valid URL into the field. For example:

   http:// www.endnote.com

   or

   ftp:// ftp.cuteftp.com

The URL becomes a hyperlink (blue and underlined).

If you need to enter multiple links into the URL field, enter them one per line. Adding any other information along with the URL or path and filename may keep the Open URL command from successfully finding the desired site.

When a correctly formatted URL is entered into the URL field, the *URL>Open URL* command on the *References* menu can be used to launch a Web browser and take you to that site or file.

Some online reference databases include a URL for the full text of an article online. When importing or retrieving references directly from these sources, the URLs can import directly into this field to take advantage of the *Open URL* command. You can also store a URL to related information on the Web or other relevant material.

EndNote automatically recognizes URLs if they are entered with the correct prefix (such as "http://" or " ftp://") in any field. When recognized, they become clickable Web links and appear as blue and underlined text. Simply clicking on one of these links will open your Web browser and go to the address given. This feature is not specific to the URL field. See Linking References to Web Sites and Files.

File Attachments

Use the File Attachments field to store the path to PDF files (and other file types) on your hard drive.

Note: Use the Figure field to attach a graphic or file that you want to insert into a Word document with Cite While You Write.

To link a file to a reference in your EndNote library:

1. Select a reference in the Library window, or open the reference for editing.
2. References menu, choose *File Attachments* > *Attach File*.
3. On the file dialog, select a file to link to the selected (or open) reference.

4. Note the check box along the bottom titled, "Copy this file to the default file attachments folder and create a relative link." This gives you the option to:

- Select the check box to copy the original file and place the copy in the DATA\PDF folder that is part of your EndNote library.
- Deselect the check box to always have EndNote look in the original folder for the inserted file.

For more information about this option, see Selecting a Relative Path or an Absolute Path for File Attachments.

5. Click *Open*.

EndNote will display an icon indicating the type of file inserted. You can insert additional files into the same File Attachments field.

Note: Another way to link a file to the File Attachments field is to drag and drop the file onto the reference in either the Library window or the Reference window. Whether the file is saved with the database or is linked with an absolute path is determined by the default file attachment setting. See URLs & Links.

Note: In order to maintain cross-platform compatibility, any of the following characters in a filename will be replaced by an underscore when EndNote saves a copy of the file in the DATA\PDF folder with a relative path.

These characters are replaced with an underscore	
\	(back slash)
/	(forward slash)
:	(colon)
*	(asterisk)
?	(question mark)
"	(quotation mark)
<	(less than)
>	(greater than)
|	(vertical bar)

For more information, see Linking a File to an EndNote Reference and Opening a Linked File or URL.

To automatically search online to locate and attach the full text of a referenced document, see Finding Full Text for a Reference.

Figure and Caption

The Figure field can contain a graphic or file attachment. See Inserting Images.

The Figure field is included by default for all reference types, but you can remove it from any reference type or rename it in any reference type.

Note: Each reference can contain only one graphic or file attachment.

The figure itself is copied to the [library name]. DATA folder found in the same folder as the library file.

A related Caption field appears directly under the Figure field in a reference. Use this field for a short description of the image or file.

Cite While You Write allows you to insert the figure and its caption into a word processing document. See Inserting and Formatting Figures and Tables. Figures in most reference types will insert into Word as *figures*. The only exception is the *Chart or Table* reference type; use the *Chart or Table* reference type if you want to

include an image and later insert that image as a *table* in Microsoft Word. Tables are listed and numbered separately from figures in Word.

Font, Size, and Style

EndNote is designed to produce bibliographies that automatically use the font and size of the text in your word processing documents. Normally, when you type text into an EndNote reference, it is entered in a default Plain font, size, and style, which means that your references follow the font settings in your paper.

If any fonts, sizes, or styles other than the default are entered into your library, they will appear in your bibliography regardless of the font of your paper. For example, you can italicize species names, add a superscripted number, or enter Greek characters such as ß.

To apply font or text styles, select the text to be changed and then choose the desired font, size, or style from the Edit menu or the toolbar .

Note: If the *Font, Size,* and *Style* options are dim, it is either because you are not in an editing window (such as a Reference or Style window), or you have not selected (highlighted) any text to change. If a specific option is not available, the particular font selected may not support the option you want

Plain Text

The *Plain Text*, *Plain Font*, and *Plain Size* commands on the Edit menu or on the *Text Style* toolbar remove overriding fonts, text sizes, or text styles from the selected text in a reference or a Style window.

When EndNote creates a bibliography, text in Plain Font and Plain Size uses the font and size of your paper. To use these commands, first select the text you want to change, and then choose *Plain Text*, *Plain Font*, or *Plain Size* from the Edit menu or the toolbar.

The default font used to display EndNote's "Plain Text" is the default font of your operating system, but it can be changed using the *General* font option in the *Display Fonts* section of the EndNote preferences. (Choose *Preferences* from the *Edit* menu and click the *Display Fonts* option.) The General font setting changes the font in which the references are displayed but does not affect the font of a bibliography created for a word processing document.

Cut, Copy, Paste Text in the References

The *Cut*, *Copy,* and *Paste* commands in the Edit menu can be used to move text from one field in a reference to another field by selecting and copying or cutting the text and then pasting it in the desired location. You can also *Copy* and *Paste* text from a field in an EndNote reference to your word processor. Similarly, you can *Copy* text from a word processing document and *Paste* it into a reference. If it is important to paste the text along with the fonts and text styles, use the *Paste with Text Styles* command in the Edit menu. The regular *Paste* command does not include font, size, or text style information when pasting into EndNote from another program. Avoid pasting unwanted fonts and text styles into EndNote references because those fonts and text styles will carry through into future bibliographies.

Using Drag-and-Drop Within a Reference

Text may be moved around within a reference by selecting the text and then dragging and dropping it in a new location. When text is moved this way *within* a reference, it is moved from one location to another. When it is dragged from one reference to another reference or to another program (such as your word processor), it is *copied* and therefore not removed from the reference.

To drag-and-drop text:

First select the text of interest. Then click on the selection, and keep the mouse button pressed while you drag the text to another location. When the cursor is positioned in the right place, release the mouse button to "drop" the text there.

Copying and Pasting Complete References

In addition to copying and pasting text between fields, EndNote can *Copy* and *Paste* entire references between libraries.

To use the *Copy* and *Paste* commands:

1. Select one or more references in the Library window (hold down the Ctrl key to select multiple references or the Shift key to select a range of references). Do not open the references.
2. Choose *Copy* (Ctrl +C) from the Edit menu and those references are copied to the Clipboard.
3. Open another EndNote library and choose *Paste* (Ctrl +V) from the Edit menu to paste directly to the Library window. The references you copied are pasted into the library and sorted correctly with the existing references.

Copying references using drag-and-drop:

An easy way to copy references between libraries is to use the drag-and-drop functionality. Simply select the references you want to copy, click on any part of the selection, and use the mouse to drag them to another open library. Release the mouse button when the cursor is over the destination library, and all of the selected references will be copied into the library.

If you need to copy all of the references in one library to another library, you can also use the *Import* command to directly import one library into the other.

Note: Any time you copy a reference and paste it into another library, or import a reference into another library, the reference is assigned a new record number in the destination library.

Entering Several Articles from the Same Source

Use a reference "template" to facilitate entering a series of references that have some information in common (such as various sections from one book, or a number of papers presented at the same conference). The template you create is an incomplete EndNote reference with just the common information entered into it.

To create a reference template:

1. From the References menu, choose *New Reference*.
2. Enter all of the bibliographic information that the references have in common (such as the year, book title, publisher, and city for different sections from one book).
3. Close the reference when you are finished. It remains selected in the Library window.
4. Choose *Copy* (Ctrl +C) from the Edit menu to copy it.
5. Use the *Paste* (Ctrl +V) command to paste the reference several times, to create as many partially-filled references as you need. You should paste directly to the Library window—do *not* open a new reference and choose *Paste*.
6. Select all of the partially-filled references that you just created and edit them (double-click them, press Enter , or type Ctrl +E to open up to 10 selected references at one time).

Complete each of the individual references. Close each reference as you complete it. and save them by pressing Ctrl +W.

Entering Special Characters

Entering Special Characters

EndNote references can include special characters, including characters with diacritics, and Greek, mathematical, and typographical symbols. Diacritical characters are a part of standard Windows fonts, while most symbols can be entered in the Symbol font.

EndNote uses Unicode to encode special characters, so that data can be easily translated between platforms, programs, and languages.

EndNote uses the default language setting set by your operating system. If the characters you wish to use require installing a different language pack, see Displaying Extended/Special Characters.

Special characters can be entered into EndNote using any of these text-entry methods:

- Type the character on the keyboard (if the character is part of the language supported by the keyboard).
- Copy the character from another Windows program, and paste it into your EndNote library.
- Use the Character Map program supplied with Windows for this purpose.

Diacritical characters can be entered into EndNote references and into EndNote term lists. If you frequently use certain diacritical characters, or words that include diacritical characters, you can store them in a term list and then choose them from the list when entering references. See Introduction to Term Lists.

Note: If characters do not appear as they should in EndNote, see Displaying Extended/Special Characters .

Using Character Map

The Character Map program (CHARMAP.EXE) is supplied with all versions of Windows. Both diacritical characters and symbols can be entered using the Character Map:

To use the Character Map program:

1. From the Windows *Start >Programs* menu, choose *Accessories*, then *System Tools*, then *Character Map*.
2. Select the *Symbol* font, if necessary. (Other fonts will revert to the Typing Display Font when pasted in EndNote.)
3. Double-click the character(s) you need.
4. Click the *Copy* button to copy the characters to the Clipboard.
5. Return to EndNote, position the cursor in a reference, then select *Paste* from the Edit menu to paste the characters.

Or, with both your EndNote reference open and Character Map open, you can click on a character in Character Map and then drag-and-drop it into your EndNote reference.

Note: The Character Map may include some Unicode characters that will not work in your selected font. If you insert a character that is not recognized, it will appear in EndNote as a box.

Inserting Figures

Inserting Figures

EndNote extends the organization of reference information by including the ability to embed graphics and files in an EndNote library and link them to papers. You can insert a graphic, figure, or file into the Figure field of any EndNote reference. See Inserting Graphics and Files.

Note: While the Figure and Caption fields are included by default for all reference types, you can remove them at any time if you do not intend to use them and they are just taking up space. See Adding and Deleting Reference Types.

Once you have a figure in your EndNote reference, Cite While You Write allows you to insert the figure and its caption into a word processing document. See Inserting and Formatting Figures and Tables for more information about using images with Cite While You Write.

Selecting the Appropriate Reference Type

You can insert a graphic or file into the Figure field of an EndNote reference. Depending on the reference type, the field may be labeled Figure or have a custom label assigned by you.

By default, the Figure and Caption fields are included in all reference types. So, while a reference to a journal may contain primarily bibliographic information, you can also include an illustration that appeared with the journal article.

The Figure, Chart or Table, and Equation reference types can be used specifically to catalog images and files, and may contain minimal reference information.

Note: Figures in the Chart/Table reference type are inserted into Word as tables, and are labeled and numbered separately from the figures found in all other reference types.

To add or remove the Figure and Caption fields from a reference type, go to the *Edit* menu, choose *Preferences*, and select *Reference Types*. For more information about modifying reference types, see Customizing the Reference Types.

Inserting Graphics and Files

Notes about inserting graphics and files into the Figure field:

Always use the *Figure>Attach Figure* command to insert graphics and other files into the Figure field. If you simply use *Copy* and *Paste*, System settings are used and you could ultimately lose colors and other attributes from the original file.

Each EndNote reference can contain only one graphic or file attachment in the Figure field. If you insert a second graphic or file, it will *replace* the first one. The previous figure is deleted from the DATA folder. See Storing and Sharing Figure Files for more information about the DATA folder.

After inserting a graphic, you should always type Caption text into the Caption field, particularly if you intend to later insert the figure into a Word document. The Caption will label the graphic in the figure list at the end of the Word document. The Caption also helps you search for the figure.

You can insert a figure only into a reference that contains the Figure field. If you need to add the Figure field to a reference type, see Customizing Reference Types.

In order to maintain cross-platform compatibility, any of the following characters in a filename will be replaced by an underscore when EndNote saves a copy of the file in the DATA folder.

These characters are replaced with an underscore
\ (back slash)

/	(forward slash)
:	(colon)
*	(asterisk)
?	(question mark)
"	(quotation mark)
<	(less than)
>	(greater than)
|	(vertical bar)

To insert a graphic (picture) or other file into the Figure field:

1. With the reference open for editing, go to the References menu and choose *Figure>Attach Figure*. (The *Attach Figure* command is also available on the toolbar .)
2. Click *Choose File* to display a file dialog.
3. Locate the graphic file and *Insert* it. EndNote recognizes *at least* these graphic file types:

   Windows Bitmap - BMP
   Graphics Interchange Format - GIF
   JPEG File Interchange Format - JPEG
   Portable Network Graphics - PNG
   Tag Image File Format - TIFF

   Valid picture files are those that Microsoft Word recognizes as pictures.

   EndNote also recognizes at least these other file formats:

   Audio files (WAV, MP3)
   Microsoft Access files
   Microsoft Excel files
   Microsoft Power Point files
   Microsoft Project files
   Microsoft Visio files
   Microsoft Word files
   Multimedia files (MOV, QuickTime)
   Technical drawing files
   Text files (TXT, RTF, HTML)

4. Then, on the Attach Figure dialog, click *OK* to copy the file to your EndNote record.

A graphic appears as a thumbnail within the reference.

Other types of files will appear as an attachment, with the program icon and filename. (If the application used to create the document is not available on your system, the icon simply gives generic Windows file information.)

Double-clicking on the thumbnail or file icon will launch an associated application to open the file, with the same effect as if you had double clicked the file on your computer desktop.

Entering a Caption

A related Caption field appears directly under the Figure field in a reference. Use this field for a short description of the image or file. The Caption field allows you to easily search for figures.

If you insert an EndNote figure into a Word document with Cite While You Write, the corresponding caption appears either above or below the figure in your paper (the placement is determined by the current output style).

Opening the Figure File

Double-clicking on a graphic or file icon in the Figure field of a reference will launch an associated application (determined by the file type and your operating system) and open the file for viewing or editing. It is the same as if you had double clicked on the figure file on your computer desktop. Any changes to the file are saved for this EndNote reference.

When you double click on a figure file such as a GIF file, Windows will look for an image viewer like Paint or Photo Viewer to preview the image. The program used to create the file may not open.

Storing and Sharing Figure Files

When you insert a figure, EndNote copies the figure file and places the copy in a [library name] .DATA folder, which is found in the same folder as the main library file. The copied figure file is specifically linked to a single EndNote reference.

Note: Simply putting a figure file into the DATA folder does not link it into a reference. You must use the *Figure* > *Attach Figure* command.

If you move your library to a different computer, or if you want to share your library with someone, remember to always copy the .DATA folder along with the library.

Editing Figure Files

To edit a figure stored in an EndNote reference, open the reference and double click on the figure icon. This launches an associated application to open the file for editing. See Opening the Figure File.

Editing changes are made to the file stored in the library's DATA folder for this reference, and not to the original figure file that was inserted.

Note: Never rename figure files within the DATA folder. EndNote assigns each figure a unique name that helps link it to a specific reference.

Deleting or Replacing Figure Files

To delete a figure from an EndNote reference:

1. Open the EndNote reference, scroll to the Figure field, and select the figure icon.
2. Press the Delete key or use your mouse to right click and select *Clear*.

Deleting a figure from the reference also deletes it from the .DATA folder.

Note: If you insert the same figure in two different references, EndNote stores two copies of the figure in the .DATA folder. Deleting the figure from one of the references will not affect the other reference.

To replace a figure in an EndNote reference, you can do one of these:

Open the EndNote reference and *Attach* the new figure. The existing figure is deleted from the DATA folder and is replaced with the new figure.

Delete the old figure from the reference, and then *Attach* the new figure.

Converting from Figures to File Attachments

You can move a linked file from the Figures field to the File Attachments field in a reference. Keep in mind that only figures stored in the Figures field can be cited in Microsoft Word with Cite While You Write.

Earlier versions of EndNote did not include a File Attachments field. You may have linked a file to the Figures field, and later decided that you really wanted to link the file to the File Attachments field.

To convert file links from the Figures field to the File Attachments field:

1. In a reference list, highlight the reference(s) you wish to change. Or, open a specific reference for editing.
2. From the References menu, choose *Figure* and then *Convert Figures to File Attachments*.

Linking to Files and Web Sites

Linking References to Web Sites and Files

EndNote includes a URL field and a File Attachments field that you can use to link URLs and disk files to EndNote references.

Linking a URL to an EndNote Reference
Linking a File to an EndNote Reference
Selecting a Relative Path or an Absolute Path for File Attachments
Removing a Linked File from File Attachments
Opening a Linked File or URL
Finding Full Text for a Reference

Linking a URL to an EndNote Reference

What is a URL?

"URL" stands for "Uniform Resource Locator" and is a common term for the "address" used to identify the location of an item online. Most often, URLs refer to Web pages, such as this example of the EndNote Web page:

http://www.endnote.com

URLs can also be used to identify the location of FTP (File Transfer Protocol) sites.

To link a URL to a reference in your EndNote library:

1. Select a reference in the Library window and open the reference. Put your cursor in the URL field.
2. Type or paste a valid URL into the field. Two examples:

   http://www.endnote.com

   ftp:// ftp.cuteftp.com

The URL becomes a hyperlink (blue and underlined).

For more information about linking to a URL, see URL (Uniform Resource Locator).

Linking a File to an EndNote Reference

You can link a file on your computer—such as a graphic, a word processing document, a spreadsheet, or a PDF file—to an EndNote reference.

The File Attachments options are available only when a single reference is selected in the Library window, or when you are editing a reference.

Note: The File Attachments commands are available both from the *References* menu and from the right click context-sensitive menu.

To link a file to the File Attachments field in a reference:

1. Select a reference in the Library window, or open the reference.
2. From the References menu, choose *File Attachments>Attach File*.
3. On the file dialog, select a file to link to the selected (or open) reference.
4. Note the check box along the bottom titled, "Copy this file to the default file attachments folder and create a relative link." This gives you the option to:

   Select the check box to copy the original file and place the copy in the DATA\PDF folder that is part of your EndNote library.

   Deselect the check box to always have EndNote look in the original folder for the inserted file.

   For more information about this option, see Selecting a Relative Path or an Absolute Path for File Attachments.

5. Click *Open*.

EndNote will display an icon indicating the type of file inserted. You can insert up to 45 files into the same File Attachments field.

Note: Another way to link a file to the File Attachments field is to drag and drop the file onto the reference in either the Library window or the Reference window. Whether the file is saved with the database or is linked with an absolute path is determined by the default file attachment setting. See OpenURL/PDF.

Note: In order to maintain cross-platform compatibility, any of the following characters in a filename will be replaced by an underscore when EndNote saves a copy of the file in the DATA\PDF folder with a relative path.

These characters are replaced with an underscore	
\	(back slash)
/	(forward slash)
:	(colon)
*	(asterisk)
?	(question mark)
"	(quotation mark)
<	(less than)
>	(greater than)
|	(vertical bar)

To link a file to any field in an EndNote reference:

1. Open the reference.
2. Type or paste, into any text field, the path and filename you wish to link. For example:

   file:///C:/Documents/Word%20Tips.pdf

EndNote will display the full path to the file. The path and filename become hyperlinked— blue, underlined text—which you can click to open the file.

Note that spaces in local folder and file names are indicated with "%20."

Selecting a Relative Path or an Absolute Path for File Attachments

When you link a file to the File Attachments field in a reference, you have the option of saving a relative path to the file, or an absolute path to the file.

What is a Relative Path versus an Absolute Path?

When you insert a link to a file with the *File Attachments>Attach File* command from the *References* menu, the file dialog includes a check box titled, "Copy this file to the default file attachments folder and create a relative link."

Relative Path (check box selected)

When the check box is selected, EndNote makes a copy of the original file and places it in the DATA\PDF folder that is part of your EndNote library. This saves the file as a "portable link" that can move as part of the library. EndNote will always be able to access the file, even when you share your library with a colleague (always include the complete DATA folder along with the . ENL file). However, if you edit the original file on your computer, those changes will not be reflected in EndNote. You would need to clear the file from your EndNote reference and reinsert the file.

Absolute Path (check box blank)

When the check box is blank, EndNote will use the complete path and filename to look in the original folder for the inserted file. This can be helpful if you plan to edit the original file, and you want those changes reflected when you access the file from within EndNote. However, if you ever move the file from the original folder, EndNote will not be able to access it unless you clear the file from your EndNote reference and reinsert it from the new folder location. If you send your library to a colleague, the file will not be available.

How Can I Tell Which Type of Path Was Used?

Open a reference that contains a linked file in the File Attachments field, and hold your mouse pointer over the file icon in the File Attachments field. EndNote will display a tooltip with the full path and filename of the linked file. If the file was linked with a relative path, only the filename will appear, as a copy of the file is stored in the library's DATA\PDF folder.

You can also determine which type of path was used by previewing the File Attachments field. Use an output style such as Show All Fields, which includes the File Attachments field. In the preview, file attachments appear as:

Absolute Path:

file://C:\Documents and Settings\All Users\Documents\EndNote\Filename.PDF

Relative Path:

internal-pdf://Filename-3869284362/ Filename.PDF

Selecting a Default Setting for the Path

Since you likely will want all of your linked files treated the same way, you can select a default setting for the check box titled "Copy this file to the default file attachments folder and create a relative link." You can change the default setting from the Preferences panel. See URLs & Links Preferences.

You still have the option to override the default setting each time you insert a file into the File Attachments field.

Converting Absolute Paths to Relative Paths

If you are working with a library that was created with a version of EndNote prior to version X, all of your existing linked files are saved with absolute paths. You can easily change your absolute paths to relative paths, which will allow you to easily share your library, along with linked files, with colleagues.

To convert absolute paths to relative paths:

1. Before you begin, please back up your library. This change cannot be reversed.
2. In the Library window, highlight the references you wish to modify.
3. References menu, select *File Attachments>Convert to Relative Links*.

For each selected reference, EndNote locates each file linked into the File Attachments field, and copies those files into the DATA\PDF folder for the library.

Inserting the Same File Again

If you try to insert a link to the same filename again in the same reference, your results are different depending on whether you are inserting files with a relative path or an absolute path.

Relative Path: Because the relative path always points to the library's DATA\PDF folder, a message will warn you that you cannot insert the same file again with the same name. You have the option to either replace the current link or give the newly linked file a new name.

Absolute Path: Because you could have several absolute paths pointing to the same filename in different folders, it is possible to link to the same filename numerous times. When you hold your mouse pointer over each file icon in the File Attachments field, the tooltip will display the full path and filename.

Saving a Copy of an Attached File

Whether an attached file is saved with a relative path in a library's DATA\PDF folder, or with an absolute path to a specific location, you can save a copy of the attached file to any location.

To save a copy of an attached file from an open reference:

1. Open and view the reference.
2. Scroll to the File Attachments field and highlight the file icon for the file you want to copy.
3. From the References menu, select *File Attachments* and then *Save As*. (Or use the right -click menu to select *File Attachments* and then *Save As*.)
4. Use the file dialog to choose a folder, enter a file name, and *Save* the file.

To save a copy of an attached file from a reference list:

1. Highlight the reference in the list.
2. From the References menu, select *File Attachments* and then *Save As*. (Or use the right -click menu to select *File Attachments* and then *Save As*.)
3. Use the file dialog to choose a folder, enter a file name, and *Save* the file.

Note: From a reference list, if more than one file is attached to the reference, only the first one is saved to disk.

Removing a Linked File from File Attachments

Before you remove a linked file, please make sure you have a backup of the original file. This process cannot be undone.

To remove a linked file from the File Attachments field:

1. Open the reference for editing.
2. Scroll to the File Attachments field and highlight the file icon you wish to remove.

Note: You can hold your mouse pointer over the file icon in the File Attachments field to display the path and filename of the linked file.

3. From the Edit menu, select *Clear*.

If the file was linked with an absolute path, the File Attachments field no longer points to the file. The original file remains intact.

If the file was linked with a relative path, that file is deleted from the library's DATA\PDF folder, and the File Attachments field no longer points to it. You will not be able to reinsert the link unless you have the original file stored elsewhere on your computer.

Opening a Linked File or URL

Once a valid, hyperlinked URL or path and filename appear in a reference, you can open the reference and click the hyperlinked text or icon to open the linked URL or file.

Or, from the *References* menu, use the *URL>Open URL* or *File Attachments>Open File* command to look specifically in the URL field or File Attachments field to open the Internet site or linked file.

You must have the necessary program installed on your computer in order for EndNote to open a file created by another program. For example, to open a PDF file, you must have Adobe Acrobat, Adobe Acrobat Reader, or another program that can read PDF files installed on your computer.

Similarly, EndNote does not include a Web browser. If you do not already have a browser installed, you will need to install one before using this feature to open a link to a Web site.

Using the *Open Link* and *Open File* commands

The *URL>Open URL* (Ctrl +G) and *File Attachments>Open File* (Ctrl +Alt+P) commands on the *References* menu can be used to launch a URL or open a linked file entered into an EndNote reference under the following conditions:

> When just one reference is selected in the Library window, the *Open URL* command opens the first URL that is listed in that reference's URL field. The *Open File* command opens the first linked file that is listed in that reference's File Attachments field.
>
> When multiple references are selected, EndNote checks the URL or File Attachments field in each of the selected references (in the order listed), and opens the first link it finds.
>
> If you need to enter multiple links into the URL field of one reference, enter them one per line. EndNote will open the first link in the field when you choose *Open URL* or *Open File*. If you have multiple links, you can click on any one of them to activate the link. (We recommend that you enter multiple URLs on separate lines. However, if more than one URL is entered on a single line, separated by semicolons, hold down the Alt key while you click on the URL you wish to open.)

To open a linked file or Internet site from the URL field:

You could open the reference and click on the hyperlink found in the URL field. Or,

1. Select or open a reference in the Library window.
2. From the *References* menu, choose *URL>Open URL* (Ctrl +G).

The Open URL command opens the linked URL with your default browser, or opens a linked file with the appropriate program.

To open a linked file from the File Attachments field:

You could open the reference and click on the file icon found in the File Attachments field. Or,

1. Select or open a reference in the Library window.
2. From the *References* menu, choose *File Attachments>Open File* (Ctrl +Alt+P).

The *Open File* command opens the linked file with the appropriate program.

If the file was linked with a relative path, EndNote looks in the library's DATA\PDF folder to find the file. If the file was linked with an absolute path, EndNote looks for the file in the original folder from which it was inserted.

Note: Please see Selecting a Relative Path or an Absolute Path for File Attachments for information about the difference between a file linked with a relative path and a file linked with an absolute path.

Spell Checking

Spell Checking

To begin using EndNote's spell checker, you must have an open record as the active window. If the active window does not display an open record, the spell check command is disabled.

If text is highlighted in the active record, that selection is checked first, and then you are prompted to check the rest of the record. If there are other open records, you are then prompted to check those records.

EndNote's spell checker can check spelling accuracy in all fields except the Author fields (Author, Secondary Author, Tertiary Author, Subsidiary Author, and Translated Author) and the URL, Figure, and File Attachments fields.

Starting Spell Check

To start spell checking:

1. Open the record(s) you wish to check.
2. (Optional) If you want to check only a portion of the text, highlight only that text.
3. From the Tools menu, select *Spell Check*.

   Note: These are other ways to start spell checking: right-click the mouse and select *Spell Check* from the contextual menu, or click the *Spell Check* toolbar button.

4. If EndNote finds a word that is not found in the selected dictionaries, it displays a Check Spelling dialog.

The Check Spelling dialog works just like a spell checker in a word processor. For a complete description of each button on the Check Spelling dialog, click the *Help* button.

Spell Check Options and Dictionaries

You can access Spell Check Options and Dictionaries in two ways:

- From the Edit menu, select *Preferences*. At the bottom of the left column, click on *Spell Check*. An *Options* button and a *Dictionaries* button appear.
- Start Spell Check. When EndNote detects a misspelled word, the Spell Check dialog appears. An *Options* button and a *Dictionaries* button are available on the dialog.

For information about the Spell Check Options and Dictionaries preferences, including a list of dictionaries supplied with EndNote, see Spell Check Preferences.

Changing Text in References

Changing Text in References

Global editing commands make it easy to keep your reference data consistent: *Change Text* is available from the Edit menu, while *Change and Move Fields* is available from the Tools menu.

The Change Text command searches for text in your library, and either deletes that text or replaces it with other text that you specify. The Change Fields command modifies any field in your library by either inserting text at the beginning or end of the field, replacing all contents of the field with different text, or deleting the contents of the field. The Move Fields command moves the entire contents of a field to a different field.

Note: Be sure that you have a current backup of your library; these operations cannot be undone with the *Undo* command.

Common Uses for Change Text, Change Field, and Move Field

Correcting consistently misspelled words or names.

Use *Change Text* to search for the misspelled term and replace it with the correct spelling.

Updating author's names.

There may be variations of an author's name in your data. For example, "Joe Cool", "Joe A. Cool", "J. A. Cool.", etc. Since some styles prefer whole names and others abbreviated first and middle names, it is best to update names to full names and leave the work of abbreviating to the EndNote styles.

Marking the result of a search for easy retrieval.

If you have developed a complex search to locate a set of references, use *Change Fields* to add a unique keyword to those references, so that the next time you want to retrieve that set, you can just search for the keyword.

Cleaning up your keywords.

You can add a keyword to a group of references using *Change Fields*. Use *Change Text* to replace a term with a new one. If there is a keyword that you no longer want in your references, use *Change Text* to search for that text and replace it with nothing, thereby deleting it (you might also want to open your term list and delete it from there so that you do not use that term again).

Dating or labeling a set of imported references.

It can be useful to add the date or source of data to a batch of newly imported references. Only the imported references are "showing" in the Library window after importing. At this point, use *Change Fields* to add a word or phrase to any field in just those references.

Moving fields of information in a set of imported references.

Maybe your import filter or connection file consistently sent Note information to the Abstract field. Use *Move Fields* to cut all information from the Abstract field and move it into the Note field. (Don' t forget to update your filter or connection file so it directs information to the correct field next time!)

Change Text

Use the *Change Text* command to find text in your references and replace it with other text. Changes can be restricted to a particular field in your references, and you can also apply "Match Case" and "Match Words" restrictions.

Note: The *Undo* command cannot be used to undo the results of the *Change Text* command. Make sure you have a backup before making changes.

To change any text in your references:

1. Decide which references you want EndNote to scan when it looks for text to change. Make sure only those references are showing in the Library window (use *Show All References*, *Hide Selected References*, *Show Selected References*, or *Search Library* commands to control which references are showing).

2. From the Edit menu, choose *Change Text*.
3. From the In Field list, select the field to be searched
4. In the "Search for:" box, type the text to be changed.

   To enter a Carriage Return or Tab in the text box, use the *Insert Special* button (Alt+S) .
5. Change the "Match Case" or "Match Words" settings if necessary.

   By default, the "Match Words" option is always selected. If you change this setting, pay close attention to whether or not the term you are changing could appear as part of another word or in a different context depending on the capitalization. **This operation cannot be undone.**
6. In the "Change the text to:" box, type the text that should replace the original text.

   To enter a Carriage Return or Tab in the text box, use the *Insert Special* button (Alt+S) .
7. Select the "Retain Capitalization" option to maintain the same capitalization as the text being replaced.

   "Retain Capitalization" should be selected if replacing a term that might appear with different capitalizations. For example, any word may have its first letter capitalized if it is the first word in a title, but may also appear in all lowercase in other places. Do not choose "Retain Capitalization" if you are replacing an acronym with its unabbreviated version.
8. Click *Change* to search the showing references for the specified text and replace it with the new text. Before replacing any text, EndNote has you verify the change. The dialog EndNote presents provides this information:

- Which references were searched
- What text will be replaced
- How many references were found to include the text in the specified field
- What text will replace it

7. Click *OK* if all of those items are correct. EndNote replaces the text and displays the number of references that were changed.

Important Points About the *Change Text* Command

- The *Change Text* command applies only to the references showing in the Library window.
- When using *Change Text*, the new text adopts the text style of the first character of the text being replaced. For example, if you replace an italicized word, the new text will also be italicized. If only the first term that you are replacing is italicized, as in *" Thecideid* genus" then all of the replacement text will be italicized: *" Thecideid Varigata genus.*"
- If you need to search for text and then *delete* it, simply leave the "Change the text to" box empty.
- When using the *Retain Capitalization* option, EndNote maintains ALL CAPITAL LETTERS and "Sentence style" capitalization. It will not recognize "Headline Style." If the first letter of the text to be replaced is lowercase, the replacement text will be capitalized exactly as it was entered in the dialog.
- To enter a Carriage Return or Tab in the text box, use the *Insert Special* button.

Change Fields

The *Change Fields* tab can change the contents of a field for the references that are "showing" in the Library window.

Note: This operation cannot be undone, so make sure you have backups before making changes.

To change the contents of a field:

1. Determine which references you want to modify. Make sure only those references are showing in the Library window.
2. From the Tools menu, choose *Change and Move Fields* to display the *Change Fields* tab.
3. From the *In Field* list, choose the field that you want to modify.
4. Select one of the following options:

   Insert after field's text appends text at the end of the chosen field. It does not modify the text already in the field.

   By default, the *Include a space before the new text* check box is selected at the bottom of the dialog, to insert a space between the existing text and the new text.

   Insert before field's text inserts the text at the beginning of the chosen field. It does not modify text that is already in the field.

   By default, the *Include a space after the new text* check box is selected at the bottom of the dialog, to insert a space between the new text and the existing text.

   Replace whole field with replaces the entire contents of the field with the text entered in the text box.

   Clear field deletes the entire contents of the chosen field. It is not necessary to put any text into the text box.

5. In the text box, type the text that should be added to the field.

To enter a Carriage Return or Tab in the text box, use the *Insert Special* button.

6. Click *Change*. EndNote will ask you to confirm the changes. The dialog EndNote presents provides this information:

   How many references will be changed

   The library in which the changes will be made

   The type of change that will be made

7. Click *OK* to continue with the changes, or click *Cancel* to cancel this operation.

Move Fields

Use the *Move Fields* tab to move the entire contents of one field to another field within a reference. The command applies to all of the references that are "showing" in the Library window.

Note: This operation cannot be undone, so make sure you have a backup copy of your library before making changes.

To move the contents of one field to another:

1. Determine which references you want to modify. Make sure only those references are showing in the Library window.
2. From the Tools menu, choose *Change and Move Fields*.
3. Click the *Move Fields* tab.
4. In the dialog that appears, use the "Move from" list to select the field you want to move the data from.
5. Use the "Move to" list to select the field where you want that data to end up.

6. Click *OK* to move the data from one field to the other within each reference that is currently showing in the Library window.

You have the option of inserting the moved text before or after the data in the destination field, or replacing the entire contents of the destination field. In the latter case, you have the additional option of whether or not to move empty fields. If you uncheck the option "Don’ t move empty fields," then any reference with an empty originating field deletes the contents of the corresponding destination field (and thereby making it empty as well). If this option is turned on, the contents of the destination field will *not* be deleted if the originating field is empty.

Searching Online Databases

Introduction to Searching Online Databases

Introduction to Searching Online Databases

Using EndNote's *Online Search* commands, you can search online bibliographic databases just as easily as you can search an EndNote library on your own computer. The results of your searches can be downloaded either to a temporary EndNote library or directly into your own EndNote library.

How Does It Work?

EndNote is able to provide access to these remote sources using an information retrieval protocol called "**Z39.50**." Z39.50 is widely supported by libraries and information providers around the world as a convenient method to access their library catalogs and reference databases.

EndNote stores the information necessary to connect to and search these online databases in individual **connection files**. Pre-configured connection files are provided for a number of these sources. If necessary, you can also customize or configure your own connections to Z39.50-compliant databases (see Editing a Connection File and Creating Connection Files).

Note: If the online database that you access is not available on a Z39.50 server, EndNote will not be able to connect directly to it. We suggest that you submit a request for Z39.50 compatibility to your librarian or the institution that provides access to the database. You can still import references downloaded from non-Z39.50 databases. See General Importing Instructions.

What EndNote's Searching Offers

EndNote's search interface provides a simple way to do basic searches on EndNote libraries and online databases. The same Search tab is used for both purposes. This removes the need to learn a separate program to access the online databases or go through the extra steps of saving the references to a text file and importing them into EndNote.

This search interface is not intended to replace the advanced search options that may be available using the search interface offered by your information provider. There may be times when you want to use the information provider's search interface (for example, to take advantage of a thesaurus of search terms) and then import those references into EndNote. This is still an option using EndNote's *Import* command (see Importing Reference Data into EndNote). But once you know the terms that you want to use in your searches, being able to retrieve the necessary references directly from EndNote is a very fast and efficient approach.

How to Search an Online Database

The process of searching an online database is very similar to searching an EndNote library. Here are the basic steps involved; more detailed descriptions of these steps are provided in additional help topics.

First, Choose Integrated or Online Search Mode

You can download found references directly into an existing EndNote library (with Integrated Mode) or into a temporary library (with Online Search mode).

Using a temporary library is helpful if you want to experiment with potential search strategies, or refine a search strategy. You can retrieve batches of references without affecting your permanent library, and then copy only selected references into your permanent library.

To save references directly into your library:

1. Open the EndNote library that will receive the downloaded references.

2. At the far left of the toolbar, make sure Integrated Library & Online Search Mode is selected (the icon on the left), so that all commands and groups are available.

When you download references from the online database, they will be saved to the open library (the library name appears at the top of the window). If you download references that you find you do not want, you must delete them from the library.

To store references in a temporary library:

1. Create a new EndNote library or open any existing library.
2. On the toolbar, select Online Search Mode (the icon on the right), so that only Online Search groups and commands are available.

When you download references from the online database, they will be stored in a temporary library (rather than a library name, the top of the window indicates "Online Mode"). In order to save references permanently, you must use either the *References>Copy References to* command to copy selected references to a new or existing library or the *Copy to Local Library* icon from the toolbar. When you close the temporary library, all references in it will be lost.

If you initiate an online search while in Local Library Mode, the display will automatically switch to Online Search Mode.

Then, Search and Download References

To search and retrieve references from a online database:

1. Initiate the online search in one of these two ways:

   From the Tools menu, choose *Online Search* to display the full collection of connection files. (Or click *more* under the Online Search groups.) Select the online database that you would like to search, and click *Choose*.) See Selecting a Connection File.)

   When the connection has been established, EndNote's Search tab appears in the Tab pane, ready for you to enter a search.

   Once you have searched an online database, or marked the database as a favorite with the Connection Manager, it appears in an Online Search list in the Groups pane of the Library window. (See Picking Your Favorite Connection Files.)

   In the Online Search list, click on the database you wish to search. EndNote connects to the online database and displays the Search tab.

2. Enter your search request into the Search tab, and click *Search*.

   EndNote searches the database and displays the number of references that were found to match your search criteria.

3. Click *OK* to retrieve the references.

   If you would like to pause during record retrieval, click *Options* and choose *Pause*. When you are ready to continue, click *Options* and choose *Resume*.

Note: The connection to the online database is maintained only until the search is completed and the matching references are retrieved; when the references are downloaded, you are automatically disconnected. Each time you initiate another search, EndNote reconnects.

Next, Determine Which References to Keep

If you are working in Integrated Library & Online Search Mode:

All references are already saved to the current EndNote library, and are displayed in a group under Online Search.

If you decide you do not want to keep any of the retrieved references, display the group of references and click in the list, go to the *Edit* menu and *Select All*, and then go to the *References* menu and select *Move References to Trash*.

You can also highlight individual references and choose *References>Move References to Trash*. (You can use Ctrl +click to select non-contiguous references in the list, or use Shift+click to select a range of references.)

If you are working in Online Search Mode:

The retrieved references are stored in a temporary library. Rather than a library name at the top of the window, EndNote displays “Online Mode.”

To save all of the retrieved references, click in the list of references, go to the *Edit* menu and *Select All*, and then do one of these:

> Go to the *References* menu and select *Copy References to* in order to select a new or existing library and copy the highlighted references to that selected library
>
> Or, click the *Copy to Local Library* icon on the toolbar to quickly copy the highlighted references to the currently active library

You could also highlight only individual references before copying them to an EndNote library. (Use Ctrl +click to select non-contiguous references in the list, or use Shift+click to select a range of references.)

The references are copied to the selected library and are displayed in a Copied References group. Each time you copy references into an EndNote library, the Copied References group is replaced with the new set of references. Previously copied references remain in the library; they are just no longer part of the latest Copied References group.

Another way to save references downloaded in Online Search Mode is to use the *Copy* and *Paste* commands from the *Edit* menu to copy individual references from Online Search Mode and then paste them into Local Library Mode.

Leave Online Search mode in one of these ways:

> Click on Local Library mode, which leaves Online Search Mode intact. You can switch between these two modes without losing the current Online Search data.
>
> Click on Integrated Mode. This closes the current Online Search Mode session. Any references in Online Search Mode are discarded, so make sure you first copy references you want to keep into your permanent library.
>
> Click the corner close button. This closes the entire EndNote library (all modes). Any references in Online Search Mode are discarded, so make sure you first copy references you want to keep into your permanent library.

Selecting a Connection File

Selecting a Connection File

Before an online source may be searched, you must first connect to it by selecting the corresponding **connection file**. The connection file tells EndNote which online database you want to search, where to find it online, and what search options are available for it.

Access-Restricted Databases
Free Databases
Picking Your Favorite Connection Files
Establishing the Connection

Access- Restricted Databases

EndNote comes with pre-configured connection files to free reference databases and library catalogs as well as databases that require payment and/or authentication for access. Most of the databases offered by the commercial information providers (Ovid, OCLC, DIMDI, SilverPlatter, etc.) require an account for access. There are, however, numerous databases that are available at no cost to you, and no account is required (see Free Databases).

Note: To gain access to a restricted database, you will need to contact the information provider directly to set up an account. Thomson Reuters does not control access to any of the sources.

When you attempt to connect to a restricted database, by default EndNote prompts you to enter your user ID and/or password. If you have a user ID and/or password supplied by the data provider that hosts the restricted database, simply enter the necessary information, and click *OK* to log on. (Depending on the database you are accessing, the passwords and IDs may be case-sensitive.)

If you do not have a user ID and/or password, but instead have authenticated access to a database either by IP address recognition (for example, your computer is on your university campus or company network and has an IP address that is recognized as authenticated by the data provider's server) or through a proxy server, it may be possible to configure the connection file and your Network Preferences so that you do not need to enter a user ID and password.

If you have access to a restricted database by IP address recognition, you may need to edit the connection file so that it does not prompt you for a user ID and/or password. In EndNote, select *Edit>Connection Files>Open Connection Manager*. Locate the connection file for the database you wish to access, select it, and click *Edit*. Click on *Connection Settings* and clear the User ID and Password boxes under " Login Information Required." Select *Save* from the File menu to save your changes, and then close the connection file.

If you have access to a restricted database via a proxy server, you must make sure that your Internet settings are properly configured, because EndNote uses these settings. See Problems Connecting for information about proxy servers. You will need the address and port number of your proxy server.

Free Databases

Two major databases that do **not**require passwords are the PubMed database from the U.S. National Library of Medicine, and the Library of Congress. Many of the general library catalogs are also unrestricted. Additional connections may be available at the EndNote Web site (http://www.endnote.com/support/ enconnections.asp).

Databases Not Requiring an Account

Description	Information Provider/Category
PubMed (MEDLINE and pre-MEDLINE) references from the National Library of Medicine	NLM
Most university library catalogs	Library Catalogs
Books at the Library of Congress	Library of Congress

Picking Your Favorite Connection Files

EndNote provides hundreds of connection files for a variety of sources. To peruse the list of available connection files, choose *Connection Files* from the *Edit* menu, and select *Open Connection Manager*. The list includes the original connection files installed in the EndNote program folder (Program Files\EndNote X4 \

Connections ns:EndNote :Connections) as well as any user created or edited files stored in your personal Connections folder (see Folder Locations Preferences).

When you have found a connection file that you will want to use in the future, click the check box to the left of it to mark it as a favorite. All marked files (up to 500) appear under the Online Search section in the Groups pane of the Library window, giving you easy access to those files you use most often. This step is not required; you can always choose the Online Search command, or the more item under Online Search in the Groups pane, to pick a connection file that is not listed in the Groups pane.

Use the following features in the Connection Manager window to locate the connection file(s) that you want to use:

- Type a database name into the Quick Search text box and press Enter to search for a connection file by the name of the database.
- Click *Find by* and EndNote displays the list of information providers (categories) used for all of the connection files. Choose one to restrict the list to show just that set of files. That will help you to find the one you want, or choose *Mark All* to mark up to 500 connection files in the subset.
- Click the column headings to sort the connection files by name or by information provider. Clicking the same column heading a second time will change the sort order from ascending to descending. Click again to set it back to ascending order.
- If you know the name of the connection file that you want to use, you may start typing it and the first file that matches what you type will be selected.
- Click the *More Info* triangle button at the bottom of the dialog to display additional information about the selected connection file.

Note: For information about editing connection files or creating new ones, see Introduction to Connection Files.

What if Your Database Isn' t Listed?

By default, EndNote installs only the 100 most popular connection files. For information about locating and installing additional files, see Installing Additional Connection Files.

If a connection file has not been provided for the database that you want to search, contact your librarian or information provider to see if their database is available on a Z39.50 server. If it is, you should request the information required to set up a Z39.50 client for that database. See Creating Connection Files.

Adding Connection Files

The Connection Manager displays all of the connection files in the EndNote program folder as well as in your personal Connections folder. If you have received a connection file from a colleague or librarian or downloaded one from the Web, copy it into your personal Connections folder and it will appear in the Connection Manager. Keeping the file in your personal Connections folder ensures that it will not be deleted or overwritten with future updates to the EndNote program.

To locate your personal Connections folder, or to designate a different Connections folder:

1. Choose *Preferences* from the Edit menu, and select the *Folder Locations* option.
2. In the "Connection Folder" section, click *Select Folder* and select the folder that contains the connection files that you want to use.
3. Open the folder and then click *Select.*
4. Click *OK.* and close the Preferences window.

Note: New and updated connection files are posted on the EndNote Web site (http://www.endnote.com) as they become available.

Searching an Online Database

Establishing the Connection

The first step to searching an online database is to connect to it. Once the connection has been made, you're able to use EndNote's Search tab to search the online database.

If you have connected to a particular database before, or if you have selected a database as one of your "favorites" (see Picking Your Favorite Connection Files), it will appear in the Groups pane under Online Search. This saves you a few steps in the process of using the Online Search command.

To connect to an online database, do one of these:

- On the Groups pane, under Online Search, select the online database you want to search. That initiates the online connection.
- If the database you want to search is not listed under Online Search in the Groups pane, choose *Tools* > *Online Search*, select the desired database, and click *Choose* to initiate the connection.

This Connection dialog is very similar to the Connection Manager described in The Connection Manager, but it does not provide the options to edit connection files or mark them as favorites.

When a successful connection has been made, the Search tab is automatically opened with the online database selected for searching. You are now ready to begin searching the database.

The connection to the online database is maintained only until the search is completed and the matching references are retrieved; when the references are downloaded, you are automatically disconnected. Each time you initiate another search, EndNote reconnects.

Note: If you have difficulty establishing a connection, see Troubleshooting Connections.

Online Database Searching (Overview)

Searching an online database is essentially the same as searching your own EndNote library. After establishing a connection:

1. Enter your search term(s) into EndNote's Search tab.
2. Choose the appropriate search options.
3. Click *Search* to send the search request to the online database.

A few significant differences between searching an online database and an EndNote library are described in Searching EndNote Fields vs. Online Database Indexes. See The Search Tab for general information about using the Search tab.

Available Search Options

Once you are connected to an online database and that database is selected for searching, certain elements on the Search tab change from the settings that are available for EndNote library searches.

- The search set list changes when searching an online source. You can search either the remote database or the list of references already retrieved and saved from the remote source.
- The Match Case and Match Words options are not available for online database searches.
- The options available in the search menus (such as *Author*, *Title*, or *Keywords*) vary with each database, and they are not the same as searching the fields in an EndNote library (see Searching EndNote Fields vs. Online Database Indexes).
- The comparison list for each search line is always set to *Contains*.

Boolean Searches

Multiple search terms can be combined using the boolean operators And, Or, and Not. EndNote constructs a search from the top to the bottom of the search tab, finding the search results of the first two items, then combining that result set with the third search line, and so on.

Field	Comparison Operator	Search Term	Boolean Operator
Keywords	Contains	fossil	And
Keywords	Contains	dinosaur	Not
Keywords	Contains	avian	Or
Author	Contains	Balanoff	

For example, the search shown above could be written as:

(((fossil AND dinosaur) NOT avian) OR Balanoff)

First EndNote looks for references about fossils and dinosaurs, then any references to avian would be omitted from that set, and finally all references by " Balanoff" would be added.

Keep in mind that "OR" broadens your search by adding together two result sets; "AND" narrows the focus of the search by looking for the intersection of references found; "NOT" also narrows the search by omitting the results for one term from the current result set. See for more information about the *Search* command.

Searching EndNote Fields vs. Online Database Indexes

When searching an online database, you are *not* searching the specific fields in each record, but rather the available search indexes for that database. The search menus on EndNote's Search tab list only available indexes for the online database, so you will not see all of the generic EndNote field names listed as you do when searching an EndNote library.

If the current search strategy is set up to search an EndNote field that does not exist as an online database search index, that field name will appear in italics. If you try to execute a search, EndNote will advise you that the field is not valid. Change the search field selection to a valid index for the selected online database.

The connection file for a particular database stores the names and settings for the search options listed in the search menus. See Search Attributes if you are interested in changing the pre-configured options.

Note: Comparison operators other than "Contains" cannot be used when searching online databases.

Understanding Search Results

When searching an online database, the search menus display a list of available search *indexes* supported at the remote site. These are not *fields* in the online database, but rather sets of search terms and synonyms designed to facilitate your searches.

It is not uncommon to search for a term in an index and notice that the exact term appears nowhere in the retrieved reference(s). For example, you might search for "heart attack" in the Title index of a medical database and find references that do not include "heart attack" in the Title field but, instead, they use the term "myocardial infarction." This apparent discrepancy can be attributed to the search index of the online database, which has mapped the common term "heart attack" to its scientific equivalent "myocardial infarction."

It is also not uncommon for some of these databases to index personal names that appear in the titles or keywords along with the author names. For example, a search of the Library of Congress for "Charles Dickens" in the Author index displays books *about* Dickens as well as those written by him. This form of indexing is most commonly seen with library book catalogs and not with the scientific reference databases. Sometimes you can restrict the searches to books *by* that particular author by setting up a search to find (for example) "Charles Dickens" in Author, NOT "Charles Dickens" in Keywords.

These search indexes are maintained by the providers of the databases and are not controlled by EndNote.

Online Database Search Limitations

Some of the search options have additional limitations that you would not encounter when searching an EndNote library. For example, some databases prohibit searching for a year alone. The year can be specified only to limit a search (these are called "limit fields"). In such a case, a search for 1997 as the year would be denied, but searching for Smith as an author *AND* 1997 as the year (thereby limiting the results of the author search), would be allowed.

If you have set up a search that is not accepted by the online database, an error message will describe the source of the problem as specifically as possible. (See Troubleshooting Connections.) Keep in mind that these restrictions are set by the information provider, not EndNote.

Documentation from the information provider may help to clarify what search options are available.

Changing the Focus of the Search

The target of the search is the online database (represented by the database name on the Search tab) or the current EndNote library group that is displayed when the *Search* command is chosen. (If you haven' t yet connected to the online database or opened a library, you will need to do so before you can search it.) To change the focus of a search, click on a different library group or online database in the Groups pane.

The available search options differ among the various online databases, as well as between online databases and EndNote libraries. When you change the target of a search, the field options on the Search tab change automatically. You could set up a Keywords search for a particular online database, but when you select a different online database, the field selection changes because Keywords is not an option for the new database selection.

When switching the focus of your search from one group to another and back again, the original search setup is retained as long as you have not changed any settings on the Search tab and the field selections are available in both databases.

Retrieving and Saving References

Retrieving and Saving References

After a successful search, EndNote alerts you to the number of references that were found. You have the option of retrieving all of the references or a specific range of references. (The order of the retrieved references reflects the way they were returned from the server—this is not necessarily alphabetical, chronological, or in order of relevance.)

Choosing *OK* allows EndNote to begin retrieving references.

If you have previously downloaded references from an online database since opening the library (whether a permanent library or a temporary library), you may want to select the check box to “Clear currently displayed results before retrieving records.” This simply removes the previously downloaded references from the Online Search group; they are still available in the library.

Changing the range of references to be retrieved is useful if you want to check the results of your search before downloading the entire set of references. For example, if your search found 200 references, you may want to retrieve only references 1-10, then check those references, and either continue downloading or change your search criteria. To continue downloading, submit the search again, then request only references

11 through 200. You can also pause during record retrieval; on the Search tab, click *Options* and select *Pause*. Click *Resume* when you want to continue.

If you discovered that you should refine your search to get better results, it's helpful to look at the keywords of the references you have downloaded to see if there are terms there to help you refine your search strategy.

How references are saved is determined by the current display mode.

Integrated Library & Online Search Mode

If you are working in Integrated Library & Online Search Mode, references are downloaded and saved into the current library and displayed in a Online Search group. The library name appears at the top of the window.

If you decide you don't want to keep the retrieved references, select them (click in the list and use Ctrl +A to select all references in the current list, use Ctrl +click to select non-contiguous references, or use Shift+click to select a range of references) and choose *Move References to Trash* from the *References* menu.

Online Search Mode

If you are working in Online Search Mode, references are downloaded into a temporary library. The top of the window indicates "Online Mode." To save references, highlight them (click in the list and use Ctrl +A to select all references in the current list, use Ctrl +click to select non-contiguous references, or use Shift+click to select a range of references) and then:

- Go to the References menu and select *Copy References* to in order to select a new or existing library and copy the highlighted references to that selected library
- Or, click the *Copy to Local Library* icon on the toolbar to quickly copy the highlighted references to the currently active library

Another way to save references downloaded in Online Search Mode is to use the *Copy* and *Paste* commands from the *Edit* menu to copy individual references from Online Search Mode and then paste them into Local Library Mode.

Leave Online Search mode in one of these ways:

- Click on Local Library Mode, which leaves Online Search Mode intact. You can switch between these two modes without losing the current Online Mode references.
- Click on Integrated Mode. This closes the current Online Search Mode session. Any references in Online Search Mode are discarded, so make sure you first copy references you want to keep into your permanent library.
- Click the corner close button. This closes the entire EndNote library (all modes). Any references in Online Search Mode are discarded, so make sure you first copy references you want to keep into your permanent library.

Discarding Duplicate References

If you use the same search strategy to search multiple online sources, you may introduce duplicate references into your EndNote library. There are two methods to identify and remove duplicates:

- You can identify and delete duplicates in your EndNote library after downloading is completed. This process allows you to view each duplicate before deleting it. See Finding Duplicate References.
- You can discard duplicates during the downloading process, as described below.

To automatically discard duplicates:

1. From the Edit menu, choose *Preferences*.
2. Display the Duplicates panel.

3. Under Online Search Results, select the “Automatically discard duplicates” box.

Future online searches will automatically use the duplicate detection criteria on this panel to identify and discard duplicate references. The duplicates never appear, and are not inserted into the library. This means that the number of references saved to your library could be fewer than the number reported found on the Confirm Online Search dialog.

Note: Discarding duplicates applies only to the library that is current during downloading. If you are using Integrated Library & Online Search Mode, it applies to the permanent library. If you are using Online Search Mode, it applies only to the temporary library; you may still need to search for duplicate references in your permanent library.

The Connection Status Window

The Connection Status window provides detailed information about a connection and EndNote’s interactions with the online database and server. This window is useful to help you or to help EndNote Technical Support assist you in tracking down the source of a problem with an online database.

View the connection status information by choosing *Show Connection Status* from the *Window* menu to display the Status window. When that window is open, this command changes to *Hide Connection Status*, which closes the Status window.

The Status window displays information for the latest connection. A menu at the top of the Status window lets you view either the record data for each reference or the status messages returned from the server of the online database.

Note: The Connection Status window displays the last 32K of text written to the log file. If you need to see more than that, you can open the Connect .log file in a word processor after closing the Retrieved Reference window(s).

The Log File

All messages and retrieved references for a given EndNote session are recorded in a log file. By default, the log file is called "Connect .log" and is saved in the folder:

Windows XP: Windows\Application Data\EndNote folder or the Documents and Settings\[UserName]\Application Data\EndNote

Windows Vista: C:\ Users\[User Name]\ App Data\Roaming\EndNote\

An existing log file is overwritten the first time EndNote establishes a connection after being started.

You may choose a different name and/or location for the log file using the URLs & Links settings in the Preferences window. To do so, choose *Preferences* from the Edit menu and select the *URLs & Links* option from the list. Click *Choose* in the "Connection Log" section to name the new log file and choose where to save it.

You may also choose not to create a log file by clearing the "Use Log File" option. This will slightly speed up the retrieval process. However, without a log file you will not be able to scroll back through the record data or status messages after you change the *View* setting in the Connection Status window.

Importing a Log File

The log file is a regular text file. It can be viewed using a word processor and imported, if necessary, using the connection file. In this sense, the log file is a back up for the references retrieved in a particular EndNote session. You can verify that EndNote retrieved the reference data correctly by browsing through the log file in your word processor and comparing the unmodified data to what appears in your EndNote references. If necessary, you can change the settings in your connection file and re-import the references (without reconnecting to the online database).

Note: You cannot import from a Connect .log file saved from Web of Science/Web of Knowledge. You must do a regular online search or a direct export.

To import a log file using the filter options of a connection file:

1. Open a library into which you want to import the log file.
2. Choose *Import* from the File menu.
3. Click *Choose File* and select "Connect .log." (Substitute the name of your log file if you have changed the default name.)
4. Choose *Use Connection File* from the *Import Options* list in the Import dialog
5. Select the desired connection file and click *Choose*.
   Now you should be back in the Import dialog with both the file and the import option set.
6. Next to Text Translation, choose " No Translation ."
7. Click *Import.*

Note: The connection file and filter file for a database are likely configured to import very different reference formats. Normally, a connection file is set up for MARC data, whereas a filter is set up for tagged data. Because the output formats are so different, you should not use a filter file (*. ENF) to import a log file from the same database— instead, choose the connection file (*. ENZ) as the import option.

Searching Web of Knowledge

Searching Web of Knowledge

Web of Knowledge is a comprehensive research platform, which means it brings together many different types of content for searching. Journal articles, patents, Web sites, conference proceedings, Open Access material—all can be accessed through one interface, using a variety of powerful search and analysis tools.

Search Web of Knowledge just as you would search any other online database. Your search results are copied directly to the EndNote library of your choice.

Once the records are in EndNote, you can click on an EndNote record's URL to jump back to the original Web of Knowledge online record. Various options are available to you online, such as viewing a list of related references.

Available Web of Knowledge Databases

As of this release, at least the following Web of Knowledge databases are available for direct online searching with EndNote.

Biological Abstracts
BIOSIS Previews
CAB Abstracts
Current Contents
FSTA
MEDLINE
Web Citation Index
Web of Science
Web of Science AHCI
Web of Science SCI
Web of Science SSCI
Zoological Records

Full Record Charges

Web of Knowledge requires a paid subscription. You may have an online subscription with username and password, or you may have access to a local Web of Knowledge server.

Users of Previous Versions of EndNote

If you used a previous version of EndNote, many of your preferences were saved when you upgraded to EndNote X4. However, if you want the ability to link back to Web of Knowledge records, you may need to update the Base URL. From the

Finding Related Online References

Finding Related Online References

Highlight a reference in EndNote and use the *URL>OpenURL Link* command on the References menu to start your default web browser and display the full text article (if available) plus a list of links to similar articles.

OpenURL Link connects to an OpenURL standard syntax server and uses EndNote's OpenURL preferences along with data in your EndNote record to find related online references.

Note: This command has no relation to the URL field found in EndNote references or to the *URL>Open Link* command on the References menu (which opens the specific URL found in the URL field).

To enable this feature, and find out what preferences are available, see OpenURL Preferences.

Finding Full Text

Finding Full Text for a Reference

EndNote X4 can attempt to locate full text files on the Web by using data stored in your references. Once found, EndNote downloads and attaches the files to the references.

EndNote can use these methods when searching for full text publications:

Web of Knowledge Full Text Links
EndNote Web Services
DOI (Digital Object Identifier)
PubMed LinkOut
OpenURL

EndNote will try to use all of these methods to optimize the likelihood of finding full text files associated with your bibliographic records.

The Web of Knowledge free journal set is checked for all users; subscribers may have full IP-based access to all resources. In cases where full text PDF files require a subscription, and you or your institution have the appropriate access, EndNote will attempt to authenticate and automatically download the appropriate files. If EndNote cannot find the full text file, it will often be able to attach the URL of the provider's Web page for the article for easier future access.

For full information about finding the full text for a reference, see:

- Adding Access to Your Institution's Library
- How to Find and Retrieve Full Text
- The Find Full Text Groups
- Pausing or Canceling Find Full Text
- Improving the Search for Full Text

Adding Access to Your Institution's Library

Many libraries are accessible with an OpenURL Path. Subscription libraries also require valid authentication, which usually means a user ID and password. First, you must determine the appropriate OpenURL path. If the library requires authentication, you must also determine the authentication URL. Next, enter these URLs as

Find Full Text preferences. Then, you may need to authenticate access by entering your personal user ID and password. These definitions may be helpful to you:

OpenURL Path: This is the OpenURL web address to the online library. It is where EndNote will be directed to search for matching references.

Authentication URL: This is the web address to the page where you enter subscription details to access the online library. It is typically the page where you enter a username and password. Once you enter the Authentication URL (if required), EndNote can access the full text of the matching references from the online library's OpenURL Path.

Proxy Server: Your institution may use a proxy server to control access. The settings for a proxy server are not addressed with the Find Full Text settings in EndNote. If Internet Explorer is configured for use with a proxy server, EndNote will automatically handle the proxy server when accessing http-based connections. If you do not use Internet Explorer, configure proxy settings with the Internet Options in the Windows Control Panel.

Determining the OpenURL Path

The easiest way to determine your institution's OpenURL address is to ask your librarian. You could also check http:// www.worldcat.org/registry/Institutions/.

SFX link resolvers work best, so look for a URL that begins with http:// sfx.library or a similar URL that contains sfx in the path.

Determining the Authentication URL

In order to use the OpenURL path to find full text articles, your institution likely requires that you log in to access full text. EndNote uses an authentication URL to automatically direct you to your institution's log-in web page.

Again, the easiest way to determine the authentication URL is to work with your librarian. To act as your own detective, though, you can try the suggestion below.

To determine the authentication URL:

1. Enter the OpenURL path as an EndNote preference.
   a. From the *Edit menu*, select *Preferences.*
   b. Select the Find Full Text panel.
   c. Select the OpenURL box, and enter the OpenURL Path.
   d. Click OK to save the setting.
2. Try one of these:

   Follow the URL Path:

   a. Highlight a reference -- one where you believe the full text article is available from your institution.

   b. Right click on the reference and choose URL>OpenURL Link. If you are not automatically directed to the full text article, use your browser to continue to try to get to the full text PDF file.

   Browse to the URL:

   Use a browser to go to your library's Web site and try to access a subscription resource.

   3. Once you reach a page where you are prompted to enter credentials, copy the root of that URL. It may start with https:// login.ezproxy. Copy everything through "/login? url=%@".
   4. Enter the path as an authentication preference as described next under Setting Full Text Preferences.
   5. Test the URL by logging in to your institution's site as described below.

Setting Full Text Preferences

Once you have determined the appropriate OpenURL path and authentication URL for your institution, you must enter them as preferences in EndNote.

To enter Find Full Text preferences:

1. From the *Edit* menu, select *Preferences*.
2. Select the Find Full Text panel.

   This panel determines which methods are used when searching for full text articles. By default, Web of Knowledge Full Text Links, DOI, and OpenURL are selected. PubMed LinkOut is also available, but may slow performance.
3. To search your institution's library, make sure OpenURL is selected, and enter your institution's OpenURL Path. If authentication is required, enter an Authentication URL (the address of the site's login page).

For more information, see Find Full Text Preferences.

Logging in to Your Library

Once you have entered the appropriate URLs as Find Full Text preferences, you can log into your institution's library. Do this in one of two ways:

Authenticate Only

From the *References* menu, select *Find Full Text* and then *Authenticate*.

This method allows you to try connecting without starting a Find Full Text search. You should be directed to your institution's login web page. Log in as indicated on the web page. You may be directed to a home page or a list of resources, which means you are logged in. Click *Done*. You are authenticated for this session of EndNote or until your institution times out the connection.

You still need to specifically select the *References>Find Full Text>Find Full Text* command to begin searching for full text articles.

Authenticate and Search

From the *References* menu, select *Find Full Text* and then *Find Full Text*.

If you have an OpenURL path and authentication URL entered under Find Full Text preferences, EndNote will direct you to your institution's login web page. Log in as indicated on the web page, and then click *Continue* to begin the search for full text articles for the selected references.

You are authenticated for this session of EndNote or until your institution times out the connection.

Note: Your institution may sever your OpenURL connection after a certain amount of idle time. Unfortunately, there is no indication when that happens. You will need to go to the *References* menu, select *Find Full Text* and then *Authenticate* to restore access to the site. Just selecting *Find Full Text* again during this EndNote session will not restore authentication.

How to Find and Retrieve Full Text

When you retrieve the full text file of a referenced work, it is saved to the File Attachments field as a relative link (the file itself it stored in the current library's .DATA folder). The file is saved in its native format, which in most cases is a PDF file.

When a full text file is downloaded and attached to a reference, a file attachment icon appears in the File Attachment field for the reference. In the Library window, a paper clip icon appears in the File Attachments column for that reference.

Note: In order to find full text, cookies must be turned on in Internet Explorer.

The *Find Full Text* command can attempt to find full text documents for up to 1000 records at a time; this total includes all full text searches run concurrently in open databases. If you want to find the full text for more than 1000 EndNote records, you must run the Find Full Text operation more than once. Highlight up to 1000 references each time.

The *Find Full Text* command is available only in Integrated Library and Online Search Mode or Local Library Mode. It is not available in Online mode.

To find and retrieve full text:

1. Select the reference(s) to which you want to add full text.

   In the Library window, highlight up to 1000 references.

   For example, you can select a single reference, or hold down the Ctrl key to highlight individual references, or use *Edit>Select All* to select an entire Group of displayed references.

   Or, open an individual reference for editing.

2. From the References menu, choose *Find Full Text > Find Full Text.*

If you have a reference open, you can use the right-click contextual menu to select *Find Full Text.*

3. (Optional) If you have entered an OpenURL address and authentication URL under Find Full Text preferences, you may be directed to a login web page for your institution's library. Follow the instructions to log in, such as entering the appropriate User ID and password. Once you are logged in, click *Continue*.

EndNote begins searching for and downloading full text for the selected references. Full text downloading happens in the background, which may affect the performance of other operations.

References appear in groups under a Find Full Text group set. See The Find Full Text Groups for a description of the resulting groups.

Note: Your institution may sever your OpenURL connection after a certain amount of time. Unfortunately, there is no indication when that happens. You will need to go to the *References* menu, select *Find Full Text* and then *Authenticate* to restore access to the site. Just selecting *Find Full Text* again during this EndNote session will not restore authentication.

To add access to a library, see Adding Access to Your Institution's Library.

To improve the likelihood of finding full text articles for references, see Improving the Search for Full Text.

If you want to pause or cancel a Find Full Text operation, see Pausing or Canceling Find Full Text.

The Find Full Text Groups

During the Find Full Text searching and downloading process, results are constantly updated under a Find Full Text group set. Initially, the Find Full Text group set is added below all other group sets. However, you can click and drag the Find Full Text group set to any position. EndNote will maintain that new position across sessions.

The Find Full Text temporary groups described below, Searching, Found PDF, Found URL, and Not Found, remain for the current session, but disappear when you close the library.

If you run the Find Full Text operation more than once during a single library session, the additional references are added to the references already found in the Find Full Text groups.

Searching...

This group displays the current set of references for which EndNote is attempting to find either the full text file of each referenced work or at least a URL to the referenced work. When the full text search is completed, this group is deleted. Those references to which full text or a URL was added are displayed in a Found PDF group or a Found URL group.

You can cancel the Find Full Text operation at any time by right clicking on the Searching group, to display a context-sensitive menu, and selecting Stop finding full text. Full text that has been retrieved until that point is already saved in the library.

Found PDF

This group displays the set of references for which EndNote inserted the PDF file of the referenced work as an attachment. These references will display a paper clip icon in the first column of the reference list. If a URL is also found, it is added to the reference, but the reference is not included in the Found URL group.

If a Find Full Text operation has already attached a file to a selected reference, EndNote will skip that reference when searching for full text. If you do want to look for a full text article for the reference, you must first delete the existing file attachment.

Found URL

This group displays the set of references for which EndNote inserted a URL to the referenced work, but did not find a full text document to attach.

Not Found

This group displays the set of references for which EndNote could not identify a full text file or a URL. These are only from the set of references searched with the Find Full Text command during this session of the EndNote library.

Pausing or Canceling Find Full Text

To pause a Find Full Text operation, right click on the Searching group to display a context-sensitive menu, and select *Pause finding full text*. Full text that has been retrieved until that point is already saved in the library.

To resume a paused Find Full Text operation, right click on the Searching group and select *Resume finding full text*.

To stop a Find Full Text operation, right click on the Searching group and select *Cancel finding full text*.

Improving the Search for Full Text

These are suggestions for improving the accuracy of the Find Full Text feature:

- Make sure you are IP authenticated to access any premium full text resources to which you would like EndNote to attempt connecting.
- Ask your librarian whether your institution is set up with Web of Knowledge custom journal links. If so, create a free personalized Web of Knowledge account and log in. If your institution does not have custom journal links set up for Web of Knowledge, ask your librarian to set it up (it is easy and free).
- Create a free EndNote Web account and log in. EndNote Web is included with EndNote X4. Make sure your EndNote Web account information is complete under EndNote Preferences (*Edit > Preferences>EndNote Web*).
- Review your EndNote references to confirm that the DOI information is in the DOI field. Data can be moved between fields with the *Change and Move Fields* command from the *Tools* menu.
- Enable Web browser cookies.

If you would like Find Full Text to search a specific library, see Adding Access to Your Institution's Library.

Stopwords

Stopwords are common, frequently used words such as articles (a, an, the), prepositions (of, in, for, through), and pronouns (it, their, his) that cannot be searched as individual words. If you include a stopword in a phrase, the stopword is interpreted as a word placeholder.

a
able
about
above
according
accordingly
across
actually
after
afterwards
again
against
ain't
all
allow
allows
almost
alone
along
already
also
although
always
am
among
amongst

an
and
another
any
anybody
anyhow
anyone
anything
anyway
anyways
anywhere
apart
appear
appreciate
appropriate
are
aren't
around
as
aside
ask
asking
associated
at
available
away
awfully
be
became
because
become
becomes
becoming
been
before
beforehand
behind
being
believe
below
beside
besides
best
better
between
beyond
both
brief
but
by
c'mon
c's
came
can
can't
cannot
cant
cause
causes
certain
certainly
changes

clearly
co
com
come
comes
concerning
consequently
consider
considering
contain
containing
contains
corresponding
could
couldn't
course
currently
definitely
described
despite
did
didn't
different
do
does
doesn't
doing
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eg
eight
either
else
elsewhere
enough
entirely
especially
et
etc
even
ever
every
everybody
everyone
everything
everywhere
ex
exactly
example
except
far
few
fifth
first
five
followed
following

follows
for
former
formerly
forth
four
from
further
furthermore
get
gets
getting
given
gives
go
goes
going
gone
got
gotten
greetings
had
hadn't
happens
hardly
has
hasn't
have
haven't
having
he
he's
hello
help
hence
her
here
here's
hereafter
hereby
herein
hereupon
hers
herself
hi
him
himself
his
hither
hopefully
how
howbeit
however
i'd
i'll
i'm
i've
ie
if
ignored
immediate
in

inasmuch
inc
indeed
indicate
indicated
indicates
inner
insofar
instead
into
inward
is
isn't
it
it'd
it'll
it's
its
itself
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kept
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latter
latterly
least
less
lest
let
let's
like
liked
likely
little
look
looking
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ltd
mainly
many
may
maybe
me
mean
meanwhile
merely
might
more
moreover
most
mostly
much
must
my
myself
name

namely
nd
near
nearly
necessary
need
needs
neither
never
nevertheless
new
next
nine
no
nobody
non
none
noone
nor
normally
not
nothing
novel
now
nowhere
obviously
of
off
often
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re
really
reasonably
regarding
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seem
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self
selves
sensible
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serious
seriously
seven
several
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shouldn't
since
six
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some
somebody
somehow
someone
something
sometime
sometimes
somewhat
somewhere
soon
sorry
specified
specify
specifying
still
sub
such

sup
sure
t's
take
taken
tell
tends
th
than
thank
thanks
thanx
that
that's
thats
the
their
theirs
them
themselves
then
thence
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there's
thereafter
thereby
therefore
therein
theres
thereupon
these
they
they'd
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they've
think
third
this
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those
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throughout
thru
thus
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vs
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we'll
we're
we've
welcome
well
went
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weren't
what
what's
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whenever
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where's
whereafter
whereas
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wherein
whereupon
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whether
which
while
whither
who
who's
whoever
whole
whom
whose
why
will

willing
wish
with
within
without
won't
wonder
would
would
wouldn't
yes
yet
you
you'd
you'll
you're
you've
your
yours
yourself
yourselves
zero

Importing Reference Data

General Importing Instructions

Note: See Importing EndNote Libraries for specific instructions about merging two EndNote libraries.

To import a text file or an EndNote library into an EndNote library:

1. Open the library into which you want to import the references.
2. From the File menu, choose *Import*.
3. Click the *Choose* button to locate and open the file you want to import. All files, except for EndNote libraries, must be plain text files. Select the file and click *OK*.
4. Select the appropriate import option from the Import Options list.
5. Select an option from the *Duplicates* list:

   Import All: Imports all references, including duplicates.

   Discard Duplicates: Imports all references except duplicates.

   Import into Duplicates Library: Duplicate references are imported into a library called File-Dupl.enl, where "File" is the name of the library into which you are importing.

By default, a reference is considered a duplicate when the Author, Year, Title, and Reference Type match a reference already in the library. See Duplicates Preferences if you would like to change the duplicates criteria.

6. Choose a *Text Translation* option.

   This option allows you to specify the text character encoding of the file you import, so that extended characters transfer correctly. You should verify the setting with your database provider. Some U.S. databases that contain extended characters require *ANSI-Latin1* or *UTF8*. MARC format files may require *ANSEL* translation. You might be able to use *No Translation* for text files that do not contain any extended characters.

7. Click *Import* to import the file.

Note: The time required to import a file, including an EndNote library, is proportionate to the size of the library and the number of references being imported. Refer to the progress indicator to determine when EndNote has completed the task.

When the import is complete, the newly imported references are displayed in an Imported References group. This is a perfect time to add a keyword to each imported reference with the Change Field command, or to peruse the imported data to make sure it imported as expected. Make sure to check references that contain extended characters.

The Imported References group is a temporary group that is replaced each time you import another set of references. It is removed when you exit EndNote (although the references remain in the library).

To return all of your references to the library display (including the newly imported ones), choose *Show All References* from the *References* menu or click on the All References group.

Import Option List

EndNote's import options include:

EndNote Library
Used to import references from one EndNote library into another. If the library you are importing from is closed or locked, all references are imported. If you the library you are importing from is open, with read/write access, the showing references are imported.

EndNote Import
Used to import text files that have been downloaded from online databases or exported from EndNote using the EndNote format. See Creating a Tagged "EndNote Import" File for more information.

Refer/ BibIX
Used to import text files exported from the Refer or BibIX programs. The EndNote import format is based on the Refer/ BibIX format.

Tab-Delimited
Used to import text files in which the fields within a single reference are separated by tabs. For details see Creating a Tab Delimited Format.

Reference Manager (RIS)
Used to import text files exported from Reference Manager, Reference Update, Reference Web Poster, or any other source that uses the RIS format. See Creating a Library from ProCite or Reference Manager.

ISI-CE
Used to import text files downloaded from the *Web of Science* and other Thomson Reuters sources.

Note: See Searching Web of Science for information about directly retrieving *Web of Science* records.

Multi-Filter (Special)
A special option for importing files that include references from multiple sources (see Identifiers).

EndNote Generated XML
Used to import EndNote's proprietary XML format.

Various import filters
EndNote includes hundreds of import filters configured to import data from a variety of online databases. Most likely, the first time you import a file, you will not see the import filter that you need in this list. Choose *Other Filters* from the *Import Options* list to find the filter that matches the source of the data you want to import. Import filters that you have recently used or chosen as your favorites will be listed in the Import Options list in the Import dialog.

The table in Summary of Output Formats and Corresponding Import Options provides more information about the download formats that work with these filters. See Choosing the Correct Import Filter for information about how to choose the filters to appear in the *Import Options* list.

Use Connection File
EndNote provides the option of using a connection file as an import filter. This is useful if you need to import the Connect.log file generated by using EndNote's *Online Search* command to search an online database. The Connect.log file should include all of the references from your previous session. See The Log File for more information.

Note: See Introduction to Filters for information about creating and modifying import filters. All of the import filters (except Tab Delimited and EndNote Generated XML) can be modified.

Importing Reference Data into EndNote

Retrieving References Directly from Online Databases
If you have access to a library catalog or bibliographic database that supports the Z39.50 protocol, you can use EndNote as a tool to search and retrieve references directly from that database into EndNote. You do not need to use EndNote's *Import* command at all; you use the *Online Search* command instead. This is by far the easiest way to get data into EndNote because it involves no intermediate steps. For more information about the direct retrieval of references, see Introduction to Searching Online Databases.

There are many sources of bibliographic data that can be used to help you create your EndNote library. To avoid re-typing this data into EndNote, we have provided several means by which you can get references into EndNote:

- Import references saved or downloaded from online data services (for example, Ovid, SilverPlatter, or Thomson Reuters).
- Import text files that conform to a particular format (such as the Tab-delimited or EndNote Import format). These files can be created by you or generated from other databases.
- Import text files exported from other bibliographic software programs.

First, you need to get your data files in the right format (see Summary of Output Formats and Corresponding Import Options and Getting Data in the Right Format), and then determine the correct import option.

Once you have a file in the proper format and you know which import option or filter to use, the import instructions are the same for all of these types of data. See General Importing Instructions.

Note: Although we try to provide many flexible ways to get data from other sources into EndNote, we do not claim that EndNote can import data from all sources. In some cases, you may have to write your own import filter (see Creating a New Filter), or you may need to manipulate the data in a word processor before it can be imported. If none of these tools helps you to import your data, tips on how to quickly copy and paste data into EndNote are described in Copying and Pasting References.

Note: When importing records, we recommend that you import into a temporary new library, determine which ones you want to keep, and then move those records into your permanent library.

Importing References From Other Bibliographic Software Programs

If you wish to convert references from another bibliographic program into EndNote, consult the chart below for instructions.

Conversion Utilities at the EndNote Web Site

In some cases, you may be directed to download a conversion utility or instructions from the EndNote Web site at: http://www.endnote.com. Follow the "Support and Services" link from the home page to display the EndNote Technical Support page. Under "Downloads," follow the "Database conversion utilities" link. Some conversion utilities are available only for a specific platform (Windows or Macintosh).

Unsupported Databases

If your program is not on the chart, see Creating a Tab Delimited Format for importing into EndNote. If your database does not offer a tab-delimited export option, contact technical support for other suggestions.

Software	Basic Conversion Instructions
Bookends and Bookends Pro	You have several options when converting from Bookends or Bookends Pro. In recent versions of Bookends, you can *Export* using the “XML (EndNote 8 or later)” setting, and then *Import* the file into EndNote using the “EndNote generated XML” option. Or, *Export* from Bookends using the “bibliographic format” option, and select either the “RIS” or the “EndNote Export (Refer)” format, and then *Import* the file into EndNote using the matching “RIS” or “Refer” Import option.
BibTex	User-contributed utilities and instructions for converting BibTex files are available from the EndNote Web site at: http://www.endnote.com. Go to the "Support and Services" section. Under "Downloads," find "BibTex conversion tools," and click *More* to browse the FTP site.

Citation 6 and 7	Conversion utilities are available from the EndNote Web site. Go to http://www.endnote.com/support/enconversion.asp .
EndNote Library	Go to the File menu in EndNote, choose *Open*, and then *Open Library*. Locate and *Open* the old EndNote library. The references will be copied into a new EndNote X1 library.
NoteBook II Plus and NoteBuilder	Conversion utilities are available from the EndNote Web site. Go to http://www.endnote.com/support/enconversion.asp .
Papyrus 6 and 7	Conversion utilities are available from the EndNote Web site. Go to http://www.endnote.com/support/enconversion.asp .
ProCite	See Creating a Library from ProCite.
Publish or Perish	A conversion utility is available from the EndNote Web site. Go to http://www.endnote.com/support/ enconversion.asp .
Ref-11	A conversion utility is available from the EndNote Web site. Go to http://www.endnote.com/support/ enconversion.asp .
Reference Manager	See Creating a Library from Reference Manager.
Refer/ BibIX	Use the *Refer/ BibIX* import option to import a Refer or BibIX text file.
RefWorks	See a description under Frequently Asked Questions at http://www.endnote.com/support/ ensupport.asp .

Importing PDF Files to Create New References

This feature allows you to convert existing collections of PDF files into EndNote references with minimal typing and copying by extracting Digital Object identifiers (DOI) from PDF files. The system matches DOI information with data available from CrossRef (www.CrossRef.org) by capturing bibliographic content and creating new EndNote references.

To import a PDF file:

1. Open the library into which you want to import the references.
2. From the File menu, choose *Import File*.
3. Click the *Choose* button to locate and open the file you want to import.
4. Select the needed PDF file and click *Open*.
5. Select the *PDF* import option from the Import Option list.
6. Select an option from the *Duplicates* list:

   Import All: Imports all references, including duplicates.

   Discard Duplicates: Imports all references except duplicates.

   Import into Duplicates Library: Duplicate references are imported into a library called File-Dupl.enl, where ”File" is the name of the library into which you are importing.

   By default, a reference is considered a duplicate when the Author, Year, Title, and Reference Type match a reference already in the library. See Duplicate Preferences if you would like to change the duplicates criteria.

7. Choose a *Text Translation* option. The default value is *No Translation*.

   This option allows you to specify the text character encoding of the file you import, so that extended characters transfer correctly. You should verify the setting with your database provider. Some U.S. databases that contain extended characters require *ANSI-Latin1* or *UTF8*. MARC format files may require *ANSEL* translation. You might be able to use *No Translation* for text files that do not contain any extended characters.

8. Click *Import* to import the file.

Note: When performing the import function, if there are two DOIs found in the first two pages of a PDF document, EndNote will put both DOIs in the DOI field. The PDF is then attached and the file name is put in the Title field.

When the import is complete, the new record is stored in the Imported References group, and will include bibliographic information given for the Digital Object Identifier (DOI) mined from the PDF file such as title, author, volume, issue, page, year, and DOI. This is a perfect time to add a keyword to the imported reference with the *Change Field* command, or to peruse the imported data to make sure it imported as expected. Make sure to check references that contain extended characters.

The Imported References group is a temporary group that is replaced each time you import another set of references. It is removed when you exit EndNote (although the references remain in the library).

To return all of your references to the library display (including the newly imported ones), choose *Show All References* from the *References* menu or click the *All References* group.

Importing PDF Folders to Create New Records

This feature allows you to convert existing collections of PDF files into EndNote records with minimal typing and copying by extracting Digital Object identifiers (DOI) from PDF files. The system matches DOI information with data available from CrossRef (www.CrossRef.org) by capturing bibliographic content and creating new EndNote records.

To import a PDF folder with PDF files:

1. Open the library into which you want to import the references.
2. From the File menu, choose *Import File*.
3. Click the *Choose* button to open the *Browse for Folder* dialog window.
4. Select the needed *PDF* folder, and then click *OK*.
5. If the selected folder lists sub-folders, click the *Include files in all sub-folders* radio button to include PDF files in those sub-folders in the import operation.
6. Select the *PDF* import option from the Import Option list.
7. Select an option from the *Duplicates* list:

   - *Import All:* Imports all references, including duplicates.
   - *Discard Duplicates:* Imports all references except duplicates.
   - *Import into Duplicates Library:* Duplicate references are imported into a library called File-Dupl.enl, where ”File" is the name of the library into which you are importing.

   By default, a reference is considered a duplicate when the Author, Year, Title, and Reference Type match a reference already in the library. See Duplicate Preferences if you would like to change the duplicates criteria.

7. Click *Import* to import the files in the selected folders.

Note: When performing the import function, if the are two DOIs found in the first two pages of a PDF document, EndNote will put both DOIs in the DOI field. The PDF is then attached and the file name is put in the Title field.

When the import is complete, the new record is stored in the Imported References group, and will include bibliographic information given for the Digital Object Identifier (DOI) mined from the PDF file such as title, author, volume, issue, page, year, and DOI. This is a perfect time to add a keyword to the imported reference with the *Change Field* command, or to peruse the imported data to make sure it imported as expected. Make sure to check references that contain extended characters.

The Imported References group is a temporary group that is replaced each time you import another set of references. It is removed when you exit EndNote (although the references remain in the library).

To return all of your references to the library display (including the newly imported ones), choose *Show All References* from the *References* menu or click the All References group.

Importing References from PubMed

Follow the steps below to download your search results from the PubMed Web site and to import them into your EndNote library.

1. Go to the PubMed Web site in your Web browser at http://www.ncbi.nlm.nih.gov/pubmed.
2. In the Search field, enter your search criteria to execute your search. Click the *Search* button.
3. On the Results page, select *Clipboard* from the "Send to" menu in the PubMed navigation bar to save records from multiple searches as you work (optional). You can also click the *Add to Clipboard* button to save the first 500 result.
4. Select the needed results and then select *File* from the "Send to" menu.
5. Select *MEDLINE* from the Format menu.
6. Select a sort order from the "Sort by" menu. The default sort order is Recently Added.
7. Click the *Create File* button. This will bring up a dialog box allowing you to save your selected references as a text file.
8. Click the *Save* button to save the file to your computer. Save the file somewhere easily accessible such as your desktop. The default file name is **pubmed_results.txt**. You may change the file name, but we recommend saving the file with the .txt extension.
9. In EndNote, open the library where you would like to save these references.
10. From the File menu, select *Import* to open a dialog window.
11. Click the *Choose* button, and then select the downloaded **pubmed_result.txt** file from your PC.
12. In the Import Option field, select *Other Filters*, and then select the import filter called *PubMed (NLM).*
13. Click the Choose button to go to the Import File dialog.
14. Click the *Import* button to import your references.
15. Look in your Groups panel to see a new group called Imported References. All the references that you downloaded from PubMed will appear in this group.

Note: In step 4, *do not* use File > Save from your browser as the file, along with the results, will not import.

Note: In step 7, if you have a popup blocker enabled, such as the one that comes by default from Windows XP Service Pack 2, you may need to disable the popup blocker temporarily to allow the PubMed Web site to send you the file.

Summary of Output Formats and Corresponding Import Options

A subset of the supported services and their recommended output formats and import filters are listed under Output Formats with Corresponding Import Options. At the time this manual was printed, these were the current format options for each information provider listed in the table. If you find that these formats have changed, please check the documentation from your information provider or contact us.

Before you download references from an online source, please consider copyright issues.

Copyright Issues and Fair Use of Downloaded Data
EndNote gives you the capability to import references downloaded from online databases into its libraries. Some producers of online reference databases expressly prohibit such use and storage of their data, others charge an extra fee for a license to use the data in this way. Before you download references from a database, be sure to carefully check the copyright and fair use notices for the database. Note that different databases may have varying restrictions, even from the same information provider (such as DIALOG or Ovid).

Direct Export from Web Pages

Certain Web sites contain a download button that will send your search results directly to EndNote, pick the correct import option, and start the import process automatically. All you need to do is choose the EndNote library into which the data should be imported. This "direct export" or "direct download" method does away with the additional steps of saving the references to a text file, and then importing that file with the appropriate filter. See Direct Export Formats for a list of systems that provide a direct export of references into EndNote. The list keeps growing, so check our web site at http://www.endnote.com for updates!

Copying and Pasting References from a Document into EndNote

If you have a bibliography that is too inconsistent or difficult to parse using your word processor (as suggested in Creating a Custom "Tagged" Format), you can use the *Copy* and *Paste* commands as an alternative method for getting your data into EndNote and still avoid a lot of re-typing. For example, let's say you have a paper with a bibliography entry such as:

> Blocker, C. E., R. H. Plummer and Richard C. Richardson. The Two Year College: A Social Synthesis. 1965.

To transfer the references into EndNote:

1. Open the list of references in a word processor.
2. Select a reference and copy it using the *Copy* command in your word processor's Edit menu. (Some word processors allow you to triple-click a paragraph to select the whole thing at once. That might be a useful shortcut for quickly selecting a reference.)
3. Open your EndNote library, and choose *New Reference* (Ctrl + N) from the References menu to create a new reference.

4. Put the cursor in the Title field of the new reference and choose *Paste* from the Edit menu.

This will paste the entire reference into the Title field of the Reference window. From here, you can drag-and-drop (or cut and paste) the individual pieces of data into their proper fields. Be sure to remove extraneous punctuation, and make sure author names are each on a separate line. Follow the guidelines for entering references. See Reference Type Preferences for information about setting a default reference type for new references.

Importing from CD-ROMS and Online Databases

Importing References Downloaded from CD-ROMs and Online Databases

If you have access to an online bibliographic database, a university catalog, or a bibliographic database on CD-ROM, you can probably use EndNote's import filters to import text files saved or downloaded from these sources. EndNote filters are configurable so they give you the flexibility to import the reference data you need, and eliminate data you do not need.

There are two main things you need to know in order to correctly import downloaded references into EndNote:

1. How to download the data in the right output format. See Getting Data in the Right Format.
2. Which import filter to use to import the data into EndNote. See Choosing the Correct Import Filter.

The table in Summary of Output Formats and Corresponding Import Options summarizes a number of common sources of bibliographic data, the instructions for downloading tagged files, and the EndNote import option to use to import the references into EndNote.

Getting Data in the Right Format

To import text with any of the EndNote filters, the data must be consistently "tagged," with each tag starting on a new line, and the file saved as text. Here are two examples:

```
AU- CRAMER, - Z.O.
TI- AQUATIC MACROPHYTES AND LAKE ACIDIFICATION
PY- 1993
SO- ENVIRONMENTAL-POLLUTION. VOL. 5, NO. 2, PG.54-79
DE- LAKES, ACIDIFICATION, ENVIRONMENTAL EFFECTS, MACROPHYTES, ECOLOGY,
PLANT PHYSIOLOGY

Author:    Cramer, ZO
Title:    Aquatic macrophytes and lake acidification
Year:     1993
Source:   Environmental Air Pollution. Vol. 5(2) pp.54-79
Keywords: lakes--acidification--environmental effects-- macrophytes--
ecology--plant physiology
```

Note: If data is inconsistently tagged, or poorly delimited, it may not be possible to import all the data accurately. See A Comment About Difficult Data Files.

If references are sent to you in the body of an email, save the email to a plain text file. You will import the text file.

Choosing the Correct Import Filter

Once you have captured and saved your data file in the appropriate format, you should identify the proper EndNote filter to import the data. There are hundreds of filters included with EndNote, each designed to read a specific tagged format from a specific information provider.

To see a complete list of available filters, choose *Import Filters* from the Edit menu, and select *Open Filter Manager*.

Use the *Find by* button in the Filter Manager window to find all filters for a particular information provider. To search by name, use the Quick Search text box on the EndNote toolbar. You can click the *Info* triangle button to display additional information about the filter. The Comments section may give critical information about how to appropriately download information from the source database.

When you have located the filters that you want to use, mark them as your favorites by clicking the check box to the left of the filter name. You can also mark all of the filters currently showing after using the *Find* option by clicking *Mark All*. Once a filter is marked as a favorite, it will appear in the Import Options list in the import dialog.

Note: There are many more databases and services that provide data than there are filters included with EndNote, so in some cases you may need to write your own filter or modify one of ours. See Introduction to Filters for information about creating and modifying filters. You can also check our Web site periodically for new and updated filters (http://www.endnote.com).

Comparing a Filter to a Data File

If you are uncertain whether a filter matches a data file that you have downloaded, you can compare the format from your downloaded data file to a filter. To do so, select a filter in the Filter Manager, and click the *Edit* button. When the Filter window opens, select the *Templates* option in the list at the left of the window to display the tags recognized by that filter.

The tags and templates in the filter should match the data in the file you want to import. See The Basic Components of a Filter for information about editing filters.

Changing the Filter Folder

By default, all filters provided with EndNote are stored in the Filters folder found in the EndNote X4 program folder. These are the filters displayed when you open the Filter Manager. EndNote also displays filters found in your personal Filters folder.

When you create a new filter, it is saved to your personal Filters folder. When you attempt to save changes to an existing filter, you must use *Save As* to save a copy to your personal Filters folder. For more information about your personal folders, and information about how to change the location of your personal folders, see Folder Locations Preferences.

Creating Files That EndNote Can Import

Creating Structured Text Files that EndNote Can Import

What do you do if your data is *not* in a format that EndNote can automatically import? You can do one of several things (or even a combination these options):

- Rearrange the reference data using your word processor so that it is in a format that EndNote can import (one of the two options listed at the end of this topic).
- Copy and paste each piece of data from its source into the proper fields in EndNote, as described in Copying and Pasting References.
- Enter the data manually by typing it into EndNote as described in Entering References.

Creating a file that EndNote can import can be a lot of work if your data is in an arbitrary or inconsistent format. If you only have a few references to import (less than 30 or 40), it might be faster and easier to retype them or copy and paste the references than to try to put them into a format that EndNote can import.

However, if you have many references to import, it might save time to first manipulate the data in a word processor as best you can, and then import the references into EndNote and clean up the references there. Even if the imported data does not come through perfectly, it can be rearranged with EndNote's various commands, drag-and-drop, and copy and paste.

These are two different formats that you can put your data into such that it can be imported into EndNote:

- A tab-delimited format (best if your data is in a database or spreadsheet that can export to a tab-delimited file)
- A tagged format (best for when your data is in a word processor document and looks like a bibliography)

Note: To allow for the appropriate import of Unicode characters, save TextEdit files as "Western (Mac OS Roman)," and save Microsoft Word files as "Unicode Text (UTF-8)." If the appropriate option does not appear on the Save dialog, you can first select it under *Preferences*.

Creating a Tab-Delimited Format

The *Tab-delimited* import option can import text files in which each reference is separated by a paragraph mark (¶), and the fields within a reference are separated by tabs. Most databases or spreadsheets can export a tab-delimited text file.

Preparing the Data Before Exporting

Author Names:
Before you export data from a database or spreadsheet into a text file, we recommend that you separate multiple author names with a semicolon (;) or two forward slashes "//", such as: McCartney, P.//Harrison, G.// Lennon, J. If you cannot easily do this in your database, you can do it after exporting, or manually edit the data after it is in EndNote.

Reference Types:
If possible, you should make sure that each of your references includes a field indicating the reference type. Use EndNote's Reference Type names so that EndNote is able to recognize the formats. If you have only one type of reference (such as Journal Articles), it is not necessary to do this—the import settings can indicate that all references should be imported as journals by default.

If you cannot label each reference with the appropriate Reference Type name, you should export your data into separate files based on reference type. This makes it easy to preserve the original reference types of the references when importing the data files into EndNote.

Preparing the Data File for Import

Once the tab-delimited file(s) are generated, you must open each file in a text editor or word processor and add two lines to it. These lines tell EndNote what the default reference type is for the data, and how the data should be interpreted.

First Line: The Default Reference Type

The first line of the file must define the default reference type for the entire file. The format for the first line is an asterisk immediately followed by a valid EndNote reference type, followed by a paragraph mark (¶). For example,

*Journal Article < ¶>

A file of journal articles might look like this:

*Journal Article< ¶>
Author <tab> Year <tab> Title <tab>
Journal <tab> Volume < ¶>
Jones, J// Shoe, S <tab> 1994 <tab> Easy Food <tab> J. of Eating <tab> 1 <

¶>
Woo, W //Lee, L <tab> 1995 <tab> Rain Hats <tab> J. of Clothing <tab> 2 <
¶>
Carlos, C//Luis, L <tab> 1991 <tab> Cat Talk <tab> J. of Animals <tab> 3 <
¶>

If you could not make separate files based on reference type, you can specify each reference type individually within one file. In this case, your first line must be the list of field names found in the Generic reference type, starting with a field for "Reference Type." Then you can use the additional "Reference Type" column to define the actual EndNote reference type names. For example:

Reference Type <tab> Author <tab> Year <tab> Title <tab> Secondary Title < ¶>
Journal Article <tab> Jones, J// Smith, S. <tab> 1994 <tab> Easy Pie <tab> J. of Eating < ¶>
Book Section <tab> Woo, W. //Lee, L. <tab> 1995 <tab> Rain Hats <tab> J. of Clothing < ¶>
Report <tab> Carlos, C.//Luis, R. <tab> 1991 <tab> Cat Talk <tab> J. of Animals < ¶>

Note: The "<tab>" and "< ¶>" characters are used to indicate where an actual tab and paragraph mark should be entered; the literal text "<tab>" and "< ¶>" should not be typed.

Second Line: EndNote Field Names

The second line of the tab-delimited file must contain the actual field names used by EndNote into which you want the data imported. The order of the fields names does not matter, as long as they correspond to the order of the data in the rows beneath them and correspond to the names of the default reference type.

For example, if your default reference type is "*Journal Article," then the field names in the second line of your file will be those of the Journal Article reference type:

*Journal Article< ¶>
Author <tab> Year <tab> Title <tab> Journal <tab> Volume < ¶>
Jones, J// Shoe, S <tab> 1994 <tab> Easy Food <tab> J. of Eating <tab> 1 <
¶>
Woo, W //Lee, L <tab> 1995 <tab> Rain Hats <tab> J. of Clothing <tab> 2 <
¶>
Carlos, C//Luis, L <tab> 1991 <tab> Cat Talk <tab> J. of Animals <tab> 3 <
¶>

Note: The field names must be separated by tabs, and a paragraph mark must follow the last field name.

Additional Considerations

ANSI, ASCII, or UTF-8 formatted text files can be imported. This means that, typically, no font styles or text styles can be preserved during import.

All field names and reference type names in the file must be identical to those in EndNote. See the List of Reference Types for a listing of all of the reference types and field names. If you have custom reference types, you may check them by choosing *Preferences* from the Edit menu, selecting *Reference Types*, and clicking the *Modify Reference Types* button.

Multiple author names should be separated by semicolons (;) or by two forward slashes (//).

Fields cannot contain tabs or paragraph marks. Let the lines of data "wrap" to the next line.

Leading and trailing spaces are removed during importing.

No upper/lower case conversion is made during importing.

A reserved field name called "Unused" may be used for data that you do not want imported into EndNote.

Errors While Importing Tab-delimited Files

When you are ready to import this file into EndNote, choose *Import* from the File menu, and select *Tab-Delimited* as your import option. See General Importing Instructions.

If EndNote cannot import a record or a field within a record, it will alert you to the error. There are three basic alerts:

Bad Default Reference Type — The default reference type that you specified in the first line of the file is not a valid EndNote reference type name. (The problem can be as simple as extra spaces after the reference type name in your text file.)

Bad Field Name — A field name that you entered in line 2 of the file is not a valid EndNote field name.

Missing Reference Type Information — There is no default reference type specified for the file and there is no reference type field defined for the references.

If you get one of these error messages during the import process, open the import file in your word processor, correct the problem, save the file as a text file, and try again.

Creating a Custom "Tagged" Format

If you have a large bibliography that you would like to import into EndNote, it may be possible to use your word processor's *Find* and *Replace* commands to insert descriptive tags in front of some of the fields of data so that EndNote can accurately import the references. In addition to adding tags, you also need to make a filter to read your tags. (See Choosing the Correct Import Filter for information about using a predefined EndNote Import format if you would rather not create your own filter.)

This topic outlines the basic steps to convert a bibliography into a tagged text file.

Step I. Save a Copy of Your File

- Open your bibliography in a word processor and save a copy of the file with a new name (this is your backup).
- Remove everything but the reference data from the file.

Step II. Add Descriptive Field Tags

Use your word processor's *Find* and *Replace* commands to search for unique delimiters between fields, and insert paragraph marks and descriptive field tags in front of specific fields. For this example, we will show a very simple case where only the start of each reference is tagged, and the filter does the rest of the work. This works well for reference lists that have clear delimiters separating the individual components of the reference (author, year, title, etc.). In some cases, you may have better results making additional replacements in the text file before importing. The more tags you add to your data, the greater degree of accuracy you can get with the import filter.

Suppose your references look like this:

Jones, M. C. and Harrison, G. (1990) "Planet X" Icarus. Vol. 3 no. 4, pp. 11-23.

Billoski, T.V. (1990) "Greenhouse hypothesis" Extinction. Vol 2 no. 1 pp. 12-18.

The process of converting this bibliographic format to a tagged format would be something like this:

Search for 2 paragraph marks (since the references are separated by 1 blank line), and replace with two paragraph marks and a tag "XX-" followed by a space.

The result is a tagged data file that looks like this:

XX- Jones, M. C. and Harrison, G. (1990) "Planet X"
Icarus. Vol. 3 no. 4, pp. 11-23.

XX- Billoski, T.V. (1990) "Greenhouse hypothesis"
Extinction. Vol. 2 no. 1 pp. 12-18.

Once you have made all the changes to tag as much of the data as necessary, save the file (as a plain text file), and create an import filter to match the tags and formats of the references.

Step III: Create a Filter

Using EndNote, create a new filter to read your data file (see Creating a New Filter). The template of a filter for the above data file would look like this:

Tag	Field
XX-	Author (Year) "Title" Journal. Vol. Volume no. Issue, pp. Pages

Note: Each field listed for the Tag must appear in each of your references. If a reference is missing any of the fields, the entire reference will not be imported into your EndNote library.

Step IV: Clean Up the Data

After you set up your file with tags and create a filter to import it, you should test and refine the filter by importing into a new library. Once your filter is working as you would like it, you can use it to import the data file into your real EndNote library.

If you cannot get the filter to import everything exactly as you want, you may have to do some manual editing to correct this either before or after importing the data into EndNote. You might find it useful to import into a test library, then use the *Change and Move Field*s commands in EndNote's References menu and the *Change Text* command in EndNote's Edit menu to clean up the data. Then, transfer these references to your real library with drag-and-drop, copy and paste, or the *Import* command.

Creating a Tagged EndNote Import File

The EndNote Import format is a tagged format based on the rules of Refer/ BibIX format. In this format, each field of data (i.e., Journal, Volume, or Title) is preceded by an identifying tag: a percent sign (%) followed by a single capital letter. Entire references are separated by one blank line:

%0 Book
%A Geoffrey Chaucer
%D 1957
% T The Works of Geoffrey Chaucer
% E F. N. Robinson
%I Houghton
% C Boston
% N 2nd

%0 Journal Article
%A Herbert H. Clark
%D 1982
% T Hearers and Speech Acts
%B Language
%V 58
%P 332-373

%0 Thesis
%A Cantucci, Elena
% T Permian strata in South-East Asia
%D 1990
%I University of California, Berkeley
%9 Dissertation

Author Names in the EndNote Import Format

Author names use the %A tag. This tag should repeat for each author, with the names listed one per line:

%A Jones, Mary
%A Simon, Jeff

Author names can appear either as:

Geoffrey Chaucer **or** Cohen, Sarah

Either initials or full names are accepted.

Defining Reference Types

Set the reference type for each of the imported references by using %0 (zero) and the reference type name.

The default reference types are listed below. If you have modified a reference type, your EndNote data files should use the new name instead.

%0 Generic	%0 Government Document
%0 Aggregated Database	%0 Grant
%0 Ancient Text	%0 Hearing
%0 Artwork	%0 Journal Article
%0 Audiovisual Material	%0 Legal Rule or Regulation
%0 Bill	%0 Magazine Article
%0 Blog	%0 Manuscript
%0 Book	%0 Map
%0 Book Section	%0 Newspaper Article
%0 Case	%0 Online Database
%0 Catalog	%0 Online Multimedia
%0 Chart or Table	%0 Pamphlet
%0 Classical Work	%0 Patent
%0 Computer Program	%0 Personal Communication
%0 Conference Paper	%0 Report
%0 Conference Proceedings	%0 Serial Publication
%0 Dictionary	%0 Standard
%0 Edited Book	%0 Statute
%0 Electronic Article	%0 Thesis
%0 Electronic Book	%0 Unpublished Work
%0 Encyclopedia	%0 Web Page
%0 Equation	%0 Unused 1

%0 Figure	%0 Unused 2
%0 Film or Broadcast	%0 Unused 3

EndNote Tags and Corresponding Fields

The table below shows the tags recognized in the EndNote Import format, and the corresponding EndNote field into which each tagged item is imported.

The table below shows the tags recognized in the EndNote Import format, and the corresponding EndNote field into which each tagged item is imported for the Generic reference type. For other reference types, many fields may be mapped to the Notes field (since a limited number of fields are included in each reference type). The Figure field is not included for importing

Tag	EndNote Generic Field Name
%A	Author
%B	Secondary Title (of a Book or Conference Name)
% C	Place Published
%D	Year
% E	Editor /Secondary Author
% F	Label
% G	Language
%H	Translated Author
%I	Publisher
% J	Journal Name
% K	Keywords
% L	Call Number
% M	Accession Number
% N	Number (Issue)
%O	Alternate Title
%P	Pages
% Q	Translated Title
%R	DOI
%S	Tertiary Title
% T	Title
%U	URL
%V	Volume
% W	Database Provider
%X	Abstract
% Y	Tertiary Author / Translator
% Z	Notes
%0	Reference Type

%1	Custom 1
%2	Custom 2
%3	Custom 3
%4	Custom 4
%6	Number of Volumes
%7	Edition
%8	Date
%9	Type of Work
%?	Subsidiary Author
%@	ISBN/ISSN
%!	Short Title
%#	Custom 5
%$	Custom 6
%]	Custom 7
%&	Section
%(	Original Publication
%)	Reprint Edition
%*	Reviewed Item
%+	Author Address
%^	Caption
%>	File Attachments
%<	Research Notes
%[	Access Date
%=	Custom 8
%~	Name of Database

Searching and Sorting in EndNote

Showing and Hiding References

Showing and Hiding References

When working with references in your EndNote library, you can view all of the references or just a subset. For example, if you search for references and find 10 matching references, only those 10 references will appear in the reference list. In a library that contains 210 references, the words "Showing 10 out of 210 references" will appear at the bottom of the library window. For more information about selecting references and working with showing references, see:

- Selecting References
- Working with Showing References
- Using Show Selected and Hide Selected

Working with Showing References

Some EndNote commands (such as *Search Library*, *Change Field, Change Text, Sort*, *Print*, and *Export*) can work with just those references that are "showing" in the Library window. Here are a few examples of operations that you can do with the showing references:

- Restrict the *Search Library* command to search only the showing references. (Choose "Search showing references" on the Search tab.)
- Add the results of a new search to the currently showing references, as a way to combine search results. (Choose "Add to showing references" on the Search tab.)
- Use the *Change Text,* and *Change Field,* and *Move Field* commands to modify only the showing references.
- Use the term lists' *Update List* command to scan only the showing references for new terms.
- Create a Subject Bibliography from the showing references.
- *Print* or *Export* only the "showing" references.

One way to view a subset of references is to use the Search Library command. The Show Selected References and Hide Selected References commands in the References menu provide another convenient way for you to control which references are showing in the Library window.

Using Show Selected and Hide Selected

Use the *Show Selected References* command to restrict the references showing in the Library window to only the selected references.

To use the *Show Selected References* command:

1. Select the references of interest (hold down the Ctrl key and click the references with the mouse, or hold down the Shift key to select a range of references).
2. Choose *Show Selected References* from the References menu. The references that you had selected will now be the only ones showing in the Library window.
3. After completing the work you need to do with the showing references, choose *References>Show All References* (Ctrl +M) to display all references in the Library window.

The *Hide Selected References* command is similar to the *Show Selected References* command except that it temporarily hides the selected references in the Library window from view.

To use the *Hide Selected References* command:

1. Select the references that you want to temporarily hide.
2. Choose *Hide Selected References* from the References menu.
3. After you have completed your work with the showing references, choose *Show All References* (Ctrl +M) from the References menu to return all of the references to the Library window.

Searching for References

Searching for References

EndNote provides a powerful and flexible *Search Library* command that enables you to locate specific references or groups of references. For example, you can choose a very general search, one that scans the entire library, or you can limit your searches to specific fields (such as Author or Keywords). You can also create more complex searches using a variety of operators such as *And*, *Or*, *Not*, *Greater than*, *Less than*, and others.

You can use the Search tab to search EndNote libraries as well as remote databases that are available online. See Quick Overview of Online Database Searching for information about online database searches.

These topics will help you in your searching:

- Quick Search
- The Search Tab
- Search Command Tips
- Simple Searches
- Restricting Searches to Specific Fields
- Using Comparison Operators
- Combining Search Lines with "And," "Or," and "Not"
- Combining Results from Separate Searches
- Saving Search Strategies
- Creating a Smart Group from an Existing Search Strategy

Quick Search

To quickly search your entire library, use the Quick Search text box on the Main toolbar.

With your library list displayed, enter a word or phrase and press Enter. EndNote executes a general search of all fields. You can use the drop-down list to select a recent search term.

If you need a more specific or complicated search, use The Search Tab.

The Search Tab

To begin a search, display the group of references you want to search and then choose *Search Library* (Ctrl +F) from the Tools menu or click the Search tab in the Tab pane. The Search tab appears, displaying several empty search lines (you can add more if necessary).

Quick Overview of the Search Tab

Search Line

A search line includes the field to be searched (from the *Field* list), the comparison operator, and the text to be found (the "search term"). Use the plus or minus buttons to the right of each search line to insert or delete a line.

Field List

The Field list allows you to restrict your search to a particular field—such as Author, Year, or Keywords—or all fields. By default, the Field lists are set to search Author, then Year, then Title.

You can also restrict your search to PDF files attached to your references by selecting *PDF* from the field list. The *Any Field + PDF* option allows your to search *any field* within a reference and PDF files.

See Restricting Searches to Specific Fields for more information.

Comparison List

Choose an item from the Comparison list to indicate how the search term should relate to the field(s) being searched. For example, EndNote can find references in which the Journal Field begins with "science," the Journal field Contains "science" anywhere in the field, or the full Journal name actually Is "science." See Using Comparison Operators.

Search Term

The search term is the word or phrase that you want to locate. Use the *Options* button at the bottom of the Search tab to insert a Tab or Carriage Return in the search line.

Asterisk (*) Wildcard

Use the asterisk (*) wildcard to broaden your search results. The asterisk represents any group of characters. Below are some rules about wildcards.

- Fields (and PDF files) can be searched using the * wildcard.
- No minimum character length is required.
- Stopwords do not apply so **th*** finds the word "the".
- Both right- and left-hand truncation is allowed. For example, in an Author search, ***llen** finds Allen (as a last name) and Ellen (as a first name).
- Phrase searching is allowed. For example, **global warm*** will find the phrase *global warming* in a search.

Boolean Operator List

The "And," "Or," and "Not" list between the search lines indicates how the search lines are to be combined. See Combining Search Lines with "And," "Or," and "Not."

Search Set List

Use the search set list to specify the set of references to search and how the search results should be combined with other references in the Library window. By default, EndNote searches the group of references currently displayed, and then shows only the results of the search.

Match Case

By default, EndNote ignores capitalization when searching for text in a library. For example, a search for the text "paleontology" also finds "Paleontology."

When the "Match Case" option is checked, EndNote finds only those records in which the search term is capitalized exactly as you typed it on the Search tab. For example, if your search term is "AIDS" and you select "Match Case", EndNote ignores the word "aids" and finds only the acronym "AIDS."

When the "Match Case" option is checked, a search for specific diacritical marks such as é, ü and î will match those letters exactly. Thus, a search for "résumé" will not find "resume." If you want to find all variations of a letter, deselect the "Match Case" option.

Match Words

With "Match Words" selected, EndNote finds only exact matches to the search term, rather than partial-word matches. For example, a search for the term "state," with the "Match Words" option selected, finds references with the word "state" while ignoring words like "statehood" or "understated."

Save Search and Load Search

If you frequently use the same search strategies on the Search tab, you can use the *Options* button to save these searches and later load them when you need them. See Saving Search Strategies.

Set Default and Restore Default

Click the *Options* button and select *Set Default* to save the configuration of all of the items on the Search tab except for the search terms. Click the *Options* button and select *Restore Default* at any time to return the tab to that configuration. See Search Command Tips.

Search Command Tips

Canceling Searches

Pressing Esc cancels a search in progress.

Matching Partial Words

Unless you have selected the "Match Words" option, EndNote matches partial words when searching for text (both right- and left-truncation are enabled). Consequently, you can search for just the root of a word and find all related terms. This is a good tactic for general subject searches. Select an appropriate comparison operator such as "Field begins with" or "Word begins with" to apply truncation to your search term.

Diacritics (Accents)

To search for specific diacritical marks, select the "Match Case" option; letters such as é, ü and î will match those letters exactly. Thus, a search for "résumé" will not find "resume." If you want to find all variations of a letter, deselect the "Match Case" option. See Entering Special Characters for information about entering diacritics.

Finding Tabs and Carriage Returns

Use the *Options* button to insert a Tab or a Carriage Return in the search line.

Searching for Numbers

When you search for a number, EndNote looks for that string as text, exactly, in your reference text. For example, a search on "Any Field" which "Contains" the search text "0025" will match the numbers 00025 and 0025, but it will not match 25.

There is an exception for record numbers. Record numbers, which are assigned by EndNote, cannot include leading zeros. When you search Any Field for a number, EndNote looks for an exact match in all text fields; however, leading zeros are stripped from your search text before comparing it to record numbers. Only an exact match of a record number will be returned. So, a search for "0025" will match record number 25. It will not match record number 250.

Searching with Multiple Libraries Open

The *Search Library* command searches one library at a time. View the library you want to search, and use the Search tab on the Tab pane.

Author Fields

The field names in the *Field* list are EndNote's "Generic" field names, which means that *Author* represents Reporter, Editor, Artist or any other variations of the Author field used in the different reference types.

If you wish to search for author initials, make sure to include a space between the first and second initial. For example:

Smith, J P

If you do not include a space between initials, EndNote will assume that JP is a complete first name.

To limit your search, select the Match Words check box. For example, a search for "Smith, J P" with Match Words selected will find only those works with "Smith, J P" in the Author field. A search for "Smith, J P" without Match Words selected will also find references by authors such as "Smith-Wilkins, Jeremiah."

The Year Field

When searching in the Year field, a search for "1994" retrieves only references published in 1994, where as a search for "94" retrieves references from the 1940s and 1994.

Finding Empty Fields

EndNote can search for empty fields. Choose the desired field from the Field list, choose *Is* as the comparison operator, and leave the search term blank. Click *Search* and EndNote finds references in which the chosen field is blank.

Finding File Attachments

You can easily search for a specific file attachment by name. Search for:

File Attachments Is [name of the file]

To search for all references that include file attachments, enter these two search lines:

	Record Number	Is greater than or equal to	1
NOT	File Attachments	Is	[blank]

The first line ensures that all references are searched, and the second line looks for references in which the File Attachments field is not blank.

Note: Another easy way to see references with file attachments is to simply click on the paper clip header in the Library window to sort those references at the top of the list of references.

Cleaning Up Search Results

After executing a search, there may be a handful of references that you want to exclude from the search results. Select those references and choose *Hide Selected References* to hide them from the set of found references and display exactly the references that you want. Often this is much easier than trying to refine your search.

Viewing the Opposite of Your Search Results

Let's say that you have searched for all of the references written by Billoski or Hall, so you are currently viewing only those references. Now, you would like to view the references *not* written by those authors. Instead of doing another search:

1. Click in the list of references, and from the Edit menu, choose *Select All* (Ctrl +A) to select all of the Hall and Billoski references.
2. From the References menu, choose *Show All References* (Ctrl +M) (notice that the original selection is maintained).
3. From the References menu, choose *Hide Selected References*.

You are left viewing only those references that were not previously showing in the Library window, that is, all references *not* written by Hall or Billoski.

Setting and Restoring Defaults for the Search Tab

Click the *Options* button and select *Set Default* to save the current configuration of the Search tab as your default. The default configuration will appear whenever you first display the Search tab.

The layout of the window (such as the number of search lines) is saved, as are all of the operators, field names, and the Match Case and Match Word settings. The search terms are not saved.

Click the *Options* button and select *Restore Default* o n the Search tab to clear out all of the search terms currently entered in the Search tab, and reset all of the settings back to the default configuration.

Simple Searches

Using Quick Search:

On the toolbar, type a search term into the Quick Search text box and press Enter to search all references. See Quick Search.

Using the Search tab to find all references that contain a particular term:

1. Display All References to make sure you are searching your entire library.
2. From the Tools menu, choose *Search Library* (Ctrl + F). Or, click on the Search tab in the Tabs pane.
3. Set the search field to *Any Field* and the comparison list to *Contains*.
4. Type the desired text into the first search line.
5. Click *Search* to begin the search.

If no references in the library match your search request, EndNote displays "No matching references were found." Otherwise, all matching references are displayed in the Library window. (Click on a column header to apply a sort order).

When you are finished working with the found references, click the All References group or choose *Show All References* (Ctrl +M) from the References menu to restore all references to view, or start another search.

After completing a search, EndNote displays the same library that you were viewing before the search, however only the references that match your search requests are showing.

The references found in the last search operation are saved in a temporary Search Results group. Each time you run a search, the temporary Search Results group is updated with the new set of references. When you close the library, this temporary group is discarded.

Restricting Searches to Specific Fields

Use the Field list on the Search tab to narrow your search to a specific field. You can select *Any Field* to look for a match for the search term in any of the fields in your references.

For example, to find references published in 2002, restrict the search to the Year field to avoid finding entries that include "2002" in the abstract, title, or elsewhere.

The field names in the Field list are EndNote's "generic" field names. For example, *Author* represents Reporter, Editor, Artist or any other variations of the Author field used in the different reference types. See the Generic reference type for a complete list of generic field names and their corresponding field names in each reference type.

EndNote can import references from hundreds of sources, each of which uses its own set of field names. Once you have transferred references into EndNote, you will search for information by using the destination EndNote generic field names, and not the original field names from the information provider. For example, the PMID number from PubMed typically transfers into the Accession Number field in EndNote. To search for a specific PMID in EndNote, search the Accession Number field.

Note: Do not use quotation marks (" ") when searching fields within an EndNote library. EndNote will not return any references if you enclose your search terms within quotation marks.

Searching Any Field + PDF

You can search all fields and attached PDF files in your selected reference list.

1. Select *Any Field + PDF* from the Field list.
2. Choose an item from the Comparison list to indicate how the search term(s) should relate to the search.
3. Enter the search term(s) that you want to locate. For example, you can enter a single term or a string of terms
4. Click the *Search* button.

By default, EndNote ignores capitalization when searching for text. For example, a search for the text *hospital* also finds *Hospital*.

If you enter a phrase, EndNote will retrieve references that contain the words you entered in *any field* or in a PDF document. The words will appear together if they are in any EndNote field, and may or may not appear together in the PDF file. For example the query, **hospital care** retrieves references containing *hospital care* in the EndNote fields or *hospital* and/or *care* anywhere in a PDF file. Quotation marks (" ") in a search using *Any Field + PDF* will be searched as characters.

Note: Match Case and Match Word rules apply when these options are selected. See The Search Tab for more information about these features.

Searching PDF Files

You can search PDF files attached to your references by selecting *PDF* from the field list.

1. Select *PDF* from the Field list to restrict your search to just PDF files.
2. Choose an item from the Comparison list to indicate how the search term(s) should relate to the PDF search.
3. Enter the search term(s) that you want to locate. For example, you can enter a single term or a phrase.
4. Click the *Search* button.

By default, EndNote ignores capitalization when searching for text. For example, a search for the text *hospital* also finds *Hospital*.

If you enter a phrase, EndNote will retrieve references that contain either term. For example, the query **hospital care** retrieves references in which the term *hospital* and/or *care* appears anywhere in the PDF file.

To search for an exact phrase, enclose the phrase in quotation marks. For example, the query **"hospital care"** will retrieve records that contain this exact phrase.

Using Comparison Operators

Comparison Operators

The "comparison operators" are used to indicate how the search term relates to the chosen field in that search line. For example, if you have a search line that looks like this:

Field	Comparison Operator	Search Term
Title	Contains	Dinosaur

You will be searching for references where the Title (the search field) *contains* (the comparison operator) dinosaur (the search term).

The comparison operators function as follows:

Contains: finds all references where the search field includes the search term. The search term includes both left and right truncation, so a search for "house" would find "house," "greenhouse," and "household" anywhere in the field. If you want to limit the search specifically to the word "house," check the *Match Words* box on the Search dialog.

Note: Comparison operators other than "Contains" cannot be used when searching online databases.

Is: finds all references in which the entire content of the search field is exactly the same as the search term.

Is Less Than: finds all references in which the search term is less than the contents of the search field.

Is Less Than or Equal To: finds all references in which the search term is less than or identical to the contents of the search field.

Is Greater Than: finds all references in which the search term is greater than the contents of the search field.

Is Greater Than or Equal To: finds all references in which the search term is greater than or identical to the contents of the search field.

Note: For all of the "Greater Than" and "Less Than" comparisons, the comparison is either numerical or alphabetical based on the nature of the term. When the fields have both numbers and letters, numbers are considered "less than" letters, and empty fields are ignored.

Field Begins With: finds all references in which the search term is found at the beginning of the selected field (also referred to as right field truncation). The search term can be a partial word, a full word, or several words, and will be compared to the initial text in the field. If you enter more than a single word, remember that punctuation and spaces are significant, so you must enter exactly what is found in the reference. If you do not want to match partial words, check the *Match Words* box.

Field Ends With: finds all references in which the search term is found at the end of the field (also referred to as left field truncation). The search term can be a partial word, a full word, or several words, and will be compared to the ending text in the field. If you enter more than a single word, remember that punctuation and spaces are significant, so you must enter exactly what is found at the end of the field. If you do not want to match partial words, check the *Match Words* box.

Word Begins With: finds all references in which the search term is found at the beginning of a word anywhere in the field (also referred to as right word truncation). Punctuation and spaces are ignored. This can help you find words that start with the same root. For example, searching for a word that begins with "land," would also find "landing" and "landfill," but not "Iceland" or "island."

Note: The "Field begins with," "Field ends with," and "Word begins with" comparisons all treat Author fields like any other field. There is no manipulation of surnames and first names; EndNote simply looks at the literal string of text in the field.

Examples of Comparison Operators in Searches

Field	Comparison Operator	Search Term	EndNote finds:
Year	Is greater than	2000	all references published after 2000
Year	Is less than	2000	all references published before 2000
Year	Is greater than	1998	references published during or after 1998

	or equal to		
Title	Is less than	A	all references where titles start with a number
Author	Is less than or equal to	C	all references with authors whose last names begin with A, B, or a number; this would not match a name such as "Carter," as " Ca" is greater than C
Author	Is greater than or equal to	S	all references with authors whose last names begin with S-Z
Title	Contains	hawaii	all references with " hawaii" in the title
Title	Is	hawaii	all references with " hawaii" as the exact title
Abstract	Is		all references with no abstract (empty field)
Title	Field begins with	sediment	all references where titles start with "sediment," including "Sediments," and "Sedimentation," but not " Synsedimentary"
Abstract	Field ends with	dinosaur	all references where abstracts end with "dinosaur," which would include "duck-billed dinosaur," but not "dinosaur extinction" or "dinosaurs"
Any Field	Word begins with	house	all references where any field includes a word that begins with "house," which would include text such as "U.S. House of Representatives" and "household," but not "greenhouse"

Combining Search Lines with "And," "Or," and "Not"

You can combine search lines on the EndNote Search tab with the Boolean operators "And," "Or," and "Not" to produce the following effects:

And finds references that match the preceding search line(s) and the following search line. "And" narrows search results.

Example: A search for "triceratops" *And* "extinction" finds only those references that mention both terms.

Or finds references that match either the preceding search line(s) or following search term. "Or" broadens the search.

Example: A search for "triceratops" *Or* "extinction" finds all references that include either term.

Not finds all references containing the preceding term(s) and then omits references that contain the subsequent term. "Not" narrows search results.

Example: A search for "triceratops" *Not* "extinction" finds all references including "triceratops," excluding any triceratops references that mentioned extinction.

You can use the Boolean operators ("And," "Or," and "Not") in sequence with as many as nine search lines to build your search strategy.

Items in combination searches are executed from the top to the bottom of the Search tab. For example, if you have entered four search lines on the Search tab, EndNote carries out the search by combining the results of the first two items with the third search line. Those results are combined with the fourth search line to produce the final search results.

Adding or Deleting Search Lines

You can add or delete search lines by using the plus and minus buttons next to each line. Click the minus button (-) next to the line you want to delete. Click the plus button (+) to add a line below the current line.

Combining Results from Separate Searches

By default, EndNote searches the current group and then displays *only* the results of the search in the Library window. To search only a subset of references, or to combine your search results with other references, choose one of the following options from the Search Set list on the Search tab.

Search Whole Library/Search Whole Group

If All References or one of the automatic temporary groups are displayed in the reference list, the first item in the search set list (and the default setting) is *Search Whole Library*. The tab itself is titled “Search.” Use the *Search Whole Library* setting to make sure you are searching every reference in your library.

If the reference list displays a Custom Group, Smart Group, Online Search group or EndNote Web group, the first search set item is *Search Whole Group*. Use this setting to limit your search to a specific group of references. The title of the Search tab changes to Search plus the name of the group, such as “Search-Literature.”

Add Search Results to Currently Showing References

Choose *Add to showing references* if you want to search the whole library and add the results of your search to a subset of showing references. For example, if you have already found a group of references written by Komar in 2000, and now you want to add all references written by Billoski in 1997:

1. From the Tools menu, choose *Search Library* (Ctrl + F).
2. Enter "Billoski" in Author *And* "1997" in Year.
3. From the Search Set list, choose *Add to showing references*.
4. Click *Search* and you should see the combined results of the two searches.

Search Only the "Showing" References

Select the *Search showing references* option in the Search dialog to restrict a search to only those references that are currently displayed in the Library window.

This is useful to narrow the results of a previous search, to search a saved group of references, or to search a set of references that you have just imported from another library or online database.

Omit Search Results from Showing References

Choose the *Omit from showing references* option to hide the results of a search from the references that are showing in the Library window. This is a convenient way to locate all references that *do not* include a particular term or to narrow the results of a previous search. For example, to find all references *not* about extinction:

1. With all of the references showing in the Library window, choose *Search Library* from the Tools menu.
2. Choose *Omit from Showing References* from the Search Set list on the Search tab.
3. Type "extinction" into the first search line, leaving the *Field* list set to *Any Field*.
4. Click *Search*.

EndNote displays every reference except those that contain the word "extinction."

Saving Search Strategies

The Save Search and Load Search commands accessed with the *Options* button allow you to save the settings currently on the Search tab and recall them for later use. Most of the options on the Search tab are saved, including the search terms; however, the target of the search (the EndNote library or online database) is not saved.

To save a search:

1. Configure the Search tab as you would like.
2. Click the *Options* button and select *Save Search*.
3. A dialog appears, prompting you to name the search strategy. Enter or edit the name and click *Save.* The search files are saved by default in the EndNote\Searches folder in the Windows Application Data folder . You may save them elsewhere if you prefer, but EndNote will open to this Searches folder when you choose to Load a saved search. EndNote adds ". ENQ" as the file name extension for saved searches.

To load a saved search:

1. On the Search tab, click the click the *Options* button and select *Load Search* .
2. In the dialog that appears, select the search strategy that you would like to use, and click *Open.*
3. The contents and settings of the Search window change to reflect the saved search. Click *Search* to initiate the search.

When you save a search strategy, it is easy to run a complicated search again, which you may want to do as you add references to the library.

You can save the search results (the set of matching references) as a group. You can use the saved search strategy to set up a Smart group. Smart groups are updated as you add references to your library. Or, you can save the specific results to a Custom group, but the group will not be updated as you add references to your library; you would need to run the search again to find references entered since the last search.

Finding Duplicate References

Finding Duplicate References

In order to help locate duplicate references, EndNote offers a *Find Duplicates* command. This command searches the references that are currently showing in the Library window to identify duplicates. Duplicates are determined based on the duplicate criteria specified in preferences—see Duplicates Preferences.

To find all of the duplicate references in a library:

1. With the Library window open, click on the All References group to show all references.
2. From the References menu, choose *Find Duplicates*.

   EndNote will display a Find Duplicates dialog, where you can compare duplicates and decide which version to keep and which to delete.
3. For each set of duplicates, you have the option to:

   Click *Keep This Record* to save that particular reference and throw the other one in the Trash.

   Click *Skip* to leave both references in the library, intact. They will appear in a temporary Duplicate References group, so you can review them later.

   Click *Cancel* to stop the Duplicate References operation. All duplicates will appear in a temporary Duplicate References group if you wish to review them.

The older (first entered) reference will always appear in the left column.

Warning: Before selecting *Keep This Record*, which will delete the duplicate, check the record numbers to be sure that you are not deleting a reference already cited in a paper.

By default, references are considered duplicates if they have the same reference type (such as Journal Article or Book), and the Author, Year, and Title fields are identical. The criteria for detecting duplicates can be changed using the Duplicates settings in EndNote's Preferences dialog.

References which *seem* identical may not show up as duplicates if the information in the fields EndNote checks is slightly different or if the reference types are different. When trying to determine how references differ, it is helpful to know exactly how EndNote compares them.

Author: Compares last name and first initials (even if the first or middle name are written in full). Capitalization is not important.

Year: Compared exactly as entered.

Title: Leading articles "A," "An," or "The" are ignored, but punctuation is included. Capitalization is not important.

Reference Type: Compared exactly as entered.

When there are no more sets of duplicates to compare, the Find Duplicates dialog closes. The Duplicate References group is refreshed, the Trash group contains the unwanted duplicate references, and all other groups are updated appropriately. The Duplicate References group is empty unless at least one set of duplicates was skipped or the Duplicate References operation was cancelled.

Finding Text in a Single Reference

Finding Text in a Single Reference

When you have a reference that contains a significant amount of text, such as long abstracts or notes, it can get hard to find things!

To jump to specific text within a reference with the Go To command:

1. Open a reference. The *Go To* command works on the currently open reference. If more than one reference is open, it works on the topmost reference.
2. From the References menu, select *Go To*.

   You could also right-click to select *Go To* from the context-sensitive menu, or use the keyboard command noted on the References menu.
3. Type the text you want to locate and click next (or press Enter).

   The number of characters you can enter in the *Go To* dialog depends on the size of the symbols . When pasting text in the dialog, be aware of this limitation. The *Go To* dialog also includes a drop-down list of recently searched terms.

EndNote will jump to the text and highlight it within the reference. You can use *Go To* again to find the next occurrence, or click *Cancel* to dismiss the Go To dialog.

Sorting the Library

Sorting the Library

The *Sort Library* command provides a way to arrange all references showing in the Library window for browsing, exporting, printing, or copying.

EndNote libraries are typically sorted by the first author's last name and first initial, year, and record number. When you add a new reference, or modify an existing reference, EndNote automatically files it in this order. Use the *Sort Library* command to change this order. The current sort order remains in effect until you change it again.

To change the sort order:

1. Click in the reference list.
2. From the Tools menu, choose *Sort Library*.
3. Select one or more field names from the lists in the dialog. Enter the field names in the order you want the references sorted. (You do not have to use all five options.)
4. Click the button to the right of each field to indicate ascending or descending order.
5. With the field names entered as desired, click *OK*.

The Sort Options dialog is initially set to sort the library by author names, in alphabetical order, and then references published by the same author are sorted by year (from oldest to newest).

Note: EndNote reads the default language (or locale) setting from your operating system and uses it as the default language for character sorting. However, you can override the default language setting on this dialog. The Korean sort option was added to EndNote X2, and will be ignored by earlier versions of EndNote.

Special Cases in Sorting

Except for title fields, quotation marks, parentheses and other punctuation marks are considered during a sort. In an alphabetic sort, punctuation comes first, then numbers, then letters A-Z.

If the field you selected to sort by is empty in a particular reference, or not included in the selected reference type, that reference will sort before the other references in ascending order.

Author Names

When you select the Author field for sorting, author names from the first Author field are sorted by last name first, then first initial. Next, author names from the Secondary Author field are compared for sorting. Then, author names from the Tertiary Author field are compared for sorting.

If a reference has more than one author in a single field, EndNote includes the additional authors in the sort (up to 255 characters) before moving on to other fields.

If you select the specific First Author field to sort, only the surname is used for sorting.

If your EndNote library includes author names with connectives such as de, di, van, and von, you may want EndNote to skip these parts of the name in order to sort the references by the principal element of the surname. See Sorting Preferences.

Titles

When sorting by title fields, EndNote ignores the words *A*, *An*, and *The* as well as punctuation at the start of the titles. You may enter additional words that should be ignored for sorting purposes when they appear at the beginning of a title. To do so, see Sorting Preferences.

Sorting Diacritical Characters

Characters with diacritics are sorted differently in English, Spanish, Swedish, and other languages. EndNote reads the default language (or locale) setting from your operating system and uses it as the default language for sorting. EndNote typically sorts diacritical characters according to the rules of the language selected for your operating system; however, you can override the default language setting on the Sort Options dialog.

Using Groups

About Groups and Group Sets

About Groups and Group Sets

Groups make it easy to break a large library into subsets for later viewing. A group simply points to a subset of references that already exist in the library.

You can further organize your references by storing multiple groups in custom Group Sets.

The Types of Groups in EndNote

There are several types of groups that make it easy to organize your references in EndNote. The first section of groups are automatically generated, and include both permanent groups and temporary groups.

Permanent Groups include All References, Unfiled, and Trash. These are groups that you cannot remove or rename. All References displays every reference in the library. Unfiled displays those references that are not part of a custom group (and, optionally, smart groups). Trash is a holding place for references you have removed from the library but have not yet permanently discarded by emptying the Trash.

Temporary Groups include Copied References, Duplicate References, Imported References, Search Results, and several Full Text groups. These temporary groups may be replaced as you use commands in EndNote, and are always deleted when you close a library. (Only the groups are deleted; the references remain in the library.)

Custom Groups are manually created by the user to help organize the library; you can drag-and-drop to copy individual references into a custom group. Custom Groups are listed alphabetically (click the My Library header to toggle between ascending and descending order).

Smart Groups use search criteria to dynamically update groups as existing references are edited or new references are added to the library.

Combination: Use combination groups to better organize your EndNote references. Combine groups and use AND, OR, and NOT to create new, useful *smart* group sets. Save references in groups and then save sets of groups in group sets. You can collect both custom groups and smart groups within the same combination group set.

Online Search groups allow you to easily initiate a search of a favorite online database and quickly view the latest download.

EndNote Web groups allow you to easily initiate a transfer of references between an EndNote Web folder and your EndNote desktop library.

Find Full Text groups are temporary, and appear only when you use the Find Full Text command.

When you click on a group name, the name is highlighted and the reference list is updated to reflect the references found in that group.

The Types of Group Sets in EndNote

Groups sets are indicated by group set headings in the Groups pane. Each set may list a number of groups. Some group sets are permanent, and cannot be removed:

Online Search
For information about online searching, see How to Search an Online Database.

EndNote Web
For information about EndNote Web, see Overview of EndNote Web.

Find Full Text
For information about Find Full Text, see Finding Full Text for a Reference.

You can also create any number of custom group sets. Custom group sets can contain any combination of custom groups and smart groups. See Using Group Sets

Expand or collapse the list under a group set heading by clicking the triangle plus (+) or minus (-) icon. When a set is collapsed, the number next to the group set heading reflects the total number of references found in all groups in the set.

Please also see Displaying or Hiding Groups and Important Points about Groups.

Displaying or Hiding Groups

Display Modes

In the Library window, you can work in **Integrated Library & Online Search Mode** or switch between **Local Library Mode** and **Online Search Mode**. To select a display mode, click on the appropriate toolbar button.

The default display is Integrated Library & Online Search Mode, where all groups and commands are available. When you download references from an online database, they are saved directly into your open library. You may want to always work in Integrated Library & Online Search Mode.

The other option is to switch between Local Library Mode and Online Search Mode. In Local Library Mode, all library commands are available, but Online Search groups are not available; once you select the *Online Search* command from the Tools menu, you are automatically switched to Online Search Mode.

In Online Search Mode, only the Online Search groups are available, and references are downloaded into a temporary library. This allows you to download references from online databases without affecting your local library; once you determine which references you want to keep, you can copy them to a permanent EndNote library. Many library commands are not available in Online Search Mode. See How to Search an Online Database for step-by-step information about searching online databases.

For more information about the display modes, see The Library Window Display Modes.

The Groups Pane

The left pane of the Library window lists the groups in the current library, along with a record count for each group. A new library may have very few groups. The All References, Unfiled, and Trash groups are permanent, and cannot be removed.

Click a minus sign (-) next to a group set heading to hide the list of groups under that heading. Click a plus sign (+) next to a group set heading to display the list of groups in that group set.

You can drag the separator bar between the group name list and the reference list to adjust the size of the panes.

You may not always want to display groups, as that pane takes up screen space. From the Groups menu, choose *Hide Groups* or *Show Groups*.

Important Points about Groups

Keep these points in mind as you work with groups:

- You can create a maximum of 500 Custom Groups and Smart Groups (combined) in a single library.

You can create a maximum of 500 group sets in a single library.

You can add a reference to a particular group only once (based on the unique record number). A single reference will never appear more than once in a particular group. However, you can add that reference to any number of groups.

When you are viewing a group of references with selected (highlighted) references, and then switch to viewing All References, the same set of references are selected in the All References view until you deselect them.

You can drag references from one library directly into a group in another open library. The references are copied to the second library and into the target group.

Removing a reference from a *custom group* does not delete it from the *library*. It removes the reference from the group subset, but the reference still exists in the library.

Deleting a reference from a *library* also deletes it from all *groups* in that library. The reference no longer exists. Highlight the reference, go to the All References view, and then choose *Move References to Trash* from the *References* menu.

When you delete a reference from a smart group, EndNote also deletes the record from the All References group, with no warning.

Once you move a reference to the Trash group, it is no longer officially in your library (it will not appear in any other group or reference list, it is not included in your reference count, and it cannot be searched or cited). However, until you choose *Empty Trash*, you can still drag the reference from the Trash group back to your active library.

Group Sets

Using Custom Group Sets

Before long, you could have a large number of groups in your library. To help organize your groups, you can create up to 500 custom Group Sets. Custom group sets can contain any combination of custom groups and smart groups.

Use the plus (+) or minus (-) signs next to a group set header to expand or collapse the list of groups found in that group set. When the list is collapsed, the number next to the group set header reflects the total number of references found in each group. This number could include duplicates (references that are included in more than one group).

Some group sets are automatic and cannot be removed or renamed. These include the sets Online Search, EndNote Web, and Find Full Text.

To get started with groups sets, see:

About Groups and Groups Sets

Creating a Group Set

Changing the Position of a Group Set

Renaming a Group Set

Deleting a Group Set

The Lost & Found Group Set

The Lost & Found group set has special properties. Chances are that you will never see this group set! It appears only in very specific situations. This is one example:

> You open your library with EndNote X4, create a custom group set, and create a group of references within that set. You then move the library to another location, and open it with an older version of EndNote. The earlier version of EndNote did not include the custom group set feature, and so it ignores your group set information. You save changes to the library. You move the library back to the original machine and open it again with EndNote X4. EndNote remembers that you have a saved group, but it does not know under which group set it should be located, so it places the group in a Lost & Found set.

The Lost & Found group set is a temporary holding place. You cannot add to any groups to this set, or rename them, or search them. The only thing you can do is drag a group from this set to another group set. Once you do that, all functionality returns to the group. Once you have moved all groups from the Lost & Found set, the Lost & Found set is removed.

Creating a Group Set

A new library begins with a single custom group set titled My Groups. However, you can create up to 500 custom group sets in your EndNote library.

To create a group set:

1. From the Groups menu, choose *Create Group Set*.
2. Enter a name for the new group set.

When you first create a group set, there are no groups listed below the heading. You can drag groups to move them from other group sets to the new group set, or you can create new custom groups and/or smart groups under the new heading.

Changing the Position of a Group Set

To change the position of a group set:

Click on the group set heading, hold down the mouse button, and drag and drop the group heading to its new position in the Groups pane. The new position will be remembered each time you start EndNote.

You can change the position of any group set, including Online Search, EndNote Web, and Find Full Text.

Renaming a Group Set

To rename a group set:

1. Click on a group set heading to select it.
2. From the Groups menu, choose *Rename Group Set*.
   Or, right click on the group name and select *Rename Group Set*.
3. Enter a new name for the group set.

Renaming does not affect the groups found in the set. Your groups will remain intact.

You cannot rename the permanent group sets: Online Search, EndNote Web, and Find Full Text.

Deleting a Group Set

Are you sure you want to delete that group set? When you delete a group set, all of the groups within that set are also deleted! The references are not deleted; they still reside in your library.

To delete a group set:

1. Click on a group set heading to select it.
2. From the Groups menu, choose *Delete Group Set*.

You cannot delete any of the permanent group sets: Online Search, EndNote Web, and Find Full Text.

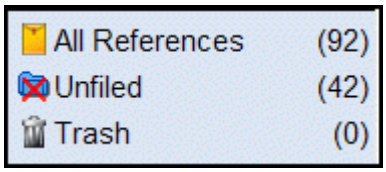
You also cannot delete the last custom group set left in a library. Each library must have at least one custom group set as a place to store new custom groups or smart groups.

Automatic Groups

Permanent Groups

Permanent groups are maintained by EndNote, and cannot be renamed or deleted.

The permanent groups are:



All References: This displays all of the references in the current library. If you highlight a subset of references in this group and then display only those selected references, the name of the group changes to Showing References. The status line along the bottom of the window will always tell you how may references you are viewing plus the total number of references in the library.

Unfiled: This group contains those references that are not part of a custom group (and optionally not part of a smart group). Right click on Unfiled to display a context sensitive menu and toggle the setting *Exclude Smart Groups in Unfiled/Include Smart Groups in Unfiled*.

Trash: This group contains the references you have removed from the library by highlighting references and selecting *Move References to Trash* from the *References* menu. While the references are officially no longer in your library (they will not appear in any other group or reference list, they are not included in your reference count, and they cannot be searched or cited), they are not completely deleted until you go to the Groups menu and choose *Empty Trash*. Until you choose *Empty Trash*, you can still drag references from the Trash group back to your active library.

Temporary Groups

There are several groups that are created automatically and are temporary; they exist only while a library is open. All of these groups may be available at the same time. Closing EndNote or just the library will delete a temporary group, but the references themselves are not deleted from the library.

The temporary groups are:

Copied References: This temporary group displays the last group of references that were retrieved in Online Search Mode and then copied into your permanent library with the *References>Copy References to* command or the *Copy to Local Library* icon on the toolbar. See How to Search an Online Database.

Duplicate References: This group shows the results of duplicate detection in your library. You can run duplicate detection with the *References>Detect Duplicates* command. See Finding Duplicate References.

Imported References: This group shows the last group of references imported into the library with the *File>Import* command. Each time you import additional references into the library, this group is replaced with the new set of references. See General Importing Instructions.

Search Results: This group shows the results of the last search performed on the current EndNote library. Each time you execute another search on the library, this group is updated with the new search results. See Simple Searches.

Find Full Text groups: When you use the *References>Find Full Text* command to find the full text of a reference, a Find Full Text group set appears, with several temporary groups in it—Searching, Found PDF, Found URL, and Not Found. See Finding Full Text.

Because temporary groups are deleted when you close the library, you may occasionally want to save one of them to a custom group so it is available during a later session.

To save a temporary group as a custom group:

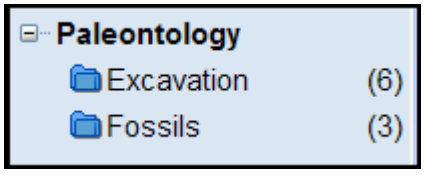
1. Click on the group name to display the list of references in the group.
2. To select all references in the list, first click in the list, and then go to the *Edit* menu and choose *Select All*.
3. From the *Group* menu, select *Add References To>Create Group*.
4. Name and save the new group.

Note: You are saving a specific set of references. If you add more references to your library, the search results you saved to a custom group are not updated. You would need to re-run the search to find the new references.

Custom Groups

Custom Groups

Custom groups are perfect for when you want to build a group of references that are not easily found by index term or other common text. You can browse through your reference list and drag individual references to a custom group.



Create group sets in order to organize your custom groups and smart groups. See Group Sets.

Custom groups and smart groups are listed alphabetically within each group set. Click the My Library header at the top of the Groups pane to toggle between ascending and descending order.

To get started with custom groups, see:

Creating a Custom Group

Adding References to a Custom Group

Removing References from a Custom Group

Creating a Custom Group

You have two options for creating a custom group. You can select references and then add them to a new group, or you can create an empty group and then add references to it.

To create a custom group:

1. Highlight the name of the group set to contain the new group.
2. Use one of these options:
    - From the Groups menu, choose *Create Group*.
    - Right click on the group set name to display a contextual menu and select *Create Group*.
    - Select references in a reference list, then go to the Groups menu and choose *Add References To>Create Group*.
3. Enter a group name that is anywhere from 1 to 255 characters in length. There are no restrictions on the characters you can use in a group name. It is possible to give two different groups the same name.
4. Your next step is to add references to the new group. See Adding References to a Custom Group.

You are limited to 500 custom and smart groups per library. Once you reach that limit, you must delete a group before you can add a new one.

If you do not have a group set selected when you create a new group, the new group will be added to the nearest custom group set.

Adding References to a Custom Group

You can add references to a new or existing custom group at any time. You do not have to worry about copying the same reference to a group more than once; EndNote will not allow duplicates (based on unique EndNote record numbers).

To add references to a group:

1. First, select the references you want to add to the group. You can do this in many ways, for example:
    - Click on an individual reference to select it.
    - Display a list of references (such as search results), click in the list of references, and then go to the *Edit* menu and choose *Select All.*
    - Hold down the Shift key and click on two references to select a range of contiguous references.
    - Hold down the Ctrl key and click on individual references to select them.

2. Add the references to a group. You have several methods available:

    - Drag and drop the selected references onto an existing custom group name in the left pane of the Library window.
    - From the Groups menu, select *Add References To* and then select either the name of an existing custom group or *Create Group*.
    - Right click on the reference list to display a contextual menu, select *Add References To*, and then select either the name of an existing custom group or *Create Group*.

Removing References from a Custom Group

You can remove references from any of your custom groups or online search groups. The references will still be in your library and appear under All References, they just will not appear in that particular custom group.

To remove references from a custom group:

1. In the left Groups pane of the library window, click on the name of the group.
2. In the reference list, select the reference(s) you want to remove. You can select multiple references:

    Hold down the Shift key and click on two references to select a range of contiguous references.

    Hold down the Ctrl key and click on individual references to select them.
3. Select the *Remove References from Group* command in one of these ways:

    Press the *Delete* key on your keyboard.

    From the References menu, select *Remove References from Group*.

Remember that the selected references are only removed from this group; they still exist in the library, and possibly in other groups.

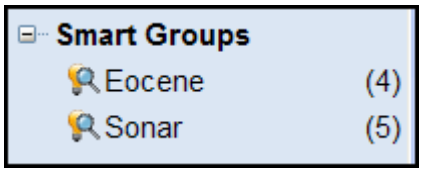
If you really want to delete the references from your library, see Deleting References from a Group.

Note: When you delete a record from a smart group, EndNote also deletes the record from the All References group, with no warning.

Smart Groups

Smart Groups

Smart groups are built with search strategies. Smart groups are dynamically updated as you add references to and edit references in the library.



You can create group sets in order to further organize your smart groups and custom groups. See Using Custom Group Sets.

To start working with smart groups, see:

Creating a Smart Group

Creating a Smart Group from an Existing Search Strategy

Editing a Smart Group

Creating a Smart Group

Smart groups are built with search strategies and are dynamically updated as you add references to and edit references in the library.

Note: You cannot create a smart group when an Online Search group is displayed, whether you are showing Integrated Mode or Online Search Mode.

To create a smart group:

1. Display the set of references that you would like to search. This would typically be All References.
2. From the Groups menu, select *Create Smart Group*. A search dialog appears.
3. Enter a name for the group, then your search strategy, and then click *Create*.

The Smart Group search dialog works the same as the regular Search tab. If you need more information about how to use the Search dialog, see Searching for References.

The new smart group will be added to the next group set after the one being searched. If you are searching all references, it will be in the top-most custom group set. You can drag-and-drop the new smart group to any custom group set.

Creating a Smart Group from an Existing Search Strategy

You may have already created and saved a search strategy to find a subset of references. Rather than run the search again each time you enter and edit references, you can use the saved search strategy to create a smart group.

To create a smart group from a search strategy:

1. Click on All References to display all references in the library.
2. In the Tabs pane, click the Search tab.
3. Click *Options* and select *Load Search*.
4. Locate, select, and open the search strategy to load it into the Search tab.
5. Click *Options* and select *Convert to Smart Group*.

A Converted Search group is created and stored as the first group in the next custom group set. If you searched all references, the Converted Search group will appear as the first group under the first custom group set. If you searched a group subset, the Converted Search group will appear as the first item under the next group set. You can drag-and-drop the smart group to any custom group set.

The smart group will be updated with matching references each time you save a reference.

You can rename the new group. See Renaming a Group.

Editing a Smart Group

You may have created a smart group only to find that you need to tweak the search strategy for the group.

To edit a smart group:

1. Highlight the smart group name in the Groups pane.
2. From the *Groups* menu, select *Edit Group* to display the smart group search dialog. The current search strategy is displayed.
3. Modify the search strategy as needed, and click *Save*.

If you need more information about how to use the Search dialog, see Searching for References.

The smart group updates based on the new search strategy.

Managing Groups

Managing Groups

See these topics about managing groups:

Searching a Group

Renaming a Group

Deleting References from a Group

Deleting a Group

Creating a Combination Group

Combine custom and smart groups under a single group to better organize your EndNote references. Use AND, OR, and NOT logic to create new, useful combined group sets. Save references in custom and smart groups, and 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 your search criteria.
4. Use AND, OR, NOT to include or exclude custom and/or smart groups in your combined group set.
5. You can also use the Add (+) and Remove (-) buttons to manage which groups you want to include in and/or remove from your combined group set

You are limited to 500 custom and smart groups per library. Once you reach that limit, you must delete a group before you can add a new one.

Note: You cannot include group sets in a combination group set.

To edit a combination group set:

1. Select the group that you want to edit.
2. From the Groups menu, choose *Edit Group* to display the Create from Groups dialog.
3. Enter a new name for the group (optional).
4. Use AND, OR, NOT to include or exclude custom and/or smart groups in your combined group set (optional).

You can also use the Add (+) and Remove (-) buttons to manage which groups you want to include in and/or remove from your combined group set.

To delete a combination group set:

1. Select the group that you want to delete.
2. From the Groups menu, choose *Delete Group* to display a dialog.
3. Click Delete to remove the combined group set from the Group pane.

Searching a Group

You can limit your searching to a specific group of references.

To search a group:

1. Click on the group name to display the references in the Library window.
2. From the Tools menu, select *Search Library* (or click on the Search tab) to display the Search tab.
3. Make sure the search set list is set to “Search Whole Group.”
4. Enter your search strategy and click *Search*.

For more information about searching, see Searching for References.

Renaming a Group

There are several ways to rename a custom group or a smart group, so you can choose the one that is the most convenient for you.

To rename a group:

1. In the left pane of the library window, click on the name of the group.
2. Select the *Rename Group* command in one of these ways:

- Click on the group name a second time to directly edit the name.
- From the Groups menu, select *Rename Group*.
- Right click with your mouse on the group name to display a contextual menu, and select *Rename Group*.

You cannot rename the automatically created groups: All References, Duplicate References, Imported References, Search Results, Unfiled, Trash and the Find Full Text groups.

Deleting References from a Group

When you delete a reference from a group, it is moved to the Trash and is deleted from all groups in your library.

If what you really want to do is just remove the reference from a custom group, without deleting the reference from your library, see Removing References from a Custom Group.

To delete a reference from your library:

1. Highlight the reference (or multiple references) in the Reference List pane of the Library window.
2. Move References to Trash.

   At this point, the references are moved to the Trash group. The Trash group is a temporary holding place. The references are no longer in your library, and cannot be cited or searched, but they have not been irrevocably thrown away yet, either. If you change your mind, you can still drag a reference from the Trash back to the All References group to bring it back into the library.
3. When you are absolutely certain that you no longer want the reference(s) you have moved to Trash, select the Trash group and then go to the *References* menu and choose *Empty Trash*.

Note: If you do not *Empty Trash*, EndNote will prompt you when you close the library.

4. Display All References to continue working in your library.

Note: When you delete a record from a smart group, EndNote also deletes the record from the All References group, with no warning.

Deleting a Group

When you delete a group, references are removed from the group but are not deleted; the references themselves are still part of the library.

Temporary groups are always removed when you close the library.

When you delete an Online Search group, it does not mean that you can no longer search that online database. You have not deleted the connection file from disk, you have simply removed it as a favorite. You can go to *Tools>Online Search* and select that connection file again.

You can delete an EndNote Web group, but when you connect to EndNote Web again, you can recreate the group.

To delete a group:

1. In the left pane of the library window, click on the name of the group you want to delete.
2. Select the Delete Group command in one of these ways:

- From the Groups menu, select *Delete Group*.
- Right click with your mouse on the group name to display a contextual menu, and select *Delete*.

The group is deleted from the library, but the references that were in the group are still part of the library.

Term Lists

Introduction to Term Lists

EndNote's term lists are used to store terms such as keywords, author names, or journal names. You can use these stored terms when entering references to improve consistency and accuracy of information in your library. You can also use the Journals term list to store abbreviated journal names that EndNote can substitute for the full journal name in a bibliography.

To get a general sense of how the term lists work, here's a brief overview of how term lists can be built and used for someone with a new EndNote library. With the default term list settings in the preferences, all of the updating of terms, and auto-completion, happens automatically. If you do not like this behavior, you may turn off these settings (see Term List Preferences).

Term Lists are Automatically Maintained

When you create a new EndNote library, there are three empty term lists already set up and ready for you to use: Authors, Journals, and Keywords. As you enter new references into your library (whether by typing, importing, or pasting them) EndNote updates the term lists automatically so that the Authors, Journals, and Keywords lists include all of the author names, journal names, and keywords entered into your references.

Term Lists Help With Data Entry

When you use the *New Reference* command in the References menu to create new references, you will notice two other features associated with the term lists. As you begin entering an author name, EndNote attempts to complete the name for you by suggesting the closest matching name in the Authors term list. If you enter a new name that is not already in your Author list, the name appears in red text to indicate that it is a new addition to the term list. When you close or save the reference, that new term is added to the list.

When you are searching for references, you can also open a term list to pick the exact term or name for which to search.

Important Points About Term Lists

The following list includes useful information about term lists.

- Term lists are stored with the library and therefore are specific to only that library.
- A library must be open before you can edit its term lists.
- If you enter a lot of references manually, you may find it helpful to create new term lists for things like publisher and city names. Up to 31 term lists can be created for any library.
- There is no limit to the number of terms in a term list.
- One term can be up to 253 characters long.
- Terms can be copied from one list and pasted into another.
- Entire term lists can be exported and imported.
- By default, term lists are automatically updated from the terms entered in your references. New terms appear in red text in the Reference window. This functionality may be turned off using EndNote's Preferences.
- Term lists can be "linked" to specific fields so that EndNote associates the correct term list with the field you are editing.
- Terms lists can be used with the "Auto-entry" feature on or off. By default, this option is turned on so that EndNote will suggest the closest matching term as you type in a reference.

The Journals term list stores various forms of journal names that can be used when creating bibliographies. EndNote provides several Journals lists (including Humanities, Medical, and Chemistry) that can be imported for use with your EndNote libraries. Look in the EndNote X4 > Terms folder.

Adding Terms to a Term List

Automatic Updating of Term Lists

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 you enter a term into a reference, and that term is not in the associated term list already, the term appears in red text to alert you that you have entered a new term. This can help you to maintain a controlled vocabulary for keywords and other terms.

You can turn off automatic updating of term lists if you do not want to use the term lists at all. You can also turn this option off and manually enter terms into your lists as described in the following sections. For example, you can manually enter all of the terms you plan to use into a term list before entering references into the library. This can be extremely helpful when you have someone else entering data for you and you want a specific vocabulary used for keywords or other terms. As references are entered into the EndNote library, the term lists can speed data entry, and if a red term appears, the person doing data entry knows that they have entered something that was not intended to be a valid term for that field.

Turning Off the Automatic Updating of Term Lists:

1. From the *Edit* menu, choose *Preferences.*
2. Select the *Term Lists* panel.
3. Click the check boxes for "Update lists when importing or pasting references" and "Update lists during data entry" to remove the check mark. The feature will be turned off.

Delimiters

EndNote has predefined term lists for authors, keywords, and journals. When you enter multiple terms into those fields and EndNote updates the term list, it needs to know when one term ends and the next term begins. We call the punctuation that separates the terms "delimiters."

For the Author fields, author names must always be entered one name per line. Carriage returns (end of line marks) are the only valid delimiter for this field. Journals normally have just one journal name per reference in this field, so delimiters are not important here. Keywords are the most complex of the three. By default, EndNote uses carriage returns (end of line marks), semicolons, and backslashes (\) as delimiters for the Keywords field. If you would like to use other delimiters, see Delimiters used for Separating Terms.

Using the "New Term" Command

To manually add a term to a term list:

1. From the *Tools* menu, choose *Open Term Lists* and select the term list that you want to modify.
2. On the *Terms* tab, click *New Term*.
3. Enter the term and click *OK* to add it to the list and dismiss the "New Term" dialog.

Continue this way until you have added the last term, then click *OK* to dismiss the dialog.

If you are entering terms into the Journals term list, you will have options to enter different forms of the journal name. See Important Points About Entering Journal Names for more information about using the Journal lists.

Note: The *Save Term* (or *Save Journal*) button is unavailable (dim) if the new term already exists in the term list.

Copying Terms Between Lists

You can copy terms from one list and paste them into another as a way to quickly transfer terms between lists. This is particularly useful because term lists are specific to an individual library.

To copy terms between lists:

1. From the *Tools* menu, choose *Open Term Lists* and select the list with terms you want to copy.
2. Select the term(s) to copy. (Hold down the Ctrl key to select multiple terms; use the Shift key to select a range of terms.)
3. Right click and select *Copy* to copy the highlighted term(s).
4. Open another list.
5. Click in the list , and then right click and select *Paste* to paste in the term(s).

Copying Terms From Other Sources

You can copy terms from any text, and paste them into a term list.

For example, to copy a word from a paper you are writing and paste that word into a term list, first select the term in your word processor and copy it. Then switch to EndNote and open the desired term list. Click in the list , and then right click and select *Paste* to paste in the term(s).

Manually Updating Term Lists

To create a term list automatically from words already in your library, use the *Update List* button on the *Terms List* dialog. This is useful if you have turned off the preference to automatically update your term lists, or if you have received a library from a colleague without a term list, or if you have deleted a term list and wish to recreate it.

The *Update List* command can apply to just the selected references or all references showing in the Library window. Use the *Search* command to show only those references from which you want to update the list. Or select references in the Library window and update the term list from just those references. Choose *Show All References* from the References menu before using the *Update List* command to be sure that you are updating the list from all of the references in your library.

Important points about the *Update List* command:

> *Update List* does not change the terms in your references; it only adds new terms from your references into the term list.
>
> *Update List* does not add duplicate terms to a list.
>
> *Update List* removes leading and trailing spaces, but does not change punctuation.
>
> *Update List* does not automatically link fields to a term list. For easy data entry, you can link a single term list to any number of fields. See Linking Term Lists to Fields.

To update a term list:

If you are updating the Journals list, see Updating a Journal List.

1. Determine which references should be scanned for terms and make sure they are either "showing" or selected in the Library window.
2. From the *Tools* menu, choose *Define Term Lists* and select the term list that you would like to update.
3. Click *Update List*.
4. The currently linked fields are listed in the dialog as the fields from which EndNote gathers new terms. If necessary, remove a field from this list by selecting it and clicking *Remove Field*; or add a new field by selecting it from the *Add Field* list. Adding or removing field names from this list does not affect the links between fields and term lists.

The Generic field names are used in this dialog. See List of Reference Types to find the corresponding field names for the fields of various reference types.

5. To update a term list from only the currently selected references in your library, check the "Update Terms From Selected References" option.
6. Click OK to begin the updating process. When finished, EndNote displays the number of terms added to the list. Click *OK* and the process is complete.

Note: Typing Esc stops the update process, but all terms added up to that point are kept in the term list.

Delimiters used for Separating Terms

The text that is used to separate the terms in a particular field is determined by the "Delimiter" settings on the *Lists* tab of the Term Lists dialog (choose *Define Term Lists* from the *Tools* menu).

If your keywords are separated by a slash, such as:

Antarctica/ozone/stratosphere

you should type a slash (/) as the field's term delimiter. A carriage return is always interpreted as a delimiter, so it is not necessary to enter a delimiter for the Author fields, or any other field that has terms entered one-per-line. If different delimiters are used for the same field in your references, you will need to do more than one update process, updating from the references with different delimiters separately.

Cleaning Up After Updating

Click on the Terms tab, and scroll through the term list to make sure that the *Update List* command had the desired result. If it did not, you can highlight specific terms and remove them by clicking *Delete Term*.

After using the *Update List* command, you might find that due to errors or variations in spelling, you have multiple entries for the same term. Scan through the list and delete the unwanted terms.

If necessary, use the *Change Text* command to change all occurrences of a term in your library. For example, if both "geochronology" and " geo-chronology" are entered as keywords, you can delete the unwanted term "geochronology" from the term list, then click on the Library window, and choose *Change Text* (Ctrl +R) from the Edit menu to change "geochronology" to " geo-chronology" throughout the library.

Importing Terms Into Term Lists

EndNote provides several lists of journal names and abbreviations, including lists for Chemistry, Medicine (Index Medicus), and the Humanities, all of which are stored in the Terms folder in the EndNote folder. If you are interested in using these abbreviated forms of the journal names in your bibliographies, you can import them into your term lists and adjust your styles to use the abbreviations (see Loading Supplied Journal Abbreviations and Creating Bibliographies with Journal Abbreviations).

If you would like to look at the lists before importing them, you may open them in your word processor—but do not edit or save them. They must remain tab-delimited text files in order for EndNote to correctly import the terms.

Terms can be imported from any text file that lists the terms one per line. Make sure a carriage return is also inserted after the last term in the list. If you create a list of terms in a word processing document, be sure to save the list as plain text using the *Save As* command in your word processor. Then, if your terms include extended characters, select the Unicode (UTF-8) encoding option.

To import a text file that contains terms:

1. From the *Tools* menu, choose *Define Term Lists* and highlight the term list to which you want to add terms. (Use *Create List* if you want to create a new list.)

Note: EndNote provides several journal lists in the Terms folder of the EndNote folder. You may want to import one of these lists to add journal names to your Journals term list. See Loading Supplied Journal Abbreviations for more information.

2. Click *Import List*.

3. Select the text file to be imported and click OK . EndNote's Medical, Chemical, and Humanities lists are in the Terms folder in the EndNote folder.

The new terms are imported and sorted alphabetically into the existing term list. This import must be done for each library that you want to use these terms.

Using Term Lists for Data Entry and Searching

Inserting Terms into References

Suggesting Terms As You Type (Auto-completion)

If you are entering text into a field that is linked to a term list, EndNote finds the first matching term in the list and suggests that as the term you want to enter.

The suggested text appears highlighted after the cursor. Continue typing until EndNote suggests the correct term, and then press Enter or Tab to accept it. (Enter creates another line in the field so that you can enter more author names, for example; Tab moves the cursor to the next field in the reference.)

When EndNote suggests a term, you can use the Up or Down arrows on your keyboard to have the suggested text change to the previous or next possible matching term in the term list.

When you enter a term that is not already in the term list, it appears in red to indicate that it is a new term. When you close or save the reference, that term is added to the term list and will no longer display in red.

These term list features may be turned off. To turn off the display of red text, turn off the preference to "Suggest Terms as You Type." See Term Lists Preferences.

Inserting Terms Without Using the "Suggestion" Feature

If you have turned off the option to suggest terms as you type, you can still insert terms into your references manually.

To insert a term from a Term List window:

1. Open a reference and position the insertion point where you want to add the term.
2. From the Tools menu, choose *Open Term Lists* and select the desired list.

   Or, in an Author, Journal, or Keywords field, press Ctrl +1 to display the appropriate list.
3. Double-click a term to insert it directly into the reference.

Terms can also be selected by typing the first few letters of the term, by using the Arrow keys, or by clicking on the term with the mouse. Hold down the Ctrl key to select multiple terms. Press Enter to insert the selected term or click *Insert Term*. If multiple terms are selected and inserted, they are listed in the reference one per line in alphabetical order.

Selected terms can also be copied from the term list using the *Copy* (Ctrl + C) command in the Edit menu, and pasted into a reference using the *Paste* (Ctrl +V) command in the Edit menu.

Note: The insertion point must be in a field in a Reference window or Search tab before you can insert a term.

Using Terms For Searches

To ensure that you are searching for the correct terms, you can use the term lists with EndNote's *Search* command. Terms can be entered into the Search tab just as they are entered into references. For example:

1. From the Tools menu, choose *Search Library* (Ctrl + F) and change the first search line to search the Keywords field.
2. From the Tools menu, choose *Open Term Lists* and select a list.

   Or, in an Author, Journal, or Keywords field, press Ctrl +1 to display the appropriate list.
3. Double-click a term to insert it into the Search tab.
4. Click *Search* to search for your references.

Editing Terms and Term Lists

Modifying Terms

Any term in a term list may be modified or deleted without affecting any of the references in the library or any links between term lists and fields.

To edit a term in a term list:

1. From the *Tools* menu, choose *Open Term Lists* and select the list that contains the term to be modified.
2. Select a term and click *Edit Term*. If multiple terms are selected, only the first one opens.
3. Change the term as necessary and click *OK* when finished. The modified term replaces the original term in the term list. (If the term already exists, the *OK* button is dim.)

Note: Editing a term in a term list does not change all occurrences of that term in your library. Use the *Change Text* command to find the old term in your references and replace it with the new one.

Deleting Terms

A term can be deleted by highlighting it in the list and clicking *Delete Term* or selecting *Clear* from the Edit menu. You can also use the *Cut* (Ctrl +X) command from the Edit menu to cut terms out of the list and *Paste* them elsewhere (such as into another term list). Deleting a term from a term list does not remove it from the references in the library.

Defining Term Lists

Defining Term Lists

Use the *Define Term Lists* command in the Tools menu to create, rename or delete a term list. This command is also used to specify the punctuation that separates individual terms in a reference (delimiters).

Deleting and Renaming Term Lists

Term lists can be renamed without disturbing their links to reference fields or the terms within them. Deleting or renaming term lists does not change the data entered into your references.

To delete or rename a term list:

1. From the *Tools* menu, choose *Define Term Lists* (at least one library must be open to access this command).
2. The drop-down menu at the top of the Lists tab lets you choose from a list of open libraries. Select the library for which you would like to modify the term lists.

To Rename a Term List: Highlight a term list and then click *Rename List*. In the Rename List dialog, enter the new name for the list, and click *OK*.

To Delete a Term List: Select a term list and then click *Delete List*.

3. Click *OK* to save your changes.

Configuring Term Separators (Delimiters)

EndNote uses the delimiters in the Define Lists dialog to determine what punctuation separates the individual terms in the same field in a reference.

For example, if you import data from a source that uses semicolons (;) to separate keywords:

> Adult, Age Factors; Astigmatism; Follow-Up Studies; Hospitals, University; Keratotomy, Radial; Myopia; Refraction, Ocular

you would want to be sure that the semicolon was selected as a separator for your Keywords term list. You would also want to be sure that the comma was not chosen because the commas in this example are used within some of the terms.

By default, EndNote uses the semicolon (;) and backslash (\), and end of line markers as separators. Words or phrases entered on different lines in a field (by pressing Return

Enter) are always interpreted as separate terms, but the other separators can be changed depending on your needs.

To customize the delimiters for a term list:

1. Open a library.
2. From the *Tools* menu, choose *Define Term Lists*.
3. Verify that your library name is selected at the top of the dialog, then click on the name of the term list that you intend to modify.
4. Click the check box to the left of the desired separator to choose it (or to unselect it if it is already checked).

The last check box provides a place to enter a custom term delimiter, if necessary.

Creating Term Lists

Predefined Term Lists

Three empty term lists are available by default with every library: Authors, Journals, and Keywords. These lists are already linked to their corresponding fields: the Authors term list is linked to the Author, Secondary, Tertiary, and Subsidiary Author fields; the Journals term list is linked to the Secondary and Alternate Title fields; and the Keywords term list is linked to the Keywords field.

Creating a New Term List

To create a new term list:

1. From the *Tools* menu, choose *Define Term Lists*.
2. Click *Create List*, and enter the name for the new list. You cannot create a term list with the same name as an existing term list.
3. Click *OK*.
4. Check the "Journal List" box *only* if you want to create a term list for storing journal names and abbreviations. These different forms of the journal name can be used interchangeably when creating

bibliographies. See Creating Bibliographies with Journal Abbreviations.

The predefined Journals term list is already set up as a multi- column list. If you delete this list, you can create another one as described here. Do not create a 4-column journal list for non-Journal fields.

At this point, you could import an existing list of terms, update the list from existing EndNote field data, or click on the Terms tab to manually enter terms into the list.

Note: New term lists must be linked to fields for the "Suggest terms as you type" and automatic updating features to work.

Linking Term Lists to Fields

Term lists are associated with fields using the *Link Term Lists* command from the *Tools* menu. When a term list is linked to a field, the list can be used to facilitate data entry. EndNote can also keep the term lists current by automatically adding new terms from linked fields. By linking term lists to particular fields, you can use the Auto-Suggestion feature whenever you are entering data into the linked field. Each field can be linked to only one term list. However, you can link the same term list to different fields.

The three predefined term lists (Authors, Journals, and Keywords) are already linked to their corresponding fields. Any new term list that you create is not linked to a field until you set up the links. The links between term lists and fields are specific to each library.

To change these settings or to link a new term list to one or more fields:

1. Open a library.
2. From the *Tools* menu, choose *Link Term Lists*.
3. Choose a library from the list at the top of the dialog.
4. The names of the available term lists appear next to the field names with which they are linked. You may change the links here as necessary by choosing a different term list from the pop-up lists.
5. Click *OK* to save your changes and close the dialog.

These changes will not alter any data that is currently entered in either your references or your term lists. Term lists may be linked to multiple fields.

Note: After linking a term list to one or more fields, you should make sure the list is updated with the data from those fields. Go to the *Tools* menu, select *Define Term Lists*, select the list, and click *Update List*.

To unlink a term list from a field:

1. With the library open, choose *Link Term Lists* from the *Tools* menu.
2. Scroll through the list of fields to find the field that you would like to be unlinked from a list. Choose *None* from the list next to the field name.
3. Save your changes by clicking *OK*.

Exporting and Printing Term Lists

Exporting and Printing Term Lists

Term lists can be exported and then imported into other term lists as a way to move complete lists from one library to another (see Importing Terms into Term Lists).

You can also open exported term lists in a word processor to print them.

To export a term list:

1. From the *Tools* menu, choose *Define Term Lists*.

2. Highlight the term list that you want to export.
3. Click *Export List*.
4. Name and save the text file that will be created during the export.
5. Click OK and the terms are exported to the text file and listed alphabetically, one term per line.

This file can now be imported into another EndNote term list or opened in a word processor to be printed. Term lists cannot be printed directly from EndNote.

Working with the Journals Term List

Important Points About Entering Journal Names

You do not have to use the abbreviation sections in a Journals term list, but if you do, keep these points in mind:

Enter variations of the same journal name together in one term.

Enter a consistent abbreviation format in each column. For example, all Index Medicus abbreviations could be entered under the Abbreviation 1, another format of abbreviated names in Abbreviation 2, and so on.

Only the first term for each journal (the one in the Full Journal slot) is transferred when you insert a term.

Use the *Journal Abbreviation* option in the styles to pick which form of the journal names should be used in the bibliography (see Creating Bibliographies with Journal Abbreviations).

EndNote can remove periods from abbreviations during formatting. EndNote cannot add periods to an abbreviated journal name.

Updating a Journal List

For EndNote to accurately use the abbreviated journal names in your bibliographies, it is important to be consistent when entering different formats of a journal name. The first column should always list the full journal name, and subsequent columns should store consistent formats of abbreviated names. See Important Points About Entering Journal Names.

Journal lists are updated automatically, from the Journal Article and Electronic Article reference types, unless you have turned off the preferences to update lists (see Term Lists Preferences). When journal lists are updated, the entry in the main Journal field goes into the first column of the list (Full Journal) and the journal entered into the Alternate Journal field goes into the second column (Abbreviation 1). Be consistent when entering data into these fields so that the Journals term list will be updated correctly. Note that if the name entered into the Journal field exists in any of the columns of the Journals term list, it is not added again. EndNote tries to avoid duplicate entries in the Journals list.

If you have turned off the preference to automatically update the term lists, you may manually update the lists as described here. When you are manually updating Journal lists, you can choose which columns in the list are used for which fields of data.

To update a journal term list:

1. Open a library and select the references from which you would like to update the Journals term list. Alternatively, use the *Search* command to find only those references that you would like to use.
2. From the *Tools* menu, choose *Define Term Lists*, and then *Journals*.
3. Click *Update List*.
4. Select the fields from which EndNote should extract the journal names. If importing from selected references, check the "Update from Selected References" option.

5. Click *OK*.

When the importing is complete, you will see a column of journal names listed in alphabetical order.

Loading Supplied Journal Abbreviations

You can load one of the supplied journal title lists to use for data entry. These lists also contain journal abbreviations for alternate output, and are used by certain output styles. The lists are supplied as plain text files in the EndNote X4\Terms List s folder. You can open and view one of these files with any word processor, but make sure to leave it a plain text file so that EndNote can import it.

To replace the existing Journals list with one of the supplied journal abbreviation lists:

1. From the *Tools* menu, select *Open Term Lists* and then *Journals Term List*.
2. Delete all existing terms from the list (you can click and drag to highlight all terms, and then click *Delete Term*).
3. Click on the Lists tab and highlight the Journals list.
4. Click *Import List*.
5. In the File dialog, navigate to the EndNote X4\Terms Lists folder, select the list you want to use, and click *Open* to import the journal names and abbreviations from the file into the Journals term list.

Creating Bibliographies with Journal Abbreviations

When you insert a journal name from the Journals term list into a reference, only the first entry for the journal name is entered. However, you can create a bibliography that uses any abbreviation in the term list by editing the style used to format the paper:

To edit a style to use journal abbreviations:

1. From the Edit menu, choose *Output Styles* and select *Open Style Manager.*
2. Select the style that you would like to edit, and click *Edit*.
3. From the list of options at the left of the Style Editor window, click Journal Names.
4. Select one of the available options.
5. Close and save the style. Now when you format a paper or look at the preview tab on the Tab pane, all of the journal names should be replaced with the appropriate abbreviation.

If a journal name in one of your references does not have the selected abbreviation entered in the Journals term list, the journal name appears in the bibliography exactly as it is entered in the Reference window.

Which Term List is Used for the Abbreviations?

Since it is possible (though not common) to have more than one multi-column journal list in a library, it is important to know how EndNote chooses which Journal list to use with the Journal Abbreviations feature. EndNote uses the multi-column list that is linked to the journal field used by the style. (For example, if the Alternate Journal field is specified by the style, EndNote uses the multi-column list linked to the Alternate Journal field.) If there is not a multi-column list that is linked to a journal field, EndNote uses the first multi-column list that it finds.

The predefined Journals term list that is added to every library is already set up as a multi-column list, and it is linked to these fields:

Journal Article reference type—Journal field

Journal Article reference type—Alternate Journal field

Electronic Article reference type—Periodical Title field

Converting Old EndNote Journals Files

If you have previously used the Journal Abbreviations feature in an earlier version of EndNote, you can import the journal names from your old Journal Abbreviations table into the Journals term list. The information in the old table is stored in the JOURNALS.EN file and it can be directly imported into the Journals term list using the *Import List* command (see Importing Terms into Term Lists).

Note: In this version of EndNote, you can have a different set of journal abbreviations for each library, and you may want to update each library similarly.

Microsoft Word/Cite While You Write

Overview of the Cite While You Write Process (Microsoft Word)

Use Cite While You Write™ (CWYW) with Microsoft® Word 2003, 2007, or 2010 to easily and quickly cite references, figures, and tables, and create a paper with properly formatted citations, a bibliography, figures, and tables. Cite While You Write gives you access to EndNote references and formatting commands with either an *EndNote X4* submenu on Word's Tools menu in Word 2003, or, in Word 2007 and 2010, with an EndNote tab .

You can start by basing your paper on a predefined Manuscript Template that is set up with publishing rules applied. Then, insert a citation into the document. A bibliography formatted according to any one of thousands of styles is created. Instant formatting technology can automatically update your citations and bibliography as you write. You can even insert figures and tables found in EndNote references.

A Traveling Library allows you to reformat references in your Word document even when your EndNote library is not available. If you are collaborating with other authors, you can rely on the Traveling Library to supply reference information.

You can use your EndNote desktop application or EndNote Web to Cite While You Write. See Using Cite While You Write with EndNote Web.

Word Processor Compatibility (Microsoft Word)

To Cite While You Write, you must use Microsoft Word 2003, 2007, or 2010 . (Please install the latest service pack from Microsoft.) Cite While You Write can convert and use Word documents that used earlier versions of Cite While You Write, although we recommend that you first unformat those documents.

Word 2003 displays Cite While You Write commands on a *Tools>EndNote X4* submenu. Word 2007 displays Cite While You Write commands on an EndNote tab.

If you use OpenOffice.org Writer as your word processor, see How to Cite While You Write with OpenOffice.org Writer .

If you use a word processor other than Microsoft Word or OpenOffice.org Writer , or an older version of these word processors, save your document as an RTF file and use Format Paper.

To create a stand-alone bibliography that is not based on the citations in a paper, see Independent Bibliographies.

Note: Only one word processor at a time should be open when inserting citations and formatting documents.

How to Cite While You Write with Microsoft Word

The basic steps required to cite a reference and generate a bibliography with Microsoft Word 2003 or 2007 are summarized below.

To Cite While You Write:

1. Open the EndNote library or libraries that contain the references you wish to cite.
2. Start Microsoft Word and open the paper you are writing. We recommend using the template wizard to create your Word documents as described in Creating a Word Document Based on a Template.
3. When you are ready to cite a source, position the cursor in the text where you would like to put the citation.

4. **Word 2003** : Go to the Tools menu in Word, then the EndNote X4 submenu, and select *Find Citation(s)*.

   Word 2007and 2010 : On the EndNote tab, in the Citations group, click *Insert Citation* and select *Find Citation* .

   An EndNote Find & Insert My References dialog appears, which may show the previous search results.

5. In the text box at the top, enter identifying text for EndNote to locate the appropriate reference. This could be an author's last name, a year, a keyword, or any other combination of terms found in the reference.
6. Click *Find* and EndNote compares the identifying text to your EndNote references and then lists the matching reference(s).
7. Identify and highlight the appropriate reference(s).
8. Use the *Insert* button triangle to display a menu, and select from:

   Insert to insert the citation and format it as defined by the currently selected output style

   Insert & Exclude Author

   Insert & Exclude Year

   Insert & Exclude Author & Year

Note: You can click *Insert* (not the triangle) to quickly select the default *Insert* command.

9. Go back to step 3 to insert the next citation, and continue citing references this way.

Note: When Instant Formatting is turned on, each time you insert a citation it is formatted and a bibliography is updated at the end of your document. When you are done inserting citations, your document is done! Instant Formatting is turned on by default.

10. If your citations are not automatically formatted, and a bibliography is not updated each time you insert a citation,

Word 2003 : G o to the Tools menu in Word, then the *EndNote X4* submenu, and select *Format Bibliography*.

Word 2007 and 2010 : On the EndNote tab, in the Bibliography group, click the corner arrow dialog box launcher.

A Format Bibliography dialog appears, where you can change, or simply verify, the style and layout of the bibliography.

Even when Instant Formatting applies, you may want to *Format Bibliography* in order to change the style or layout of your citations and bibliography.

Note: The dialog lists the styles that are currently selected as your "favorites" in the Style Manager. If you need to choose a style that is not in the list, click *Browse* to locate it.

11. Click *OK*. EndNote scans your paper and, using the selected style, formats any temporary citations, reformats formatted citations, and appends a bibliography to the end of your paper.

Your paper is ready for publication!

If you want to insert figure or table citations, see Inserting and Formatting Figures and Tables.

Notes about Microsoft Word

Installing Cite While You Write Support in Word

EndNote's installation program installs Cite While You Write support for Microsoft Word 2003 or 2007 . If you install Word *after* installing EndNote, you must either reinstall EndNote or Repair or Modify your installation. See No EndNote Commands in Word.

EndNote commands appear on an *EndNote X4* submenu of the Tools menu in Word 2003 . In Word 2007, EndNote commands appear on an EndNote tab.

Cite While You Write Commands (Word 2003)

This topic describes the Cite While You Write Commands that appear in Word 2003. If you are using Word 2007 and 2010, please see The Cite While You Write Commands (Word 2007) .

When Cite While You Write is installed, several EndNote commands appear on an *EndNote X4* submenu of the Tools menu in Word.

When you choose an EndNote command from the menu, the EndNote program starts (if not already running) and a *Cite While You Write* submenu becomes active on EndNote's *Tools* menu, displaying some of the same EndNote commands available in Word.

Note: When you use Cite While You Write Preferences to choose EndNote Web as the active Cite While You Write Application, an *EndNote Web* submenu appears on the Tools menu in Word. The *EndNote Web* submenu contains a smaller set of CWYW commands.

These are brief descriptions of the Cite While You Write commands found on the *EndNote X4* submenu of the Tools menu in Word:

Go To EndNote Bring EndNote to the front of your screen. This command launches EndNote if it is not already running.

Find Citation(s) Search for EndNote references to select and insert as citations in your Word document. See Finding and Inserting Citations.

Format Bibliography Format (or reformat) your paper according to the rules of the selected style. The formatting process replaces the temporary citations in your paper with formatted citations, and builds a bibliography at the end of the document. See Formatting the Bibliography.

Note: By default, Instant Formatting is turned on, so your citations and bibliography are automatically formatted as you work. (Instant Formatting is not available when working with EndNote Web.)

Insert Selected Citations Insert a citation for each reference currently selected in the open EndNote library. You can insert up to 250 consecutive in-text citations. See Inserting Selected Citations.

Edit Citations Edit existing individual or multiple citations. You can omit author and/or year from citations, or add prefix or suffix text (such as page numbers) to citations. See Editing Citations.

Insert Note Add custom text citations to your Word document. See Inserting Notes in the List of References.

Edit Library Reference(s) Select citations in your Word document, then choose this command to directly edit the corresponding references in EndNote. See Editing a Reference in the Library.

Unformat Citation(s) Unformat a selected citation before editing it, or unformat the whole document. This removes style formatting for the selected citations, and leaves temporary citations which usually consist of the author's last name, the year, and the record number surrounded by delimiters. See Unformatting Citations.

Remove Field Codes Save a copy of your document without formatted Cite While You Write field codes. Formatted citations and the bibliography are saved as text. See Removing Field Codes.

Export Traveling Library Create an EndNote library from the references used in a paper. See Exporting Word's Traveling Library.

Find Figure(s) Search for an EndNote reference that contains an image, and insert a figure or table citation in your Word document. The citation is numbered, and the figure or table is automatically added to the document. See Finding and Inserting Figures and Tables.

Generate Figure List Update your figure and table citations plus the formatted figures and tables found within the body of the document or in a list at the end of the document. See Updating Figures and Tables.

Cite While You Write Preferences Change general Cite While You Write preferences, change the EndNote keyboard shortcuts available in Word, change figure and table settings, or switch to EndNote Web Cite While You Write. See Setting Cite While You Write Preferences.

Help Display help about Cite While You Write features.

You may prefer to execute these commands from the keyboard. Note the keyboard shortcuts defined under *Cite While You Write Preferences*.

You can also use the corresponding EndNote toolbar for easy access.

The title that appears on the toolbar indicates which EndNote application is in use to Cite While You Write: *EndNote X4* (your desktop application) or *EndNote Web*. For more information about EndNote Web, see Overview of EndNote Web and Using Cite While You Write with EndNote Web. EndNote Web offers a limited number of Cite While You Write commands.

Note: Several Cite While You Write commands also appear on the Tools menu in EndNote. To use these commands from within EndNote, you must use at least one Cite While You Write command from within Word during the current session.

Cite While You Write Commands (Word 2007 and Word 2010)

This topic describes the Cite While You Write Commands that appear in Word 2007 and 2010. If you are using an earlier version of Word, please see The Cite While You Write Commands.

When Cite While You Write is installed, several EndNote commands appear on an EndNote tab in Word 2007 and 2010. When you choose an EndNote command from the tab, the EndNote program starts (if not already running) and a *Cite While You Write* submenu becomes active on EndNote's Tools menu, displaying some of the same EndNote commands available in Word.

Note: When you use Cite While You Write Preferences to choose EndNote Web as the active Cite While You Write Application, an *EndNote Web* tab appears in Word. The *EndNote Web* tab displays a smaller set of CWYW commands than the EndNote desktop application.

Below are brief descriptions of the Cite While You Write commands that are found on the EndNote tab on the Word 2007 and 2010 ribbon.

Citations Group

Insert Citation > Find Citation(s) Search for EndNote references to select and insert as citations in your Word document. See See Finding and Inserting Citations.

Insert Citation > Insert Note Add custom text citations to your Word document. See Including Notes in the List of References.

Insert Citation > Insert Selected Citations Insert a citation for each reference currently selected in the open EndNote library. You can insert up to 250 consecutive in-text citations.

Insert Citation > Find Figure(s) Search for an EndNote reference that contains a figure, and insert a figure or table citation in your Word document. The citation is numbered, and the figure or table is automatically added to the document. See Inserting Selected Citations.

Go To EndNote Bring EndNote to the front of your screen. This command launches EndNote if it is not already running.

Edit Citations Edit existing individual or multiple citations. You can omit author and/or year from citations, or add prefix or suffix text (such as page numbers) to citations. See Editing Citations.

Edit Library Reference(s) Select citations in your Word document, then choose this command to directly edit the corresponding references in EndNote.

Bibliography Group

Style Select an output style from the list to format (or reformat) your paper according to the rules of the selected style. The styles listed are marked as "favorites" in the EndNote style manager.

Update Citations and Bibliography Format (or reformat) your paper according to the rules of the selected style. The formatting process replaces the temporary citations in your paper with formatted citations, and builds a bibliography at the end of the document. This command also updates your figure and table citations plus the formatted figures and tables found within the body of the document or in a list at the end of the document.

Convert Citations and Bibliography > Convert to Unformatted Citations Unformat a selected citation before editing it, or unformat the whole document. This removes style formatting for the selected citations, and leaves temporary citations which usually consist of the author's last name, the year, and the record number surrounded by delimiters. Use *Update Citations and Bibliography* to format the paper again. See Unformatting Citations.

Convert Citations and Bibliography > Convert to Plain Text Save a copy of your document without formatted Cite While You Write field codes. Formatted citations and the bibliography are saved as text. See Removing Field Codes.

Convert Citations and Bibliography > Convert Word 2007 Citations to EndNote Convert any Word 2007 citations in this document to EndNote Cite While You Write citations.

Format Bibliography Click the arrow in the bottom right corner of the Bibliography section to display a tabbed dialog of formatting options. When you click *OK* to leave the dialog, EndNote formats (or reformats) your paper according to the rules of the selected style. See Formatting the Bibliography.

Note: By default, Instant Formatting is turned on, so your citations and bibliography are automatically formatted as you work.

Tools Group

Export to EndNote > Export Traveling Library Create an EndNote library from the references used in your paper. See Exporting Word's Traveling Library.

Export to EndNote > Export Word 2007 Citations Create an EndNote library from the Word 2007 citations found in the document.

Export to EndNote > Export Word 2007 Master List Create an EndNote library from the Word 2007 master list of citations.

EndNote Preferences Change general Cite While You Write preferences, change the EndNote keyboard shortcuts available in Word, change figure and table settings, or switch to EndNote Web Cite While You Write. See Setting Cite While You Write Preferences.

Help Display help about Cite While You Write features.

You may prefer to execute these commands from the keyboard. Note the keyboard shortcuts defined under *Cite While You Write Preferences*.

The title that appears on the toolbar indicates which EndNote application is in use to Cite While You Write: *EndNote* (your desktop application) or *EndNote Web*. EndNote Web offers a limited number of Cite While You Write commands.

Note: Several Cite While You Write commands also appear on the Tools menu in EndNote. To use these commands from within EndNote, you must use at least one Cite While You Write command from within Word during the current session.

Field Codes (Microsoft Word)

Cite While You Write places field codes around and inside your formatted citations in Word. These hidden codes allow EndNote to format, unformat, and reformat citations within Word.

For example, this formatted citation:

(Schwartz and Billoski 1990)

appears with these field codes:

{ADDIN EN.CITE
<EndNote><Cite><Author>Schwartz</Author><Year>1990</Year><RecNum>11</RecNum><record><database name="Paleo.enl" path="C:\Program Files\EndNote 8\Examples\Paleo.enl">Paleo.enl</database><source-app name="EndNote" version="8.0">EndNote</source-app><rec-number>11</rec-number><ref-type name="Book Section">5</ref-type><contributors><authors><author><style face="normal" font="default" size="100%">Schwartz, M.T.
Billoski, T.V.</style></author></authors><secondary-authors><author><style face="normal" font="default" size="100%">B.T. Jones
Lovecraft, N.V.</style></author></secondary-authors></contributors><titles><title><style face="normal" font="default" size="100%">Greenhouse hypothesis: effect on dinosaur extinction</style></title><secondary-title><style face="normal" font="default" size="100%">Extinction</style></secondary-title></titles><periodical><full-title><style face="normal" font="default" size="100%">Extinction</style></full-title></periodical><pages><style face="normal" font="default" size="100%">175-189</style></pages><keywords><keyword><style face="normal" font="default" size="100%">Dinosaurs</style></keyword><keyword><style face="normal" font="default" size="100%">Extinction</style></keyword></keywords><dates><year><style face="normal" font="default" size="100%">1990</style></year></dates><pub-location><style face="normal" font="default" size="100%">New York</style></pub-location><publisher><style face="normal" font="default" size="100%">Barnes and Ellis</style></publisher><urls></urls></record></Cite></EndNote>}

Note: We recommend that you *not* view field codes in Word. If you choose to view field codes, please do not modify them. Always keep backups of your papers! To automatically turn off the display of field codes when you open a Word document, see General Preferences for Microsoft Word.

Field codes for formatted citations include a Traveling Library of the EndNote references cited. The reference data saved with each citation includes all fields except Notes, Abstract, Figure, and Caption. This allows you to use the document on a computer that does no t contain a copy of your EndNote library.

EndNote's Cite While You Write field codes are supported by Word 2003 and 2007 . Once you start using Cite While You Write, you must take precautions before opening those files in other word processors or another

version of Word. If a formatted document is opened and saved with an incompatible word processor, the formatted EndNote citations and bibliography lose their field codes. When this happens, EndNote cannot reformat the document.

Before you open a paper in a different word processor or give a publisher an electronic copy of your final formatted document, please see Sharing Your Word Documents.

Using Predefined Manuscript Templates

Using Predefined Manuscript Templates (Microsoft Word)

Many predefined Microsoft Word manuscript templates are supplied with EndNote to ease electronic submissions to publishers. We provide them as guides to make your writing process easier, but they are not required in order to use Cite While You Write. Plus, you can use a manuscript template even when you do not plan to use Cite While You Write on that particular document.

When you use one of these templates to start your paper, many formatting issues are already set up for your target publication, such as proper margins, headings, pagination, line spacing, title page, abstract page, graphics placement, and font type and size. As with bibliographic formats, there are hundreds of variations between publishers.

See Creating a Word Document Based on a Template.

Creating a Word Document Based on a Template

You can start a new Microsoft Word document based on predefined templates either from within EndNote or directly from Word. You can also copy and edit one of the predefined manuscript templates.

From Within EndNote

To create a document based on one of the predefined manuscript templates:

1. Start EndNote.
2. From the Tools menu, select *Manuscript Templates*.
3. In the File dialog, browse to the Templates folder found in the EndNote folder. (EndNote should automatically select this location.)
4. Select and open the template named for a particular editorial style guide or the publisher to which you intend to submit your manuscript.

   This opens a new document in Microsoft Word that is based on the template file, and starts a manuscript template wizard to help you set up your paper.

Note: The first time you launch the manuscript template wizard, you may receive a notice about macros. Accept macros to continue with the wizard.

5. Enter the information requested by the template wizard. See Supplying Information to the Template Wizard.

As you enter information, the wizard places it in all of the appropriate places in the document. The windows that appear, and the information requested, varies depending upon the publisher.

6. To complete the wizard:

   Click *Next* to continue providing information. If you do not know how to respond to an information request, simply click *Next* to continue with the wizard. You can later enter the appropriate information in the designated, bracketed fields in Word.

   On the final template wizard window, click *Finish* to close the wizard and start writing!

Note: You can click *Finish* at any time to bypass the wizard and start working in the document. You will need to manually enter information that would have been inserted by the wizard. Clicking *Cancel* will stop the creation of a new document.

The resulting Word document already contains the information you provided to the wizard. To start entering text into the document, look for indicators to guide you. See Writing Your Paper.

From Within Word 2003

To use a manuscript templates from within Word 2003 :

1. Start Microsoft Word.
2. From Word's File menu, select
3.

4.
   5.

1.
2.
3.
4.
5.

1.
2.
3.
4.
5.

1.
2.
3.
4.
5.

Supplying Information to the Template Wizard (Microsoft Word)

The EndNote document template wizard asks you to supply information, required by the publisher, which the wizard then places in your document. If the same information is required in more than one place, you enter it once and the wizard copies it as needed to the appropriate places and in the appropriate format.

Each publisher maintains its own guidelines, and those guidelines vary greatly. As you follow the wizard, you may be asked for:

Title

Depending on the publisher, you may be asked to provide the full title as well as a short title or running header.

Author Contact Information and Affiliation

Publishers typically require author information on title pages, but they may also require it in acknowledgements or in headers throughout the document. You should provide information about each contributing author.

Click *Add Author* to type information about each contributing author. You also have the option to click Address Book to link to an existing Outlook address book and easily insert existing author information.

Once you add an author name with contact information, it is retained in an Authors on File list to use later. For subsequent papers, you can simply select names from the list.

Select the check box next to the corresponding author (the contact person).

Keywords

Almost every publisher requires that you provide keywords for indexing the manuscript. You can either provide your own keywords, or the publisher may require MeSH terms (the National Library of Medicine's Medical Subject Headings).

Sections

The manuscript sections required by the publisher are listed, such as Abstract, Introduction, Acknowledgements, Reference List, Tables, and Figures. These requirements vary significantly between publishers. The wizard lists the required sections, but you can select or remove sections as needed.

Note: If you need help on one of the windows, press the F1 button on your keyboard to display a context-sensitive help topic.

Writing Your Paper (Microsoft Word)

You selected the Word template appropriate for your publisher. Then, you followed the template wizard to provide basic information, so your new Word document already contains that information. Now, you are ready to write your paper.

Tag Line Indicators

To start entering text into the document, look for tag line indicators to guide you. For example, you may see a tag that says:

[Insert Introduction text here (no subheadings)]

You can select this tag and overwrite it as you type the introduction. Next, you may see:

[Insert Acknowledgements here]

Again, select the tag and overwrite it as you type your acknowledgements.

Most of the sections of the paper are tagged in this way. These tags may tell you of character limits, indicate whether you should include subheadings, and contain font and style formatting. They organize your manuscript and help you follow the rules of the publisher.

Cite While You Write Markers

There are several instances where a section tag acts as a marker for Cite While You Write:

Figure Lists: When you insert a figure citation into your document, and the current output style is set to create a figure list at the end of the document, the figure list is created at a [Figures] tag. To change the position of the figures in your document, or to move the figure list to a separate file, see Placing Figures and Tables.

Table Lists: When you insert a figure citation where the image comes from EndNote's Chart/Table reference type, and the current output style is set to create a table list at the end of the document, the table list is created at a [Tables] tag. To change the position of the tables in your document, or to move the table list to a separate file, see Placing Figures and Tables.

Bibliographies: When you insert an in-text reference citation in the body of your document, the bibliography is created at the [References] tag.

The manuscript template applies a corresponding output style to the bibliography. For example, the Nature manuscript template would use the Nature output style to format the bibliography, although you can apply a different output style if you wish.

Citing Sources as You Write

Forms of Citations (Microsoft Word)

A "citation" is the brief bibliographic information in the body of a paper that refers the reader to a complete reference in the bibliography. A citation typically consists of a bibliography number or the author and year in parentheses:

... of the species at hand[1].

... of the species at hand (Argus, 1991).

Citations can appear as either unformatted or formatted in your Word document.

Unformatted (Temporary) Citations

An unformatted citation is a temporary placeholder, and does not reflect final output. It may appear after you *Find Citation(s)* and *Insert*, *Insert Selected Citation(s)*, drag-and-drop or copy and paste citations from EndNote to Word, *Unformat Citation(s),* or manually enter unformatted citations. It contains information to find a unique, corresponding EndNote reference in the currently open library.

Note: If you have Instant Formatting turned on, you may never see an unformatted citation. Instant Formatting is turned on by default.

An unformatted citation typically consists of the first author's last name, year, and the EndNote record number, with citation delimiters at each end to identify the text:

{Author, Year #Record Number}.

For example:

{ Alvarez, 1994 #8}

The unformatted citation makes it easy to identify the record cited. Even if your final goal is numeric citations, you can see meaningful information while you are working on your document.

EndNote relies on these temporary citations to determine which references to include in the bibliography.

Formatted Citations

The *Format Bibliography* command uses an output style to convert all unformatted citations into formatted citations, and reflects final output.

Note: When Instant Formatting is turned on, formatting is done as you insert citations–but you can still use *Format Bibliography* to change the style or layout of your citations and bibliography.

Formatted citations include hidden Word field codes in case you want to *Format Bibliography* again later, either after adding more citations or because you want to format in a different style.

Citations formatted in an Author-Date style might look like this:

(Alvarez 1994; Turnhouse 1987)

This is the same citation formatted in the Numbered style:

[1,2]

You can easily revert from formatted citations back to unformatted citations at any time. See Unformatting Citations.

Finding and Inserting Citations (Microsoft Word)

You can search for EndNote references and insert them without ever leaving Word.

This is the easiest way to find and insert a citation into a Word document:

1. Open the EndNote libraries that contain the references you wish to cite.
2. Open the Word document and position the cursor at the location where you would like the citation.
3. **Word 2003** : From Word's *Tools* menu, select the *EndNote X4* submenu and *Find Citation(s)* to display the EndNote Find & Insert My References dialog.

   Word 2007 and 2010 : On the EndNote tab, in the Citations group, click *Insert Citation* and then *Find Citation* .
4. In the text box at the top, enter text to identify the reference you wish to cite. EndNote assumes an "and" between each word, and will search all fields in your records.
5. Click *Find* and EndNote compares the text to text in your EndNote references and lists the matching reference(s).
   If no references match your text, you need to modify your search text and click *Find* again.
6. Identify and highlight the appropriate reference(s).
7. Use the *Insert* button triangle to display a menu, and select from:

   Insert to insert the citation and format it as defined by the currently selected output style

   Insert & Exclude Author

   Insert & Exclude Year

   Insert & Exclude Author & Year

Note: You can click *Insert* (not the triangle) to quickly select the default *Insert* command.

Citations are inserted directly into your paper in the same font as the surrounding text. Once a citation is inserted, it contains complete reference information in hidden codes.

You can insert citations in an existing manuscript or as you write. Remember to *Save* your document as you work.

To format your citations and generate a bibliography, see Formatting the Bibliography. In most cases, Instant Formatting applies as you insert citations.

Inserting Selected Citations (Microsoft Word)

To insert references selected in EndNote:

1. Open the Word document and position the cursor at the location where you would like the citation.
2. **Word 2003** : From the Tools menu in Word, go to the EndNote X4 submenu and then *Go to EndNote*.

   Word 2007 and 2010 : On the EndNote tab, in the Citations group, click *Go to EndNote* .
3. Highlight the desired reference(s) in your EndNote library.
4. **Word 2003** : From the Tools menu in EndNote, select the *Cite While You Write* submenu and choose *Insert Selected Citation(s)*.

   Word 2007 and 2010 : On the EndNote tab, in the Citations group, click *Insert Citation* and then *Insert Selected Citation(s)* .

Finding and Inserting from Highlighted Text (Microsoft Word)

To find and insert a citation from highlighted text:

1. As you are typing, enter text to identify the reference you wish to cite, and highlight that text.
2. **Word 2003** : From Word's Tools menu, select the EndNote X4 submenu and *Find Citation(s)* to display the EndNote Find & Insert My References dialog.

   Word 2007and 2010 : On the EndNote tab, in the Citations group, click *Insert Citation* and then *Find Citation* .

EndNote inserts your highlighted text into the Find box. Use the Find & Insert My References dialog as described in Finding and Inserting Citations.

Using Drag-and-Drop or Copy and Paste (Microsoft Word)

You can drag selected citations from your EndNote library and drop them into your paper at the desired location for the citation.

You can also copy citations from the EndNote Library window and paste them into the document (using *Copy* from EndNote's Edit menu and then *Paste* from Word's clipboard).

Inserting Multiple Citations (Microsoft Word)

There are several ways to insert multiple references in one in-text citation. When formatted, they appear as one multiple citation, sorted as your bibliographic style requires:

Unformatted: {Hall, 1988 #77; Baker, 1988 #16}

Formatted: (Baker, 1988; Hall, 1988)

You can insert up to 250 consecutive in-text citations, although the limit could be lower depending upon the number of fields being formatted with the output style you have chosen.

Note: If one of the citations in a multiple citation is not matched during formatting, the entire citation remains unformatted. Notes cannot be inserted as part of a multiple citation.

To insert multiple citations from Word:

1. **Word 2003** : From the Tools menu in Word, go to the EndNote X4 submenu and select *Find Citation(s)*.

   Word 2007 and 2010 : On the EndNote tab, in the Citations group, click *Insert Citation* and then *Find Citation* .
2. Enter a generic search term that will find the references you want, and click *Find*.
3. Hold down the Ctrl key while clicking on the desired references in the list (or hold down the Shift key to select a continuous range of references) in order to highlight the references.
4. Click *Insert*.

To insert multiple selected citations from EndNote:

1. In EndNote, hold down the Ctrl key while clicking on the desired references in your library (or hold down the Shift key to select a continuous range of references).
2. **Word 2003** : From EndNote's *Tools* menu, go to the *Cite While You Write* submenu and choose *Insert Selected Citation(s)*.

   Word 2007 and 2010 : On the EndNote tab, in the Citations group, click *Insert Citation* and then *Insert Selected Citation(s)* .

To insert multiple citations individually:

Another option is to insert citations individually, but immediately next to each other. Cite While You Write merges adjacent citations during formatting. Citations do not merge if *any* character separates them–including a space or punctuation mark.

Unformatted: {Hall,1988 #77}{Baker, 1988 #16}

Merged when Formatted: (Baker, 1988; Hall, 1988)

Note: You can add citations to an existing in-text citation, or change the order of citations within the delimiters with the Edit Citations dialog.

To insert, remove, or edit citations within an existing in-text citation:

1. Click on the formatted citation.
2. **Word 2003** : From Word's *Tools* menu, go to the *EndNote X4* submenu and *Edit Citation(s)* to display the EndNote X4 Edit & Manage Citations dialog.

   Word 2007 and 2010: On the EndNote tab, in the Citations group, click *Edit Citation(s)* .

   All of the cited references in the document are listed in the left column of the dialog. An ellipses shows where a citation appears within text. The line below shows the cited reference(s).
3. Highlight a citation, and then:

   Click *Remove* to delete it.

   Click *Insert* to insert another citation within the same set of delimiters.

   Use the arrow buttons to change the order of the citation in a multiple citation. (If a Citation Sort Order is applied by the current output style, changing the order of citations in a multiple citation has no effect.)

You can use the other features on this dialog as described in Customizing Individual Citations.

Inserting From Multiple Libraries (Microsoft Word)

You can cite references from multiple libraries. Simply open the selected libraries before you begin inserting citations.

If possible, though, we recommend that you use a single library when writing a paper. Keeping all of your references in one library simplifies the writing process because you know exactly where to find each reference, there is little likelihood of duplicate references, and you only need to have one library open when inserting citations.

Note: If you plan to insert citations from more than one library into a paper, read about the Merge Duplicates in Bibliography preference

Customizing Individual Citations (Microsoft Word)

There may be cases where you want individual citations to differ from the standard format. You may want to remove the year or author from a citation if either was mentioned in the context of the sentence. Or, you might want to add a page reference or comment before or after the citation.

For example, assume a formatted citation looks like this:

Hall's discovery (Hall, 1988)

You can omit the author's name from the citation:

Hall's discovery (1988)

You can omit the date from the citation:

the 1988 discovery (Hall)

You can add a suffix with page number to the citation:

the discovery (Hall, 1988 p.4)

You can add a prefix to the citation:

the discovery (see Hall, 1988)

To customize a formatted citation:

1. Insert and format the citation.
2. Click on the formatted citation.
3. **Word 2003** : From Word's *Tools* menu, go to the *EndNote X4* submenu and *Edit Citation(s)* to display the EndNote X4 Edit & Manage Citations dialog.

   Word 2007and 2010 : On the EndNote tab, in the Citations group, click *Edit Citation(s)* .

   All of the cited references in the document are listed in the left column of the dialog. An ellipses shows where a citation appears within text. The line below shows the cited reference(s).
4. Highlight the citation you want to customize.
5. Customize as needed:

   Exclude Author: Select this to omit the author name from the formatted citation.

   Exclude Year: Select this to omit the date from the formatted citation.

   Prefix: Enter text here to print immediately before the citation text (spaces are significant).

   Suffix: Enter text here to print after the citation text (spaces are significant). You can enter page numbers here if you always want them to print *after* the citation.

   Pages: Page numbers entered here are considered entered into a "Cited Pages" field, so they can be manipulated on output just like any other EndNote field. In order to print, the Cited Pages field must be listed in the citation template and/or footnote template of your output style. This is typically used to print the page numbers within a full footnote citation. Most EndNote styles that require a special format for citations in footnotes are already configured this way. You can modify the Citation Template in your output style to include Cited Pages.
6. Click *OK* to implement the change(s) to the citation.

Including Notes in the List of References (Microsoft Word)

Some journal styles (such as Science) require that you include notes along with the list of works cited at the end of the document. In such a system, notes are numbered just like citations, and are included in the reference list in order of appearance, along with bibliographic references.

Including notes in this way makes sense only when you are formatting your paper with a numbered style (not an author- date style).

To insert text as a numbered note in the reference list:

1. Position the cursor at the location in your text where you would like the number indicating the note.
2. **Word 2003** : From the Tools menu, go to the EndNote X4 submenu and select *Insert Note* to display the EndNote Insert Note dialog.

Word 2007 and 2010 : On the EndNote tab, in the Citations group, click *Insert Citation* and then *Insert Note* .

3. Type your note text into the text box. There is no limit on the amount of text you can enter.
4. Click *OK* to insert a numbered note.

When your paper is formatted by EndNote using a numbered style, the note text is assigned a number and listed along with the references at the end of the paper.

The way that notes are displayed when unformatted can be changed in the Temporary Citations preferences.

To manually type text as a numbered note in the reference list:

1. Type the text into the body of your document where you would want the number for the note to appear.
2. Be sure to surround the entire section of text with your Temporary Citation Delimiters (curly braces by default), and begin it with "NOTE:". For example:

{NOTE: The authors would like to acknowledge the support of...}

Restrictions on the Use of the "NOTE" Feature:

This feature requires that a numbered style be used for formatting; otherwise, the note appears as text in the body of your paper.

Enter alphanumeric text only. Do not enter graphics, equations, or symbols.

Do not use the temporary citation delimiters as part of the text of the note. Other markers, such as the record number marker, the prefix marker, and the multiple citation separator may be used.

Notes cannot be combined with regular bibliographic citations within the same set of delimiters (such as parentheses or brackets). They must be cited separately— each in its own set of delimiters.

Inserting Citations into a Formatted Paper (Microsoft Word)

If you need to add one or more citations to a paper that has already been formatted, simply insert the new citations into the text (as described earlier in this chapter) and choose *Format Bibliography* when you are ready to update the bibliography and citations.

To add a new reference to an existing citation, insert the new reference *next to* (not within) the existing citation, like this:

(Hockney and Ellis, 1996){Argus, 1984 #1}

Adjacent citations are merged during formatting, and the formatted citations are sorted according to the style:

(Argus, 1984; Hockney and Ellis, 1996)

Note: Do not insert a citation into the middle of a formatted citation. Insert it immediately before or after the existing citation, with no space between them.

Citing References in Footnotes and Endnotes (Microsoft Word)

Once you have created a footnote or endnote in Word, you can cite references in that footnote or endnote just like you cite them in the body of the document.

To cite a reference in a footnote or endnote:

1. Use the appropriate command in Word to create the footnote or endnote. (EndNote does not create the footnote or endnote in the document, but is used to insert and format citations in the note.)
2. Position the cursor in the footnote or endnote where you would like the citation(s) to appear.
3. Insert the citation as you normally would.

The EndNote style that is selected when you choose *Format Bibliography* determines how citations in footnotes and endnotes are formatted. EndNote can format these citations as brief in-text citations or like complete references in the bibliography. It can also create a special format specific to footnotes or endnotes, including options like "Ibid." and other variations of shortened references when a citation appears more than once in the footnotes or endnotes. See Bibliography and Footnote Templates.

If you are citing full references in footnotes, you can include specific page numbers to be formatted like a regular EndNote field. See Customizing Individual Citations. Or, if you are manually typing citations, see Citing Specific Page Numbers in Footnotes.

Typing Citations into Your Paper

Typing Citations into Your Paper (Word)

There are many ways to insert citations in your paper. The most flexible way is to manually type temporary citations directly into your paper. Your hands never have to leave the keyboard.

The rules described in the following topics govern how EndNote recognizes and interprets temporary (unformatted) citations. Use these rules when typing temporary citations directly into your document.

Note: Even when Instant Formatting is enabled, it is not triggered when you manually type a reference into a document. You must use the *Tools>EndNote X4* menu (or the EndNote tab in Word 2007 and 2010) and either insert another reference with the *Find Citation(s)* command or choose *Format Bibliography* to format or update citations and a reference list (you can use *Update Citations and Bibliography* in Word 2007) .

Notes About Temporary Citations
Components of a Temporary Citation
Omitting Authors or Years from Citations
Citation Prefixes
Citation Suffixes
Including Semicolons & Other Citation Delimiters in a Citation
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Notes About Temporary Citations

Each citation must match only one reference in the library.

When Instant Formatting is turned off, a temporary citation is enclosed in citation delimiters and typically includes the first author's last name, the year of publication, and the record number for that reference: { Schwartz, 1990 #5}.

Within one set of citation delimiters you can have several citations separated by semicolons:

{ Schwartz, 1990 #5; Billoski, 1992 #28}.

Curly braces ("{" and "}") are the default temporary citation delimiters, although they can be changed (see Temporary Citations). EndNote looks for these markers to find citations in your word processing documents.

In addition to the citation delimiters, these are other possible components to a temporary citation: Author, Year, Record Number, Prefix Text, Suffix Text, and any other text found in the record.

Any part of a temporary citation can be omitted, as long as enough information remains to match just one reference in the library. If you omit an author or year from a temporary citation, those components are omitted from the formatted citation as well—although you can change this preference. See Omitting Authors or Years from Citations.

Components of a Temporary Citation

The typical EndNote temporary (unformatted) citation consists of an author's last name, a year, and a record number, all enclosed in citation delimiters. However, temporary citations can take on various other formats.

Temporary citations must begin and end with the opening and closing citation delimiters, but the other components of a temporary citation can vary.

You can type any string of text found in the reference, as in:

{dinosaur extinction}

Or, you can type any of these items in this order (comma placement is significant):

{Prefix \Author, Year #Record Number Suffix}

{Prefix \Author, Year, Any Text, Suffix}

Each component is briefly described below; more detailed information follows.

Author's Last Name: Only the last name of one author is listed in a temporary citation. It can be any author associated with the reference, and not just the first author. Include a comma after the author's name to limit the search only to author fields:

{ Schwartz, 1990}

Year: The year should appear exactly as it does in the reference, and it should be preceded by a comma. Even if you leave out the author name, include a comma before the year to limit the search to the Year field:

{, 2001}

Record Number: The record number is EndNote's unique number for a reference. It is the only part of a temporary citation that you can count on to *always* identify just one reference in your library. The record number must be preceded by a number sign:

{Jones, 1987 #84}

Any Text: Any text that appears in the reference can be used to help EndNote locate the reference in the library. In order for this to be helpful, choose words that are unique to that reference. Enter the specific text only, or enter the text in place of the record number part of the temporary citation and after a second comma:

{ greenhouse}

{ Schwartz, 1990, greenhouse}

{ Schwartz, , greenhouse}

In the third example, where the date is omitted, you must insert a space between the two commas or EndNote will not recognize any citation matches.

Prefix Text: To add text to print before the formatted citation, type the text immediately after the opening brace and then a backslash "\" to separate prefix text from the search text:

{see \Jones, 1987 #84}

Suffix Text: To add text to print after a formatted citation, enter the suffix text immediately after the record number or enter a *third* comma after the search text and then type the suffix text:

{Smith, 1995 #98 p.293}

{Smith, 1995, dinosaur, p.293}

Note: For an easy way to modify individual Cite While You Write citations once they are formatted, see Editing Citations.

Omitting Authors or Years from Citations

While your style may normally include the author's name and date in each in-text citation, you may want to omit the author and/or year from a particular citation. This is useful if you have mentioned the author or year in the context of the sentence and do not want to repeat the information in the citation.

To remove the author's name or date from a citation, simply leave that information out of the unformatted citation.

To omit the author's name, enter:

... Wyatt's recent discovery {, 1993 #38}.

which will format as:

... Wyatt's recent discovery (1993).

To omit the date, enter:

...about his 1993 discovery { Wyatt, #38}.

which will format as:

...about his 1993 discovery (Wyatt).

Note: *Numbered* citations do not print the author name or year in any case, so these settings would be ignored.

If you want a reference to appear in your bibliography, but not as a citation in your paper, you can exclude both the author and year, leaving only the record number. When you format your paper with a style that formats authors and years in the citations, this particular citation will not display in text, but will be included in the bibliography.

However, if you would rather have the author and year appear in the formatted citation regardless of whether or not they are in the temporary citation, choose *Preferences* from EndNote's *Edit* menu, select the *Formatting* option, and uncheck the setting to "Omit Author and/or Year from formatted citation if removed from temporary citation." With this setting turned off, you may enter just the record number "{#34}" as a temporary citation, and still format the paper accurately with a style that requires authors and years in the in-text citations.

Note: For an easy way to modify individual Cite While You Write citations once they are inserted, see Editing Citations.

Citation Prefixes

You can type a prefix in front of any *unformatted* in-text citation, using a backslash to separate the prefix text from the reference. For example, an in-text citation such as:

{see also \Hall, 1988 #77}

formatted in the APA style would be:

(see also Hall, 1988)

When there is only one prefix in a multiple citation and it is at the beginning of the citation, it will stay there regardless of how the citations are sorted. For example, this citation:

{e.g. \Hall,1988 #77; Argus, 1991 #11}

after being formatted in the APA style will appear as:

(e.g. Argus, 1991; Hall, 1988)

If the prefix is not at the beginning of the multiple citation, or if there is more than one prefix in a multiple citation, the prefix text remains with the reference it precedes. For example, this citation:

{Argus, 1984 #11; especially \Hall, 1988 #77}

formatted in the Author-Date style will be:

(Argus, 1984; especially Hall, 1988)

Changing the Citation Prefix Marker

You can change the prefix marker from a backslash to another character by choosing *Preferences* from EndNote's Edit menu, selecting the *Temporary Citations* option, and changing the character in the "Citation Prefix Marker" box. Use a character that is not otherwise used in the citations. Letters, numbers, semicolons, "@" and commas cannot be prefix markers. See Temporary Citations.

Citation Suffixes

Text typed after the record number or search text in an unformatted citation appears immediately after the citation when it is formatted. For example, these citations:

{Hall, 1988 #77, p. 5}

{Smith, 1995, dinosaur,, p.293}

after being formatted in the APA style will appear as:

(Hall, 1988, p. 5)

(Smith, 1995, p.293)

In multiple citations, the suffix text remains with the citation that it follows, even if the citations are sorted differently during the formatting process. For example, this citation:

{Hall, 1988 #77 p. 5; Argus, 1991 #11}

formatted in the Author-Date style will be:

(Argus, 1991; Hall, 1988 p. 5)

Including Semicolons and Other Citation Delimiters in a Citation

In order to print an actual semicolon or the prefix marker (\) as part of a citation, type an accent grave (`) before the character. The accent grave tells EndNote to treat the following character as regular text, and not as a significant character for parsing the citation. For example, to create a citation that is formatted as:

(see Figure 1; Jackson, 1994)

the unformatted citation must look like this:

{see Figure 1`; \Jackson, 1994 #28}

The ` character before the semicolon tells EndNote not to treat the semicolon as a separator between citations.

Citing Specific Page Numbers in Footnotes

When citing full references in footnotes, you might want to include specific page numbers. EndNote provides a way to do this where the page numbers that you type into a temporary citation can be manipulated by the EndNote style just like a field in your EndNote reference. You can add specific pages to the temporary citation, and have the EndNote style include them wherever they need to be in the formatted citation. The style can also apply special pages formatting, like deciding whether to add "p." or " pp." before the page numbers, and how to list the range of pages.

The easiest way to add cited pages is to use the Edit Citation dialog.

To manually include specific page numbers to a reference in an unformatted footnote citation, simply enter the page number preceded by "@" at the end of the temporary citation:

{Smith, 1999 #24 @145-6}

All text that follows the @ symbol (up to the next space) is considered the "Cited Pages." You must also configure the EndNote style used to format the paper to use "Cited Pages" in the footnote template. Most EndNote styles that require a special format for citations in footnotes are already configured this way.

When EndNote formats the citation, the cited pages ("145-6" in the example above) are inserted in the correct location and formatted as appropriate for the style.

Note: If you enter page numbers at the end of the temporary citation without the "@" character, they will still appear in a formatted *in-text* citation, but EndNote will not be able to manipulate them by changing the page format or by moving them to a different position in the formatted citation. They will simply appear, as entered, at the end of the formatted in-text citation. This is a perfectly acceptable way to enter page numbers for in-text citations (or for footnotes formatted just like your in-text citations). See Citation Suffixes to see how this works. This method will not work for citations in footnotes that are formatted as full bibliographic references or with a special footnote format. For those cases, you must use the @ symbol to identify the cited pages in the temporary citation.

Examples of Modified Citations

The following examples demonstrate how different modifications to a temporary citation affect its formatted citation in either an author/year or numbered style. In the first column is an example of a modified temporary citation before formatting, and to the right are two examples of that citation formatted in different styles.

Examples of Modified Citations

Unformatted Citation	Formatted with Author-Date	Formatted with Numbered	Comments
{Hall, #77}	(Hall)	[1]	To remove the year from the formatted citation, simply delete it from the unformatted citation.
{, 1988 #77}	(1998)	[1]	To remove the author from the formatted citation, delete just the author's name from the unformatted citation. Note that the comma remains in the temporary citation to indicate the omission of the author.
{#77}	No citation appears	[1]	This temporary citation removes the author and the year from the formatted citation. When formatted with an author-date style, the in-text citation is eliminated, but the reference still appears in the bibliography. Numbered citations appear as usual.
{Hall,1988 #77 p.4}	(Hall 1988 p.4)	[1 p.4]	To add text after the formatted citation, add it after the record number in the unformatted citation. With this temporary citation, the text after the record number, including spaces and punctuation, is added to the formatted citation.

{see \Hall, 1988 #77}	(see Hall 1988)	[see 1]	To add text before the formatted citation, type the text immediately after the opening curly brace, and type a backslash "\" to separate the text from the author's name. (See Citation Prefixes.
{Hall, #77, p.4}	(Hall, p.4)	[1, p.4]	This temporary citation eliminates the year from the formatted citation, but adds the additional text ", p.4". Type additional text after the record number or after a third comma when using additional search text.

Changing Existing Citations

Editing Citations (Microsoft Word)

Once you have inserted and formatted a citation, you should not edit it directly (although you *can* do so, if you feel you must). Direct edits are lost the next time EndNote formats the bibliography.

You can almost always get EndNote to format your citations exactly to your specifications by editing the style, the EndNote reference, or the citation (as described here).

Note: An easy way to omit the Author or Date from an individual citation is to select the citation, right-click with your mouse, choose *Edit Citation(s)* and then *Exclude Author* or *Exclude Year*.

To safely edit a formatted citation:

1. Click on the citation you wish to change.
2. **Word 2003** : From Word's *Tools* menu, go to the *EndNote X4* submenu and *Edit Citation(s)* to display the EndNote Edit Citation dialog.

   Word 2007 and 2010 : On the EndNote tab, in the Citations group, click *Edit Citation(s)* .

   All of the cited references in the document are listed in the left column of the dialog. An ellipses shows where a citation appears within text. The line below shows the cited reference(s).
3. Select the appropriate citation from the list at the left of the dialog (you can scroll through all citations in the document) and make any of the following changes to the highlighted citation:

   Exclude Author: Select this to omit the author name from the formatted citation.

   Exclude Year: Select this to omit the date from the formatted citation.

   Prefix: Enter text here to print immediately before the citation text (spaces are significant).

   Suffix: Enter text here to print after the citation text (spaces are significant).

   Pages: Enter page numbers here to print as Cited Pages. To print, the Cited Pages field must be listed in the citation template or footnote template of the output style.
4. You can add or remove citations from a multiple citation, or change the order of citations.

   Insert: Use this to add another citation within the same set of delimiters.

   Remove: Highlight a citation and click *Remove* to delete it from the in-text citation.

   Up and Down Arrows: Highlight a reference and use the arrows to change the order of display. (If a

Citation Sort Order is applied by the current output style, using this dialog to change the order of citations in a multiple citation has no effect.)

5. Click *OK* to implement your change(s).

After making changes :

Word 2003: Choose *Format Bibliography* to (re)format the new or modified citations and regenerate the bibliography.

Word 2007 and 2010: On the EndNote tab, in the Bibliography group, click *Update Citations and Bibliography* or click the corner arrow to change bibliography preferences and Format Bibliography.

Unformatting Citations (Microsoft Word)

Unformatting reverts formatted citations to temporary citations, removes the bibliography, and turns off instant formatting.

If your citations are formatted in a numbered style, you can unformat your paper to easily identify citations as you work. You can Format Bibliography again later.

Note: Unlike formatted citations, *un*formatted citations require that you have the corresponding EndNote library open in order to format the paper again. Unformatting removes the Traveling Library.

To unformat citations:

1. Determine which citations you want to unformat:

   To unformat a particular citation, highlight only that citation.

   If the citation you want to unformat is part of a multiple citation, highlight the multiple citation. All citations within the delimiters will be unformatted.

   To unformat a section of the document, highlight that section.

   To unformat the entire document, either select nothing or highlight the entire document.

2. **Word 2003** : From Word's Tools menu, go to the EndNote X4 submenu and *Unformat Citation(s)*.

Word 2007 and 2010 : On the EndNote tab, in the Bibliography group, click *Convert Citations and Bibliography* and select *Convert to Unformatted Citations* .

If you are unformatting the entire document, this unformats all of the in-text citations and removes the current bibliography.

You can tell when a paper is unformatted because the citations appear in the temporary citation format (such as "{Smith, 1999 #25}").

Unformatted citations are temporary placeholders that do not reflect final output. You can format the paper again at any time. To save the formatted paper as text, see Removing Field Codes.

Note: When you unformat citations, Instant Formatting is disabled. To format your paper : **Word 2003** : Go to the *Tools* menu, then the *EndNote X4* submenu, and choose *Format Bibliography*. **Word 2007 and 2010** : On the EndNote tab, in the Bibliography group, click the corner arrow. From the Format Bibliography dialog, you can enable Instant Formatting again on the Instant Formatting tab.

Moving or Copying Citations (Microsoft Word)

You can highlight any text that includes citations, then use the Clipboard commands to *Cut* or *Copy* and then *Paste* it elsewhere in the document. You can do this with formatted or temporary (unformatted) citations.

To move or copy only the citation itself, make sure you highlight the entire citation (including surrounding delimiters). Then *Cut* or *Copy* and *Paste* it elsewhere in the document.

Deleting Citations (Microsoft Word)

To delete an unformatted citation, simply highlight the entire citation (including delimiters), and press the *Backspace* or *Delete* key.

While it is possible to highlight a formatted citation and simply press the delete key on your keyboard, we do not recommend that you do that. If you do not completely delete the citation and all associated codes, you could corrupt your document.

To safely delete a formatted citation:

1. In Word, highlight the citation you want to delete.
2. **Word 2003** : From the Tools menu in Word, go to the *EndNote X4* submenu and select *Edit & Manage Citation(s)* to display the EndNote X4 Edit & Manage Citations dialog.

   Word 2007 and 2010 : On the EndNote tab, in the Citations group, click *Edit & Manage Citation(s)* .

   All of the cited references in the document are listed in the field box of the dialog. The citation you highlighted in the document should be highlighted in the list.
3. In the Edit & Manage Citations dialog, ensure that the citation you want to delete is highlighted.

   If the citation is part of a multiple citation, make sure you select just the citation you want to delete.
4. Click *Remove Citation* from the Edit Reference menu.
5. Click *OK*.

Generating Bibliographies

Generating Bibliographies (Microsoft Word)

Formatting a bibliography serves two functions:

It formats each in-text citation according to the selected bibliographic style.

It adds a complete bibliography to the document (unless you override this with a setting in the output style).

The format used for citations and references is determined by the output style selected.

When you have finished writing your paper in Word, and all of your EndNote citations have been inserted into the text, you are ready for EndNote to format the paper and generate a bibliography. This can be done in one of these ways:

Instant Formatting actually works as you insert citations, and is enabled when you first start using Cite While You Write. EndNote uses the currently selected style to format citations and update the bibliography each time a citation is inserted. However, if you want to change the style or layout of references, you can use the *Format Bibliography* command.

Format Bibliography allows you to modify bibliography preferences such as style and layout before formatting your document. This is also where you enable or disable Instant Formatting.
Word 2003 *:* From the *EndNote* X4 submenu on the *Tools* menu, select *Format Bibliography*.
Word 2007and 2010 : On the EndNote tab, in the Bibliography group, click the bottom corner arrow.

Update Citations and Bibliography is available in Word 2007. You will find it on the Tools menu on the Edit & Manage Citation dialog. EndNote uses the currently selected style to format citations, the bibliography, plus figures and tables. You could also simply choose a new style from the Style list in the Bibliography group.

These are the basic formatting instructions:

1. **Word 2003** : From the Tools menu in Word, go to the *EndNote X4* submenu and select *Format Bibliography*.

   Word 2007 and 2010 : On the EndNote tab, in the Bibliography group, click the bottom corner arrow.

2. On the Format Bibliography tab, use the *With output style* option to select an output style to format references. It is okay to experiment with different styles because you can simply reformat again.

3. Click *OK* to format all citations and build the bibliography.

Instant Formatting (Microsoft Word)

Instant Formatting works while you write your paper. As you insert citations, EndNote uses the currently selected style to format citations and update the bibliography. By default, Instant Formatting is enabled the first time you use the *Tools>EndNote X4* menu in Word 2003, or the EndNote tab in Word 2007 and 2010, to insert a citation or format the bibliography.

To change the style or layout of references, or to change Instant Formatting settings, you can use the *Format Bibliography* command, which is described in the next section.

In some cases, Instant Formatting is disabled, such as when you unformat your paper.

Even when Instant Formatting is enabled, it is not triggered when you manually type a reference into a document. You must use the *Tools>EndNote X4* menu in Word 2003, or the EndNote tab in Word 2007, to either insert another citation or format the citations and a reference list.

To use Instant Formatting in Word 2007, smart tags must be enabled (they are turned on by default).

To verify that Smart Tags are enabled:

> **Word 2007 and 2010**: Click the Office icon, then *Word Options*, then *Proofing*, then *AutoCorrect Options*. On the Smart Tags tab, select the check box titled "Label text with smart tags" and make sure "In-text Citation (Cwyw Citation Recognizer)" is selected.

To enable or disable Instant Formatting in the current document:

1. **Word 2003** : From the Tools menu in Word, go to the EndNote X4 submenu and select *Format Bibliography*.

   Word 2007 and 2010 : On the EndNote tab, in the Bibliography group, click the bottom corner arrow.

2. Click the Instant Formatting tab.

3. Click *Turn On* or *Turn Off* to toggle Instant Formatting.

   When enabled, you can click the *Settings* button to change these Instant Formatting controls:

   > **Scan for temporary citations** turns on scanning of temporary citations. This finds and formats all citations, including those you may have entered manually. You can select how often EndNote scans your document.
   >
   > **Check for citation changes** turns on background scanning that looks for citation changes.

   Click *OK* to save changes to the Instant Formatting settings.

4. Click *OK* to format all citations and build the bibliography.

When Instant Formatting is enabled, leaving the Format Bibliography dialog—whether you click *OK* or *Cancel*—will always trigger formatting in your document.

Note: To turn Instant Formatting on or off for *new* Word documents, see General Preferences.

Formatting the Bibliography and/or Changing Bibliography Settings (Microsoft Word)

You may be halfway through inserting citations, or you may have finished writing your paper. You may have instant formatting enabled, or you may have manually inserted citations with formatting disabled. It does no t matter. As long as you have citations entered in your document, you can format your paper at any time. You can reformat after adding more citations or to change the style or layout settings.

Note: The first time a citation is formatted, the corresponding EndNote library must be open. After that, EndNote can use the Traveling Library for reference information.

To format citations and generate a bibliography:

1. **Word 2003** : From the Tools menu in Word, go to the *EndNote X4* submenu and select *Format Bibliography*.

   Word 2007and 2010 : On the EndNote tab, in the Bibliography group, click the bottom corner arrow.

2. On the Format Bibliography tab, change or verify these settings:

   Format document: Make sure the appropriate Word document is selected from the list of open Word documents.

   With output style: Select the appropriate output style to format references. You can experiment by reformatting with various output styles. To add more output styles to the list, see Adding Styles to the Output Styles List.

   Temporary citation delimiters: These are the opening and closing delimiters for temporary citations. Make sure they are unique delimiters, and not characters you would normally use in your paper. The defaults are curly braces.

3. On the Layout tab, change or verify these settings:

   Font and Size: These are the text font and size used for the bibliography.

   Bibliography title: To print a title at the top of your bibliography, type the title in this text box.

   Text Format: Highlight the bibliography title text and then use the *Text Format* button to display a dialog where you can change the format of the highlighted text.

   Start with bibliography number: Enter a starting reference number if you want to number your bibliography.

   First line indent and **Hanging indent**: Use these settings to set a paragraph indent, a hanging indent, or no indent at all. The hanging indent applies to the second and subsequent lines of a reference in the bibliography. Type measurements as centimeters (cm), inches (in), lines (li), or points (pt).

   Line spacing and **Space after**: Set the Line spacing for within a reference and the Space after for spacing between references.

4. On the Instant Formatting tab, you can *Turn On* or *Turn Off* Instant Formatting. See Instant Formatting.

5. Click the Libraries Used tab to see which libraries are referenced in the document. This tab lists the name of the library or libraries that were used for the formatted citations within the document. If your document is unformatted, the list is empty.

6. Click *OK* to save changes and format your citations and bibliography.

Note: You do not have to verify each tab every time you format. If all you want to do is change the output style, choose *Format Bibliography*, select the output style on the Format Bibliography tab, and click *OK*. **Word 2007 and 2010** : An easier option is to go to the EndNote tab, look in the Bibliography group, and simply select a new Style.

Adding Styles to the Output Styles List

The bibliographic style selected on the *Format Bibliography* dialog determines how EndNote formats the citations in your paper and the references in the bibliography. The style takes care of text styles, punctuation, and sorting required for the citations and bibliography, as well as which fields are included in the bibliography.

You can use Format Bibliography to select a different style and reformat your document at any point.

For a typical installation, only the 100 most popular output styles are initially installed with EndNote. If you want to install more of the 4,500 + styles that are available, see Installing Additional Output Styles.

To mark an installed output style as a favorite so it will appear in the *Output Style* list:

1. In EndNote, go to the Edit menu, choose *Output Styles,* and then select *Open Style Manager.*
2. Find the style that you need.

- You can quickly select a style by typing its name, or scroll through the list to find what you need.
- Click on the column headings to sort the styles by either name or category. Click a second time to reverse the sort order.
- Use the *Find by* button in the Style Manager window to find entire categories of styles or to search for a style by a word in its name. For example, click the *Find by* button and choose *Chemistry* to display all of the styles in the category "Chemistry."

  The *Style Info* item in the information panel can be changed from *Style Info* to *Style Preview* to display a preview of how the selected style formats EndNote's sample references.

3. Click in the column box to the left of the style's name to choose it as one of your favorites. Or, to mark all of the styles that are displayed, perhaps a whole category, click *Mark All.*
4. Close the Style Manager by clicking the close button or choosing *Close Style Manager* from the File menu.

Styles marked as favorites appear in the Output Styles list of EndNote's Edit menu as well as the styles list in Microsoft Word and OpenOffice.org Writer .

All styles can be modified to meet your specifications. You can also create completely new styles if necessary. See Modifying Style Templates for instructions about creating and modifying styles.

Reformatting Papers (Microsoft Word)

Adding New Citations to Formatted Papers

If you add more citations to your paper after the formatting process, you can update the citations and the bibliography by simply choosing the *Format Bibliography* command again. **Word 2007 and 2010** : Click *Update Citations and Bibliography* or click the corner arrow to bring up the Format Bibliography dialog.

Note: You do not need to unformat your citations in order to reformat them.

Reformatting with Different Styles

To reformat your paper in a different style:

1. **Word 2003** : Go to the Tools menu, then the EndNote X4 submenu, and choose *Format Bibliography* again.

   Word 2007 and 2010 : You can select a new Style in the Bibliography group, or click the corner arrow to bring up the Format Bibliography dialog.

2. Select a new style from the Format Bibliography dialog and click *OK*.

Your citations and bibliography are updated for the new bibliographic style. See Adding Styles to the Output Styles List for information about expanding the list of available styles.

Creating a Bibliography from Multiple Documents (Microsoft Word)

You can use Word's Master Document feature to generate a single bibliography from multiple documents. This allows you to create a cumulative bibliography from any number of book chapters. (As an alternative, we recommend using a single Word document split into Sections. See Creating Multiple Bibliographies in a Single Document.)

To generate a single bibliography:

1. In each of your documents, or chapters, insert your citations to link them to references in an EndNote library.
2. **Word 2003** : In each document, go to the Tools menu, then the *EndNote X4* submenu, and choose *Unformat Citations* to unformat all of the citations in the document.

   Word 2007 and 2010 : On the EndNote tab, in the Bibliography group, click *Convert Citations and Bibliography* and choose *Convert to Unformatted Citations* .
3. *Close* all of your documents.
4. Create a *New* document.
5. Use the *Outline* view to designate the new document as a master document, then insert and display each of your chapters as subdocuments. (Check Word's documentation if you need step-by-step instructions.)

Note: If you have collapsed subdocuments to hide their content in Outline view, make sure you expand them in order to display the contents of all subdocuments before continuing.

6. **Word 2003** : From the *Tools* menu, go to the *EndNote X4* submenu and select *Format Bibliography*.

   Word 2007and 2010 : On the EndNote tab, in the Bibliography group, click the bottom corner arrow.

Note: Your documents must allow read/write access; they cannot be designated *Read-only* (locked).

7. Verify the formatting options and click *OK*.

EndNote creates the bibliography, using citations from the master document and all displayed subdocuments, and places it at the end of the master document. You can move the bibliography anywhere within the master or subdocuments, and it will remain in that location even when you reformat.

Note: If you choose Word's *Insert* > *File* command and select the "Link" option to insert a document into the text, EndNote will *not* format the linked document when you format the main document. The text from the linked document will be skipped.

If you want to format a bibliography for each subdocument plus a cumulative bibliography at the end of the master document, follow the instructions above, but use an output style that allows formatting of Sections. See the description about Creating Multiple Bibliographies in a Single Document and Sections for additional information. In the case of a master document, subdocuments are treated as sections.

Creating Multiple Bibliographies in a Single Document (Microsoft Word)

By default, EndNote creates a single bibliography at the end of each of your Word documents. However, you may want to create a separate bibliography for each section (or chapter) in your document. Output style options are available so that you can choose to:

Create a single, complete bibliography at the end of the document (the default setting for almost all of the supplied output styles).

Create a bibliography for each section in the document.

Create a bibliography for each section and also a complete bibliography at the end of the document.

Note: These options are ignored by versions of EndNote prior to version X4.

In Microsoft Word, break your document into sections

EndNote can format each section individually. You may want to break each chapter into its own section. (In the case of a master document, subdocuments are treated as sections.)

In Microsoft Word 2003:

From the *Insert* menu, choose *Breaks*, and then select one of the four options under Section break types: *Next Page*, *Continuous*, *Even Page*, or *Odd Page*.

In Microsoft Word 2007 and 2010:

On the Page Layout tab, click on *Breaks*, and then choose one of the four options under Section Breaks: *Next Page*, *Continuous*, *Even Page*, or *Odd Page*.

Note: If you need additional information about section breaks, please see your Microsoft Word documentation.

Modify the output style as needed

If you want to use a predefined style that formats sections, try *APA 5th (sections)* or *Chicago 15th B (sections)*. These styles are already defined to format a bibliography for each section, and do not require modification.

Otherwise, we recommend that you start by copying an existing output style and giving it a unique name. This leaves the original style intact. See Copying Styles.

Next, click on the Sections panel in the output style. This is where you select the appropriate option for creating a single bibliography from all sections, a separate bibliography for each section individually, or both. For a complete description of the formatting options for Microsoft Word sections, see Sections.

Save your changes and close the output style.

Format your Word document with the new output style

Format your bibliography as you normally would, but make sure you first select the new output style that you created. See Formatting the Bibliography and/or Changing Bibliography in Word.

Again, you can use the predefined styles *APA 5th (sections)* or *Chicago 15th B (sections)*. These styles are already defined to format a bibliography for each section.

Additional Formatting Notes

When working with sections in Word, please note that:

- EndNote will always insert a blank line between the final text of each section and the reference list for that section.
- When you format a reference list at the end of each section, the bibliography title will be used from the Layout tab of Format Bibliography. If you do not want a title for each section bibliography, make sure the Bibliography Title text box on the Layout tab is empty. See Formatting the Bibliography and/or Changing Bibliography in Word.
- If you have instructed the output style to “Create a bibliography for each section and a complete bibliography at the end of the document," but you have only one section in the Word document, a complete bibliography will appear twice — once for the end of the section, and once as a complete bibliography for the entire document.
- If you have multiple sections in your Word document, and switch from formatting with a style that formats sections individually to a style that formats a single, cumulative bibliography...you will see the section bibliographies disappear! If you want them back, make sure to format with a style that formats sections individually.

Directly Editing Bibliographies (Microsoft Word)

It is always best to make changes to your final bibliography by correcting the data in the EndNote library, editing the output style you are using, or adding or deleting citations from your paper. Then, after making the necessary changes, format the bibliography to automatically make the corrections.

It is not always possible for EndNote to format the bibliography exactly as needed, so you might need to manually edit the formatted bibliography. If you must do this, remember that if you reformat a paper *after* editing the bibliography, EndNote will *not* preserve your edits. When EndNote reformats a bibliography, it deletes the existing one and puts a new one in its place.

You can edit the bibliography as you would any text. The bibliography may be shaded, but you can still edit it. If you later reformat the paper, your edits will be gone.

You can add text *after* the bibliography, but make sure to put it after the end of the formatted bibliography—outside of the bibliography field.

Note: See Modifying Style Templates for instructions about editing styles.

Moving Bibliographies (Microsoft Word)

Cite While You Write always creates the initial bibliography at the end of the Word document that it has formatted. If you move the bibliography to a different location in the document, EndNote keeps it there even if you reformat the paper. You can drag-and-drop the bibliography, or, if Instant Formatting is disabled, you can Cut and Paste the bibliography.

Note: When Instant Formatting is enabled, use drag-and-drop to move a bibliography. If you try to use *Cut* and *Paste*, Instant Formatting will create a new bibliography at the end of the document before you have a chance to Paste.

Deleting Bibliographies (Microsoft Word)

To delete a bibliography, make sure Instant Formatting is disabled, select the bibliography, and then delete it.

Make sure you drag the cursor across the very beginning of the bibliography to select the entire bibliography field. Press the Backspace or Delete key. You can also *Cut* the bibliography if you want to paste it somewhere else.

Inserting and Formatting Figures and Tables

Inserting and Formatting Figures and Tables (Microsoft Word)

Once images are organized in an EndNote library, they are available for inserting into a manuscript with Cite While You Write commands. The finishing touch is the automatic creation of a figure list and/or a table list that presents a sequential list of all graphics inserted in a manuscript.

A figure citation is a brief numbered citation in the body of a paper that refers the reader to a figure at the end of the paragraph or to a figure in a complete list of figures at the end of the paper.

In-text figure citations are sequentially numbered and formatted like this:

> *Marrella splendens* is a small "arthropod" somewhat reminiscent of a trilobite. This illustration also shows the dark "blob" produced by body contents which were squeezed out of the animal after burial. (Figure 1)

It includes the word "Figure" (or "Table"), the sequential number, and surrounding parentheses. The field may be shaded by Word to help you see citations, but shading does not print. You can turn field shading off in Word.

The current output style determines the placement of formatted figures and tables. They appear either within the body of the paper, directly after the paragraph where they are cited, or in a list at the end of the document, after the bibliography.

See Finding and Inserting Figures and Tables.

Notes About Formatting Figures and Tables (Microsoft Word)

Do not use Microsoft Word Captioning in conjunction with EndNote figure captioning or in-text citations.

Images found in the *Chart/Table* reference type are inserted into word as tables, which are labeled and numbered separately from figures. (You still use the generic *Find Figure* and *Generate Figure List* commands.)

If you open an existing document that already has figure citations in the body (that were not inserted with EndNote's *Find Figure* command), those figures will not be included in the figure list. You will need to add the existing figures to references in EndNote, and then use the *Find Figure* command to insert them into the document.

You can format figures either directly after the paragraph in which they are cited, or in a list at the end of the document. See Figures and Tables in Word.

The Instant Formatting that applies to bibliographies does not apply to figures. In-text figure citations are always formatted as you insert them, but if you move or delete a figure citation in your paper, you must manually select *Generate Figure List* from the Tools menu to update the document. **Word 2007 and 2010** : On the EndNote tab, in the Bibliography group, choose *Update Citations and Bibliography* .

Figure and table captions are added from the Caption field in the EndNote reference.

If more than one in-text figure citation references the same figure with the same caption, those citations are assigned the same figure number, and the figure appears only once in a figure list.

You can manually insert a page break between figures if you prefer each figure on a separate page. These page breaks will be remembered if you choose *Generate Figure List (or Update Citations and Bibliography* in Word 2007 and 2010) again.

Finding and Inserting Figures and Tables (Microsoft Word)

You can search EndNote references and insert a graphic or file from the figure field of a reference into your Word document. The figure field in your references may be titled figure or have a custom name assigned by you.

Note: The file types accepted are dependent on your version of Word and other software installed on your computer. For example, some versions of Word will not accept PDF files.

To insert a graphic or file that is stored in an EndNote reference:

1. Open the EndNote library that contains the figure you wish to insert.
2. In the Word document, position the cursor at the location where you would like the figure citation to appear.
3. **Word 2003** : From Word's *Tools* menu, select the *EndNote X4* submenu and *Find Figure(s)* to display the EndNote Find Figures dialog.

   Word 2007and 2010 : On the EndNote tab, in the Citations group, click *Insert Citation* and then *Find Figure* .
4. In the text box at the top, enter text to identify the reference that contains the figure. EndNote assumes an "and" between each word, and will search all fields in your records, including the Caption field.

5. Click *Find*, and EndNote compares the text to text in your EndNote references and lists each matching reference that contains an image.

   EndNote displays the Author, Year, Title, and Caption field from each matching reference. Drag the vertical bars between the column titles to display more or less of a field. The Caption field should contain a description of the figure.

6. Identify, highlight, and *Insert* the appropriate figure.

   If no references match your text, you need to modify your search text and click *Find* again.

EndNote places an in-text figure citation at the cursor location and inserts and labels the figure itself.

Note: Images found in the *Chart/Table* reference type are inserted into word as tables, which are labeled and numbered separately from figures.

The figure or table number represents the order of the image in the document.

EndNote inserts the image itself, along with the caption, immediately after the paragraph that cites it. You can modify the output style to place figures and tables in lists at the end of the document, after the bibliography. See Figures and Tables.

You can insert figures and tables in an existing manuscript or as you write. Remember to *Save* your document as you work.

Note: The Instant Formatting that applies to bibliographies does not apply to figures. In-text figure citations are always formatted as you insert them, but if you move or delete a figure citation in your paper, you must manually select *Generate Figure List* from the Tools menu to update the document. **Word 2007 and 2010** : On the EndNote tab, in the Bibliography group, choose *Update Citations and Bibliography* .

Updating Figures and Tables (Microsoft Word)

In-text figure citations are always formatted as you insert them. By default, they appear directly after the paragraph in which they are cited. However, you can direct the output style to format tables and figures in lists at the end of the document.

If you move or delete a figure citation in your paper, you must manually generate the figure list to update the figure citation numbering and placement.

Word 2003 : From Word's *Tools* menu, select the EndNote X4 submenu and choose *Generate Figure List*. Or, click the *Generate Figure List* button on the CWYW toolbar.

Word 2007 and 2010 : On the EndNote tab, in the Bibliography group, choose *Update Citations and Bibliography* .

EndNote will number each figure and table citation sequentially in the Word document, as shown in this example:

> This family tree is not a chronological progression. Rather, it illustrates how evolution incorporates traits that evolved for unrelated reasons into a novel structure. (Table 1)
>
> *Marella splendens* is a small "arthropod" somewhat reminiscent of a trilobite. This illustration also shows the dark "blob" produced by body contents which were squeezed out of the animal after burial. (Figure 1)
>
> As researchers look at evidence, even the crest on the modern Cockatiel provides insight into the evolution of feathers. (Figure 2)

EndNote also inserts and displays the actual figures (graphics, figures, tables, charts, equations, or files) and labels them with figure or table numbers (to match each in-text reference) and Caption text (up to 245 characters from the Caption field in the EndNote reference).

If your figures are listed at the end of the document:

In a figure or table list, if more than one citation references the same figure with the same caption, those citations are assigned the same figure number, and the figure appears only once in the list.

You can continue to add figure citations to the Word document. If you change the position of figure citations in your document (with the *Copy* and *Paste* commands), choose *Generate Figure List* again to update figure numbers and the corresponding figures. **Word 2007 and 2010** : On the EndNote tab, in the Bibliography group, choose *Update Citations and Bibliography* to update figures and tables.

You can manually insert a page break between figures if you prefer each figure on a separate page. These page breaks will be remembered if you generate the figure list again. Or, direct the output style to always insert page breaks between figures.

Placing Figures and Tables (Microsoft Word)

Figures and tables are formatted either after the paragraph where cited or in a list at the end of the manuscript. This placement is determined by the current output style.

Note: Images from any reference type other than Chart/Table are inserted and formatted as Figures. Images from the Chart/Table reference type are inserted and formatted as Tables. Both are inserted with the *Find Figure* command. Both are formatted with *Generate Figure List* (in Word 2007, use *Update Citations and Bibliography*) .

Automatic Placement by the Output Style

The selected output style determines where figures and tables are initially placed in a document and when you *Generate Figure List* or *Update Citations and Bibliography*.

By default, output styles are set up to place figures and tables immediately after the paragraph in which they are cited. You can edit individual output styles to place figures and tables either after the paragraph in which they are cited or in a list at the end of the document.

For information about editing your output style for figure placement, see Figures and Tables. The Figures panel determines the placement of figures and their captions, the Tables panel determines the placement of tables (images from the Chart/Table reference type) and their captions, and the Separation and Punctuation panel determines image separation and punctuation of labels and captions.

Selecting a Different Output Style

To apply a different output style in Word:

Word 2003: From the Tools menu, choose *EndNote X4* and then *Format Bibliography*.

Word 2007 and 2010: On the EndNote tab, in the Bibliography group, you can directly choose a different style, or click the bottom corner arrow.

Select an output style on the Format Bibliography tab and click *OK*. You can select a different output style even if you have no bibliographic citations in your paper. If you *do* have bibliographic citations, remember that your output style choice affects both bibliographic citations *and* figure and table citations.

Cite While You Write Override of the Output Style

As you work in your document, you may adjust the placement of actual figures and tables by cutting the pictures and pasting them elsewhere in the document. Normally, when the figure list is generated again, the output style puts them back in their initial location! You can override the output style, and tell EndNote to leave existing figures and tables where they are currently placed. See Figures and Tables in Word for information about Cite While You Write preferences that affect Figures and Tables.

Moving Figures and Tables (Microsoft Word)

Moving In-text Figure and Table Citations

To move or copy a figure or table citation:

1. Highlight the entire citation, including the surrounding parentheses. For example:

   (Figure 1)

2. Use *Copy* or *Cut* from the Edit menu to copy or move the citation to the Clipboard. **Word 2007 and 2010** : These commands are found in a Clipboard group. You could also use drag-and-drop to move a figure citation.

3. Move the cursor to the new location.

4. From the Edit menu, *Paste* the Clipboard contents at the new location.

5. **Word 2003** : From the Tools>EndNote X4 menu, select *Generate Figure List* to renumber the in-text citations and update figures and tables.

   Word 2007 and 2010 : On the EndNote tab, in the Bibliography group, select *Update Citations and Bibliography* .

The selected output style determines whether figures and tables appear directly after the paragraph where cited or in a list at the end of the document. To modify this section of your output style, see Figures and Tables.

Moving Individual Figures and Tables

To move an individual figure or table within the text of the manuscript:

1. *Cut* the figure (or table), including the label and caption, and *Paste* it in the appropriate position in your manuscript.
2. **Word 2003** : In Word, go to the Tools menu and select *EndNote X4 >Cite While You Write Preferences*.

   Word 2007 and 2010 : On the EndNote tab, in the Tools group, select *Preferences* .
3. On the Figures and Tables tab, select the bottom button for custom placement of figures and tables and click *OK*.
4. **Word 2003** : From the Tools menu, select *EndNote X4 >Generate Figure List*.

   Word 2007 and 2010 : On the EndNote tab, in the Bibliography group, select *Update Citations and Bibliography* .

EndNote will update figure and table numbering, but will not change the position of existing figures and tables.

Note: This custom placement is honored only when the current output style is set up to print figures and tables within the text of the manuscript. When the output style is set up to list figures and tables in lists at the end of the document, regenerating the figure list will move figures and tables to the appropriate list at the end of the document.

Moving Figure and Table Lists

When an output style is modified to print figures and tables in a list at the end of a document, the lists appear after the bibliography. However, you may want the list to appear elsewhere in your document. Some publishers even require that figures be provided in a separate file.

To move a figure or table list elsewhere in your document, such as *before* the bibliography:

1. Highlight the entire list, especially the very beginning of the list which contains a hidden marker.
2. *Cut* the list to move it to the Clipboard.

3. Move the cursor to the new location.
4. *Paste* the Clipboard contents at the new location.

Each time you choose *Generate Figure List* (or *Update Citations and Bibliography* in Word 2007 and 2010) , EndNote looks for the beginning marker, so the list will be updated in its current location.

If multiple in-text figure citations reference the same figure with the same caption, those citations are assigned the same figure number, and the figure appears only once in a figure list.

To provide a figure or table list in a separate file:

1. Finalize your manuscript and figure list.
2. Highlight the entire list, and then use the *Copy* and *Paste* commands to paste the list into another Word document.
3. Delete the figure or table list from the manuscript file.

Note: Do not choose *Generate Figure List* or *Update Citations and Bibliography* again within either document.

Deleting a Figure Citation or Figure List (Microsoft Word)

To delete a figure or table citation:

1. Highlight the entire citation, including the surrounding parentheses.
2. Press Backspace or Delete.
3. **Word 2003** : From the *Tools>EndNote X4* menu, select *Generate Figure List* to renumber the remaining in-text figure and table citations and update the formatted figures and tables.

   Word 2007and 2010 : On the EndNote tab, in the Bibliography group, select *Update Citations and Bibliography* .

To delete a figure or table list:

To remove a single figure or table from the list, delete the corresponding in-text figure citation. Then, use *Generate Figure List* to generate an updated list at the end of the document. **Word 2007 and 2010** : On the EndNote tab, in the Bibliography group, select *Update Citations and Bibliography* .

If you want to completely remove the figure or table list, first delete all in-text figure citations and update the list with *Generate Figure List* or *Update Citations and Bibliography* . Then, to completely remove any mention of a figure or table list, highlight the List of Figures marker or List of Tables marker and press Delete.

Note: Do not delete the figure (picture) itself from the document. Remove the in-text figure citation and then *Generate Figure List* or *Update Citations and Bibliography* . If you do not remove the in-text citation, regenerating the figure list will use the in-text citation to display the picture again!

Figure and Table Preferences (Microsoft Word)

For information about output style settings that affect the placement of figures and tables, see Figures and Tables.

For information about Cite While You Write preferences that override output style settings for figures and tables, see Figures and Tables in Word.

Setting Cite While You Write Preferences

Setting Cite While You Write Preferences (Microsoft Word)

You can access and set Cite While You Write preferences from either EndNote or Word. The same dialog appears, and changes are saved in the same place:

From EndNote's Tools menu, go to the *Cite While You Write* submenu and select *CWYW Preferences*.

Word 2003 : From Word's Tools menu, go to the *EndNote* submenu and select *CWYW Preferences.*

Word 2007 and 2010: On the EndNote tab, in the Tools group, select *Preferences*.

Cite While You Write preferences include general preferences, the ability to assign keyboard shortcuts to menu commands, and the ability to control placement of figures.

For information about other EndNote preferences that directly affect Cite While You Write, see Related EndNote Preferences.

Making Changes to the EndNote Library

Finding Cited References in a Library (Microsoft Word)

You can quickly jump from a bibliographic in-text citation (not a figure citation) to the corresponding EndNote reference.

To find an EndNote reference:

1. Make sure both your Word document and your EndNote library are open.
2. Highlight the citation(s) in your Word document.
3. **Word 2003** : From the Tools menu in Word, go to the EndNote X4 submenu and select *Edit Library Reference(s)*.

   Word 2007and 2010 : On the EndNote tab, in the Citations group, select *Edit Library Reference(s)* .

EndNote opens the corresponding reference for editing.

Editing a Reference in the Library (Microsoft Word)

You may insert a citation in a Word document, and then later edit the corresponding reference in EndNote. Are those changes reflected in your Word document?

Your citations and bibliography will reflect the edits the next time you reformat the paper with the EndNote library open. Open your document, open your EndNote library, and choose *Format Bibliography* from the *EndNote X4* submenu on the Tools menu in Word. **Word 2007** : On the EndNote tab, in the Bibliography group, select *Update Citations and Bibliography* .

EndNote will not be able to make the update if the library is not open during formatting. Instead, it will take the original reference information from Word's Traveling Library.

Note: The author's last name and the publication year are both used to identify a reference, so changes to these items in an EndNote reference are *not* reflected in the in-text citation. Cite While You Write will no longer identify a match between the citation and the reference, and will use reference information from Word's field codes (the traveling library).

If you make changes to a figure in an EndNote reference, you must manually replace the figure in your Word document.

Deleting a Reference From the Library

The first time a citation is formatted, EndNote uses information from the unformatted citation to look in the open library and find the corresponding reference. If you later reformat, EndNote again looks in the library for

that reference. If the reference has been deleted from the library, EndNote takes the reference information from hidden field codes in Word (the Traveling Library).

So, if you deleted a cited reference from the library, the required information is still available in the hidden field codes surrounding each *formatted* citation–even though the reference is no longer in the library.

However, an *unformatted* citation is simply a temporary placeholder. If a citation is unformatted, and you have deleted the corresponding reference from the EndNote library, EndNote will not be able to find the reference information for formatting.

If you add the reference to the library again, it will be assigned a different record number. You would need to re-insert the citation in Word.

Record Numbers

EndNote assigns a unique record number to each reference as it is added to your library. These record numbers appear in temporary citations to ensure that the correct reference is used when the paper is formatted:

{ Argus, 1991 #11}

The record number for a reference is also visible in the title bar of the Reference window.

Keep the following points about record numbers in mind:

- EndNote automatically assigns a record number sequentially to each reference as it is added to a library.
- If the same reference appears in two different libraries, the record numbers will most likely be different.
- Record numbers are never reused or reassigned within a library. When you delete a reference, the corresponding record number is never used again in that library.
- You cannot modify or reassign record numbers.
- We recommend that you *not* rely on EndNote's record numbers as a means of filing or numbering your office reprints, because *you have no control over this number*. Instead, enter your own unique number into the Label field, or any Custom field, and use that number for your reprints.

If you add the reference to the library again, it will be assigned a new, different record number, so EndNote still will not be able to find it when formatting your paper. You will need to reinsert the citation into the paper using the new reference in your library.

Sharing Your Word Documents

Sharing Your Word Documents

You can directly share your Word 2003, 2007, or Word 2010 files with colleagues. Each formatted citation is surrounded by field codes which contain full reference information (also referred to as the Traveling Library).

If you want to convert your document for use with a previous version of Word or a different word processor, you should Unformat Citations before saving in the different file format. Then, you may be able to reformat. The corresponding EndNote library (or libraries) must be available in order to format.

To send a final, formatted document to someone, you may want to Remove Field Codes to save the formatted citations and bibliography as text.

Of course, if you just want to print a copy of the paper for someone, you do not need to do anything to your document other than print it!

Note: Cite While You Write codes are directly compatible between Word 2003 and 2007.

The Traveling Library (Microsoft Word)

Each formatted citation in your Word document is saved with field codes that embed reference data in the document. The paper contains a "Traveling Library" of references cited.

The first time a citation is formatted, EndNote looks in the open library and finds the corresponding reference. If you later reformat, EndNote again looks in the open library for that reference. However, if the library is not available or not open, EndNote uses the Traveling Library for reference information.

Because reference data is kept with each formatted citation, you can collaborate with other authors on a paper without each author having the same EndNote library.

The reference data saved with each citation includes all fields except Notes, Abstract, and Figure.

Note: Do not unformat your document if you do not have the original references in your libraries. Unlike formatted citations, *un*formatted citations require that you have the corresponding EndNote libraries open in order to format references.

Exporting Word's Traveling Library to an EndNote Library

There may be occasions where you want to copy all of the references used in a Microsoft Word document to an EndNote library. Perhaps you received only the formatted Word document from a colleague, and would like to create EndNote references to use later. Or, you may have a large EndNote library, but want to create a smaller EndNote library with only the subset of references used in your paper.

Note: The Traveling Library does not contain Notes, Abstracts, Figures, or Captions.

To export references from a Word document to an EndNote library:

1. Open the document in Word.
2. **Word 2003** : From the Tools menu, go to the *EndNote X4* submenu and choose *Export Traveling Library*.

   Word 2007and 2010 : On the EndNote tab, in the Tools group, select *Export to EndNote* and then *Export Traveling Library* .
3. On the Export Traveling Library dialog, select either:

   An existing EndNote library:
   Select a library from the drop-down list of available libraries, or click *Browse* to locate a library.

   A new EndNote library:
   You will be prompted to name and *Save* the new library.

Note: We recommend that you export to a *new* EndNote library, so you can review the records before adding them to an existing library.

There is an alternate way to copy references from your Word document to an EndNote library. Open both your Word document and the EndNote library. Then, in EndNote, go to the *Tools* menu, then the *Cite While You Write* submenu, and choose *Import Traveling Library*.

Note: When you use the Export/Import Traveling Library commands, the exported references are renumbered and do not retain their original reference numbers.

Converting Word 2007 and 2010 Citations to EndNote

Word 2007and 2010 includes a Reference tab, where you can use commands to insert Microsoft Word footnote or endnote citations. These footnote and endnote citations are not used directly by EndNote's Cite While You Write feature (although you can insert an EndNote citation within a Word footnote). If you have citations already entered into Word, you can copy the reference information into an EndNote library and then convert the Word citations into EndNote Cite While You Write citations.

Note: The Word citation conversion features requires that your computer have the Microsoft .Net Framework installed.

To export Word 2007 and 2010 citations to an EndNote library:

1. Open the Word document that contains the citations.
2. On the EndNote tab, in the Tools group, select *Export to EndNote* and then *Export Word 2007 Citations*.

To export the Word 2007 and 2010 master citation list to an EndNote library:

1. Open the Word document that contains the citations.
2. On the EndNote tab, in the Tools group, select *Export to EndNote* and then *Export Word 2007 Master List*.

To convert Word 2007 and 2010 citations to EndNote citations within the document:

1. Open the Word document that contains the citations.
2. On the EndNote tab, in the Bibliography group, select *Convert Citations and Bibliography* and then *Convert Word 2007 Citations to EndNote*.

Working on Different Computers (Microsoft Word)

If you are working on a single paper and moving between different computers, it is best to keep a copy of your reference library with your paper. That way you will always access the same library when inserting citations. If you separately add references to a copy of the library at home and to a different version at work, record numbers may not match up correctly and EndNote may have to rely on the Traveling Library for reference information. That is not necessarily bad, but you want to make sure that any library edits are reflected in your Word document.

If you are inserting citations on only one machine, it is fine to move the document itself to other machines—as long as you will be accessing the document with the same version of Word.

Note: If you are collaborating with other authors, you will want to rely on the Traveling Library.

Saving Files for Other Versions of Word and Other Word Processors

Formatted citations are Word "fields" specific to the version of Word that created them and the other compatible versions (Word 2003, 2007, and 2010). If you open your document with a different version of Word, or use the *Save As* command to save a formatted copy of your paper in another format, you may lose the ability to format citations in that document.

If you plan to use your document with a different word processor, a different version of Microsoft Word, or on a Macintosh machine, you should either *Unformat Citations* or *Remove Field Codes* (*Convert to Plain Text* in Word 2007 and 2010) from the Word file before converting the document to the other file format.

Unformatting Citations: Unformatted citations are regular text; however, they are temporary placeholders that do not reflect final output. See Unformatting Citations. You may be able to unformat citations, save the document as an RTF file, and use Format Paper to format citations from these placeholders.

Removing Field Codes: When you remove field codes, you save a copy of the document and convert formatted fields to regular formatted text. Graphics are no longer linked, but are saved as though you had used the Copy and Paste commands. The copy reflects final, formatted output, but you cannot reformat later. See Removing Field Codes.

Note: Cite While You Write codes are directly compatible between Word 2003, 2007, and 2010 . Because reference data is kept with each formatted citation, you can collaborate with other authors on a paper without each author having the same EndNote library.

For information about using your Word document with OpenOffice.org Writer, see Moving Documents between Word and Writer .

Submitting the Final Paper to a Publisher (Microsoft Word)

Many publishers ask that you submit an electronic copy of your paper in addition to a printed copy. Because the field codes in your document may be incompatible with the publishing software, you may be asked to submit a copy of your paper without field codes, as described in Removing Field Codes.

Removing Field Codes (Word)

You may need to remove Cite While You Write field codes in order to share your document with a publisher or colleague.

> If your colleague is using the same version of Word that you are, you can share your formatted document as is; the document includes a Traveling Library, which includes all required information for the formatted citations and bibliography.
>
> If your colleague is using a different word processor or an incompatible version of Word, you could remove field codes to share your final document. However, removing field codes saves the formatted citations and bibliography as text, and does not allow reformatting.
>
> Removing field codes means deleting Word's Cite While You Write field codes and saving the formatted citations and bibliography as text. This removes only Cite While You Write field codes, and not all other Word field codes.
>
> When field codes are removed, in-text figure citations are no longer linked to an EndNote reference or to the figure list. In- text figure citations become plain text. Pictures in the figure list become GIF files as though they were copied and pasted into the document.
>
> Because EndNote and Cite While You Write cannot reformat or unformat your paper once field codes are removed, the *Remove Field Codes* command (*Convert to Plain Text* in Word 2007) makes a *copy* of your document without codes.

Note: If you are working with master and subdocuments in Word, the *Remove Field Codes* or *Convert to Plain Text* command warns that it will strip codes from the original documents. You should first manually save copies of the master and subdocuments, and then remove codes from the copies.

To remove field codes and save the formatted citations and bibliography as text:

1. Open your formatted Word document.

   If you are working with Master and Subdocuments, work with *copies* of your documents.

2. **Word 2003** : From the *Tools* menu, go to the *EndNote X4* submenu and select *Remove Field Codes*.

   Word 2007 : On the EndNote tab, in the Bibliography group, select *Convert Citations and Bibliography* and then *Convert to Plain Text* . A copy of the document, without field codes, appears in a new document window.

3. **Word 2003** : From the File menu, *Save* the document.

   Word 2007 : Click the Office icon and then *Save* .

4. **Single document:** In Word's Save As dialog, type a new name for this copy of your document and click *OK*.

   Master and Subdocuments: You may be advised to save a copy of the master and each subdocument.

Word saves your document without embedded formatting codes, so you can submit your paper to a publisher or share your final paper with a colleague using a different word processor (including a different version of Word).

Note: The copy does not contain Cite While You Write field codes, so you cannot reformat with Cite While You Write. To reformat, start with the original document, which retains field codes.

If you find that removing EndNote field codes produces undesired layout or other formatting changes to your document, you can remove *all* Microsoft Word field codes, which may yield better results.

To remove *all* Microsoft Word field codes:

1. First save a backup copy of your document, because this will irretrievably remove the links between your document and your EndNote libraries as well as all other Word field codes.
2. Select all text in the document by pressing Ctrl +A.
3. Press Ctrl +6 to remove *all* Microsoft Word field codes from the document (not just Cite While You Write codes!) and leave the text, citations, and bibliography as they appear.

OpenOffice.org Writer/Cite While You Write

Overview of the Cite While You Write Process (OpenOffice.org Writer)

Use Cite While You Write™ (CWYW) with OpenOffice.org version 3 Writer to easily and quickly cite references and create a paper with properly formatted citations and a bibliography. Cite While You Write gives you access to EndNote references and formatting commands with an *EndNote* menu in OpenOffice.org Writer.

You can start by inserting a citation into the document. Then, you can format the citation and a bibliography according to any one of thousands of styles.

Word Processor Compatibility (OpenOffice.org Writer)

You can Cite While You Write with OpenOffice.org version 3 Writer. OpenOffice.org Writer displays Cite While You Write commands on an *EndNote* menu.

If you use Microsoft Word as your word processor, see How to Cite While You Write with Microsoft Word.

If you use a word processor other than Microsoft Word or OpenOffice.org Writer, or an older version of these word processors, save your document as an RTF file and use Format Paper.

To create a stand-alone bibliography that is not based on the citations in a paper, see Independent Bibliographies.

Note: Only one word processor at a time should be open when inserting citations and formatting documents.

How to Cite While You Write (OpenOffice.org Writer)

The basic steps required to cite a reference and generate a bibliography with OpenOffice.org version 3 Writer are summarized below.

To Cite While You Write:

1. Open the EndNote library or libraries that contain the references you wish to cite.
2. Start OpenOffice.org Writer and open the paper you are writing.
3. When you are ready to cite a source, position the cursor in the text where you would like to put the citation.
4. In OpenOffice.org Writer, go to the *EndNote* menu and select *Find Citation(s)*.

   An EndNote Find Citations dialog appears, which shows the previous search results.

Note: If this is the first time you have used the Find Citations dialog, it may be completely blank because there are no previous search results to display.

5. In the *Find* box, enter identifying text for EndNote to locate the appropriate reference. This could be an author's last name, a year, a keyword, or any other combination of terms found in the reference.
6. Click *Search* and EndNote compares the identifying text to your EndNote references and then lists the matching reference(s).
7. Identify, highlight, and *Insert* the appropriate reference(s).
8. Go back to step 3 to insert the next citation, and continue citing references this way.

Note: Each time you insert a citation it is instantly formatted, and a bibliography is updated at the end of your document. When you are done inserting citations, your document is done!

9. If your citations are not automatically formatted, and a bibliography is not updated each time you insert a citation, go to the *EndNote* menu and select *Format Bibliography*.

A Format Bibliography dialog appears, where you can change, or simply verify, the style and layout of the bibliography. (You can *Format Bibliography* at any time in order to change the style or layout of your citations and bibliography.)

Note: The dialog lists the styles that are currently selected as your "favorites" in the Style Manager. If you need to choose a style that is not in the list, click *Browse* to locate it.

10. Click *OK*. EndNote scans your paper and, using the selected style, formats any temporary citations, reformats formatted citations, and appends a bibliography to the end of your paper.

Your paper is ready for publication!

Notes about OpenOffice.org Writer

Installing Cite While You Write Support (OpenOffice.org Writer)

EndNote's installation program installs Cite While You Write support for OpenOffice.org version 3 Writer. If you installed the OpenOffice suite *after* installing EndNote, you must either reinstall EndNote or Repair or Modify your installation. For more information, see No EndNote commands in Word or Writer.

EndNote commands appear on an *EndNote X4* menu in OpenOffice.org Writer.

Cite While You Write Commands (OpenOffice.org Writer)

When Cite While You Write is installed, several EndNote commands appear on an *EndNote* menu in OpenOffice.org Writer.

When you choose an EndNote command from the menu, the EndNote program starts (if not already running).

These are brief descriptions of the Cite While You Write commands found on the *EndNote* menu in OpenOffice.org Writer:

Find Citation(s) Search for EndNote references to select and insert as citations in your OpenOffice.org document. See Finding and Inserting Citations.

Go To EndNote Bring EndNote to the front of your screen. This command launches EndNote if it is not already running.

Format Bibliography Format (or reformat) your paper according to the rules of the selected style. The formatting process replaces the temporary citations in your paper with formatted citations, and builds a bibliography at the end of the document. See Formatting the Bibliography.

Insert Selected Citations Insert a citation for each reference currently selected in the open EndNote library. You can insert any number of consecutive in-text citations; however, attempting to insert hundreds of EndNote references at one time may cause a system slowdown or freezing. See Inserting Selected Citations.

Edit Citations Edit existing individual or multiple citations. You can omit author and/or year from citations, or add prefix or suffix text (such as page numbers) to citations. See Editing Citations.

Unformat Citation(s) Unformat a selected citation before editing it, or unformat the whole document. This removes style formatting for the selected citations, and leaves temporary citations which usually consist of the author's last name, the year, and the record number surrounded by delimiters. See Unformatting Citations.

Cite While You Write Preferences Change general Cite While You Write preferences. See Setting Cite While You Write Preferences.

Help Display help about Cite While You Write features.

You can also use the corresponding EndNote X4 toolbar in OpenOffice.org Writer for easy access. Hold your mouse pointer over an icon to view a tooltip.

Note: Several Cite While You Write commands also appear on the *Tools* menu in EndNote. To use these commands from within EndNote, you must use at least one Cite While You Write command from within OpenOffice.org Writer during the current session.

Citing Sources as You Write

Forms of Citations (OpenOffice)

A "citation" is the brief bibliographic information in the body of a paper that refers the reader to a complete reference in the bibliography. A citation typically consists of a bibliography number or the author and year in parentheses:

... of the species at hand[1].

... of the species at hand (Argus, 1991).

Citations can appear as either unformatted or formatted in your OpenOffice.org Writer document.

Unformatted (Temporary) Citations

An unformatted citation is a temporary placeholder, and does not reflect final output. It will appear when you *Unformat Citation(s)* or manually enter unformatted citations. It contains information to find a unique, corresponding EndNote reference in the currently open library.

An unformatted citation typically consists of the first author's last name, year, and the EndNote record number, with citation delimiters at each end to identify the text:

{Author, Year #Record Number}.

For example:

{ Alvarez, 1994 #8}

The unformatted citation makes it easy to identify the record cited. Even if your final goal is numeric citations, you can see meaningful information while you are working on your document.

EndNote relies on these temporary citations to determine which references to include in the bibliography.

Formatted Citations

The *Format Bibliography* command uses an output style to convert all unformatted citations into formatted citations, and reflects final output.

Formatted citations include hidden information in case you want to *Format Bibliography* again later, either after adding more citations or because you want to format in a different style.

Citations formatted in an Author-Date style might look like this:

(Alvarez 1994; Turnhouse 1987)

This is the same citation formatted in the Numbered style:

[1,2]

You can easily revert from formatted citations to unformatted citations at any time. See Unformatting Citations.

Finding and Inserting Citations (OpenOffice.org Writer)

You can search for EndNote references and insert them without ever leaving OpenOffice.org Writer.

This is the easiest way to find and insert a citation into an OpenOffice.org Writer document:

1. Open the EndNote libraries that contain the references you wish to cite.
2. Open the OpenOffice.org Writer document and position the cursor at the location where you would like the citation.
3. From the *EndNote X4* menu, choose *Find Citation(s)* to display the EndNote Find Citations dialog.
4. In the *Find* text box, enter text to identify the reference you wish to cite. EndNote assumes an "and" between each word, and will search all fields in your records.
5. Click *Search*, and EndNote compares the text to text in your EndNote references and lists the matching reference(s).
6. Identify, highlight, and *Insert* the appropriate reference(s).

   If no references match your text, you need to modify your search text and click *Search* again.

Citations are inserted directly into your paper in the same font as the surrounding text. Once a citation is inserted, it contains reference information in hidden codes.

You can insert citations in an existing manuscript or as you write. Remember to *Save* your document as you work.

To format your citations and generate a bibliography, see Formatting the Bibliography.

Inserting Selected Citations (OpenOffice.org Writer)

To insert references selected in EndNote:

1. Open the OpenOffice.org Writer document and position the cursor at the location where you would like the citation.
2. Go to the *EndNote X4* menu and choose *Go to EndNote*.
3. Highlight the desired reference(s) in your EndNote library.
4. Switch back to the OpenOffice.org Writer document.
5. From the *EndNote* menu, select *Insert Selected Citation(s)*.

Finding and Inserting from Highlighted Text (OpenOffice.org Writer)

To find and insert a citation from highlighted text:

1. As you are typing, enter text to identify the reference you wish to cite, and highlight that text.
2. From the *EndNote X4* menu, choose *Find Citation(s)* to display the EndNote Find Citations dialog.

EndNote inserts your highlighted text into the Find box. Use the Find Citation(s) dialog as described in Finding and Inserting Citations.

Using Drag-and-Drop or Copy and Paste (OpenOffice.org Writer)

You can drag selected citations from your EndNote library and drop them into your paper at the desired location for the citation.

You can also copy citations from the EndNote Library window and paste them into the document (using *Copy* from EndNote's Edit menu and then *Paste* from the OpenOffice.org clipboard).

Inserting Multiple Citations (OpenOffice.org Writer)

There are several ways to insert multiple references in one in-text citation. When formatted, they appear as one multiple citation, sorted as your bibliographic style requires:

Unformatted: {Hall, 1988 #77; Baker, 1988 #16}

Formatted: (Baker, 1988; Hall, 1988)

You can insert any number of consecutive in-text citations; however, attempting to insert hundreds of EndNote references at one time may cause a system slowdown or freezing.

Note: If one of the citations in a multiple citation is not matched during formatting, the entire citation remains unformatted.

To insert multiple citations from within OpenOffice.org Writer:

1. From the *EndNote X4* menu, select *Find Citation(s)*.
2. Enter a generic search term that will find the references you want, and click *Search*.
3. Hold down the Ctrl key while clicking on the desired references in the list (or hold down the Shift key to select a continuous range of references) in order to highlight the references.
4. Click *Insert*.

To insert multiple selected citations from EndNote:

1. In EndNote, hold down the Ctrl key while clicking on the desired references in your library (or hold down the Shift key to select a continuous range of references).
2. Switch back to the OpenOffice.org Writer document.
3. EndNote X4 menu, choose *Insert Selected Citation(s)*.

To insert multiple citations individually:

Another option is to insert citations individually, but immediately next to each other. Cite While You Write merges adjacent citations during formatting. Citations do not merge if *any* character separates them–including a space or punctuation mark.

Unformatted: {Hall,1988 #77}{Baker, 1988 #16}

Merged when Formatted: (Baker, 1988; Hall, 1988)

Note: You can add citations to an existing in-text citation, or change the order of citations within the delimiters with the Edit Citations dialog.

To insert, remove, or edit citations within an existing in-text citation:

1. Click on the formatted citation.
2. In OpenOffice.org Writer, go to the *EndNote X4* menu and then *Edit Citation(s)* to display the EndNote Edit Citation dialog.

All of the cited references in the document are listed in the left column of the dialog. An ellipses shows where a citation appears within text. The line below shows the cited reference(s).

3. Highlight a citation, and then:

   Click *Remove* to delete it.

   Click *Insert* to insert another citation within the same set of delimiters.

   Use the arrow buttons to change the order of the citation in a multiple citation. (If a Citation Sort Order is applied by the current output style, changing the order of citations in a multiple citation has no effect.)

You can use the other features on this dialog as described in Customizing Individual Citations.

Inserting From Multiple Libraries (OpenOffice.org Writer)

You can cite references from multiple libraries. Simply open the selected libraries before you begin inserting citations.

If possible, though, we recommend that you use a single library when writing a paper. Keeping all of your references in one library simplifies the writing process because you know exactly where to find each reference, there is little likelihood of duplicate references, and you only need to have one library open when inserting citations.

Note: If you plan to insert citations from more than one library into a paper, read about the Merge Duplicates in Bibliography preference

Customizing Individual Citations (OpenOffice.org Writer)

There may be cases where you want individual citations to differ from the standard format. You may want to remove the year or author from a citation if either was mentioned in the context of the sentence. Or, you might want to add a page reference or comment before or after the citation.

For example, assume a formatted citation looks like this:

Hall’s discovery (Hall, 1988)

You can omit the author’s name from the citation:

Hall’s discovery (1988)

You can omit the date from the citation:

the 1988 discovery (Hall)

You can add a suffix with page number to the citation:

the discovery (Hall, 1988 p.4)

You can add a prefix to the citation:

the discovery (see Hall, 1988)

To customize a formatted citation:

1. Insert and format the citation.
2. Click on the formatted citation.

3. From the *EndNote* menu, select *Edit Citation(s)* to display the EndNote Edit Citation dialog.

   All of the cited references in the document are listed in the left column of the dialog. An ellipses shows where a citation appears within text. The line below shows the cited reference(s).

4. Highlight the citation you want to customize.

5. Customize as needed:

   Exclude Author: Select this to omit the author name from the formatted citation.

   Exclude Year: Select this to omit the date from the formatted citation.

   Prefix: Enter text here to print immediately before the citation text (spaces are significant).

   Suffix: Enter text here to print after the citation text (spaces are significant). You can enter page numbers here if you always want them to print *after* the citation.

   Pages: Page numbers entered here are considered entered into a "Cited Pages" field, so they can be manipulated on output just like any other EndNote field. In order to print, the Cited Pages field must be listed in the citation template and/or footnote template of your output style. This is typically used to print the page numbers within a full footnote citation. Most EndNote styles that require a special format for citations in footnotes are already configured this way. You can modify the Citation Template in your output style to include Cited Pages.

6. Click *OK* to implement the change(s) to the citation.

Inserting Citations into a Formatted Paper (OpenOffice.org Writer)

If you need to add one or more citations to a paper that has already been formatted, simply insert the new citations into the text (as described earlier in this chapter) and choose *Format Bibliography* when you are ready to update the bibliography and citations.

To add a new reference to an existing citation, insert the new reference *next to* (not within) the existing citation, like this:

(Hockney and Ellis, 1996){Argus, 1984 #1}

Adjacent citations are merged during formatting, and the formatted citations are sorted according to the style:

(Argus, 1984; Hockney and Ellis, 1996)

Note: Do not insert a citation into the middle of a formatted citation. Insert it immediately before or after the existing citation, with no space between them.

Citing References in Footnotes and Endnotes (OpenOffice.org Writer)

Once you have created a footnote or endnote in OpenOffice.org Writer, you can cite references in that footnote or endnote just like you cite them in the body of the document.

To cite a reference in a footnote or endnote:

1. Use the appropriate command in OpenOffice.org Writer to create the footnote or endnote. (EndNote does not create the footnote or endnote in the document, but is used to insert and format citations in the note.)

2. Position the cursor in the footnote or endnote where you would like the citation(s) to appear.

3. Insert the citation as you normally would.

The EndNote style that is selected when you choose *Format Bibliography* determines how citations in footnotes and endnotes are formatted. EndNote can format these citations as brief in-text citations or like complete references in the bibliography. It can also create a special format specific to footnotes or endnotes,

including options like "Ibid." and other variations of shortened references when a citation appears more than once in the footnotes or endnotes. See Bibliography and Footnote Templates.

If you are citing full references in footnotes, you can include specific page numbers to be formatted like a regular EndNote field. See Customizing Individual Citations. Or, if you are manually typing citations, see Citing Specific Page Numbers in Footnotes.

Typing Citations into Your Paper

Typing Citations into Your Paper (OpenOffice.org Writer)

Manually entering citations is the same whether you are using Cite While You Write with OpenOffice.org Writer, or Cite While You Write with Microsoft Word, or Format Paper with an RTF file. See these topics:

Notes About Temporary Citations

Components of a Temporary Citation

Omitting Authors or Years from Citations

Citation Prefixes

Citation Suffixes

Including Semicolons & Other Citation Delimiters in a Citation

Examples of Modified Citations

Changing Existing Citations

Editing Citations (OpenOffice.org Writer)

Once you have inserted and formatted a citation, you should not edit it directly (although you *can* do so, if you feel you must). Direct edits are lost the next time EndNote formats the bibliography.

You can almost always get EndNote to format your citations exactly to your specifications by editing the style, the EndNote reference, or the citation (as described here).

Note: An easy way to omit the Author or Date from an individual citation is to select the citation, right-click with your mouse, choose *Edit Citation(s)* and then *Exclude Author* or *Exclude Year*.

To safely edit a formatted citation:

1. Click on the citation you wish to change.
2. From the EndNote menu, select *Edit Citation(s)* to display the EndNote Edit Citation dialog.

   All of the cited references in the document are listed in the left column of the dialog. An ellipses shows where a citation appears within text. The line below shows the cited reference(s).
3. Select the appropriate citation from the list at the left of the dialog (you can scroll through all citations in the document) and make any of the following changes to the highlighted citation:

   Exclude Author: Select this to omit the author name from the formatted citation.

   Exclude Year: Select this to omit the date from the formatted citation.

   Prefix: Enter text here to print immediately before the citation text (spaces are significant).

   Suffix: Enter text here to print after the citation text (spaces are significant).

Pages: Enter page numbers here to print as Cited Pages. To print, the Cited Pages field must be listed in the citation template or footnote template of the output style.

4. You can add or remove citations from a multiple citation, or change the order of citations.

   Insert: Use this to add another citation within the same set of delimiters.

   Remove: Highlight a citation and click *Remove* to delete it from the in-text citation.

   Up and Down Arrows: Highlight a reference and use the arrows to change the order of display. (If a Citation Sort Order is applied by the current output style, using this dialog to change the order of citations in a multiple citation has no effect.)

5. Click *OK* to implement your change(s).

After making changes, choose *Format Bibliography* to (re)format the new or modified citations and regenerate the bibliography.

Unformatting Citations (OpenOffice.org Writer)

Unformatting reverts formatted citations to temporary citations and removes the bibliography.

If your citations are formatted in a numbered style, you can unformat your paper to easily identify citations as you work. You can Format Bibliography again later.

Note: You must have the corresponding EndNote library open in order to format the paper again.

To unformat citations:

1. Determine which citations you want to unformat:

   To unformat a particular citation, highlight only that citation.

   If the citation you want to unformat is part of a multiple citation, highlight the multiple citation. All citations within the delimiters will be unformatted.

   To unformat a section of the document, highlight that section.

   To unformat the entire document, either select nothing or highlight the entire document.

2. From the *EndNote X4* menu, select *Unformat Citation(s)*.

If you are unformatting the entire document, this unformats all of the in-text citations and removes the current bibliography.

You can tell when a paper is unformatted because the citations appear in the temporary citation format (such as "{Smith, 1999 #25}").

Unformatted citations are temporary placeholders that do not reflect final output. You can format the paper again at any time.

Note: To format your paper again, go the *EndNote X4* menu and choose *Format Bibliography*.

Moving or Copying Citations (OpenOffice.org Writer)

You can highlight any text that includes citations, then use the Clipboard commands to *Cut* or *Copy* and then *Paste* it elsewhere in the document. You can do this with formatted or temporary (unformatted) citations.

To move or copy only the citation itself, make sure you highlight the entire citation (including any surrounding delimiters) as well as an extra character before and after the citation. Including the characters before and after the citation ensures that you include the hidden bookmark associated with the citation. (If the hidden bookmark is not part of the selection, you will copy plain text, and not an EndNote citation.) Then *Cut* or *Copy* and *Paste* it elsewhere in the document.

Deleting Citations (OpenOffice.org Writer)

To delete an unformatted citation, simply highlight the entire citation (including delimiters), and press the *Backspace* or *Delete* key.

While it is possible to highlight a formatted citation and simply press the *Delete* key on your keyboard, we do not recommend you do that. If you do not completely delete the citation and its associated bookmark, you could corrupt your document.

To safely delete a formatted citation:

1. In OpenOffice.org Writer, highlight the citation you want to delete.
2. From the EndNote X4 menu, select Edit Citation(s) to display the EndNote Edit Citation dialog.

Note: All of the cited references in the document are listed in the left column of the dialog. An ellipses shows where a citation appears within text. The line below shows the cited reference(s). The citation you highlighted in the document should be highlighted in the list.

3. In the left column, make sure the highlighted citation is the one you want to delete.

   If the citation is part of a multiple citation, make sure you select just the citation you want to delete.
4. Click *Remove*.
5. Click *OK*.

Generating Bibliographies

Generating Bibliographies (OpenOffice.org Writer)

Formatting a bibliography serves two functions:

It formats each in-text citation according to the selected bibliographic style.

It adds a complete bibliography to the document (unless you override this with a setting in the output style).

The format used for citations and references is determined by the output style selected.

When you have finished writing your paper, and all of your EndNote citations have been inserted into the text, you are ready for EndNote to format the paper and generate a bibliography. This can be done in one of these ways:

Instant Formatting actually works as you insert citations, and is enabled when you first start using Cite While You Write. EndNote uses the currently selected style to format citations and update the bibliography each time a citation is inserted. However, if you want to change the style or layout of references, you can use the *Format Bibliography* command.

Format Bibliography allows you to modify bibliography preferences such as style and layout before formatting your document.
From the *EndNote* menu, select *Format Bibliography*.

These are the basic formatting instructions:

1. In OpenOffice.org Writer, go to the *EndNote X4* menu and select *Format Bibliography*.
2. On the Format Bibliography tab, use the *With output style* option to select an output style to format references. It is okay to experiment with different styles because you can simply reformat again.
3. Click *OK* to format all citations and build the bibliography.

Formatting the Bibliography and/or Changing Bibliography Settings (OpenOffice.org Writer)

You may be halfway through inserting citations, or you may have finished writing your paper. As long as you have citations entered in your document, you can format your paper at any time. You can reformat after adding more citations or to change the style or layout settings.

Note: Each time a citation is formatted, the corresponding EndNote library must be open.

To format citations and generate a bibliography:

1. In OpenOffice.org Writer, go to the *EndNote X4* menu and select *Format Bibliography*.
2. On the Format Bibliography tab, change or verify these settings:

   With output style: Select the appropriate output style to format references. You can experiment by reformatting with various output styles. To add more output styles to the list, see Adding Styles to the Output Styles List.

   Temporary citation delimiters: These are the opening and closing delimiters for temporary citations. Make sure they are unique delimiters, and not characters you would normally use in your paper. The defaults are curly braces.
3. On the Layout tab, change or verify these settings:

   Font and Size: These are the text font and size used for the bibliography.

   Bibliography title: To print a title at the top of your bibliography, type the title in this text box.

   Text Format: Highlight the bibliography title text and then use the *Text Format* button to display a dialog where you can change the format of the highlighted text.

   Start with bibliography number: Enter a starting reference number if you want to number your bibliography.
4. Click *OK* to save changes and format your citations and bibliography.

Note: You do not have to verify each tab every time you format. If all you want to do is change the output style, choose *Format Bibliography*, select the output style on the Format Bibliography tab, and click *OK*.

Reformatting Papers (OpenOffice.org Writer)

Adding New Citations to Formatted Papers

If you add more citations to your paper after the formatting process, you can update the citations and the bibliography by simply choosing the *Format Bibliography* command again.

Note: You do not need to unformat your citations in order to reformat them.

Reformatting with Different Styles

To reformat your paper in a different style:

1. In OpenOffice.org Writer, go to the *EndNote X4* menu and choose *Format Bibliography* again.
2. Select a new style from the Format Bibliography dialog and click *OK*.

Your citations and bibliography are updated for the new bibliographic style. See Adding Styles to the Output Styles List for information about expanding the list of available styles.

Creating a Bibliography from Multiple Documents (OpenOffice.org Writer)

You can use the OpenOffice.org Writer Master Document feature to generate a single bibliography from multiple documents. This allows you to create a cumulative bibliography from any number of book chapters.

To generate a single bibliography:

1. In each of your documents, or chapters, insert your citations to link them to references in an EndNote library.
2. In each document, go to the *EndNote X4* menu and choose *Unformat Citations* to unformat all of the citations in the document.
3. *Close* all of your documents.
4. Create a *File>New> Master* document.
5. Insert and display each of your chapters as subdocuments. (Check the OpenOffice.org Writer help documentation if you need step-by-step instructions.)

Note: If you have collapsed subdocuments to hide their content in Outline view, make sure you expand them in order to display the contents of all subdocuments before continuing.

6. From the *EndNote X4* menu, select *Format Bibliography*.

Note: Your documents must allow read/write access; they cannot be designated *Read-only* (locked).

7. Verify the formatting options and click *OK*.

EndNote creates the bibliography, using citations from the master document and all displayed subdocuments, and places it at the end of the master document. You can move the bibliography anywhere within the master or subdocuments, and it will remain in that location even when you reformat.

Note: If you choose Writer's *Insert* > *File* command and select the "Link" option to insert a document into the text, EndNote will *not* format the linked document when you format the main document. The text from the linked document will be skipped.

Directly Editing Bibliographies (OpenOffice.org Writer)

It is always best to make changes to your final bibliography by correcting the data in the EndNote library, editing the output style you are using, or adding or deleting citations from your paper. Then, after making the necessary changes, format the bibliography to automatically make the corrections.

It is not always possible for EndNote to format the bibliography exactly as needed, so you might need to manually edit the formatted bibliography. If you must do this, remember that if you reformat a paper *after* editing the bibliography, EndNote will *not* preserve your edits. When EndNote reformats a bibliography, it deletes the existing one and puts a new one in its place.

You can edit the bibliography as you would any text. The bibliography may be shaded, but you can still edit it. If you later reformat the paper, your edits will be gone.

You can add text *after* the bibliography, but make sure to put it well after the end of the formatted bibliography—outside of the bibliography field.

See Modifying Style Templates for instructions about editing styles.

Moving Bibliographies (OpenOffice.org Writer)

Cite While You Write always creates the initial bibliography at the end of the OpenOffice.org Writer document that it has formatted. We recommend that you leave the bibliography at the end of the document, but realize that is not always possible. Below are some options for moving the bibliography to a different location in your paper.

Note: Please back up your document before you begin!

Add Text After the Bibliography

You may want to add text after the bibliography. You can do this, but make sure you are well beyond the end of the bookmarked bibliography field. If you add text to the bibliography field, it will disappear the next time you generate a bibliography.

Copy and Paste the Bibliography

You can copy and paste the bibliography, but it gets tricky! First, highlight the entire bibliography field—but make sure you include the two paragraph markers before the start of the bibliography (or the two paragraph markers before the bibliography title, if you have included one), plus the complete bibliography, plus the paragraph marker after the bibliography. Then, *Cut* the bibliography and *Paste* it in the new location.

Note: If you have not selected the complete, bookmarked bibliography field, you will have copied and pasted plain text. The text in the new location will never get updated, and the bibliography in the old location will change as you update citations or reformat the bibliography.

Once you have moved the complete, bookmarked bibliography field to a different location in the document, EndNote keeps it there even when you reformat the paper.

Deleting Bibliographies (OpenOffice.org Writer)

To delete a bibliography, select the bibliography and then delete it.

Make sure you drag the cursor from the line above the bibliography to the end of the bibliography in order to select the entire bibliography field. Press the Backspace or Delete key. You can also *Cut* the bibliography if you want to paste it somewhere else.

Setting Cite While You Write Preferences

Setting Cite While You Write Preferences (OpenOffice.org Writer)

To access and set Cite While You Write preferences:

In OpenOffice.org Writer, go to the *EndNote X4* menu and select *Cite While You Write Preferences*.

Open EndNote When Starting OpenOffice.org Writer

Select this item to always open EndNote when you start OpenOffice.org Writer.

Close EndNote When Leaving OpenOffice.org Writer

Select this item to always close EndNote when you leave OpenOffice.org Writer. This works only when the EndNote program was launched with one of the Cite While You Write commands from within Writer or if the *Open EndNote When Starting Writer* preference is selected.

For information about other EndNote preferences that directly affect Cite While You Write, see Related EndNote Preferences.

Making Changes to the EndNote Library

Editing a Reference in the Library (OpenOffice.org Writer)

You may insert a citation into an OpenOffice.org Writer document, and then later edit the corresponding reference in EndNote. Are those changes reflected in your Writer document?

Your citations and bibliography will reflect the edits the next time you reformat the paper with the EndNote library open. Open your document, open your EndNote library, and choose *Format Bibliography* from the *EndNote X4* menu in OpenOffice.org Writer. EndNote will not be able to make the update if the library is not open during formatting.

Note: The author's last name and the publication year are both used to identify a reference, so changes to these items in an EndNote reference are *not* reflected in the in-text citation. Cite While You Write will no longer identify a match between the citation and the reference.

Deleting a Reference From the Library (OpenOffice.org Writer)

The first time a citation is formatted, EndNote uses information from the unformatted citation to look in the open library and find the corresponding reference. If you later reformat, EndNote again looks in the library for that reference.

If you have deleted the corresponding reference from the EndNote library, EndNote will not be able to find the reference information for formatting.

If you add the reference to the library again, it will be assigned a different record number. You would need to re-insert the citation with OpenOffice.org Writer.

Record Numbers

EndNote assigns a unique record number to each reference as it is added to your library. These record numbers appear in temporary citations to ensure that the correct reference is used when the paper is formatted:

{ Argus, 1991 #11}

The record number for a reference is also visible in the title bar of the Reference window.

Keep the following points about record numbers in mind:

- EndNote automatically assigns a record number sequentially to each reference as it is added to a library.
- If the same reference appears in two different libraries, the record numbers will most likely be different.
- Record numbers are never reused or reassigned within a library. When you delete a reference, the corresponding record number is never used again in that library.
- You cannot modify or reassign record numbers.
- We recommend that you *not* rely on EndNote's record numbers as a means of filing or numbering your office reprints, because *you have no control over this number*. Instead, enter your own unique number into the Label field, or any Custom field, and use that number for your reprints.

If you add the reference to the library again, it will be assigned a new, different record number, so EndNote still will not be able to find it when formatting your paper. You will need to reinsert the citation into the paper using the new reference in your library.

Sharing Your Writer Documents

Sharing Your Writer Documents (OpenOffice.org Writer)

You can directly share your OpenOffice.org . ODT files with colleagues.

If you want to convert your document for use with a previous version of Writer or a different word processor, you should *Unformat Citations* before saving in the different file format. Then, you may be able to reformat. The corresponding EndNote library (or libraries) must be available in order to format.

Of course, if you just want to print a copy of the paper for someone, you do not need to do anything to your document other than print it!

Working on Different Computers (OpenOffice.org Writer)

If you are working on a single paper and moving between different computers, it is best to keep a copy of your reference library with your paper. That way you will always access the same library when inserting citations. If you separately add references to a copy of the library at home and to a different version at work, record numbers may not match up correctly. You want to make sure that any library edits are reflected in your Word document.

If you are inserting citations on only one machine, it is fine to move the document itself to other machines—as long as you will be accessing the document with the same version of Writer.

You cannot format citations in your OpenOffice.org Writer document unless the associated EndNote library is available.

Saving Files for Other Versions of Writer and Other Word Processors

If you open your document with a different version of Writer, or use the *Save As* command to save a formatted copy of your paper in another format, you may lose the ability to format citations in that document.

If you plan to use your document with a different word processor, a different version of OpenOffice.org Writer, or on a Macintosh machine, you should *Unformat Citations* before converting the document to the other file format.

Unformatted citations are regular text; however, they are temporary placeholders that do not reflect final output. See Unformatting Citations.

You can unformat citations and then save the document as a Microsoft Word file, as an older version Writer ODT file, or as an RTF file. For Word files, use Cite While You Write for Microsoft Word to reformat the paper. For older ODT files or RTF files, use Format Paper to format citations from these placeholders.

Moving Documents between Microsoft Word and Writer

You can convert your Microsoft Word documents for OpenOffice.org Writer and vice versa. Always start by making a backup of the original document!

With the original word processor, make sure you first unformat citations, then *Save* the document, and then close the word processor. Then, open the file with the other word processor. You must have the associated EndNote library available and open in order to format the citations and bibliography.

Note: If you have both Microsoft Word and OpenOffice.org Writer open, the Cite While You Write commands available within EndNote are active for the word processer that was launched first.

There are several Cite While You Write functions that are available only in Microsoft Word, and not in OpenOffice.org Writer. These include:

- using the template wizard
- inserting notes
- inserting figures and tables
- constant background instant formatting
- creating multiple bibliographies in a single document with sections
- using a traveling library (rather than always having the library available and open)

RTF Files/Scanning and Formatting

Word Processor Compatibility (Format Paper)

You can create formatted citations and bibliographies for your papers *without* using Cite While You Write™ for Microsoft® Word or OpenOffice.org Writer . Use Format Paper to cite references and create bibliographies for documents that can be saved as RTF, including documents created with:

Microsoft® Word
WordPerfect®
OpenOffice.org™ Writer
StarOffice™ StarWriter
Microsoft® Works
WordPad
Almost any application that can save as RTF (Rich Text Format)

The Format Paper feature also works with the Open Document Format used by the OpenOffice.org Suite. You can format OpenOffice.org Writer documents ending with the extension . ODT.

Note: EndNote uses Unicode to appropriately display diacritics and other extended characters. If these characters do not display correctly when you format EndNote citations and references in your word processor document, it may be because your word processor lacks Unicode support. Please refer to your word processor's documentation.

To format references and create a bibliography (Cite While You Write) with Microsoft Word 2003 or 2007 , see How to Cite While You Write with Microsoft Word.

To format references and create a bibliography (Cite While You Write) with OpenOffice.org Writer, see How to Cite While You Write with OpenOffice.org Writer .

While you *can* use the Format Paper feature to format Word files saved as RTF , or OpenOffice documents with the extension ODT , it is much easier and more efficient to use Cite While You Write.

To create a stand-alone bibliography that is not based on the citations in a paper, see Independent Bibliographies.

For up-to-date compatibility information, see our Web site at http://www.endnote.com.

Basic Instructions (Format Paper)

This topic describes how to create formatted citations and bibliographies for your papers *without* using Cite While You Write™ for Microsoft® Word or OpenOffice.org Writer .

The basic steps required to cite references in a paper and "format" that paper using EndNote are covered here. More details about how to switch between programs and various tips for citing references are described in the sections following these basic instructions.

Citing references is a straight-forward process of copying temporary citations from EndNote and pasting them into your word processing document. While writing a paper in your word processor, you can have EndNote running in the background so that it's easy to switch between the two programs when you need to cite a source. Although you can enter the EndNote temporary citations into a paper at any time, most writers find it convenient to enter the citations as they are writing the paper instead of waiting to insert them after the text is written.

Note: The *Format Paper* command works on RTF documents or OpenOffice.org Writer documents. You create your paper and insert citations with your word processor. You can scan OpenOffice.org Writer documents directly. When you are ready to scan and format citations for other document types, you must first save a copy of your paper as RTF, and then scan that copy of the paper..

To practice using the Format Paper feature, you can follow this procedure using one of the example documents found in the EndNote X4\Examples folder. We recommend experimenting with the Sample_RichText.RTF or Sample_OpenDocType.ODT file along with the Sample_Library_X4 .

To cite a reference in a paper:

1. Start your word processor and open the paper you are writing.

   As an example, you can locate and open Sample_RichText.RTF found in the EndNote X4\Examples folder. If you use OpenOffice.org Writer, you can use Sample_OpenDocType.ODT as an example.

2. When you are ready to cite a source, position the cursor in the text where you would like to put the citation.

   ...a commonly documented phenomena **|**.

3. Start EndNote and open your library (if it is not already open). See Opening a Library if you need help with this step.

4. Select the reference(s) in your EndNote library that you want to cite. Press the Ctrl key while clicking on the references to select multiple references; press the Shift key to select a range of references.

5. Choose *Copy* (Ctrl + C) from the Edit menu, then return to your word processor and *Paste* (Ctrl +V) the temporary citation into the text of your document.

OR

Drag-and-drop the selected citations into your paper.

The pasted citation appears in EndNote's temporary format: first author's last name, year of publication, and record number, all enclosed in curly braces:

{ Morehouse, 1993 #125}

If multiple references were selected, their citations appear together within one set of delimiters in the order in which they are listed in the Library window.

{Hall, 1999 #90; Baker, 1988 #38}

This citation is *not* the final citation, but rather a temporary citation that will be formatted later. The number in the temporary citation is not a *bibliography number* but a unique *record number*. When you format this paper, EndNote builds a bibliography based on the temporary citations that it finds in the paper, and reformats them according to the selected style.

Continue following steps 2-5 to insert citations as you write your paper.

To save your document:

6. When you have finished adding citations, choose *Save* from your word processor's File menu to save all changes to your document.

7. If the file you created is not an OpenOffice.org Writer document or an RTF document, save a copy of the file as RTF. From the File menu, choose *Save As*. In the file dialog, set the type of file as RTF. RTF retains most styles and formatting.

8. Close your document by choosing *Close* from the File menu. You can leave your word processor running.

To generate the bibliography:

9. Return to EndNote.

10. *Tools* menu, go to the *Format Paper* submenu and then *Format Paper*.

11. Navigate the file dialog to locate and select the RTF document or ODT document.

The next time you choose *Format Paper* you will see your recently used files listed for easy access.

12. Check the Citations window to make sure that EndNote was able to find matching references for all of the citations.

During the scanning process, EndNote locates temporary citations in the paper, and searches the library to find references that match each of the citations. When scanning is complete, EndNote displays the Citations window. The Citations window lists the citations found in the paper together with the number of matching references in the open libraries.

The citations in the Citations window appear in the order they are cited in the paper. If a reference is cited more than once in a paper, it is listed more than once in this window; however the reference will appear only once in the bibliography.

Every citation listed in the Citations window should have a "1" next to it in the Matches column, meaning that EndNote found exactly one reference in the library to match the citation in the paper. When all of the citations in the window have a "1" next to them, you are ready to go on to the next step of formatting a paper. If a "0" or a number greater than one appears in the Matches column, you may need to resolve mismatched citations.

13. Select a style from the Output Styles list on the Citation window. Enter a starting bibliography number if you wish.

The individual styles listed are the styles that are currently selected as your "favorites" in the Style Manager. If you need to choose a style that is not in the list, choose *Select Another Style* to open the Style Manager. Mark your favorite styles there, and start this step again. See Adding Styles to the Output Styles List.

14. Click *Format* to have EndNote create a copy of your paper complete with formatted citations and a bibliography.

15. You are then prompted to name and save the formatted copy of the paper.

EndNote automatically adds the name of the output style to your existing filename. You can change the name of the formatted document if necessary by typing a new name in the text box. You can also use the "Save in:" list at the top of the window to change the location where EndNote saves the file. By default EndNote saves the formatted file in the same location as the unformatted file.

Important! ***Never*** save the formatted paper with the same name as the original unformatted document. You must have the unformatted document if you ever want to format the paper again.

While EndNote is formatting, the cursor changes to a wait cursor. When the formatting has finished, the cursor returns to an arrow and the Citations window remains open. Now that EndNote has generated a formatted copy of the paper, you can open that paper in your word processor.

16. Switch to your word processor (see Switching Between EndNote and a Word Processor).

17. Choose *Open* from the word processor's File menu and select and open the formatted version of the paper. Remember that you want to open the file that has the name of the style appended to the file name.

In the formatted paper, EndNote has replaced the temporary citations with formatted citations and inserted a bibliography. The paper is ready to be printed and submitted!

Making Changes to the Paper

If you need to make changes to the paper (such as change a citation, add more text, or change the bibliographic style), you should edit the *original* unformatted document, and then format it again. EndNote will generate a new formatted copy of the paper. See Reformatting a Paper.

Tips on Citing Sources

Temporary vs. Formatted Citations

A "citation" is the bibliographic information in the body of a paper that refers the reader to a complete reference in the bibliography. Normally a citation consists of a bibliography number or the author and year in parentheses:

... of the species at hand[1].

... of the species at hand (Argus, 1991).

When you first copy an EndNote citation and paste it into your paper, it appears in EndNote's **temporary citation** format. This format consists of the first author's last name, year, and the EndNote record number, with citation delimiters at each end.

{Author, Year #Record Number}

When EndNote formats this paper it replaces the temporary citations with **formatted citations**.

Temporary Citation: {Argus, 1991 #11}

Formatted Citation (in APA): (Argus & Matthews, 1991)

EndNote relies on the temporary citations to determine which references to include in the bibliography. During formatting, EndNote scans your word processing document for temporary citations, finds their matching references in the EndNote library, and creates a duplicate of your document complete with "formatted" in-text citations and a bibliography at the end. This new document is called your "formatted" paper.

Note: By default, citation delimiters are curly braces. If you have other text within curly braces, you may want to change your citation delimiters.

Switching Between EndNote and a Word Processor

With your EndNote library and word processing document both open, you can switch between the two files without closing either program.

To run both programs simultaneously in Windows:

1. Start EndNote by clicking the Windows *Start* button in the taskbar, then choose *Programs*, select *EndNote*, and pick *EndNote Program.* EndNote starts and prompts you to open your library. (To set a library to open automatically, see Setting a Default Library .
2. You can start your word processor in a similar fashion by clicking the *Start* button, choosing *Program Files*, and selecting the option for your word processor.
3. Once you have EndNote and your word processor running, you can switch between the two programs by clicking the taskbar button along the bottom of the screen for the program you wish to use.

   You can also press Alt+Tab to switch between the programs. If you are running more than just EndNote and your word processor, keep the Alt key pressed, and press the Tab key repeatedly to cycle through all open programs. When you see the name of the program you want, release both keys.

Multiple References in One Citation

If you need multiple references in one in-text citation, you can accomplish this in one of two ways. One option is to insert all of the citations together:

To insert multiple citations:

1. Hold down the Ctrl key while clicking on the desired references in your library (or hold down the Shift key to select a continuous range of references).

2. From the Edit menu, choose *Copy.*
3. Position the cursor in your word processing document where you want the citations, and choose *Paste* from the Edit menu.

The citations are inserted together in one set of delimiters. Once formatted, they appear in one multiple citation, sorted as your bibliographic style requires:

Unformatted: {Hall, 1999 #90; Baker, 1988 #38}

Formatted: (Baker, 1988; Hall, 1999)

The other option is to add the citations to the paper individually. EndNote merges *adjacent* citations automatically during the formatting process. Citations do not merge, however, if any character, including spaces or punctuation, separates them.

Unformatted: {Hall, 1999 #90}{Baker, 1988 #38}

Merged when Formatted: (Baker, 1988; Hall, 1999)

Note: If one of the citations in a multiple citation cannot be matched during formatting, the entire citation will remain unformatted.

Citing References in Footnotes (Format Paper)

Once you have created a footnote or an endnote in your word processing document, you can cite references in the footnotes or endnotes just like you cite them in the body of the text.

To cite references in footnotes:

1. In your EndNote library, select the reference(s) that you would like to cite and choose *Copy* from the Edit menu.
2. Create the footnote or endnote using the appropriate command in your word processor. (EndNote does not actually create the footnote or endnote in the document, but it is used to insert and format the citations in the notes.)
3. Position the cursor in the footnote or endnote in your paper where you would like the citation(s) to appear and choose *Paste* from the Edit menu.

The EndNote style that is selected when you choose *Format Bibliography* determines how the citations in the footnotes or endnotes will be formatted. EndNote can format these citations as brief in-text citations or like the complete references in the bibliography. It can also create a special format specific to footnotes or endnotes, including options like " Ibid." and other variations of shortened references when a citation appears more than once in the footnotes or endnotes.

Typing Citations into Your Paper (RTF Files)

Manually entering citations is the same whether you are using Format Paper with an RTF file or Cite While You Write with Microsoft Word. See these topics:

Notes About Temporary Citations

Components of a Temporary Citation

Omitting Authors or Years from Citations

Citation Prefixes

Citation Suffixes

Including Semicolons & Other Citation Delimiters in a Citation

Examples of Modified Citations

Record Numbers (Format Paper)

EndNote assigns a unique record number to each reference as it is added to your library. These record numbers appear in the temporary citations to ensure that the correct reference is used when the paper is formatted:

{Argus, 1991 #31}

The record number for a reference is also visible in the title bar of the Reference window.

You may also see record numbers in the Library window by choosing Record Numbers as one of the display fields for the Library window. See Display Fields.

Because these record numbers are so important, keep the following points in mind:

We recommend that you do not rely on EndNote's record numbers as a means of filing or numbering your office reprints, because you have no control over this number, and it is subject to change under certain conditions (read on). Instead, enter your own unique number into the Label field, or any Custom field, and use that number for your reprints.

EndNote automatically assigns a record number sequentially to each reference as it is added to a library.

If the same reference appears in two different libraries, the record numbers will most likely be different.

The record numbers are never reused or reassigned within a library. If you delete a reference, that number is never used again in that library.

You cannot modify or reassign record numbers.

Deleting References in the Library

If you delete a reference from your library after you have cited it in a paper, EndNote will not be able to find it when it tries to format that paper. If you add the reference to the library again, it will be assigned a new, different record number, so EndNote still will not be able to find it when formatting your paper. You will need to reinsert the citation into the paper using the new reference in your library.

Formatting Citations and Creating Bibliographies

The Citations Window (Format Paper)

The Citation Matches window opens in the EndNote program after you format a paper (or if the formatting process is canceled). It lists all of the citations found in a document, in the order in which they appear in the paper.

In the Citations window, EndNote brings special attention to unmatched and ambiguous citations. You can choose from the check box options to show only the Matched Citations, Unmatched Citations, or Ambiguous Citations.

The Citations window lists all of the citations found in the document and displays the number of matching references for each citation.

If any number other than a 1 appears in the Matches column, the corresponding citation will be left unformatted in the document and will not be included in the bibliography EndNote generates.

Ambiguous Citations (Matches Greater than 1)

A number greater than 1 indicates that multiple references in the currently open library (or libraries) match the citation and EndNote does not know which reference to use. (EndNote automatically checks the matching references to see if any are duplicates. If so, they are not listed as separate possible matches.) To see which references are considered matches, highlight the citation in the Citations window and click Lookup. Reinsert the correct citation into the paper.

Unmatched Citations (A "Zero" Match)

A zero in the Matches column indicates that there is no matching reference in any open library for that particular citation. The Author, Year, and Record Number (if used in the temporary citation) must all match the Author, Year, and Record Number of a reference in the library in order for EndNote to consider it a match.

If text in your document is surrounded by citation delimiters (such as "{ sic}"), EndNote will treat the text as a mismatched citation. You can ignore the warning about it being a mismatched citation, and EndNote will simply leave the text as it was before formatting. (You could also change the Citation Delimiters.)

Uncheck the "Unmatched Citations" box at the top of the Citations window to hide these items from view if you have numerous sections of bracketed text in your document and the corresponding unmatched citations are just cluttering the Citations window.

Correcting Mismatched Citations

Mismatched citations must be corrected either in the word processing document or in the EndNote library—whichever contains the incorrect information. Normally, the easiest way to fix a mismatched citation is to search the word processing document for the mismatched citation (use the *Find* command in your word processor's *Edit* menu), delete it, and then reinsert the citation from the library.

If there is a citation for which EndNote lists multiple matches, you can highlight the citation in the Citations window and click Lookup. EndNote displays the matching references in the Library window. You may then select the appropriate reference and reinsert it into the paper. Mismatches of this type are only possible when the record number has been omitted from the temporary citation in the text.

After you have corrected the mismatched citations and saved your changes to the paper, Format again. (The Citations window is still available after formatting if you want to see the list of citations.)

The best way to avoid citation mismatches:

> Keep all of your references in one main library.
>
> Copy and paste your citations from EndNote to your word processing documents instead of typing them.

Bibliographic Styles (Format Paper)

The bibliographic style determines how EndNote formats the citations in your paper and the references in the bibliography. The style takes care of all text styles, punctuation, and sorting required for the citations and bibliography, as well as which fields are included in the bibliography.

Choose a style on the Citations window after choosing *Format Paper*. You can always run Format Paper to select a different style and reformat your unformatted (original) RTF document at any point.

The EndNote Styles collection includes more than 1900 styles, all of which can be modified to meet your specifications. You can also create completely new styles if necessary. Related topics:

- See Adding Styles to the Output Styles List to learn more about the Styles Manager and how to get the styles you need to appear in EndNote's Output Styles list.
- To learn about how the styles work, and how you can modify them, see What is an Output Style?

- For help with choosing the right style for your paper, see Previewing Formatted References (or Styles).

Previewing Formatted References (or Styles)

The preview tab in the Library window displays how the currently selected reference will be formatted in the bibliography by the current style. This preview tab shows only one reference at a time.

To preview how multiple references will appear in a bibliography:

1. Select the references in the Library window.
2. From the *Edit* menu, choose *Output Styles* and select the style that you would like to use.
3. From the *Edit* menu, choose *Copy Formatted* (Ctrl+K) .
4. Use the Windows Clipboard Viewer to view the contents of the Clipboard, or *Paste* the formatted references into a word processor document.

Reformatting a Paper

Since EndNote creates a *copy* of the paper during the formatting process, you can always reformat the original document, if necessary, to create a new document with the changes that you need.

Reformatting with Different Styles

The appearance of both the in-text citations and the bibliography in the formatted paper is determined by the selected style. If you need to create a copy of your paper in a different style than what you did originally:

1. From the Tools menu in EndNote, choose *Format Paper>Format Paper*. Open the *original* unformatted copy of your paper (the one with the EndNote citations surrounded by curly braces or brackets).
2. On the Citations window, select a new output style from the Output Style drop-down list. You can select one of the "favorite" styles currently in the list, or choose *Select Another Style* to pick a style from the 4,500 + styles shipped with EndNote.
3. If the Citations window shows that all the citations in the paper are correctly matched, click the *Format* button.
4. EndNote will prompt you to name and save the new formatted copy of the paper. Notice that the style name is included as part of the new paper's name. That will help you distinguish between various copies of one paper (perhaps formatted to be submitted to different journals).

When you open the new formatted copy of your paper, you should see that your citations and bibliography use the new bibliographic format.

Important: When you need to make changes in your paper, remember to work only with the *unformatted* copy of the paper (the one with the bracketed temporary citations), rather than the formatted copy that EndNote created.

Adding New Citations to Formatted Papers

If you have already formatted your paper, and you see that it needs to be edited by either adding or removing citations, you must return to the original, unformatted copy of the document (the one with EndNote's "temporary citations"). Open that document in your word processor. Add, modify or delete citations as necessary, and then save the paper as RTF. You may now format the paper (as described above) to create an updated copy of it.

Creating One Bibliography From Several Papers

EndNote can format a series of separate word processing documents and put a cumulative bibliography at the end of the last one. This is useful if you are collaborating with other EndNote users and you have each written a separate part of the paper, or if you have separated a lengthy paper into different chapters.

To create one bibliography from several papers:

1. From the *Tools* menu, choose *Format Paper>Format Paper* to open and scan the first paper.
2. A *Scan Next* button appears on the Citations window. (The *Format Paper* command on the menu changes to *Scan Next*). Click *Scan Next* in the window, or select it from the menu, to open each of the subsequent papers in the correct order. Each paper's citations will be added to the list of citations in the Citations window.
3. When the last paper has been scanned, select an output style on the Citations window and click *Format*.

During the formatting process, EndNote makes a formatted copy of each paper and puts a cumulative bibliography at the end of the last paper. Only the last paper in the series will include the bibliography. By default, each formatted paper retains its original name with the style name incorporated into it; however, you have the option to change the names.

Specifying the Starting Number of a Bibliography (Format Paper)

When you choose *Format Paper* to display a Citations window, EndNote includes an output style list to confirm or change the style that should be used to format the paper. It also gives you the option to change the starting number for your citations and bibliography.

If you would like EndNote's numbering to start with a number other than "1" for the document that you are formatting, enter that number here. This setting is ignored if you are formatting the paper with a style that does not create numbered references in the bibliography.

Copying Formatted References

There may be times when you want to insert a fully formatted reference into the body or footnotes of your paper without having to format an entire document.

To insert a fully formatted reference:

1. Select a style from the list of styles on the .
2. Select the reference(s) in the Library window.
3. Choose *Copy Formatted* from EndNote's Edit menu.
4. Switch to your word processing document, position the cursor in the text, and select *Paste* from the Edit menu.

If your word processor supports drag-and-drop, you may also drag the references and drop them on your paper with the Ctrl key pressed. This produces the same results as using the *Copy Formatted* command.

Multiple references are sorted according to the rules of the selected style. Fonts and character styles are transferred if you are pasting into a program that interprets styled text or Rich Text Format (RTF) information on the Clipboard.

Rescanning the Paper

If there is a problem with your citation matches after choosing *Format Paper,* leave the Citations window open and switch to your word processor to make the necessary changes. After saving your changes, close your document and switch back to EndNote. On the Citations window, click *Rescan Paper.*

EndNote then updates the information in the Citations window to reflect the recent changes made to the paper. If the paper was modified and saved since it was last scanned, EndNote prompts you to rescan the paper before formatting.

Managing Your EndNote Library

Modifying References in Your Library

If you add or change a reference in your library while the Citations window is open, make sure you click *Rescan* to have those changes reflected in the Citations window and in the formatted paper.

For example, if you typed the citation { Geoffery, 1988} into your paper but forgot to enter the reference in the library, EndNote would list a "0" in the Matches column for that citation on the Citations window. You can leave the Citations window open and enter the Geoffery reference into your library. Bring the Citations window forward and use the *Rescan* button to recheck the library for matching references. This should change the "0" match to a "1."

Finding EndNote References for Editing (Format Paper)

In the Citations window, you can select any number of matching references and then click *Lookup* to search and display those references in EndNote's Library window. You can open each record for viewing or editing. If you edit a reference, make sure you *Rescan* your paper to reflect the changes.

Formatting with Multiple Libraries

Although EndNote can format papers using references from more than one library, we do not recommend that you use multiple libraries when writing a paper. Keeping all of your references together in one library simplifies the writing process because you know exactly where to find each reference, and you only need to have the one library open when formatting.

If you are collaborating with other authors on a document, however, using multiple libraries for a paper may be a useful and necessary thing to do.

If citations have been inserted into one document from multiple libraries, all of the necessary libraries must be opened in order for EndNote to format the paper correctly.

Note: Read about the Merge Duplicates in Bibliography preference if you plan to insert citations from more than one library into a paper.

Finding and Labeling References Used in a Paper

The Citation Matches window appears when you format a word processing document. It lists all of the citations found in a document, and displays the number of matching citations found in the currently open libraries.

The Citations window is visible in the EndNote program after the formatting is finished, or if the formatting process is canceled. (If there are problems during formatting, consult the Citations window. This information can help you resolve problems.)

Double-click citations in the Citations window to find the matching references in your EndNote library.

To locate all of the references in a library that were cited in a paper:

1. After formatting your paper, select all of the citations listed in the Citations window by choosing *Select All* from the Edit menu.
2. Double-click to display the list of references in the Library window.

To add a keyword to all of these references for your own filing purposes:

1. Choose *Change Field* from the References menu.
2. Choose *Keywords* (or any other field you would like to use from the field popup menu.
3. Enter the term or phrase you want to use to identify these references, and click *Change*.

Working on Different Computers

If you are working on a paper on different computers, be sure to keep a copy of your reference library on the same disk as your paper. That way, you will always access the same library when inserting citations. If you add references to a copy of the library at home and to a different version at work, the record numbers may not match, and EndNote will be unable to find references when it scans your paper.

Independent Bibliographies

Independent Bibliographies

There may be times when you want to create a bibliography without an associated paper. We call this an "independent bibliography" because EndNote does not generate the bibliography based on citations found in a paper—instead, the bibliography is generated independently of a paper.

Any one of the procedures described in this chapter can be used to create an independent bibliography. Each has its own advantages, so look for the option that best suits your needs:

- Drag-and-drop to instantly transfer a bibliography to a word processing document
- Copy formatted references from a library and paste them into a word processing document
- Export references from a library as RTF, Text Only, HTML, or XML
- Preview and/or Print references from EndNote

Styles Determine the Look of the Bibliography

The appearance of your independent bibliography depends entirely on which EndNote style is selected in the Output Styles submenu of the Edit menu (or the drop-down style list on the Main toolbar). The styles determine what information is included in the bibliography, how it is arranged, and what punctuation and text styles are used.

Select a style that meets your needs before exporting, printing or formatting references. If you do not see the style that you need in the Output Styles submenu of the Edit menu, choose *Open Style Manager* from the Output Styles submenu, and mark the styles that you need. Once the styles are marked as "favorites" in the Style Manager, they will show up in your styles menus. For more information, see Adding Styles to the Output Styles List. For information about modifying styles, see Modifying Style Templates.

Using Drag-and-Drop to Create an Instant Bibliography

"Drag-and-drop" is a way of moving or copying selected text (or other items) by clicking on the text and dragging it to a new location. Simply release the mouse button when the cursor is over the destination, and the text will either be moved or copied to the new destination.

If your word processor supports drag-and-drop, you can drag a bibliography from an EndNote Library window directly into your paper.

To drag your bibliography:

1. Open your library and select the desired references.
2. Select the necessary style from the *Output Style* submenu of EndNote's Edit menu.
3. Hold down the Ctrl key as you drag the references from the library and drop them directly onto a word processing document in the background.

This creates a fully formatted bibliography with the references formatted and sorted according to the selected style. The font used for the bibliography in this case is the "General Display Font." You can change this font by choosing *Preferences* from the *EndNote*

Edit menu, selecting *Display Fonts*, and choosing a new font and size under the General Display Font heading. All text style information (such as bold and italic) is retained if you "drop" the bibliography into a program that recognizes RTF (Rich Text Format) text.

If your word processor does not support drag-and-drop, read about the *Copy Formatted* command.

Note: Dragging with the Ctrl key pressed transfers the formatted references to the word processing document. If you do not hold down the Ctrl key, only the temporary citation is transferred. Use this latter method to cite references in your paper.

Copy Formatted

Use the *Copy Formatted* command to quickly create and copy a bibliography that you can paste into a word processing document, or anywhere else. The references are sorted and formatted according to the rules of the selected style.

The font used for the *Copy Formatted* command is the "General Display Font" which can be changed by choosing *Preferences* from the *Edit* menu, selecting *Display Fonts*, and choosing a new font and size under the General Display Font heading. All text style information (such as bold and italic) is retained if you paste into a program that recognizes RTF (Rich Text Format) or styled text.

To copy formatted references from EndNote and paste them into a word processing document:

1. On the toolbar, go to the *Output Style* list and select the necessary style.
2. Open your EndNote library and select the desired references in the Library window.
3. From the *Edit* menu, choose *Copy Formatted* (Ctrl + K) to copy the references to the Clipboard.
4. Open a document in your word processor, put the cursor where you would like the references to appear, and choose *Paste* (Ctrl +V) from the word processor's *Edit* menu.

Exporting References

Exporting References

Exporting bibliographies from EndNote is easy and flexible. When you export from a library, EndNote creates a file of references formatted according to the chosen style.

You can export either all of the references in the current references list, or only the selected (highlighted) references in the current list. If any references in the Library window are selected, the EndNote export dialog gives you the option of exporting just those selected references.

To export a bibliography from EndNote:

1. Open the library from which you will export, and show the references you want to export.

   To export all of the references in the library, click the All References group or choose *Show All References* from the *References* menu.

   To export a subset of references, display a group or use the *Search Library*, *Hide Selected References*, or *Show Selected References* commands to show the subset of references you want to include. You can further limit the list of references to export by highlighting just those references in the current list.

2. (Optional) References will be exported in the order specified by the selected output style. If you want to change the sort order, you must modify the output style:

a. From the *Edit* menu, choose *Output Styles* and then *Open Style Manager*.

b. Select the output style and click *Edit*.

c. In the left pane of the window, under *Bibliography*, select *Sort Order*.

d. Change the current sort order in the right pane. If you want to export references in the order in which they are listed in the current Library window, choose *Order of appearance*.

e. Close the output style and the style manager.

3. From EndNote's *File* menu, choose *Export*.

4. From the "Save File as Type" list at the bottom of the dialog, select the type of file to be exported.

5. From the "Output style" list at the bottom of the dialog, choose a style (or choose "Select another style" to choose from all available output styles).

6. Select the "Export Selected References" option if desired. If you want to export all of the references in the current list, clear the check box.

7. Enter a name for the exported file and use the *Save in* list to specify where it should be saved and use the triangle button to allow you to browse to the appropriate folder and specify where the file should be saved.

Note: The Export feature creates a new file; it does not append to an existing file. If you enter the name of a file that already exists, that file will be overwritten.

8. Click *Save*. (It is best to keep the assigned file extensions as part of the exported file name.)

9. Open the exported file in a word processor to edit or print it. At this point, the file is just like any other text document. You can change the font, margins, line spacing, or other page layout features if necessary. (If you use the *Open* command in your word processor, make sure that the open file dialog is set to show files with the correct extension.)

If you exported the references in HTML format, your exported reference list is ready to be posted directly to your web site. In your Web browser, set encoding to "Unicode- UTF 8" to appropriately display extended Unicode characters.

Note: The *Export* command exports only text; images are not included.

Supported Formats (Exporting)

Use the *Export* command to create a free-standing bibliography in any of the following formats:

Text File
The *Text File* export option is suitable for draft purposes or exporting references to be imported into another database.

RTF (Rich Text Format)
The RTF export is an ideal way to create a free-standing bibliography that can be edited or printed using a word processor. This format can be opened by all popular word processors and preserves font and text style information.

HTML
Documents exported in HTML (HyperText Markup Language), provide an easy way to post reference lists on the World Wide Web.

In your Web browser, set encoding to " Unicode-UTF 8" to appropriately display extended Unicode characters in the exported document.

XML
The XML option exports in a proprietary EndNote XML format.

Note: The *Export* command exports only text; images are not included. However, if you import the references back into an EndNote library, you can restore images by copying the figure files from the original library's .DATA folder into the .DATA folder for the new library.

Printing and Previewing References

Printing and Previewing References

To print references directly from EndNote, go to the File menu and select *Print* (Ctrl +P) to send a copy to your printer. Or, select *Print Preview* to format references onscreen. These are quick ways to view your

formatted references on paper or onscreen—no special page layout options are provided. Typical uses might include trying out various output styles, printing a list of references to take to the library with you, printing your notes, or generating a complete printout of the references in an EndNote library.

Important Points (Printing)

The currently active (topmost) window affects which references are printed with the *Print* command:

If a library window is displayed, you can print either the selected (highlighted) references or all references showing in the list.

If an individual reference is open for viewing, EndNote prints only that specific reference–as displayed on the screen with field labels. No output style is applied.

The *Sort References* command unselects any selected references, so use the *Show Selected References* command if necessary before sorting to retain the subset of references you selected.

In addition to the selected style, the appearance of the printed references is determined by the following items:

References will be printed in the order specified by the selected output style. If you want to change the sort order, you must modify the output style. If you want to export references in the order in which they are listed in the current Library window, change the output style's sort order setting to *Order of appearance*.

Each printed page has 1-inch margins, left-justified text, and a header that displays the library name in the upper left corner and the page number in the upper right corner. There are no options to customize the margins, headers or footers of the printouts. Use one of the other options for creating an independent bibliography if you need to modify these aspects of your printout.

The font and size of the printed references are determined by the General Display Font, if that font is a True Type font; otherwise a font substitution will be made. Choose *Preferences* from the *Edit* menu, and click the *Display Fonts* option to change the font and size if necessary. The double "T" to the left of the font name indicates a True Type font.

Choose *Page Setup* from the File menu to specify other printing options including the paper size and page orientation. Page setup options vary depending on the printer used.

Printing Instructions

To print a list of references directly from EndNote:

1. Make sure that all of the references you want to print are either selected (highlighted) or showing in the Library window.
2. From EndNote's Edit menu, go to the *Output Styles* submenu and choose a style (or use the style menu on the Main toolbar).
3. (Optional) References will be printed in the order specified by the selected output style. If you want to change the sort order, you must modify the output style:

a. From the Edit menu, choose *Output Styles* and then *Open Style Manager*.

b. Select the output style and click *Edit*.

c. In the left pane of the window, under *Bibliography*, select *Sort Order*.

d. Change the current sort order in the right pane. If you want to print references in the order in which they are listed in the current Library window, choose *Order of appearance*.

e. Close the output style and the style manager.

4. From the File menu, choose *Print* (Ctrl +P).

In the print dialog, specify the number of copies and the range of pages to print. By default, EndNote prints

only the selected references. To print all of the references showing in the Library window, change the print range option to *All*. n the "Print Selected References" option off. Depending on your printer software, you might need to choose *EndNote X4* from the popup list in the dialog in order to see the "Print Selected References" option. If no references are selected, this option is not available.

5. Click *Print* to print the references.

Previewing References

To preview a list of references onscreen:

1. Make sure that the references you want to print are listed in the Library window.

   You can select individual references and then select *Show Selected References* from the *References* menu.

2. If you would like to further limit the references to print, select (highlight) those references.
3. From EndNote's *Edit* menu, go to the *Output Styles* submenu and choose a style (or use the style menu on the Main toolbar).
4. (Optional) References will be displayed in the order specified by the selected output style. If you want to change the sort order, you must modify the output style:

   a. From the *Edit* menu, choose *Output Styles* and then *Open Style Manager*.

   b. Select the output style and click *Edit*.

   c. In the left pane of the window, under *Bibliography*, select *Sort Order*.

   d. Change the current sort order in the right pane. If you want to print references in the order in which they are listed in the current Library window, choose *Order of appearance*.

   e. Close the output style and the style manager.

5. From the *File* menu, choose *Print Preview* .

From the onscreen preview, you can click *Print* to send a copy to your printer.

Including Notes, Abstracts, Etc.

Including Notes, Abstracts, and Other Information in a Reference List

Most of the styles included with EndNote produce standard bibliographies without including additional information such as notes or abstracts. Two of EndNote's standard styles are the Annotated style and the Show All Fields style. The Annotated style includes the Abstract field after each reference, and the Show All Fields style lists all of the field names and the information found in those fields for each reference.

See Modifying Style Templates for information about editing and creating styles. These are two examples of common ways you might want to edit styles for your printouts or for stand-alone bibliographies: Creating Annotated Bibliographies and Printing Only the Notes.

Creating Annotated Bibliographies

To create a bibliography that includes abstracts, you can use the Annotated style included with EndNote. The Annotated style is based on the Author-Date style, and creates an alphabetical listing of the references (by author), with the abstract appended to each reference. You can modify any other style to include the Notes or Abstract field as well.

For this example, we modify the Numbered style to include the Abstract field.

1. From the Edit menu, choose *Output Styles* and select *Open Style Manager*.

2. Choose a style from the list in the Style Manager window, and click the *Edit* button. The Style window opens.
3. Choose *Layout* from the options under the *Bibliography* heading and click in the text box under the "End each reference with" heading. Text or fields inserted into this section appear at the end of each reference in the bibliography.
4. To insert the abstracts on a new line after each reference: choose ¶ *End of Paragraph* from the *Insert Field* list, and then choose *Abstract* from the same list.
5. From the File menu, choose *Save As* and give the style a new name, but keep the ". ENS" extension.

This annotated version of the style will appear in the *Output Styles* submenu of the *Edit* menu (and in the styles menu on the Main toolbar). If you format a paper, print, or export references using this style, the abstracts are included in the bibliography.

Printing Only the Notes

To print only the notes for each reference, create a new style that includes only the Notes field.

To create a style that prints only notes:

1. From the Edit menu choose *Output Styles* and select *New Style*.
2. Click on the *Templates* panel under the *Bibliography* heading.
3. Click in the "Generic" template and choose *Notes* from the *Insert Field* list. Press the Enter key to add a blank line after the notes for each reference.
4. From the File menu, choose *Save As*. Name and save the style. You should now see this new style in the *Output Styles* submenu of the *Edit* menu.
5. Close the style by clicking the close button.

Select this style whenever you want to print or export only the Notes from your references. This style is also useful to preview just the notes on the preview tab of the Library window.

Subject Bibliographies and Subject Lists

Overview of Subject Bibliographies

You can create subject bibliographies and subject lists.

Subject List	Subject Bibliography
Archaeology Astronomy Biology Geochemistry Geology Hydrology	**Archaeology** Parker, F. and B. J. Parker (1997). Educational Philanthropist George Peabody (1795-1869) and First U.S. Paleontology Professor Othniel Charles Marsh (1831-99) at Yale University. U.S., Tennessee. **Astronomy** Lowman, P. D., Jr. (2001). Evidence from Apollo. Science Teacher. 68: 22-25.

A general bibliography is a continuous listing of citations in a particular order. A subject bibliography is made up of smaller listings, each appearing under a distinct heading. Despite the name, a subject bibliography (or a subject list) can be based on any EndNote field or combination of fields.

Subject bibliographies have diverse uses, including: generating lists of journal abstracts; current awareness lists; subject indexes; or lists of holdings by category. Typical subject bibliography headings are by Keyword, Author, Journal Title, or Call Number.

You can print entire bibliographic citations, information from one or more fields, record IDs, or nothing at all under each heading.

Printing a Subject Bibliography

To print a subject bibliography:

1. In the current Library window, show only the references you wish to include in a subject bibliography.

   From the *References* menu, choose *Show All References* to include all references in the subject bibliography.

   Click on a Group name to display only the references in a specific group.

   From the Tools menu, choose *Search Library* to find a subset of references for your subject bibliography.

   Highlight individual references and then use the *Show Selected References* command to list those references for the subject bibliography.

2. Click in the reference list to make it the active pane.

3. Subject Bibliography to display a list of the EndNote fields by default field name.

4. Highlight the field(s) whose contents you wish to use as subject headings.

   The most common selection is the single Keywords field to create a subject bibliography.

   You can include any number of fields. If you build the list of headings from more than one field, the subject headings generated from these fields are combined into a single list.

If you mix date fields with other fields, dates will sort before alphabetic subject headings.

To quickly select all fields or clear all fields, use the buttons on the right side of the dialog. You can click on individual fields to select or deselect them.

5. Select the check boxes as needed to determine whether an entire field is used as a heading, or whether a field should be split into multiple headings.

List each author separately, when checked, will list each author name as a separate heading. If not checked, all authors from a single field will appear as a single heading.

In other fields, list each entry that is separated by slash, carriage return, or line feed, when checked, separates any non-author field into multiple subject headings.

Terms in the Keywords field are always listed as separate headings.

6. Click *OK* to display the terms found in the fields you selected.

7. Select those terms you wish to include as subject headings.

To quickly select all terms or clear all terms, use the buttons to the right of the dialog.

You may want to select all terms and then click to deselect the few terms you do not want included.

8. Click *OK* to format the subject bibliography on the screen.

If you want to modify the term selections you just set, to either add or remove terms from the selected field(s), click on the *Terms* button.

Note: Subject headings print as they appear in your records. No special formatting of author names and no journal title substitution is applied.

9. Click on the *Layout* button to modify the layout and style of your subject bibliography. Verify the settings on the References, Terms, Page Layout, and Bibliography Layout tabs, particularly these items on the References tab:

Output Style, which determines the bibliographic style used to format each reference.

Reference List Title, which prints at the top of the bibliography

Reference List Order, which determines the order of references under each subject heading

Use the Terms tab to set options specifically for subject headings. For a subject bibliography, it is important to select the *Subject Terms and Reference List* item.

Click *OK* to save changes to all of the Layout tabs.

10. Once your subject bibliography is set up the way you want it, you can do one of these:

Display a formatted page view by clicking *Print Preview*.

Print to your printer by clicking the *Print* button. A Print dialog will appear. Verify settings and click *OK* or *Print*.

Print to a disk file (Text, RTF, or HTML) by clicking the *Save* button. A dialog appears for you to name the file. Choose the file type, name and place the file, and click *Save*.

Note: In your Web browser, set encoding to " Unicode-UTF 8" to appropriately display extended Unicode characters in an exported HTML document.

11. *Close* the Subject Bibliography window when you are done viewing it.

Printing a Subject List

A subject list is a sorted list of unique terms (words or phrases) that occur in particular fields of the records you choose. You can base a subject list on any EndNote field or combination of fields.

To print a subject list:

1. Determine which references you want EndNote to use when building the subject list, and display only those references in the Library window.

   From the *References* menu, choose *Show All References* to include all references in the subject list.

   Click on a Group name to display only the references in a specific group.

   From the Tools menu, choose *Search Library* to find a subset of references for your subject list.

   Highlight individual references and then use the *Show Selected References* command to list those references for the subject list.

2. Click in the reference list to make it the active pane.

3. Subject Bibliography. A Subject Fields dialog appears, listing the EndNote fields by default field name.

4. Highlight the field(s) whose contents you wish to use as subject headings.

   You can include any number of fields.

   If you build the list from more than one field, the terms generated from the fields are combined into a single list.

   To quickly select all fields or clear all fields, use the buttons to the right of the dialog.

   Click on individual fields to select or deselect them.

5. Select the check boxes as needed to determine whether an entire field is used as a term, or whether a field should be split into multiple terms.

   List each author separately, when checked, will list each author name as a separate entry. If not checked, all authors from a single field will appear as a single entry.

   In other fields, list each entry that is separated by slash, carriage return, or line feed, when checked, separates any non-author field into multiple entries.

   Terms in the Keywords field are always listed as separate entries.

6. Click *OK* to display the terms found in the field(s) you selected.

7. Select the terms you want in the subject list.

   To quickly select all terms or clear all terms, use the buttons on the right side of the dialog.

   You may want to select all terms and then click to deselect the few terms you do not want included.

8. Click *OK* to display your subject list. If the window does not display a simple list of terms, you must modify settings on the Configure Subject Bibliography dialog as described next.

9. Click the *Layout* button to display the Configure Subject Bibliography dialog.

10. On the References tab, enter a Reference List Title, which will print at the top of the list.

When you print a subject list, the other settings on the Reference List tab are simply ignored. The output style is ignored because you are not printing formatted references, and the sort order set here applies only to formatted references. The sort order of terms is set on the Terms tab.

11. On the Terms tab:

    Reference List must be set to Subject Terms Only.

    Include may include Subject Term Counts and/or a List of Record IDs if you wish.

    Subject Term Layout can be set to print terms in Alphabetical or Term Count order and in Ascending or Descending order.

Do not include a *Prefix*, and include a caret-p (^p) as a *Suffix* so each term prints as a new paragraph on a new line.

Apply *Styles* as you wish. However, if you print to a text file all styles are stripped.

12. Click on the Page Layout tab if you wish to change the font, size, or page margins.

Note: The Bibliography Layout tab applies to subject bibliographies only, and does not affect a simple subject list.

13. Click *OK* to save changes to the dialog and update the list in the Subject Bibliography window.

If the window still does no t show the list you need, you can click on the Terms button to select or deselect terms from the selected field(s) or click Layout again to make more changes to the Configure Subject Bibliography dialog.

14. View, print or dismiss the list:

Click *Print Preview* to see a page layout view of the bibliography.

Click *Print* to print to a printer. The Print dialog appears. Verify settings and click *OK* or *Print*.

Click *Save* to print to a disk file. A file dialog appears for you to name the file. Choose the file type (text, RTF, or HTML), name the file, and click *Save*.

Click *Close* to dismiss the Subject Bibliography window and return to your record list.

Note: Terms are printed as they appear in your records. No special formatting of author names and no journal abbreviations are applied.

Subject Bibliography Settings

Subject Bibliography Settings

To access subject bibliography settings, first generate a subject bibliography from the Tools menu. Once the subject bibliography or subject list is displayed, a *Layout* button becomes available. When you click the *Layout* button, these tabs are available:

The References Tab
The Terms Tab
The Page Layout Tab
The Bibliography Layout Tab

Note: Some subject bibliography settings are updated from the current output style, so changes you make are not saved for future subject bibliographies. If you have special settings that you want to always use for subject bibliographies, it may be easier to copy and modify an output style specifically for generating subject bibliographies.

The References Tab

When you select *Subject Bibliography* from the Tools menu to format a subject bibliography or subject list, a *Layout* button is available to display a Configure Subject Bibliography dialog and change settings. This topic describes the References tab available on that dialog.

Output Style: Use the drop-down list to select an output style from the list or to *Select Another Style* that does not currently appear in the list.

If you opt to *Select Another Style*, EndNote will display the Choose a Style window, where you can choose from over 4,500 output styles. Use the *Find by* button to narrow the list of output styles by discipline. Select a style in the list and click *Choose*.

Note: EndNote includes more than 4,500 individual bibliographic styles. By default, the 100 most popular styles are stored as individual files in the Styles folder in your EndNote folder. To install additional styles, see Installing Additional Output Styles.

The output style is used to format the references in a subject bibliography. This setting is ignored for a subject list.

Reference List Title: Type a title in the text box to print at the top of your subject list or subject bibliography. To apply character styles to the Reference List Title, select the text and use keyboard shortcuts.

Bold	Ctrl +B
Italics	Ctrl +I
Underlining	Ctrl +U

Bibliography Sort Order: Click on a button to select the sort order you wish to use for the formatted references printed under each subject heading in a subject bibliography. This setting is ignored for a subject list.

The Terms Tab

When you select *Subject Bibliography* from the Tools menu to format a subject bibliography or subject list, a *Layout* button is available to display a Configure Subject Bibliography dialog and change settings. This topic describes the Terms tab available on that dialog.

Selecting a Subject List or Subject Bibliography

In the Reference List area of the Terms tab, select one of the two radio buttons:

Subject Terms Only prints each unique subject term. It does NOT print formatted references below each term.

Subject Terms and Reference List prints each subject term with related references listed below it.

Note: The options on this tab are saved for this subject bibliography session and for future sessions, until you change them again. So, if you generate a list of Subject Terms Only, the next time you choose *Subject Bibliography*, you will produce a simple subject list again. To include formatted references, click the *Layout* button and the Terms tab to select Subject Terms and Reference List.

When printing subject terms with reference lists, EndNote typically prints each unique subject heading only once with the related references listed below. You can select the Repeating Subject Terms box to print a subject term before each formatted reference. For example:

American Museum of Natural History

1. Personalities in Paleontology. 2002, American Museum of Natural History.

Antarctica

2. Quilty, P.G., Cycleryon glaessner (crustacea, decapoda) from the jurassic of Ellsworth Land, Antarctica. Journal of Paleontology, 2000. 62(4): p. 619.

Antarctica

3. Whitney, J.R., T.V. Billoski, and V.R. Jones, Evidence for Triceratops in Antarctica, in New Directions in Paleontology, T.V. Billoski, Editor. 1997, Academic Press: New York. P. 24-27.

Select the Recycling Reference Numbers box to restart reference numbering for each subject heading. For example:

Recycling Reference Numbers	Continuous Reference Numbers
Heading Number One	*Heading Number One*
1. First formatted reference	1. First formatted reference
2. Second formatted reference	2. Second formatted reference
Heading Number Two	*Heading Number Two*
1. First formatted reference	3. First formatted reference
2. Second formatted reference	4. Second formatted reference

Including Subject Term Counts or Record IDs

In the Include area of the Terms tab you can check a box to include, for the records selected for output:

Subject Term Counts prints a number next to the subject term to indicate how many records contain the term. For example:

Evolution (1)
Excavation (4)
Extinction (12)

Subject Term Counts always print on the same line as the subject term, surrounded by parentheses, and separated from the term by three spaces.

List of Record IDs prints the record IDs of the records that contain the term. You can print the list of record IDs on the same line as the subject term (set apart by three spaces) or on the next line. For example:

Excavation 34, 33, 6, 48
Extinction 34, 46, 6, 48, 96, 98, 10, 125, 132, 148, 162, 11

or

```
Excavation
    34, 33, 6, 48
Extinction
    34, 46, 6, 48, 96, 98, 10, 125, 132, 148, 162, 11
```

When you print these items on the same line as the term, they are always separated by three spaces. That way, you can save to a word processor file, replace the three spaces by a tab character, and convert the text to a table, using the tab as a separator. You can print both term counts and record IDs:

```
Excavation (4)
    34, 33, 6, 48
Extinction (12)
    34, 46, 6, 48, 96, 98, 10, 125, 132, 148, 162, 11
```

Sorting the Subject Terms

You have four options for ordering your subject terms:

By Term - Alphabetical sorts subject terms by Date for date fields, and then alphanumeric order (1-9, A-Z) for all other fields.

By Term - Inverse Alphabetical simply reverses the By Term - Alphabetical order (Z-A, 9-1, Dates).

By Term Count - Ascending lists terms based on how often they appear in records. For example, a term that appears in only one reference would display at the top of the list, whereas a term used in 20 references would appear further down in the list.

By Term Count - Descending reverses the By Term Count - Ascending order, so the most-used terms are listed first.

Note: This sort order setting affects subject headings only. If you want to change the order of the references printed below each heading, do so on the References tab of the Configure Subject Bibliography dialog.

Inserting Space or Text Around Subject Terms

Use the Prefix and Suffix text boxes to print text or punctuation before or after each subject term.

Each term may include a subject term count and/or a list of record IDs. The order of output is:

Text Before | Subject Term | Subject Term Count |
List of Record IDs | Text After | Reference List

You can use these special formatting codes in the text boxes:

New Paragraph:	^P
New Line:	^ L
Tab:	^ T
Bold:	Ctrl +B
Italics:	Ctrl +I
Underlining:	Ctrl +U

By default, the Prefix box contains "^p" and the Suffix box contains "^ p^p" in order to leave blank lines between each subject heading and the first citation listed below it.

When you print Subject Terms Only, you will probably want to print only a single "^p" after each term, so each subject term begins on a new line with no blank lines between them.

Applying Styles

In the Styles area of the Terms tab, check the appropriate boxes to separately apply styles to Subject Terms, Subject Term Counts, and the List of Record IDs. You can combine styles in any way, such as:

Antarctica *(2)* **144, 12**

1. Quilty, P.G., *Cycleryon glaessner (crustacea, decapoda) from the jurassic of Ellsworth Land, Antarctica*. Journal of Paleontology, 2000. 62(4): p. 619.

2. Whitney, J.R., T.V. Billoski, and V.R. Jones, *Evidence for Triceratops in Antarctica, in New Directions in Paleontology*, T.V. Billoski, Editor. 1997, Academic Press: New York. P. 24-27.

Apply styles to bibliographic references by modifying the output style.

If you save your list to a text file, all styles will be stripped.

The Page Layout Tab

When you select *Subject Bibliography* from the Tools menu to format a subject bibliography or subject list, a *Layout* button is available to display a Configure Subject Bibliography dialog and change settings. This topic describes the Page Layout tab available on that dialog.

Select the Default Font and Size: Use the drop-down lists to select a default font and size for your subject headings or subject terms. Font and size for bibliographic references are set in the output style.

Set Margins: Enter your page margins in inches.

Position Page Numbers: Use the check boxes to determine whether your pages are numbered and whether to suppress the first page number. Use the drop-down lists to determine location and alignment of page numbers.

The Bibliography Layout Tab

When you select *Subject Bibliography* from the Tools menu to format a subject bibliography or subject list, a *Layout* button is available to display a Configure Subject Bibliography dialog and change settings. This topic describes the Bibliography Layout tab available on that dialog.

The options available on the Bibliography Layout tab affect only the bibliographic references printed in a subject bibliography. These settings are not used when you print a simple subject list.

Note: When you select an output style, the settings on this tab change to reflect the settings found in the output style. You can override those settings for this session, but changes to this tab are not saved after you close the subject bibliography window. If you want to make the changes permanent, edit the output style. You can make a copy of the output style to edit specifically for subject bibliographies.

Starting and Ending Each Reference with a Special Character or Text

Use the *Start each reference with* and the *End each reference with* text boxes to enter fields, text, or punctuation to print before and after every formatted reference.

Simply click in one of the text boxes and type text. You can use the *Insert Field* button to enter control characters or fields of information as described below.

Use one of the *Insert Field* buttons to insert these control characters in a text box:

End of Paragraph inserts a paragraph marker, which moves the following text to the next line.

Tab inserts a tab character. The spacing for tabs is determined by the ruler settings in your word processor.

Forced Separation inserts a vertical bar. Use vertical bars to attach punctuation to a specific field, so that if the field is empty the punctuation will not print.

For example, to include the text "Note: " before the note field, first insert a vertical bar, type the text "Note: ", insert the Notes field, then insert another vertical bar. Your "Notes: " text will print only when a Notes field contains information, and not when it is empty.

Link Adjacent Text keeps text together so that it will not be broken between lines or pages.

Singular/Plural changes between the singular and plural version of a word, such as editor versus editors.

Enter these fields of information in the *Start each reference with* box by clicking the *Insert Field* button and selecting the field name:

Reference Type prints the Reference Type (such as Journal Article or Book) of each reference.

Label prints the label field from each reference.

Citation prints the in-text citation form of each reference.

Bibliography Number prints the sequential number assigned to the reference in the sorted list below each heading.

Record Number prints the unique EndNote record number from each reference.

Enter these fields of information in the *End each reference with* box by clicking the *Insert Field* button and selecting the field name:

Label prints the Label field from each reference.

Keywords prints the entire Keywords field for each reference.

Abstract prints the Abstract field from each reference.

Notes prints the Notes field from each reference.

Record Number prints the unique EndNote record number from each reference.

Setting a Hanging Indent

Use the drop-down list to apply a hanging indent to paragraphs in each formatted reference.

Numbering References

Enter a starting reference number for bibliographic references printing below each heading. This setting is ignored if reference numbering is not applied from the current output style.

Examples of Subject Bibliographies

Using Author Names as Subject Headings

This example uses author names as subject headings. The *List each author separately* box was checked on the Subject Fields dialog, so that single author names are used for headings rather than entire author fields. Uppercasing was applied to the Subject Terms.

BAKER, V.R.

1. V. R. Baker, *Geological Society of America Bulletin*, 100, 1157 (1988).

BARLOW, CONNIE

2. C. Barlow, *Natural History* 110, 62 (Sept., 2001).

BARNES, C.R.

3. C. R. Barnes, *Geological Magazine* 125, 381 (1988).

Using Keywords as Subject Headings

This example uses keywords as subject headings, and restarts reference numbering after each subject heading. You would select Recycle Numbering in the Configure Subject Bibliography dialog on the Terms tab. The starting reference number is set on the Bibliography Layout tab.

Geochemistry

1. J. A. Izbicki, *Dissertation Abstracts International*, 61,
2957 (2000).

2. C. Megnien, *Bulletin d'Information des Geologues du Bassin de Paris*, 37, 142 (June, 2000).

Geology

1. S. A. Lebedev, Ph.D., Princeton University (2000).

Using Call Numbers as Subject Headings

You can create a two-column output with Call Numbers, such as:

DL312	Forbes, C. S. (1860). Iceland: Its volcanoes, geysers, and glaciers. London, J. Murray.

To create a two-column output:

1. In the Subject Fields dialog, select the *Call Number* field.
2. Select an output style that does not number citations.
3. On the Layout/Terms tab:

   Select Subject Terms and Reference List with Repeating Subject Terms.

   Do not include Subject Term Counts or a list of Record IDs.

   Insert a tab between each subject heading and reference with the Suffix box (insert ^ t).

4. Save the subject bibliography to a word processor file.

5. With your word processor, convert the output to a two-column table, sort by the first column, adjust the column widths, and reformat the paragraph style.

Reference Types

About Reference Types

Your EndNote library can contain references from a variety of different sources, such as books, journal articles, and newspaper articles. We call these different sources **reference types**. EndNote provides built-in forms for these and other common reference types.

In addition to an all-encompassing "Generic" reference type, EndNote has three unused and 44 pre-defined reference types: Aggregated Database, Ancient Text, Artwork, Audiovisual Material, Bill, Blog, Book, Book Section, Case, Catalog, Chart or Table, Classical Work, Computer Program, Conference Paper, Conference Proceedings, Dictionary, Edited Book, Electronic Article, Electronic Book, Encyclopedia, Equation, Figure, Film or Broadcast, Government Document, Grant, Hearing, Journal Article, Legal Rule or Regulation, Magazine Article, Manuscript, Map, Newspaper Article, Online Database, Online Multimedia, Pamphlet, Patent, Personal Communication, Report, Serial, Standard, Statute, Thesis, Unpublished Work, and Web Page. See the List of Reference Types.

Important Points About Reference Types

You can assign a particular reference type to each reference entered into your library.

The Reference Types preference, accessible through EndNote's Preferences, determines which fields are available for each of the different reference types.

The Reference Types preference allows up to 48 different types of references, each capable of supporting up to 54 fields (including the name of the reference type).

Of the 48 reference types, all but the Generic type can be modified.

Use the Reference Types preference to add, delete, or rename fields. You can also add or hide complete reference types.

The layout of the Generic reference type should be used as a guide when modifying or creating reference types. *Rows reserved for Authors should be used only for names.*

Changes made to the Reference Types preference apply to all libraries opened under the current user account.

If you move your library to a different computer, your references will follow the layout of the Reference Types preference for the current user account on that computer, unless you also transfer a copy of your reference type table. See Sharing Your Reference Type Table.

Do not enter reference data into the Reference Types preference. This dialog is designed to store just the names of the reference fields.

When you use Cite While You Write to insert figures in Microsoft Word, figures found in the Chart or Table reference type are inserted as tables. Figures found in any other reference type in EndNote will format as figures in Word.

Reference Types and Data Entry

The chosen reference type specifies which fields appear in the Reference window. For instance, an EndNote journal article reference includes the fields "Journal," "Volume," and "Issue," while a book reference includes fields such as "Publisher" and "City." The Reference window only displays the fields that are relevant to the chosen reference type.

It is best to select the reference type before entering the bibliographic information in a reference. However, you can change the reference type of a reference at any time using the *Reference Type* list at the top of the Reference window.

Relationship Between Reference Types and Styles, Filters, and Connections

Styles, filters, and connection files can include templates for all of the different reference types. This enables various types of references to be formatted differently in a bibliography or imported differently, as necessary.

The reference types and fields available to you when editing a style, filter, or connection file depend on how the reference types are configured in the Reference Types preference. These files update automatically to reflect changes made in the Reference Types preference (such as changing the name of a field).

Setting a Default Reference Type

By default, the Journal Article reference type appears when you insert a new reference. While you can change the assigned reference type during data entry, you may want to change the default setting

To change the default reference type setting:

1. From the Edit menu, choose *Preferences*.
2. Click on Reference Types.
3. Click the Default Reference Type list and choose from one of the available reference types.
4. Click *Apply* to save the change.

The Generic Reference Type

When entering references into your library, use the Generic type only for references that do not fit any of the other reference types. The more important function of the Generic reference type is to set up a guide for the other reference types to follow.

The Generic field names are used throughout the EndNote program (for example, in the Sort References dialog and the Search tab) to refer to a similar category of fields that can be found in the different reference types. When you choose a Generic field name in any of these dialogs, it refers to all field names assigned to that Generic row of the Reference Types preference. For example, if you use the *Search* command to search the Author field, EndNote searches all fields that appear in the Generic "Author" row of the Reference Types preference, including fields such as "Artist," "Reporter," and "Cartographer."

Note: When editing the Reference Types preference it is important that you keep similar fields in the same row, as defined by the Generic field names at the start of the row. Each reference type can call these fields by a different name; however, the content of the fields should be similar.

Using the Generic Type in Styles

Although the Generic reference type is rarely used for data entry, it plays an important role in formatting bibliographies. In addition to formatting Generic references, the Generic template in a style is used to format any reference types that are not specifically defined in the style. Consequently, every bibliographic style should contain a Generic template so that all references get formatted when EndNote creates a bibliography.

Special Fields

EndNote includes 54 fields (including the first field, which contains the name of the reference type). Each of the different EndNote data fields is available for use by the different reference types. Initially, only the Generic reference type includes all fields. Few restrictions are placed on the type of text that can be entered. However, there are a few fields that are reserved for specific functions.

Author Fields

The Author, Secondary Author, Tertiary Author, and Subsidiary Author rows in the Reference Types preference are specially configured to handle author names, and should not be used for any data other than names.

When EndNote creates a bibliography, the information in these fields is formatted according to the specifications of the selected style's *Author List* and *Editor List* settings. (The *Author List* is used for the Author field; *Editor List* is used for Secondary Author, Tertiary Author, and Subsidiary Author fields.) If you put text other than personal names in any of these fields, EndNote will still try to interpret it and format it as a person's name.

The Library window displays the last name of the first author that it finds in the Author field. That name is also used in the temporary citations inserted into word processing documents.

Note: If you have a corporate author name in an Author field, put a comma after the name so that EndNote does not interpret it as a first and last name. For example, Acme Corporation should be entered as "Acme Corporation,".

Title Fields

The three fields that the Generic type uses for titles—Title, Secondary Title, and Tertiary Title—are usually found under different names in other reference types. For example, a section of a book which is part of a series will use all three title fields: the chapter title would belong in the main Title field, the book title corresponds to the Secondary Title field, and the series title corresponds to the Tertiary Title field.

The Generic Secondary Title and Alternate Title fields map to the Journal and Alternate Journal fields, respectively. The fields listed below, found in specific reference types, are the only ones that can be used with the Journals term list to modify journal names in formatted bibliographies.

Journal Article reference type—Journal field

Journal Article reference type—Alternate Journal field

Electronic Article reference type—Periodical Title field

Pages Field

The fields in the row reserved for page numbers are the only ones that work with the *Page Numbers* option in the styles. This feature lets you specify how EndNote should format the page numbers in the bibliography (first page only or a full or abbreviated range of pages). Similarly, any field in the Pages row of the Reference Types preference can take advantage of a special formatting character in the styles: the caret (^). This character allows you to pick a singular and plural form of a term to precede or follow the pages in a bibliography, for example "p. 25" and " pp. 32-45". If you enter page numbers in any other part of the reference, they cannot be used with these features.

URL Field

When a correctly formatted URL is entered into this field, the *Open URL* command in the References menu can be used to launch your Web browser and take you to that site.

When a reference is selected and *Open URL* is chosen, EndNote checks the URL field for a URL. No other fields are checked. See URL and Linking a URL to an EndNote Reference.

File Attachments Field

Use the File Attachments field to store the path to files on your hard drive (such as graphics, word processing documents, and PDF files). You can specify an absolute path to a specific folder, or you can specify a relative path to copy the file to your library's . DATA\PDF folder. You can link up to 45 files to each reference.

When a correctly formatted path and filename is entered into this field, the *Open File* command in the References menu can be used to open the file. See Linking a File to an EndNote Reference.

Figure Field

The Figure field stores a single graphic or file attachment specifically for use in Microsoft Word. This field is included in all reference types. See Inserting Figures for information about adding figures to a reference.

To add or remove the Figure field from a reference type, use the Preferences dialog to edit reference types, as described in Adding, Deleting, and Renaming Fields.

Use the text field immediately following the Figure field, the Caption field, to enter relevant information pertaining to the image or file.

Date Stamp Fields

Two Auto Date Stamp fields appear in the footer of each EndNote reference. The Added to Library and Last Updated dates are inserted when you save a new reference, and then the Last Updated date is reset each time you save changes to a reference. The date format of the Auto Date Stamp fields, such as “9/16/2008,” adheres to your default operating system settings.

You cannot remove or edit either of the Auto Date Stamp fields; they do not appear in the list for editing. However, you can display, search, sort, print, or export these fields just as you would any other EndNote field.

Customizing Reference Types

All of the reference types, except for Generic, can be modified using the Reference Types preference. Whenever you make a change to a reference type, you should also edit your styles to make sure that they correctly format the new or modified reference types.

If you plan to share your libraries with other users, you may want to limit the use of new and modified reference types.

> The Reference Types table applies to all libraries opened on a computer from your user account.
>
> If your library is opened from a different computer or a different user account, your references will follow the layout of the Reference Types preference for that computer and user, unless you also transfer a copy of your reference type table. See Sharing Your Reference Type Table.
>
> If you modify a reference type for records in your EndNote library, you should make sure that the reference type is also created or modified on other computers that will access the library.

Do not try to edit the Reference Types preference to rearrange information within your references. For example, if you delete the "Journal" field and retype "Journal" elsewhere in the column for Journal Articles, you are simply telling EndNote to close the original "Journal" field and display a new field called "Journal" in another location—this does not move your data from the original "Journal" field to the new one. Any references that had data in the original "Journal" field will still show that information, but the field will have its "Generic" name of "Secondary Title." The new "Journal" field will remain empty.

These topics can guide you in editing reference types:

> About Reference Types
> List of Predefined Reference Types
> The Generic Type
> Special Fields
> The Reference Types Preference
> Adding and Deleting Reference Types
> Adding, Deleting, and Renaming Fields
> Sharing Your Reference Type Table

The Reference Types Preference

The Reference Types preference displays the available reference types and the fields that each reference type contains. Use the Reference Types preference to add, remove, or rename fields—or to rename a reference type.

To access the Reference Types preference:

1. From the Edit menu, choose *Preferences*.
2. Click the *Reference Types* option in the list of preferences.
3. Click the *Modify Reference Types* button and the Reference Types preference will open.
4. Use the drop-down list at the top to display one of the 48 reference types in the right-hand column.

The first column of the Reference Types preference is reserved for the **Generic** reference type, which lists all of the available fields.

The rows correspond to the editable fields that each reference type can contain (including the name of the reference type). Each named cell in a column represents a field that appears in the reference. The names of the fields in each reference type should closely correspond to their Generic field names in the left column.

The Generic column is the complete set of fields that can be included in any type of reference—no fields can be added to this list, nor can the names of the Generic fields be changed. The Generic reference type serves as a model for constructing all other reference types.

Navigating in the Reference Types Dialog

Use the vertical scroll bar to see the additional fields available for each reference type.

The Up or Down Arrow keys select the previous or next field, respectively, within the same reference type.

Pressing Enter closes the dialog.

Press the Esc key or click *Cancel* to exit from the Reference Types preference without saving any changes.

Adding and Deleting Reference Types

There are three Reference Types titled Unused, where you can define a new type of reference. If these are already in use, you can overwrite other reference types that you do not need in order to create new reference types. For example, if your subject area never involves art, you may have no use for the Artwork reference type; you could replace it with another reference type.

To add a new reference type:

1. From the Edit menu, choose *Preferences*, select the *Reference Type* option in the list of preferences, and click *Modify Reference Types* to open the Reference Types preference.
2. Use the drop-down list at the top to select one of the Unused reference types. If all of the "Unused" reference types are in use, select a reference type that you are willing to overwrite.
3. Type a name for that new reference type into the column heading

   .**Note**: A reference type must have fields defined in order to appear in the reference type list for new or existing references. If you simply change the name of an Unused reference type, it will not appear in your reference type list. You must also include fields in the reference type as described next.
4. Continue down the column for that reference type, adding new fields as necessary. (Delete or rename unwanted fields if you are overwriting another reference type.) Remember to match the meaning of the fields you add with the Generic row headings. It is often helpful to use the other reference types as guides, too.
5. Click *OK* after you have added all of the necessary fields, and you will return to the main Preferences window for Reference Types.

6. Click *OK Save* to save your changes.

You can now use this new reference type when entering references. You should also edit your styles so that they correctly reflect the type of format required for this new reference type. If you overwrite an existing reference type, any references that used the old reference type will change to use the new reference type.

Note: If you ever plan to use journal articles in your library, do not overwrite the Journal Article or Electronic Article reference types. These two reference types are the only ones for which Journal Abbreviation replacements can be made with the Journals Term List.

To hide an unwanted reference type:

1. From the Edit menu, choose *Preferences*, select the *Reference Type* option in the list of preferences, and click *Modify Reference Types* to open the Reference Types preference.
2. Use the drop-down list at the top to find the reference type that you want to hide.
3. Add a period before the reference type's name in the column header to have EndNote remove that item from the *Reference Type* list in the Reference windows and elsewhere. The definition, however, remains in case you later wish to restore it by removing the period.

   For example, if you were hiding the Map reference type, the column heading would be ".Map".
4. Click *OK* to return to the main Preferences window for Reference Types.
5. Click *OK Save* to save your changes.

Once you have hidden a reference type, you should not select it under Preferences as the default reference type for new references; if you do, EndNote will default to the Generic reference type.

Adding, Deleting, and Renaming Fields

There are different ways you can customize the various reference types. If an existing reference type does not contain all of the fields that you need, you can define a new field or rename an existing field. Similarly, if there is a field that you know you will never use, you can delete it from the reference type so that it no longer appears in your references.

Note: Be sure to read about Special Fields before changing any fields.

To rename a field:

1. From the Edit menu, choose *Preferences*, select the *Reference Type* option in the list of preferences, and click *Modify Reference Types* to open the Reference Types preference.
2. Use the drop-down list at the top to find the reference type that you want to change.
3. Within the column for that reference type, find the field name that you want to change, click on it, and type a new name for the field to replace the current name.
4. (Optional) If you want to change the field for all reference types, click the *Apply to All Ref Types* button.
5. Click *OK* to return to the main Preferences window for Reference Types.
6. Click *OK Save* to save your changes.

Styles, filters, and connection files update automatically to use the new name.

To add a field to a reference type:

1. From the Edit menu, choose *Preferences*, select the *Reference Type* option in the list of preferences, and click *Modify Reference Types* to open the Reference Types preference.

2. Use the drop-down list at the top to find the reference type that you want to change.
3. Look at the field names listed in the Generic column and find the one with the most similar meaning to the field that you want to add. Make sure that the corresponding cell is blank for the reference type that you are modifying. If it is not blank, then you should use another field.
4. Click in the blank cell and type the name for the new field.
5. (Optional) If you want to add the new field to all reference types, click the *Apply to All Ref Types* button.
6. Click *OK* to return to the main Preferences window for Reference Types.
7. Click *OK Save* to save your changes.

To delete a field from a reference type:

1. From the Edit menu, choose *Preferences*, select the *Reference Type* option in the list of preferences, and click *Modify Reference Types* to open the Reference Types preference.
2. Use the drop-down list at the top to find the reference type that you want to change.
3. Find the name of the field you want to delete and select it.
4. Press the Delete or Backspace key to clear that field name.
5. (Optional) If you want to delete the field from all reference types, click the *Apply to All Ref Types* button.
6. Click *OK* to return to the main Preferences window for Reference Types.
7. Click *OK Save* to save your changes.

The deleted field no longer appears in any references using that reference type. However, if there was any information in the deleted field, it still appears in the reference, but the field is displayed with its Generic name. For example, suppose you remove the Editor field from the Book reference type. Thereafter, when you add new book references to your library, there will be no available field for entering an editor. However, if you edit an old book reference, one in which you had entered an editor's name, the name will be displayed in the field titled Secondary Author. It is the same Editor field that was used originally, however it is now displayed with its Generic name.

Data in a field is not deleted by deleting a field from a reference type format. To remove all text from a field, use the "Clear Field" option in the *Change Field* command. You can also move data from one field to another using the *Move Field* command on the *References* menu.

Sharing Your Reference Type Table

An EndNote user can share a customized reference type table with another EndNote user. Keep in mind, however, that when you do this, you completely replace the recipient's existing reference type table.

First, export the reference type table you wish to share:

1. From the donor's user account, start EndNote.
2. From the Edit menu, choose *Preferences*.
3. Click the Reference Types option in the list of preferences.
4. Under Reference Type Table, click *Export* to display a file dialog.
5. Name the file, select a folder where you will be able to find it later, and click *Save*. EndNote will append an . xml suffix to the file name.
6. Copy the exported . xml file to the recipient's computer.

Then, import the table for a different user:

Note: Replacing another user's reference type table overwrites all changes to his/her current reference type table.

1. From the recipient's user account, start EndNote.
2. From the Edit menu, choose *Preferences*.
3. Click the Reference Types option in the list of preferences.
4. Under Reference Type Table, click *Import* to display a file dialog.
5. In the file dialog, locate, highlight, and *Open* the . xml file that was previously exported.

Table of Predefined Reference Types

Use the List of Reference Types to display individual reference types and the default fields and field names used in each one.

Bibliographic Styles

Introduction

What is an Output Style?

The term **output style** (or just "style") is used to describe a particular method of documenting your work. Each style is designed as a complete solution for formatting in-text citations, footnote citations, and bibliographies for all types of references.

You can think of styles as templates that show EndNote how to arrange the information in each of your EndNote references for citations and bibliographies. For example, a single reference could be formatted in the Chicago style like this:

> Argus, Michele V., and Edward K. Matthews. 1991. Stratigraphic excavation techniques for paleontologists. *Journal of Paleontology* 17:119-127.

Or it could be formatted in the Nature style like this:

1. Argus, M. V. & Matthews, E. K. Stratigraphic excavation techniques for paleontologists. *Journal of Paleontology* **17**, 119-127 (1991).

EndNote includes more than 4,500 individual bibliographic styles. The 100 most popular styles are stored as an individual files in the Styles folder in your EndNote folder. (To add more, see Installing Additional Output Styles.)

The name of the style refers to the journal or publisher that has defined the bibliographic format. The Nature style, for example, is based on the format required by the journal Nature, and the Chicago style is named after the Chicago Manual of Style. Styles in the Export category, such as "RIS" are not bibliographic styles, but rather export styles designed to aid in transferring EndNote data into other databases.

To see the available styles in EndNote's Styles folder, choose *Output Styles* from the *Edit* menu, and select *Open Style Manager*. If your style is not available, you can download additional styles, any style can be modified to suit your needs, plus you can create new styles.

> Styles can be downloaded or edited, and new styles can be customized, with EndNote's Style Manager.
>
> The Style Manager allows you to find and preview installed styles. Commonly used styles can be marked as "favorites," which will appear in the *Output Styles* submenu of the *Edit* menu and in the list of available styles in Cite While You Write.

The Output Styles Menu

The style selected in the Output Styles submenu of the Edit menu (or the style menu on the toolbar) determines how references are formatted for the preview in the Library window as well as for the *Format Bibliography*, *Format, Print*, *Export*, and *Copy Formatted* commands.

By default, EndNote's four standard bibliographic styles are installed in your Output Styles menu:

> **Annotated:** generates an Author-Date style bibliography with abstracts.
>
> **Author-Date:** generates bibliography alphabetized by author name, and in-text citations with Author and Year.
>
> **Numbered:** generates a numbered bibliography with corresponding numbered in-text citations.
>
> **Show All Fields:** generates a list of the references as entered, including all fields and the names of the fields.

Mark individual styles as your favorites in the Style Manager to have them appear in the Output Styles menu, the style menu in the Main toolbar, and the confirm formatting dialog.

The Style Manager

EndNote includes more than 4,500 individual bibliographic styles. By default, the 100 most popular styles are stored as individual files in the Styles folder in your EndNote folder. To install additional styles, see Installing Additional Output Styles.

The name of the style refers to the journal or publisher that has defined the bibliographic format. The Nature style, for example, is based on the format required by the journal *Nature*, and the Chicago style is named after the *Chicago Manual of Style*. Styles in the Export category, such as "RIS" are not bibliographic styles, but rather export styles designed to aid in transferring EndNote data into other databases.

To see if your journal's style is included in EndNote, peruse the list of styles in the Style Manager. If your style is not available, any style can be modified to suit your needs and you can create new styles.

To see the available styles in EndNote's Styles folder, choose *Output Styles* from the Edit menu, and select *Open Style Manager.*

The Style Manager lists the names of the original styles available in the Program Files\EndNote X4 \Styles folder as well as any new or modified styles in your personal Styles folder, and gives you the options to edit them or select them as "favorites" for quick access from the style menu on the toolbar, the *Output Styles* menu on the *Edit* menu, or the confirm formatting dialog. You can click and drag the corner of the dialog to increase the size.

Navigating in the Style Manager

Use the following features to locate the output style that you want to use:

If you know the name of the style that you want to use, you may start typing it and the first file that matches what you type will be selected.

Type text into the Quick Search text box on the toolbar and press Enter to search for the style by the name of the file. You can enter a partial name or the full name. EndNote will display all matching results.

Click the *Find by* button and choose a category (such as Medicine or Humanities) to find only the bibliographic styles for a specific discipline.

Click the *Find by* button and choose *All Styles* to return all of the styles to the displayed list.

Click the column headings to sort the styles by name or by category. Clicking the same column heading a second time will change the sort order from ascending to descending. Click again to set it back to ascending order.

Click the *More Info* button at the bottom of the dialog to display additional information about the selected style (such as modification and creation dates, and any comments or limitations). *More Info* toggles with *Less Info*. You also have the option of displaying a preview of the style in the "More Info" panel.

Marking Your Favorite Styles

When you have found a style that you will want to use in the future, click the check box to the left of it to mark it as a favorite. All styles that are marked as favorites appear in the Output Styles submenu of the Edit menu, and the styles menu on the toolbar. This gives you easy access to the styles you use most often. All styles can be modified to meet your specifications. You can also create completely new styles if necessary.

To add a style to the *Output Styles* submenu on the *Edit* menu:

1. Output Styles and select *Open Style Manager*.
2. Find the style that you need.
3. Click in the box to the left of the style's name to choose it as one of your favorites.

4. Close the Style Manager by clicking the close button or choosing *Close Style Manager* from the File menu.

To select a whole category of styles as favorites, click the *Find by* button in the Style Manager window, select the category of interest, and then click *Mark All* when all of the styles for that category are displayed. Click the *Find by* button and choose *All Styles* to bring all of the styles back into view. The *Unmark All* button may be used to unmark all of the output styles that are showing in the list.

If you cannot find the style you need:

Many bibliographic styles are simply variants of a small number of well-known bibliographic formats. EndNote includes over 4,500 different styles, but it may not include the exact style you need. If you can't find the specific style you need, you can:

Check the submission guidelines for the publication to see if the style is a derivative of a well-known style. You may be able to use that style (perhaps with minor modifications).

Try the interactive Styles Finder on the EndNote web site. A shortcut to the *Web Styles Finder* is provided on the *Help* menu.

Installing Additional Output Styles

The EndNote team has developed over 4,500 different output styles. Because installing all of these styles can slow performance, a typical EndNote installation includes only the 100 most popular styles. You can install sets of styles by discipline with the EndNote installer , or you can download individual styles from the EndNote Web site.

Using the EndNote installer to install additional output styles

First, make sure EndNote is closed and not running. You can run the EndNote installation program again, choose the option to *Modify* the installation, and then select sets of output styles to install.

To install sets of output styles:

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. Do one of these:

   Start the EndNote installation program as you would for a new installation.

   Or, from the Windows Start menu, select *Control Panel,* or choose *Settings* and then *Control Panel*. Then, choose *Add or Remove Programs*. In the list, click EndNote X4 and then *Change*.
3. On the “Application Maintenance” dialog, select the *Modify* option and click *Next*.
4. On the “Select Features” dialog, click the plus sign (+) next to Additional Styles.
5. For each set of styles you would like to install, click the triangle and select either "Will be installed on local hard drive" or "Entire feature will be installed on local hard drive."
6. Click *Next* to continue with the installation.

The styles will be copied to the EndNote Styles folder, which is typically Program Files\EndNote X4\Styles, and the new files will be available for use the next time you start EndNote.

Finding individual output styles on the EndNote Web site

You can use the Style Manager in EndNote to find and download individual output styles.

To download individual output styles:

1. From the *Edit* menu in EndNote, choose *Output Styles* and then *Open Style Manager*.

2. Click *Get More on the Web* to start your default browser and go to the appropriate page on the EndNote Web site.

Note: Another way to direct your browser to this web page is to select *Web Styles Finder* from the *Help* menu.

3. Click *Accept* to accept the Terms of Use.

4. Browse through an alphabetical listing of the available output styles, and *Download* those files you want to install.

5. Copy the downloaded files to your Styles folder, which is typically located at Program Files\EndNote X4\Styles , or to your personal Styles folder (see Folder Locations Preferences).

6. If EndNote is still open, please *Exit* the program and then restart EndNote to read in the added output styles.

The styles will now be available in EndNote to select for formatting.

Previewing Styles and Showing Information

Click *More Info* in the Style Manager to show the information panel. (When you choose *More Info,* the button changes to *Less Info*, which will hide the panel.) The information panel is used to display more detail about the selected style.

Use the *Style Info/Preview* button to toggle between these displays:

Style Information: Details about the style are displayed in the Information panel. These include the creation and modification dates, category, which style guide the style is based on, and any limitations or comments about using the style.

Style Preview: In the preview section, EndNote shows how a journal, book, and book section would be formatted with the selected style.

Previewing Styles Using Your Own References

EndNote uses built-in examples for the previews in the Style Manager window. If you want to preview a style using your own references:

1. In the Style Manager, mark the style as a favorite by clicking in the check box next to its name. This adds the style to the *Output Styles* menu.
2. From the Edit menu, choose *Output Styles*, and select the style to preview.
3. Open a library, and click the *Preview* tab in the Tab pane.
4. Select any reference in your library to have it displayed on the Preview tab.

The preview tab displays only one reference at a time. If you would like to preview a group of references, you can use the *Copy Formatted* command and the Clipboard:

1. From the Edit menu, choose *Output Styles* and select a style.
2. Select one or more references in your library and choose *Copy Formatted* (Ctrl + K) from the Edit menu.
3. *Paste* from the Clipboard into a word processor document to see the formatted references as they would appear in a bibliography.

Or, use the *Print Preview* command on the File menu to print the showing references in the library window.

Copying Styles

When you display a list of styles in EndNote, the list is comprised of the installed styles found in the Program Files\EndNote X4 \Styles folder as well as new or modified styles found in your personal Styles folder. For an explanation of where your files are stored, see Folder Locations Preferences.

Because each style is a separate file on your hard drive, you can copy them as you would copy any file on your hard drive using the Windows desktop .

To copy a style to a removable disk, select the style on your hard drive and drag it onto a disk. We recommend that you make a backup copy of any new or modified styles. (see Backing Up Your EndNote Files).

To make a copy of a style from within EndNote:

1. From the Edit menu, choose *Output Styles* and select *Open Style Manager*.
2. Select the style you want to copy and click *Edit.*
3. Without making any changes to the file, choose *Save As* from the File menu.
4. Give this copy of the file a new name and *Save* it.

The file is saved in your personal Styles folder. The new style will remain open. The original style will be left untouched.

Saving Styles

To save a new style that you have just created, or to save changes to a style you have just modified, choose *Save* or *Save As* from the File menu.

If you have modified one of the original installed files in the Program Files\EndNote X4 \Styles folder, you must use *Save As* to save a copy to your personal Styles folder. If you have modified a style that is already located in your personal Styles folder, you can choose either *Save* to directly modify the file, or *Save As* to make a copy with the changes. For a description of where your styles are stored, see Folder Locations Preferences.

If you close a Style window before saving a style, EndNote prompts you to save or discard the changes you have made, or choose *Cancel* to return to the style. If you quit from EndNote while a Style window is open, the same dialog appears.

EndNote automatically saves new styles to your personal Styles folder. You may also specify a different folder if necessary. For instructions see Folder Locations Preferences.

EndNote styles use the file name extension of ". ENS" (for EndNote Style), as in " Nature.ens."

Deleting Styles

To delete a style from within EndNote:

1. From the Edit menu, choose *Output Styles* and select *Open Style Manager*.
2. Select the style to be deleted.
3. Choose *Clear* from the Edit menu, or right-click on the style and choose *Delete* from the shortcut menu, or press the *Delete* key.

You can also delete an unwanted style by switching back to the Windows desktop, and opening the appropriate Styles folder (see Folder Locations Preferences). Then, select the file to delete and choose Delete from the File menu, or drag the file to the Recycle Bin.

Note: You must have read/write access to the Styles folder in order to delete a style. If you do not have administrator access, you likely will not be able to delete a file located within the Program Files folder.

Renaming Styles

Rename styles using the *Save As* command in EndNote's File menu. This allows you to make a copy of any style that you want to modify, so you can keep several variations of the same style. You can also rename

styles by switching to the Windows desktop , locating the style file in the Styles folder, clicking on the file name, and typing a new name.

For an explanation of where your files are stored, see Folder Locations Preferences.

Reverting Changes to a Style

If at any time you need to revert your changes back to the last saved copy of the style, choose *Revert Style* from the File menu. Once you close the Style window the changes are permanent until changed again.

Closing a Style

To close a Style window, click the close button in the upper right corner of the window, or choose *Close Style* from the File menu. If you have not saved your changes to the style, EndNote prompts you and gives you the option to save or discard any changes that you have made.

What Should I Do if My Style Is Not Included?

EndNote supplies over 4,500 journal styles for your convenience; however, because there are thousands of journals published, the style you need may not be included. This should not be a problem because you can customize a style of your own or edit any of EndNote's preconfigured styles.

If a style that you need is not included with EndNote, we recommend modifying a style that is similar to what you need. To download more of the predefined styles, see Installing Additional Output Styles.

To find and modify a similar style:

1. From the Edit menu, choose *Output Styles* and select *Open Style Manager.*
2. In the Style Manager, change the setting in the information panel from *Style Info* to *Style Preview*. The preview of the selected style should now be displayed.
3. Scroll through the list of available styles to see if you can find one that is similar to what you need.
4. Once you have found a similar style, select it, and click the *Edit* button. The Style window opens.
5. Choose *Save As* from the File menu, give this copy of the style a new name that corresponds to the name of the journal you want to use it for, and click *Save*. This will also keep the original style unchanged, in the event that you need to use it later.
6. The new Style window remains open for you to edit it as you need. For more details about editing parts of a style, read Modifying Style Templates and Additional Style Formatting Options.

Once the new copy of the style has been saved, it will be added to your style menus.

Accessing Styles in Other Places

The Style Manager displays only the styles found in specific folders. We recommend that you copy additional styles to your personal Styles folder.

For an explanation of where your files are stored, or to change your personal Styles folder location, see Folder Locations Preference.

Basic Components of a Style

The best way to understand how a style works is to open one up and look at it.

> **To create a new style**: From the Edit menu, choose *Output Styles* and select *New Style*. If you are interested in creating a new style, see Creating a New Style.

To edit a style: From the Edit menu, choose *Output Styles* and then *Open Style Manager.* Select the file to edit and click *Edit.* The most recently used style can also be opened by selecting *Output Styles* from the Edit menu, and choosing *Edit <style>.*

The Style Window

After choosing the option to edit an existing style or create a new one, EndNote opens the Style window.

All of the different options for editing a style are listed on the left side of the Style window. The first four items (*About This Style, Anonymous Works, Page Numbers*, and *Journal Names*) apply to citations, bibliographies, and citations in footnotes. The rest of the options in the Style window are grouped under one of four headings:

Citations: Panels listed under the *Citations* heading apply only to citations in the body of the text.

Bibliographies: The items listed under the *Bibliography* heading apply to the bibliography that EndNote creates when you format a paper. These settings are also used with the *Export, Print, Copy Formatted*, and *Preview* options.

Footnotes: The items under the *Footnote* heading apply to citations that have been inserted into the footnotes or endnotes in a word processing document. (You must first create the footnotes in your word processor, and then insert EndNote citations into them.)

Figures and Tables: The items under *Figures and Tables* apply to EndNote figures and tables that have been inserted into a Microsoft Word document.

Click on the plus next to one of the headings to expand or collapse the view to show or hide the related options. Click on an item under the headings to view the associated panel. You may switch between panels as needed while editing the file. No changes are saved in any of the panels, however, until you choose *Save* or *Save As* from the File menu.

Style Templates

The *Citation*, *Bibliography*, and *Footnote* sections of the style all have a *Template* panel and other options for fine tuning the style.

The *Templates* panels are the major component of the styles. They include the field names and punctuation organized in the way EndNote should format the references for that particular style. The templates look like citations or bibliography entries, except that field names are used in place of the actual data. During the formatting process, EndNote replaces the field names with the corresponding information from the references.

For details about working with style templates see Modifying Style Templates.

Other Style Options

Under each heading in the Style window (*Citations*, *Bibliography*, and *Footnotes*) there are a series of options for how to fine-tune the formatted references in citations, bibliographies, or footnotes. Many of these options are repeated for the three sections (such as the settings that determine how author names are treated), because each of these three areas of the document might require a slightly different format. The Figures and Tables section applies specifically to EndNote figures and tables inserted into a Word document.

Modifying Style Templates

Modifying Style Templates

If you are creating a bibliography that requires a style not included with EndNote, then you can modify a style to suit your needs. (See What Should I Do if My Style is Not Included?) Editing a style requires a general understanding of how styles work and the components of a style. Read Basic Components of a Style to become familiar with the terms. These topics can help you in creating or modifying style templates:

Citation Template

Bibliography and Footnote Templates
Changing the Punctuation in a Formatted Reference
Adding and Removing Fields in a Formatted Reference
Adding New Reference Types
Font and Text Styles
Rules for Working with Style Templates
EndNote Cleans Up
Special Formatting Characters
Additional Style Formatting Options

Citation Template

Click on *Templates* under the *Citation* heading to view the Citation panel. This template tells EndNote how to format the in- text citations in the body of your paper. For example, the Numbered style uses a bracketed bibliography number for the in-text citation. (The bibliography number corresponds to a numbered reference in a bibliography.) An author-year type of style would probably display something such as "(Author, Year)" in the citation template.

You may change the template by deleting unwanted field names or punctuation, retyping the punctuation you want, and inserting new fields with the *Insert Field* button. See Modifying Style Templates for information about editing templates.

Multiple Citation Separators

Use the "Multiple Citation Separators" section of this dialog to specify the punctuation to separate multiple citations in your papers. A multiple citation is an in-text citation that includes more than one reference within a single set of delimiters, such as: (Argus, 1993; Billoski, 1993; Hall, 1988). This example uses a semicolon and a space as the separator between citations.

The separator can be changed by typing other text in the "Multiple citation separator" box. Remember to include a space in the separator section when necessary.

Year Format

If you would like EndNote to use 2-digit years (such as ’r;99) in the in-text citations, check the "Use 2-digit years" option. Years from all centuries will be abbreviated to display just the last two digits. This applies only to the years in the in-text citations.

Footnotes: Defining Long and Short Forms

Both full and short form templates are available from the Style window. Define short form footnote settings for Templates, Author Lists, Author Name, Editor Lists, and Editor Name.

1. From the Edit menu, select *Output Styles*, *Open Style Manager*.
2. From the Style Manager window, select a style from the list of names (for example, Chicago), and then click the *Edit* button.
3. From the Style window, choose a category under the Footnotes heading (for example, *Author Name*).
4. Enter all your changes.
5. Click *Save As* from the File menu.
6. Give your updated settings a name (for example, "My Chicago Footnotes Settings"), and then click *Save*.

Bibliography and Footnote Templates

Click *Templates* under the Bibliography or Footnotes heading to see the templates for how those references are formatted.

For footnote and bibliography templates, each has a "Generic" template, and other reference-type-specific templates to format the various reference types in a bibliography.

The following examples show how journal articles, books, and book sections, respectively, would be formatted with the Numbered style. Notice that each reference type is formatted differently, which is why different templates are required:

1. Emiliani, C., *Competitive evolution*. Journal of Theoretical Biology, 1982. **97**: p. 13-33.
2. Jones, V.R., *The Theory of Foraging*, B.J. Bloggs, Editor. 1976, Smith and Barnes: New York.
3. Whitney, J.R., T.V. Billoski, and V.R. Jones, *Evidence for Triceratops in Antarctica, in New Directions* in *Paleontology*, T.V. Billoski, Editor. 1987, Academic Press: New York. p.24- 27.

Generic Template

The Generic template is used to format references that use the Generic reference type or do not have their own template in the style. For example, if a Book template had not been included in the style, book references would be formatted using the Generic template.

Generic - Short Form Template

The Generic - Short Form template may be defined for each reference type just like the regular footnote. You can edit the short form in a template. The order of use is that:

1. The short form definition for a specific reference is used.
2. If the definition is not available, then the generic short form definition is used.
3. If no generic definition is available, then the full form of the reference for that type is used.
4. If the full form is not available, then the generic full form is used.

Other Reference Type Templates

The rest of the templates in the style tell EndNote how to format specific reference types, such as journals, books, and book sections. If a check mark appears next to a reference type in the Reference Type list, a template is already defined for it (you can edit the template).

Footnote Template Options

Styles have varying requirements for how citations in footnotes should be formatted. The options at the top of the Footnote *Templates* panel allow for the different conditions.

For some styles, citations in footnotes are formatted just like in- text citations (in the body of the paper). In that case, there is no need to create a special template for footnotes, simply choose the *Same As In-text* option from the Footnote Format options.

Similarly, some formats request that citations in footnotes are formatted as full bibliographic references, exactly like the bibliography. For those styles, you can set the footnote format option to *Same as Bibliography.*

However, if you need the footnotes to use their own special format (most styles for the humanities require this), you would choose the option to format citations in footnotes with a unique footnote format. For this option, you need to define the templates for how citations in footnotes should be formatted.

For information about how to treat repeated citations, such as using a short form for non-consecutive repeated citations, and Ibid. for consecutive repeated citations, see Repeated Citations in Footnotes.

When using the short form, select the check box that tell the system to include the Title field only when needed to disambiguate a citation.

Changing the Punctuation in a Formatted Reference

Punctuation that appears in your formatted references can be changed by editing the style you are using. When you edit a style, you can delete unwanted punctuation, replace it with other punctuation, or add additional punctuation where necessary.

For example, if the Numbered style creates a perfect bibliography for your document *except* that it puts a comma after the authors' names where you need a period, you can edit the Numbered style to make this change.

To edit the Numbered style:

1. Choose the Numbered style in the Output Styles menu.
2. Choose *Edit Numbered* from the *Output Styles* menu to open the Numbered Style window.
3. Click the *Templates* option under the *Bibliography* heading.
4. For each reference type (such as Generic, Journal Article, and Book), delete the comma that follows the field name "Author" and type a period.

   The style's bibliographic templates should now look like the example below. Notice that the punctuation after the Author field in each template has been changed to a period.
5. From the File menu, choose *Save As*. In the dialog that appears, enter a new name for this modified Numbered style and click *Save*.

Now you can use the new style to create a formatted bibliography that puts a period between the author names and the titles.

For information about making punctuation or spaces appear only under certain circumstances see Special Formatting Characters. That topic also explains the use of the non-breaking spaces (◊), vertical bars (|), accent grave (`), and the carets (^) that you see in the style templates.

Note: If you save a new style into a folder other than the current styles folder, it will not be available in the Style Manager. You should save new styles to your Styles folder, or change Folder Locations Preferences if necessary.

Adding and Removing Fields in a Formatted Reference

The field names (such as Author, Year, and Title) that you see when editing a style template, indicate what information is included in your formatted reference. If you want to include a field, such as notes, along with your references, you should add the Notes field to the style that you use. Similarly, to exclude unwanted information that is appearing in a bibliography, you must delete the field name that contains that information from the style's bibliography template.

The examples below show two common scenarios in which fields are added to or removed from the formatted bibliography. Whenever you change the fields in a style template be sure to check the surrounding punctuation to make sure that it is still accurate.

Adding a Field to a Style Template

To insert a new field into a style template:

1. From the Edit menu, choose *Output Styles* and select *Open Style Manager.*
2. Select the style that you want to edit, and click *Edit.*
3. Click on the *Templates* option under the *Bibliography* heading, and position the cursor at the location in the template where you want to add a field.
4. Click the *Insert Field* button and choose the field to be added.
5. After the field is inserted, add any punctuation or spacing that is necessary to correctly incorporate the new field into the style.

Note: As a short-cut, you can use the options in the *Layout* panel to add text or punctuation before or after *every* reference in a bibliography. See Bibliography Layout.

Deleting a Field from a Style Template

If EndNote includes information in your bibliography that you do not want to be there, you can edit the style and delete the unwanted field's name and any associated punctuation.

For example, if a style includes the issue number in your journal references, and you do not want the issue to appear:

1. In the Style Manager, select the style and click the *Edit* button.
2. Under the *Bibliography* heading, click the *Templates* option.
3. Select the text to be deleted (for example, ". Issue|"), and press the Delete or Backspace key.

Along with the Issue field, also remove the period that precedes it and the vertical bar, a special formatting character, that follows the Issue field. (See Special Formatting Characters for more information about the vertical bar.)

Adding New Reference Types

When a style does not include a template for a specific reference type, such as Report, EndNote uses the style's Generic template to format that reference type. Although there are times when the Generic format suffices, often it is not sufficient because the other reference types need to be formatted differently. Therefore, you should make specific templates for the different reference types that you will be including in your bibliographies.

To add a new reference type template to a style:

1. From the Edit menu, choose *Output Styles>Open Style Manager* and select the style that you want to modify.
2. With the style selected, click the *Edit* button.
3. In the Style window, click the *Templates* panel under the *Bibliography* heading.
4. Choose the name of the desired reference type from the *Reference Types* drop down list . (Reference Types that are already defined appear in the list with check marks next to their name.)

A new template for that reference type is added at the bottom of the Style window (scroll to the bottom of the Style window if you do not see it).

Defining the Format for the New Reference Type Template

Defining the format for a new template is a process of inserting the necessary fields and punctuation in the correct order. For this example, we want a report to look like this (Author, Title, Report Number, Year, Institution, and City):

> Trift, M, Aspects of the tethyan rifting, 88-101. 1998, Institute for Tethyan Rifting: Austin, TX.

We can insert the fields and type the punctuation to create a template for the Report reference type. Use the *Insert Field* button at the top of the Style window to insert the fields in the correct order. After inserting a field name, type the punctuation and spacing that should follow it. Apply text styles, such as italics for the Title, by selecting the text to change and using the Style toolbar.

The final template for the Report reference type looks like this:

> **Report**
> Author,·*Title*, ·Report·Number.·Year,·Institution:·City.

Fonts and Text Styles

By default, text entered into a Style window appears in EndNote's *Plain Font*, *Plain Size,* and *Plain Style* settings, which allow the bibliography that EndNote creates to adopt the font settings in your paper. For example, if you type your paper in 10 point Times font, EndNote uses that font for the paper's bibliography.

Use the *Edit* menu or the Style toolbar to apply any font, size, or text style to your Style templates. (Note that only the standard Windows fonts are available.)

All text attributes entered into a style template carry over into the bibliography that EndNote creates. You can use this feature, for example, to italicize titles or make the volume numbers bold. Any font or text style changes entered in an EndNote Reference window carry through the bibliography as well. For example, any italicized terms in your references will still appear italicized in your bibliography, regardless of the text attributes that the EndNote bibliographic style applies.

Rules for Working with Style Templates

There are four basic rules of *dependence* that govern how text, spaces, and field names influence each other when they are used in a style template. If necessary, these rules can be circumvented in specific situations using the special formatting characters described in the next section of this chapter.

Rule #1: Basic dependence

Any text or punctuation that is not separated from a field name by an ordinary space is *dependent* on the adjacent field.

In this context, "dependent" means that the text or punctuation adjacent to a field *only* appears in your bibliography if the adjacent field contains data. For example, in this excerpt:

Volume·(Issue)

the parentheses around "Issue" only appear in a formatted reference if there is an issue number for the reference.

Rule #2: The preceding field takes precedence over the following field.

When punctuation appears between two fields with no intervening spaces, it is dependent on the preceding field.
In this example,

Volume:Issue

the colon is dependent on the Volume field. This means, if there is no volume in the reference, the colon will not appear. If there is a volume, the colon will appear.

Note: This example shows a case where the rules of dependence might not do what you want. For example, you might want to have the colon only show when there is an issue. This can be done using the special formatting characters.

Rule #3: The first space after a field is dependent on that field. Additional spaces are independent.

The first ordinary space following a field is always dependent on that field. Any consecutive spaces after that are independent and will always appear in the formatted references.

For example, if EndNote formats an anonymous book using a template that has the Author field followed by a space and the Title field:

Author.·Title

the title will *not* be preceded by a space in the final formatted reference because the space, just like the period, is dependent on the Author field. However, if the style includes two spaces between the Author and the Title:

Author.··Title

the title will be preceded by one space for all anonymous references. The first space, being dependent on the Author field, disappears when there is no author, however the second space is *independent*, so it remains in the formatted reference.

Independent spaces can be forced to be dependent on an adjacent field using the special formatting characters.

Rule #4: Independent text always appears in the bibliography.

Any text or punctuation that is not dependent on a field name always appears in the formatted references. For example, if:

Edition· ed.

is entered into a style's Book template using only an ordinary space to separate the text " ed." and the field "Edition", the text " ed." will appear in all Book references—regardless of whether or not there is an edition for that reference.

Note: The non-breaking space can be used in place of a regular space to link independent text to a field. See Special Formatting Characters.

EndNote Cleans Up

Too confused about all these rules? Well, even if you don' t get everything quite right according to the rules, EndNote will do its best to clean up the formatted reference. Obvious problems are fixed automatically.

Normally, field text is entered into EndNote without ending punctuation, so that the selected output style can supply punctuation as required by that particular style. However, when you download references from various sources, some information providers may include punctuation.

For example, when an output style directs EndNote to insert a period after a field, EndNote must determine what to do with any punctuation that already exists at the end of the field in the reference.

Punctuation found, plus punctuation added by the output style:	Replaced with:
spaces, period	period
comma, period (,.)	period
semicolon, period (;.)	period
colon, period (:.)	period
double periods (..)	single period
question mark, period (?.)	question mark
exclamation point, period (!.)	exclamation point

EndNote treats other forms of extra punctuation like this:

Punctuation found, plus punctuation added by the output style:	Replaced with:
double spaces	single space
double commas (,,)	single comma
double semicolons (;;)	single semicolon
double question marks (??)	single question mark

double periods (..)	single period
comma, period (,.)	period
question mark, period (?.)	question mark
exclamation point, period (!.)	exclamation point
question mark, exclamation point (?!)	question mark
exclamation point, question mark (!?)	exclamation point

One set of punctuation that is never replaced is the period, comma (.,) because it may be used for abbreviations like ed., et al., etc.

Special Formatting Characters

EndNote has special formatting characters that add flexibility and precision to the grouping of punctuation and fields in the style templates.

Link Adjacent Text (Using the Non-breaking Space)

If you type "Edition ed." into a style template and use an ordinary space to separate the field name "Edition" from the abbreviation " ed.", then " ed." will appear regardless of whether or not the reference has an edition (see Rule #4).

To avoid this problem, make " ed." *dependent* on the Edition field by linking " ed." to the Edition field with a non-breaking space. Think of a non-breaking space as bibliographic formatting glue. It joins two or more items together so they act as a single unit. Thus, any text or punctuation "glued" to a field will drop out of the bibliography if that field is empty.

You can insert a non-breaking space by selecting *Link Adjacent Text* from the Insert Field list in the *Templates* panels. You can also enter it by typing Ctrl+Alt+Space . It appears on the screen as a small diamond.

The non-breaking space is converted to a normal space in the formatting process. Common uses of the non-breaking space include (where "◊" is used as a non-breaking space):

p^pp◊Pages

Edition◊ed.

vol◊Volume

Editor◊Ed.^ Eds.

The non-breaking space is also used in conjunction with the vertical bar (see below) to change the dependency of a punctuation mark from one field to another.

Volume|: ◊Issue|.

In this case, the colon (:) is linked to the Issue field with a non-breaking space, so it does not print in the bibliography if the Issue field is empty.

Forced Separation—Using the Vertical Bar

If you do not want text or punctuation to be dependent on the preceding or following field, use the vertical bar character (|), to force a separation of the text from a field. The vertical bar can be found on the same key as the backslash (\). It can also be inserted from the Insert Field list in the *Templates* panels.

Think of a vertical bar as *breaking* dependence, or forcing separation between two dependent items. (The vertical bar works in exactly the opposite way as the non-breaking space.)

For example, the Journal Article templates in some styles require a period between the volume and issue. A template for such a style might look like this (where " ·" indicates a space):

Journal Article
Author. ·"Title." ·Journal· Volume.Issue·(Year):·Pages.

However, when this style formats a journal article that does not include an issue number, the bibliography entry will be incorrect, as in the following example:

Clark, H. and Carlson, T. "Hearers and Speech Acts." Language 58.(1982): 332-373.

Notice that the period used to separate the volume from the issue appears here in the absence of an issue because it is dependent upon the Volume (Rule #2). And the space separating the volume and the year is lost because that space is dependent upon the Issue field (Rule #3).

EndNote has a way of avoiding these problems. The vertical bar character (|) can be used to break the automatic grouping of spaces and punctuation with adjacent fields.

If you insert the vertical bar before the period in our example, the period's dependency switches from the Volume field to the Issue field. Add another vertical bar before the space that follows the Issue field, and the space will no longer be dependent on the Issue field. Use the vertical bar character in conjunction with the non-breaking space. With these changes the style looks like this:

Journal Article
Author. ·"Title."·Journal Volume|.Issue|·(Year)|:· Pages|.

And the formatted reference without an issue is correct:

Clark, H. and Carlson, T. "Hearers and Speech Acts." Language 58 (1982): 332-373.

Other common examples for using the vertical bar include:

Publisher|: ◊City

Pages|. (to make the final period independent)

Field Names in Bibliographies

Sometimes you may need to use text in a template that is also an EndNote field name for that reference type. For example, you may want to use the word "Editor" after the editor's name:

Jones, V.R., B.K. Marion, and R.L. Zeiss, *The Theory of Foraging*, in A History of Foraging Behavior, B.J. Bloggs, Editor. 1976, Smith and Barnes: New York.

Normally, EndNote interprets the word "Editor" as a field name when it appears in a book's style template. This is even true of field names that appear as part of a word, such as "Editors" or "Issued." Field names need not be capitalized to be recognized.

To force EndNote to interpret a word as just text and not as a field name in a template, put an accent grave character before and after the word: ` Editor`. The accent grave is found in the upper left corner of most keyboards on the same key as the tilde (~). Remember to also use the non-breaking space to link the text, ` Editor`, to the Editor field.

Book Section
Author,· *Title*|. ◊in◊Book· Title|, ◊Editor, ◊`Editor`|.·Year,·Publisher|: ◊City|,·p. ◊Pages**.**

Singular/Plural Term Separator (Caret ^)

You can specify both singular and plural forms of labels for editors or pages in a formatted reference by using a caret (^) to separate the terms. For example, some styles put "Ed." after a single editor and " Eds." follows several editors' names. Or, similarly, "p." might precede a single page, while " pp." precedes multiple pages. This feature can be applied to any field that corresponds to the Generic field for Author, Secondary Author, Tertiary Author, Subsidiary Author, Pages, and Cited Pages.

In the style template, enter both the singular and plural forms of the label separated by a caret (insert it from the Insert Field list or type Shift+6). Any text before the caret, back to but not including the preceding space, is used for the singular form; text after the caret, up to the next space, is used for the plural form. These terms must also be linked to the relevant field using a non- breaking space. For example, a style template might look like this:

Edited Book
Editor, ◊ed.^ eds.·*Title*. ·Number·of·Volumes◊vols|. ◊Vol.·Volume|,·*Series Title*|.·City|: ◊Publisher|, ◊Year|.

Or like this:

Journal Article
Author. ·"Title,"·Journal Volume|. ·Issue|·(Year)|:p.^ pp.·Pages|.

Additional Style Formatting Options

Additional Style Formatting Options

Templates determine the general layout of the formatted references and citations. The remainder of the panels in the Style window can be used to fine-tune certain aspects of a bibliographic style:

- Anonymous Works
- Page Numbers
- Journal Names
- Sections (Microsoft Word Only)
- Ambiguous Citations
- Numbering
- Author Lists (Bibliography and Footnotes)
- Author Lists (Citations)
- Author Names (Bibliography and Footnotes)
- Author Names (Citations)
- Editor Lists and Editor Names
- Layout
- Sort Order
- Title Capitalization
- Repeated Citations (in Footnotes)
- Figure and Table Placement and Captions

Anonymous Works

Anonymous works are defined by EndNote as references where the Author field is blank (not "Anonymous"). The settings in the *Anonymous Works* panel apply to all sections of a style (*Citations, Bibliography,* and *Footnotes*).

Leave Author Blank: The author section of the formatted reference is left empty. If the references are to be sorted by author names, the anonymous works would be sorted at the top of the list because they have no author.

Use Title in Place of Author: Where the author would have appeared, the title is used instead. If the references are sorted by author, the anonymous references will be sorted as though the title were the author. If you would prefer that EndNote use the contents of the "Short Title" field in place of the full title (where available), click the "Use Short Title" check box. If EndNote encounters a reference that does not have anything entered into the Short Title field, it uses the contents of the regular Title field instead.

Use APA Specifications: The American Psychological Association format (used by many journals) requires a special variation of the "Use Title in Place of Author" option.

Insert Text: The text that you enter here appears in the author's place in the formatted reference, and it is used for sorting purposes if the references are to be sorted by author names. Commonly this text would be something like the word "Anonymous" or "Anon."

Page Numbers

The Page Numbers panel allows you to specify how the page numbers should be formatted for your references:

Don' t change page numbers
The contents of the Pages field are used directly in the formatted reference. No changes are made.

Show only first page
Only the first characters in the Pages field up to, but not including, the first dash or comma are included in the bibliography. **Example**: "123-125" in the Pages field becomes "123" in the formatted reference.

Abbreviate last page
Any digits of the last page number that are the same as the first page number are eliminated. **Example**: "123-125"in the Pages field becomes "123-5" in the formatted reference.

Abbreviate last page, keeping two digits
Any digits of the last page number that are the same as the first page number are eliminated, down to a minimum of two digits. **Example**: "123-125"in the Pages field becomes "123- 25" in the formatted reference.

Show range of pages
Leading digits are added to the last page number, if necessary, so the full page range is used. **Example**: "123-5" in the Pages field becomes "123-125"in the formatted reference.

Show only first page for Journals and full range for others
Journal articles are formatted differently from other types of references.

Note: Special Formatting Characters describes how to instruct EndNote to add text such as "p." vs. " pp.", or "page" vs. "pages" to the formatted references using the caret (^).

Journal Names

Different journals have different standards for abbreviating journal names. For example, some styles may require "Proceedings of the National Academy of Science" to be abbreviated as " Proc. Nat. Acad. Sci.," " P.N.A.S." or " PNAS." EndNote's Journals term list provides a way for you store up to four variations of journal names (the full name and three forms of abbreviations) to be used in your bibliographies.

The Journals term list that is created for every library is automatically linked to the Journal and Alternate Journal fields, and therefore it is ready to be used with the Journal Names options. You simply need to be sure that the necessary information is in the Journals term list, and that your style is set up to use the correct form of the journal name.

If your Journals term list includes the name of the journal as it is entered in your EndNote references, and the form of the journal name that you would like to appear in your bibliographies, you may simply set your preference in a style to have EndNote substitute a form of the name in the Journals term list for what was entered into your references.

EndNote provides several journal abbreviation lists for different disciplines (including medicine, chemistry, and humanities). If you are interested in using one of these lists, you may import it into your Journals term list (see Loading Supplied Journal Abbreviations) and set up a bibliographic style to use one of the abbreviations for the formatted bibliography. If EndNote does not provide a journal term list that applies to your area of research, you may also enter the journal abbreviations yourself. See Important Points About Entering Journal Names.

To modify a style to use the abbreviations in a Journals term list:

1. From the Edit menu, select *Output Styles* and choose *Open Style Manager.*
2. Select the style that you would like to modify and click *Edit.*
3. Select the *Journal Names* panel from the list at the left of the Style window to see the available options:

   Full Journal Name
   When creating a bibliography, EndNote replaces the Journal name in the reference with the form of that name in the first column of the Journals term list. This first column is normally used for full names.

   Abbreviation 1
   Abbreviation 2
   Abbreviation 3
   In the bibliography, the journal name for each reference is replaced with the form of that name in the second, third, or fourth column of the Journals term list, respectively.

   Don' t Replace
   In the bibliography, EndNote uses the journal name exactly as it appears in the reference in the EndNote library. No changes are made.

   Abbreviate in Journal Articles Only
   The substitutions made with the Journal Names option can apply to all Secondary Title fields, or to the Secondary Title field for only the Journal Article reference type. If you uncheck this option to apply this feature to all reference types, EndNote also abbreviates fields such as Conference Name, and the names of magazines and newspapers.

   Remove Periods
   Choose this option to have EndNote eliminate the periods from all journal names in the bibliography that it is creating, regardless of the abbreviation being used. This option does not require that the journal names be in the Journals term list. For example, if the journal names are entered into your references using periods, and you do not have a Journals term list that includes the names without periods, you can still just check this option and the periods will be stripped out of the journal names when EndNote formats a bibliography.

If a journal name is not found in the specified column of the Journals term list, the style uses the journal name as it appears in the Reference window. No replacement is made for that journal.

If nothing is entered in the Journals term list or if there is no special Journals term list, the *Journal Names* option always defaults to *Don' t Replace*, and EndNote uses the journal name exactly as it appears in the original reference.

Note: None of these changes actually takes place in the EndNote library. These options only determine what information goes into the bibliography that is generated using the *Copy Formatted*, *Print*, *Export*, and *Format Bibliography* commands.

Sections (Microsoft Word Only)

Previous versions of EndNote always created a single bibliography at the end of your word processor documents. That is still true when you Cite While You Write in OpenOffice.org Writer documents or format RTF files. However, EndNote X4 includes additional output style options specifically for Microsoft Word. You can choose to:

Create a complete bibliography at the end of each document (the default setting for almost all of the supplied output styles).

Create a bibliography for each section in the document (as defined in the styles *APA 5th (sections)* and *Chicago 15th B (sections)*).

Create a bibliography for each section and also a complete bibliography at the end of the document.

For more information about using sections in a Microsoft Word document, see Creating Multiple Bibliographies in a Single Document.

Note: The Sections portion of an output style is ignored by OpenOffice.org Writer , RTF files, and versions of EndNote prior to version X4.

Create a complete bibliography at the end of each document

This default setting formats a single bibliography at the end of a document. Even if you have broken the document into multiple sections, a single bibliography will appear at the end of the document.

Create a bibliography for each section in the document

When you select this option, a bibliography is created at the end of each section, and includes only the citations within a section.

An additional check box is available for sections:
Continue numbering, or apply settings for disambiguation and repeated citations across sections.

When the check box is blank

When a numbered bibliographic style is selected, citation numbering will be restarted at the beginning of each section.

When a non-numbered bibliographic style is selected, ambiguous citation settings will be restarted and applied to each section individually. For more information about ambiguous citation settings, see Ambiguous Citations.

When the check box is selected

For a numbered style, selecting the check box will assure that numbering is continued across sections. For example, if citations in the first section are numbered 1 to 10, citations in the next section will start with number 11.

For a non-numbered style, ambiguous citation settings will apply across the entire document. For more information about ambiguous citation settings, see Ambiguous Citations.

Create a bibliography for each section and a complete bibliography at the end of the document.

This option creates a bibliography for each section as well as a complete bibliography of all the citations in the document.

For numbered styles, citation numbering continues sequentially across all sections, without restarting for each section.

For non-numbered styles, ambiguous citation settings are applied across the entire document, without restarting for each section.

If a document is not divided into sections, EndNote formats a single, complete bibliography at the end of the document.

Ambiguous Citations

With in-text citations like (Smith, 1995) or (Smith 246-9), references can have identical in-text citations if they are by the same author or the authors have the same last name. This leads to ambiguity in the citations that would make it impossible for the reader of your paper to know which reference to Smith you are referring. EndNote provides various ways to avoid this sort of ambiguity in your citations.

Any combination of the following options may be used. Click in the check box next to all options that apply. Note that these settings assume the author is used in the in-text citation. They are not relevant for styles that use bibliography numbers for the in-text citations as it is not possible to have ambiguous citations when they are uniquely numbered.

Include author initials in citation
Check this option to have EndNote include initials with author names to distinguish between citations by

different authors that happen to have the same surname. Choose how the initials should appear from the *Initials* option in the section. For example, the MLA style uses just author names and page numbers in citations. Initials are added to clarify which Smith wrote the cited reference:

(S. Smith 241-5) and (L. Smith 12-20)

List more authors until citation is unique
Some styles request that only a fixed number of authors be listed in the in-text citation, and then "et al." or "and others" is inserted to indicate that the author list was abbreviated. Choose this option if you would like EndNote to list additional authors to make the citation unique. For example, if the in-text citations were set to list only 3 authors, and you have two references in which the first three authors are the same, EndNote would add a fourth author to the citations, and continue in that manner until the list of authors was different between the two citations.

Add the title for different works by the same author(s)
If you have two works by the same author, it won' t help to add initials or list more authors to differentiate the two. In this case, some styles request that the title of the reference (or a shortened form of the title) be added to the in-text citation. If you choose this option and select the "Short Title" option, EndNote includes the contents of the Short Title field when available. Otherwise, it uses the full title. The format of the title is taken directly from the bibliography. This is an example in the MLA style, which normally includes only the author and page number in a citation:

(Smith, *History of Our Times* 35)

(Smith, *Looking Forward* 77)

Add a letter after the year
For citations in an (Author, Year) format, EndNote can add a letter to the year to make citations from the same author published in the same year distinguishable from each other. The letter appended to the year will appear in both the in- text citations and references in the bibliography.

(Smith 1995a)
(Smith 1995b)

Numbering Citations

The settings in the citation *Numbering* panel apply only when "Bibliography Number" is used in the Citation Template. This creates uniquely numbered citations in the text of the paper; the numbers correspond to entries in the bibliography. For papers formatted with a numbered style, these options are relevant to multiple citations grouped within one set of citation delimiters. When unformatted, a multiple citation looks like this:

{Keys, 1998 #93; Jen, 1996 #88; Yagi, 1998 #199}

Use number ranges for consecutive citations

When this option is checked, consecutive bibliography numbers appearing in a multiple citation are joined by a single hyphen, for example:

…as shown by the Berkeley studies conducted in 1987[3-6] and 1989[1,7].

Grouped References

The "Grouped Reference" option allows you to cite with one number any references that always appear together in the paper as multiple citations. The citations are not given their own numbers, but rather one number is used both in the text and the bibliography to identify the whole group of citations. With this setting, you also have the 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.

Composite Citations

Within grouped references, you can differentiate individual citations with letters.

To 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.

   (1a, 1b), (1a, 1b, 2a-c)
   The number always appears with a stand-alone letter or with the first letter of a range. This is the default setting.

   (1a, b), (1a, b, 2a-c)
   Only the letter of the first citation of the composite is preceded with the number.

   (1a, b), (1a, 1b, 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, 1b), (1a, 1b, 2a-2c)
   Letters are always preceded by a number.

4. Use the “Precede by” and “Follow by” boxes to enter any character(s) that you want to surround the letter in the bibliography.

Citation Author Lists

If the style you are using lists the author names in the Citation template of the Style window, you can use the *Author List* options (as well as the *Author Names* panel) to control how the authors appear in your in-text citations. If your citations do not include the author names, ignore the *Author List* panel.

Separators Between Author Names

In the "Author Separators" box, enter any punctuation and spaces that separate the individual author names in a citation. In references with multiple authors, it is standard to separate the names with a comma and a space. Use the "between" box to enter a comma and a space, or any other required punctuation. In the "before last" box, enter the separator that appears before the *last* author in a reference. Sometimes this is something other than a comma and a space, such as ", and " or an ampersand (&) followed by a space.

Normally only the first row in the Author Separators box is used (with the range of authors set at "1 to 100") so that the separators in that row apply to all of the authors cited in a reference. However, there are styles in which two authors are listed as "Smith and Jones" (without a comma), and more than two are listed as "Smith, Jones, and Johnson" (with a comma before the word "and"). In this case, make " and " the "Separator before last author" when there are only two authors; and enter ", and " when there are 3 or more authors.

Note: Include spaces after commas as well as before and after the word "and".

Abbreviating the Author List, First Appearance

Some journals require that you abbreviate the list of authors, using "et al." or an equivalent, after a certain number of authors. The "Abbreviated Author List" section of the Author Lists panel allows you to specify the number of authors needed to trigger this abbreviation, how many authors to include in the formatted reference, and what the abbreviation should be.

List all author names
Choose this option if you do not want to abbreviate the author lists.

If ___ or more authors, list the first ___ author(s)
Select this option and fill in the blanks with the appropriate numbers if you would like the list of authors abbreviated.

and abbreviate with
Enter an abbreviation such as ", et al." You can italicize the abbreviation by selecting the "Italic" check box in the dialog.

Abbreviating the Author List, Subsequent Appearances

In some bibliographic styles, if a reference is cited more than once in your paper the first appearance of it in an in-text citation is formatted differently from subsequent citations. For example, the first citation might list all authors, while subsequent citations list only the first author followed by "et al."

Use the "First Appearance" author list settings to specify the way the authors appear the first time the reference is cited. Use the "Subsequent Appearances" options to format authors in all other appearances of the citation.

Citation Author Names

Name Format

The Name Format section allows you to specify how the author names should look—whether the first or last name should come first, and whether there should be a comma after the last name.

First Author/Other Authors: Using the list for "First Author" and "Other Authors", you can have the first author appear differently from the other authors in a reference. From these lists, choose the example that shows the name in the order that you would like it to be in the citation. If the in- text citations use only the last name, this setting is not important.

Capitalization: Specify how you would like the author names to appear.
As Is (as entered in the reference)
Normal (first letter of each name is capitalized)
ALL UPPERCASE
Small Caps (these may or may not be supported by your word processor)

If you apply a capitalization option to author names, but have a specific name that you do not want changed, you can use the Change Case preference to leave that name as entered. See Change Case Preferences .

Initials: Choose from the available options in the list to specify how the initials should look in the citations. Choose *Last Only* if you only need the last name of the authors to appear in the citations.

"Use initials only for primary authors with the same name"
This option allows for initials to be used only when there are primary authors with the same last name included in the bibliography. Regardless of whether or not the resulting citations are ambiguous (that is, they could be from different years), EndNote will add the initials to those citations to clarify that they are from different authors who happen to have the same surname.

Consecutive Citations by the Same Author

If a multiple citation includes works by the same author, some styles request that you not repeat the author name. Check the setting to "omit repeated authors" and EndNote will omit the author name from the citation after it first appears. In order for this setting to be used, the citations must all be grouped together in a multiple citation, and the citations by the same author must appear one right after the other.

For example, a reference such as this:

(Smith, 1993; Smith, 1999; Wyatt, 2000)

would be changed to look like this:

(Smith, 1993, 1999; Wyatt, 2000)

You have the additional option in this case to choose the separator to use between these citations. Notice in the example above, the style normally uses a semicolon to separate multiple citations. But when there are a series of citations by the same author, the repeated author names are dropped and the years are separated by commas. In this case, a comma and a space should be entered as the punctuation with which to separate the consecutive citations by the same author.

If you have entered citations with suffixes and you would like those citations excluded from this formatting, check "Don' t omit authors from citations with suffixes." For example, if two references by the same author included page numbers:

(Smith, 1993 p 24; Smith, 1999 p 5; Wyatt, 2000)

some styles request that you do leave the author name in the second citation for clarity.

Author Lists (Bibliography and Footnotes)

The *Author Lists* panels under the *Bibliography* and *Footnotes* headings let you specify exactly how the authors are to appear in the formatted bibliographic references or in your footnotes. You can format author names differently in the footnotes and bibliography, so be sure that you check the *Author Lists* settings under both the *Bibliography* and the *Footnotes* headings to adjust settings. The settings in these panels apply to all reference types formatted with the current style.

Separators Between Author Names

In the "Author Separators" box, enter any punctuation and spaces that separate the individual author names in a bibliographic reference. In references with multiple authors, it is standard to separate the names with a comma and a space. Use the "between" box to enter a comma and a space, or any other required punctuation. In the "before last" box, enter the separator that appears before the *last* author in a reference. Sometimes this is something other than a comma and a space, such as ", and " or an ampersand (&) followed by a space.

Normally only the first row in the Author Separators box is used (with the range of authors set at "1 to 100") so that the separators in that row apply to all of the authors cited in a reference. However, there are styles in which two authors are listed as "Smith and Jones" (without a comma), and more than two are listed as "Smith, Jones, and Johnson" (with a comma before the word "and"). In this case, make " and " the "before last" separator when there are only two authors; and enter ", and " when there are 3 or more authors.

Note: Include spaces after commas as well as before and after the word "and".

APA 6th Settings

The APA 6th settings allows you to display the first six authors (or editors) followed by the text (preset to ", ...") followed by the last author (or editor). Select the radio button that says:

"If eight or more authors, list the first 6 authors, insert , ... and add the last author's name."

When this setting is selected, it overrides whatever settings are in the *Author Separators* and *Editor Separators* settings at the top of the panels.

Note: The default value is ", ..." You can, however, change this value - for example, you can set this value to "et al." or whatever style you choose.

Abbreviating the Author List

Some journals require that you abbreviate the list of authors, using "et al." or an equivalent, after a certain number of authors. The "Abbreviated Author List" section of the Author List panel allows you to specify the number of authors needed to trigger this abbreviation, how many authors to include in the formatted reference, and what the abbreviation should be.

List all author names
Choose this option if you do not want to abbreviate the author lists.

If ___ or more authors, list the first ___ author(s)
Select this option and fill in the blanks with the appropriate numbers if you would like the list of authors abbreviated.

and abbreviate with
Enter an abbreviation such as "et al." You can italicize the abbreviation by selecting the "Italic" check box in the dialog.

For Subsequent Works by the Same Author

In some bibliographic styles, if a there is more than one work by an author (or group of authors), the first appearance of that author name is formatted differently from subsequent works. For example, the first reference might list the full author name, while subsequent references display a line of dashes in place of the author name.

You can print the entire author list for each reference, completely leave out the author list for subsequent works, or replace repeated author lists with a text string.

Abbreviated Author List - Short Form (for footnotes only)

List all author names
Choose this option if you do not want to abbreviate the author lists.

If ___ or more authors, list the first ___ author(s)
Select this option and fill in the blanks with the appropriate numbers if you would like the list of authors abbreviated.

and abbreviate with
Enter an abbreviation such as Ibid. You can italicize the abbreviation by selecting the "Italic" check box in the dialog.

When you are finished defining your short form Author Lists footnote styles:

1. Click *Save As* from the File menu.
2. Give your updated settings a name (for example, "My Chicago 15th Author Lists"), and then click *Save*.

Author Names (Bibliography and Footnotes)

Name Format

There is an Author Names panel for bibliographies and footnotes, as well as for citations. Some styles request that author names are formatted differently in all three cases. Be sure that you choose the *Author Names* panel from under the appropriate heading. The author names format for citations is described in Citation Author Names. This topic describes the options that are available for both the footnote and bibliography *Author Names* panel.

These settings are for choosing how author names should look— for example, whether the first or last name should come first, whether there should be a comma after the last name, and how the names should be capitalized.

First Author/Other Authors: Using the list for First Author and Other Authors, you can have the first author appear differently from the other authors in a reference. From these lists, choose the example that shows the name in the order that you want in the reference.

Capitalization: Specify how author names should appear.
As Is (as entered in the reference)
Normal (first letter of each name is capitalized)
ALL UPPERCASE
Small Caps (these may or may not be supported by your word processor)

If you apply a capitalization option to author names, but have a specific name that you do not want changed, you can use the Change Case preference to leave that name as entered. See Change Case Preferences .

Initials: Choose from the available options in the list to specify how the initials should appear in the formatted references. Click the "Initials" list to choose how the authors' first and middle names should be formatted. If you have not entered the full first names and you choose the *Full Names* option, EndNote uses the names as you have entered them into the reference. Choose *Last Only* to show just the last name, with no first or middle initials.

Note: Initials entered into an EndNote reference must be separated by a period or a space (such as M.J. Stein or M J Stein). Two letters together (such as MJ Stein) will *not* be interpreted as two initials, but instead as a two-letter first name.

Name Format - Short Form

There is an Author Names panel for displaying footnotes in short form.

First Author/Other Authors: Using the list for First Author and Other Authors, you can have the first author appear differently from the other authors in a footnote. From these lists, choose the example that shows the name in the order that you want in the footnote.

Jane Smith
Smith, Jane
Smith Jane

Capitalization: Specify how author names should appear. For example:

As Is
Normal
All Uppercase
Small Caps

Initials: Choose from the available options in the list to specify how the initials should appear in the formatted footnote. For example:

Full Name
Last Name
A. B.
A.B.
A B
AB

When you are finished defining your short form Author Name footnote styles:

1. Click *Save As* from the File menu.
2. Give your updated settings a name (for example, "My Chicago 15th Authors"), and then click *Save*.

Editor List and Editor Names

To specify how the editors' names are to be formatted, select *Editor List* or *Editor Name* from under the *Bibliography* or *Footnote* heading. In those panels you will find some of the same settings that have been described for formatting author names.

The *Editor List* settings apply to the generic Secondary Author, Tertiary Author, and Subsidiary Author fields. These fields includes "Editor" in the Book Section and Conference Proceedings reference types, and "Series Editor" in the Book and Edited Book reference types.

The instructions for the Editor List panel are identical to those described for the Author List panel. Similarly, the Name Format options in the *Editor Name* panel are the same as those for Author Names.

"Editors" Are Considered Primary Authors for Edited Book Reference Types

The *Author List* and *Author Names* settings apply to the primary author field of each reference type. Therefore, *Author List* and *Author Names* apply to the editor's name in an Edited Book. And the *Editor List* and *Editor Names* settings apply to the Series Editor's name in an Edited Book reference type.

Name Format - Short Form

To specify how the editors' names and the abbreviated editors' list are to be formatted in short form, select *Editor List* or *Editor Name* from under the *Footnote* heading. In those panels you will find some of the same settings that have been described for formatting author names.

Use the menus to select how you want to format the following in footnotes:

First author
Other authors
Capitalization
Initials

When you are finished defining your short form Editor Name / Editor Lists footnote styles:

1. Click *Save As* from the File menu.
2. Give your updated settings a name (for example, "My Chicago 15th Editors"), and then click *Save*.

Bibliography Layout

Under the *Bibliography* heading there is a *Layout* option that provides options for inserting text before and after each reference in a bibliography, as well as applying hanging indents to your references.

Adding Text Before Each Reference

In the "Start each reference with:" section, you can specify what information, if any, should appear before each reference in your bibliography. (For information on how to add a prefix before a *citation*, see Temporary Citations).

A common reference prefix is the bibliography number, which is used by all numbered styles to number the references in a bibliography.

To add a bibliography number before each reference:

1. Open the Style Manager by choosing *Output Styles* from the Edit menu and selecting *Open Style Manager*.
2. Select the style that you would like to edit, and click *Edit.*
3. After the Style window opens, choose *Layout* from under the *Bibliography* heading.
4. Click in the text box below the "Start each reference with" section, and select *Bibliography Number* from the *Insert Field* list.
5. Type the necessary punctuation after the bibliography number (such as a period and a space) or insert a tab from the *Insert Field* list.

With a style configured in this way, EndNote creates a bibliography with numbered references, such as:

1. Argus, M.V. "New paleontological excavation techniques" *Nature* **19**, 234-237 (1993).

Note: To create a hanging indent, where the second and subsequent lines of a reference are indented, see Hanging Indents below.

Other Reference Prefix Fields

Other commonly used reference prefixes appear in the *Insert Field* list.

Some bibliographic styles use a *Label* in the citation and the bibliography to refer to each entry with a short mnemonic code, often the author's name and the last two digits of the year. When you enter references into your library, you can type the mnemonic code directly into the Label field. When EndNote builds a bibliography, it can put that code before each reference.

Choosing *Citation* as a reference prefix allows you to label the references in the bibliography with the in-text citation.

Reference Type will insert the reference type (such as Journal Article or Book) before each reference.

Record Number will insert the record number before each reference. The record number is the number that EndNote assigns to each reference in the library, and it is also used in the in-text citations. Add *Record Number* as a reference prefix in any style in order to print all the references in your library with their unique EndNote record numbers.

Adding Text After Each Reference

Use the "End each reference with" section of the *Layout* panel to specify what information, if any, should follow each reference in your bibliography. (For information on how to add text after an in-text citation in your document, see Citation Suffixes).

This command can be used to add the content of the Label, Keywords, Abstract, or Notes field, or the Record Number. Any other text or punctuation can also be entered as a reference suffix and it will appear at the end of each reference in the formatted bibliography. Two common uses for the *Reference Suffix* command are shown below.

Example: Adding Notes to the Bibliography

If you have notes that you want to print together with your references, you should add the Notes field as a reference suffix in the style that you are using to print or format the references.

1. Open the Style Manager by choosing *Output Styles* from the Edit menu and selecting *Open Style Manager*.
2. Select the style that you would like to edit, and click *Edit.*
3. After the Style window opens, choose *Layout* from under the *Bibliography* heading.
4. Click in the text box below the "End each reference with" section, and select *Notes* from the *Insert Field* list. This will append the Notes field to every reference in the bibliography when you format a paper with the style.

If you want the notes to begin on a new line after the reference, insert a paragraph mark from the Insert Field list before "Notes." If you want the notes to be indented, like the start of a new paragraph, insert a Tab before the word "Notes."

Adding or Removing Blank Lines Between References

Another common use for the *Layout* options is to add a blank line between references. To do this, edit the style as described above, and insert a paragraph mark (using the *Insert Field* list) into the "End each reference with" section.

To tighten up the bibliography and get rid of the blank line after each reference, edit the style, click on the *Layout* panel, and select and delete the paragraph mark (¶) to get rid of the blank line.

Hanging Indents

Many numbered bibliographic styles require a hanging indent, as shown in this example:

1. Postma, G., Nemec, W. & Kleinspehn, K.L.
   Sedimentary Geology **58**, 47 (1988).
2. Nyamweru, C. *Journal of African Earth Sciences*
   And The Middle East **8**, 40-42 (1988).

EndNote provides a few hanging indent options. Normally, each reference is one paragraph, so some of these options would not apply. But if you have a reference that includes more than one paragraph, EndNote gives you options for which paragraph within a reference the hanging indents should apply. Examples of multi-paragraph references include annotated bibliographies where the abstracts follow each reference, or a style such as those common in anthropology journals where the authors are on a line of their own

Hanging indent options include: *None, All Paragraphs, First Paragraph Only, Second Paragraph Only,* and *All Paragraphs but the First.* The following is an example of when you would use *Second Paragraph Only*. The style requires that authors begin on the left margin, and then the year (and the rest of the reference) starts on a new line and is indented. The style applies a hanging indent to the second paragraph only, and inserts a tab before and after the year. In the word processing document, the spacing for the hanging indent should be aligned with the second tab stop.

Curtis, S.A., and N.F. Ness
2000 Remanent magnetism at Mars. Geophysical
Research Letters 15(8):737.

The spacing used for tabs and indents is determined by the ruler settings in your word processor.

Note: If you are creating a numbered bibliography, as shown in the previous example, insert a tab after the bibliography number to have the references line up correctly.

Tabs

Tabs may be inserted from the *Insert Field* list. A tab entered into a style will appear as a tab in the formatted bibliography. The tab appears as an arrow on the screen. The width of the tab as it appears in the bibliography is determined by the tab settings in your word processor.

Tabs are often entered after the bibliography number as part of the *Layout* settings. This helps to align the start of each reference after the number, which is especially important if the bibliography entries use a hanging indent.

Sort Order: Bibliographies and Multiple Citations

Each style has instructions for sorting references in the bibliography, and how to sort formatted multiple citations in the text of your paper. Select *Sort Order* from under either the *Citations* or *Bibliographies* headings.

Multiple Citation Sort

The *Sort* panel under the *Citation* heading allows you to set the order that the style uses to sort multiple in-text citations. For example, an unformatted multiple citation looks like this:

{Lee, 1990 #5; Jacob, 1994 #22; Zoler, 1983 #19}

Formatted with the Author-Date style, the citations are sorted chronologically and the formatted citation looks like this:

(Zoler 1983; Lee 1990; Jacob 1994)

Options for sorting multiple citations include:

Same as Bibliography
Sorts multiple citations in the same order as the Bibliography Sort Order.

Author + Title
Sorts multiple citations first by authors and then by title.

Author + Year + Title
Sorts multiple citations first by authors, then by year, and then by title.

Year + Author
Sorts multiple citations chronologically. Then citations from the same year are sorted based on author names.

Don' t Sort
Multiple citations remain in the same order as they appear in the unformatted temporary citations.

Other
A custom sort order is applied to multiple citations. See Custom Sorting.

Bibliography Sort Order

The "Bibliography Sort Order" section determines how the bibliography should be sorted. Common options are listed, and you may also configure a custom sort order.

Order of Appearance
References are listed in the order in which they are cited in the paper.

Author + Title
References are sorted by the Author field. References with identical authors are sorted by title.

Author + Year + Title
References are sorted by the Author field, then references with identical authors are sorted by year. References with identical authors and years are then sorted by title.

First Author + Year + Other Authors
References are sorted by just the first author, then references with identical primary authors are sorted by year. References with identical primary authors and years are then sorted based on the other authors in the reference.

First Author + # of Authors + Year
References are sorted by just the first author, then by the number of authors in the reference. For references with the same primary author and the same number of authors, they are then sorted chronologically based on the Year field.

Other
A custom sort order is applied to the references in the bibliography. See Custom Sorting.

Sort Edited Works After Original Works By Same Author:
Some styles request that if the same person is the author for a book and the editor for an edited book, the original works by that author are sorted first, and then the edited works follow. This is an exception to the sorting rules that can be applied to the other sort options provided.

Note: When sorting by Author field, EndNote sorts based on all information in the Author field, including all author names (not just the first author) and initials. To see about omitting parts of author names or the initial words of a title when sorting, see Sorting Preferences.

Custom Sorting

To sort references or multiple citations differently from the options in the "Citation Sort Order" or "Bibliography Sort Order" sections, select the option for *Other* and choose from the lists any combination of up to five fields in ascending or descending order.

This window is identical to the one that appears when you choose *Sort References* from the References menu. You do not need to use all five options. The button at the right of each box controls the direction of the sort, either ascending or descending order. Clicking these boxes toggles the sort order between ascending and descending order.

Once you have set up your sorting strategy, click *OK* to return to the main Sort Order panel for the style. The *Other* button will now display your custom sorting instructions.

Title Capitalization

Both the *Footnotes* and *Bibliography* sections have a *Title Capitalization* panel. This lets you enter one style of capitalization for the titles in your bibliographic references, and another format for when the references appear in footnotes.

Options for title capitalization include:

Leave titles As entered: No changes are made.

Headline style capitalization: The first letter of every significant word is capitalized. Articles and prepositions are not capitalized.

Sentence style capitalization: Only the first letter of every title is capitalized.

Note: See Change Case Preferences to enter words or acronyms that should not be adjusted when EndNote changes the capitalization of titles.

Repeated Citations (in Footnotes)

Most of the complex formatting in footnotes is relevant only to styles in the humanities. There are a wide variety of formats required for citing references in the footnotes of a paper. These options are provided in the Repeated Citations panel under the Footnote heading.

Some styles take the shortening of references in footnotes even farther when the repeated references appear in consecutive footnotes (or in the same footnote). EndNote provides additional options for the special handling of these cases.

If the Same Reference Repeats in Consecutive Footnotes

When the same reference repeats in consecutive footnotes, you have the option of replacing the repeated data with text of your choice. This is normally "Ibid" (or a variation of the term). You may also select an option from the Insert Field list. For example, the Cited Pages option lists the page numbers when the same reference repeats in consecutive footnotes. In this instance, you would have to go to the Edit & Manage Citations dialog and enter the pages numbers if you want them for a specific citation.

Note: If you replace the default value with the Author field option from the Insert Fields list, EndNote *will only* display the author name if the previous citation is ambiguous. Otherwise, EndNote will display the default value (for example, "Ibid") or another term of your choice.

The Omit Repeated Data option allows you to simply omit the repeated data and replace it with nothing.

You may also apply No Special Handling and when references repeat in consecutive footnotes, they will be handled just like other repeated references in footnotes.

If the Same Source Repeats in Consecutive Footnotes

This setting does not apply to the identical *reference* that repeats in consecutive footnotes, but rather if any of the source data repeats in two consecutive footnotes. For example, if two different references happen to be from the same journal, these settings would apply to the journal name, volume, and issue (or whatever portion of that source information is identical). You may choose "No special handling" for these cases, so that these references are not abbreviated. Or you may choose to replace the repeated data with "Ibid" (or the text of your choice). If you choose this option, you may limit the replacement to only the Secondary Title field (this includes the journal, magazine, or newspaper name, or the title of a book for a book section).

Note: We realize that many of these detailed settings for the style can be confusing. We have done our best to configure the styles for you so that you will not need to edit them and work through these details on your own. However, if you find that you need to modify these parts of your styles, please consult your style guide for more detailed descriptions and examples of handling repeated citations in footnotes.

Figure and Table Placement and Captions

Figure and Table Placement and Captions

The Figures and Tables settings apply to images inserted into a Word document from EndNote. You can place images where they are cited in a document or at the end of the document, and you have control over the placement and punctuation of labels and captions.

While style guidelines tend to be very specific in regard to formatted citations and bibliographies, they are often vague about figure and table placement. They may require different placement for different document types (theses, term papers, journal articles, etc.), or they may not offer instructions at all.

EndNote's default figure and table placement settings are the same for all output styles. Please check your own style documentation (or check with your editor or teacher) for specific guidelines about image placement for the type of document you are creating.

Note: Additional Figures and Tables settings are available under Cite While You Write Preferences, and can override output style settings. See Figures and Tables in Word.

Figures and Tables

Under the Figures and Tables heading in the left column of the output style editor, select either Figures or Tables. Tables are images inserted from the Figure field in the Chart/Table reference type. Figures are images inserted from the Figure field of any other EndNote reference type. The same options are available under each, which allows you to place figures differently than tables.

Placement

Under Placement, select a button to either place the images within the text of the document, near the reference to the figure, or to place images in a list at the end of the document.

If your images are placed in-text, you can use Cite While You Write preferences to override this automatic placement when your document is reformatted. This is helpful if you have moved your images around in the document and want to retain their placement. See Figures and Tables in Word.

Caption

Next, under Caption, select a button to place the label and caption either above or below the image. You can also select the check box to place the label and caption on separate lines.

Note: The label inserted by EndNote is "Figure #" for images found in the Figure and Equation reference types as well as for most other reference types. The label is "Table #" for images found in the Chart/Table reference type. The Caption is the text typed into the Caption field of a reference.

Separation and Punctuation (Figures and Tables)

Under Image Separation, you can enter separators for images inserted within the text of a document and for images that are listed at the end of a document.

Note: The settings on this panel affect both figures and tables.

Image Separation

When images are inserted in-text, you can specify the number of lines to insert before and after the image to separate it from text. This setting affects both figures and tables that are placed in-text. If your images are placed in a list at the end of the document, this setting is ignored.

When images are placed in a list at the end of the document, you can separate each figure or table with a page break or a specified number of blank lines before and after each image. If your images are placed in-text, this setting is ignored.

Caption Punctuation

For each figure or table inserted into Word from an EndNote reference, EndNote generates a label and then inserts the caption from the Caption field of the EndNote reference. For example:

Table 1. Bird Evolution

You can select the check boxes to insert a period after the label and/or after the caption. This affects the labels and captions for both figures and tables.

EndNote will attempt to remove double punctuation in case you inadvertently include a period within the record as well as selecting one here.

Creating a New Style

Creating a New Style

It is often easier to modify an existing bibliographic style that closely resembles a style that you need than it is to create a new style from scratch. (See Modifying Style Templates.) If you do wish to create a new style, Example: Creating an Author Date Style gives you a general overview of the process.

Creating a bibliographic style involves building templates for the in-text citations and the bibliographic references to mimic how you want them to appear in your paper. Then adjust the various options to be sure that authors, titles, pages, and other fields are being formatted according to your requirements. Example: Creating an Author Date Style guides you through the creation of a fictitious author-date type of style.

Example: Creating an Author Date Style

Creating the Templates

A new style need only contain a Citation template and a Generic Bibliography template for it to produce citations and bibliographies for any paper. The Citation template applies to all in-text citations, and the Generic bibliography template applies to all reference types that do not have templates of their own in the style. The Generic template should be considered a default template, and you should add additional templates for the standard reference types which you use. If you define a specific template for any reference types, they are formatted according to that template, and not the Generic format.

To create style templates:

1. To create a bibliographic style, go to the Edit menu to select *Output Style* and then *New Style*, and a new Untitled Style window appears.
2. Click the *Templates* panel under the *Citations* heading to specify the format of the in-text citations.

   Our style uses the author name and the year in the citation. They are surrounded by parentheses and separated by a comma.
3. With the cursor in the Citation Template, type an open parenthesis, click the *Insert Field* button and choose *Author* from the list of available fields, type a comma, choose *Year* from the Insert Field list and then type the closing parenthesis.

   Next, define the Generic format which serves as the default template for reference types that do not have their own template. We know that books should be formatted like this, so we can set up the Generic template to accommodate that format:

   Jones, VR, BK Marion, et al. (1976). *The Theory of Foraging*. New York, Smith and Barnes.

4. Click the *Templates* option under the *Bibliography* heading, then click in the "Generic" section of that *Templates* panel.

5. Choose *Author* from the Insert Field list to add the Author field to the style template. (You can also type "Author" but it is safer to select the field name from the list.) Type a period and a space. And continue inserting fields and punctuation until you have created a template that mimics the format of the reference (where " ·" indicates a space):

   Author.·(Year).·Title. ·Place·Published,·Publisher.

6. In this style, the title must be italicized, so double-click the word Title to select it, then from the Edit menu, choose *Style* and *Italic*.

7. Save the new style by choosing *Save As* from the File menu. In the dialog that appears, type "Practice Style" as the name of this style and click *Save.* This will save the style and add it as an option in the Output Styles submenu of the Edit menu.

Test the Style

Open your library and choose *Show Preview* from the bottom of the Library window. Select different references in your library to see how they format. You will probably see that the books look good, but journal articles do not display enough information. You will need to return to the style and create a template to format journal articles. To do so:

Create a New Template for Journals

In the *Templates* panel under the *Bibliography* heading, choose *Journal Article* from the *Reference Type* list. This will create a new section for a Journal Article template. Insert the fields and punctuation to create a template as shown below:

Author·(Year). ·"Title." ·Journal·**Volume**: ◊Pages.

Once again, save the style by choosing *Save* from the File menu. Return to the Library window, and check the preview to see how journal article references are formatted.

Finishing the Style

Continue testing how other reference types format, and include additional reference type templates as necessary. See Modifying Style Templates for specifics about creating and modifying style templates.

Look at how the author names are formatted, and change the necessary settings. You should also take a close look at pages, title capitalization, the sort order of the references, and various other options provided in the Style window. These are described in Additional Style Formatting Options.

Filters

Introduction to Filters

Introduction to Filters

The *Import* command on EndNote's File menu provides a way to import text files of reference data into EndNote libraries. EndNote has a number of built-in import options as well as a large collection of configurable import "filters." Filters are designed to import references downloaded from specific online or CD-ROM bibliographic databases.

You can edit and create import filters. The process of importing references using the *Import* command is described in General Importing Instructions.

EndNote provides hundreds of import filters for a variety of sources. By default, the 100 most popular filters are stored as individual files in the Filters folder in your EndNote program folder. To install additional filters, see Installing Additional Filters.

What is a Filter?

The import **filters** provide a wide range of import options. A filter is selected during the import process to show EndNote exactly how to interpret the information in your **data file** (the records downloaded or saved from an online or CD-ROM database). A filter does this by mapping the information in each downloaded reference to the corresponding fields in EndNote.

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. Each filter provided with EndNote has been configured to import data files from a specific database offered by a single information provider. You can easily modify any of the supplied filters or create a new filter to import from other databases.

A Comment About Difficult Data Files
Although EndNote's filters are very powerful and flexible import tools, there are still some data files that cannot be conquered. Whereas some databases provide very clean tagged data, others are almost impossible to discern. Lack of consistency in the source data and the omission of reference type tags often make it difficult for a person to understand the information; the task of creating a perfect filter to handle these files is futile. When fine tuning our filters, we have done our best to always capture the necessary data—even if that means dropping it all into the Notes field. If you find filters that can be further improved, please let us know. It may also help to contact your information provider to let them know that the inconsistencies in the data entry for the database are keeping you from most efficiently making use of it.

The Filter Manager

EndNote provides hundreds of import filters for a variety of sources. By default, the 100 most popular filters are stored as individual files in the Filters folder in your EndNote program folder. To install additional filters, see Installing Additional Filters.

The Filter Manager lists the names of the original filter files available in the Program Files\EndNote X4 \Filters folder as well as any new or modified filters in your personal Filters folder, and gives you the option to edit them or select them as "favorites" for quick access when you use the *Import* command. You can click and drag the corner of the dialog to increase the size.

Use these features to locate the import filter you want to use:

If you know the name of the filter that you want to use, you may start typing it and the first filter name that matches what you type will be selected.

Click the *Find by* button and choose an information provider's name (such as Ovid or SilverPlatter) to find only the import filters for a specific information provider.

Click the *Find by* button and choose *All Filters* to return all of the import filters to the displayed list.

Click a column heading to sort the import filters by name or by information provider. Clicking the same column heading a second time will change the sort order from ascending to descending. Click again to set it back to ascending order.

Click the *More Info* button at the bottom of the dialog to display additional information about the selected filter.

Marking Your Favorite Import Filters

When you have found a filter that you will want to use in the future, click the check box to the left of it to mark it as a favorite. All filters that are marked as favorites appear in the *Import Options* list in the Import dialog. You can get to the Import dialog by choosing *Import* from the File menu. This gives you easy access to those files you use most often.

To mark all of the filters for a specific information provider, click the *Find by* button and, from that list, choose the name of the information provider. Now, with just that subset of filters listed in the Filter Manager window, click *Mark All*. The *Unmark All* button may be used to unmark all of the filters that are showing in the list.

Editing Import Filters

If you would like to modify a filter, select it in the list and click *Edit.* These topics can help guide you:

The Basic Components of a Filter
The Filter Editor Window
Working with Filter Templates
The Filter Options
Modifying an Existing Filter: An Example

Installing Additional Filters

The EndNote team has developed hundreds of different filter files. Because installing all of these files may slow performance, a typical EndNote installation includes only the 100 most popular filters. You can install sets of filters by provider with the EndNote installer , or you can download individual filters from the EndNote web site.

Using the EndNote installer to install additional filters

First, make sure EndNote is closed and not running. You can run the EndNote installation program again, choose the option to Modify the installation, and then select sets of filters to install.

To install sets of filters:

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. Do one of these:

   Start the EndNote installation program as you would for a new installation.

   Or, from the Windows *Start* menu, select *Control Panel*, or choose *Settings* and then *Control Panel*. Then, choose *Add or Remove Programs*. In the list, click on EndNote X4 and then *Change*.
3. On the "Application Maintenance" dialog, select the *Modify* option and click *Next*.
4. On the "Select Features" dialog, click the plus sign (+) next to Additional Filters.

5. For each set of filters you would like to install, click the triangle and select either "Will be installed on local hard drive" or "Entire feature will be installed on local hard drive."
6. Click *Next* to continue with the installation.

The filters will be copied to the EndNote Filters folder, which is typically Program Files\EndNote X4\Filters.

Finding individual filters on the EndNote web site

You can use the Filter Manager in EndNote to find and download individual filter files.

To download individual filters:

1. From the *Edit* menu in EndNote, choose *Import Filters* and then *Open Filter Manager*.
2. Click *Get More on the Web* to start your default browser and go to the appropriate page on the EndNote web site.
3. Click *Accept* to accept the Terms of Use.
4. Browse through an alphabetical listing of the available filter files, and *Download* those files you want to install.
5. Copy the downloaded files to your Filters folder, which is typically located at Program Files\EndNote X4\Styles .

Copying Filters

When you display a list of filters in EndNote, the list is comprised of the installed filters found in the Program Files\EndNote X4 \Filters folder as well as new or modified filters found in your personal Filters folder. For an explanation of where your files are stored, see Folder Locations Preferences.

There are two ways to copy filters. Since each filter is a separate file on your hard drive, you can copy them as you would copy any file on your hard drive using Windows Explorer .

To make a copy of a filter from within EndNote:

1. From the Edit menu, choose *Import Filters* and select *Open Filter Manager*.
2. Select the filter you want to copy and click *Edit.*
3. Without making any changes to the filter, choose *Save As* from the File menu.
4. Give this copy of the filter a new name, and *Save* it.

The file is saved in your personal Filters folder. The new filter will remain open. The original filter will be left untouched.

Saving Filters

To save a new filter that you have just created, or to save changes to a filter you have just modified, choose *Save* or *Save As* from the File menu.

If you have modified one of the original installed files in the Program Files\EndNote X4 \Filters folder, you must use *Save As* to save a copy to your personal Filters folder. If you have modified a style that is already located in your personal Filters folder, you can choose either *Save* to directly modify the file, or *Save As* to make a copy with the changes. For a description of where your styles are stored, see Folder Locations.

EndNote automatically saves new filters to your personal Filters folder. You may also specify a different folder if necessary. For instructions see Folder Locations.

EndNote filters use the file name extension of ". ENF" (for EndNote Filter), as in " Medline.enf.

Deleting Filters

To delete a filter from within EndNote:

1. From the Edit menu, choose *Import Filters>Open Filter Manager.*
2. Select the filter to be deleted.
3. Choose *Clear* from the Edit menu, or right-click on the filter and choose *Delete* from the shortcut menu, or press the Delete key.

You can also delete an unwanted filter by switching back to the Windows desktop , and opening the appropriate Filters folder (see Folder Locations Preferences). Then, select the file to delete and choose *Delete* from the File menu or drag the file to the Recycle Bin .

Note: You must have read/write access to the Filters folder in order to delete a filter. If you do not have administrator access, you likely will not be able to delete a file located within the Program Files folder.

Basic Components of a Filter

The Basic Components of a Filter

You need to know the basic components of a filter if you want to customize or create a filter.

> **To create a new import filter:** From the Edit menu, choose *Import Filters* and select *New Filter*. If you are interested in creating a new filter, also read Creating a New Filter.
>
> **To edit a filter**: From the Edit menu, choose *Import Filters* and select *Open Filter Manager.* Select the filter to edit and click *Edit.* The most recently used filter can also be easily edited by selecting *Import Filters* from the Edit menu, and choosing *Edit <filter>.*

These topics explain the basic components of a filter:

> The Filter Editor Window
> "About This Filter" Panel
> Working with Filter Templates
> The Filter Options

The Filter Editor window

After choosing the option to edit an existing filter or create a new one, EndNote opens the Filter window.

All of the different options for editing a filter are listed on the left side of the Filter window. Click on an item to view the associated settings. You may switch between panels as needed while editing the file. No changes are saved in any of the panels until you choose *Save* or *Save As* from the File menu.

If at any time you need to revert your changes back to the last saved copy of the filter, choose *Revert Filter* from the File menu.

To close a Filter window, click the button in the upper right corner of the window, or choose *Close Filter* from the File menu. If you have not saved your changes to the filter, EndNote prompts you and gives you the option to save or discard any changes that you have made.

"About this Filter" Panel

The Filter window opens to display the *About this Filter* panel. This panel contains descriptive information about the filter. None of the information used in this panel has any impact on establishing the connection.

Name: Displays the name of the filter as it appears in the Filters folder in the EndNote folder. The file name extension (. ENF) is not displayed. The name of the filter cannot be changed here; you would need to close this window and switch back to the Windows desktop to rename the filter.

Based On: Enter any information about what documentation was used to create the filter. Commonly the server documentation is available on the Web, so you could enter a URL here as well to make it easy to later retrieve that information.

Category: The category is typically the information provider (such as Ovid or SilverPlatter), but you may enter anything that will help you categorize and organize your filters. The category information is also listed in the Filter Manager window in the column next to the name of the filter. In that window, you may sort filters by category and also search for them by category.

Created: The date the filter was installed or created.

Last Modified: The date the filter was last modified.

Comments and Limitations: Enter any helpful information such as how to download the references in the format that works with this filter.

All of the information in this panel is visible in the Filter Manager if you click the *More Info* option at the bottom of the Filter Manager window. This is helpful because you do not need to edit a filter to view the comments or other descriptive information. You may simply scroll through the available filters in the Filter Manager window and view the information there.

Working with Filter Templates

Working with Filter Templates (Import Filters and Connection Files)

The most important part of a filter or connection file is the *Templates* section. The templates define how the various lines of tagged data in your data file should be imported and filtered into the different EndNote fields (such as Author, Year, and Title). Different sets of templates are required for the different reference types that may be in your data file.

The *Templates* panel consists of individual Reference Type templates which correspond to the way the reference data is presented in the data file. These topics will help you:

Navigating in the Templates Panel
Templates for Different Reference Types
Adding and Deleting Rows in the Filter Template
Cutting, Copying and Pasting Rows
Literal Text vs. EndNote Fields
The { IGNORE} Field
The Source Line
The Reference Type Tag
Fields with Special Characteristics
When Punctuation Repeats Within a Field

Navigating in the Templates Panel (Import Filters and Connection Files)

The *Templates* panel in a filter is divided into a Tag column and a Field(s) column. The tag and its corresponding field(s) are two separate cells in a row. If a cell is active, an outline appears around the cell.

Tag	Field(s)
TI:	Title

To move from one cell to the next, press the Tab key or click the mouse in the desired cell. To move back to the previous cell, hold down the Shift key while pressing the Tab key.

To change the width of the Tag column in the Filter window, position the cursor over the vertical line dividing the Tag and Field(s) columns. The cursor changes to indicate that you are in the correct place. Click and drag to the right or left to resize the column widths.

Click the Reference Types list to change the view to a different reference type (such as from Journal Article to Book).

Templates for Different Reference Types (Import Filters and Connection Files)

The *Templates* panel includes templates for all of the various reference types (Journal Article, Book, etc.).

> Click the Reference Types list to change the view to a different reference type (such as from Journal Article to Book).
>
> The reference types that have a check mark displayed next to them already have a template defined (you can edit the template if you wish). The reference type that appears in bold type is currently the default reference type.

The only reference types templates that need to be filled in are the ones that correspond to the reference types in your data file. For example, if the database from which you are downloading contains only journal articles, you would only need to fill in the templates for the Journal Article section in that particular filter.

Within each reference type template there is a list of tags and their corresponding EndNote field names. These templates should exactly match the way the information is organized in the data file. Any text or punctuation that you see that is not part of a field name (such as " vol." before the Volume) is included to make the template exactly match the data file.

Adding and Deleting Rows in the Filter Template (Import Filters and Connection Files)

When adding and deleting rows, the order of the tags does not have to match the order of the tags in the data file. There is one case in which the order of the tags is important: if you are entering multiple variations of one tagged line, you should enter the repeated lines for that tag in order from the most complex to the simplest. This is because EndNote looks for matches starting from the top of the window working down the list of tags. It stops at the first template that matches the tagged data.

> To start a new row immediately below the active row, position the cursor in the Field(s) cell, and press Enter .
>
> To start a new row immediately above the active row, position the cursor in the Tag cell, and press Enter.
>
> To delete a row, highlight the row and select *Clear* from the *Edit* menu.

Cutting, Copying and Pasting Rows (Import Filters and Connection Files)

You may use the *Cut, Copy,* and *Paste* commands to move or duplicate a cell or a row of cells. To do so:

1. Select a row by dragging the mouse across both columns. (Dragging the mouse vertically across more than one row selects a range of rows.)
2. To duplicate the selected row(s) elsewhere in a filter, choose *Copy* (Ctrl + C) from the Edit menu. If you want to delete the selected row and move it to another location, choose *Cut* (Ctrl +X).
3. Click where you would like the cut or copied row to appear, and choose *Paste* (Ctrl +V) from the Edit menu. The pasted row will be inserted above the row where the cursor is. If the cursor is in the Field(s) column, the pasted row will be inserted below. (Pasting when an entire row is selected will replace the row.)

Copying and Pasting Between Reference Type Templates

By choosing *Select All* (Ctrl +A) from the Edit menu, you can select all of the rows in a given Reference Type template. This is useful for copying an entire template to a new reference type or filter. After copying the entire set of templates for a reference type, you may choose a different reference type from the Reference Type list at the top of the window, click in the Tag cell for the new reference type, and choose *Paste.*

When you copy information from one reference type (such as Journal Article), and paste the rows into another reference type (such as Newspaper), the field names automatically change to reflect the names used by the new reference type. If there is not a corresponding field name in the new reference type, the original field name in the template is replaced with { IGNORE}, indicating that the data for that tag will be ignored.

Literal Text vs. EndNote Fields (Import Filters and Connection Files)

When you look at a filter, you will notice that some of the templates contain information other than EndNote field names. For EndNote to identify which data should go into a particular EndNote field, you must include punctuation and any literal text or spaces that appear in your data file. Punctuation and literal text act as delimiters allowing EndNote to parse the data into multiple EndNote fields. None of these "delimiters" actually gets imported into an EndNote library, they merely serve as guides for EndNote to correctly import the data.

Here is an example of a data file's source line (SO:) where, in addition to punctuation, there is literal text such as "v", "n" and "p" preceding the data:

SO: Youth Theatre Journal. v6 n4 p3-6

The "v", "n" and "p" are considered literal text because they are not EndNote field names; they represent the literal text from the data file that precedes the data that you want to import. In this particular source line, there are four different pieces of information: the journal name, volume, issue, and pages. To help EndNote determine when one field ends and the next one begins, you must insert the literal text, punctuation, and spaces found in the data file next to the appropriate field name.

As a result, the above SO: tag line should be represented in a filter like this:

Tag	Field(s)
SO:	Journal. vVolume nIssue pPages

In some databases, you may find lines of data that include a word that is also an EndNote field name. The following source line contains the word "pages" before the page numbers:

SO: Town-planning-review. vol. 62, no. 4, pages 461-469.

If entered into the filter, EndNote would normally interpret the word "pages" as a field name. (This is true whether you type it in the filter or insert it using the *Insert Field* list.) To force EndNote to read a field's name as literal text, surround the name with accent grave characters, as in ` pages`. The accent grave character is found in the upper left corner, under the tilde (~) key of the keyboard. To match the SO: line shown above, the source line in the filter should appear as:

Tag	Field(s)
SO:	Journal. vol. Volume, no. Issue, ` pages` Pages.

The { IGNORE} Field (Import Filters and Connection Files)

There may be pieces of information in a line of data that you do *not* want imported into your EndNote library. To force EndNote to ignore pieces of information, use the Insert Field list to insert "{ IGNORE}" in the appropriate place. For example, suppose you want EndNote to ignore bracketed text that sometimes follows the title of an article:

TI: Research funds are dwindling. [letter]

You should add a new TI tag and template to your filter (above the existing "TI: Title" line) that looks like this:

Tag	Field(s)
TI:	Title. [{ IGNORE}]

The Source Line (Import Filters and Connection Files)

The source line is typically the most complex line of data in a record because it contains all of the information about the source of publication. For a journal article, the source line may contain the journal name, the volume number, the issue number, page numbers, and the year of publication. For a book, the source line may contain the publisher, the city, and the number of pages.

The source line in your filter must match exactly the source line in the data file in order for EndNote to distinguish one piece of information from another. You will often find more than one variation of a source line for a given reference type in a single data file, in which case you will need to create a separate source line for each variant, starting with the most complex source. The three source lines displayed below come from a single database:

SO: Semin-Oncol. 76(3):465-71 1998

SO: Semin-Oncol. 127:5-24 1999

SO: Eur-J-Cancer. 118/6 (654-657) 1998

In the first SO: tag line, parentheses enclose the issue number "(3)". In the second SO: tag line, there is no issue, so a colon separates the volume number and the page numbers "127:5-24". In the third SO: tag line, a slash separates the volume number and the issue number "118/6", and parentheses enclose the page numbers "(654-657)".

Each variant in the data file's source lines must be defined in your filter. Since EndNote tries to match the source line in the data file with the first defined source line in your filter, you should place the most detailed source line first, followed by progressively less detailed source lines.

The filter for the above source lines should look like this:

Tag	Field(s)
AU:	Author
TI:	Title
SO:	Journal. Volume(Issue):Pages Year
SO:	Journal. Volume/Issue (Pages) Year
SO:	Journal. Volume:Pages Year
KW:	Keywords

Note: If the filter fails to match a variation of the source line for a journal article, it is possible to have EndNote interpret the data on its own. See Source Parsing.

The Reference Type Tag (Import Filters and Connection Files)

A reference type tag identifies the kind of work or publication being referenced in a particular record in your data file. In the Filter window, a reference type tag is only defined by the characteristic of having literal text, and no fields, entered into the field column. This literal text is not imported into EndNote, but it is used only to identify a record's reference type.

Although a reference type tag can be any tag at all, two common reference type tags are " DT" and " PT" (which stand for Document Type and Publication Type).

JN- Am J Occup There; 47 (11) p998-1008| CP- UNITED STATES| PY- Nov 1993| SN- 0272-9490| JC- 304| CN- MCJ-009105| LA- ENGLISH| DT

To ensure that EndNote imports the data into the correct reference type, you must type the Reference Type tag in the Tag column, and the reference type name (or other identifying text) exactly as it appears in the data file in the Field(s) column. (The matching is case-sensitive.) The Reference Type tag can be placed anywhere in the appropriate Reference Type template.

When EndNote imports a record, it first scans the data file, looking for a reference type tag in your filter. Then it looks for a match in the record it's importing. The first reference type tag match encountered determines which of the Reference Type templates EndNote will use to parse the record. This match also determines which reference type EndNote assigns the record in the EndNote library.

When entering the Reference Type tag in your filter, the text you enter in the Field cell must be interpreted by EndNote as literal text. A problem can arise when you have text that contains an EndNote field name. For example, the following Reference Type tag contains the field name "Journal":

Tag	Field(s)
DT:	Journal Article

Because the field name "Journal" appears in the template, EndNote will not interpret this DT- tag line as the Reference Type tag. Instead, the filter would import the word "Journal" (from the data file's DT: line) into the Journal field.

To force EndNote to interpret the word Journal (or any other field name) as literal text, put an accent grave character at the start and end of the word. (The accent grave character is found in the upper left corner of the keyboard, under the tilde (~) key.) The above Reference Type tag should appear in a filter as:

Tag	Field(s)
DT:	`Journal` Article

If the database you use does not specify a Reference Type tag, all reference types in your data file will import as the default reference type (see Reference Type).

Fields with Special Characteristics

Certain EndNote fields contain special restrictions on what sort of data can be imported. These settings cannot be modified and apply to all import filters.

Author Fields
The words "And Others" get converted to "et al" and the word "and" is omitted. Years as well as parenthetical or bracketed text are removed by default. See Author Parsing.

Year
Only 4-digit numbers (1### or 20##) are imported. You *cannot* import references that have a date of 2010 or later in EndNote X2 and previous versions of EndNote.

Title
The following punctuation is removed from the end of a title:
Period, comma, semicolon, colon, forward slash, back slash, opening parenthesis, dash, and caret.

Pages
A "P" or "p" before the number is automatically removed.

Volume
A "V" or "v" before the number is automatically removed, as is a number that appears to be a year.

Issue
An "N", "No" or "No." before the number is automatically removed (this is not case sensitive).

When Punctuation Repeats Within a Field (Import Filters and Connection Files)

A special formatting character called a "vertical bar" (|) can be placed in a filter to indicate a repeating separator within a field. For example, you may have a data file where a period followed by a space separates a journal name from the volume. However, in some cases, this separator is part of the journal name itself, with the result that a period and a space cannot be reliably used to distinguish a journal name from the volume. For example:

SO: Science. 10 (3): p. 80-90

The above source line would be defined in a filter as:

Tag	Field(s)
SO:	Journal. Volume (Issue): p. Pages

Another source line in the same data file might look like this:

SO: Proc. Nat. Acad. Sci. 13 (2): p. 34-45

The problem arises in the second source line where the separator between the journal and volume (period and a space) is found repeatedly within the journal. The SO: line in the filter instructs EndNote to import the data up to the period and space into the Journal field. Consequently, EndNote would parse `" Proc."` as the journal name, and everything after the period up to the open parenthesis as the volume, so the volume would be `"Nat. Acad. Sci. 13"`.

There is a way to indicate a repeating separator within a field in the filter. If you place a vertical bar (|) before the separator, this instructs EndNote to read up to the last occurrence of this separator. In the example above, if we place a vertical bar before the repeating Journal field separator (period and space), the SO: line in the filter would look like this:

Tag	Field(s)
SO:	Journal|. Volume (Issue): p. Pages

This SO: line in the filter instructs EndNote to import all the data with the period followed by a space separator as a journal. Here, EndNote would import `" Proc. Nat. Acad. Sci."` as the Journal, and "13" as the Volume.

The Filter Options

The Filter Options (Import Filters and Connection Files)

The remainder of the options listed in the Filter window below *Templates* provide the tools for fine tuning your filter. These options include, among other things, how author names should be interpreted, how text is indented in your data file, and which characters should be omitted when you import records into an EndNote library.

EndNote's "Smart" Settings

When possible, EndNote provides a "Smart" option for your choices in configuring the filters. Wherever you choose a "Smart" option, it means that EndNote will do it's best to interpret the data. If you do not know exactly how the reference is configured in the data file, or if there is a lot of variability among the format of the references, then the Smart options are probably going to be the most reliable settings. In cases where the "Smart" option does not work for your data file, you may try the other options provided for that particular setting.

These topics describe the various filter options:

Author Parsing
Continuation Lines
Reference Type

Field Editing
Record Layout
Source Parsing

Author and Editor Parsing (Import Filters and Connection Files)

Use the *Author Parsing* panel to specify how author names are arranged in your data file. These settings apply only to authors in EndNote's main (Generic) Author field. The *Editor Parsing* panel applies to editors, translators, and other authors that are in EndNote's Generic Secondary Author, Tertiary Author, and Subsidiary Author fields.

Name Order

Use the "Name Order" settings to specify the order in which first and last names are arranged in the data file. Examples appropriate to each setting are shown below:

Last Always Precedes First

AU: Smith, J.; Caton, K.; Jordan, L.

First Always Precedes Last

AU: J. Smith, K. Caton, L. Jordan

Name Order is Inconsistent

AU: Smith, J., K. Caton, L. Jordan

Interpreting First Names

The "Interpret First Names as" option allows you to specify exactly how EndNote should interpret the part of the author name that it has identified as the first name or initials.

The default is set to *Smart*, which uses the following rule: If there are three or fewer contiguous uppercase letters, these letters are imported as initials. Otherwise, the letters are imported as a whole name. For example, if the author's name appears in the data file as:

AU: Childs, Jackie D

Smart parsing will interpret "Jackie" as the first name, and "D" as the middle initial. This author name would import as:

Author:
Childs, Jackie D.

If the author's name appears in the data file as

AU: von Braun, ED

Smart parsing will interpret ED as initials; thus the author name would import into EndNote as:

Author:
von Braun, E. D.

EndNote would only import ED as a first name "Ed" if you selected the *Whole Names* option.

The *Whole Names* and *Initials Only* options should only be used in special cases. The *Whole Names* option should be used in the case where the authors in your data file are all uppercase, and full names are used. This option prevents EndNote from converting names consisting of two or three uppercase letters, as in "SUE" or "AL" to initials. For example, if the author's name appears in the data file as:

AU: TOBIES, SUE

the *Whole Names* option would correctly import the author's first name as "Sue." By contrast, EndNote's *Smart Parsing* would interpret the whole name SUE as three initials, as " S.U.E." Likewise, if you select *Initials Only*, EndNote imports all first names as initials only. You would only choose this latter option if the all the first names in your data file are initials.

Author Name Separators

The Author Name Separators tell EndNote how to extract the individual authors from a line containing several authors.

Between Authors

The "Between Authors" option refers to the punctuation that is used to separate individual author names. It is extremely important that this setting is correct so that the author names import correctly into EndNote. Author names in an EndNote references are listed one name per line.

The default for the *Between Authors* option is set to *Smart*. With this option selected, EndNote looks for a common separator, either a semicolon (;), a carat (^) or a vertical bar (|), and use this delimiter to identify where one name ends and the next name begins.

In this example, multiple authors are separated by a semicolon:

AU: Bunting ME; Hanzlik JR

EndNote's *Smart* parsing recognizes the semicolon separating the two author names and correctly imports them into an EndNote library as:

Author:
Bunting, M. E.
Hanzlik, J. R.

Therefore, in this example, you do not need to change the setting. However, if your data file has a delimiter other than a semicolon (;), a caret (^), or a vertical bar (|) separating multiple authors, you must select another option from the adjacent list. To type any punctuation such as a dash or a slash, choose *Other* and type the character there. A space and a return (where the authors are listed one per line) can be selected directly from the list.

If you choose *Import As Is* from the list, EndNote will not try to separate the names that follow the author tag. Everything that follows that tag in the data file will be imported exactly as it appears in the file.

Last and First Names Separator

Once EndNote knows how to identify an individual author name in a list of authors, it looks at that name and tries to determine what the first name is and what the last name is. The Last and First Names separator is used to do this, along with the Name Order settings.

The default *Last & First Names* setting is *Smart*. With this option selected, EndNote attempts to interpret an author's name based on the following separators: a space, a comma, or a period. In your data file, if the separator used between the last name and the first name is something other than a space, a comma, or a period, you can select a separator from the adjacent list.

Parenthetical Data in Author Field

It is not uncommon for information providers to include additional information about the authors (such as date of birth or institutional affiliation).

AU: Takahashi, J (1944-); Izumi, R (1969-)

When this information is mixed in with the list of authors on the tagged author line, EndNote provides two options for what to do with it.

Discard: All parenthetical information is discarded during the import.

Import Into: All parenthetical data mixed in with the author names is imported into the field that you choose. We suggest that you import it into the Notes field, Author Address, or another custom field that is appropriate.

Note: It is not appropriate for EndNote to import that data into the Author field because it would produce an incorrectly formatted bibliography to have the parenthetical data included with the author names.

Continuation Lines (Import Filters and Connection Files)

In general, EndNote ignores lines of text which do not begin with a tag *unless* the lines of text are continuations of a previous tagged item. We call these continuation lines. Here is an abstract from a data file illustrating the concept of continuation lines (all but the first are considered continuation lines):

```
AB- A single-subject research design that used multiple baselines across
behaviors compared traditional adaptations to computers.
```

Because EndNote only imports tagged lines and continuation lines, it can avoid importing extraneous text that might interrupt a reference, such as your logging on or logging off text. Examples of extraneous lines are:

-->>Press any Key to continue

<Record 5 of 42>

EndNote provides two general options for dealing with continuation lines:

Ignore Indents: Untagged lines are always a continuation of the preceding line

With this option set, every line of text in the data file will import according to the tags that are defined in the *Templates* panel. Do not choose this option if there is any text in your data file that is not tagged. If you use this option and do not want to import certain tagged lines, you must use the "{ IGNORE}" option (see The Ignore Field).

Continuation lines must be indented

This option allows you to specify the exact number of spaces on the left margin for the continuation lines.

The following example is an abstract where the first line of data is indented four spaces from the left margin, and the continuation lines are properly indented four spaces. EndNote's default *Smart Indent Identification* would import this abstract correctly. (Spaces are shown as periods for clarity.)

```
AB-.Two experiments compared the performance of 23 12 yr ....old
dyslexics with that of 8 age-matched controls on a ....battery of tests
of motor balance. A dual-task paradigm ....was used: Ss performed each
test as a single task and as ....a task concurrent with a secondary
task. In all single- ....task conditions there was no difference between
groups.
```

However, you may find data files where the continuation lines are not aligned with the first line of data. In the following example, the continuation lines are indented two spaces from the left margin, whereas the first line is indented four spaces:

```
AB-.Beyond the inevitability of countertransference feelings ..is the
question of countertransference enactments. From a ..two-person,
participant-observer or observing-participant ..perspective, enactments
are inevitable. The analyst becomes ..influenced by the patient (and
influences the patient as ..well) and enmeshed in the patient's
internalized ..interpersonal configurations.
```

For EndNote to treat the subsequent lines as continuation lines in the preceding example, the filter must specify the exact number of spaces indented on the left margin. In the example just given, you would enter "2" in the "Indent _ spaces" option.

If most of the lines in a data file import a fixed number of spaces (like two spaces in the example above), but one tagged field is indented differently (perhaps keywords are indented four spaces), you can enter exceptions in the table provided. Simply enter the number of spaces in the left column next to the tag. You only need to enter a number for the tagged field with the inconsistent import. All other lines that are left blank will use the general indent setting.

Note: For a quick and reliable way to count how many spaces are inserted on the left margin, turn on the setting in your word processor to display formatting characters.

Reference Type (Import Filters and Connection Files)

Default Reference Type

The default reference type tells EndNote which reference type to use if it cannot identify the reference type of a record. For example, suppose that in one filter, you specify Journal Article as your default reference type, and create a template for it. If you import a data file containing conference proceedings records for which you have not defined a Reference Type template, any conference proceedings records will import as Journal Articles. Also, if the database that you use does not specify a Reference Type tag, all reference types in your data file will import as your default reference type. (See The Reference Type Tag for information about defining the reference types tag in a template.)

Note: The default reference type is always indicated with bold text in the *Reference Types* list on the *Templates* panel.

Identifiers

Some information providers, such as Ovid Technologies, Inc., provide a button on their web site to allow EndNote users to send search results right from the Web page to the EndNote library. In this case, there is no need for you to go through the extra steps of saving the information from the web site to a text file, and then using EndNote's *Import* command to pick a filter and import the text file. All of that happens behind the scenes.

These identifiers are also used to import data files that contain references from multiple databases. EndNote can import multi- source files like that as long as each record in the data file has a vendor and a database tag at the start of the reference. The identifiers must also be entered into the appropriate filters in the Filters folder. When you are ready to import a file that has data from multiple sources in it, be sure to choose the *Multi-Filter* import option in the Import dialog.

The way that EndNote is able to know which filter to use is by these Identifier tags entered into the filter. Both identifiers must be used. The first identifier should be the tag that includes the name of the information provider. For this example it is " VN." The exact text that follows that tag for each record should be entered into the corresponding box in the Identifiers section. The next tag is used to identify the database, such as Medline or BIOSIS. Enter the tag used for the database name, and then enter the database name exactly as it appears in each reference.

For example, for EndNote to read in this data:

```
<1>
VN     Ovid Technologies, Inc.
DB     Ovid MEDLINE
AU     Jacobson, R; Campbell, S.
PY    1999
etc.
```

For Vendor Identification, enter the Tag " VN" and the Text " Ovid Technologies".
For Database Identification, enter the Tag " DB" and the Text " Ovid MEDLINE".

Field Editing (Import Filters and Connection Files)

Converting Text from Uppercase to Lowercase

If the text in your data file appears entirely in uppercase letters, EndNote can convert the text to either *Sentence*, *Headline* or *Lowercase* format, depending on which option you specify in the *Field Editing* panel.

To control the lowercasing of a field, select the appropriate field from the "Field Editing for:" list at the top of the window. The EndNote fields are listed here by their Generic names. (For a list of reference type fields and their corresponding Generic field names, see the Generic Reference Type.) Then pick a capitalization option from the "Change UPPERCASE text to:" list.

For example, a title that appears in a data file as "COMPOST AS A HUMAN NUTRIENT AND HORMONE CARRIER" would import in *Headline* capitalization as:

Compost as a Human Nutrient and Hormone Carrier

or in *Sentence* capitalization as:

Compost as a human nutrient and hormone carrier

To keep a field's text entirely in uppercase characters, choose the *Do NOT Lowercase* option.

You can apply lowercasing on any field as long as *all* the text in the field is uppercase. If any of the text in the field is in mixed case, EndNote will import it in mixed case.

The Author, Editor, and Translator fields are treated differently from all other EndNote fields. Upon importing author fields into an EndNote library, these fields are automatically converted from uppercase to headline. Due to the special characteristics of these particular fields, the option to change the case is not available in the *Field Editing* panel.

Omitting Unwanted Characters

Some lines of data have superfluous characters, such as an asterisk (*) or a dash (-), that you may not want to import. For example, in the following lines of data there are dashes in the journal name, and there is an asterisk before each keyword:

SO- American-journal-of-preventive-medicine; 12(9)

DE- *COMPUTER SYSTEMS DESIGN; *DISPLAY DEVICES; *INTERFACES

To prevent unwanted characters from being imported into your EndNote library, use the *Field Editing* panel to specify the characters that you want to omit:

1. List of Reference Types.
2. Type the unwanted text in the "Enter text to be omitted (one item per line)" box, and then click *Add* to add it to the omission list.

When you prevent characters from being imported into an EndNote field, you are omitting the characters from the corresponding Generic field, so the omission applies to every reference type field that corresponds to the particular Generic field. For example, the Secondary Title field corresponds to both the Journal field in a Journal Article reference type and the Series Title in a Book reference type. Therefore, if you omit a dash (-) from the journal name, any dashes found in a Series Title for a Book reference type will also be omitted.

Each item that you want to omit should be entered on a separate line. For example, let's say that you wanted to omit both underscores (_) and forward slashes (/) from your records' keywords. First add the underscore, and then add the forward slash. Entering both items on the same line would cause EndNote to omit only instances of "_/", while all other instances of underscores and forward slashes would end up in your keywords. You can omit up to 254 characters per EndNote field.

To remove an item from the list, simply select the item and click *Remove*. You may select more than one item by holding down the Shift or Ctrl key while clicking on multiple items.

Note: The more items added to the list, the longer it takes EndNote to import records into EndNote. To avoid slowing down the importing process, you may want to start by importing the data into an EndNote library without specifying any omissions. Then use the *Change Text* command in EndNote to delete the unwanted words and other text.

Record Layout (Import Filters and Connection Files)

Use the options in the *Record Layout* panel to modify how EndNote interprets the end of a reference in a data file.

Smart Record Identification

Smart Record Identification, EndNote's default setting for Record Termination, creates a new record in EndNote each time a tag in the data file repeats out of sequence *and is preceded by a blank or extraneous line*. EndNote will not create a new record if the same tag appears in succession, provided that they are not separated by a blank line.

For example, some databases list authors one per tagged line, with the AU tag appearing two or more times in succession, as in the following example:

AU- D'Orazio, MG AU- Tamura, TS

When EndNote sees consecutive tags, it does not start a new reference unless it finds the same tag preceded by a blank or extraneous line.

More Specific Record Layout Options

A more precise way of identifying a new record is to specify in your filter exactly how the records are terminated in your data file. The remaining options in the Record Layout panel allow you to do this.

To determine how records are terminated, open your data file in either a word processor or text editor. Check for the pattern consistently separating one record from another. Once you have determined the correct record termination, click the appropriate button on the *Record Layout* panel to select the best option for your data file. You may choose only one option as a record terminator.

Blank line separates records

Choose this option if the only blank lines in a data file are the ones in between references.

Using "First Tag" and "Last Tag" Options

This option lets you specify a first tag that starts the record and/ or a final tag that ends each record. Only one tag is required.

> Before choosing this option as your record terminator, verify that the first or last tag is consistently present in each record. This option will function correctly only if the chosen tag appears in every record.
>
> You do not need to enter both a first and last tag; either tag will suffice to distinguish one record from the next.
>
> Enter the tag exactly as it appears in the data file, including the delimiter (colon, dash, etc.) that follows the tag. EndNote treats these delimiters as part of their respective tags.
>
> You do not need to include these tags in the templates of your filter, unless you wish to import the associated data.

Each record ends with:

Choose this option if your references consistently end with a specific set of unique characters. Note that whatever you enter into this option needs to be unique enough that it does no t appear elsewhere in your references. One common set of characters that is used to terminate each record is "||".

Each record starts with:

Choose this option if your references consistently start with text that is not a tag. For example, it is common for some information providers to begin each reference with a counter such as:

<1>

or

Record 1 of 53

In these cases, enter the text exactly as it appears in the data file, but substitute a number sign (#) for the actual number. For the examples above, you would enter "<#>" and "Record # of #".

Example

The following example illustrates a data file that contains neither a blank line, nor text terminating each record. However, there is a consistent first tag, "ND:" starting each record. So for this example you would want to specify "ND:" as the record termination by clicking the "First Tag" button, and typing "ND:" in the box.

```
ND: 430529953|
BASE: BA83|
AU: HILDEN O^PARTAMAA T|
TI: DEVELOPMENT OF THE RAZORBILL POPULATION OF THE QUARK
IN: 1957-1990|
SO: ORNIS FENNICA^69 (1). 1992. 34-38. ^1992|
LA: English|
SH: CHORDATE TAXONOMY-AVES^BEHAVIOR BIOLOGY-ANIMAL
BEHAVIOR^ECOLOGY-ANIMAL^
01: 1 . 00/000002 DIMDI: - BIOSIS PREV AB /COPYRIGHT BIOSIS|
ND: 93110787|
BASE: BA83|
AU: NAKAZAWA Y^FURUSAWA M^HOHNO H^SHIDA T|
TI: MANUFACTURE AND PROTEOLYTIC PROPERTIES OF YOGURT FROM
MILK CONCENTRATED BY ULTRAFILTRATION|
SO: LEBENSMITTEL-WISSENSCHAFT & TECHNOLOGIE^24 (6). 1991.
491-494. ^1991|
LA: English|
```

Source Parsing (Import Filters and Connection Files)

The source line refers to the line in the data file that represents the source information for the journal (typically journal, volume, issue, pages, and sometimes the year). It is most often the most complex and inconsistent line of data in your data file—and it is also the most important. As a result, the EndNote filters provide a sort of safety net to catch inconsistently entered source data.

The tags and templates defined in the *Templates* panel are used first to import source data. If a source line in a data file does not match any of the options in the templates, then EndNote provides you with additional options for how to handle that. The first thing you need to do is to make sure that EndNote has correctly identified the journal article source tag.

Identifying the Source Tag

If the source tag for the Journal Article reference type in the *Templates* section of a filter is SO or JN, EndNote automatically identifies this tag as the source tag. However, if the source tag defined in your filter is something other than a "SO" or " JN", you must choose the appropriate tag from the *Journal Article Source Tag* list. (All of the tags that have been defined in the Journal Article template will appear in the "Source Tag" list.)

When source data and filter templates do not match

If a journal article's source line in your data file does not match a source line in your filter, you can choose how EndNote should treat the unmatched source line. The default option is *Use Smart Parsing*. EndNote's *Smart Parsing* does its best to distinguish the journal name, the volume number, the issue number, the page numbers, and the year, and import each into the corresponding EndNote field. Any information that is not identified as a journal, volume, issue, pages, or year is imported into the Notes field, along with the comment "Using Smart Source Parsing." (After importing, if you suspect that some references may not have matched the defined source template, it is helpful to use EndNote's *Search* command to search for the text "Using Smart Source Parsing" in the Notes field of the imported references. You may then check those specifically to see if EndNote correctly interpreted the data.)

If you choose the other option to import the source data into a separate field, EndNote does not attempt to parse the source information, and instead imports the entire unmatched source line into whatever field you have specified.

For any reference type other than a Journal Article, unmatched source lines are automatically imported into the Notes field. Therefore, if you have not defined an exact match for a source line found in a book record in your data file, EndNote imports the entire source line into the Notes field.

Importing MARC Records

What Are MARC Records?

"MARC" stands for Machine Readable Cataloging format. It is a standardized format developed by the Library of Congress for producing machine-readable bibliographic records. It is much more difficult to read than regular tagged data formats, but it can still be imported in much the same way using EndNote's filters.

The MARC Format and Connection Files

Many connection files use the MARC format because it is specified as part of the Z39.50 standard. When creating a new connection file, the *Templates* and *MARC Records* portions of the connection file are automatically set up to import standard USMARC (MARC21) data. If you need to customize these parts of the connection file, the instructions in this section would apply.

Unique Aspects of MARC Records

MARC records differ from other bibliographic records in two important ways:

Numeric Tags

The primary way in which MARC records differ from non- MARC bibliographic records is in their reliance on numeric tags. Numeric tags typically consist of three digits followed by two spaces and two more digits. For example:

```
245 10   $a When you realize you have too many
kids: $b a guide / $ c Hugh B Dunn.

245 14   $a The angel with a dirty mouth /$ c Nick
Steel ; illustrated by Melissa Fips.
```

Subfields

The second way in which MARC tags differ from other bibliographic records is the use of subfields.

Each numerically tagged line in a MARC record may contain any number of subfields. A subfield typically consists of two consecutive characters, the first of which is the subfield delimiter which denotes the start of a new subfield. Examples of subfields are "$a" and "$x." The subfields do not have to be consecutive, as in the second record in the example above.

If you were creating a conventional filter for importing bibliographic records from a MARC database, you would have to anticipate a vast number of possible combinations, both of tags and of subfields.

Because it is difficult to anticipate every possible combination of tags and subfields in MARC records, EndNote provides you with a simplified way of creating filters for MARC records. The two sections that follow tell you how to create a filter specifically for MARC records, and then alert you to the different rules that EndNote uses when importing MARC records into an EndNote library.

Creating a Filter for MARC Records

Once you have created a new filter, or you have opened an existing filter, select the *MARC Records* panel in the Filter window.

Click the "Process data file as MARC record" check box. The dollar sign ($) will appear in the "MARC Subfield Delimiter" box, since this is the subfield delimiter in most cases. If the subfield delimiter is something other than a dollar sign, delete the dollar sign and type in the appropriate delimiter.

Data Start Column

The reference data in a MARC reference normally starts in column 8 (that is, the sixth character from the left margin). If the MARC records in your data file start the actual reference data (as opposed to tags and subfield delimiters) in some other position, enter that number in the text box for *Data starts in column*.

Accession Numbers

The Accession Number is a unique number assigned to each record in a database. (The information provider's database; not the EndNote database.) The provider may not call it an Accession Number; PubMed uses PMID, and some systems use "unique identifier." These numbers sometimes appear immediately after the numeric tag, and without the two-digit subfield codes seen in other MARC fields. Since a common type of accession number often appears after the 001 tag, EndNote includes an *Import "001"tags as Accession Numbers* check box which lets you import this number into EndNote's Accession Number field. Accession numbers which appear in lines other than 001 often begin with a subfield, so you can set up the filter to import the number into the Accession Number field.

If first field has no subfield delimiter:

Normally the first character that precedes the record data is the subfield delimiter (commonly a dollar sign $). If this subfield delimiter is not present for the first field of each tagged line, you will need to tell EndNote how to interpret the first character by checking the appropriate option under the MARC records dialog. Is it part of the real data of a reference or is it a field designator (such as "a" or "b") that just happens to be missing the subfield delimiter?

Rules for MARC Import Filters

EndNote observes these rules when importing MARC records:

EndNote allows you to specify only the first three digits of the tag when designing a filter for MARC records. You can disregard spaces and digits appearing immediately after the first three digits. The tag for both of the following examples would be 245.

```
245 10  $a When you realize you have too many
kids: $b a guide / $ c Hugh B Dunn.
```

```
245 14  $a The angel with a dirty mouth /$ c Nick
Steel ; illustrated by Melissa Fips.
```

You do not have to define all the subfields in a tagged line. There may be some subfields that contain information you do not want to import into your EndNote library. EndNote will ignore any subfields that are not defined in your filter.

Source lines cannot take advantage of the "Smart Source Parsing" option. You may, however, enter multiple variations of the subfields in a source line. Be sure to enter all subfields *after the same tag* (do not repeat the tag for each), and list the most complex subfield formats first. For example:

```
773 $ gVolume(Issue), p. Pages$gVolume, p.Pages
```

With the exception of the reference type tag, EndNote allows you to define a tag only once; therefore you should include all of the subfields that contain data you want to be imported. For example, the following line in a filter for MARC records would successfully import any or all of the three lines that follow:

Tag	Field(s)
245	$a Title $b Title $c Notes

```
245 14  $a The hollow horn : $b Bob Dylan's
reception in the United States and
Germany / $c by Dennis Anderson.

245 10  $a Bob Dylan, spellbinding songwriter /
$c Nathan Aaseng.

245 00  $a Down in the groove.
```

Modifying an Existing Filter

Example: Modifying an Existing Filter

Modifying an existing filter is useful if you want to create a new filter for a different database by the same provider. Although some information providers offer radically different formats for their different databases, there are others who provide fairly consistent tags and organized data across their databases.

Common reasons for editing a filter include adding a tag to import additional information; removing a tag or using { IGNORE} to omit unwanted data; or fine-tuning the current settings for importing authors or journal source data. The specifics about how to work with templates and options are described earlier in this chapter. This example is intended to provide a general overview of the process of editing a filter.

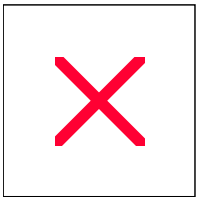
Adding a Tag and Field to a Filter

Let's say that you want to modify a filter to import the language of the publication into EndNote's Notes field. In this particular database, the language is preceded by the tag "LA-".

```
TI- Zum beginn des mathematischen Frauenstudiums i Preussen. |
TI- <Translated> The beginnings of mathematical studies for women in
Prussia |
AU- Tobies. Renate
JN- NTM Schr. Geschichte Natur. Tech. Medizin |
SO - < JN> NTM Schriftenreihe fur Geschichte der Naturwissenschaften
Technik und Medizin |
SO- < PY> 1991 |
SO- < VO> 28 |
SO- <NO> no. 2, |
SO- < PG> 151-172. |
LA- German |
DT- Journal |
```

To add the LA tag and direct its contents to the Notes field:

1. In the Filter Manager, select the filter that you want to edit and click *Edit.*
2. Select the Templates option in the left pane of the window.
3. Click the mouse in any cell of the Journal Article template, and press Enter to create to a new row.
4. Type LA- in the Tag cell, then press a Tab to move to the Field cell. Insert the Notes field from the *Insert Field* list. Doing so tells EndNote to import the language information into EndNote's Notes field.
5. You can add the LA- tag to the remaining Reference Type templates in the filter. Use the *Reference Type* list to switch to each reference type template in your filter and repeat the process described above. (Reference types with check marks next to them in the list are the ones that have templates defined for them.
6. Choose *Save As* from the File menu, give the modified version of the filter a new name, and click *Save*.



Creating a New Filter

Creating a New Filter

This topic provides a general overview of how to create a new filter. You can view an example of a data file, and the templates portion of a filter to match it (see Example Data File and Templates).

The basic steps to create a new filter are:

1. From the Edit menu, choose *Import Filters* and select *New Filter*.
2. If you would like, you may enter a category for the filter (usually the information provider is used for the category), and any other comments about what the filter is based on or what data it is used to import.
3. Click on the *Templates* option.
4. From the *Reference Types* list choose the first reference type that you would like to define, and enter the necessary tags and the corresponding fields into the reference type template. See Working with Filter Templates.
5. Define additional reference types, as necessary, by selecting them from the *Reference Types* list and entering the tags and fields for them as well.
6. Click on the *Reference Type* option in the list of panel names, and choose the default reference type for the filter.

At this point, you may have entered enough information to use the filter successfully. Try it out by choosing it as the import option to import your data file into a new, empty library. Review the imported references to be sure that they imported correctly. Fine tune the filter as necessary (see The Filter Options).

Note: If you need a reference type that does not appear in the *Reference Type* list, see Adding and Deleting Reference Types.

For additional help, see Tips for Entering Tags and Fields and Example Data File and Templates.

Tips for Entering Tags and Fields

Not every tag in your data file needs to be in your filter.

There is no need to define every tag that appears in your data file, provided that the contents of the corresponding field start on the same line as the tag itself; and the records' continuation lines are not flush left. If you need to define every tag that appears in a record, but only want to import the information associated with certain tags, insert the { IGNORE} field from the Insert Field list where appropriate.

Note: You do not need to specify all data fields, *unless* each tag appears on a line by itself, with the data starting below it on the next line. You may also want to specify all tags if the continuation lines in your records are flush left, in which case an undefined tag appearing immediately after a continuation line will be read in as text.

You might need to enter multiple variations of a source line.

You will often find more than one variation of a source line for a given reference type in a database, in which case you will need to define a separate source line in your template for each such variant. The most complex

source line should appear first, followed by source lines of decreasing complexity. In the case of Journal Articles, be sure to specify the appropriate *Source Parsing* option (refer to Source Parsing).

MARC formats are an exception. See Rules for MARC Import Filters.

A colon, dash, space or other character that appears along with a tag is treated as part of the tag.

When defining tags in a filter, these characters need to be included in the tag column of the filter for EndNote to find an exact match. If spaces are inserted within a tag, as in "SO- < VO>," they need to be defined as part of the tag as well.

Example Data File and Templates

Below is a sample of a record in a data file and the filter *Templates* panel configured to import the data. See Working with Filter Templates for details about configuring templates.

Sample Record from a Data File

```
FN- DIALOG MEDLINE file 155
AN- 08791562|
AN- < NLM> 94106562
TI- Adaptive computer use for the visually
impaired
AU- Buning ME; Hanzlik JR|
CS- School of Occupational and Educational
Studies, Fort Collins, Colorado.|
JN- Am J Occup There; 47 (11) p998-1008|
CP- UNITED STATES|
PY- Nov1993|
SN- 0272-9490|
JC- 304|
CN- MCJ-009105|
LA- ENGLISH|
DT- ANALYTIC: SERIAL|
JA- 9404|
SF- INDEX MEDICUS|
AB- A single-subject research design that used
baselines across behaviors compared
adaptations ( e.t., the use of readers) to
computer technologies for typical reading|
GS- Case Report; Human; Male; Support, U.S.
Gov't, Non-P.H.S.; Support, U.S. Gov't,
P.H.S.|
DE- *Microcomputers; *Vision,
Subnormal--REhabilitation--RH; Activities|
ID- EC 4.1.1.1  ( Pyruvate Decarboxylase)||
```

Note: The trailing vertical bars at the end of each line will be stripped out by EndNote. *Do not include them in the filter*.

To create a template for the Journal Article reference type:

1. Select "Journal Article" from the Reference Types list.
2. Type TI- in the tag cell, then press Tab to move to the Field column. Insert the Title field using the *Insert Field* button.
3. Press Enter to move to the next line.

4. Type the next tag to import and insert the corresponding field. Continue entering the rest of the tags and fields until all of the necessary information is covered by the filter. Skip any tags for data that you are not interested in importing.

This is what the resulting *Templates* panel of the filter should contain:

Tag	Field(s)
AN-	Accession Number
TI-	Title
AU-	Author
CS-	Author Address
JN-	Journal; Volume (Issue) pPages
PY-	Date Year
SN-	ISSN
DT-	ANALYTIC; SERIAL
AB-	Abstract
GS-	Keywords
DE-	Keywords

Note: It is important to remember that the source line in a filter must exactly match the source line in the data file for EndNote to distinguish one field from another. You will often find more than one variation of a source line for a given reference type in a database, in which case you will need to create a separate source line for each variant in your download, starting with the most complex source line and ending with the least complex source line. As a backup, select the appropriate Source Parsing option.

Connection Files

Introduction to Connection Files

Introduction to Connection Files

The *Online Search* command on EndNote's Tools menu connects you to online databases and library catalogs so that you can search them from within the EndNote program and retrieve references directly into EndNote. EndNote is able to make these connections using the information stored in the hundreds of individual "connection files."

This section describes how to edit and create these connection files. The process of using the *Online Search* command is described in Quick Overview (Online Searching).

EndNote provides thousands of connection files for a variety of sources. By default, the 100 most popular connection files are stored as individual files in the Connections folder in your EndNote program folder. To install additional connection files, see Installing Additional Connection Files.

What is a Connection File?

A connection file contains all the information necessary to connect to, search, and import references from an online database or online library catalog. Each connection file represents a different online database (such as the Library of Congress or PubMed from the National Library of Medicine).

The connection files are located in the Connections folder in your EndNote folder. You can view all of the available connections by choosing *Connection Files* from the Edit menu and selecting *Open Connection Manager.*

The Connection Manager

EndNote provides hundreds of connection files for a variety of sources. By default, the 100 most popular connection files are stored as individual files in the Connections folder in your EndNote program folder. To install additional connection files, see Installing Additional Connection Files.

To peruse the list of available connection files in EndNote's Connections folder, choose *Connection Files* from the Edit menu, and select *Open Connection Manager.*

The Connection Manager lists the names of all of the original connection files available in the Program Files\EndNote X4 \Connections folder as well as any new or modified connection files in your personal Connections folder, and gives you the options to edit them or select them as "favorites" for quick access when you use the *Online Search* command. You can click and drag the corner of the dialog to increase the size.

Use these features to locate the connection file you want to use:

If you know the name of the connection file that you want to use, start typing it to select the first file that matches what you type.

Click the *Find by* button and choose an information provider's name (such as Ovid or SilverPlatter) to find only the connection files for a specific information provider.

Click the *Find by* button and choose *All Connections* to return all of the connection files to the displayed list.

Click the column headings to sort the connection files by name or by information provider. Clicking the same column heading a second time will change the sort order from ascending to descending. Click again to set it back to ascending order.

Click the *More Info* triangle button at the bottom of the dialog to display additional information about the selected connection file. Or, click *Less Info* to hide the additional information.

Marking Your Favorite Connection Files

When you have found a connection file that you will want to use in the future, click the check box next to it to mark it as a favorite. All connection files that are marked as favorites (up to 500) appear as an Online Search group in the Library window. This gives you easy access to the files you use most often.

An easy way to mark a whole category of connection files (such as all of the connections for Ovid databases) is to click the *Find by* button , choose a category from the list, and then when all of the files for that category are showing, click the *Mark All* button.

Editing Connection Files

If you would like to modify a connection file, select it in the list and click *Edit.* See the Related Topics list below for topics about how to work with connection files.

Installing Additional Connection Files

The EndNote team has developed thousands of different connection files. Because installing all of these files may slow performance, a typical EndNote installation includes only the 100 most popular connection files. You can install sets of connection files by provider with the EndNote installer , or you can download individual connection files from the EndNote web site.

Using the EndNote installer to install additional connection files

First, make sure EndNote is closed and not running. You can run the EndNote installation program again, choose the option to Modify the installation, and then select sets of connection files to install.

To install sets of connection files:

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. Do one of these:

   Start the EndNote installation program as you would for a new installation.

   Or, from the Windows Start menu, select *Control Panel,* or choose *Settings* and then *Control Panel*. Then, choose *Add or Remove Programs*. In the list, click on EndNote X4 and then *Change*.
3. On the “Application Maintenance” dialog, select the *Modify* option and click *Next*.
4. On the “Select Features” dialog, click the plus sign (+) next to Additional Connections.
5. For each set of connection files you would like to install, click the triangle and select either "Will be installed on local hard drive" or "Entire feature will be installed on local hard drive."
6. Click *Next* to continue with the installation.

The filters will be copied to the EndNote Connections folder, which is typically Program Files\EndNote X4 \Connections.

Finding individual connection files on the EndNote web site

You can use the Connection Manager in EndNote to find and download individual filter files.

To download individual connection files:

1. From the Edit menu in EndNote, choose *Connection Files* and then *Open Connection Manager*.
2. Click *Get More on the Web* to start your default browser and go to the appropriate page on the EndNote web site.
3. Click *Accept* to accept the Terms of Use.
4. Browse through an alphabetical listing of the available connection files, and *Download* those files you want to install.

5. Copy the downloaded files to your Connections folder, which is typically located at Program Files\EndNote X4\Styles .

Copying Connection Files

When you display a list of connection files in EndNote, the list is comprised of the installed connection files found in the Program Files\EndNote X4 \Connections folder as well as new or modified connection files found in your personal Connections folder. For an explanation of where your files are stored, see Folder Locations Preferences.

There are two ways to copy connection files. First, since each connection file is a separate file on your hard drive, you can copy them as you would copy any file on your hard drive using the Windows desktop .

Or, to make a copy of a connection file from within EndNote:

1. From the Edit menu, choose *Connection Files* > *Open Connection Manager* to open the Connection Manager.
2. Select the connection file you want to copy and click *Edit.*
3. Without making any changes to the file, choose *Save As* from the File menu.
4. Give this copy of the file a new name, and *Save* it.

The file is saved in your personal Connections folder. The new connection file will remain open. The original connection file will be left untouched.

Saving Connection Files

To save a new connection file that you have just created, or to save changes to a connection file you have just modified, choose *Save* or *Save As* from the File menu.

If you have modified one of the original installed files in the Program Files\EndNote X4 \Connections folder, you must use *Save As* to save a copy to your personal Connections folder. If you have modified a style that is already located in your personal Connections folder, you can choose either *Save* to directly modify the file, or *Save As* to make a copy with the changes. For a description of where your styles are stored, see Folder Locations.

EndNote automatically saves new connection files to your personal Connections folder. You may also specify a different folder if necessary. For instructions see Folder Locations.

EndNote connection files use the file name extension of ". ENZ", as in "Medline (Ovid). ENZ".

Deleting Connection Files

To delete a connection file from within EndNote:

1. From the Edit menu, choose *Connection Files* > *Open Connection Manager.*
2. Select the connection file to be deleted.
3. Choose *Clear* from the Edit menu, or right-click on the connection file and choose *Delete* from the shortcut menu.

You can also delete an unwanted connection file by switching back to the Windows Explorer, or by opening "My Computer," and opening the Connections folder in the EndNote folder. Then, select the file to delete and choose *Delete* from the File menu or drag the file to the Recycle Bin .

Note: You must have read/write access to the Connections folder in order to delete a connection file. If you do not have administrator access, you likely will not be able to delete a file located within the Program Files folder.

Basic Components of a Connection File

Basic Components of a Connection File

Topics describing the basics of a connection file are listed below. This information is useful if you want to modify or create a connection file. To create a new connection file, see Creating Connection Files.

Editing a Connection File
The Connection File Window
"About This Connection" Panel
The Connection Settings
Search Attributes
Filter Information

Editing a Connection File

To edit a connection file:

1. From the Edit menu, choose *Connection Files* and select *Open Connection Manager.*
2. Select the file to edit and click *Edit.*

   The most recently used connection file can also be easily edited by selecting *Connection Files* from the Edit menu, and choosing *Edit <connection file>.*

3. Make your changes to the connection file.

4. **If you are editing one of the original, installed connection files**:

a. Go to the File menu and choose *Save As* (the *Save* command will not be available).

b. Name the file and click *Save*.

If you are editing a connection file that you created or that you have already modified before:

a. Go to the *File* menu and choose *Save* to save changes directly to the file.

EndNote saves the file in your personal Connections folder. For a description of where connection files are stored, see Folder Locations Preferences.

The Connection File Window

After choosing the option to edit an existing connection file or create a new one, EndNote opens the Connection File window.

All of the different areas of the connection file are listed on the left side of the Connection File window. Click on an item to view the associated settings. You may switch between panels as needed while editing the file. No changes are saved in any of the panels until you choose *Save* or *Save As* from the File menu.

To close the Connection Editor window, choose *Close Connection* from the File menu, or click the close button in the top right corner of the window.

"About this Connection" Panel

When the Connection Editor window opens, it displays the *About this Connection* information. This panel contains descriptive information about the connection file, and has no impact on establishing the connection.

Name: Displays the name of the file as it appears in the Connections folder in the EndNote folder. The file name extension (. ENZ) is not displayed. The name of the connection file cannot be changed here; you would need to close this window and switch back to the Windows desktop to rename the file.

Based On: Enter any information about what documentation was used to create the connection file. Commonly the server documentation is available on the Web, so you could enter a URL here to make it easy to later retrieve that information. If this connection file is a modified copy of another connection file, it may be helpful to enter the name of the original file in this field for future reference.

Category: The category is typically the information provider (such as Ovid or SilverPlatter), but you may enter anything that will help you categorize and organize your connection files. The category information is also listed in the Connection Manager window in the column next to the name of the file. In that window, you may sort connection files by category and also search for them by category.

Created: The date the connection file was installed or created.

Last Modified: The date the connection file was last modified.

Comments and Limitations: Enter any useful comments here that would help you remember how to search the online database. Limitations to preconfigured connection files may be documented here as well.

All of the information in this panel is visible in the Connection Manager if you click the *More* information option at the bottom of the Connection Manager window. This is helpful because you do not need to edit a connection file to view the comments or other descriptive information. You may simply scroll through the available connection files in the Connection Manager window and view the information there.

The Connection Settings

Click on *Connection Settings* to view the panel where all the data is stored to establish a connection. The Connection Settings information is *required* for EndNote to be able to connect to the online database. These terms and descriptions are part of the Z39.50 standard.

Server Description: The name of the information provider or institution. EndNote displays this name in the title of the Retrieved References window, and it is also listed in the Connection Manager window. This information is not used to establish the connection.

Server Address: The server address for the online database. This can be either a numerical IP address or a domain name.

Database Description: The name of the online database. This name is displayed in the Title bar of the Retrieved References window to help you identify the database to which you are connected. It is not used to establish the connection.

Database Name: The command used to select the database on the remote server. This is often a four character code.

Element Set Name: This is normally F for "Full" or B for "Brief." The Element Set Name determines the amount of information that is provided by the server for each retrieved reference. Not all servers support both options, and the fields returned for each option also vary.

Port ID: The TCP/ IP port at the server that is used for a Z39.50 connection. For most Z39.50 connections this is port 210.

Batch Download: EndNote typically retrieves references in batches, for speed and memory reasons. However, some servers are too slow, or their record data is too large, to support batch downloads. You will need to turn batch processing off for such sites. If you are having trouble downloading from a site, you can try deselecting this option.

Record Syntax: Many formats used by Z39.50 servers are supported by EndNote, such as UNIMARC (Universal Machine Readable Cataloging), SUTRS (Simple Unstructured Text Record Syntax), and OPAC (Online Public Access Catalog). When you create a new connection file, it is set up for the MARC21 format. For other formats, the filter section for connection files must be constructed manually. UNIMARC and OPAC use variations of the MARC format (OPAC commonly adds holdings data). The SUTRS format, because it is "unstructured," does not have a standard format among different databases. The SUTRS format often uses tags (such as "AU" or "Author") to identify the reference data. Check with your database provider for the appropriate settings.

Text: The *Text* option is used to specify how EndNote should interpret the incoming text characters. Options include ANSEL, Unicode (UTF-8), Unicode (UTF-16), and many other language choices. If you do not have the correct setting, extended characters may import as asterisks, or may be dropped completely. Check with your database provider for the appropriate setting.

Login Information Required: This section is divided into four separate options: User ID, Password, Group ID, and Custom. Select the options required to login to the online database in order to have EndNote prompt you for that information when you connect. You can also store your password and/or IDs in the connection file so that you do not have to enter them each time you connect. Simply type the password or ID into the box provided.

Note: Passwords and IDs may be saved in the connection file for convenience, but do so at your own risk: passwords are not protected or encrypted. If someone else copies or uses your connection file, they will be able to use your stored password.

Custom ID Authentication String

Sometimes a database server requires a custom format for presenting the password and IDs. For these situations, you may skip the regular password or ID option, check the "Custom" option, and enter the text specified by your server's Z39.50 documentation. You may either enter your actual password and ID along with the text, or use one of the following placeholders to have EndNote prompt you for the necessary items: ?PASSWORD, ? USERID, ? GROUPID.

For example, a system may require that passwords be presented by Z39.50 clients in the following manner:

```
pass=?PASSWORD/ dla_ui=yes
```

If you wanted to store your password ("abc123" for this example) it would look like this:

```
pass=abc123/ dla_ui=yes
```

Search Attributes

The Search Attributes section of a connection file contains a table that defines the various search options for a particular database.

> **Search Field Name:** The first column identifies the name of a search. This is the word or phrase that appears in the menus in the Search dialog.
>
> Use EndNote's Generic field names as the search field names whenever possible. Doing so makes it easier to have a search apply to various online sources and local EndNote libraries.
>
> EndNote's preconfigured connection files often use parenthetical text after the search field name to help describe the search, if necessary. This parenthetical text is not considered part of the search field name when you change the focus of the search and EndNote looks for a matching search field name. (See Changing the Focus of the Search. See the Generic reference type for a list of Generic field names.
>
> **Attributes:** The rest of the items in a particular row are the various search attributes that control what index is being used for the search, and how the search term is interpreted.

What is an "attribute"?

A Z39.50 **search attribute** is a value used to define the characteristics of a search term. For example, if your search term is "ebola virus," the various attributes would be sent to the server along with that term to tell the server where to look for "ebola virus" and what qualifies as a matching reference.

Available attributes, as defined by the Z39.50 standard, are:

1. **Use**: The index to be searched (such as Keywords)

2. **Relation**: The relation of the search term to the index (such as equal, greater than, or less than)
3. **Position**: The position of the search term in the MARC record field (first, last, anywhere, etc.)
4. **Structure**: The structure of the term, such as a word or phrase
5. **Truncation**: Available truncation options used to interpret the search term (for example: right truncation, wildcards, no truncation)
6. **Completeness**: Indicates whether or not the search term should be the complete subfield in the MARC record corresponding to the field searched

The "Use" attribute is the most important here, indicating which index will be searched to find the search term. The other attributes will all have varying default values for each online database. These options are most often left blank to use the server's defaults, but the default attribute values can be overridden by entering another value for the attribute.

Each database has its own supported subset of Use attributes and associated combinations of the other attributes. Consult the configuration information for the online database to determine which values for these attributes are supported. Thomson Reuters does not provide this information. You will need to obtain it from the organization (or "information provider") that maintains the server.

Tip for Editing Search Attributes

When modifying the search attributes in a connection file, it is useful to first test the search with the new attribute combination before actually changing the connection file. You can do this by entering the new attribute values using the command-line search method. This lets you test new attribute combinations without having to edit and save the connection file, and reconnect to the server every time you want to test a modification.

Filter Information

The Filter section of the connection file contains the information used to import each reference and get the reference data into the correct EndNote fields.

For most connection files, the filter is set up to interpret references in the MARC format. When you create a new connection file, the Filter section will be set up to interpret references in a standard MARC21 format.

This part of the connection file is identical to the regular Import Filter window. For more information about editing a filter, consult The Filter Manager and Working with Filter Templates.

If the retrieved references are not importing the way you would like, you should compare the filter settings of the connection file to the original text that EndNote receives from the online database. To do so, choose *Show Connection Status* from the *Window* menu when retrieving references. Set the view in the Status window to show *Record Data* and compare the record data to what is in the filter. This record data is also stored in the log file, Connect .log. By default, the Connect .log file is stored in the folder:

Windows XP: C:\Documents and Settings\[UserName]\Application Data\EndNote

Windows Vista : C:\ Users\[UserName]\ App Data\Roaming\EndNote r Folder]:Library:Application Support:EndNote

This file is simply a text file and may be opened in any word processor to view it.

To change the location of the Connect .log file, see URLs and Links Preferences.

Creating Connection Files

Creating Connection Files

Before you begin actually creating or modifying a connection file, you must obtain the Z39.50 client configuration instructions for the database you want to access. Contact your librarian or information provider for this information.

Note: If the database is not available on a Z39.50 server, you will not be able to use EndNote's *Online Search* feature to access it directly. Instead, use the Import feature to import references that have been downloaded to text files.

Once you have the Z39.50 client configuration information in hand, follow these steps to create a new connection file:

Create the File and Enter the Basic Information

1. From the Edit menu choose *Connection Files* and select *New Connection File*.
2. The new Connection File window opens to display the *About this Connection* information panel. Enter any comments or descriptions here for your own use. (These comments do not affect how the connection functions.)
3. Click on the Connection Settings option and enter the connection information.
4. Click on the Search Attributes option to modify the default search attributes if necessary.
5. Choose *Save As* from the File menu. Name the new connection file and save it in your Connections folder.

Test the Connection and Searching

6. From the *Tools* menu, choose *Online Search* and select your new connection file. If the connection cannot be established, check the settings in the *Connection Settings* panel of the connection file, save your changes, and try again.

7. If the connection was established, the Search tab should open automatically. Enter a simple search to see if the search attributes were correctly configured. If the Search does not work correctly or it returns an error, check the *Search Attributes* settings in the connection file. (If you modify the connection file at this point, you must save the connection file, then close the Retrieved References window and reconnect in order for your changes to take effect.)

Test the Filtering of Reference Data

8. Once you are able to connect and search, retrieve a dozen or so references to test how accurately they are filtered into EndNote references. Double-click a retrieved reference to open it to verify that the data are in the correct fields.

   Note that if you are paying for the references you retrieve, these may not come through correctly, so it is best to retrieve only a few. All references retrieved are saved to a connection log file, so they are not lost. This log file is replaced the next time you run EndNote.

9. If the reference data is not being correctly filtered into the appropriate fields in the EndNote references, you will need to compare the downloaded data to the filter templates in your connection file.

   Close the Retrieved References window and open the Connect .log log file in a word processor to view the original format of the retrieved references.

   From the Edit menu, choose *Connection Files* and select *Edit <Connection File>* to edit the newly created connection file. Look at the *Templates* panel of the connection file and compare the templates there to the reference data in the Connect .log file. Make changes as necessary. See Introduction to Filters for information about modifying filters.

Default Values for New Connection Files

When creating a new connection file, a few basic search attributes are entered by default. It is not guaranteed that these will work, as each database may only support its own subset of the Z39.50 attributes.

Consult the Z39.50 client configuration instructions from your information provider or your librarian to set up the connection file correctly for the online database you want to access.

Default settings for a new connection file are:

Port ID: 210

Element Set Name: F (Full)

Record Syntax: MARC21

Text: ANSEL

Search Fields (Use Attributes): Any Field (1016), Author (1003), Year (31), Title (4), Keywords (21), and Abstract (62).

Filter: MARC21 filter settings are used. All references import into the "Book" reference type. See Filter Information to import into additional reference types.

Using Z39.50 Command-Line Syntax

Note: This topic is intended only for people who are familiar with Z39.50 terminology and have access to the Z39.50-client configuration information for their online databases. The advanced search strategies are documented here only for more technical EndNote users; this knowledge is *not* required for basic searching of online databases.

These command-line searches do not work with PubMed or the Web of Science.

It is possible to set up a search of an online database that is not supported by the EndNote Search tab or the connection file you are using. For instance, if you know about the Z39.50 attributes supported by the online database, you can enter a Z39.50 search which EndNote passes directly to the server, without any translation. This lets you use searches that are not already supported by your connection file and is useful for testing various search attribute combinations when creating or modifying a connection file.

These advanced searches are entered directly into the search line just as you would enter a search term. EndNote ignores the search menu for that item when it detects that you ha ve entered an advanced search. If other search terms are needed, enter them into the subsequent search lines and select the appropriate "And", "Or", or "Not" connectors (just like any other search).

An advanced search uses the following format:

\\search term&/ATTRIBUTE TYPE/ATTRIBUTE VALUE

The first two characters (\\) tell EndNote this is an advanced search of an online database. The next part, up to the ampersand, is the search term. The numbers of the Z39.50 attribute type and values follow. They are entered first with a slash and the number for the attribute type, then a slash, and the attribute's value. Repeat that pattern for as many attributes as you want to specify. Not all attributes need to be included. See Search Attributes.

The following is a common search example that should work for most servers. This search, looking in Any Field and using the Contains operator, should find all references in which the title begins with "child."

\\ child&/1/4/3/1/5/100

A Use attribute (1) of 4 has been specified, so the search will be restricted to the Title for this database.

A Position attribute (3) of 1 further narrows the search by having the search term be found as the first word in the field.

A Truncation attribute (5) of 100 specifies no truncation at all so only "child" will be seen as a match, and words such as "children" and "childhood" will not.

Tip for Modifying Search Attributes

If you wanted to test how variations of the search attribute settings would impact your search, here's an easy way to do it— without having to edit your connection file.

1. With the connection already established, choose *Show Connection Status* from the *Window* menu. Keep the view set to *Status Messages*.
2. Start with a basic search using the Search tab (without the command-line syntax). For example, search for "child" in the Title field.
3. Look in the Status window, and you will see which attributes are being used. For example:

```
Searching for: [ child&/1/4/3/1/5/100].
====
Building SearchRequest Query:
====
Attribute:
Type: 1
Value: 4
Attribute:
Type: 3
Value: 1
Attribute:
Type: 5
Value: 100
Term:
child
====
```

The first line shows the command-line syntax (without the \\ prefix); each item is listed separately as well. Now, you can try out other attribute configurations to see how it would change the search.

4. You can copy the search command out of the Status window, and paste it onto the Search tab (remember to add the "\\" prefix to identify it as a command-line search), then add or modify the attribute values as necessary.
5. Click *Search* to try out your new combination of attributes.
6. When you have found a combination of search attributes that does what you need, edit your connection file and make those changes to the *Search Attributes* panel.

Preferences, Toolbars, & Shortcuts

EndNote Preferences

EndNote Preferences

The settings for configuring EndNote's display, formatting preferences, and other options are organized in the Preferences section of the EndNote program.

To access EndNote preferences:

1. From the Edit menu, choose Preferences.
2. A list of the available preference panels appears on the left side of the window. Click on the name of a panel in the list that corresponds to the setting you would like to change.

    Change Case
    Display Fields
    Display Fonts
    Duplicates
    EndNote Web
    Find Full Text
    Folder Locations
    Formatting
    Libraries
    Reference Types
    Sorting
    Spell Check
    Temporary Citations
    Term Lists
    URLs & Links

Saving or Discarding Your Changes

All of the preferences panels have the following options:

EndNote Defaults: Reverts the settings for just the current panel to the original EndNote settings.

Revert Panel: Removes any changes made to the current panel since it was last saved.

Save: Saves the changes made to the current panel.

OK: Saves all changes to the preferences and closes the Preferences window.

Cancel: Discards all changes to the preferences and closes the Preferences window.

Apply: Saves and applies all changes to the preferences, and keeps the Preferences window open so that you can continue to modify the preferences as necessary.

To close the Preferences window, choose *Close* from the *File* menu (+ W) or click the red close button in the upper left corner of the window. If you haven't saved your changes before closing the Preferences window, EndNote will alert you and give you the option to save the settings.

Where Preference Settings are Saved

Most general preferences are saved in the Windows registry. This includes many EndNote Preferences, subject bibliography settings, and Cite While You Write settings. Some preferences are stored in user-specific folders; this allows multiple users to access a single library while saving each user's preferred settings. The

preferences folders listed below store files such as the connect.log file created during an online search, the RefTypeTable.xml file that contains reference type definitions, and a Search folder that contains saved search strategies:

Windows XP: C:\Documents and Settings\[UserName]\Application Data\EndNote

Windows Vista and Windows 7: C:\ Users\[UserName]\ App Data\Roaming\EndNote

Library Preferences

To access these settings, go to the *Edit* menu, choose *Preferences*, and click on *Libraries* in the list of preferences.

Choosing a Library to Open

Use the Libraries preferences section to specify which libraries should open by default when you start EndNote. First, use the drop-down list to choose from these options:

Open the most recently used library

Open the specified libraries

Prompt to select a library

Do nothing

If you opt to “Open the specified libraries,” you must list those specified libraries here. To add a library to the list:

1. If the library is not already open, close the preferences dialog and open the library. Do this by choosing *Open* from the File menu and selecting the desired library.
2. Return to the Libraries section of the Preferences dialog, and click *Add Open Libraries* to add all open libraries to the list.

To remove a library from this list, select it in the Libraries panel and click *Remove Library*.

Of course, once EndNote is started, you can always open a library by choosing *Open* from the File menu.

Displaying the Library Name with Each Reference

Click the option to "Show Library Name in Reference Window" if you want the library name to appear at the top of each Reference window.

Display Fonts Preferences

The Display Fonts panel gives you the option of changing the fonts that EndNote uses to display much of the text throughout the program. To access these settings, go to the *Edit* menu, choose *Preferences*, and click on *Display Fonts* in the list of preferences.

You can control the following display font settings:

Library: The Library setting determines the font and size of the references listed in the Library window.

General: The General setting changes the font and size used to display most text that is typed into EndNote (such as in the Reference or Style windows). The General Display Font is also used for most of the previews and information panels in EndNote, as well as for bibliographies that are printed or copied directly from EndNote.

Labels: The Labels setting determines the font and size used for the Reference window field labels.

Search: The Search setting determines the font and size applied to user-entered text on the Search tab.

Changes made to the display fonts apply to all EndNote libraries opened on that computer. They do not affect the font used when you are formatting bibliographies in a word processing document. The normal font of the document is used for that.

EndNote uses Unicode to encode special characters, so that data can be easily translated between platforms, programs, and languages. However, some fonts do not include certain Unicode characters. If some characters do not display correctly in your EndNote library, we recommend switching the display font to a Unicode font or installing the appropriate language pack (see Displaying Extended/Special Characters).

To change the library display font:

1. From the *Edit* menu, choose *Preferences*.
2. Click the *Display Fonts* option in the list.
3. Click the tab to indicate which display font setting you want to change: *Library*, *General*, *Labels*, or *Search*.
4. Click the *Change Font* button, and select a different display font and/or size from the *Font* and *Size* lists.
5. Click *OK* to close the font selection dialog and return to the *Display Fonts* preferences panel.
6. Click *OK* to save the changes and close the Preferences dialog.

Reference Types Preferences

Use the *Reference Types* preferences panel to customize your settings for the fields (such as Author, Year, and Title) and reference types (such as Journal Article or Book) that are used by EndNote. Any changes that you make in this panel apply to all of the libraries that open on the computer.

To access these settings, go to the *Edit* menu, choose *Preferences*, and click on *Reference Types* in the list of preferences.

Default Reference Type

When you create a new reference in your EndNote library (by choosing *New* from the References menu), the new reference is set up for a journal article by default. If you would rather have new references automatically appear as books, patents, or some other reference type, change the "Default Reference Type" setting:

Click the *Default Reference Type* list and choose from one of the available reference types.

If you need a reference type that is not in the list, you will need to create a reference type for it and define it yourself (see Customizing Reference Types).

Defining Reference Types

If you need to modify any of EndNote's fields or reference types, click the *Modify Reference Types* button. This opens the EndNote Reference Types preference where you can add, delete, and rename EndNote's reference types and fields.

See Customizing Reference Types for more information about reference types and how to customize them.

Reference Type Table

You can use the *Export* and *Import* buttons to share a customized reference type table with another EndNote user. See Sharing Your Reference Type Table for step-by-step instructions.

Note: Replacing another user's RefTypeTable.xml file overwrites all changes to his/her current Reference Types table.

Temporary Citations

To access these settings, go to the

or *Insert Citation(s)* command from Word's *Tools* menu, or when you *Copy* and *Paste* a citation into a document. You can also type temporary citations into your document. The temporary citation is a placeholder that EndNote later changes to a "formatted" citation, such as "(Smith & Jones, 1999)."

By default a temporary citation includes the first author's last name, the year, and the EndNote record number, enclosed in curly braces:

{Smith, 1999 #24}

If necessary, you can change the temporary citation delimiters using the settings in this panel.

Temporary Citation Delimiters

Curly braces are used by default to indicate the start and end of each temporary citation. If you commonly use curly braces in your writing, you might want to select a different pair of markers for EndNote to use as Temporary Citation Delimiters.

Enter the desired markers into the appropriate boxes at the top of the Temporary Citations preferences panel.

Note: If you will be using EndNote Web to Cite While You Write, you must use the default curly braces as citation delimiters.

Record Number Marker

The number sign (#) always precedes the record number in an EndNote temporary citation. You may change this by entering another character in the Record Number Marker box.

The EndNote record number is a unique number assigned to each reference as it is added to a library. The number is specific to that reference in that particular library. If you are collaborating with other writers who have their own EndNote libraries (or do not have an EndNote library at all), you might find it easier to replace the Record Number in the temporary citation with something that uniquely identifies the reference but is not specific to your EndNote library. To do so, select the "Use field instead of record number" option and select from the Label field, the Accession Number field, or the Pages field.

The Label field can be used to manually enter any unique code that you would like to use for each record.

The Accession Number field is designed to contain the unique record number assigned to a reference from an online database.

The Pages field can contain a unique page number or another unique number for each record.

Note: If you have selected the Label, Accession Number, or Pages field, and that field is empty in a particular reference, the Record Number will appear in the temporary citation.

Citation Prefix Marker

The Citation Prefix Marker separates prefix text in a citation from the citation itself. For example, if you wanted a citation formatted as:

(see also Smith, 1999)

you would enter the text into the temporary citation as follows, with the "\" indicating the end of the prefix text and the start of the citation:

{see also \Smith, 1999 #24}

If you prefer to use a different character as the Citation Prefix Delimiter, you may enter it in this preferences panel. Semicolons (;), letters, numbers, and characters already used as other delimiters may not be used for the Citation Prefix Delimiter.

Note: When you use Cite While You Write's *Edit Citation* command to add prefix text, the Citation Prefix Marker is automatically inserted as part of the temporary citation.

Including Notes in the List of References

Some journal styles (such as Science) permit you to include notes with the list of works cited at the end of the document. In such a system, the notes are numbered just like the citations, and included in the reference list in the order of appearance, just like the references.

To identify text to be included as a numbered note in the reference list:

1. Type the text into the body of your document where you would want the number for the note to appear.
2. Be sure to surround the entire section of text with your Temporary Citation Delimiters (curly braces by default), and begin it with "NOTE:". For example:

   {NOTE: The authors would like to acknowledge
   the support of...}

When the paper is formatted by EndNote using a numbered style, the text is assigned a number and listed along with the references at the end of the paper.

Note: With Cite While You Write, you can simply go to Word's *Tools* menu, go to the *EndNote X* submenu, and choose *Insert Note*.

The way that these notes are identified may be changed in the Temporary Citations preferences. Enter a prefix that you would d like to use to signal that the text should be treated as a note.

Important Restrictions on the Use of the "NOTE" Feature

This feature requires that a numbered style be used for the formatting; otherwise, the note will be left as it was entered in the body of the text.

Enter text only. Do not attempt to insert graphics, equations, or symbols as note text.

Do not use the temporary citation delimiters as part of the text of the note. Other markers, such as the record number marker and the prefix marker and the multiple citation separator may be used.

These types of notes cannot be combined with regular temporary citations within the same set of brackets. They should be cited separately—each in its own set of brackets.

Sorting Preferences

When EndNote sorts author names and titles, you can identify what words or names to ignore for sorting purposes.

To access these settings, go to the *Edit* menu, choose *Preferences*, and click on *Sorting* in the list of preferences.

To add words to be ignored for sorting:

Enter the term in the text box below either the "Author Fields" or "Title Fields" prompt, and click *Add.*

To remove a term from either list:

Select the term and click *Remove*.

Click *EndNote Defaults* to revert both lists to the default settings.

Note: If the term you enter appears as the only word in an Author or Title field, it will not be ignored as a stop word in that case, and will be used for sorting.

Authors

The Author Fields list is designed so that you may enter parts of author names that may be omitted for sorting purposes. For example, prepositions in names such as "von," "van," and "de" are included as part of the last name, but not considered part of the name for sorting purposes. The entries in the Author Fields list are case sensitive; that is, if you enter "von" it applies only to "von" and not "Von."

For contractions, do not enter the apostrophe in the stop list. So, for the author name " D'Angelo," you could enter "D" to the stop list, without the apostrophe, to sort the name as "Angelo."

These settings apply to the Generic fields for Author, Secondary Author, Tertiary Author, and Subsidiary Author. No names are entered by default.

Titles

When terms are added to the Title Fields list, the sorting routine ignores them when they appear at the start of the title. Capitalization does not matter for these words. That is, the word "the" can be entered (lowercase) and still apply to "The."

For contractions, do not enter the apostrophe in the stop list. So, for the term " l'avenir" you would enter "L" to the stop list, without the apostrophe, to sort as " avenir."

These settings apply to the Generic fields for Title, Secondary Title (includes the Journal field), Tertiary Title, Short Title, and Alternate Title. The words "a," "an," and "the" are entered as defaults.

Note: When you close the Preference panel and return to your library list, you must resort your references to build a new sort that uses your revised list. You can do this by clicking on a column header, or by using the *References>Sort References* command.

Change Case Preferences

The EndNote styles can be configured to change the capitalization of the author names or titles. Use the Change Case preferences to list the words that should *not* be modified when EndNote changes the case of titles or authors. This can be used for special acronyms, equations, proper nouns, or compound names that require consistent capitalization.

For titles, this preference is used only when an output style is set up to apply "Headline style capitalization" or "Sentence style capitalization" (rather than "Leave titles as entered"). For author names, this preference is used when the output style applies a capitalization option other than "As Is."

To access these settings, go to the *Edit* menu, choose *Preferences*, and click on *Change Case* in the list of preferences.

To add words to the list:

Enter the term in the text box at the top of the dialog, and click *Add.*

To remove an item from the list:

Select the term and click *Remove*.

Formatting Preferences

To access these settings, go to the *Edit* menu, choose *Preferences*, and click on *Formatting* in the list of preferences.

The Formatting preferences panel contains the following options:

Suggest formatting with EndNote's Cite While You Write if the document type is supported

While the Format Paper feature for RTF files can be used on most word processor files, we recommend that you always use Cite While You Write for Microsoft Word documents. It is much easier and allows more control and options to give you the exact output you want.

When this item is selected, and you attempt to use Format Paper on a document that could be formatted with Cite While You Write, a message will appear recommending that you use Cite While You Write. You *can* still use Format Paper if you wish.

Omit Author and/or Year from Formatted Citation if Removed from Temporary Citation

EndNote's default behavior is to remove the author or year from the formatted citation if you remove either of those items from a temporary (unformatted) citation. For example, "{, 1999 #24}" would format as just "(1999)" when using a style that creates (Author, Year) citations. If you prefer to type just the record number into your papers as the temporary citation, you should turn this preference off so EndNote will not remove the author and year from all of your formatted citations.

Merge Duplicates in Bibliography

When this option is selected, EndNote automatically omits duplicate references from a bibliography. It is a good idea to use this option if you are citing references from multiple EndNote libraries in one paper. In this situation, the same journal article reference might appear in two libraries and would have two different record numbers. EndNote will not identify the records as duplicates unless you have this option set to merge duplicates.

When this option is selected, EndNote checks the bibliography for duplicate references during the formatting process. If duplicates are found, they are removed. References are considered duplicates if they are the same reference type (such as Journal Article or Book) and the following fields are identical: Author, Year, Title, Secondary Title (Journal, Newspaper, Magazine, Book Title, Series Title, Conference Name, etc.), Volume, Issue, and Pages.

Note: The *Duplicates* preference settings do not apply to this feature. The criteria for determining duplicates is fixed for the "Merge Duplicates in Bibliography" setting.

Display Fields Preferences

Use the *Display Fields* preferences to choose which fields to display in EndNote's Library window. These settings apply to all libraries opened on the computer.

To access these settings, go to the *Edit* menu, choose *Preferences*, and click on *Display Fields* in the list of preferences.

Choose the desired field from each *Field* list. You may select up to eight fields to be displayed in the Library window. To show fewer than eight fields, select *[Do not display]* instead of a field name.

In most cases, the column heading in the Library window is the same as the Generic name of the field (exceptions include the *Figure* field, which is indicated by a *fig.* header, and the *File Attachments* field, which is headed by a paper clip icon). If you would like to change the name for the Library window display, enter a new name in the Heading column next to the chosen field.

Initially, the first column displays a paper clip icon for references that include an attached file in the File Attachments field. Then, the first author's last name, the year, the title, the journal name or secondary title, the reference type, the URL, and the Last Updated date are displayed for each reference.

If you would like to display all author names under the Author heading in the library reference list, rather than just the first author, select the check box next to *Display all authors in the Author field*.

Duplicates Preferences

The *Duplicates* preferences panel sets criteria for the *Find Duplicates* command on the References menu (that command is described in Finding Duplicate References). These settings are also used to highlight or discard duplicate references when retrieving references from an online database.

To access these settings, go to the *Edit* menu, choose *Preferences*, and click on *Duplicates* in the list of preferences.

Compare References

By default, EndNote identifies duplicate references in a library as references of the same reference type with matching Author, Year, and Title fields. Use this panel to customize the way EndNote identifies duplicate references.

To select the fields that EndNote should compare when finding duplicate references, click in the check boxes to the left of the field names.

The "Generic" names of the fields are used here. For details about what the Generic field names correspond to for each reference type, see List of Reference Types. You may select as many fields as you want to make the duplicate detection more or less stringent.

Criteria

You may also set the "Criteria" to have EndNote compare the fields and look for an exact match or be more lenient in the comparison and ignore spacing and punctuation.

Online Search Results

Select the check box to automatically discard duplicate references when retrieving references from an online database. The duplicates are never inserted into the library.

Note: These settings do not apply to the "Merge Duplicates in Bibliography" setting (see Formatting Preferences). That specific comparison of reference data is used only to remove identical references from bibliographies.

Folder Locations Preferences

The Folder Locations preferences panel is where you set the personal folder locations for new or modified styles, import filters, and connection files. To access these settings, go to the *Edit* menu, choose *Preferences*, and click on *Folder Locations* in the list of preferences.

The many styles, filters, and connection files provided with EndNote are installed in the Styles, Filters, and Connections folders which are located in the EndNote program folder :

C:\Program Files\EndNote X4 \Styles
C:\Program Files\EndNote X4 \Filters
C:\Program Files\EndNote X4 \Connections

When you display a list of styles, filters, or connection files in EndNote, the list is compiled from two locations: the installation folders listed above, and your personal folders.

Note: To change the default installation folder for the provided styles, filters, an connection files, see Changing the Default Content File Location .

Initially, your personal folders do not exist; they are created once you create a new file or save changes to an existing file. For example, when you open an existing style and make changes, you cannot *Save*, but must choose *Save As*. You can give the file the same name or a modified name, but the file is saved to your personal Styles folder. The next time you view a list of output styles, you will see your modified style. If you gave the file a different name than the original file, both are listed. If you gave the file the same name as the original, you will see the modified style listed, and not the original file, although it still resides in the program folder.

Why do we bother with personal folders? Why not simply change or add to the installation folders? We implemented personal folders so that:

If you reinstall EndNote for some reason, you will not overwrite a modified file with the same name. (We know you may have spent hours getting your file just right, and do not want to risk losing your work.)

When you upgrade to a newer version of EndNote, you will not delete a new or modified file.

When you download EndNote program updates, you will not overwrite a modified file.

You can write protect a shared program folder, yet still use your own customized styles, filters, and connection files.

You must have administrative rights to modify files in the Program Files folder. For many users, this is not an option, or not easily done. For users running Windows Vista, making changes to files in the Program Files folder is restricted.

By default, your personal folders are set to:

Windows XP:
C:\Documents and Settings\[UserName]\My Documents\EndNote\Styles
C:\Documents and Settings\[UserName]\My Documents\EndNote\Filters
C:\Documents and Settings\[UserName]\My Documents\EndNote\Connections

Windows Vista:
C:\ Users\[UserName]\ Documents\EndNote\Styles
C:\ Users\[UserName]\ Documents\EndNote\Filters
C:\ Users\[UserName]\ Documents\EndNote\Connections

To change your personal folder locations:

1. From the *Edit* menu, choose *Preferences*.
2. Click on *Folder Locations*.
3. To change a folder location, click the *Select Folder* button, open the folder that you would like to designate as the new Style, Filter, or Connection folder, and click *Select Folder* .

Term Lists Preferences

To access these settings, go to the *Edit* menu, choose *Preferences*, and click on *Term Lists* in the list of preferences.

By default, every new EndNote library has three term lists associated with it: Authors, Journals, and Keywords. The term lists are automatically updated as you enter references into your library. The terms in these lists are also used to facilitate data entry using the "Suggest Terms as You Type" feature. This feature suggests terms as you type into fields with term lists linked to them. For example, as you type into the Author field, EndNote suggests author names from your Authors term list to help you with data entry. When you enter a new term that is not currently in the associated term list, it appears in red text to indicate that it is a new term. This can point out typing mistakes or the use of an incorrect keyword if you thought you were entering a name or a term commonly used in your library.

Any of the term list settings described above can be turned off using the settings for the *Term Lists* preferences.

Suggest Terms as You Type (Auto-Completion)

When selected, EndNote will automatically complete matching terms when you are typing into a field that is linked to a term list (see Inserting Terms into References).

If you turn this feature off, you may still insert terms into a field by opening the desired term list from the Tools menu and double-clicking the desired term.

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 from the File menu), drag-and-drop references, or *Paste* references in to your library. If you turn this option off, you can always manually update your term lists by selecting *Define Term Lists* from the *Tools* menu, highlighting a term list, and clicking *Update List* (see Manually Updating Term Lists).

Update lists during data entry

When this option is selected, the term lists are automatically updated as you type in new reference data. If you turn this option off, you can always manually update your term lists by selecting *Define Term Lists* from the *Tools* menu, highlighting a term list, and clicking *Update List* (see Manually Updating Term Lists).

Spell Check Preferences

To access these settings, go to the *Edit* menu, choose *Preferences*, and click on *Spell Check* in the list of preferences.

On the Spell Check preferences panel, you can set general spell check *Options* and select or modify *Dictionaries*. For general information about how to start spell checking a record, see Starting Spell Check.

General Options

You can access these Spell Check Options from the EndNote Preferences Spell Check panel or from the dialog that appears when you run Spell Check. Click the *Options* button.

1. Select the check box next to each item you want to apply during spell checking.
2. Select a Main Dictionary language from the list of available dictionaries.

   For each language, EndNote uses a combination of dictionary files located in EndNote's Spell folder. Select your primary language. If you want to apply additional language dictionaries, see Adding an Existing Dictionary.
3. Decide how fast and accurate you want spell checking to work.
4. Click *OK* to save the changes.

Note: For a complete description of each item on the Options dialog, see Spell Check Options.

Modifying Dictionaries

You can access the Dictionaries preferences from the EndNote Preferences Spell Check panel or from the dialog that appears when you run Spell Check. Click the *Dictionaries* button.

Use this dialog to view or edit the content of existing dictionaries, to add existing dictionaries for use, to create new dictionaries, and to remove dictionaries. The dictionaries listed under Files are currently in use (in addition to the Main Dictionary selected under Options).

Note: For a complete description of each option on the Dictionaries dialog, see Spell Check Dictionaries.

To modify dictionaries:

1. Under *Files*, select the dictionary file you want to view or modify.

   If it is already in the list, simply select it.

   If you need to locate an existing file to use, use the *Add File* button to locate the file on your computer and add it to the list. By default, dictionaries are kept in EndNote's Spell folder.

   To create a new dictionary, click *New File*.

   To remove a dictionary, display the file name in the list and click *Remove File*. This removes a dictionary from use, but does no t delete the actual disk file.

2. The words in the selected dictionary appear in the top list.

   To add a word to the selected dictionary, type it under Words and click *Add Word*.

   To delete a word from the selected dictionary, select the word and click *Delete Word*.

   To change the Action applied to a word, select the word and then pick the new Action from the list.

Adding an Existing Dictionary

You may have selected English (or a different language) as your Main Dictionary Language, but want to apply an additional language during spell checking.

1. On the Dictionaries dialog, click the *Add File* button.

2. In EndNote's Spell folder, locate the dictionary file you want to use and Open it. The dictionary is added to the list under Files.

Importing/Exporting a Dictionary

The Dictionaries dialog includes *Import* and *Export* buttons.

Use *Import* to locate and import a plain text file of terms into the current dictionary. The text file should contain a list of terms, with each term on its own line. If you are typing the list into a text file, make sure each term is followed by a carriage return, including the last term in the list. If you are creating the list in a word processor, make sure to use *Save As* to save the file as plain text. If your terms contain extended characters, save with the Unicode (UTF-8) encoding option.

Use *Export* to save all terms from a dictionary to a plain text file, where each term starts on a new line.

Dictionaries Supplied with EndNote

These dictionaries are supplied with EndNote. When you select the main dictionary language, a combination of files are loaded, including files not listed here.

When you want to add additional languages, find the Dictionary you want to use from the left column, then look for the corresponding File Name. When you *Add* a dictionary, look for the appropriate File Name in EndNote's Spell folder.

Dictionary	File Name
User Dictionary: Contains English words	accent.tlx
User Dictionary: Contains common English misspellings and their correct replacements for auto correction	correct.tlx
User Dictionary: Sample user dictionary	userdic.tlx
American English	ssceam.tlx
American English Medical	sscema.tlx
British English	sscebr.tlx
British English Medical	sscemb.tlx
Danish	ssceda.tlx
Dutch	sscedu.tlx
Finnish	sscefi.tlx
French (European and Canadian)	sscefr.tlx
German	sscege.tlx
Italian	ssceit.tlx
Norwegian (Bokmal)	sscenb.tlx
Portuguese (Brazilian)	sscepb.tlx
Portuguese (Iberian)	sscepo.tlx
Spanish	sscesp.tlx
Swedish	sscesw.tlx

URLs & Links Preferences

To access these settings, go to the *Edit* menu, choose *Preferences*, and click on *URLs & Links* in the list of preferences.

Connection Log File

When you use the *Online Search* command to connect to an online database, EndNote keeps a copy of all of the retrieved references for that session in the connection log file (the file name is "Connect .log"). This happens by default, but you may turn this option off by clearing the "Use Log File" option.

We recommend keeping the option turned on because in the event that the references were not correctly retrieved or filtered into EndNote, you can always adjust the filter in the connection file, and import the Connect .log file instead of redoing the search and download (see General Importing Instructions).

By default, the Connect .log file is stored in the folder:

Windows XP: C:\Documents and Settings\[UserName]\Application Data\EndNote

Windows Vista: C:\ Users\[UserName]\ App Data\Roaming\EndNote

You may change the name and the location of the Connect .log file by clicking the *Choose* button. In the dialog that appears, enter a new name for the file (if desired), and select the new location for the file.

ISI Base URL

When you export references from the Web of Science to EndNote, EndNote creates a "Go to ISI" link in the URL field of each reference. These links take you back to the ISI source record where you can find related references, times cited, and other information. If you have upgraded from an earlier version of EndNote, you may need to click *EndNote Defaults* to update the ISI Base URL to the latest setting.

If your institution uses a locally mounted version of Web of Science, you should enter the URL for that server here in EndNote's ISI Base URL preference. Otherwise, the links in references downloaded from Web of Science will take you to the main Web of Science server where you might not have access.

OpenURL Arguments

The *URL>OpenURL Link* command on the References menu starts your default web browser and displays the full text article (if available) plus a list of links to similar articles. It connects to an OpenURL standard syntax server and uses these OpenURL preferences along with data in your EndNote record to find related online references.

Note: This command has no relation to the URL field found in EndNote references or the *URL>Open Link* command on the References menu (which opens the specific URL found in the URL field).

We include a default argument to search for related online records. You can use this argument as a syntax example if you wish to enter your own arguments here.

Note: Remember, you can revert back to the EndNote defaults at any time by clicking *EndNote Defaults*.

Attached Files

When you choose *File Attachments>Attach File* from the *References* menu to insert a link to a file, you have two options available to you. You can:

Insert the file as a relative link.

In this case, EndNote makes a copy of the original file and places it in the DATA\PDF folder that is part of your EndNote database. EndNote will always be able to access the file, even when you share your database with a colleague. However, if you edit the original file on your computer, those changes will not be reflected in EndNote. You would need to clear the file from your EndNote reference and reinsert the file.

Insert the file with an absolute path.

In this case, EndNote will always look in the original folder for the inserted file. This can be helpful if you plan to edit the original file, and you want those changes reflected when you access the file from within EndNote. However, if you ever move the file from the original folder, EndNote will not be able to access it unless you clear the file from your EndNote reference and reinsert it from the new folder location. If you send your database to a colleague, the file will not be available.

By default, the check box titled "Copy new file attachments to the default file attachment folder and create a relative link" is selected, so that EndNote will copy linked files to the DATA\PDF folder. You can deselect this box in order to save absolute paths. You can always override this default setting on the file dialog when you are inserting a file.

Find Full Text always saves files to the default attachment folder and creates relative links.

EndNote Web Preferences

The EndNote Web preference panel saves subscription details for connecting to EndNote Web. To access these settings, go to the *Edit* menu, choose *Preferences*, and click on *EndNote Web* in the list of preferences.

To activate a new EndNote Web account, or to link to an existing EndNote Web account, use the *Register Online* button to launch your browser and go to the appropriate Web page.

You do not need to save your Email Address and Password; you can opt to enter this information each time you connect to EndNote Web. See Transferring References.

Enter your EndNote Web subscription details:

The address of your EndNote Web site, such as: http:// www.myendnoteweb.com

Your email address, which is your user identification

Your EndNote Web password

Once you save this information with *Apply* or *OK* , you will not have to enter it again; it is saved until you change EndNote Web preferences again.

Find Full Text Preferences

To access these settings, go to the *Edit* menu, choose *Preferences*, and click on *Find Full Text* in the list of preferences.

This panel allows you control over which sites, services, and technology EndNote uses when attempting to find the full text for a reference. You can limit the options in order to speed up the Find Full Text operation.

The check boxes determine which pieces of information will be used from your EndNote references. These represent unique identifiers for locating exact reference matches.

If your institution allows access to an OpenURL server, you can configure this panel to allow EndNote access to the site. Select the OpenURL check box, and enter the OpenURL path to direct to the online site. If the site requires authentication to verify that you are allowed access, you can enter an Authentication URL. The Authentication URL simply directs to the site's login page. When you attempt to Find Full Text, you will be directed to that page to enter authentication information (typically a user ID and password).

To learn more about using the Find Full Text feature and about adding access to your institution's library, see Finding Full Text for a Reference.

Microsoft Word CWYW Preferences

Cite While You Write Preferences (Microsoft Word)

You can access the Cite While You Write preferences in one of three ways:

Word 2003 : From the *Tools>EndNote* menu in Microsoft Word, select *Cite While You Write Preferences*.

Word 2007 and 2010 : On the EndNote tab in Word, in the *Tools* group, click *Preferences.*

On the EndNote toolbar in Word, click the EndNote Prefs icon.

From the *Tools>Cite While You Write* menu in EndNote, select *CWYW Preferences*.

Note: Your word processor must be open in order to access *CWYW Preferences* from the Tools menu in EndNote.

Cite While You Write Preferences include:

General Preferences
Keyboard Shortcuts in Word
Figures and Tables in Word
Application

Several related EndNote preferences also directly affect Cite While You Write.

General Preferences (Microsoft Word)

General preferences are useful when you always use your EndNote library along with your word processor, and you always use your word processor along with your EndNote library.

To access General preferences, go to Word's *Tools > EndNote* menu and select *Cite While You Write Preferences*. (Word 2007 and 2010: On the EndNote tab, in the *Tools* group, click *Preferences* .)

Open EndNote When Starting Word

Select this item to always open EndNote when you start Microsoft Word.

Close EndNote When Leaving Word

Select this item to always close EndNote when you leave Microsoft Word. This works only when the EndNote program was launched with one of the Cite While You Write commands from within Word or if the *Open EndNote When Starting Word* preference is selected.

Return to Document After Inserting Citations

Select this item to always make your document the active window after inserting citations with EndNote's *Insert Selected Citation(s)* command. If this preference is turned off so that the Word document remains in the background, you will not see the inserted citation in the Word document until the document becomes the active window. This is because the display for the Word document is not updated in the background.

Enable Instant Formatting on new Word documents

This option is available for Cite While You Write. It turns Instant Formatting on or off for new Word documents. When you enable Instant Formatting, you can also determine how often EndNote scans for temporary citations and whether it checks for citation changes in existing citations.

To turn instant formatting on or off in an *existing* Word document, see Instant Formatting.

Turn off Word's "Show field codes instead of their values" option when opening or updating documents that include citations

EndNote uses extensive Word field codes in order to identify and format citations. When field codes are displayed, your document can look confusing! See Field Codes in Word for more information and an example.

We recommend that you not view field codes in Word. This option ensures that you will see appropriate text in your document.

Keyboard Shortcuts in Word

Keyboard shortcuts for EndNote's Cite While You Write commands are available in Word.

To add or change a keyboard shortcut:

1. **Word 2003** : From Word's *Tools>EndNote* menu, select *Cite While You Write Preferences.*

   Word 2007 and 2010 : On the EndNote tab, in the *Tools* group, click *Preferences* .
2. Click the Keyboard tab.
3. From the list of commands, select the command for which you would like to add (or change) a shortcut.
4. Under "Press new shortcut key," enter the new shortcut key combination on the keyboard.
5. Click *Assign* to assign the new shortcut.

Follow the same steps to remove an assigned shortcut key, except click *Remove* instead of *Assign*.

Click *Reset All* to remove custom key assignments.

Figures and Tables in Word

Use settings in the output style to determine whether images are placed in-text or at the end of the document, where captions and labels are located, and separation and punctuation around images and captions. See Figures and Tables.

The figures and tables settings in Microsoft Word override settings from the current output style. If your output style is set to print figures and tables in a list at the end of the document, the settings on this tab are ignored. However, if your output style is set to print figures and tables in-text, you can use this tab to override settings when you have moved figures around in your document and want to retain their placement.

To customize the in-text placement of EndNote figures and tables in Word.

1. **Word 2003** : From Word's *Tools* menu, select *Cite While You Write Preferences*.

   Word 2007 : On the EndNote tab, in the *Tools* group, click *Preferences* .
2. Select the Figures and Tables tab.
3. Select the appropriate radio button to:

   Place each figure or table directly after the paragraph where it is first referenced, or

   When re-generating figures, keep each figure or table in its current position. This allows you to move images around in your document and have them stay there when you Generate Figure List again.

Application for CWYW

Use the Application tab to indicate which product to use when you Cite While You Write: EndNote (desktop) , EndNote Web , or Reference Manager .

To select the appropriate application:

1. **Word 2003** : From Word's *Tools>EndNote* menu, select *Cite While You Write Preferences*.

   Word 2007and 2010 : On the EndNote tab, in the *Tools* group, click *Preferences.*
2. Click the Application tab.
3. Select the appropriate application:

   EndNote is your desktop version of EndNote.

   EndNote Web is the online Web version of EndNote.
   If you select EndNote Web, you must also enter your subscription details, which include the

appropriate URL, your email address, and your password. You may opt to remember the email and password for future sessions.

Reference Manager is another bibliographic reference management program available from Thomson Reuters.

For more information about EndNote Web, see Overview of EndNote Web.

Showing Word Processor Codes

The formatted citations and bibliography in your document are not plain text; they contain hidden data that make it possible for EndNote to unformat and reformat citations and bibliographies.

Microsoft Word's Field Shading

Formatted citations and bibliographies in Word documents are Microsoft Word fields. This gives EndNote the ability to uniquely identify them.

When you click on a field in Word (such as a formatted EndNote citation or the bibliography), it becomes shaded. You can change this behavior so that the fields are always shaded, shaded only when selected, or never shaded. To do so, choose *Options* from Word's Tools menu and select the *View* option. There you will see the options for field shading. **Word 2007** : Click the Office icon in the top left corner of Word, click *Word Options* , then click *Advanced* , and scroll down to "Show document content" to find field shading options.

Related EndNote Preferences

Several other EndNote preferences directly affect Cite While You Write. To access EndNote preferences, go to the *Edit* menu in EndNote and select *Preferences*.

The related preference dialogs include settings for:

Temporary Citations

Formatting

These settings are stored with the EndNote program's preferences because they apply to formatting papers with Cite While You Write for Microsoft Word , Cite While You Write for OpenOffice.org Writer, and Format Paper for RTF files.

OpenOffice.org Writer CWYW Preferences

General Preferences (OpenOffice.org Writer)

General preferences are useful when you always use your EndNote library along with your word processor, and you always use your word processor along with your EndNote library.

To access General preferences in OpenOffice.org Writer, go to the *EndNote* menu and select *Cite While You Write Preferences*.

Open EndNote When Starting OpenOffice.org Writer

Select this item to always open EndNote when you start OpenOffice.org Writer.

Close EndNote When Leaving OpenOffice.org Writer

Select this item to always close EndNote when you leave OpenOffice.org Writer. This works only when the EndNote program was launched with one of the Cite While You Write commands from within OpenOffice.org Writer or if the *Open EndNote When Starting Writer* preference is selected.

Shortcuts

Shortcuts to Make Using EndNote Easier

Keyboard commands, shortcut menus , and toolbars can streamline your database building and citation processes.

To add or change Cite While You Write keyboard shortcuts in Microsoft Word, see Keyboard Shortcuts in Word.

Shortcut Menus

As a convenience, EndNote provides contextual, or shortcut, menus for some of the most commonly used features. Shortcut menus appear when you right-click on something in the EndNote program (such as a reference, a group name, or an Author field).

The contents of the menu depend on where you click and what options are available for that particular item. Only a subset of possible commands are displayed; these are intended to represent the most commonly used functions for the selected target. Choosing a command from a shortcut menu has exactly the same result as choosing the command from the main menu or the toolbar.

A shortcut menu appears wherever you click. It remains open until you choose a command from the list, click elsewhere, or press Esc.

Shortcut menus are available in at least the following areas: the Reference window, the reference list in the Library window, the Groups pane in the Library window, term lists, and Managers (styles, filters, and connections).

Toolbars (Windows)

Toolbars are available in EndNote to give you quick access to some of the commonly used commands. There are several toolbars (Library, Reference, and CWYW); each is described below.

Library (and CWYW) Toolbar

By default, the commands on the Library toolbar include (from left to right):

Integrated Library & Online Search Mode, **Local Mode**, and **Online Search Mode**: Choose one of these display modes. *Integrated Mode* allows local library operations as well as online searches, *Local Library Mode* suppresses commands and groups for online searching, and *Online Mode* displays only groups and commands for online searching.

Output Styles menu: The Bibliographic Output Style menu lists all the styles you have marked as “favorites” in the Style Manager, and displays the one that is currently selected to be used for the Library window preview, *Copy Formatted*, printing, exporting, or any formatting. If you do not see the style that you want in this menu, you can choose *Select Another Style* from the bottom of the menu to pick a new style. See The Style Manager.

Copy to Local Library: This command is available only in Online Search Mode. It copies highlighted references to the active local library. References will appear in a temporary Copied References group.

New Reference: This opens a new reference for data entry. It is as though you had used the *References* menu to select *New Reference*.

Online Search: This allows you to select a connection file for an online search. It is as though you had used the Tools menu to select *Online Search*.

Import: This is the same as though you had used the File menu to select *Import*.

Export: This is the same as though you had used the File menu to select *Export*.

Find Full Text: This commands searches online for the full-text article for the selected references.

Open Link: For references that contain a URL, this command attempts to launch your default browser and display the URL location.

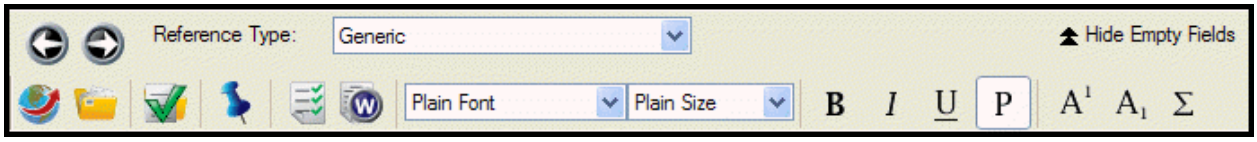
Open File: This is available only when the selected reference has an attached file. The system will attempt to launch the associated program to open the file. It is as though you had double-clicked on the file in the Windows folder.

Insert Citation, **Format Bibliography**, and **Return to Word Processor**: These commands are available only when Microsoft Word or OpenOffice.org Writer is running and Cite While You Write support is installed. If you have both Microsoft Word and OpenOffice.org Writer open, these commands are active for the word processer that was launched first. A complete CWYW toolbar is available within the word processor. See Cite While You Write Commands in Word, or Cite While You Write Commands in OpenOffice.org Writer.

Help: This brings up the EndNote Help system. It is as though you had used the *Help* menu to select *EndNote X4 Help*.

Quick Search text box: Type a single word or phrase into the Quick Search text box and press Enter to quickly search the library.

Reference Toolbar



The top line of the Reference toolbar includes arrows that display the previous or next reference in the current reference list (in the current sort order). It also includes the Reference Type menu, where you assign a reference type to the current reference, and a *Hide Empty Fields* button that toggles between showing and hiding the empty fields in a reference.

The bottom line of the toolbar includes *Open Link*, *Open File*, *Spell Check*, *Attach Figure*, *Format Bibliography*, *Return to Word Processor*, and then a Text toolbar as described below.

Text Toolbar

The text toolbar displays EndNote's text font and text size menus to change the font and size of the text in a reference or output style. The buttons on the toolbar are (from left to right): *Bold, Italic, Underline, Plain Text, Superscript, Subscript*, and *Symbol* font. If a button is "pressed" that indicates that the text style represented by that button has been applied to the text that is selected (or where the cursor blinking).

Stopwords

Stopwords are common, frequently used words such as articles (a, an, the), prepositions (of, in, for, through), and pronouns (it, their, his) that cannot be searched as individual words. If you include a stopword in a phrase, the stopword is interpreted as a word placeholder.

a
able
about
above
according
accordingly
across
actually

after
afterwards
again
against
ain't
all
allow
allows
almost
alone
along
already
also
although
always
am
among
amongst
an
and
another
any
anybody
anyhow
anyone
anything
anyway
anyways
anywhere
apart
appear
appreciate
appropriate
are
aren't
around
as
aside
ask
asking
associated
at
available
away
awfully
be
became
because
become
becomes
becoming
been
before
beforehand
behind
being
believe
below
beside
besides
best
better

between
beyond
both
brief
but
by
c'mon
c's
came
can
can't
cannot
cant
cause
causes
certain
certainly
changes
clearly
co
com
come
comes
concerning
consequently
consider
considering
contain
containing
contains
corresponding
could
couldn't
course
currently
definitely
described
despite
did
didn't
different
do
does
doesn't
doing
don't
done
down
downwards
during
each
edu
eg
eight
either
else
elsewhere
enough
entirely
especially
et
etc

even
ever
every
everybody
everyone
everything
everywhere
ex
exactly
example
except
far
few
fifth
first
five
followed
following
follows
for
former
formerly
forth
four
from
further
furthermore
get
gets
getting
given
gives
go
goes
going
gone
got
gotten
greetings
had
hadn't
happens
hardly
has
hasn't
have
haven't
having
he
he's
hello
help
hence
her
here
here's
hereafter
hereby
herein
hereupon
hers
herself

hi
him
himself
his
hither
hopefully
how
howbeit
however
i'd
i'll
i'm
i've
ie
if
ignored
immediate
in
inasmuch
inc
indeed
indicate
indicated
indicates
inner
insofar
instead
into
inward
is
isn't
it
it'd
it'll
it's
its
itself
just
keep
keeps
kept
know
knows
known
last
lately
later
latter
latterly
least
less
lest
let
let's
like
liked
likely
little
look
looking
looks
ltd

mainly
many
may
maybe
me
mean
meanwhile
merely
might
more
moreover
most
mostly
much
must
my
myself
name
namely
nd
near
nearly
necessary
need
needs
neither
never
nevertheless
new
next
nine
no
nobody
non
none
noone
nor
normally
not
nothing
novel
now
nowhere
obviously
of
off
often
oh
ok
okay
old
on
once
one
ones
only
onto
or
other
others
otherwise
ought

our
ours
ourselves
out
outside
over
overall
own
particular
particularly
per
perhaps
placed
please
plus
possible
presumably
probably
provides
que
quite
qv
rather
rd
re
really
reasonably
regarding
regardless
regards
relatively
respectively
right
said
same
saw
say
saying
says
second
secondly
see
seeing
seem
seemed
seeming
seems
seen
self
selves
sensible
sent
serious
seriously
seven
several
shall
she
should
shouldn't
since
six

so
some
somebody
somehow
someone
something
sometime
sometimes
somewhat
somewhere
soon
sorry
specified
specify
specifying
still
sub
such
sup
sure
t's
take
taken
tell
tends
th
than
thank
thanks
thanx
that
that's
thats
the
their
theirs
them
themselves
then
thence
there
there's
thereafter
thereby
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these
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they'd
they'll
they're
they've
think
third
this
thorough
thoroughly
those
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three

through
throughout
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very
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vs
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we're
we've
welcome
well
went
were
weren't
what
what's
whatever
when
whence
whenever
where
where's

whereafter
whereas
whereby
wherein
whereupon
wherever
whether
which
while
whither
who
who's
whoever
whole
whom
whose
why
will
willing
wish
with
within
without
won't
wonder
would
would
wouldn't
yes
yet
you
you'd
you'll
you're
you've
your
yours
yourself
yourselves
zero

Transferring Between Desktop and Web

Overview of EndNote Web

EndNote Web provides a full range of bibliographic management on the Web. You can import and edit references via a personal Web account, and then cite the references in papers and create bibliographies. EndNote Web can search Web of Knowledge, PubMed, and hundreds of online library catalogs to help build a personal reference collection. EndNote Web includes unique integration for Web of Knowledge subscribers with dynamic links to "Times Cited" and related records, giving you one-click access to the latest information on a reference article.

Each EndNote Web library can store thousands of records and create bibliographies in over 4,500 publishing styles. Cite While You Write is also available for anyone using Microsoft Word to create bibliographies instantly.

An EndNote Web subscription serves as an essential resource for everyone on campus—from students to teaching faculty. It can provide you with an online storage option when you are away from your desktop library; references can be transferred between EndNote Web and EndNote easily and without the need to export and import files. See Transferring References.

For more information about EndNote Web, or to subscribe, go to http:// www.endnoteweb.com or contact the Thomson Reuters sales team.

The desktop version of EndNote includes an option to transfer references between EndNote desktop and EndNote Web. You can also use EndNote Web to Cite While You Write in Microsoft Word.

Note: This Help file explains only how to use EndNote Web in conjunction with the desktop version of EndNote. For information about using EndNote Web, see the Help file available in EndNote Web.

Setting Up an EndNote Web Account

You may set up an EndNote Web account for each valid EndNote desktop installation—one account for each unique EndNote serial number. Your new EndNote Web subscription is valid for two years from when you register. For institutions with a site license, the site serial number will allow the appropriate number of EndNote Web accounts.

EndNote Web is accessed through a browser, so you must have one of the following browsers installed on your computer:

Microsoft® Internet Explorer® 6 or later
Firefox 2.0 or later
Safari™ 1.3 or later

Cookies and Javascript must be enabled in your browser settings.

Set up a new EndNote Web account in one of these ways:

The first time you start EndNote after installing or upgrading, you are given the option of setting up a new EndNote Web account.

In EndNote, go to the EndNote Web section in the Groups pane and select Configure. Click *Register Online*.

In EndNote, go to the *Edit* menu and choose *Preferences*. In the left column, click on EndNote Web. Then, click *Register Online*.

Follow the instructions to create a new EndNote Web account. If you need more information about EndNote Web, or subscription assistance, go to http://www.endnoteweb.com/enwebinfo.asp or contact the Thomson Reuters sales teams at rs.sales@thomson.com.

Before You Begin

You can easily transfer references in either direction: from an EndNote Web library to an EndNote desktop library, or from an EndNote desktop library to an EndNote Web library.

When you transfer references, the original references are left intact. The process does not move references, but copies them to the new location.

Important Points about Transferring References

Please note these limitations before attempting to transfer references between EndNote and EndNote Web:

You must have a valid subscription to use EndNote Web.

You must have an active Internet connection in order to transfer references between the desktop version of EndNote and EndNote Web.

If you plan to transfer references into an EndNote desktop library, the library must allow read-write access. Make sure the file itself allows read-write access, and make sure it is not on a read-only CD or a locked partition.

Due to server resources, there may be a limit to the number of references you can transfer at one time. If you attempt to transfer more than the limit, you will be notified.

Figures and linked files will not transfer to an EndNote Web library, although existing link paths will appear for the *Figure* and *File Attachments* fields. You cannot edit these fields in EndNote Web.

Duplicate References

When you transfer references from an EndNote Web library to a desktop library, you can turn on duplicate detection. EndNote will use the duplicate detection criteria specified under EndNote Preferences.

When you transfer references from an EndNote desktop library to an EndNote Web library, duplicates found in the EndNote Web library will always be overwritten with the new references transferred from the EndNote desktop library.

You should plan to edit references in only one place—either the Web library or the desktop library. Duplicate references, found in both the EndNote web library and the desktop library, cannot be synchronized. When you copy references from one library to another, the reference in the target library is overwritten.

Transferring References

You can copy references in either direction: from an EndNote Web library to an EndNote desktop library, or from an EndNote desktop library to an EndNote Web library. See Before You Begin for important points.

Remembering Connection Details

You can enter your EndNote Web subscription details once, and have EndNote remember your settings. This is optional; if you prefer the security of entering this information each time you connect, scroll down to "Transferring References between EndNote Web and Desktop."

To remember EndNote Web connection details:

1. Open your EndNote desktop library.
2. Display EndNote Web preferences:

   In the Groups pane, under EndNote Web, click Configure, or

   From the *Edit* menu, select *Preferences* and then *EndNote Web*.

3. Enter your EndNote Web subscription details:

   The address of your EndNote Web site, such as: http:// www.myendnoteweb.com

   Your email address, which is your user identification

   Your EndNote Web password

4. Click *OK* to save your connection preferences.

You will not have to enter this information again; it is saved until you change EndNote Web preferences again.

Transferring References between EndNote Web and Desktop

To transfer references between EndNote Web and EndNote desktop:

1. Initiate the connection to EndNote Web. Do one of these:

   From the Tools menu, select *EndNote Web*.
   (If you have already saved EndNote Web preferences, you will be connected to EndNote Web. If not, you will be prompted to enter connection details for one-time use, so that they are not remembered later.)

   In the Groups pane, under EndNote Web, click Transfer.
   (This option is available only if you have already saved EndNote Web preferences.)

2. Once the connection is made, you will be able to set transfer options and begin transferring references.

   a. Under “Web,” select the appropriate EndNote Web folder.

   b. Determine whether you are transferring references to or from your EndNote desktop library. Select one of these options:

      Transfer References from Web to Desktop
      You can allow duplicates or discard duplicates during the transfer. EndNote will use the duplicate settings indicated in your EndNote preferences.

      Transfer References from Desktop to Web
      You can transfer the currently showing references, all references found in the library, or only the references found in a particular group.

      Click the *Web Library Info* button to see how many references are currently in the selected Web library and how many more references can be added to it before reaching the maximum limit.

Note: If the option to Transfer References from Web to Desktop is not available to you (greyed out), you likely have selected an EndNote library that is read-only. Make sure the file itself allows read-write access, and make sure it is not on a locked partition, a read-only CD, or any other read-only media.

   c. Click *Transfer* (or press Enter) to start transferring references.

When the process is completed, a message will tell you how many references were transferred.

Note: You can click *Cancel* to stop the transfer process. It may take a few moments to stop the operation, as the current cache of references will be processed first. A message will tell you how many references were already transferred before you cancelled the operation.

If you have transferred references from EndNote Web to your desktop library, you can easily see the subset of references; they are saved as a group in EndNote Web group set.

Regularly Updating a Transferred Reference List

You may regularly add references to your EndNote Web folder, and want to subsequently update your EndNote desktop library with the additions (or vice versa).

To update your desktop library, set these options on the EndNote Web Transfer References dialog:

Select the appropriate EndNote Web folder.

Select the option to “Transfer References from Web to Desktop.”

Each time you transfer references from the same EndNote Web folder, the matching references are replaced in your desktop library.

A matching reference is a reference that was entered once and then was transferred from EndNote Web to desktop or from EndNote desktop to EndNote Web. If you entered the same reference twice, once in EndNote Web, and then again in EndNote desktop, the records will be flagged with different Reference numbers and will be considered duplicates rather than exact matches. If you check the box to allow duplicates, your library could contain multiple copies of the same references. (EndNote will use the duplicate settings indicated in your EndNote preferences.)

References are never deleted when you transfer references. To permanently delete a reference from both the desktop library and the EndNote Web folder, you must delete it in both places.

Saving EndNote Web References to a Custom Group

You may occasionally want to save a set of EndNote Web references to a custom group.

To save an EndNote Web group as a custom group:

1. In the Groups pane, under EndNote Web, click on a group to display the list of references.
2. To select all references in the list, first click in the list, and then go to the *Edit* menu and choose *Select All*.
3. From the *References* menu, select *Add References To>New Group*.
4. Name and save the new group.

Using Cite While You Write with EndNote Web

Microsoft Word documents that use Cite While You Write are compatible with both EndNote desktop and EndNote Web. For general information about how to Cite While You Write, see Overview of the Cite While You Write Process and How to Cite While You Write.

Important Points about Cite While You Write and EndNote Web

While Cite While You Write support is included for both EndNote desktop and EndNote Web, they cannot be used simultaneously. See "Selecting the EndNote Application" below.

When the EndNote desktop program is selected as the Cite While You Write application, an *EndNote X4* submenu appears on the Tools menu in Word. When the EndNote Web program is selected as the Cite While You Write application, an *EndNote Web* submenu appears on the Tools menu in Word.

You can Cite While You Write with references from your personal Web library. You cannot directly Cite While You Write with references in folders shared by other EndNote Web users.

EndNote Web always looks for the curly braces "{" and "}" to delimit citations for Cite While You Write. You cannot use custom citation delimiters like you can in the desktop version of EndNote. We recommend that you always use the default curly braces to avoid missed citations during formatting.

EndNote Web does not support instant formatting.
Word 2003 : In Word, go to the *Tools>EndNote X4* menu and choose *Format Bibliography*.

Word 2007and 2010 : On the EndNote Web tab, in the Bibliography group, click the corner arrow dialog launcher.

EndNote Web does not support inserting or formatting figures. The *Find Figure(s)* and *Generate Figure List* commands will not be not available.

Various other Cite While You Write functions may not be active for EndNote Web; those commands will be dimmed and unavailable. The full Cite While You Write feature set is available for the desktop EndNote application.

Selecting the EndNote Application

You can use Cite While You Write with either your desktop version of EndNote or EndNote Web; a Cite While You Write plug-in for Microsoft Word is installed for each application. Use EndNote Web to cite references from a Web library; use EndNote desktop for a library stored on your computer.

Note: For workstations that do not have the desktop version of EndNote installed, you can download the EndNote Web plug-in for Cite While You Write from http:// www.myendnoteweb.com with a valid account.

To select the EndNote application for Cite While You Write:

1. **Word 2003** : In Word, go to the Tools menu, choose *EndNote X4* or *EndNote Web*, and then *Cite While You Write Preferences,* or, click the *EN Pref* icon on the EndNote toolbar.
   Word 2007and 2010 : On the EndNote tab, in the Tools group, click *Preferences* .
2. Click on the Application tab.
3. Select the appropriate EndNote application:

   EndNote is your desktop version of EndNote X4 .

   EndNote Web is the online Web version of EndNote X4 .
   If you select EndNote Web, you must also enter your subscription details, which includes the appropriate URL, your email address, and your password. You may opt to remember the email and password for future sessions.

The EndNote Toolbar

Word 2003 : An EndNote toolbar is available in Microsoft Word whether you are using the EndNote desktop or EndNote Web application. An easy way to tell which application is in use is to look at the title of the toolbar. It will indicate either *EndNote X4* (the desktop application) or *EndNote Web*.
Word 2007and 2010 : The EndNote tab will indicate either EndNote or EndNote Web.

Windows Mobile Device (Pocket PC)

Overview of Using EndNote on a Windows Mobile Device

A Windows Mobile® device is a handheld device, such as a Pocket PC®, which runs the Windows Mobile operating system. The terms "Windows Mobile device" and "Pocket PC" may be used interchangeably.

The EndNote application for handheld devices running the Windows Mobile operating system uses a format that supports all of the reference types and fields used in the desktop EndNote application.

You can enter EndNote references into your desktop EndNote library and/or into your handheld library. You can then synchronize files between your desktop EndNote library and your handheld EndNote library using standard ActiveSync® commands.

Hardware and Software Requirements (Windows Mobile)

Requirements for running EndNote on a Windows Mobile device include:

Windows Mobile handheld device, such as a Pocket PC (not including Smartphones)
Windows Mobile operating system 5 or later
Serial or USB communication for ActiveSync operations
16 MB RAM

EndNote is compatible with any Windows Mobile device that meets the hardware and software requirements.

Installing EndNote for the Windows Mobile Operating System

Installing EndNote for the Windows Mobile operating system involves several steps. First, make sure you meet the hardware and software requirements listed in the previous section. Then, you must:

1. Check your ActiveSync connection to make sure it is working.
2. Install the EndNote for Windows Mobile software.
3. Designate a single EndNote library for synchronizing.
4. Perform an initial ActiveSync operation to copy EndNote software to the Windows Mobile device, and then perform a second ActiveSync operation to copy the EndNote library to the Windows Mobile device.

Check Your ActiveSync Connection

Before you begin, make sure your Windows Mobile software is correctly installed. Connect your handheld device and perform an ActiveSync operation to make sure you are able to send files between your Windows Mobile desktop application and your Windows Mobile handheld device.

Install EndNote for Windows Mobile Software

It is best to install your Windows Mobile software (the application software that came with your handheld device) and connect your handheld device before installing or updating to EndNote X4. As you install EndNote, you will be asked whether you want to install the EndNote for Windows Mobile software.

Note: You may have already installed the EndNote for Windows Mobile software when you installed EndNote! Look for the EndNote application on your Windows Mobile device.

If you installed EndNote and then installed your Windows Mobile application software:

You can install EndNote for Windows Mobile in one of two ways:

Run the EndNote installer again, choose *Modify*, and select EndNote for Windows Mobile to install.

From your Windows Control Panel, choose *Add or Remove Programs*, highlight EndNote, click *Change*, and install EndNote for Windows Mobile.

Designate a Library for ActiveSync Operations

In EndNote, designate a library for ActiveSync operations:

1. Select an EndNote library from the existing drop-down list or use the *Browse* button to locate your EndNote library.

Note: The Windows Mobile operating system will accept a library filename that contains up to 26 characters. You will not be able to sync a library with a longer filename.

2. Click *OK* to save the setting.

Note: You can update your Windows Mobile device with only a single library. If you perform an ActiveSync operation with a new library, any existing library on your handheld device will be replaced.

Use the ActiveSync Manager to Set Up Your Windows Mobile Device

Perform an initial ActiveSync Operation to copy EndNote for Windows Mobile software to your handheld device. (For information about how to use the ActiveSync Manager, see Synchronizing Libraries.

Then, perform a ActiveSync operation again to copy your EndNote library to your Windows Mobile device.

Synchronizing Libraries (Windows Mobile)

Use standard ActiveSync instructions to synchronize your desktop EndNote library and your Windows Mobile device EndNote library. Use the ActiveSync application on the Windows Mobile device:

The first time you synchronize your desktop EndNote library with your Windows Mobile device, EndNote for the Windows Mobile operating system is copied to your Windows Mobile device. Subsequent ActiveSync operations synchronize the designated library.

You may want to modify ActiveSync settings to always sync your EndNote libraries when initiating an ActiveSync from your handheld device. In Microsoft ActiveSync, go to the Tools menu and choose *Options*, and then select the EndNote component for syncing. However, if ActiveSync is initiated every time you cradle your device, or periodically while it is connected, you may want to deselect the EndNote component for automatic syncing. See your Windows Mobile device documentation for more information about performing ActiveSync operations.

An ActiveSync operation cannot be initiated from within EndNote. However, once your EndNote library resides on the handheld device, you can use an "EndNote Pocket PC Synchronization" shortcut to initiate an EndNote library synchronization. From the *Start* menu, choose *All Programs*, then *EndNote*, and then *EndNote Pocket PC Synchronization*.

Note: The handheld library must reside in main memory; you cannot save a library to an expansion card.

Notes about Synchronization:

Before synchronizing your EndNote libraries, make sure EndNote is not open on the handheld device. Select *Menu* and then *Exit* to close EndNote.

You can synchronize your handheld library to a single desktop PC.

The Windows Mobile operating system will accept a library file name that contains up to 26 characters; you will not be able to sync a library with a longer filename. If your library filename is longer than 26 characters, you can rename the library with Windows Explorer. Remember to also rename the .DATA folder.

You can designate a single EndNote library to synchronize with your Windows Mobile device. In EndNote, go to the Tools menu, select *Configure Handheld Sync*, and use the dialog to select a library.

By default, an ActiveSync operation will synchronize the EndNote desktop library and handheld library, so that new references will appear in both libraries and edited references will be updated in both libraries.

You cannot copy only selected references to your Windows Mobile device; the entire designated library is synchronized. If you want to copy only a limited number of references to your handheld device, first copy those references to a smaller desktop EndNote library, designate that library in EndNote with *Configure Handheld Sync*, and then synchronize your Windows Mobile device with that interim library.

If you want to enter references on your Windows Mobile device, but not maintain the full desktop library on the device, use a smaller, interim library for synchronization. Enter your references on the handheld device, synchronize to the small desktop library, then copy the references from the small library to your full EndNote library. You can change ActiveSync settings to always overwrite the interim library with your handheld library.

The Windows Mobile device reference size limit is 64K. Longer references are truncated, and a message is written to the ActiveSync Log.

Windows Mobile is Unicode compliant, so characters entered into your desktop library will transfer correctly. However, character entry and display may be limited by the default handheld device keyboard and character recognizer. Third party software packages are available for the Windows Mobile operating system, which include specialized keyboards and recognizers, that allow expanded data entry (such as Greek or Hebrew characters).

Only the name of the figure is displayed in a Figure field on your handheld device. The figure name is locked (you cannot edit it) so that the file attachment in the desktop library will remain intact. Figures cannot be added on the handheld device. If you delete a reference with a figure from your device, synchronizing will delete both the reference and its corresponding figure from the desktop library.

What if you have changed a reference in both the desktop library and the handheld library?

If you edit the same reference in the desktop library and the handheld library, neither record will be overwritten when you synchronize the libraries. EndNote will ask you to resolve the conflict.

You can select either the version of the reference that was modified in the EndNote desktop library or the version of the reference that was modified on the Windows Mobile device. You can also save the setting to be used automatically when future conflicts arise.

Starting EndNote for Windows Mobile and Displaying References

To start EndNote on your Windows Mobile device and open the EndNote library:

1. On your Windows Mobile device, list the Programs available and tap on the EndNote icon. (EndNote will appear on the *Start* menu if you have used it recently.)
2. Highlight the library name and tap *Open*. EndNote displays the designated library.

A reference list appears, displaying the first author's last name, the year, and the first title of each reference in the library.

Notes about the reference list:

The title bar shows the name of the current library.

The first author, year, and title are each truncated to fit within its column.

Tap on a column header to sort the list by that column of information. Tap the same column header again to switch between ascending and descending order. This is a simple alphabetic sort that may not display in exactly the same order as your desktop library. Author names are not manipulated, and initial articles are not ignored in titles.

The reference list is equivalent to the *All References* view in the desktop version of EndNote. Groups are not available for viewing. While existing groups are maintained, you cannot view or modify them on the Windows Mobile device.

To jump to a particular reference, enter characters with the handheld device keyboard to scroll to that text in the current sort order. For example, in a library sorted by author, entering "DON" could scroll the list to "Donnelly."

To create a new reference, tap *Menu* and select *New Reference*.

To open a reference for viewing or editing, tap twice on the row. Or, tap once on the reference to highlight it, tap *Menu*, and select *Edit*.

You can touch the screen for an extended period of time to display a contextual menu. The contextual menu displays the commands that are available and active when you tap *Menu*.

Entering, Editing, and Deleting References (Windows Mobile)

To enter a new EndNote reference on your Windows Mobile device:

1. Display the EndNote library reference list, or an individual reference.
2. Tap *Menu* and select *New Reference* to display a New Reference template.
3. Use the drop down list in the Reference Type field to select a reference type.
4. Enter your text into the appropriate fields. See "Notes about entering and editing references" below.
5. Tap *OK* to add the reference to your handheld EndNote library.

   You will be asked to confirm changes. Tap *Yes* to save the new reference, *No* to exit without saving, or *Cancel* to continue adding to the new reference without saving.

To edit a reference on your Windows Mobile device:

1. With the reference list displayed, tap to highlight the reference you want to edit.
2. Tap *Menu* and select *Edit* to open the highlighted reference for viewing or editing. (Or, you can tap twice on the reference you want to edit.)

Notes about entering and editing references:

The title bar displays as much as possible of the first author’s last name, year, and reference number.

The drop-down list in the Reference Type field displays the current reference type. Tap on the triangle to show the complete list of reference types and select one.

Use the up and down scroll arrows or the scroll bar to scroll through the current record.

Use the left and right navigation arrows to browse through references in the current sort order.

Up to three lines are displayed for each field of data. You can edit those three lines directly. However, if a field contains more than three lines of information, an ellipsis (…) will appear to indicate the field has more data. Tap on the field to open a full-screen display (where you can view and edit the entire field).

Tap the *Summary* tab and then *Menu* to access the standard editing commands: *Undo, Cut, Copy, Paste, Clear,* and *Select All*.

You can suppress the view of empty fields. Tap *Menu* and select or deselect *Show Empty Fields*.

Tap the *Notes* tab to easily add a Note to the reference.

Character entry and display may be limited by the default handheld device keyboard and character recognizer. Third party software packages are available for Windows Mobile, which include specialized keyboards and recognizers, that allow expanded data entry (such as Greek or Hebrew characters).

The Windows Mobile reference size limit is 64K. Text beyond that amount is truncated when you save the reference.

Tap the *OK* button in the upper right corner to save changes to the field and return to the reference window.

Tap the *Cancel* button in the lower left corner to throw away all changes to the field and return to the Reference View.

You can touch the screen for an extended period of time to display a contextual menu. The contextual menu displays the commands that are available and active when you tap *Menu*.

To delete a reference on your Windows Mobile device:

You can delete a reference in one of these ways:

With the reference list displayed, tap to highlight the reference you want to delete, then tap *Menu* and select *Delete Reference* to delete the highlighted reference.

With the reference list displayed, find the reference you want to delete and touch it for an extended period of time to display a contextual menu. Select *Delete Reference*.

With the reference open for editing, tap *Menu* and select *Delete Reference* to delete the current reference and return to the reference list.

Searching a Handheld EndNote Library (Windows Mobile)

To jump to a particular reference in the reference list:

Enter characters with the handheld device keyboard to scroll to that text in the current sort order. For example, in a library sorted by author, entering "DON" could scroll the list to "Donnelly."

To search all fields:

1. Display your EndNote library reference list.
2. To enable searching:

   Tap the *Find* icon (magnifying glass) on your Windows Mobile device, or,

   Tap *Menu* and choose *Find*.

3. The library name in the title bar disappears to allow space for you to enter the word or phrase you wish to locate.

The search is executed as you type, with matching references appearing in the list. Then:

To view or edit a reference, highlight it in the list, tap *Menu*, and select *Edit*.

To close the search results and return to the library view, tap the X to the right of the search term.

Viewing Library Statistics (Windows Mobile)

To view statistics about the EndNote library on your Windows Mobile device:

1. Start the EndNote application on your handheld device to display the reference list.
2. Tap *Options*, and then *Database Info,* to display statistics about the library.

Statistics include the library name, the date created, the date modified, the file size, and the number of references found in the library.

Setting EndNote Preferences (Windows Mobile)

To view or modify EndNote preferences on your Windows Mobile device:

1. Start the EndNote application on your Windows Mobile device. Do not open your EndNote library.
2. Tap *Options*, and then *Preferences*.

Two tabs are available: Preferences and Advanced.

Preferences Tab

Show Splash Screen at Startup

Use this option to enable or disable the splash screen display that appears when you start the EndNote for Windows Mobile program.

Default Reference Type

Use the list to select a default reference type to assign to new references added to your Windows Mobile device. The default is set to Journal Article. You can always change the reference type when entering or editing a reference.

Tap *OK* to close the screen, save any changes, and return to the previous window.

Advanced Tab

Library File

If you have changed the location or the name of the EndNote library on your Windows Mobile device, you must point to the new location and/or name.

Fast Search Option

Searching the reference list is faster if the search is limited to only the visible columns of information. You can select the check box to limit searching and increase speed.

Reset Defaults

At any time, you can tap *Reset Defaults* to return to the default path and filename for the EndNote library on your Windows Mobile device. The default location and name are:

\Program Files\EndNote\Library.sdf

Tap *OK* to close the screen, save any changes, and return to the previous window.

Windows Installations

Program Requirements (Windows)

Both the full EndNote program and the EndNote Demo are available on CD or by downloading. If you have a CD you need a CD-ROM drive to install the program.

System Requirements

EndNote runs under the following operating systems:

- Windows 7 (32 or 64 bit versions)
- Windows Vista (32 or 64 bit versions)
- Windows XP with at least Service Pack 3 installed

Hardware Requirements

- A personal computer with a Pentium (or compatible)
- 450-MHz or faster processor
- A minimum of 256 MB of available RAM
- A hard drive with at least 180 MB of free space
- An Internet connection is required in order to use EndNote's Online Search feature for searching online databases, the Find Full Text feature, or EndNote Web. To use the Open Link command to access a Website, you also need a Web browser installed.
- Unicode compliant
- Handhelp compatibility—16 MB RAM
  - Windows Mobile® 5x device; Serial /USB Active Synce

Make sure that your computer meets the system and hardware requirements before continuing. If necessary, contact the distributor, dealer, or store where you purchased EndNote to arrange for a full refund. If you have any problem obtaining a refund, contact Thomson Reuters directly. You must do so within 30 days of purchase.

Word Processor Compatibility

As of June 2010, EndNote for Windows is compatible with:

- Microsoft Office Word 2003m 2007, 2010 for Windows
- Open Document Format (ODT) documents created with OpenOffice.org Writer
- RTF files created with most word processors, including: Microsoft Word, WordPerfect, OpenOffice.org Writer, StarOffice, and WordPad

Automatically Updating Files (Windows)

You can automatically update EndNote X4 when incremental program enhancements are available.

To update your copy of the EndNote program:

1. Open a connection to the Internet.
2. From the Help menu, select:

- EndNote Program Updates to launch a wizard. The wizard checks for an update, lets you know whether an update is available, and then downloads the file(s) and applies the update to your EndNote installation.
- Web Styles Finder to direct your browser to an EndNote web page where you can download from the full collection of output styles.

Note: You also have the option to download the latest content files at any time from our Web site at http://www.endnote.com. We continually update output styles, filters, and connection files.

Custom Installations / Adding Content Files (Windows)

Although we recommend that you use the Typical installation option to install EndNote, the Custom installation option can be useful if you are low on disk space, or if you need to reinstall only certain EndNote components, of if you would like to add additional content files (output styles, import filters, and/or connection files).

To do a new custom installation:

1. Follow the instructions for installing EndNote X4 from the Getting Started Guide.
2. On the dialog titled “Select Installation Type,” select *Custom*.
3. When you get to the dialog titled “Select Features,” read the section below called "Selecting Features" to determine what you would like to select/deselect for installation.

Note: If the installer detects another copy of EndNote in the destination folder, it gives you options to either backup or remove older files during the installation. When doing a custom install, only selected components are affected. For example, if you are installing only the Anthropology styles, and you choose to remove older files, only the older Anthropology styles are removed; no other part of the installation is affected.

To install components after EndNote X4 is already installed:

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. Do one of these:

   Start the EndNote installation program as you would for a new installation.

   From the Windows *Start* menu, select *Control Panel*, or choose *Settings* and then *Control Panel*. Then, choose *Add or Remove Programs*. In the list, click on *EndNote X4* and then *Change*.
3. On the “Application Maintenance” dialog, select the *Modify* option and click *Next*.
4. When you get to the “Select Features” dialog, read the section below called "Selecting Features" to determine what you would like to select/deselect for installation.

Selecting Features

There are several major categories of components that can be installed with the product. The components you can select for installation include:

EndNote Application

- EndNote Program
- Sample Files
- EndNote Help

- PDF Manual

Word Templates/Add-ins:

- Templates for Microsoft Word
- Cite While You Write for Microsoft Word

Additional Styles: These formats for creating bibliographies are grouped by type.

Additional Connections: These files for directly retrieving references from online reference databases are grouped by information service provider.

Additional Filters: These files for importing text files of reference data are grouped by information service provider.

Spelling Dictionaries: These are dictionaries available for the spelling checker.

EndNote for Windows Mobile: These are files required for using EndNote for the Windows Mobile operating system.

Click the plus sign next to each category to display a detailed list of items. For each category or subcategory, click the triangle next to the name to select from the available installation options. To install a feature, select one of these:

- Will be installed on local hard drive.
- Entire feature will be installed on local hard drive.

Installed Files (Windows)

The full EndNote installation includes the following default folders and files.

Program Folder

C:\Program Files\EndNote X4, OR

C:\Program Files (x86)\EndNote X4 (64-bit Windows versions)

- EndNote.exe application file
- EndNote.chm help file
  You can double-click the file to view it. In the EndNote program, select *EndNote X4 Help* from the *Help* menu. Pressing the F1 key on your keyboard or clicking a *Help* or *?* button in the program brings up a context-sensitive topic.
- Readme.txt text file contains late-breaking news
- GettingStartedGuide.pdf gives a tour of the program
- Examples shortcut folder
  This is a shortcut to an Examples folder that contains sample files to follow the guided tour found in the Getting Started Guide, and to experiment with while learning EndNote.
- Styles folder
  This folder contains bibliographic styles for formatting citations and a bibliography. In EndNote X4, a *Typical* installation includes 192 style files. With a *Custom* installation, you can choose from a full collection of over 4,500 bibliographic styles.

- Connections folder
  This folder contains connection files to connect to and search online bibliographic databases. A *Typical* installation includes only the most popular 100 files. With a *Custom* installation, you can choose from a collection of thousands.

- Filters folder
  This folder contains import filters for importing text files downloaded from online bibliographic databases. In EndNote X4, a *Typical* installation includes 263 filters. With a *Custom* installation, you can choose from a collection of hundreds.

- Terms Lists folder
  This folder contains journal abbreviation term lists. These lists contain thousands of journal names and standard abbreviations. Import a list into your library's Journals term list to use the abbreviations in your bibliographies.

- Spell folder
  This folder contains spell check dictionaries for the EndNote spell checker.

- Templates folder
  This folder contains Microsoft Word templates to quickly set up your papers for electronic submission to publishers.

- Pocket PC folder
  This folders contain Read Me files and support files that allow you to keep an EndNote library on a Windows Mobile device.

- Various additional folders and files are installed to support the EndNote program and to integrate EndNote with other software programs.

Shared Folder

Open the Shared Documents or Public Documents folder in Windows Explorer to find the EndNote folder located at:

Windows 7: \Users\Public\Public Documents\EndNote

Windows XP: Documents and Settings\All Users\Shared Documents\EndNote

Windows Vista: C:\Users\Public\Public Documents\EndNote

- Examples folder
  This folder contains a sample library and other sample documents and graphics to use while learning EndNote.

- You may want to use the shared EndNote folder to store your libraries, so that they are available to all users on your computer.

Personal Folder

Open the My Documents or Documents folder in Windows Explorer to find the EndNote folder located at:

Windows 7: C:\Users\[UserName]\Documents\....

Windows XP: C:\Documents and Settings\[UserName]\My Documents\EndNote

Windows Vista: C:\Users\[UserName]\Documents\EndNote

These folders are created when you create or modify a file:

- Styles folder contains new or modified bibliographic styles

- Connections folder contains new or modified connection files

- Filters folder contains new or modified import filters

While the program folder contains the default styles, connection files, and filters, your personal EndNote folder contains those files that you have created or modified. This prevents changes to the original files, and assures that you will not inadvertently delete a customized file when you remove or upgrade the EndNote program. It also allows you to make changes to files even though you may not have administrator access to modify files in the Program Files folder. EndNote displays a single list of the files found in both locations. If a file of the same name appears in both locations, EndNote will display only the file found in your personal folder.

Preferences Folder

Depending on your settings, these folders may be hidden from view in Windows Explorer.

Windows 7: C:\Users\[UserName]\App Data\Roaming\EndNote

Windows XP: C:\Documents and Settings\[UserName]\Application Data\EndNote

Windows Vista: C:\Users\[UserName]\App Data\Roaming\EndNote

While many EndNote preferences are stored in the Windows registry, some are stored in your personal preferences folder. It contains the connect.log file that records your latest online search, the RefTypeTable.xml file that stores your reference type preferences, saved search strategies, and various other settings.

Uninstalling the EndNote Program (Windows)

To uninstall EndNote:

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. From the Windows Start menu, select *Control Panel*, or choose *Settings* and then *Control Panel*.
3. Select *Add or Remove Programs*.
4. In the list of currently installed programs, select *EndNote X4*.
5. Click the *Remove* button.

Or, you can uninstall by using the EndNote installation program:

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. From your EndNote CD, run Setup.exe.
3. On the “Application Maintenance” dialog, select *Remove* and click *Next*.
4. Click *Next* again to begin removing EndNote.

The uninstall procedure removes only files, groups, and icons installed by the EndNote installer the *last* time it was run. For example, if you used the installer’s *Custom* installation option to reinstall only style files, the Uninstall program removes only style files.

To remove any modified EndNote files that remain:

We purposely do not remove any EndNote libraries or customized files. You can manually delete these files with Windows Explorer. Once you are sure you do not want to save any of the files contained in the following folders, you can delete them:

Windows XP
C:\Program Files\EndNote X4
C:\Documents and Settings\All Users\Shared Documents\EndNote

C:\Documents and Settings\[UserName]\My Documents\EndNote
C:\Documents and Settings\[UserName]\Application Data\EndNote

Windows Vista
C:\Program Files\EndNote X4
C:\Users\Public\Public Documents\EndNote
C:\Users\[UserName]\Documents\EndNote
C:\Users\[UserName]\App Data\Roaming\EndNote

windows 7

C:\Program Files\EndNote X4
C:\Users\Public\Public Documents\EndNote
C:\Users\[UserName]\Documents\EndNote
C:\Users\[UserName]\App Data\Roaming\EndNote

Note: If you are using a 64-bit version of Windows, your EndNote program folder will be: C:\Program Files (x86)\EndNote X4.

Networks and Volume Installations

Using EndNote on a Network

Using Libraries on a Network

The volume edition of EndNote is licensed for a particular number of users; you can install EndNote locally for each of the licensed users. Users can access a common library on a server or their own personal library.

Multi- Platform Networks

EndNote libraries (databases) are directly compatible across Windows and Macintosh platforms and do not require any special conversion procedures (see Transferring_Libraries_Across_Platforms). Because of this, EndNote can be used in a mixed platform network environment very easily. We have successfully tested EndNote libraries on mixed platform AppleShare and Windows networks, and PC- specific networks including Windows for Workgroups.

Multi-User Library Access

Even though EndNote can be used across a network, it was not designed with specific networking capabilities in mind. EndNote does not perform record locking functions that would allow multiple users to *edit* one library at the same time. However, multiple users can *access* one EndNote library simultaneously as long as the library is restricted to **read-only** or **locked** status. This will allow the user to perform searches, copy information to their documents, and format their papers. Use Windows Explorer to change the Properties of your EndNote library; select the Read-Only attribute for the . ENL file and the .DATA folder.

The simplest way to set up an EndNote library for shared network access is to use the network's system of file permissions to control the type of access allowed for users and groups. One or two people should be assigned the responsibility for maintaining and updating the library; these users should be granted full access to the library . ENL file and .DATA folder. All other users should be granted read-only access.

Special Issues in Network Environments

EndNote does not perform record locking, but it does **require** file locking. Some Windows network client programs (for example, NFS clients used to connect to UNIX servers) do not fully support these protocols. File locking is an optional component in some implementations of NFS (LockD). In addition, some network file systems implement a compatibility mode that may prevent file locking from working properly. Network clients other than those provided by Microsoft should be tested to ensure that file locking is enabled.

EndNote assumes a maximum file name length based on the capabilities of the operating system on which it is running; under Windows, errors may occur if EndNote attempts to store a long file name on a server that does not support long file names.

Note: The environment in which EndNote will be used, must support long file names.

Custom Settings

EndNote allows you to customize many areas of the program to suit your needs. Most settings are saved for each user.

General Preferences

Most general preferences are stored in the Windows Registry . For example, this includes many EndNote Preferences, subject bibliography settings, and Cite While You Write settings.

Reference Types

If you plan to share your libraries with other users, you may want to limit use of new and modified reference types.

- Changes made to the reference types table apply to all libraries opened on that computer from the current user account.
- If your library is opened from a different computer, your references will follow the layout of the reference types table for that computer and user.

If you create a custom reference type or modify a reference type for records in your EndNote library, you should make sure that the reference type is also created or modified on other computers that will access the library. See Sharing Your Reference Type Table.

Saved Searches

Search strategy files are saved by default in your folder:

Windows XP: C:\Documents and Settings\[UserName]\Application Data\EndNote\Searches

Windows Vista: C:\ Users\[UserName]\ AppData\Roaming\EndNote\Searches

You may save them elsewhere if you prefer, but EndNote will open to this Searches folder when you choose to Load a saved search. EndNote search files use ". ENQ" as the file name extension.

Cite While You Write

Cite While You Write codes are directly compatible between Word 2003 and 2007 . Because reference data is kept with each formatted citation, you can collaborate with other authors on a paper without each author having the same library.

Volume Installations

About Volume Installations

The volume edition of EndNote is licensed for a particular number of users; you can install EndNote locally for each of the licensed users. Users can access a common library on a server or their own personal libraries.

For volume installations, you must first unlock the installer as described in Unlocking the Volume/Site License Installer, and then distribute and install the program using one of the methods described in About Mass Program Installations.

Networks and Volume Installations (Licensing of Volume Copies)

Thomson Reuters expects that network administrators will take appropriate steps to maintain compliance with the software license. The license agreement (License Agreement.txt) can be found at the root of the EndNote installation CD. You can purchase a single or multi-user license:

Single User License

A single EndNote product purchase is licensed to an individual, and is not to be shared.

Workstation License

An EndNote workstation license allows each person to install EndNote individually, just like a single purchase. Workstation licenses are typically sold as 5-user packs, and you can purchase additional packs as needed.

Volume/Site License

An EndNote volume/site license allows multiple users. EndNote can be installed on individual PCs using mass installation (up to the number of users indicated in the license agreement) .

Note: While we do not provide a concurrent metering utility, it is possible to use third party software to monitor concurrent use of EndNote. We recommend that you use SofTrack™, which is available for purchase at discounted pricing directly from Thomson Reuters. Go to Integrity Software for more information about this product.

Unlocking the Installer

Unlocking the Volume/Site License Installer (Windows)

The Volume/Site license installer uses a single product key for multiple users. To automatically include the key for your licensed users, you must unlock the installer. This produces a new installer file, along with a validating license.dat file.

Note: This information applies only to the Volume/Site license installer, and does not apply to any other EndNote licenses.

To unlock the volume/site license installer with Autorun:

1. Insert the EndNote X4 installation CD.

   The EndNote Setup program will start. If you do not have Autoplay enabled, view the files on the CD and launch Autorun.exe.

2. Choose "Install Volume License" from the list.

3. When prompted, enter your EndNote volume license product key.

   Do not select the option titled "Perform Administrative Installation."

   When the installation is complete, you will find an ENX4 Inst.msi file and a license.dat file in the target folder. These files must both be present in the same folder to install the EndNote program as either as a shared program, or to distribute for mass program installations.

Or, to unlock the volume/site license installer with the command line:

1. Open an MS-DOS command line.

   Windows XP: From the *Start* menu, choose *Run*, type " CMD" and click *OK*.

   Windows Vista: Go to the *Start* menu. In the search box, type " CMD" and press *Enter*.

   Windows 7: Go to the *Start* menu. In the search box, type " CMD" and press *Enter*.

2. Use the Change Directory command (CD) to go to the location where the ENX4 Inst.msi file is located. The EndNote installation CD is likely in the D drive, and the ENX4 Inst.msi file is located in the MSI folder. To go to this location on the command line, type:

   CD D:\MSI

   If your computer uses a different drive letter for the installation CD, or the MSI file is in another location, use CD with the appropriate path to go to that location.

3. Next, run the installer in Admin mode by entering the command:

   msiexec /a ENX4 Inst.msi

4. When prompted, enter your EndNote volume license product key.

   Do not select the option titled, "Perform Administrative Installation."

   When the installation is complete, you will find an ENX4 Inst.msi file and a license.dat file in the target folder. These files must both be present in the same folder to install the EndNote program. See About Mass Program Installations.

Mass Program Installations

About Mass Program Installations (Windows)

With the volume/site license version of EndNote, a network administrator can use mass installation to install EndNote on multiple machines.

Please make sure that you meet these requirements before installing:

- Make sure EndNote is licensed for the appropriate number of users.
- Make sure that each computer is running Windows XP with Service Pack 3, Windows Vista, or Windows 7. EndNote X4 will not run under earlier versions.

The product CD includes an ENX4 Inst.msi file in an MSI folder. In Administrative Mode, the EndNote installer will prompt for a volume product key, which generates a license.dat file. The license.dat file must accompany the installer for volume license distribution in order to later bypass the product key installation prompt. See Unlocking the Volume/Site License Installer.

You can deploy the EndNote installer to multiple machines in one of these ways:

- Easy Deployment
- Deploying the EndNote Installer with Group Policy
- Scripted Program Installations

You can use the provided MSI Command Line Options for guidance. If you need additional information, refer to Microsoft's mass installation documentation and command line documentation, or http://www.microsoft.com.

What you need to know about installing content files:

Previous versions of EndNote always installed all predefined content files (output styles, import filters, and connection files). These number in the thousands, and when they are all installed they can affect the speed and performance of EndNote. In EndNote X4 , a typical installation includes only the 100 most popular styles, filters, and connection files. If you do not know what subset of files are required by your users, you may want to install all files. You can do this by setting the property "INSTALLALLCONTENTFILES" to "yes". See Installing All Content Files.

Easy Deployment

With the volume/site license version of EndNote, a network administrator can use mass installation to install EndNote on multiple machines.

Recommended easy installation:

1. First, unlock the installer to generate an ENX4 Inst.msi file and a license.dat file. See Unlocking the Volume/Site License Installer.
2. Deploy ENX4 Inst.msi and license.dat together.

You can deploy in any way you want, but make sure the two files are in the same directory when executed. You could zip the two files to distribute them to end users, you could create a Group Policy deployment where both files are delivered to the same location on the target machine, or you could simply drop the two files in a shared network location from which users execute the installer.

3. (Optional) For each user account, you can configure EndNote as the default citation manager in Word 2007. See Configuring EndNote (Word 2007).

Using the volume installer to install on an individual computer:

1. First, unlock the installer to generate an ENX4 Inst.msi file and a license.dat file. See Unlocking the Volume/Site License Installer.
2. Distribute both the ENX4 Inst.msi and license.dat file to the user. For example, you can copy them to a shared network drive or a CD.
3. The user should then copy the two files, ENX4 Inst.msi and license.dat to the same folder on his/her individual computer.
4. The user should log on to the computer with administrative rights, and then run ENX4 Inst.msi to install the EndNote program. (Do not run in Admin mode this time.)
5. (Optional) For each user account, you can configure EndNote as the default citation manager in Word 2007. See Configuring EndNote (Word 2007).

Deploying the EndNote Installer with Group Policy (Windows)

If your network is running the Windows 2000 or Windows 2003 Server operating system and Active Directory Services (ADS), we recommend a Group Policy installation for the volume version of EndNote.

Before you begin:

- Make sure all workstations are using MSI 3.0 or later. If needed, you can download an update from Microsoft.
- Make sure the share that EndNote is being deployed from is published in Active Directory.
- Make sure the *computer* account has permission to access to the share.

Note: This software has not been tested with the Windows Distributed Filing System (DFS)

Note: By default, only the 100 most popular output styles, import filters, and connection files are installed with EndNote. This speeds up performance. However, if you want to install all of the available content files (thousands), you can create a new Transform and set the INSTALLCONTENTFILES property to "yes". See Installing All Content Files.

New Installations

To deploy across an organization with Group Policy:

1. First, unlock the installer to generate an ENX4 Inst.msi file and a license.dat file. See Unlocking the Volume/Site License Installer.
2. Open the Group Policy for the Domain or Organizational Unit (OU) you want to modify.
3. Under "Computer Configuration," expand "Software Settings" and click *Software Installation*.
4. Right-click "Software Installation" and choose *New>Package*.
5. Browse for the share from which ENX4 Inst.msi will be deployed. (Make sure the required license.dat file is in the same folder.)
6. In the Deploy Software dialog, you may choose either *Assigned* or *Advanced* if you wish to modify the advanced settings. See the appropriate Microsoft help file for help on configuring the advanced

options.

Once the Group Policy is updated and the clients are restarted, EndNote is installed upon boot.

7. (Optional) For each user account, you can configure EndNote as the default citation manager in Word 2007. See Configuring EndNote (Word 2007).

Upgrade Installations

To upgrade your current installations:

1. First, unlock the installer to generate an ENX4 Inst.msi file and a license.dat file. See Unlocking the Volume/Site License Installer.
2. Open the Group Policy for the Domain or Organizational Unit (OU) you want to modify.
3. Under "Computer Configuration," expand "Software Settings" and click *Software Installation*.
4. Right-click "Software Installation" and choose *New>Package*.
5. Browse for the share from which ENX4 Inst.msi will be deployed. (Make sure the required license.dat file is in the same folder.)
6. In the Deploy Software dialog, choose *Advanced* and then click on the Upgrade tab.

   Once the Group Policy is updated and the clients are restarted, EndNote is installed upon boot.
7. (Optional) For each user account, you can configure EndNote as the default citation manager in Word 2007. See Configuring EndNote (Word 2007).

Scripted Program Installations (Windows)

If your network is running Windows NT 4 network or a non-ADS network, use scripting for mass installations of the EndNote program. An ENX4 Inst.msi file is provided on the product CD in an MSI folder.

To install via a command line:

1. First, run the installer in Admin mode (/a on the command line):

   msiexec.exe /a ENX4 Inst.msi PIDKEY="<valid volume license key>" TARGETDIR="<valid path>"

   When the installation is complete, you will find an ENX4 Inst.msi file and a license.dat file in the target directory.
2. Install ENX4 Inst.msi from the target directory. (Make sure the required license.dat file is in the same directory.)

   See the examples below. Drive letters are examples and vary according to the specific system and/or network.

   Example:
   msiexec.exe /i D:\MSI\ENX4 Inst.msi INSTALLDIR="C:\Program Files\EndNote"

   By default, only the 100 most popular output styles, import filters, and connection files are installed with EndNote. This speeds up performance. However, if you want to install all of these content files (thousands), use the INSTALLCONTENTFILES property.

   Example:
   msiexec.exe /i D:\MSI\ENX4 Inst.msi INSTALLDIR="C:\Program Files\EndNote"
   INSTALLALLCONTENTFILES=yes

   To write a log file, use the "/ l" switch. The following example specifies installing EndNote on a computer

using the ENX4 Inst.msi file found on N:\ EndNote\Program\" and write a log file to C:\ logs\ called endnotemsi.log using the verbose setting.

Example:
msiexec.exe /i "N:\EndNote\Program\ENX4 Inst.msi" INSTALLDIR="C:\Program Files\EndNote" / l*v! C:\ logs\endnotemsi.log

Use the provided MSI Command Line Options table for guidance. If you need additional information, refer to Microsoft's mass installation documentation and command line documentation, or http:// www.microsoft.com .

MSI Command Line Options (Windows)

Option	Parameters	Description
/I	*Package\ProductCode*	Installs or configures a product.
/ f	[p|o|e|d|c|a|u|m|s|v] *Package\ProductCode*	Repairs a product. This option ignores any property values entered on the command line. the default argument list for this option is " pecms." This option shares the same argument list as the REINSTALLMODE property. p – Reinstalls only if file is missing. o – Reinstalls if file is missing or an older version is installed. e – Reinstalls if file is missing or an equal or older version is installed. d – Reinstalls if file is missing or a different version is installed. c – Reinstalls if file is missing or the stored checksum does not match the calculated value. Only repairs files that have **msidbFileAttributesChecksum** in the Attributes column of the File table. a – Forces all files to be reinstalled. u – Rewrites all required user-specific registry entries. m – Rewrites all required computer -specific registry entries. s – Overwrites all existing shortcuts. v – Runs from source and recaches the local package. Do not use the **v** reinstall option for the first installation of an application or feature.
/a	*Package*	Administrative installation option. Installs a product on the network.
/x	*Package\ProductCode*	Uninstalls a product.
/ j	[u|m]*Package* or [u|m]*Package* / t *Transform List* or [u|m]*Package* / g *LanguageID*	Advertises a product. This option ignores any property values entered on the command line. u – Advertises to the current user. m – Advertises to all users of machine. g – Language identifier. t – Applies transform to advertised package.
/ l	[i|w|e|a|r|u|c|m|o|p|v|x|+|!] *Logfile*	Specifies path to log file. Flags indicate which information to log. i – Status messages.

		w – Nonfatal warnings. e – All error messages. a – Start up of actions. r – Action-specific records. u – User requests. c – Initial UI parameters m – Out-of-memory or fatal exit information. o – Out-of-disk-space messages. p – Terminal properties. v – Verbose output. x – Extra debugging information. Only available on Windows Server 2003. + – Append to existing file. ! – Flush each line to the log. "*" – Wildcard, log all information except for the v and x options. To include the v and x options, specify "/ l*vx".
/ m	*filename*	Generates an SMS status . mif file. Must be used with either the install (-i), remove (-x), administrative installation (- a_, or reinstall (- f) options. The ISMIF32.DLL is installed as part of SMS and must be on the path. The fields of the status mif file are filled with the following information: Manufacturer – Author Product – Revision Number Version – Subject Locale – Template Serial Number – not set Installation – set by ISMIF32.DLL to " DateTime" InstallStatus – "Success" or "Failed" Description – Error messages in the following order: 1) Error messages generated by installer. 2) Resource from Msi.dll if installation could not commence or user exit. 3) System error message file. 4) Formatted message: "Installer error %i", where %i is error returned from Msi.dll.
/p	*PatchPackage*[;*patchPackage2*...]	Applies a patch. To apply a patch to an installed administrative image you must combine options as follows: /p < *PatchPackage*>[;*patchPackage2*...] /a <*Package*>
/ q	n|b|r|f	Sets User interface level. q, qn – No UI qb – Basic UI. Use qb! to hide the **Cancel** button. qr – Reduced UI with no modal dialog box displayed at the end of the installation. qf – Full UI and any authored FatalError, UserExit, or Exit modal dialog boxes at the end. qn+ – No UI except for a modal dialog box displayed at the end. qb+ – Basic UI with a modal dialog box displayed at the

		end. The modal box is not displayed if the user cancels the installation. Use qb+! or qb!+ to hide the **Cancel** button. qb- – Basic UI with no modal dialog boxes. Please note that / qb+- is not a supported UI level. Use qb-! or qb!- to hide the **Cancel** button. Note that the ! option is available with Windows Installer version 2.0 and works only with basic UI. It is not valid with full UI.
/? or /h		Displays copyright information for Windows Installer.
/ y	*Module*	Calls the system API DllRegisterServer to self-register modules passed in on the command line. For example, msiexec / y MY_FILE.DLL. This option is used only for registry information that cannot be added using the registry tables of the . msi file.
/ z	*Module*	Calls the system API DllUnRegisterServer to unregister modules passed in on the command line. For example, msiexec / z MY_FILE.DLL. This option is used only for registry information that cannot be removed using the registry tables of the . msi file.
/ c		Advertises a new instance of the product. Must be used in conjunction with / t.
/ n	*ProductCode*	Specifies a particular instance of the product. Used to identify an instance installed using the multiple instance support through a product code changing transforms.

Changing the Default Content File Location (Windows)

Content files include output styles, filters, and connections files. These are typically installed in the EndNote program folder. For example:

C:\Program Files\EndNote X4\Styles
C:\Program Files\EndNote X4\Filters
C:\Program Files\EndNote X4\Connections

However, you may want to install the default content files in a folder other than the EndNote program folder. You may want to use a common, shared folder for all users in your organization.

Note: Remember that EndNote compiles style, filter, and connection file lists from both the default installation folder and a user's personal content folders. For information about setting a personal folder location, see Folder Locations Preferences.

Below are two methods that an administrator could use to run the installer and tell EndNote to relocate the "main" content file locations. The < path_to_content_folders> should be set to the parent path of the content folders. For instance, if the Styles, Filters, and Connections folders are located at D:\ Shared\Content\, that path should be used for CFDIR.

Method 1: Specify a custom folder path via command line

This method will work for most users, who install EndNote by launching the installer. To install EndNote with a custom content file folder setting:

For EXE installations:

ENX4Inst.exe CFDIR="< path_to_content_folders>"

For MSI installations:

msiexec.exe /I ENX4Inst.msi CFDIR="< path_to_content_folders>"

Method 2: Specify a custom folder path via transform

This method is for site system administrators, who want the end user to install or deploy the application without the user changing settings.

Update the value of the " CFDIR" property in the Property table, save the transform, and create the group policy object to deploy the installer with the transform. (See the transform documentation for the tool you are using, such as Orca.)

Installing All Content Files (Windows)

Content files include output styles, filters, and connections files. Earlier releases of EndNote installed all available content files. The number of predefined content files is now in the thousands, and may adversely affect the speed and performance of EndNote. Your users, however, may prefer to have access to all files.

Note: You can combine this command along with changing the default content file path. See Changing the Default Content File Location.

Method 1: Change the setting via command line

This method will work for most users, who install EndNote by launching the installer. To install all content files with EndNote:

For EXE installations:

ENX4Inst.exe INSTALLALLCONTENTFILES=yes

For MSI installations:

msiexec.exe /I ENX4Inst.msi INSTALLALLCONTENTFILES=yes

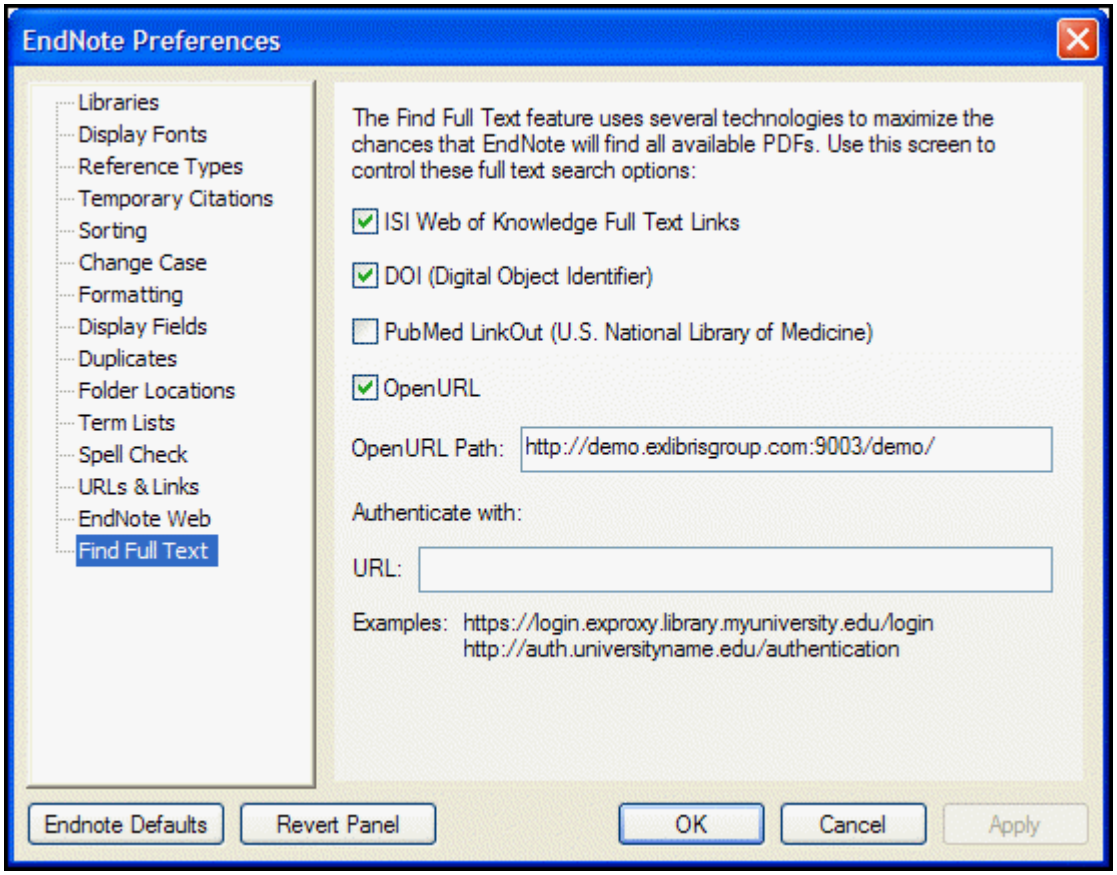
Method 2: Specify a custom folder path via transform

This method is for site system administrators, who want the end user to install or deploy the application without the user changing settings.

Change the value of the "INSTALLALLCONTENTFILES" property to "yes" in the Property table, save the transform, and create the group policy object to deploy the installer with the transform. (See the transform documentation for the tool you are using, such as Orca.)

Setting Local Find Full Text Preferences (Windows)

You can globally set the values for the Find Full Text panel under EndNote Preferences.



Just as we show under Changing the Default Content File Location and Installing All Content Files, you can do this via command line or by changing the setting via transform. These options are available:

FFTUSEISILINKS=	Use “T” or “F” to select or deselect the “Web of Knowledge Full Text Links” check box.
FFTUSEDOI=	Use “T” or “F” to select or deselect the DOI check box.
FFTUSEPUBMED=	Use “T” or “F” to select or deselect the “PubMed LinkOut” check box.
FFTUSEOPENURL=	Use “T” or “F” to select or deselect the “OpenURL” check box.
FFTOPENURLRESOLVER=	Enter a URL for the “OpenURL Path” text box.
FFTAUTHENTICATEURL=	Enter a URL for the “Authenticate with URL” text box.

Uninstalling EndNote

Uninstalling EndNote

Before you remove EndNote, back up your libraries and any other files you have created or customized.

If you used the Configure EndNote utility to register Word 2007 settings for additional users on a computer, please uninstall those files before uninstalling the program. Otherwise jump down to uninstalling the EndNote program.

To uninstall the EndNote program:

1. Log on to the computer as an administrator.
2. From the Windows *Start* menu, select *Control Panel,* or choose *Settings* and then *Control Panel.*
3. Select *Add or Remove Programs*.
4. In the list of currently installed programs, select *EndNote X4* .
5. Click the *Remove* button.

Next, remove any modified EndNote files that remain:

We purposely do not remove any EndNote libraries or customized files. You can manually delete these files with Windows Explorer. Once you are sure you do not want to save any of the files contained in the following folders, you can delete them:

Windows XP

C:\Program Files\EndNote X4

C:\Documents and Settings\All Users\Shared Documents\EndNote

C:\Documents and Settings\[UserName]\Application Data\EndNote

C:\Documents and Settings\[UserName]\My Documents\EndNote

Windows Vista

C:\Program Files\EndNote X4

C:\ Users\Public\Public Documents\EndNote

C:\ Users\[UserName]\ Documents\EndNote

C:\ Users\[UserName]\ App Data\Roaming\EndNote

Windows 7

C:\Program Files\EndNote X4

C:\ Users\Public\Public Documents\EndNote

C:\ Users\[UserName]\ Documents\EndNote

C:\ Users\[UserName]\ App Data\Roaming\EndNote

Making Backups

Backing Up Your EndNote Files

We strongly recommend that you keep several backup copies of your critical computer files, especially your EndNote libraries and papers that you are writing. There are many ways that a file can be damaged: CDs and hard disks can fail, viruses can erase or corrupt files, and, of course, there is always human error and the possibility of accidentally throwing away your thesis or grant proposal the day before it is due. If you have any kind of disaster, big or little, backup copies can save you hours or days of work.

The simplest way to make a backup is to use Windows Explorer or the Windows desktop to copy your files to a CD or other portable storage device. This will work for your EndNote libraries until they are too large to fit on one of these.

To backup larger files, or automate the backup process, use a backup program. Your operating system likely includes a backup program. There are also a number of commercial backup programs available that make regular backups easy and efficient; these programs can scan your disk for files that you designate as important, keep track of changes, and save you time by copying only the changed files. In addition, they can split large files, including EndNote libraries, among several disks. If you ever need those files, the backup program can "restore" them from the disks.

Important Files to Back Up

This topic lists the important EndNote files to backup. If you received the EndNote program electronically, you may want to start by backing up the EndNote installer.

EndNote libraries

The library file (filename.enl) is where all of your references are stored. Note that exporting data from your library is not a "backup." An export file is just a text document, whereas an EndNote library is a database. Make sure you back up both the file with the extension . ENL as well as the corresponding .DATA folder. The .DATA folder is considered part of the library; it includes figures, groups, and other files necessary for the library.

To easily save a copy of all of the required library files and folders, and save disk space, you can create a compressed filename.enlx file. The filename.enlx file includes the filename.enl library file as well as its associated .DATA folder and all of its contents.

Note: EndNote libraries larger than 4 gigabytes (GB) or 65,535 files (64 K) cannot be compressed with EndNote's *Compressed Library* command.

To save a compressed library file:

1. Open the library in EndNote.
2. From the *File* menu, select *Compressed Library (. enlx)* to display a Compressed Library dialog.
3. At the top left side of the dialog, select "Create."
4. At the top right of the dialog, select "With File Attachments."
5. In the bottom half of the dialog, select "All References in Library."
6. Click *Next* to display a file dialog.
7. Use the file dialog to save to an EndNote Compressed Library.

   Any of the following characters in the original library filename will be replaced with an underscore in the compressed library filename.

These characters are replaced with an underscore	
\	(back slash)
/	(forward slash)
:	(colon)
*	(asterisk)
?	(question mark)
"	(quotation mark)
<	(less than)
>	(greater than)
|	(vertical bar)

8. Back up the compressed filename.enlx file.

To restore a compressed library file:

1. Use EndNote (version X or later) to open the filename.enlx file, which will extract the . ENL file and the .DATA folder to the same folder where the . ENLX file is located.
2. Use EndNote to open the filename.enl file as you normally would to use the library.

Custom Reference Types

The current reference types table applies to all libraries opened under the current user account.

To back up custom reference types:

1. From the Edit menu, choose *Preferences*.
2. Click the Reference Types option in the list of preferences.
3. Under Reference Type Table, click *Export* to display a file dialog.
4. Name the file, select a folder where you will be able to find it later, and click *Save*. EndNote will append an . xml suffix to the file name.

To restore the reference type table:

1. From the Edit menu, choose Preferences.
2. Click the Reference Types option in the list of preferences.
3. Under Reference Type Table, click *Import*.
4. In the file dialog, locate, highlight, and *Open* the . xml file that was previously exported.

Modified Styles, Filters, and Connection Files

Modified styles are important to backup so that you do not have to recreate the bibliographic format if something happens to your customized style. Similarly, custom filters and connection files should be backed up so that you do not have to redo the work to get your references to import as you want them.

When you display a list of styles, filters, or connection files, the list is compiled from both the default installation folders as well as your personal folders.

The default Styles, Connections, and Filters folders are installed in the EndNote X4 program folder :

Program Files\EndNote X4 \Styles
Program Files\EndNote X4 \Filters
Program Files\EndNote X4 \Connections

If you have not modified these files, it is not important to make backups of them because you can always reinstall them with the EndNote Installer.

Once you make a change to one of these files, or create a new file, it is saved to your personal Styles, Filters, or Connections folder. These folders are typically found in :

Windows XP:
Documents and Settings\[Username]\My Documents\EndNote\

Windows Vista:
Users\[Username]\ Documents\EndNote

You can change the location of your personal folders with Folder preferences. To locate or change your personal Folder locations, see Folder Locations.

Word processing documents

The papers you have written that include EndNote citations should be kept with your EndNote backup files.

Backup Suggestions

Keep at least two sets of backup disks, each at a different location. We recommend that you have sets for alternate days, so if you discover that something went wrong yesterday, you will have the day-before-yesterday's version.

Make archival sets of the files listed above whenever you finish an important document. An archival set should include all of the files that are needed to recreate a final formatted paper. Label the backup disks, lock them and keep them in a safe place far away from your computer (preferably off-site). If you ever need to recreate the document, you will have all of the necessary files.

Troubleshooting

Troubleshooting EndNote

Troubleshooting EndNote

For documentation updates and correction notes for this release, refer to the Readme.txt file installed in the EndNote X4 program folder.

For late-breaking news and updates, please go to: http://www.endnote.com/support.

For a list of frequently asked questions, see: http://www.endnote.com/ faqs.

These are common issues:

Commands are dimmed and not available

Displaying extended/special characters

Opening an EndNote X4 library with EndNote 8 or 9

The EndNote library is corrupted

Cannot save a modified style, filter, or connection file

For topics that are specific to Cite While You Write:

Troubleshooting Cite While You Write

For topics that are specific to online connections:

Troubleshooting connections

Commands are Dimmed and Not Available

Menu items in EndNote may not be available depending on which mode is selected in the Library window:

> When you first create a library, Integrated Library & Online Search Mode is in effect. All groups and most menu commands are available.
>
> When Online Search Mode is in effect, the only groups available in the Library window are Online Searches, as well as the automatic groups “Online References” and “Online Trash.” You cannot save changes to individual references or make global edits in the library.
>
> Local Mode does not display Online Groups. It displays automatic groups, Custom groups, Smart groups, and EndNote Web groups. It keeps you from inadvertently downloading references found during an online search into your currently open library.

Use these icons on the toolbar to switch between modes:

For a full description of the three modes, see The Library Window Display Modes.

Commands may also be dimmed depending upon which part of the window is active. For example, if the Groups pane is active in the Library window, and no reference is selected in the reference list, the *Edit References* command will not be available from the *References* menu. It would not make sense in this context, since there is no reference selected.

Displaying Extended/Special Characters

Importing Unicode Characters

When you are copying text from the Web, or viewing an HTML document exported from EndNote, set encoding to Unicode (UTF-8). To do this in Internet Explorer, go to the *View* menu and choose *Encoding*.

If the encoding information in the import file is not recognized, no records will be imported into EndNote. If the encoding is recognized, but is incorrect for translation from the source program, Unicode characters will be corrupted during the Import operation.

See also Problems With Retrieved Data .

Displaying Unicode Characters in EndNote

EndNote uses Unicode to encode special characters, so that data can be easily translated between platforms, programs, and languages. If characters do not appear as they should in EndNote, you may need to change your display font. Some fonts do not include certain characters (you may see boxes rather than text).

From the *Edit* menu, choose *Preferences* and click the Display Fonts option. We recommend using a Unicode font as the display font, to display the majority of Unicode characters.

Changing Language Settings

You likely will need language packs installed in order to view Unicode double byte characters correctly in all instances. (This is a Windows requirement, not an EndNote requirement.)

EndNote uses the default language and locale settings from your operating system. While you may not need to install a language pack to view extended characters in a reference (because you have a font installed that can render the characters you need), there may be a time when you need to change your Windows Language setting.

To change the Locale/Language setting:

1. From the Start menu under Windows, choose one of these, depending on your system version:

   - *Settings>Control Panel>Regional and Language Options*>Languages tab
   - *Start>Control Panel>Regional Options*>General Tab

2. Use the tab to view or change the locale and/or languages and methods you can use to enter text. You may be asked for a CD that contains the language pack you requested. This is a CD available for your operating system, and is not provided with EndNote.

3. After changing the language setting, use the *Recover Library* command to rebuild existing EndNote libraries. See Recovering a Damaged Library.

Opening an EndNote X4 Library with EndNote 8 or 9

EndNote X4 can open EndNote 8 or 9 libraries with absolutely no problems. Technically, EndNote 8 and EndNote 9 can open libraries created with EndNote X4 , but we do not recommend it.

Because EndNote X4 includes enhancements, you may encounter one of the following situations, and possibly others, when opening an EndNote X4 library with EndNote 8 or 9.

When I attempt to open an EndNote X4 library, EndNote crashes

When you received your copy of the EndNote X4 library, it did not include the .DATA folder associated with it. The .DATA folder is a critical part of your library.

You must get another copy of the EndNote X4 library, including the .DATA folder associated with it.

When I open an EndNote X4 library, it appears to be blank

When you received your copy of the EndNote X4 library, it did not include the .DATA folder associated with it. The .DATA folder is a critical part of your library.

If you have not modified the blank library in any way (such as adding a new reference), you can simply copy the original .DATA folder to the folder containing the blank library (replacing the new .DATA folder created by EndNote 8 or 9). It should now open correctly. If the original DATA folder is not available, delete the .DATA folder that was created by EndNote 8 or 9, and you will be able to open the library with EndNote X4 (which will recreate the appropriate .DATA folder).

If you have modified the blank library, all previous reference information is lost. You must reload a copy of the original EndNote X4 library, including the .DATA folder.

The Korean sort order is lost

EndNote X and later included a Korean sort option; EndNote 8 or 9 will ignore the Korean sort option, and will default to the first item in the Sort list (System Default or English).

Saved groups are lost

EndNote X1 and later include the ability to save groups of records in a library; EndNote 8 or 9 will ignore groups.

Some references incorrectly use the Generic reference type

EndNote X and EndNote X2 included new reference types. EndNote 8 or 9 will display and print the Generic reference type for those references entered into the new reference types.

Existing File Links are not working

EndNote 8 and 9 do not support relative paths for attached files. When you use EndNote X4 to insert a file with a relative path, and then open that library with EndNote 8 or 9, you will see a file path that is not a functioning hyperlink.

Note: Do not modify the non-functioning relative link, or you will break the link.

If EndNote X4 users will be sharing libraries with EndNote 8 or 9 users, we recommend entering each file twice—once with a relative path (for EndNote X and later) and once with an absolute path (for EndNote 8 and 9).

1. First, use *File Attachments> Link to File* to link the file with a relative path. On the file dialog, make sure to select the check box titled "Copy this file to the default file attachments folder and create a relative link."
2. Use *File Attachments>Link to File* to link the file again, this time with an absolute path. On the file dialog, make sure to clear the check box titled "Copy this file to the default file attachments folder and create a relative link." Navigate to the existing file in the .Data/PDF subfolder for that reference and insert it.

This will create a relative link and an absolute link to the same document.

While you could insert files only as absolute links, you would lose the ability to easily and accurately transfer attached files to other colleagues using EndNote X4 . Absolute links require the same folder structure on each machine.

The EndNote Library is Corrupted

Any time you feel your library may be corrupted:

1. Back up the library. (Do not replace any previous backup copies, just in case you need them!)
2. From the Tools menu, run the *Recover Library* operation to rebuild the library. See Recovering a Damaged Library for more information about this command.

Note: Due to a bug in the Macintosh System, you may encounter database corruption when your EndNote library is stored on an SMB (Windows) server, you are accessing it from a Macintosh running OS 10.4.x, and you make changes that require reindexing data. If this should happen, copy the library to your local computer (or a Macintosh server) and run the *Recover Library* operation from the Tools menu in EndNote.

Cannot Save a Style, Filter, or Connection File (Windows)

You have edited a content file (a style, filter, or connection file), but when you try to save the file you cannot choose *Save*, but must choose *Save As* to save a copy.

The styles, filters, and connection files provided with EndNote are installed in the Styles, Filters, and Connections folders which are typically located in the EndNote program folder:

C:\Program Files\EndNote X4 \Styles
C:\Program Files\EndNote X4 \Filters
C:\Program Files\EndNote X4 \Connections

However, when you create a new file, or modify one of the installed files, the file is saved in one of your personal folders. By default, your personal folders are set to:

Windows XP:
C:\Documents and Settings\[UserName]\My Documents\EndNote\Styles
C:\Documents and Settings\[UserName]\My Documents\EndNote\Filters
C:\Documents and Settings\[UserName]\My Documents\EndNote\Connections

Windows Vista:
C:\ Users\[UserName]\ Documents\EndNote\Styles
C:\ Users\[UserName]\ Documents\EndNote\Filters
C:\ Users\[UserName]\ Documents\EndNote\Connections

Windows 7:
C:\ Users\[UserName]\ Documents\EndNote\Styles
C:\ Users\[UserName]\ Documents\EndNote\Filters
C:\ Users\[UserName]\ Documents\EndNote\Connections

When you display a list of files in EndNote, the list is compiled from both folder locations: the installation folders found in the EndNote program folder, plus your personal folders. For more information about these folder locations, and how to change them, see Folder Locations Preferences.

If you want to make a modified file available to all users, you must log in as an administrator to copy the file to the program folder location.

To make a file available to all users:

1. Edit the file as needed and save a copy to your personal folder.
2. Log off as the current user.

3. Log in again with administrative rights.
4. Copy the modified file from your personal folder to the appropriate shared folder in the EndNote X4 program folder.

Troubleshooting Cite While You Write

Troubleshooting Cite While You Write

For a more extensive list of issues and updates concerning Cite While You Write, please go to: http://www.endnote.com/support.

For a list of frequently asked questions, see: http://www.endnote.com/ faqs.

These are common CWYW issues:

No EndNote Commands in Word

Two EndNote toolbars appear in Word

Word crashes or gives an error when inserting a large number of citations

Garbled ADDIN EN.Cite code is appearing rather than citations

Corrupted Word documents

Inserted citations disappear, but reference list is created

No EndNote commands in Word

When this manual was written, EndNote commands were available in Microsoft Word 2003 and 2007 and OpenOffice.org Writer 3. In Word 2003, EndNote commands appear on the *Tools* menu in an *EndNote X4* submenu. In Word 2007, EndNote commands appear on an EndNote X4 tab. In Writer, EndNote commands appear on an *EndNote X4* menu.

Before you attempt to Repair or Modify your EndNote installation in order to use Cite While You Write, you must make sure that your word processor is not running. Close all Microsoft Office and OpenOffice.org applications. For OpenOffice.org, you must also close the OpenOffice.org Quickstarter that may appear in your System Tray. Right click on the icon and *Exit Quickstarter*.

Repairing the Installation

If you upgraded your version of Microsoft Word or OpenOffice.org Writer *after* installing EndNote, or Cite While You Write commands do not appear in Word or Writer for some other reason, you should run the installation program again.

Run the EndNote installer file to Repair the installation:

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. Run the EndNote installer file from disk or CD.
3. Select *Repair* and click *Next*.

Or, run the EndNote installer from the Control Panel to Repair the installation:

1. Log in to the machine with administrative rights or as a user with program installation privileges.

2. From the Windows *Start* menu, select *Control Panel*, or choose *Settings* and then *Control Panel.*
3. Choose *Add or Remove Programs*.
4. Highlight *EndNote X4* and click *Change*.
5. Select *Repair* and click *Next*.

Your entire EndNote installation is checked and repaired as needed.

Modifying the Installation

If you initially did a Custom install, and did not install Cite While You Write files, you need to modify your installation to install the appropriate files.

Run the EndNote installer file to Modify the installation:

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. Run the EndNote installer file from disk or CD.
3. Select *Modify* and click *Next*.
4. Make sure that the appropriate item is selected for your word processor:

   For Microsoft Word, under Word Templates/Add-in, select “Cite While You Write for Microsoft Word” for installation.

   For OpenOffice.org Writer, select OpenOffice.org Extension for installation.

5. Click *Next*.

Or, run the EndNote installer from the Control Panel to Modify the installation:

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. From the Windows *Start* menu, select *Control Panel*, or choose *Settings* and then *Control Panel.*
3. Choose *Add or Remove Programs*.
4. Highlight *EndNote X4* and click *Change*.
5. Select *Modify* and click *Next*.
6. Make sure that the appropriate item is selected for your word processor:

   For Microsoft Word, under Word Templates/Add-in, select “Cite While You Write for Microsoft Word” for installation.

   For OpenOffice.org Writer, select OpenOffice.org Extension for installation.

7. Click Next.

When word processor support is correctly installed, you will see EndNote commands on the *Tools>EndNote X4* submenu in Word 2003, on an EndNote X4 tab in Word 2007, or on an *EndNote X4* menu in OpenOffice.org Writer.

Adding the EndNote Extension to OpenOffice.org Writer

It is possible that the appropriate Cite While You Write files were installed for OpenOffice.org Writer, but the extension was not appropriately loaded into Writer.

To load the EndNote extension in OpenOffice.org Writer:

1. In OpenOffice.org Writer, go to the Tools menu and choose *Extension Manager*.
2. Click *Add*.

3. In the file dialog, navigate to the folder
   Program Files\Common Files\ResearchSoft\CWYW\13,
   select the file EndNote.oxt, and click *Open*.

   The EndNote Cite While You Write extension will now appear in the list.

4. Click *Close*.

5. Exit OpenOffice.org Writer and then restart it to load the new EndNote Cite While You Write extension.

EndNote commands should appear on an *EndNote X4* menu.

Two EndNote Toolbars appear in Word (Windows)

When you have an earlier version of EndNote installed, and later install EndNote X4 , there may be situations where the previous version's Cite While You Write files are not removed. You may see two EndNote toolbars in Microsoft Word, and you may see two *EndNote* submenus on the Tools menu in Word.

To completely remove the old Cite While You Write add-in:

1. Locate the Word Startup folder.

   See your Microsoft Word documentation about how to view and manage add-ins; you will be able to see which add-ins are loaded and where they are located.

2. Quit from Word.

3. Delete *all* of the CWYW files found in the Startup folder, such as these files for EndNote X:

   EN10Cwyw.dot
   EN10Cwyw.wll
   EN10Cwyw.WordXP.wll

   Earlier versions of EndNote will show similar files, with a slightly different prefix.

Note: The Startup folder for Word is hidden by default. You likely will need to either enter the full path to the folder, or turn on "Show hidden files and folders" in Windows Explorer.

4. Restart Word.

Word crashes or gives an error when inserting a large number of citations

EndNote uses Word's hidden field codes when formatting citations, and inserts all the reference information for all of the grouped citations in these codes. However, there is a limit to the amount of text that Microsoft allows in a single set of field codes. You may reach the maximum limit when you attempt to insert 20 or more citations for references that have extensive information in them (such as large abstracts).

To avoid this issue, try not to insert a large group of citations all at once. Instead, insert a small group of references, then a space, and then insert another small group of references. This avoids having a single group of formatted citations that would exceed Word's field code limitations.

When you use *Insert Selected Citations*, or highlight multiple citations to insert from the Find Citations dialog, EndNote limits you to 250 citations in a single group.

Garbled ADDIN EN.CITE code is appearing in Word rather than citations

When you insert a citation into a Word document, the citation is embedded in field codes, such as:

Field codes hold reference information for your formatted citations, and are typically hidden.

To hide field codes in Word:

Word 2003:

1. In Word, go to the Tools menu and select *Options*.
2. On the View tab, clear the box titled "Field Codes."
3. Click *OK*.

Word 2007:

1. In Word, click the Microsoft Office button in the top left corner.
2. Click the *Word Options* button.
3. Click *Advanced*.
4. Scroll to the "Show document content" section and clear the box titled "Show field codes instead of their values."
5. Click *OK*.

Note: An easy way to turn field codes on or off is to press Alt+F9.

Your citations will now appear correct in the document. Field codes are still there, and are necessary, but they are hidden from view.

Corrupted Word Documents

The *Unformat Citations* command may help you restore a corrupted Word document. It can also be helpful to use Unformat Citations to avoid corruption in the first place.

Problems can occur when you have many citations in your Word document, and you either move many citations around in the document, or make many edits to references in the associated EndNote library. If you Unformat Citations before you begin making edits, you can avoid possible issues.

To restore a corrupted Word document (Word 2003) :

1. Before you begin, please back up your Word document and the associated EndNote library. (Do not replace a previous backup.)
2. In Word, open a new Blank Document.
3. Go to the Insert menu, and choose *File*.
4. Insert the problematic Word document into this new blank document.
5. From the Tools>EndNote menu, choose *Format Bibliography*.
   If the document is still not formatting correctly, continue to the next step.

Note: The next step removes the traveling library from this document, so make sure you have the library available that contains these references.

6. From the Tools>EndNote menu, choose *Unformat Citations* to convert the citations into the temporary format and remove the reference list from the end of the document.
7. Quit from Word (and Outlook if it is open).
8. Start Word again, and open just the unformatted document. If you need to move large sections of the document around, or delete citations, do it at this point.
9. Open EndNote and the associated library.
10. In Word, go to the Tools>EndNote menu and choose *Format Bibliography* again.

Inserted citations disappear, but reference list is created

Most likely, you are formatting with an output style that doesn't include a citation definition, such as the "Show All Fields" output style or the "Chicago 15th A" output style. To fix this, simply format the bibliography with a different output style.

To reformat with a different output style:

1. **Word 2003** : In Word, go to Tools > EndNote menu and select *Format Bibliography*.

   Word 2007 : On the EndNote tab, in the Bibliography group, click the bottom corner arrow.)

   OpenOffice.org Writer : In Writer, go to the EndNote menu and select *Format Bibliography* .
2. In the dropdown output style list, select the output style you'd like to use. A generic output style you can use for this purpose is the "Author-Date" style. You can click the *Browse* button to choose from other available output styles.
3. Click *OK* to format the document using the selected style.

If you are using an author/year type of output style, and the reference you are citing does not include an author or a year, there will be nothing to display in the citation. The citation will simply not show up, although the full form will appear in the reference list at the end of the document.

Troubleshooting Online Connections

Troubleshooting Connections

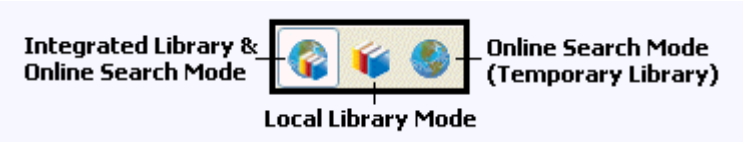
When connecting with an online database, there are at least two computers involved in completing the tasks you wish to perform: yours and the database server. Most often, there are intermediary computers as well, such as Domain Name Servers (DNS), proxy servers, and firewalls. With more than just your computer involved, things can get complicated.

The most basic problem you can encounter with connections is the failure to connect at all. There are four ways you may experience this problem:

EndNote cannot connect to the Internet
EndNote cannot find the host
EndNote cannot connect to the host
EndNote cannot communicate with the host

Online Search Groups are Not Available

If your EndNote library is displayed in Local Library Mode, Online Search groups are suppressed. Display modes are selected by using icons on the toolbar:



When you first create a library, Integrated Library & Online Search Mode is in effect. All groups and most menu commands are available, including Online Search groups. If you execute an online search while in Integrated Library & Online Search Mode, the retrieved references are saved directly to your open library.

When Online Search Mode is in effect, the only groups available in the Library window are Online Search groups, as well as the automatic groups “Online References” and “Online Trash.” If you execute an online search while in Online Search Mode, retrieved references are downloaded into a temporary library, and you must use the *References>Copy References* command to copy selected references to a permanent EndNote library.

Local Library Mode does not display Online Search groups. It displays automatic groups, Custom groups, Smart groups, and EndNote Web groups. It keeps you from inadvertently downloading references found during an online search into your currently open library. You can still choose *Online Search* from the Tools menu, which would switch your display to Online Search Mode. Or, use the toolbar to select either Integrated Library & Online Search Mode or Online Search Mode so that the Online Search groups become available.

Problems Connecting to the Internet

In general, if you are able to use a Web browser or other Internet software, you should also be able to connect with EndNote. Try using your Web browser to make sure your Internet connection is working.

Dial-up Connections

Your computer system includes software to connect to the Internet through a modem connected to your telephone line. You need to set up the Windows dialup connections software in order to connect with your Internet provider.

In most cases, trying to connect in EndNote will start up your dialup software automatically. Some networking packages require that you establish the dialup connection manually before trying to connect in EndNote.

Problems Finding the Host

There are a few possibilities for what could be wrong if EndNote cannot find the host:

- The domain name specified in the connection file is wrong.
- Your network software does not have the correct address for the Domain Name Server.
- Your Domain Name Server is not working.

If the connection file has worked in the past, the problem may lie with the Domain Name Server. If you have just made the connection file yourself and it's never worked before, you probably entered the wrong Server Address.

If you suspect problems with the Domain Name Server, contact your network administrator.

Problems Connecting

Once the host is found, EndNote tries to connect. It sends a connection request to the host and waits for up to two minutes for a reply. It may receive none, or it may receive a refusal immediately. In the first case you will see a time-out error message, and in the second case you will see a "host refused connection" error message.

If you wait for two minutes and receive a time-out message, the online computer is down for some reason. Try again later.

If you receive a refusal message, and this happens no matter which connection file you try to use, you are most likely behind a firewall.

Firewalls and Proxy Servers

Firewalls

Your system may be configured with a firewall to block certain ports. To connect to a database from behind a firewall, you must ask your network administrator to allow communication through the firewall for the port used by the online database you wish to search. You can open the connection file to find the appropriate server address and port number, as described below.

Depending upon the configuration of the firewall, the administrator may allow communication to all computers outside the firewall on the requested port, or communication to a specific server and port.

Proxy Servers

Your organization, or the online database provider, may use a proxy server to allow only valid users access to the organization's network and/or database. Contact a network administrator from the organization to find out whether a proxy server is used.

If you already have access to the remote network with your Web browser, check the configuration of your Web browser. Look for "proxies" or "proxy server." (See your Web Browser documentation to locate proxy server settings, as the location changes depending on which version you are using.) The configuration for a proxy server has two pieces of information: an address and a port.

Note: If Internet Explorer is configured for use with a proxy server, EndNote will automatically handle the proxy server when accessing http-based connections (PubMed and Web of Science). If you do not use Internet Explorer, configure proxy settings with the Internet Options in the Windows Control Panel.

Finding the Server Address and Port

Before you contact your network administrator, check the appropriate EndNote connection file for the address of the server and the port specified.

To obtain the server address and port:

1. From the Edit menu, choose *Connection Files* and select *Open Connection Manager*.
2. Select the appropriate connection file and click *Edit*.

3. In the Connection File window, click on the *Connection Settings* option.

You will find the server address and the port on the *Connection Settings* panel.

Depending upon the configuration of the firewall, the administrator may allow communication to all computers outside the firewall on the requested port, or communication to a specific server and port.

Communicating with Local Database Servers or Gateways

Many universities and organizations license Z39.50 databases for use on their own servers, or for access from a local gateway. The company providing the databases will include client software for accessing the databases. Some Z39.50 servers are designed to respond only to requests from this client software. In other cases, the server must be configured to allow requests from software other than the supplied client program.

If your organization maintains Z39.50 databases, but you are unable to connect to them with EndNote, ask your network administrator if the database server supports client software other than that supplied by the database provider.

Problems Communicating with the Host

Once you are connected, the most common problem in communicating with a host server is a password problem. Check your password and user ID. Check the upper or lower case requirements. If a password is rejected, you will see an error message that says something like "Server has rejected initialization." See Access- Restricted Databases.

The Connection Error Dialog

When searching an online database, if there is a problem with the database, the search terms, or the connection file, EndNote presents an error message describing the source of the problem. The connection error dialog displays the original Z39.50 error message, if available, EndNote's translated version of that error, and any other message being sent directly from the server.

Errors Encountered While Retrieving References

For various reasons, some references cause errors during retrieval. If EndNote encounters an error while retrieving references from an online source, it stops the retrieval process. In order to get the rest of the references, it is best to submit the search again, and this time request the references start downloading with the one after the reference which might have caused an error. For example, if the error appeared while the tenth reference out of fifty was being retrieved, submit the search again, and when prompted, ask only for references 11 through 50 to be retrieved.

EndNote typically retrieves references in batches, for speed and memory reasons. However, some servers are too slow, or their record data is too large, to support batch downloads. If you find that your connection with a service provider fails after approximately the same amount of data each time you attempt to download references, you can try turning off batch processing. You will need to open the connection file you are using, as described under Editing a Connection File, and deselect the *Batch Download* option described under The Connection Settings.

Problems With Retrieved Data

Blank records

If blank records appear in your reference list, it could be due to a number of causes. One thing to check is whether your filter settings in the connection file match the format of the retrieved records. Open the connection file and view the *Templates* section. Also show the Connection status window, and change its view to show *Record Data*. The two formats need to match in order for the data to import.

Sometimes, when viewing the record data in the Connection Status window, you will notice that there is no bibliographic information for a reference that was retrieved. This happens sometimes where duplicate or blank entries remain in the online database. These can be ignored.

Asterisks in author names or titles

For some databases, diacritical characters in the author names and titles cannot be interpreted correctly when EndNote retrieves the references. In such cases, the diacritical characters are replaced with an asterisk (*). Use the Change Text command in the References menu to change the names with the asterisks to the name with the diacritical characters as they should be.

In exported references, extended characters appear as boxes

You've downloaded references from an online source, and they display correctly in EndNote. But when you export those references to a text file, and open the file with a text reader such as NotePad, all extended characters (for example, umlauts) appear to be corrupted. What happened?

Your online data source likely provided each extended character as two characters – a base letter and a combining character – rather than as a single, precomposed character. For example, an extended character can be composed of an "a" and then the combining umlaut character " ¨" rather than as a single character "ä".

Both character representations are perfectly valid, so initially there is no indication of a problem. Many applications, including EndNote and WordPad, can appropriately display extended characters in either form, but you happen to be using an application that cannot.

Windows applications display a box character to indicate that the font or application cannot render the appropriate character.

Even though the characters do not display correctly in the current application, they are still valid. Open the file with a different application.

See also Displaying Extended/Special Characters .

Reference Types and Fields

About the Predefined Reference Types

The reference type table shows which fields are used in each of the 48 different reference types and what the fields are called. The Generic reference type is repeated several times so that you can easily compare an individual field to its Generic field name. For descriptions of special fields, see Special Fields.

Important Points About Reference Types

- You can assign a particular reference type to each reference entered into your library.
- The Reference Types preference, accessible through EndNote's Preferences, determines which fields are available for each of the different reference types.
- The Reference Types preference allows up to 48 different types of references, each capable of supporting up to 54 fields.
- Of the 48 reference types, all but the Generic type can be modified.
- Use the Reference Types preference to add, delete, or rename fields.
- The layout of the Generic reference type should be used as a guide when modifying or creating reference types. Rows reserved for Authors should be used only for names.
- The Date Stamp fields, "Added to Library" and "Record Last Updated," are automatic fields that cannot be altered. They appear in the footer of each reference.
- Changes made to the Reference Types preference are stored for each user in a RefTypeTable.xml file which is located in the folder Documents and Settings\[Your Folder]\Application Data\EndNote. They apply to all libraries opened under the current user account.
- If you move your library to a different computer, your references will follow the layout of the Reference Types preference for the current user account on that computer, unless you also transfer a copy of your RefTypeTable.xml file to the other user's Documents and Settings\[Your Folder]\Application Data\EndNote folder. See Sharing Your Reference Type Table.
- Do not enter reference data into the Reference Types preference dialog. The table is designed to store just the names of the reference fields.

See the List of Reference Types.

List of Reference Types

These are the reference types that are supplied with EndNote. Click on a reference type name to view the list of fields included in that reference type. Each listing includes the Generic reference type, so that you can view default field names. Default field names may appear in various areas of the program, such as in the Search window, or when editing an output style.

Aggregated Database	Generic
Ancient Text	Government Document
Artwork	Grant
Audiovisual Material	Hearing
Bill	Journal Article

Blog	Legal Rule or Regulation
Book	Magazine Article
Book Section	Manuscript
Case	Map
Catalog	Newspaper Article
Chart or Table	Online Database
Classical Work	Online Multimedia
Computer Program	Pamphlet
Conference Paper	Patent
Conference Proceedings	Personal Communication
Dataset	Report
Dictionary	Serial
Edited Book	Standard
Electronic Article	Statute
Electronic Book	Thesis
Electronic Book Section	Unpublished Work
Encyclopedia	Web Page
Equation	Unused 1
Figure	Unused 2
Film or Broadcast	Unused 3

Reference Types

Reference Types, A-An

Next

1	Generic	Aggregated Database	Ancient Text
2	Author	Author	Author
3	Year	Year	Year
4	Title	Title	Title
5	Secondary Author		Editor
6	Secondary Title	Periodical	Publication Title
7	Place Published	City	City
8	Publisher	Publisher	Publisher
9	Volume	Volume	Volume
10	Number of Volumes		Number of Volumes
11	Number	Publication Number	Text Number
12	Pages	Pages	Pages
13	Section	Screens	
14	Tertiary Author		
15	Tertiary Title		Volume Title
16	Edition	Date Published	Edition

17	Date	Date Accessed	Date
18	Type of Work	Type of Work	Type of Work
19	Subsidiary Author		Translator
20	Short Title	Short Title	Short Title
21	Alternate Title	Alternate Title	Abbreviated Publication
22	ISBN/ISSN	ISBN/ISSN	ISBN
23	DOI	DOI	DOI
24	Original Publication	Original Publication	Original Publication
25	Reprint Edition		Reprint Edition
26	Reviewed Item		Reviewed Item
27	Custom 1		
28	Custom 2		
29	Custom 3		
30	Custom 4		
31	Custom 5		
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number		Call Number
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date		Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, Art-Au

Prev Next

1	**Generic**	**Artwork**	**Audiovisual Material**
2	Author	Artist	Author
3	Year	Year	Year
4	Title	Title	Title
5	Secondary Author		Series Editor
6	Secondary Title		Series Title
7	Place Published	City	City
8	Publisher	Publisher	Publisher
9	Volume		Volume
10	Number of Volumes		Extent of Work
11	Number	Size	Number

12	Pages	Description	
13	Section		
14	Tertiary Author		
15	Tertiary Title		
16	Edition		Edition
17	Date	Date	Date
18	Type of Work	Type of Work	Type
19	Subsidiary Author		Performers
20	Short Title	Short Title	Short Title
21	Alternate Title	Alternate Title	Alternate Title
22	ISBN/ISSN		ISBN
23	DOI	DOI	DOI
24	Original Publication		Contents
25	Reprint Edition		
26	Reviewed Item		
27	Custom 1		Cast
28	Custom 2		Credits
29	Custom 3	Size/Length	Size/Length
30	Custom 4		
31	Custom 5		Format
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	Call Number
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, Bill-Blog

Prev Next

1	**Generic**	**Bill**	**Blog**
2	Author		Author
3	Year	Year	Year
4	Title	Title	Title of Entry
5	Secondary Author		Editor
6	Secondary Title	Code	Title of WebLog

7	Place Published		City
8	Publisher		Publisher
9	Volume	Code Volume	Access Year
10	Number of Volumes		
11	Number	Bill Number	Date
12	Pages	Code Pages	Description
13	Section	Code Section	Message Number
14	Tertiary Author		Illustrator
15	Tertiary Title	Legislative Body	Institution
16	Edition	Session	Edition
17	Date	Date	Last Update Date
18	Type of Work		Type of Medium
19	Subsidiary Author	Sponsor	
20	Short Title	Short Title	Short Title
21	Alternate Title		Alternate Title
22	ISBN/ISSN		ISBN
23	DOI	DOI	DOI
24	Original Publication	History	Contents
25	Reprint Edition		
26	Reviewed Item		
27	Custom 1		Author Affiliation
28	Custom 2		
29	Custom 3		
30	Custom 4		
31	Custom 5		
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	Call Number
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

Prev Next

Reference Types, Book

Prev Next

1	**Generic**	**Book**	**Book Section**

2	Author	Author	Author
3	Year	Year	Year
4	Title	Title	Title
5	Secondary Author	Series Editor	Editor
6	Secondary Title	Series Title	Book Title
7	Place Published	City	City
8	Publisher	Publisher	Publisher
9	Volume	Volume	Volume
10	Number of Volumes	Number of Volumes	Number of Volumes
11	Number	Series Volume	Series Volume
12	Pages	Number of Pages	Pages
13	Section	Pages	Chapter
14	Tertiary Author		Series Editor
15	Tertiary Title		Series Title
16	Edition	Edition	Edition
17	Date	Date	
18	Type of Work	Type of Work	
19	Subsidiary Author	Translator	Translator
20	Short Title	Short Title	Short Title
21	Alternate Title	Abbreviation	Abbreviation
22	ISBN/ISSN	ISBN	ISBN
23	DOI	DOI	DOI
24	Original Publication	Original Publication	Original Publication
25	Reprint Edition	Reprint Edition	Reprint Edition
26	Reviewed Item		Reviewed Item
27	Custom 1		Section
28	Custom 2		
29	Custom 3		
30	Custom 4		
31	Custom 5		Packaging Method
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	Call Number
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, Case-Cat

Prev Next

1	Generic	Case	Catalog
2	Author		Author
3	Year	Year Decided	Year
4	Title	Case Name	Title
5	Secondary Author		Institution
6	Secondary Title	Reporter	Series Title
7	Place Published		City
8	Publisher	Court	Publisher
9	Volume	Reporter Volume	Volume
10	Number of Volumes	Reporter Abbreviation	Catalog Number
11	Number	Docket Number	Series Volume
12	Pages	First Page	Pages
13	Section		Number of Pages
14	Tertiary Author	Higher Court	
15	Tertiary Title	Decision	
16	Edition	Action of Higher Court	Edition
17	Date	Date Decided	Date
18	Type of Work	Citation of Reversal	Type of Work
19	Subsidiary Author	Counsel	Translator
20	Short Title	Abbreviated Case Name	Short Title
21	Alternate Title	Parallel Citation	Abbreviation
22	ISBN/ISSN		ISBN
23	DOI	DOI	DOI
24	Original Publication	History	Original Publication
25	Reprint Edition		Reprint Edition
26	Reviewed Item		
27	Custom 1		
28	Custom 2		
29	Custom 3		
30	Custom 4		
31	Custom 5		Packaging Method
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	Call Number
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library

54	Last Updated	Last Updated	Last Updated

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Reference Types, Chart-CI

Prev Next

1	**Generic**	**Chart or Table**	**Classical Work**
2	Author	Created By	Attribution
3	Year	Year	Year
4	Title	Title	Title
5	Secondary Author	Name of File	Series Editor
6	Secondary Title	Image Source Program	Series Title
7	Place Published	City	City
8	Publisher	Publisher	Publisher
9	Volume	Image Size	Volume
10	Number of Volumes		Number of Volumes
11	Number	Number	Series Volume
12	Pages	Description	Number of Pages
13	Section		
14	Tertiary Author		
15	Tertiary Title		
16	Edition	Version	Edition
17	Date	Date	
18	Type of Work	Type of Image	Type
19	Subsidiary Author		Translator
20	Short Title		Short Title
21	Alternate Title		Alternate Title
22	ISBN/ISSN		ISSN/ISBN
23	DOI	DOI	DOI
24	Original Publication		Original Publication
25	Reprint Edition		Reprint Edition
26	Reviewed Item		
27	Custom 1		
28	Custom 2		
29	Custom 3		
30	Custom 4		
31	Custom 5		
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	Call Number
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author

49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

Prev Next

Reference Types, Com-Con

Prev Next

1	**Generic**	**Computer Program**	**Conference Paper**
2	Author	Programmer	Author
3	Year	Year	Year
4	Title	Title	Title
5	Secondary Author	Series Editor	Editor
6	Secondary Title	Series Title	Conference Name
7	Place Published	City	Conference Location
8	Publisher	Publisher	Publisher
9	Volume		Volume
10	Number of Volumes		
11	Number		Issue
12	Pages	Description	Pages
13	Section		
14	Tertiary Author		
15	Tertiary Title		
16	Edition	Version	
17	Date		Date
18	Type of Work	Type	Type
19	Subsidiary Author		
20	Short Title	Short Title	
21	Alternate Title	Alternate Title	
22	ISBN/ISSN	ISBN	
23	DOI	DOI	DOI
24	Original Publication	Contents	
25	Reprint Edition		
26	Reviewed Item		
27	Custom 1	Computer	Place Published
28	Custom 2		
29	Custom 3		
30	Custom 4		
31	Custom 5		
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address

44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, Con-D

Prev Next

1	**Generic**	**Conference Proceedings**	**Dataset**	**Dictionary**
2	Author	Author	Investigators	Author
3	Year	Year of Conference	Year	Year
4	Title	Title	Title	Title
5	Secondary Author	Editor	Producer	Editor
6	Secondary Title	Conference Name		Dictionary Title
7	Place Published	Conference Location	City	City
8	Publisher	Publisher	Distributor	Publisher
9	Volume	Volume		Volume
10	Number of Volumes	Number of Volumes	Study Number	Number of Volumes
11	Number			Number
12	Pages	Pages		Pages
13	Section		Original Release Date	
14	Tertiary Author	Series Editor		
15	Tertiary Title	Series Title	Series Title	
16	Edition	Edition	Version	Edition
17	Date	Date	Date of Collection	
18	Type of Work			
19	Subsidiary Author	Sponsor	Funding Agency	Translator
20	Short Title	Short Title	Short Title	Short Title
21	Alternate Title		Abbreviation	Abbreviation
22	ISBN/ISSN	ISBN	ISSN	ISBN
23	DOI	DOI	DOI	DOI
24	Original Publication	Source	Version History	Original Publication
25	Reprint Edition			Reprint Edition
26	Reviewed Item		Geographic Coverage	Reviewed Item
27	Custom 1	Place Published	Time Period	
28	Custom 2	Year Published	Unit of Observation	
29	Custom 3		Data Type	
30	Custom 4		Dataset(s)	
31	Custom 5	Packaging Method		
32	Custom 6			
33	Custom 7			
34	Accession Number	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	Call Number	Call Number
36	Label	Label	Label	Label

37	Keywords	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract	Abstract
39	Notes	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes	Research Notes
41	URL	URL	URL	URL
42	File Attachments	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address	Author Address
44	Figure	Figure	Figure	Figure
45	Caption	Caption	Caption	Caption
46	Access Date	Access Date	Access Date	Access Date
47	Custom 8			
48	Translated Author	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider	Database Provider
52	Language	Language	Language	Language
53	Added to Library	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated	Last Updated

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Reference Types, Ed-El

Prev Next

1	**Generic**	**Edited Book**	**Electronic Article**
2	Author	Editor	Author
3	Year	Year	Year
4	Title	Title	Title
5	Secondary Author	Series Editor	
6	Secondary Title	Series Title	Periodical Title
7	Place Published	City	City
8	Publisher	Publisher	Publisher
9	Volume	Volume	Volume
10	Number of Volumes	Number of Volumes	Document Number
11	Number	Series Volume	Issue
12	Pages	Number of Pages	Pages
13	Section		E-Pub Date
14	Tertiary Author		
15	Tertiary Title		Website Title
16	Edition	Edition	Edition
17	Date	Date	Date Accessed
18	Type of Work	Type of Work	Type of Work
19	Subsidiary Author	Translator	
20	Short Title	Short Title	
21	Alternate Title	Alternate Title	Alternate Title
22	ISBN/ISSN	ISBN	ISBN
23	DOI	DOI	DOI
24	Original Publication	Original Publication	
25	Reprint Edition	Reprint Edition	
26	Reviewed Item		Reviewed Item
27	Custom 1		Year Cited
28	Custom 2		Date Cited
29	Custom 3		PMCID
30	Custom 4		

31	Custom 5		
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Editor Address	Editor Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, El-En

Prev Next

1	**Generic**	**Electronic Book**	**Electronic Book Section**	**Encyclopedia**
2	Author	Author	Author	Author
3	Year	Year	Year	Year
4	Title	Title	Title	Title
5	Secondary Author	Editor	Editor	Editor
6	Secondary Title	Secondary Title	City	Encyclopedia Title
7	Place Published	City	City	City
8	Publisher	Publisher	Publisher	Publisher
9	Volume	Volume	Volume	Volume
10	Number of Volumes	Version	Number of Volumes	Number of Volumes
11	Number		Chapter	
12	Pages	Number of Screens	Pages	Pages
13	Section			
14	Tertiary Author	Series Editor	Series Editor	
15	Tertiary Title	Series Title	Series Title	
16	Edition	Edition	Edition	Edition
17	Date	Date Accessed	Date	Date
18	Type of Work	Type of Medium	Type of Work	
19	Subsidiary Author		Translator	Translator
20	Short Title		Short Title	Short Title
21	Alternate Title			Abbreviation
22	ISBN/ISSN	ISSN	ISBN	ISBN
23	DOI	DOI	DOI	DOI
24	Original Publication		Original Publication	Original Publication

25	Reprint Edition		Reprint Edition	Reprint Edition
26	Reviewed Item		Reviewed Item	Reviewed Item
27	Custom 1	Year Cited		
28	Custom 2	Date Cited		
29	Custom 3			
30	Custom 4			
31	Custom 5		Packaging Method	
32	Custom 6			
33	Custom 7			
34	Accession Number	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	Call Number	Call Number
36	Label	Label	Label	Label
37	Keywords	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract	Abstract
39	Notes	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes	Research Notes
41	URL	URL	URL	URL
42	File Attachments	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address	Author Address
44	Figure	Figure	Figure	Figure
45	Caption	Caption	Caption	Caption
46	Access Date			Access Date
47	Custom 8		Accessed Date	
48	Translated Author	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider	Database Provider
52	Language	Language	Language	Language
53	Added to Library	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated	Last Updated

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Reference Types, Eq-Fig

Prev Next

1	**Generic**	**Equation**	**Figure**
2	Author	Created By	Created By
3	Year	Year	Year
4	Title	Title	Title
5	Secondary Author	Name of File	Name of File
6	Secondary Title	Image Source Program	Image Source Program
7	Place Published	City	City
8	Publisher	Publisher	Publisher
9	Volume	Image Size	Image Size
10	Number of Volumes		
11	Number	Number	Number
12	Pages	Description	Description
13	Section		

14	Tertiary Author		
15	Tertiary Title		
16	Edition	Version	Version
17	Date	Date	Date
18	Type of Work	Type of Image	Type of Image
19	Subsidiary Author		
20	Short Title		
21	Alternate Title		
22	ISBN/ISSN		
23	DOI	DOI	DOI
24	Original Publication		
25	Reprint Edition		
26	Reviewed Item		
27	Custom 1		
28	Custom 2		
29	Custom 3		
30	Custom 4		
31	Custom 5		
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	Call Number
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, Film-Gov

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1	**Generic**	**Film or Broadcast**	**Government Document**
2	Author	Director	Author
3	Year	Year Released	Year
4	Title	Title	Title
5	Secondary Author	Series Director	Department
6	Secondary Title	Series Title	
7	Place Published	Country	City
8	Publisher	Distributor	Publisher

9	Volume		Volume
10	Number of Volumes		
11	Number		Issue
12	Pages	Running Time	Pages
13	Section		Section
14	Tertiary Author	Producer	
15	Tertiary Title	Series Title	Series Title
16	Edition	Edition	Edition
17	Date	Date Released	
18	Type of Work	Medium	
19	Subsidiary Author	Performers	
20	Short Title	Short Title	
21	Alternate Title	Alternate Title	
22	ISBN/ISSN		Report Number
23	DOI	DOI	DOI
24	Original Publication		
25	Reprint Edition		
26	Reviewed Item		
27	Custom 1	Cast	Government Body
28	Custom 2	Credits	Congress Number
29	Custom 3		Congress Session
30	Custom 4	Genre	
31	Custom 5	Format	
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Synopsis
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, Grant-H

Prev Next

1	**Generic**	**Grant**	**Hearing**
2	Author	Investigators	

3	Year	Year	Year
4	Title	Title of Grant	Title
5	Secondary Author		
6	Secondary Title		Committee
7	Place Published	Activity Location	City
8	Publisher	Sponsoring Agency	Publisher
9	Volume	Amount Requested	
10	Number of Volumes	Amount Received	Number of Volumes
11	Number	Status	Document Number
12	Pages	Pages	Pages
13	Section	Duration of Grant	
14	Tertiary Author		
15	Tertiary Title		Legislative Body
16	Edition	Requirements	Session
17	Date	Deadline	Date
18	Type of Work	Funding Type	
19	Subsidiary Author	Translator	
20	Short Title	Short Title	Short Title
21	Alternate Title	Abbreviation	
22	ISBN/ISSN		
23	DOI	DOI	DOI
24	Original Publication	Original Grant Number	History
25	Reprint Edition	Review Date	
26	Reviewed Item	Reviewed Item	
27	Custom 1	Contact Name	
28	Custom 2	Contact Address	Congress Number
29	Custom 3	Contact Phone	
30	Custom 4	Contact Fax	
31	Custom 5	Funding Number	
32	Custom 6	CFDA Number	
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	Call Number
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, J-L

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1	Generic	Journal Article	Legal Rule or Regulation
2	Author	Author	Author
3	Year	Year	Year
4	Title	Title	Title
5	Secondary Author		Issuing Organization
6	Secondary Title	Journal	Title Number
7	Place Published		Place Published
8	Publisher		Publisher
9	Volume	Volume	Rule Number
10	Number of Volumes		Session Number
11	Number	Issue	Start Page
12	Pages	Pages	Pages
13	Section	Start Page	Section Number
14	Tertiary Author		
15	Tertiary Title		Supplement No.
16	Edition	Epub Date	Edition
17	Date	Date	Date of Code Edition
18	Type of Work	Type of Article	Type of Work
19	Subsidiary Author		
20	Short Title	Short Title	
21	Alternate Title	Alternate Journal	Abbreviation
22	ISBN/ISSN	ISSN	Document Number
23	DOI	DOI	DOI
24	Original Publication	Original Publication	History
25	Reprint Edition	Reprint Edition	
26	Reviewed Item	Reviewed Item	
27	Custom 1	Legal Note	
28	Custom 2	PMCID	
29	Custom 3		
30	Custom 4		
31	Custom 5		
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	Call Number
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, Mag-Man

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1	Generic	Magazine Article	Manuscript
2	Author	Author	Author
3	Year	Year	Year
4	Title	Title	Title
5	Secondary Author		
6	Secondary Title	Magazine	Collection Title
7	Place Published	Place Published	City
8	Publisher	Publisher	Library/Archive
9	Volume	Volume	Volume/Storage Container
10	Number of Volumes	Frequency	Manuscript Number
11	Number	Issue Number	Folio Number
12	Pages	Pages	Pages
13	Section	Start Page	Start Page
14	Tertiary Author		
15	Tertiary Title		
16	Edition	Edition	Description of Material
17	Date	Date	Date
18	Type of Work	Type of Article	Type of Work
19	Subsidiary Author		
20	Short Title	Short Title	Short Title
21	Alternate Title	Alternate Magazine	Abbreviation
22	ISBN/ISSN	ISSN	
23	DOI	DOI	DOI
24	Original Publication	Original Publication	
25	Reprint Edition	Reprint Edition	
26	Reviewed Item	Reviewed Item	
27	Custom 1		
28	Custom 2		
29	Custom 3		
30	Custom 4		
31	Custom 5		
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	Call Number
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author

49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, Map-N

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1	**Generic**	**Map**	**Newspaper Article**
2	Author	Cartographer	Reporter
3	Year	Year	Year
4	Title	Title	Title
5	Secondary Author	Series Editor	
6	Secondary Title	Series Title	Newspaper
7	Place Published	City	City
8	Publisher	Publisher	Publisher
9	Volume		Volume
10	Number of Volumes		Frequency
11	Number		Start Page
12	Pages	Description	Pages
13	Section		Section
14	Tertiary Author		
15	Tertiary Title		
16	Edition	Edition	Edition
17	Date	Date	Issue Date
18	Type of Work	Type	Type of Article
19	Subsidiary Author		
20	Short Title	Short Title	Short Title
21	Alternate Title	Abbreviation	
22	ISBN/ISSN	ISBN	ISSN
23	DOI	DOI	DOI
24	Original Publication		Original Publication
25	Reprint Edition		Reprint Edition
26	Reviewed Item		Reviewed Item
27	Custom 1	Scale	Column
28	Custom 2	Area	
29	Custom 3	Size	
30	Custom 4		
31	Custom 5	Packaging Method	
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	Call Number
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address

44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, Online

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1	**Generic**	**Online Database**	**Online Multimedia**
2	Author	Author	Created By
3	Year	Year	Year
4	Title	Title	Title
5	Secondary Author		Series Editor
6	Secondary Title	Periodical	Series Title
7	Place Published		
8	Publisher	Publisher	Distributor
9	Volume	Volume	
10	Number of Volumes		
11	Number		Number of Screens
12	Pages	Pages	
13	Section		
14	Tertiary Author		
15	Tertiary Title		
16	Edition	Date Published	
17	Date	Date Accessed	Date Accessed
18	Type of Work	Type of Work	Type of Work
19	Subsidiary Author		
20	Short Title	Short Title	
21	Alternate Title		
22	ISBN/ISSN	Report Number	
23	DOI	DOI	DOI
24	Original Publication		
25	Reprint Edition		
26	Reviewed Item		
27	Custom 1		Year Cited
28	Custom 2		Date Cited
29	Custom 3		
30	Custom 4		
31	Custom 5		Format/Length
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number		
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract

39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date		
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, Pam-Pat

Prev Next

1	**Generic**	**Pamphlet**	**Patent**
2	Author	Author	Inventor
3	Year	Year	Year
4	Title	Title	Title
5	Secondary Author	Institution	Issuing Organization
6	Secondary Title	Published Source	Published Source
7	Place Published	City	Country
8	Publisher	Publisher	Assignee
9	Volume	Number	Patent Version Number
10	Number of Volumes		
11	Number	Series Volume	Application Number
12	Pages	Number of Pages	Pages
13	Section	Pages	International Patent Number
14	Tertiary Author		International Title
15	Tertiary Title		International Author
16	Edition	Edition	International Patent Classification
17	Date	Date	Date
18	Type of Work	Type of Work	Patent Type
19	Subsidiary Author	Translator	
20	Short Title	Short Title	Short Title
21	Alternate Title	Abbreviation	
22	ISBN/ISSN	ISBN	Patent Number
23	DOI	DOI	DOI
24	Original Publication	Original Publication	Priority Numbers
25	Reprint Edition	Reprint Edition	
26	Reviewed Item		
27	Custom 1		
28	Custom 2		Issue Date
29	Custom 3		Designated States
30	Custom 4		Attorney/Agent
31	Custom 5	Packaging Method	References

32	Custom 6		Legal Status
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	Call Number
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Inventor Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, Pers-Report

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1	**Generic**	**Personal Communication**	**Report**
2	Author	Author	Author
3	Year	Year	Year
4	Title	Title	Title
5	Secondary Author	Recipient	Series Editor
6	Secondary Title		Series Title
7	Place Published	City	City
8	Publisher	Publisher	Institution
9	Volume		Volume
10	Number of Volumes	Communication Number	Series Volume
11	Number	Folio Number	Document Number
12	Pages	Pages	Pages
13	Section		
14	Tertiary Author		Publisher
15	Tertiary Title		
16	Edition	Description	Edition
17	Date	Date	Date
18	Type of Work	Type	Type
19	Subsidiary Author		Department/Division
20	Short Title	Short Title	Short Title
21	Alternate Title	Abbreviation	Alternate Title
22	ISBN/ISSN		Report Number
23	DOI	DOI	DOI
24	Original Publication		Contents
25	Reprint Edition		

26	Reviewed Item		
27	Custom 1		
28	Custom 2		
29	Custom 3		
30	Custom 4		
31	Custom 5		Issue
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	Call Number
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, Ser-Stan

Prev Next

1	**Generic**	**Serial**	**Standard**
2	Author	Author	Institution
3	Year	Year	Year
4	Title	Title	Title
5	Secondary Author	Editor	
6	Secondary Title	Secondary Title	Section Title
7	Place Published	City	Place Published
8	Publisher	Publisher	Publisher
9	Volume	Volume	Rule Number
10	Number of Volumes	Number of Volumes	Session Number
11	Number	Series Volume	Start Page
12	Pages	Pages	Pages
13	Section	Chapter	Section Number
14	Tertiary Author	Series Editor	
15	Tertiary Title	Series Title	Paper Number
16	Edition	Edition	
17	Date	Date	Date
18	Type of Work	Type of Work	Type of Work
19	Subsidiary Author	Volume Editor	

20	Short Title	Short Title	
21	Alternate Title	Abbreviation	Abbreviation
22	ISBN/ISSN	ISBN	Document Number
23	DOI	DOI	DOI
24	Original Publication	Original Publication	
25	Reprint Edition	Reprint Edition	
26	Reviewed Item	Reviewed Item	
27	Custom 1	Section	
28	Custom 2	Report Number	
29	Custom 3		
30	Custom 4		
31	Custom 5	Packaging Method	
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	Call Number
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, Stat-Thesis

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1	**Generic**	**Statute**	**Thesis**
2	Author		Author
3	Year	Year	Year
4	Title	Name of Act	Title
5	Secondary Author		
6	Secondary Title	Code	Academic Department
7	Place Published	Country	City
8	Publisher	Source	University
9	Volume	Code Number	Degree
10	Number of Volumes	Statute Number	
11	Number	Public Law Number	Document Number
12	Pages	Pages	Number of Pages
13	Section	Sections	

14	Tertiary Author		Advisor
15	Tertiary Title	International Source	
16	Edition	Session	
17	Date	Date Enacted	Date
18	Type of Work		Thesis Type
19	Subsidiary Author		
20	Short Title	Short Title	Short Title
21	Alternate Title	Abbreviation	
22	ISBN/ISSN		
23	DOI	DOI	DOI
24	Original Publication	History	
25	Reprint Edition		
26	Reviewed Item	Article Number	
27	Custom 1		
28	Custom 2		
29	Custom 3		
30	Custom 4	Publisher	
31	Custom 5	Volume	
32	Custom 6		
33	Custom 7		
34	Accession Number	Accession Number	Accession Number
35	Call Number	Call Number	Call Number
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	Access Date
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, Unpub-Web

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1	**Generic**	**Unpublished Work**	**Web Page**
2	Author	Author	Author
3	Year	Year	Year
4	Title	Title of Work	Title
5	Secondary Author		Series Editor
6	Secondary Title	Series Title	Series Title
7	Place Published	City	City

8	Publisher	Institution	Publisher
9	Volume		Access Year
10	Number of Volumes		
11	Number	Number	Access Date
12	Pages	Pages	Description
13	Section		
14	Tertiary Author		
15	Tertiary Title	Department	
16	Edition		Edition
17	Date	Date	Last Update Date
18	Type of Work	Type of Work	Type of Medium
19	Subsidiary Author		
20	Short Title	Short Title	Short Title
21	Alternate Title	Abbreviation	Alternate Title
22	ISBN/ISSN		ISBN
23	DOI	DOI	DOI
24	Original Publication		Contents
25	Reprint Edition		
26	Reviewed Item		
27	Custom 1		Year Cited
28	Custom 2		Date Cited
29	Custom 3		
30	Custom 4		
31	Custom 5		
32	Custom 6		
33	Custom 7		
34	Accession Number		Accession Number
35	Call Number		Call Number
36	Label	Label	Label
37	Keywords	Keywords	Keywords
38	Abstract	Abstract	Abstract
39	Notes	Notes	Notes
40	Research Notes	Research Notes	Research Notes
41	URL	URL	URL
42	File Attachments	File Attachments	File Attachments
43	Author Address	Author Address	Author Address
44	Figure	Figure	Figure
45	Caption	Caption	Caption
46	Access Date	Access Date	
47	Custom 8		
48	Translated Author	Translated Author	Translated Author
49	Translated Title	Translated Title	Translated Title
50	Name of Database	Name of Database	Name of Database
51	Database Provider	Database Provider	Database Provider
52	Language	Language	Language
53	Added to Library	Added to Library	Added to Library
54	Last Updated	Last Updated	Last Updated

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Reference Types, Unused

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1	**Generic**	**Unused 1**	**Unused 2**	**Unused 3**

2	Author			
3	Year			
4	Title			
5	Secondary Author			
6	Secondary Title			
7	Place Published			
8	Publisher			
9	Volume			
10	Number of Volumes			
11	Number			
12	Pages			
13	Section			
14	Tertiary Author			
15	Tertiary Title			
16	Edition			
17	Date			
18	Type of Work			
19	Subsidiary Author			
20	Short Title			
21	Alternate Title			
22	ISBN/ISSN			
23	DOI			
24	Original Publication			
25	Reprint Edition			
26	Reviewed Item			
27	Custom 1			
28	Custom 2			
29	Custom 3			
30	Custom 4			
31	Custom 5			
32	Custom 6			
33	Custom 7			
34	Accession Number			
35	Call Number			
36	Label			
37	Keywords			
38	Abstract			
39	Notes			
40	Research Notes			
41	URL			
42	File Attachments			
43	Author Address			
44	Figure			
45	Caption			
46	Access Date			
47	Custom 8			
48	Translated Author			
49	Translated Title			
50	Name of Database			
51	Database Provider			
52	Language			
53	Added to Library			
54	Last Updated			

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Direct Export Formats and Import Formats

About Direct Export and Import Formats

What do we mean by "direct export" and "import formats?"

Direct Export: The information provider includes an option to save directly to EndNote. When you select this option, the information provider automatically looks for the appropriate filter in your EndNote Filters folder. You simply direct the references to the appropriate EndNote library. How well the information transfers depends on how accurately the information provider has tagged each item of bibliographic information. For a list of providers that offer direct export, see Direct Export Providers.

Note: UTF-8 (Unicode) is the default character encoding for text, XML, and HTML export from the product. RTF uses ASCII encoding for ASCII characters and "code page escapes" to encode characters beyond ASCII.

Importing: When an information provider does not provide direct export to EndNote, the process of importing references becomes a little more complicated. You must save references from the information provider to a text file in a tagged format. Then, in EndNote, you must use the *File>Import* feature to select the tagged text file for import, choose the appropriate import filter, and then start the importing process. For a list of providers with downloading instructions, see Output Formats with Corresponding Import Options.

You also have another option for copying references into your EndNote libraries. See Introduction to Searching Online Databases for information about directly searching and downloading from various online databases.

Copyright Issues and Fair Use of Downloaded Data
EndNote gives you the capability to import references downloaded from online databases into its libraries. Some producers of online reference databases expressly prohibit such use and storage of their data, while others may charge an extra fee for a license to use the data in this way. Before you download references from a database, be sure to carefully check the copyright and fair use notices for the database. Note that different databases may have varying restrictions, even from the same information provider (such as DIALOG or Ovid).

APIs and Plug-ins

The “RSServices API” is technology from Thomson Reuters that provides a way to build on the power of EndNote. It exposes programmatic access to the core functionality of the EndNote application, allowing third parties to access database content and integrate EndNote with other tools. With the RSServices API users can create “plug-ins” that work within the EndNote interface to add customized functionality to EndNote and extend connectivity with other programs. Most of the RSServices API functions work with EndNote versions X-X4.

The basic functions of the API enable users to:

- Build plug-ins that add new functionality to EndNote
- Provide better integration with third-party tools and products.
- Create tools that extend the GUI of EndNote
- Script or batch existing EndNote capabilities and features
- Directly access records and data in EndNote Libraries (databases)
- Leverage the power of the EndNote formatting engine (Formatter)

- Directly Import or Export into or out of EndNote.

The RSServices API is intended for technical audiences who have knowledge of object-oriented programming languages, particularly C and C++. Users should also be familiar with the tools needed to produce compiled application code or DLLs. The API is available for both the Macintosh and Windows operating systems and behaves identically on each, unless otherwise specified.

Individual customers and third-party partners are encouraged to use the RSServices API to develop tools that closely interact with EndNote. Users are also encouraged to share their code and ideas with others on the EndNote User Forums - http://community.thomsonreuters.com/ts/?category.id=endnote.

While individuals are welcome to use and share their work with others, any party developing a component or tool that uses the RSServices API for commercial or wide-spread use must also sign a license agreement with Thomson Reuters to legally employ the API, RDK and any associated tools, documentation, or code.

The RSServices Development Kit (RDK)

Supporting documentation and code samples are provided as part of the RSServices Development Kit (RDK), the RDK is available by request directly from the Thomson Reuters EndNote team. The RDK is designed to work with several compilers and tools, including Apple's XCode and Microsoft's Visual Studio. In all cases, APIs are published in the C/C++ programming language, as are all samples and example code. It is assumed that the reader has a validly licensed copy of one or more of the aforementioned compilation products, as Thomson Reuters does not supply or warrant such tools as part of the RDK. While it should be possible to port these interfaces to additional compilers or programming languages, readers should consult their license agreement or the Thomson Reuters EndNote team before doing so.

Contact the Thomson Reuters EndNote team at: http://www.endnote.com/ensuggest.asp

Direct Export Providers

Many information provider web sites include a direct export option that allows you to send copies of references directly to an EndNote library. The direct export process automatically selects an EndNote import filter to map bibliographic information into the appropriate EndNote fields. All you need to do is choose the EndNote library into which the data should be imported.

Note: In some cases, you may be required to select an appropriate filter. When the direct export process is started, EndNote first checks the file for tags that are specific to a common import type, such as the EndNote, Web of Science, or RIS format. If no match is found, EndNote searches through all filters for a vendor ID and database ID that match the file. If no match is found, you are prompted to select a filter.

The systems listed below provide a direct export of references into EndNote. At the time this file was created, these were the current instructions for each information provider listed in the table. If you find that these formats have changed, please check the documentation from your information provider or contact us.

This is not a complete list, and the number of providers keeps growing, so check with your information providers to find out whether they participate!

Note: UTF-8 (Unicode) is the default character encoding for text, XML, and HTML export from the product. RTF uses ASCII encoding for ASCII characters and "code page escapes" to encode characters beyond ASCII.

Information Provider	Type of Data/Access	How to Direct Export
ALEPH	Various library Web sites	The ExLibris system allows for the addition of an export feature that exports data in the RIS format. Depending on the site, it is under *Save* or *Email*.
American Psychological Association	PsycInfo Online http:// www.apa.org	

	Subscription required	
Bibliotech.dk	Agricultural and Veterinary Information http:// bibliotek.dk.sogning.php	This requires setup; open the Bibliotech Help file and look under "Exporting to Reference Manager, EndNote."
BioMedCentral	All journals http:// www.biomedcentral.com Free access	Use the *Send to EndNote* button.
BioOne	Biomedical http:// www.bioone.org Subscription required	1. Do your search. 2. Press the *Abstract* button on one of your references. 3. Select the *Create Reference* link. 4. Select *EndNote* for downloading.
Blackwell Synergy	All journals published by Blackwell that are online http:// www.blackwell-synergy.com	1. Do your search. 2. Click the *Highlighted* box. 3. At the top of the page, click the *Download all highlighted abstracts to Reference Manager* button. 4. At the bottom of the page, select the EndNote format and click *Download references*.
BMJ	British Medical Journal; Tobacco Control Database http:// bmj.bmj.com/ cgi/ citmgr Free access	1. Do your search. 2. Check each reference you want to export. 3. Select *Download to citation manager* and click *Go*. 4. Select *Download ALL selected Citations to Citation Manager*. 5. Click *EndNote*. 6. Select the appropriate EndNote library.
Buffalo University	Library catalog http:// ublib.buffalo.edu/libraries/ e-resources/bison/ off.html Access for Buffalo University students only	
CABI-Direct	CABI Databases http:// www.cabdirect.org Subscription required	1. Search and then Mark your records. 2. Scroll to the bottom of the page, and before the word Export, choose *EndNote*.
Canadian Journal of Communication	http:// www.cjc-online.ca Subscription required	1. Do your search. 2. Select an article by clicking the *Abstract* button. 3. On the right side, there is a bar called the Research Support Tool; select *Capture Cite* and follow the instructions.
CCLR	Reference Sight Database provided by the University of Waterloo Centre for Contact Lens Research (formerly Bausch & Lomb Vision Science Reference Database)	1. Register (free sign in) in order to access Advanced options. 2. Do your search and mark the references you want to save. 3. At the bottom of the page, under Download Format, select *Bibliographic*

	http:// www.referencesight.com Free subscription	*Software Format*. 4. Click *Download References Now*. 5. When asked whether to *Save* or *Open* the file, choose *Open* and select the *EndNote* program.
Delphion	Patent data http:// www.delphion.com Subscription required	1. Do your search. 2. Click the "Data Extract" tab. 3. From the Select Format list, choose *EndNote, RefMan, ProCite (RIS)*. 4. Mark the records you want and click *Download* to start processing the file. 5. When asked whether to *Save* or *Open* the file, choose *Open* and then select *EndNote*.
EBSCO	All EBSCO databases http:// www.ebsco.com/ Subscription required	Click *Save*, click the Bibliographic Manager tab, click *Citations in Direct Export Format*, and click *Save*.
Ei Engineering Village	Elsevier Engineering Information database http:// www.ei.org Subscription required	
Elsevier	Science Direct http:// www.elsevier.com Subscription required	1. Do your search. 2. Check each reference you want to export. 3. Click the *Export citation* link. 4. On the Export screen, mark *Citations*. 5. Under Export, choose *Citations and Abstracts*. 6. For the file format, choose *RIS Format*.
EMBASE	EMBASE database http:// www.embase.com Subscription required	
ERIC	ERIC database http:// www.eric.ed.gov Free access	1. Do your search. 2. For each record you want, select the record and then click the *Add to my clipboard* button to add it to your set. 3. Select the Clipboard. 4. Mark the records you want to export, and click *Export recordst*. 5. On the Export dialog, select "Citation Manager File" and click *Download*. 6. On the file dialog, click *Open*.
ESDS Government	Economic and Social Data Service for the UK, Government Social Data Survey Information http:// www.esds.ac.uk/government/search/ Free access	1. Do your search. 2. Mark the records you want to save. 3. Click *Export to EndNote*.
Google Scholar	Broad literature search	First, set your preferences:

	http:// scholar.google.com/ Free access	1. Go to http:// scholar.google.com. 2. Next to the *Search* button, click *Scholar Preferences*. 3. Scroll down to the "Bibliography Manager" section. 4. Select "Show links to import citations into" and then "EndNote." 5. Click *Save Preferences*. You are returned to the Google Scholar search page, where you can perform a search. Each search result will include the button *Import into EndNote*.
HAPI	Hispanic American Periodical Index (UCLA) http:// hapi.ucla.edu/ Subscription required	1. Search and then add record to Marked List. 2. Select *Export to EndNote*.
IEEE	Institute of Electrical and Electronics Engineers, Inc.; All databases http:// ieeexplore.ieee.org/ Xplore/ guesthome.jsp	1. Do your search. 2. Go to the abstract (not PDF). 3. Click *Download Citation*. 4. Choose whether you want "citation" or "citation plus abstract," and choose the file format "ISI ResearchSoft."
JAMA and Archives	Journal of the American Medical Association http:// pubs.ama-assn.org/ Free access	1. Do your search. 2. Check each reference you want to export. 3. Click the *Export citation* link. 4. On the Export screen, mark *Citations*. 5. Under Export, choose *Citations and Abstracts*. 6. For the file format, choose *RIS Format*.
JISC	Joint Information Systems Committee Collections http:// www.jisc-collections.ac.uk Subscription required	1. Search and then Mark the records you want to save. 2. Click the *Print, Email, Save* button. 3. Export to bibliographic software: EndNote.
JSTOR	The Scholarly Journal Archive http:// www.jstor.org/help/ export_help.html Subscription required	
Karger Publishing	Medical and scientific journals http:// www.karger.com/ Free access	1. Display the reference you wish to download. 2. Click *Download Citation*. 3. Click *Using Citation Manager Software*. 4. Open the file with EndNote, and choose an EndNote library.
Los Alamos National Laboratory	Library without walls http:// www.lanl.gov/ Free access	
MicroPatent	All articles	

	http:// www.micropat.com Subscription required	
Nature	Scientific data http:// www.nature.com Subscription required	
Nerac	All articles http:// www.nerac.com Subscription required	Follow the instructions on the MYACCOUNT page for setting up the direct export format.
NISC	All articles http:// www.nisc.com Subscription required	
OCLC	All databases http:// www.oclc.com Subscription required	1. Mark the records you want. 2. Select *Export*. 3. Select the EndNote library to import into. 4. Select the appropriate filter from the Filter Manager.
OhioLink	Multiple databases http:// www.ohiolink.edu Subscription required	A Record Output page exists where you can select the format you want to use. Select *EndNote-Refer/Reference Manager-RIS*.
OVID	All databases http:// www.ovid.com Subscription required	1. Select the citation(s) you wish to save. 2. Choose "Complete Record" and then *Direct Export* into EndNote. 3. Click *Save* to export directly into EndNote.
OVID SilverPlatter	400+ databases http:// www.ovid.com Subscription required	Select *Direct Export*. Select the Silverplatter.enf file to import.
Oxford Press Journals	Journal articles http:// www.oxfordjournals.org/ Free access	1. Do your search. 2. Check each reference you want to export. 3. Click the *Export citation* link. 4. On the Export screen, mark *Citations*. 5. Under Export, choose *Citations and Abstracts*. 6. For the file format, choose *RIS Format*.
Pacific Northwest Labs	Internal databases http:// www.pnl.gov Internal use only	
Patent Cafe	Patent data http:// www.patentcafe.com Subscription required	
PILOTS	Medical PTS research http:// www.ncptsd.va.gov/publications/pilots/	1. Do your search. 2. Mark your records. 3. Go to the Output tab. 4. Select *Citations and Abstracts* as the

	Internal use only	format to save the records. 5. Click the *Export to Database* option and select *EndNote*.
PNAS Online	Online science journal search tool at Boston University http:// cybele.bu.edu/biomass/ ar/ pnas/ all.shtml.htm	1. Do your search. 2. Mark your records. 3. At the bottom of the page, select *Download to Citation Manager*. 4. Select *EndNote*.
ProQuest	All databases http:// www.proquest.com Subscription required	1. Click on *Results & Marked List*. 2. Click *Export Citations*. 3. Select *Export directly to ProCite, EndNote or Reference Manager*, and EndNote will automatically open. 4. Select the appropriate EndNote library.
RLG	Historical and humanities http:// www.rlg.org Subscription required	Use the *Export to Bibliography* button, and select *EndNote*.
Science Magazine	Journals http:// www.sciencemag.org Subscription required	1. Do your search. 2. Check each reference you want to export. 3. Click the *Export citation* link. 4. On the Export screen, mark *Citations*. 5. Under Export, choose *Citations and Abstracts*. 6. For the file format, choose *RIS Format*.
Scopus	Scopus http:// www.scopus.com Subscription required	1. From the Results screen, click on *Export*. 2. On the Export screen: a) In the Export Format box, select *RIS Format*. b) In the Content Format box, select either "citations only" or more detailed records. 3. Select your library, and the imported references will display on the screen.
St. John of God, Ireland	Medical library http:// www.library.sjog.ie Internal use only	Select *Export to Bibliographic Database*.
Stanford University's HighWire Press	HighWire Press http:// highwire.stanford.edu/ Free access	1. Do your search. 2. Check each reference you want to export. 3. Select *download to citation manager* and click *Go*. 4. Click *download citations to Citation Manager*. 5. Click *EndNote*.
Telemed	Telemed http:// tie.telemed.org Free access	1. Do your search. 2. Check each reference you want to display and click *show citations*.

		3. Check each reference you want to export and click *export*. 4. Click *Export the selected citation(s)* to EndNote.
Thieme	Journal publications http:// www.thieme-connect.com/ ejournals/ home.html Subscription required	Click *Export to Bibliographic Database*.
Web of Science	Thomson Reuters Subscription required	1. Display your marked references. 2. Look under Output Records and select the option to output *Full Records*. 3. Click *Export to Reference Software* to have the references exported directly to EndNote.
WebFeat	Federated Search Engine http:// www.webfeat.org	Click *Export to Bibliographic Management*.
WilsonWeb	General science and social science journals http:// vnweb.hwwilsonweb.com/ hww/ login.jhtml Required login	1. Click on *Results & Marked List*. 2. Click *Export Citations*. 3. Select *Export directly to ProCite, EndNote, or Reference Manager*. 4. Select the appropriate EndNote library.

Output Formats with Corresponding Import Options

To import references, you must first save references from the information provider to a text file in a tagged format. Then, in EndNote, use the *File>Import* feature to select the tagged text file for import, choose the appropriate import filter, and then start the importing process.

Importing Reference Data into EndNote includes more detailed information about importing. See General Importing Instructions for step-by-step instructions.

Look in the Filters book in the table of contents for information about how to open, view, and edit filters. Filters direct tagged bits of bibliographic information to corresponding EndNote fields. Many of the filters include a Comments section with tips about how to best download references for importing into EndNote.

The list of providers below, with their recommended output formats and import filters, is simply a subset of those services that are supported. We provide hundreds of import filters in your EndNote Filters folder.

At the time this file was created, these were the current format options for each information provider listed in the table. If you find that these formats have changed, please check the documentation from your information provider or contact us.

Note: All files must be saved as plain text (. txt) files before importing. If references are sent to you in the body of an email, save the email to a plain text file for importing.

Information Provider	Recommended Download Format	Import Option
AARP AgeLine	http:// research.aarp.org/ageline/home.html There is no method for downloading data from this database. Instead, save the results screen as a plain text file with your web browser's *Save* command. The	Ageline (AARP) filter

	resulting text file contains tags which are preceded by 18 spaces.	
ACM Digital Library (Association for Computing Machinery)	Users with subscription access to this web site can save multiple records to a BINDER. Once saved, you can export the records in an EndNote format. Non-subscribers can download one record at a time: 1. Create a search. 2. Click on an article. 3. Scroll half-way down the page and select DISPLAY EndNote. Limitations: Since only plain text files can be imported into EndNote, you cannot import images, graphics, etc. Before importing, you may need to edit the file to insert a comma after corporate author names. Otherwise, EndNote will not be able to distinguish corporate authors from personal authors.	EndNote Import
CAS SciFinder	Save references in the "Tagged Format" (*. txt).	SciFinder (CAS) filter
CSA (formerly Cambridge Scientific Abstracts)	From the CSA search results screen, click *Save/Print/Email*. On the "Save/ Print/Email" screen, select: Record Format: Full Format Save File Format: PC Click *Save*. Your Web browser asks where to save the file. If your Web browser lets you save in different file formats, make sure you save as a "Text Only" (*. txt) file.	Various filters for CSA databases are provided in the EndNote Filters folder.
DIALOG	Set your communication software's option to capture text. Use Dialog's Format 5 with "tag" appended to the TYPE command -- type "s1/5/1-20 tag". You must download data in Format 5. If Format 5 is not available, try the "full" format, which is sometimes the same as Format 5. For questions concerning Dialog's many formats, please contact Dialog's tech support.	Various DIALOG filters are provided in the EndNote Filters folder.
DIMDI	Use the DLOAD command with report D1 (e.g. DLOAD REPORT=D1).	Various DIMDI filters are provided in the EndNote Filters folder.
EBSCOhost	After adding selected references to your folder, click "View Folder" or "Folder has items" to see its contents. On the Folder Content page, click *Export*. On the Export Manager page, select "Generic bibliographic management software" to save a file to disk. Click *Save*.	Various EBSCO filters are provided in the EndNote Filters folder.
EDINA	Use the "Name" format, where data is tagged with words such as "Author" rather than "AU." Because there are so many different formats used for source data, you may need to manually edit source data after importing. EndNote cannot parse author names that are not clearly delimited, such as "S Hughes B Reynolds S A Bell & C Gardner." You	Various EDINA filters are available in the EndNote Filters folder.

	will need to manually edit author names.	
Emerald	Display the marked list, click "display for download (ASCII)," and then save as a plain text file. The filter provided works for these Emerald databases: Emerald Management Reviews at http:// www.emeraldinsight.com/revs/ Computer Abstracts International Database at http:// www. emeraldinsight.com/ caid International Civil Engineering Abstracts at http:// www.emeraldinsight.com/ icea/ Computer & Communications Security Abstracts at http:// www.emeraldinsight.com/ ccsa/ Current Awareness Abstracts at http:// www.emeraldinsight.com/ caa/ Limitations: Page numbers are separated by a hyphen with spaces on either side of it. You will need to manually remove the spaces after importing.	Emerald filter
InfoTrac (Gale)	From the E-Mail Delivery panel at the bottom of the marked list window, restrict the contents to "citation;" do not choose "full article." Limitations: Records often have extraneous information in the title field, which must be removed manually after importing.	InfoTrac (GALE) filter
INIST	1. Click the *Enregistrer* button. 2. Select the records you wish to download. 3. Under " Quels champs?" choose " Tous les champs." 4. Under " Incluez" choose " Numéro de notice et nom de la base de données" and " Libellés abrégés." 3. Click the *Sauvegarde de notices* button	Various INIST filters are provided in the EndNote Filters folder.
INNOPAC	Save references in the "EndNote" format.	EndNote Import
Knowledge Finder	Place document in the Save file, and select the document. Choose *Export Selected Documents* from the File menu.	Various Knowledge Finder filters are provided in the EndNote Filters folder.
Medscape	After selecting the desired records and adding them to your clipboard, click the *Save or Email Clipboard* link. Save or email your clipboard in PC or Mac MEDLARS format as a plain text (*. txt) file.	MEDLINE (Medscape) filter
NERAC	Save your file as plain text (*. txt).	NERAC
OCLC FirstSearch	1. Mark the records you wish to download. 2. In the navigation pane, click *Export*. 3. Click the radio button next to "The marked records" or "A range of records." 4. Click the radio button next to "EndNote." 5. Click *Export* and save to a Text file.	Various OCLC filters are provided in the EndNote Filters folder.
Ovid	After selecting the references you wish to download, click *Results Manager*. Choose the following options:	The appropriate Ovid filter will be selected

	Fields: Complete Reference Citation Format: Reprint/Medlars (or Direct Export, if available) Click the *Email* or *Save* button. Save the file as plain text (*. txt).	automatically when using *Direct Export* option. If you are using Ovid's multiple database searching, you must select the *Direct Export* citation format.
ProQuest	1. Select the desired references and then click the "My Research Summary" tab. 2. Click the "Documents and Bibliography" tab. 3. Choose "Export," then either "Export directly to ProCite, EndNote or Reference Manager," or "Download in a format compatible with ProCite, EndNote, Reference Manager and RefWorks." If you choose the former, make sure your data is displayed in a tagged format before saving as a text file.	ProQuest filter
PsycINFO	http:// www.apa.org After marking the records you wish to download, choose *Full PsycINFO Record* then click the *Display Marked Records* button. Select the text, then copy and paste it into a text editor, saving the file it as plain text (*. txt).	Use the PsycINFO (APA) filter.
PubMed	For detailed instructions on how to search the PubMed database, see Importing References from PubMed in EndNote Help. You can also get detailed instructions from our EndNote Support site at http://www.endnote.com/support/faqs/Import/faq1.asp You can check current download instructions for NLM PubMed at any time at http:// www.pubmed.gov .	PubMed (NLM) filter
SilverPlatter WebSPIRS	Once you've obtained your search results, click *Save*. Select the following "Save Records" options: Which fields?: All fields Include: Record number and database name Field labels: Short labels. Click the *Save Records* button. Use your Web browser to save the page as "Text Only" (do not save in HTML format).	Various SilverPlatter filters are provided in the EndNote Filters folder.
STN	Set your communication software's options to capture text to a file. Type the command "Display All".	Various STN filters are provided in the EndNote Filters folder.
UnCover (Ingenta)	Using your email software, save references emailed to you as a "Plain Text" or "Text Only" file.	UnCover (INGENTA)
VHL (Virtual Health Library)	1. After selecting the desired references, scroll to the bottom of the page and click "Your collection" (or "Su selleccíon"). 2. Cancel the print dialog, and then save the screen as a plain text file.	Various VHL filters are provided in the EndNote Filters folder.
All Databases Web of Science	1. Go to the *All Databases* or *Web of Science* Search page and perform a search. 2. From the Results page, select the records	ISI-CE filter

	that you wish to export to EndNote. 3. Go to Output Records and select the option to output Full Record in step 2. 4. Select *Save to Export to EndNote, RefMan, ProCite*. 5. On the Processing page, click the *Export* button. 6. You may also choose *Save to Tab-delimited* to save the references to a text file, and then import them into EndNote. See Direct Export Formats.) You may also choose *Save to File* to save the references to a text file and import them into EndNote.	
Wilson	1. Click *Print Email Save*. 2. Click *Export to Bibliographic Software*. 3. Choose *The EndNote Filter* and click *Export*. 4. Save to a text file.	WilsonWeb filter
WorldCat (OCLC FirstSearch)	1. Mark those references to be saved and click *Export*. 2. Choose Text File. 3. Click *Export*.	WorldCat (OCLC) filter

Keyboard Commands

Menu Keyboard Commands

The EndNote menus display equivalent key commands next to many menu commands, so you can execute commands without taking your hands off the keyboard to use a mouse. You can use the following tables as a quick reference.

All commands are not always available to you. For example, if no references are highlighted in the Library window, the *Edit References* and *Move References to Trash* commands are not available from the *References* menu.

These tables list only those commands with a keyboard equivalent. Not all menu commands have a corresponding keystroke.

File Menu Command	Key Command
Open Library	Ctrl +O
Close Library	Ctrl +W
Save	Ctrl +S
Print	Ctrl +P
Exit	Ctrl+Q

Edit Menu Command	Key Command
Undo	Ctrl+Z
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Select All	Ctrl+A
Copy Formatted	Ctrl+K
Change Text	Ctrl+R
Font > Plain Font	Ctrl+L
Style > Plain	Ctrl+T
Style > Bold	Ctrl+B
Style > Italic	Ctrl+I
Style > Underline	Ctrl+U

References Menu Command	Key Command
New Reference	Ctrl +N
Edit References	Ctrl +E
Move References to Trash	Ctrl +D
Go To	Ctrl +J

File Attachments > Open File	Ctrl + Alt +P
File Attachments > Save As...	Ctrl +Shift+S
URL > Open URL	Ctrl +G
Next Reference	Ctrl + Page Down
Previous Reference	Ctrl + Page Up
Show All References	Ctrl + M

Tools Menu Command	Key Command
Search Library	Ctrl +F
Spell Check	Ctrl+Y
CWYW > Return to Word	Alt +1
CWYW > Insert Selected Citations	Alt +2
CWYW > Format Bibliography	Alt +3
CWYW > Import Traveling Library	Alt +8
CWYW > CWYW Preferences	Alt +9
Open Term Lists> Authors Term List Journals Term List Keywords Term List (Opens the appropriate list for the field where the cursor resides.)	Ctrl +1
Define Term Lists	Ctrl +4
Link Term Lists	Ctrl +3

Window Menu Command	Key Command
Close All Libraries	Ctrl+Shift+W

Help Menu Command	Key Command
Help Contents	F1

Editing Keyboard Commands

A full set of key commands is available so that you can enter references without using the mouse. For example, to create and enter a new reference without touching the mouse: type Ctrl +N to add a new reference, type the bibliographic information using Tab or Shift+Tab to move forward or backward between the fields, and then press Ctrl +W to save and close the reference.

Action	Key Command
create a new reference	Ctrl +N
select more than one reference	Ctrl +Click
select a range of references	Shift+Click
open selected references	Ctrl +E
close the active window	Ctrl +W
close all windows of the same type as the active window	Ctrl+Shift +W
select the next field	Tab
select the previous field	Shift+Tab
when the cursor is in an Author, Journal, or Keywords field, display the appropriate Term list for term selection	Ctrl +1
When entering text:	
undo the previous command	Ctrl +Z
cut selected text and put it on the clipboard	Ctrl +X
copy selected text and put it on the clipboard	Ctrl +C
paste text from the clipboard at the insertion point	Ctrl +V
select all text in a field	Ctrl +A
check spelling	Ctrl+Y
set the text style to Plain	Ctrl +T
select the Plain font	Ctrl +L
turn bold on or off	Ctrl +B
turn italic on or off	Ctrl +I
turn underline on or off	Ctrl +U

Use the Arrow keys to navigate within a field.

CWYW Keyboard Commands for Word

These keyboard commands are available when you use Cite While You Write with Microsoft Word. The table below shows the initial settings, but you can change the key command assignments. See Keyboard Shortcuts in Word.

Note that:

- Alt +1 is used for both *Return to Word* and *Go to EndNote*. The program determines which application is currently active and switches to the other application.
- Some of these commands are available both from Word and from EndNote.
- While you can change key assignments, keep in mind that most other key combinations are currently already in use in both EndNote and Word.

Cite While You Write Command	Key Command

Find Citation(s)	Alt +7
Insert Note	Alt +0
Insert Selected Citation(s)	Alt +2
Find Figure(s)	None Assigned
Go to EndNote	Alt +1
Return to Word	Alt +1
Edit Citation(s)	Alt +6
Edit Library References	Alt +5
Format Bibliography	Alt +3
Unformat Citations	Alt +4
Remove Field Codes	None Assigned
Export Traveling Library	Alt +8
Cite While You Write Preferences	Alt +9
Help	None Assigned

Specific to Word 2003	**Key Command**
Format Figures (Generate Figure List)	None Assigned
Specific to Word 2007	
Update Citations and Bibliography	None Assigned
Convert Word 2007 Citations to EndNote	None Assigned
Export Word 2007 Citations	None Assigned
Export Word 2007 Master List	None Assigned

Glossary

B

Boolean Operator: A Boolean operator is one of the connecting terms AND, OR, or NOT, used to combine search items. A matching reference must meet both of the conditions connected by the AND, so AND narrows the search compared to using either search item alone. OR is used to find records that match either of the conditions connected by the OR operator, and so widens the search. NOT is used to find any records that do not match the search item following it.

C

Cite While You Write: Cite While You Write software is installed with the EndNote program for use with Microsoft Word 2003 or 2007 (Windows) or Microsoft Word 2004 or 2008 (Macintosh) or OpenOffice.org version 3 Writer (Windows) or Apple iWorks Pages '09 (Macintosh). It integrates EndNote commands into your word processor for quick and easy insertion and formatting of citations, and it automatically formats bibliographies. Cite While You Write is the easiest and most efficient way to cite references and create a bibliography.

Connection Files: Connection Files are EndNote files used to store the information necessary to connect to and search online databases. Connection Files are stored in the Connections folder in your EndNote X3 folder and can be browsed using the Connection File Manager (from the Edit menu, choose Connection Files and select Open Connection Manager). To establish a connection to an online database, go to Tools>Online Search and select a service. Internet access is required.

Continuation Line: Continuation lines are second or subsequent lines of data belonging to a single tag, and are typically described in the context of a data file to be imported by EndNote. EndNote uses the indent level for continuation lines in order to distinguish text containing reference data from text containing instructions, prompts, and other miscellaneous text from your database's interface. Continuation lines need to be consistently indented the same number of spaces from the left margin.

D

Data File: A data file consists of the records captured or saved from a reference database. A data file must be a text file in order for its records to be imported by EndNote into an EndNote library.

Database: A database is a file consisting of one or more records, each containing one or more fields of information, such as the name of the author, title of publication, year of publication, and so on. In the context of EndNote, databases are typically collections of bibliographic data, and are referred to as libraries.

Default: A default is a value, action, or setting that a computer system or program will assume unless the user intervenes to override it.

Delimiters: Delimiters are punctuation that separates one term or field (or any piece of data) from another. Delimiters are used in the context of temporary citation markers (the curly braces are default delimiters that identify the temporary citations in the body of your text) and term lists.

Diacritics: Diacritics are phonetic variations, such as accents, associated with a letter. When using the Sort References command or formatting a bibliography, EndNote sorts diacritical characters according to the rules of the language that is selected on the Sort References dialog. Characters with diacritics are sorted differently in English, Spanish, Swedish, and other systems. Diacritical marks can be significant in searches. Use the “Match Case” search option to exactly match letters such as é, ü and î.

Display Fonts: EndNote has a concept of "Plain Font," as well as "Plain Size," and "Plain Style."All references in your EndNote library should be stored in the plain font, size, and style, unless a specific change is necessary (such as the use of the Symbol font, or italics for emphasis of a word). The appearance of the plain font is determined by the General font setting. This changes the font used to display the references, as well as being the font that is used when printing or exporting references directly from

EndNote. The Library font is the font used to display references in the Library window. Both fonts may be changed using EndNote's preferences.

E

EndNote Web: EndNote Web is a Web-based service designed to help students and researchers through the process of writing a research paper. EndNote Web includes some of the same features as the desktop version of EndNote, although its capabilities are limited. You can easily transfer references between EndNote Web and the desktop version of EndNote.

F

Field: A field refers to a part of an EndNote reference, such as the author, year, or title. In the EndNote Reference window, each field is displayed as its own section, containing a separate piece of information, such as author names or keywords. Fields are arranged in EndNote styles to show how the data should be formatted. They are arranged in EndNote import filters to show how the tagged data should be imported. EndNote allows for up to 52 fields in each reference.

Field Codes: Cite While You Write inserts hidden field codes around and inside the formatted citations in Microsoft Word. These hidden codes contain reference information, and allow EndNote to format, unformat, and reformat citations within your word processor.

Filter: A filter is a file consisting of one or more Reference Type templates that instruct EndNote how to interpret and import data into the corresponding fields in EndNote. Filters are selected as import options when you choose the Import command from EndNote's File menu. EndNote comes with a variety of filters, each designed for a specific database. You may also create your own filters, or modify any of those supplied with the program. Filters are stored in the Filters folder in the EndNote X3 folder; you may browse the list of filters by choosing Import Filters from the Edit menu and selecting Open Filter Manager.

Firewall: Firewalls are security measures that restrict access between computers and the Internet; they are typically used to block hackers from access to your private workstation or network. In order to search Z39.50 servers over the Internet, your network administrator may need to allow access to certain port numbers through a firewall.

G

Generic Fields and Reference Types: The Generic reference type includes the complete set of 52 fields that are available in EndNote. It is "generic" in that it is not specialized for a specific type of reference (such as a book or a journal article). EndNote has a fixed set of "generic" fields that provides the basis for all specific fields used in the different reference types. The generic field names are not worded to be reference type-specific (for example, the generic field name "Author" is equivalent to "Reporter" for a newspaper article or "Artist" for the Artwork reference type). Generic field names are used throughout EndNote (for example, in the Sort References and Search dialogs) to refer to a similar category of fields that can be found in the different reference types. When you choose a generic field name in any of these dialogs, it refers to all fields in that row of the Reference Types table.

Global Editing: Global editing commands allow you to make editing changes to a group of records at the same time, rather than having to edit each record individually. Change Text searches for text in your library, and either deletes that text or replaces it with other text that you specify. Change Field modifies any field in your library by either inserting text at the beginning or end of the field, replacing the contents of the field with different text, or deleting the contents of the field. Move Field provides a way to move the entire contents of one field to another field within a reference.

Groups: Groups are an effective way of breaking a large library into subsets. EndNote automatically generates several temporary groups: Search Results displays references found during the most recent search; Duplicate References displays the results of a duplicate search; Imported References displays the most recent batch of references transferred in with the Import command, and several Full Text groups display those references for which PDF files are attached. You can build Custom groups by highlighting individual records and adding them to a group. You can create a Smart group based on a search strategy. A Group lets you point to a subset of references. This does not copy the

references into a separate library. When you delete a Group, the records still exist in the library. You can include an individual reference in many Groups or none at all.

I

In-text Citation: An in-text citation is the brief citation to a reference that appears in the body of the text of a paper. Typically this is just the author name and year in parentheses, or a bibliography number.

Information Provider: An information provider is a service that provides access to one or more databases. Examples of information providers include Ovid, Thomson Reuters, SilverPlatter, and STN.

K

Keyword: A keyword is a term that helps identify a record, and that is used for efficient searching. Also known as a descriptor, index term, subject term, or subject. Multiple entries (words or phrases) can be entered in the Keywords field of a reference.

L

Library: In the context of using EndNote, a "library" is the term for your EndNote database of references. It is a collection of records of reference material. When you choose Open from EndNote's File menu, you open a library. The references are displayed in the Library window.

Literal Text: Literal text consists of any text in a data file that does not correspond to a field in EndNote. Literal text must be included in a filter in order for EndNote to parse multiple pieces of information found in a single tag in a record to the corresponding field or fields in EndNote. Examples of literal text include punctuation used to separate one piece of information from the next, as well as any identifying text, such as "vol." for Volume, or "pp." for Pages.

Log File: When using the Connect command to search and retrieve references from online remote databases, EndNote maintains a log file to record communication status messages with the remote database as well as a log of the references that were retrieved. The location of the log file can be determined (and changed) by choosing Preferences from the Edit menu, and clicking the Online option.

M

MARC (MAchine Readable Cataloging): MARC is a standardized format developed by the Library of Congress for producing machine-readable bibliographic records. MARC uses numeric tags such as tag 100 for Personal Author, and tag 245 for the Title.

Mnemonic Tag: A mnemonic tag is an abbreviated way of identifying the contents of the data that follows. Mnemonic tags frequently use the first two characters of the corresponding data, as in "AU-" for AUthor, "TI-" for TItle, or "SO-" for SOurce. Other mnemonic tags use a combination of the two naming conventions, as in "SO-<PY>" for the SOurce's Publication Year.

Mode: A mode is a display option in the Library window that affects where references are downloaded from an online database. You may want to always work in Integrated Library & Online Search Mode, where all groups and commands are available. When you download references from an online database, they are saved directly into your open library. The other option is to work primarily in Local Library Mode and switch to Online Search Mode when you want to search and download references from an online database. In Local Library Mode, the Online Search groups are not available. In Online Search Mode, only the Online Search groups are available, and references are downloaded into a temporary library. This allows you to download references from online databases without affecting your local library. Many library commands are not available in Online Search Mode.

O

Online Database: An online database is a remote database that is available online using EndNote's Connect command. These are typically databases that are accessible on a Z39.50 server. They include library

catalogs and other bibliographic reference databases. An Internet connection is required to access an online database, and some databases require a subscription.

Output Style: An output style is a file that, in conjunction with the reference type for a particular reference, controls the output format of in-text citations, references in a bibliography, figures, and tables. Each output style that you use is stored in a separate file and can be used by more than one library. An output style contains instructions that tell EndNote which fields to print, in what order, and with what associated punctuation. It may also include additional font or style instructions. Output styles are often referred to simply as styles.

P

Proxy Server: A proxy server is a server that all computers on a local network have to go through before accessing information on the Internet. By using a proxy server, an organization can improve network performance and filter what users connected to the network can access. Proxy servers are also used to help prevent unauthorized access to a private network.

PubMed: PubMed is the U.S. National Library of Medicine's online public access version of their MEDLINE database. You can directly search PubMed and save records with the Online Search command on EndNote's Tools menu.

R

Reference Types: An EndNote library can contain references from a variety of different sources, such as books, journal articles, and newspaper articles. We call these different sources reference types. EndNote provides built-in forms for these and other common reference types.

RTF File: RTF is an acronym for Rich Text Format, a standardized file format. You can save most word processor documents to this standard type of file while retaining formatting and styles. EndNote can Scan an RTF file in order to format in-text citations and generate a bibliography.

S

Sort: A sort defines how a set of references is ordered on a field by field basis, in either alphabetic or numeric order. Fields are sorted from left to right by character. Quotation marks, parentheses and other punctuation marks are considered during a sort, except when comparing title fields. In an alphabetic sort, punctuation comes first, then numbers, then the letters A-Z. Within a sort level, the sorting of diacritics (accented characters) is determined by the language setting. You may define a list of stop words that are ignored for sorting when they appear at the beginning of an author or title field.

Styles: Styles are the files that EndNote uses to determine how to arrange references for a wide variety of bibliographic formats. Styles are typically for specific journals, though they can also be based on more general style guides such as the Chicago Manual of Style or the MLA Handbook. EndNote comes with more than 3,700 preconfigured styles, although a Typical installation copies only the 100 most popular styles into the Styles folder of your EndNote X3 folder. You can do a custom installation to install categories of styles, or you can download individual styles from the EndNote web site. To preview and browse through the installed styles, choose Output Styles from the Edit menu, and select Open Style Manager. Styles are used to determine the format of references on the preview tab of the Library window as well as when you use the Print, Export, Format, Format Bibliography, and Copy Formatted commands. They are also referred to as output styles.

Subject Bibliography: A subject bibliography is a bibliography with sorted references grouped under sorted Subject Headings. Typical headings group references by Keyword, Author, or Journal Title, but you can base headings on any EndNote field or combination of fields. You can even group references by reference type.

Subscription Databases: Subscription databases are online bibliographic databases which require payment or some form of authorization to enable you to connect (as opposed to "free" databases or library catalogs). For more information about these databases, contact the individual information providers.

T

Tagged Data: Tagged data consists of an identifier, typically a mnemonic tag, in the left margin of a data file, followed by text for one or more fields of information. Data must be consistently tagged if it is to be imported by EndNote into the appropriate fields in EndNote.

Templates: Templates are used in both styles and filters to show EndNote how to output or import bibliographic data. The templates use field names to represent the actual bibliographic data as it should be arranged in a bibliographic entry (in the case of styles), or in a data file to be imported (in the case of filters). Typically, a different template is constructed for each reference type. Manuscript templates are used to create Microsoft Word documents that conform to electronic publishing guidelines. You can select a predefined template from either EndNote or Word, which triggers a manuscript template wizard.

Term Lists: Each library has preconfigured term lists for authors, journals, and keywords. The term lists maintain a list of the names or words entered into the corresponding fields. They are used to help with data entry by suggesting terms as you type. The Journals term list can also be used to store various abbreviations of the journal names and later use those abbreviations as needed in bibliographies.

Text File: A text file consists entirely of characters that can be typed from a standard keyboard. A text file may contain any character from the English alphabet, punctuation marks, spaces, and numbers. A text file cannot contain any control characters or text styles used by a word processor to format text. EndNote can only import records captured or saved as text files, and cannot read files saved in a word processor format. EndNote can export references to a text file, but cannot apply styles within the text file.

Traveling Library: When you use EndNote's Cite While You Write commands in Microsoft Word, each formatted citation in your document is saved with field codes that embed reference data in the document. The paper contains a "traveling library" of EndNote references cited. This makes it easy to use your document on other machines and share your document with colleagues.

U

Unicode: The Unicode Worldwide Character Standard is a character encoding system. Unicode provides a unique number for every character used by the principal written languages in the world, along with codes for a full range of punctuation, symbols, and control characters. These codes are constant, no matter what the platform, the program, or the language. It allows data to be transported through many different systems without corruption of extended characters.

URL: A URL, or Uniform Resource Locator, can be used to specify the location of any resource available on the Internet (typically for Web pages or FTP sites). A common format for a URL for a Web page is http://www.endnote.com.

W

Web of Science: Web of Science is the Web interface for access to the ISI Citation Databases, which cover over 8,000 international journals in the sciences, social sciences, and the arts and humanities. Through ISI Links, Web of Science also offers navigation to electronic full-text journal articles, genetic information, and chemical and patent databases. Please contact Thomson Reuters for subscription information. Search Web of Science just as you would search any other online database. Your search results are copied directly to the EndNote library of your choice.

Z

Z39.50: Z39.50 is a NISO protocol that describes the search and retrieval of information from online databases. It is primarily used for data retrieval from bibliographic databases.

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