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User's Guide

THOMSON™

EndNote®

Windows Version X1

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Chapter 1

Welcome to EndNote

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Introducing EndNote

Welcome to EndNote—the complete reference solution!

- EndNote is an online search tool—it provides a simple way to search online bibliographic databases and retrieve the references directly into EndNote. (EndNote can also import data files saved from a variety of online services, CD-ROMs, and library databases.)
- EndNote is a reference and figure database—it specializes in storing, managing, and searching for bibliographic references in your private reference library. You can organize figures—including charts, tables, pictures, and equations—and assign each figure its own caption and keywords.
- EndNote is a bibliography and manuscript maker—it formats citations, figures, and tables in Microsoft® Word with the Cite While You Write™ feature. Watch the reference, figure, and table lists grow as you insert citations in your manuscript. Microsoft Word templates guide you through the exacting manuscript requirements of publishers.

  You can also create bibliographies using Format Paper with other word processors.

See "What's New in EndNote X1" on page 24 for a list of the most recent features added to EndNote.

For late-breaking news and updates, please go to: http://www.endnote.com/support.

About This Manual

This manual assumes that you know how to use Windows, your word processor, and the mouse. For help on these topics, consult your computer owner's guide or your word processor manual.

Often there is more than one way to select a command in EndNote. A single command may be available from one of the main menus, from a context-sensitive right click menu, from a toolbar icon, or with a keyboard command. In most cases, this manual gives instructions for selecting commands from the main menus. If a menu command has a keyboard equivalent, the keyboard command appears next to the menu item. You can also refer to the "Keyboard Commands" appendix on page 663.

The following representations for key combinations are used:

Instruction	Explanation
CTRL+ESC	While holding down the CTRL key, press the ESC key.
CTRL+ALT+ENTER	While holding down the CTRL and ALT keys, press the ENTER key.

Menu names, menu selections, and button names appear in italic text.

Customer Services

Online Help and Release Notes

Online Help: You can access all of the information found in the manual by consulting the online Help file. From EndNote's *Help* menu, select *Contents* to view the various topics. For context-sensitive help, click the *Help* button found on various windows and dialogs or press the F1 key on your keyboard.

Release Notes: For documentation updates and correction notes for this release, refer to the Readme.txt file installed in the EndNote folder.

Late Breaking News: For late-breaking news and updates, please go to: http://www.endnote.com/support.

Register Your Copy of EndNote

If you haven't done so already, please mail, fax, or email your registration to Thomson ResearchSoft (go to http://www.endnote.com/encontact.asp). You also have the opportunity to register during installation. Even if you purchased EndNote directly from Thomson ResearchSoft, do not assume that you are registered. Registered users receive:

- free technical support
- special upgrade offers
- notification of new EndNote versions that are compatible with the latest version of your word processor

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) 438-5526 (country code is 01)
Fax: (760) 438-5573 (country code is 01)
Web/Email: http://www.endnote.com/encontact.asp

Customer Service (Orders, Billing, and Shipping)

Phone: (800) 336-4474 (country code is 01)
Fax: (215) 386-2911 (country code is 01)
Web/Email: http://www.endnote.com/encontact.asp

Technical Support

Contact Technical Support at Thomson ResearchSoft if you encounter problems while using EndNote. When you contact us, please have a clear description of the problem and know the version of your copy of Windows, EndNote, and your word processor. (To find the EndNote version, start EndNote and choose *About EndNote* from the *Help* menu.) Also have your EndNote product key available.

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

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

Technical support tips are also available on the EndNote website and through the endnote-interest email forum (see below).

International Customer and Technical Support

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

Go to http://www.endnote.com, click on *Contact Us*, and then click on *International Distributors* to find a local distributor.

The EndNote Website

The EndNote website (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 website and look under *Support and Services*.

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

The *EndNote-Interest* Email Forum

If you wish to join an ongoing email forum of EndNote users like yourself, go to the EndNote website at http://www.endnote.com, click on *Support and Services* and then scroll down for instructions on how to subscribe to the *EndNote Interest List*.

There are two types of subscriptions: The first delivers the endnote-interest messages individually, so that every time a user sends a message to endnote-interest, it is redirected to each member of the list. The second option is to subscribe to the endnote-interest-digest—a daily compendium of endnote-interest messages.

In general, Thomson ResearchSoft does not answer questions posted to endnote-interest, but lets users answer each other's questions. Contact Thomson ResearchSoft directly for a guaranteed response from technical support staff.

ADA VPAT

Thomson ResearchSoft is dedicated to developing software products that are usable for everyone, including those with physical challenges and disabilities. EndNote was designed to adhere to the ADA (Americans with Disabilities Act) Section 508 accessibility standards.

Please visit our website at http://www.endnote.com, and click the *Support & Services* link to access the VPAT (Voluntary Product Accessibility Template) document that describes the accessibility features that address the Section 508 Standards. The VPAT is an informational tool developed by industry and government to help facilitate the understanding of compatibility issues under Section 508.

What's New in EndNote X1

EndNote X1 includes these new and enhanced features:

- Use Microsoft Word 2007 to Cite While You Write. See "The Cite While You Write Commands in Word 2007" on page 271.
- Use Groups to view and manage subsets of references in your library. See "Using Groups" on page 234.
- Display multiple author names for each reference in the library reference list. See "Display Fields" on page 531.
- Use the Display Fonts preference to select your choice of font and size for the Library window, General text that you enter, Search text, and Field labels. See "Display Fonts" on page 520.
- Export your custom Reference Type table to easily share it with another EndNote user. See "Sharing Your Reference Type Table" on page 398.
- Convert ProCite databases to EndNote Libraries. See "Creating a Library from ProCite" on page 116.
- The new Cite While You Write add-in for Word eliminates conflicts with other add-ins such as Snag-it and FlashPaper.

Chapter 2

Installing and Upgrading EndNote

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Before You Install EndNote

Please read this section before you proceed with the installation.

You will need a valid EndNote product key to install the program. If you are upgrading from a previous version, you will also need your previous EndNote serial number.

Program Requirements

EndNote is 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 2000, with Service Pack 3 (some interface elements are not supported)
- Windows XP, with Service Pack 2
- Windows Vista

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
- In order to use EndNote's Online Search feature for searching online databases, an Internet connection is required. To use the *Open Link* command to access a website, you also need a Web browser installed.

NOTE: 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 ResearchSoft directly. You must do so within 30 days of purchase.

Word Processor Compatibility

As of June 2007, EndNote for Windows is compatible with:

- Microsoft Word for Windows 2000, XP (2002), 2003, 2007
- RTF files created with most word processors, including: Microsoft Word, WordPerfect, OpenOffice, StarOffice, FrameMaker, and WordPad.

Microsoft Word:

EndNote installs Cite While You Write commands in Microsoft Word. Word 2007 displays Cite While You Write commands on an EndNote tab. Earlier versions of Word display an EndNote submenu of commands on Word's *Tools* menu. Cite While You Write allows EndNote to format citations and create a bibliography for the document that is open in Word. You can format, unformat, and reformat a single document—without ever exiting your word processor.

In order for Cite While You Write to install properly, Microsoft Word 2000, XP, 2003, or 2007 must be correctly installed on your computer *prior to* installing EndNote.

If a supported version of Microsoft Word is installed on your computer, the appropriate Cite While You Write files are installed automatically for the current user when you run the EndNote installation. This feature can be used with a shared copy of Word or on a network.

RTF Documents:

For word processors other than Word, write your paper, insert in-text citations, then save to an RTF file and use EndNote's Format Paper feature to format the citations and bibliography. See Chapter 11 for details.

EndNote for Palm OS Requirements

If your computer has software installed to allow synchronizing with a Palm OS® handheld device, the EndNote installation program will ask whether you want to install EndNote for your handheld device.

Requirements for running EndNote on your handheld device include:

- Handheld device
- Palm Operating System 4.x or later
- Serial or USB communication for HotSync operations
- 16 MB RAM, with at least 8 MB available

See "Using EndNote on Palm OS Handhelds" on page 561 for information about how to install and use EndNote on a handheld device.

Installing EndNote

NOTE: If you are upgrading from a previous version of EndNote, please see “Upgrading from an Earlier EndNote Version” on page 31.

NOTE: Please see Chapter 21, “Using EndNote On a Network” for information about licensing, installing, and using EndNote in a network environment.

To install EndNote:

1. Log in to the local machine with administrative rights or as a user with program installation privileges. Make sure no applications are running, including virus protection software.
2. Start the EndNote installation program.

   If you downloaded the EndNote installer: Double click the installer file to start the EndNote Setup program.

   If you received EndNote on a CD: Insert the EndNote CD into your CD-ROM drive.

   The EndNote Setup program will start. If you do not have Autoplay enabled, choose *Run* from the *Start* menu, type “d:\setup” (use the drive letter appropriate to the drive containing the installation CD) and press ENTER.
3. Follow the instructions on the screen to complete the installation. Use the *Next* button to move forward between through these installation dialogs:

   Welcome: Thank you for purchasing EndNote!

   Registration Information: If you are installing the full version of EndNote, enter your EndNote product key. You must enter a valid product key to continue with installation of the full version of EndNote. The product key can be found in the EndNote X1 CD packaging, or on the order confirmation of your digital product.

   If you are upgrading from a previous version, you will also need your previous EndNote serial number.

   If you are installing the Demo version, choose the appropriate button. You do not need a product key or serial number to install the Demo version of EndNote.

User Information: Enter your name and organization.

Read Me Information: Read late-breaking news about this version of EndNote.

Palm Read Me Information: Read late-breaking news about EndNote for the Palm operating system.

End User License Agreement: You must select "I accept the license agreement" in order to continue with the installation.

Select Installation Type: We recommend that you select *Complete* to make sure you install all options, although you can choose *Custom* to hand pick the file groups to install.

Select Destination: By default, EndNote is installed in the C:\Program Files\EndNote X1 folder. You can use the *Browse* button to change the folder selection if you wish. If a previous installation of EndNote is found in the same folder, you will be given the option to either back up or overwrite the older files. If you back up files, they are placed in a Backup folder in the installation folder.

The check box titled "Install Examples to common document folder" is selected by default. Microsoft discourages copying user-writable files to the program folder—especially when running the Vista operating system. When the check box is selected, we copy the Examples folder to a shared destination for your operating system. For example, under Windows XP it is likely C:\Documents and Settings\All Users\Shared Documents\EndNote. So that the example files are still easily accessible, a shortcut to the folder is available from the EndNote X1 program folder.

Select Components: (Custom installations only) If you selected a Custom installation, see "Selecting Features" on page 30.

Select Default Reference Manager: (Microsoft Word 2007 only) If the installer detects Microsoft Word 2007, it asks whether to "Use EndNote as my default reference manager." Cite While You Write will be installed in Word 2007 in any case, but when this item is selected the installer will suppress Word's native Citations and Bibliography commands (the group normally found on the References tab in Word) in order to avoid confusion for the user.

Ready to Install: You can still click *Cancel* to stop the installation. Once you click *Next*, the installation program will begin installing EndNote files.

4. On the final "EndNote X1 is Successfully Installed" dialog, click *Register* to register your copy of EndNote, click *Finish* to close the installation program, or click *Run* to start EndNote.

To make sure the program installed correctly, see "Checking Your Installation" on page 33.

Custom Installations

Although we recommend that you use the *Complete* 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 just certain EndNote components.

To do a new custom installation:

1. Follow the instructions for "Installing EndNote" on page 28.
2. On the dialog titled "Select Installation Type," select *Custom*.
3. When you get to the dialog titled "Select Features," read the section below, "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 X1 is already installed:

1. Start the installation program as you would for a new installation.
2. On the "Application Maintenance" dialog, select the *Modify* option and click *Next*.
3. When you get to the "Select Features" dialog, read the section below, "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 EndNote.

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

Styles: These formats for creating bibliographies are grouped by type.

Connections: These files for directly retrieving references from online reference databases are grouped by information service provider.

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 Palm OS®: These are files required for using EndNote with the Palm 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. The options may include:

- Will be installed on local hard drive.
- Entire feature will be installed on local hard drive.
- Will be installed to run from network.
- Entire feature will be installed to run from network.
- Feature will be installed when required.
- Entire feature will be unavailable.

Upgrading from an Earlier EndNote Version

Before you begin, back up any custom styles, import filters, and connection files that you do not want overwritten.

While it is not required, we recommend that you uninstall any earlier version of EndNote before you install EndNote X1. See "Uninstalling EndNote" on page 35.

NOTE: During installation, you will need to enter both your new EndNote X1 product key, which is found in the EndNote X1 CD packaging or on the order confirmation for your digital product, and your old EndNote serial number. (The Demo version of EndNote does not require these.)

Install the upgrade just as you would a new installation. See "Installing EndNote" on page 28. By default, EndNote X1 is installed into the C:\Program Files\EndNote X1 folder.

Backing Up or Replacing Files

If Setup detects an earlier copy of the EndNote program in the installation folder, it alerts you and gives you two options. If you continue with the installation to install EndNote X1 into your existing EndNote folder, Setup removes the older EndNote application and word processor support files. You need to select what it should do with the styles, filters, and connection files from your older copy of EndNote. No matter which option you choose, your libraries will not be deleted; nor will any non-EndNote files in the EndNote folder.

- **Backup older files**: EndNote X1 provides complete, updated sets of style, filter, and connection files. But if you want to keep any of your older modified files to use with EndNote X1, you should choose this option. Doing so has EndNote create a "Backup" folder in the EndNote folder and all of the styles, filters, and connection files from your older installation are copied into that folder. After installing EndNote, you should move any of these files that you want to use into the Styles, Filters, or Connections folders installed with EndNote X1.
- **Remove older files**: If this option is selected, Setup replaces all of the styles, filters, and connection files from your existing EndNote installation with the new ones included with EndNote X1. Do *not* choose this option if you have custom styles, filters, or connection files that you want to save. If they have the same names as any of the files to be installed, the installer will overwrite them with the new files.

To make sure that EndNote is using the most recent set of files:

1. Start EndNote.
2. Go to the *Edit* menu and choose *Preferences.*
3. Click on the *Folder Locations* item.
4. If the folder paths do not include an EndNote X1 folder, click *EndNote Defaults* to update the paths.

NOTE: Cite While You Write support is linked to only one copy of the EndNote program, and only one instance can be used at one time. If you install the Cite While You Write Add-in, it will replace an older version even if you install EndNote in a separate folder.

Opening and Converting Old EndNote Libraries

EndNote X1 automatically converts libraries created with earlier versions of Endnote to the version 8/9/X/X1 format.

To 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*.

   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*. The conversion makes a *copy* of the original library in the version 8/9/X/X1 format, and leaves the original library intact.

NOTE: EndNote X1 libraries cannot be opened and used with versions of EndNote prior to version 8.

Using Old Style, Filter, and Connection Files

You may have created custom content files with an earlier version of EndNote. EndNote X1 can use your custom styles, filters, and connection files that were created with EndNote versions 4.0.1-X. Once you edit and save one of these files with EndNote X1, it is converted to the version 8/9/X/X1 format.

All of the styles, filters, and connection files supplied with EndNote X1 have been updated to the version 8/9/X/X1 format. The new filter and connection files can be used by previous versions of EndNote, with new fields simply ignored. However, EndNote 8/9/X/X1 styles *cannot* be used with versions of EndNote prior to version 8.

Checking Your Installation

To run EndNote, click the *Start* button, choose *Programs*, select *EndNote*, and then choose *EndNote Program*.

A dialog will ask you to open a reference library file. Choose *Cancel*. To check the version number of EndNote, choose *About EndNote* from the *Help* menu. Click the splash screen to clear it.

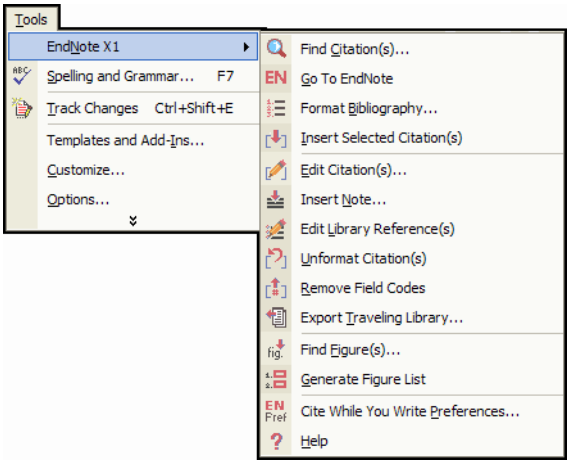
If you have trouble accessing the program, repeat the installation steps to verify that the program was correctly installed.

Checking Microsoft Word Support

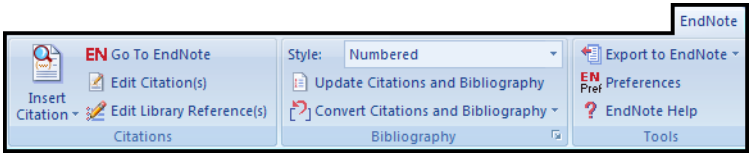
To see whether Cite While You Write is correctly installed, start Word.

In Word 2000, XP, or 2003, click on the *Tools* menu and you should see EndNote commands on an *EndNote X1* submenu. In Word 2007, you should see an *EndNote* tab.

Word 2000, XP, or 2003 *Tools* menu and *EndNote X1* submenu



Word 2007 *EndNote* tab



Cite While You Write commands may not be available if you upgraded your version of Word *after* installing EndNote, or if an administrator installed EndNote and you are running it from a different user account.

If Cite While You Write commands do not appear in Word for any reason, run the EndNote Configure utility. From the *Start* menu, list *All Programs*, and go to the *EndNote* item to choose *Configure EndNote*. The utility will search your system for Microsoft Word and install Add-in support for Cite While You Write.

Word 2000, XP, and 2003 also include an EndNote toolbar as an alternative way to select EndNote commands. If more than one EndNote toolbar appears in Word after upgrading EndNote, see "Two EndNote toolbars appear in Word" on page 609.

Automatically Updating Files

You can automatically update EndNote X1 when incremental program enhancements are available.

To update your copy of the EndNote program:

1. Open a connection to the Internet.
2. From EndNote's *Help* menu, select *EndNote Program Updates*.

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.

NOTE: You also have the option to download the latest content files at any time from our website at http://www.endnote.com. We continually update output styles, filters, connection files, and Microsoft Word templates.

Uninstalling EndNote

NOTE: For network installations, see "Uninstalling a Shared EndNote Program" on page 593.

Uninstalling CWYW and Palm OS Support

If Cite While You Write files for Microsoft Word and/or Palm OS files were installed during installation of the EndNote program, they will also be uninstalled along with the program. You can jump to the next section, "Uninstalling the EndNote Program."

If you used the Configure EndNote utility to install Cite While You Write files and/or Palm OS files, you should use that utility again to uninstall those files.

To uninstall support for Cite While You Write and/or EndNote for Palm OS:

1. Log on to the workstation as the current user. You do not have to be an administrator.
2. Launch the Configure EndNote utility. You can do this in one of these ways:
   - From the Windows *Start* menu, choose *All Programs>EndNote>Configure EndNote*.
   - Go to the EndNote program folder and double-click "Configure EndNote.exe."
3. Select *Remove all EndNote components for me* and click *Next*.

4. Continue through the uninstall process as instructed.

This uninstalls only CWYW and Palm OS support, and only for the current user.

Uninstalling the EndNote Program

To uninstall EndNote:

1. From the Windows *Start* menu, select *Control Panel*, or choose *Settings* and then *Control Panel*.
2. Select *Add or Remove Programs*.
3. In the list of currently installed programs, select *EndNote X1*.
4. Click the *Remove* button.

Or, you can uninstall by using the EndNote installation program:

1. From your EndNote CD, run Setup.exe.
2. On the "Application Maintenance" dialog, select *Remove* and click *Next*.
3. 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.

It will *not* delete your libraries or any new files you have created. It will *not* delete folders if they contain files you created. You will need to manually delete those files with Windows Explorer.

Chapter 3

The EndNote Guided Tour

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Introduction to the Guided Tour

This guided tour introduces you to the basics of using EndNote for storing references and writing papers. The guided tour is not designed to show you everything about EndNote, but it does provide a quick summary of some important features.

Part I: Introduction to an EndNote Library

Learn how to start EndNote, open a reference library, sort the reference list, select, open, and close a reference, and save references to a group. These skills prepare you for the rest of the Tour.

Part II: Setting EndNote Preferences

Learn how to set a default library to open automatically and how to change the display fonts.

Part III: Entering a Reference

Learn how to enter a reference, including inserting a figure and a file attachment.

Part IV: Searching Online Databases

Learn how to use EndNote to search online databases and library catalogs available online and save those references to an EndNote library. This feature requires that you have a connection to the Internet.

Part V: Importing References

Learn how to import references that have been downloaded from a database to a tagged text file.

Part VI: Searching EndNote Libraries and Previewing a Bibliography

Learn how to search for references in an EndNote library, and preview a formatted bibliography from an EndNote library.

Part VII: Using EndNote While Writing a Paper

Learn how to cite EndNote references while writing a paper with Microsoft Word (2000, XP, 2003, or 2007). You will insert citations and figures, and have EndNote generate a bibliography plus figures and tables for the paper.

(If you use a word processor other than Word, please see Chapter 11, "Scanning and Formatting RTF Files"for information about *Format Paper*.)

Are You Ready?

At this point we assume that both EndNote and Word are installed on your computer. If you have not installed EndNote, please follow the instructions in Chapter 2 before continuing.

The guided tour uses sample files that are installed in the Examples folder in the EndNote folder. These example files include a sample EndNote reference library called Paleo.enl and a number of image files.

Part I: Introduction to an EndNote Library

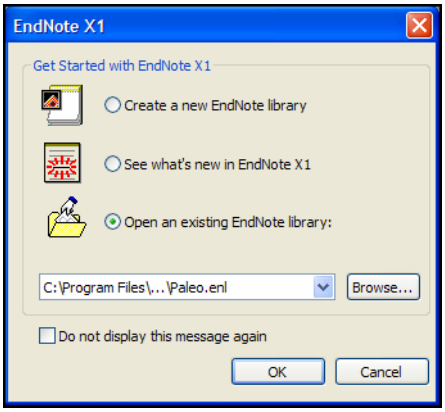
This part of the guided tour covers the basics of working with EndNote. In particular, you will learn how to:

- Start EndNote and open a library.
- Sort the reference list.
- Select, open, and close references in the EndNote library.
- Save references to groups.
- Quit from the EndNote program.

Start EndNote

To start the EndNote program and open the sample library:

1. From the *Start* menu, choose *Programs*, select *EndNote,* and then choose the *EndNote Program*. A dialog appears prompting you to open a reference library.

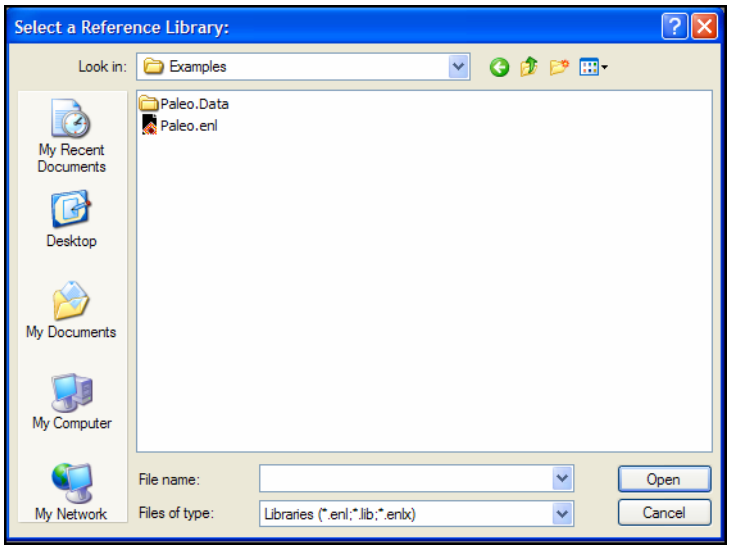


NOTE: If you have set a default library to open automatically, that library will open instead of the dialog shown above. If this happens, close the library, choose *Open* from the *File* menu, and continue with step 3.

2. Select *Open an existing EndNote library*.
3. To open the library, do one of these:
   - Select Paleo.enl in the drop-down list, and click *OK*.
   - If Paleo.enl does not appear in the drop-down list, click the *Browse* button to locate it. A dialog will appear prompting you to locate and open a reference library.

Use the “Look in:” list to find the EndNote X1 folder. By default, this will be on the C drive in the Program Files folder. To get there, click the “Look in:” list, choose the “C:” drive and click *Open*; select Program Files and click *Open*; and then select and open the EndNote X1 folder.

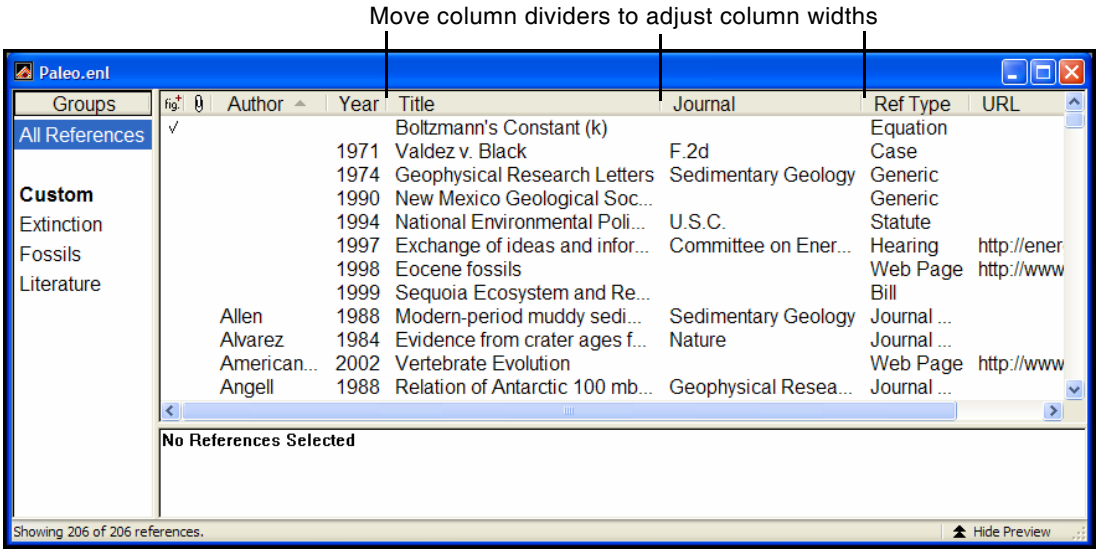
Select the Examples folder (or the shortcut to the Examples folder) and click *Open*. You should now see the file “Paleo.enl,” the example EndNote library. (Your folder View settings may or may not be set up to show the extension .ENL.) Select Paleo.enl and click *Open*.



NOTE: You can open a library from within EndNote by choosing *Open* from the *File* menu.

The Library Window

When you open the Paleo library you see the **Library window** listing all of the references that the library contains:



The Library window displays a multi-column list of references. By default, the first column in the reference list shows a *fig.* heading for references that include an attached graphic or file in the Figure field. The second 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 reference type, and the URL are displayed for each reference.

The left pane of the window lists various groups of references for easy retrieval. In a new library, only the *All References* group is available.

The information displayed here in the Library window, as well as the font used for the display, can be changed using the EndNote Preferences. Chapter 4 provides more information about customizing the Library window.

You can browse through your reference library by first selecting a reference, and then using the scroll bar, the scroll arrows, or the PAGE DOWN, PAGE UP, HOME, END, and ARROW keys.

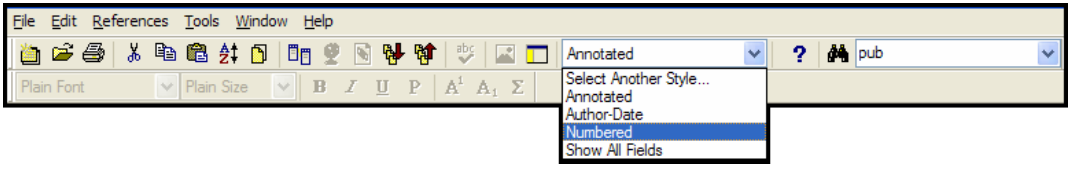
Preview References

You can easily see more detail about a reference by highlighting the reference and viewing the Preview pane at the bottom of the Library window.

To preview a reference:

1. First, if you do not have a preview pane in the window, click on the *Show Preview* button at the bottom of the window.
2. For this example, click on the reference titled "Geophysical Research Letters."

   The preview pane uses the current **output style** to display the selected reference as it will be formatted for a bibliography. EndNote's output styles (or just **styles**) represent the rules for creating bibliographies for a variety of journals and other publications. The styles determine how your references look when you print, export, preview, or create bibliographies.
3. To select a different output style to apply to the reference, go to the Main toolbar and select *Numbered* from the drop-down list of output styles.



Only one reference is displayed in the preview pane at a time. If multiple references are selected, only the active reference (surrounded by a dotted line) is displayed. The format of the reference in the preview pane can be changed at any time by choosing a different output style.



When the preview pane is showing, a *Hide Preview* button is available at the bottom of the window. You can click *Hide Preview* to hide the preview pane if you wish. The name of the button will toggle to *Show Preview*.

Sort the References

References can be easily sorted by clicking on a column heading (such as Author, Year, or Title).

To change the sort order:

1. Click the Author column heading to change the current Author sort from ascending order to descending order.



NOTE: This example shows references that include Japanese characters. EndNote uses Unicode to encode special characters, so that data is easily translated between platforms, programs, and languages. If boxes appear instead of characters, you may need to change the EndNote display fonts to a Unicode font. You will learn how to do this in the next section, "Part II: Setting EndNote Preferences." For some display elements, you may need to install special Windows Language Packs. Consult your Windows documentation for more information about Language Packs.

2. Click the Year column heading to see the references sorted in ascending order based on the year of publication.
3. Click the Year column heading again (a second time) to reverse the sort order and see the references sorted in *descending* order.
4. Now, click the Author column heading to return the sort order of the library to an alphabetical list sorted by the

author names. You may need to click the heading twice to return to ascending order.

Select, Open, and Close a Reference

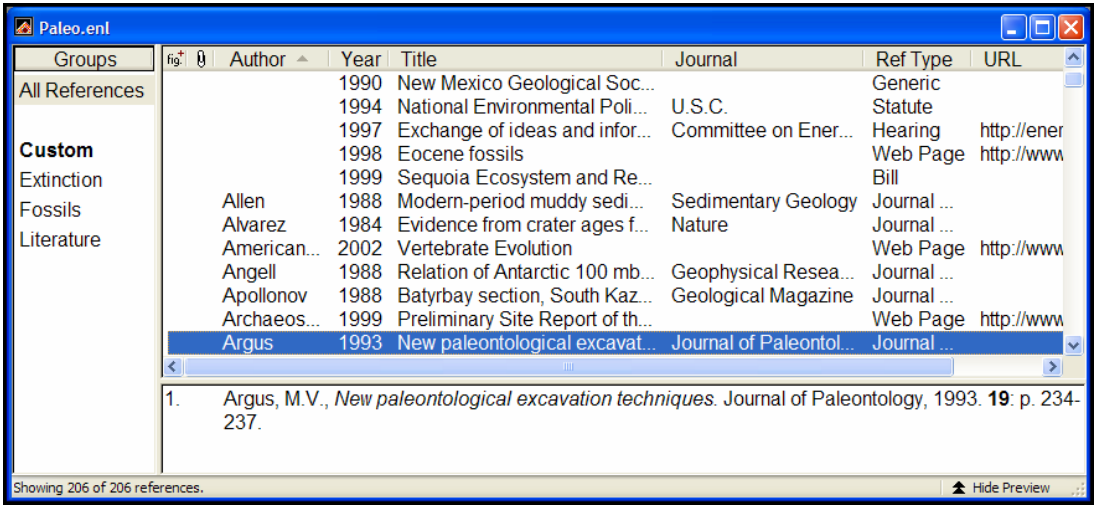
To work with specific references you must first select them in the Library window.

There are different ways to select a reference, such as clicking on the reference using the mouse, using the arrow keys, or typing the first few letters found in the field by which the library has been sorted.

To see how this works, click *once* on any reference to select it. If you have arrow keys on your keyboard, press the UP or DOWN ARROW to select the previous or next reference. When the library is sorted by author name (as it should be now), you can also select a reference by typing the first few letters of the author's last name.

To quickly find and display a reference:

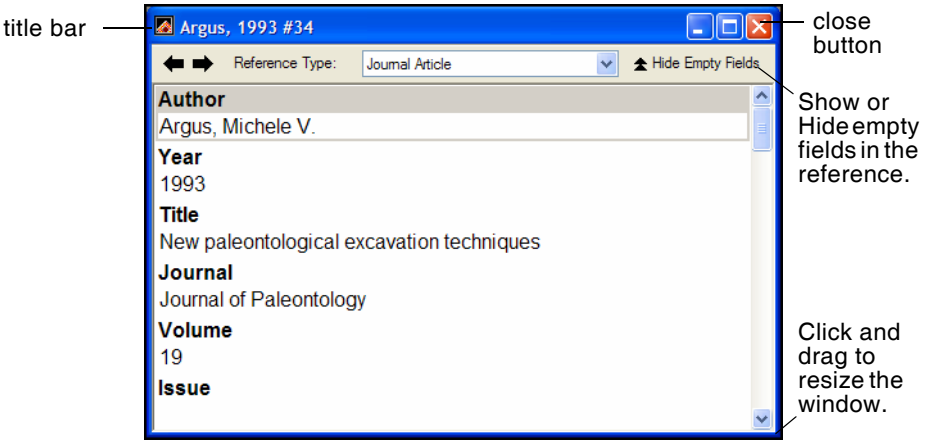
1. Select the first Argus reference in the list by typing "`arg`" without pausing between letters.



Now that the reference is selected, there are a number of things you can do with it, such as view its contents, copy, cut, delete, or edit it. For now, just open the reference to view the contents.

2. Open the selected Argus reference by pressing the ENTER key or by using the *Edit References* command on the *References* menu. You can also open a reference by double-clicking on it in the Library window.

The Reference window opens to display all of the information associated with the reference.



This is where you enter or edit information for a reference. The citation information is displayed at the top of the Reference window in the title bar, "Argus, 1993 #34." This information—the first author's last name, year, and record number—is used by EndNote to match citations in a paper to references in a library.

To view the rest of the reference, use the mouse to scroll down the Reference window, or press the TAB key to move forward from one field to the next. Press SHIFT+TAB to move backwards through the fields. Click the *Show Empty Fields/Hide Empty Fields* button to toggle between showing all fields in the reference and only those fields that contain data.

The window may also be resized by clicking and dragging the lower right window corner. To reposition the window, click on the title bar and drag the window to the desired location.

To close the reference:

You can close the reference in one of these ways:

- Click the close button in the upper corner of the Reference window.
- From the *File* menu, choose *Close Reference*.
- From the keyboard, press CTRL+W. Note that many of the menu commands have a keyboard equivalent next to them.

EndNote automatically saves all changes to a reference when the Reference window is closed.

Save References to a Group

The left pane of the library window lists groups of saved references. In a new library, only the *All References* group is available, which displays all of the references in the library. However, you can add up to 50 custom groups to a library.

The Paleo library has several custom groups of references. Click on the group names in the left pane of the library window to view the references in each group. Then, click *All References* to display all of the references in the library again.

To create a new group and add references to it:

1. From the *References* menu, go to the *Groups* submenu and select *Create New Group*. (Or, you could right click in the Groups pane to display a context-sensitive menu, and then select *Create New Group*.)

   In the Groups pane of the Library window, a group titled *New Group* is now highlighted for editing.

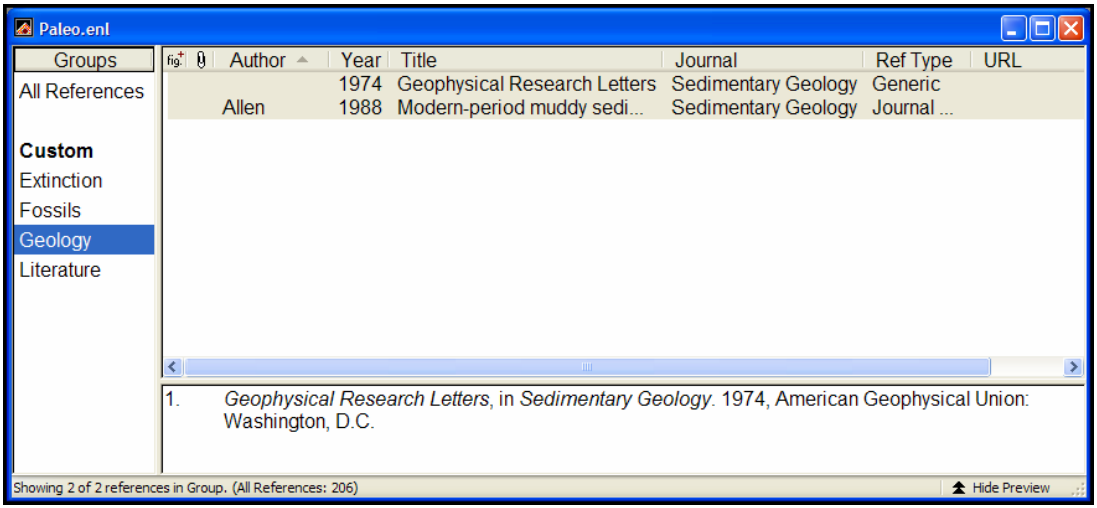
2. Type "Geology" as the group name, and then press ENTER or click in the reference list area to save the change. The reference list is blank, as there are no references in this new group.

3. Click on the *All References* group to display the entire library again.

4. In the Journal column, look for the first two references to Sedimentary Geology, and highlight them. To select non-contiguous references, hold down the CTRL key to as you click on them.

5. Drag the selected (highlighted) references to the new Geology group and drop them on the title of the group. (Or, you could go to the *References* menu and choose *Add References to>Geology*.

6. Click on the *Geology* group to display the two references now included in the group.



Click on *All References* to display all of the references in the library again.

To delete a group:

1. Right click on the *Geology* group to display a context-sensitive menu.
2. Select *Delete Group*.

Many of the commands for managing groups are available both from the *References* menu and from the right click context-sensitive menu.

This concludes Part I of the guided tour. If you do not plan to continue the tour, go to the *File* menu and choose *Exit* to close the program. Otherwise, you can continue with the tour.

Related Sections

See these sections in the manual for information related to this portion of the tour:

- Learn how to change the display of the Library window in Chapter 4, "The EndNote Library."
- To learn more about sorting, see "Sorting the Library" in Chapter 8.
- To learn more about creating and managing groups, see "Using Groups" in Chapter 8.

Part II: Setting EndNote Preferences

In this part of the guided tour you will learn how to:

- Display EndNote preferences
- Set a default library to open each time you start EndNote.
- Change the display fonts.

Open the Paleo Library

If EndNote is not already running, start it and open the Paleo library as shown under "Start EndNote" on page 41.

Access EndNote Preferences

To view or change the EndNote preferences:

From the *Edit menu*, choose *Preferences*.

Many of these preferences are stored in your Windows registry, although there are exceptions.

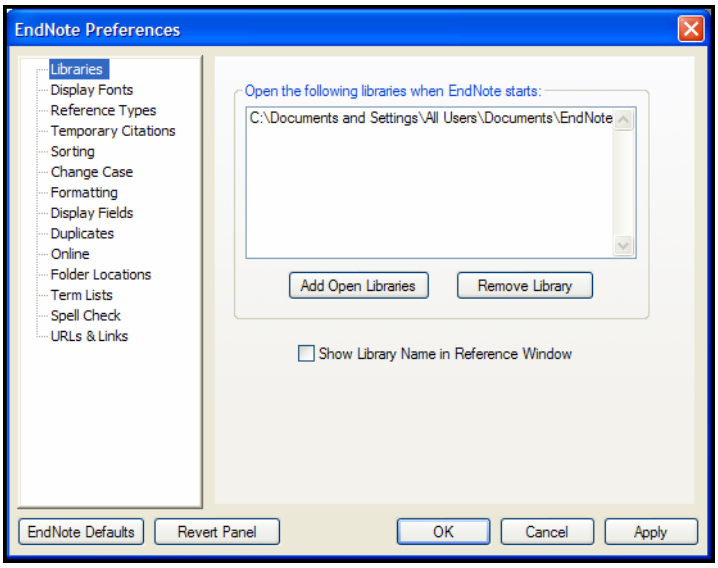
Set a Default Library

You can assign a library to open automatically every time you start EndNote. You will find it useful to set the Paleo library (Paleo.enl) as your default library for now. Later, when you create your own library, you can set it as the default library.

To set a default library:

1. If you haven't already, go to the *Edit* menu and choose *Preferences.*
2. In the list on the left, click *Libraries.*

3. Click *Add Open Libraries*. You should see the full path and filename of the Paleo library (Paleo.enl) listed at the top of the window.



4. Click *Apply* to save this change.

While you could click *OK* to leave the Preferences dialog, we are going to change another preference first.

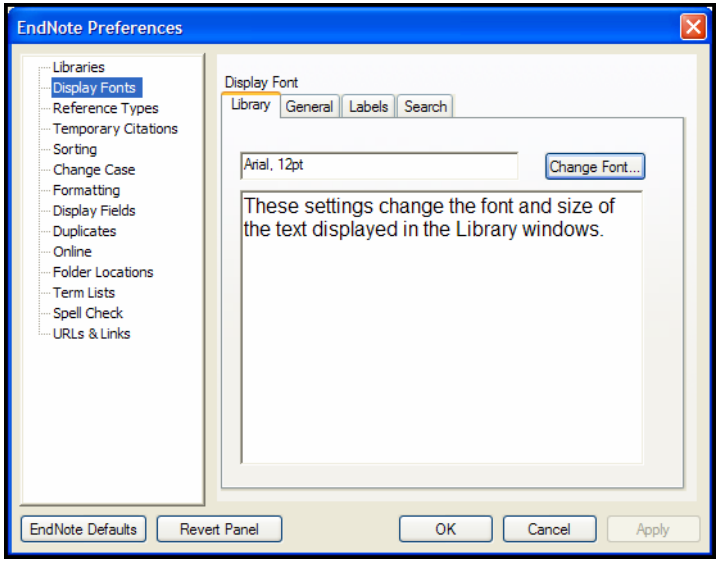
Change the Library Display Font

Next, pick a different font to display text in the Library window and the Reference window.

To change the display fonts:

1. If you are not currently viewing the EndNote Preferences window, go to the *Edit* menu and choose *Preferences*.
2. In the list on the left, click *Display Fonts*.
   - The Library font determines the font and size of the references listed in the Library window.
   - The General font changes the font 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.
   - The Fields font determines the font and size used for the Reference window field labels.

- The Search font determines the font and size applied to user-entered text on the Search window.



3. On the *Library* tab, click the *Change Font* button.
4. In the Font list, select *Arial Unicode MS* (or another Unicode font that supports Japanese characters) and click *OK* to save the change.

   EndNote uses Unicode to correctly handle extended characters. By selecting a Unicode font here, you can view extended characters in the Library window, such as the Japanese characters found in the Paleo library.
5. On the *General* tab, click the *Change Font* button.
6. In the Font list, select *Arial Unicode MS* (or another Unicode font that supports Japanese characters) and click *OK*.
7. Click *OK* to save the changes and leave the Preferences dialog.

Related Sections

See these sections in the manual for information related to this portion of the tour:

- Learn how to change the display of the Library window in Chapter 4, "The EndNote Library."
- The Preferences panels provide many ways to customize your version of EndNote. For example, you can ignore articles when sorting, set duplicate detection options, etc. See Chapter 18 for more information about working setting preferences.

Part III: Entering a Reference

In this part of the guided tour you will learn how to:

- Enter a reference into a library.
- Attach a figure and other types of files to a reference.

In this part of the tour, you are going to enter a journal article reference that includes attached files.

Open the Paleo Library

If EndNote is not already running, start it and open the Paleo library (Paleo.enl), as shown in Part I of the guided tour.

Create a New Reference

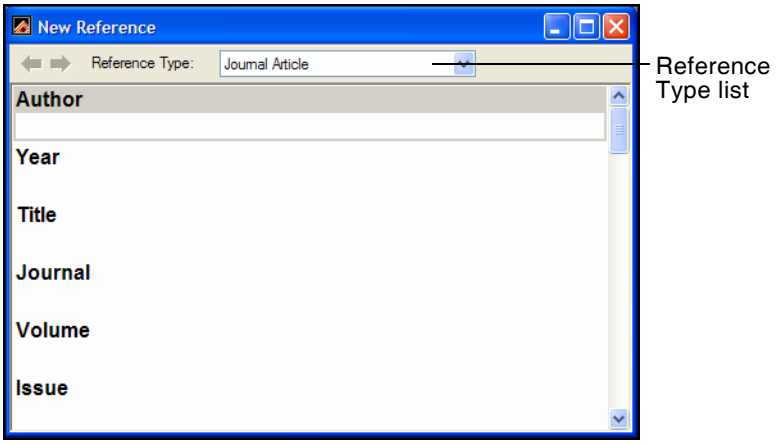
There are various ways to add references to an EndNote library:

- Type the reference information into the Reference window.
- Connect to an online bibliographic database and retrieve the references directly into EndNote, as demonstrated in part IV of this tour and described in Chapter 6: "Searching Online Databases with EndNote."
- Import text files of references that have been downloaded from online bibliographic databases or CD-ROMs, as demonstrated in part V of this tour and described in Chapter 7: "Importing Reference Data into EndNote."

This example demonstrates how to type reference information into EndNote.

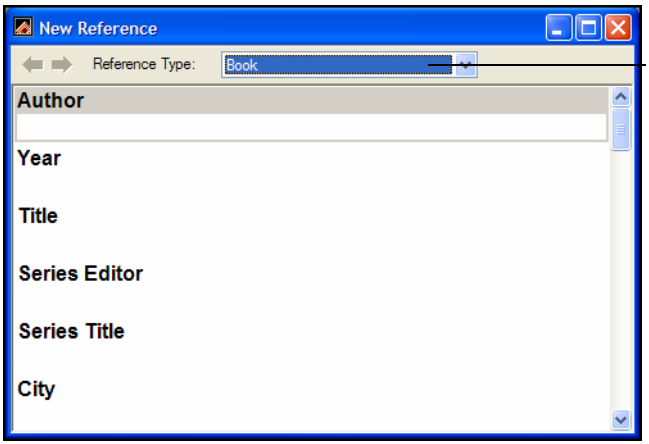
Once a library is open, you can add a new reference to it:

1. From the *References* menu, choose *New Reference* (CTRL+N). An empty Reference window opens with the words "New Reference" displayed at the top.



New references appear as journal articles (unless you change the default setting) but can be changed to any other type of reference using the *Reference Type* list at the top of the window.

2. Next, choose a reference type. Click the *Reference Type* list and choose *Book*.



Notice that the field list changes to reflect the type of bibliographic information you would record for a book. You are welcome to select other reference types from the list to see how the list of fields changes for each type of source.

Three reference types—Figure, Chart or Table, and Equation—are available specifically for cataloging picture files and object files, although you can add File Attachments, Figures and Captions to any reference type.

When you are done looking at different reference types, set the reference type back to the *Journal Article* reference type. You are now ready to enter reference information, beginning with the author names.

3. Enter author names for the reference. Individual author names *must* be entered one per line.

   a. Enter a personal author name with the first name first. With the cursor in the Author field, type:

      ```
      Tiberius Rex
      ```

      As you type, EndNote suggests names similar to the one you are entering. This is EndNote's way of using **term lists** to facilitate the process of entering new references.

NOTE: The auto-complete feature can be turned on or off with EndNote Term List preferences. It is available for Author fields when you enter author names with the last name first.

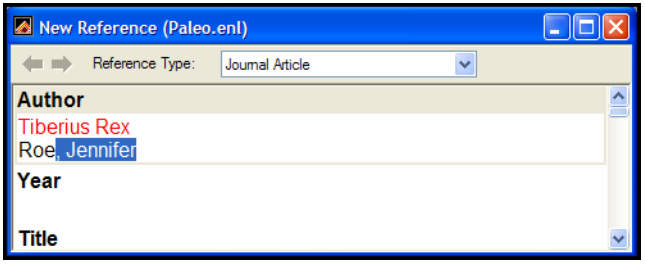
The name you are entering, Tiberius Rex, is a new author in this library, so keep typing until you complete the name and then press the ENTER key.

The name appears in red text to indicate that it is a new name in the Author term list for this library. When you close the reference, it will be added to the Author term list and the red text will change to black. You can read more about term lists (and how to turn these options on or off) in Chapter 9.

b. Enter the second author's name, but with the surname first:

```
Roe, Jennifer
```

This author is already in the Paleo library, so as you start typing the last name, you will see EndNote complete the name for you.



Press ENTER to accept EndNote's suggested author name.

c. For the third author, enter:

```
de Young, John Robert, Jr.
```

The first comma separates the last and first name. The second comma is inserted before suffix text, to make it clear that it is not part of the author's name for manipulation of name order or stripping to initials. Suffix text will always print after the other information for this author.

d. Enter the fourth author's name, which in this case is a corporate author:

```
University of California,, Berkeley
```

Corporate author names are entered with a following comma, so they will not be manipulated like personal

author names. In this case, the corporate author name has a comma within the name. We inserted two commas to allow for correct formatting. The first comma makes it clear that text up to that point should not be manipulated, and the second comma indicates that there is no "first name," yet includes suffix text.

4. Press TAB to accept the author name and move to the Year field. In the Year field, type:

   2006

5. Continue entering the reference as shown below, using the TAB key to move to the next field, and SHIFT+TAB to move to the previous field, if necessary. You can also use the mouse to click in the desired field. If information is not provided for a particular field, leave that field empty.

   Title: The scale and the feather: A suggested evolution

   Journal: Paleontology

   Volume: 3

   Issue: 1

   Pages: 125-128

   Date: November 22

   Keywords: Feathers
   Evolution
   Birds

   No extra punctuation (such as parentheses around the year) or text styles (such as bold or italic) are entered into the reference. EndNote adds the necessary punctuation and text style changes to the references when it creates a bibliography.

   While we are not entering any text into the Abstract or Notes fields, you could enter 64 K into each of these fields, which amounts to 10-12 pages text.

6. Next, attach a PDF file to the reference. You can attach just about any type of file to the File Attachments field of a reference.

   Scroll to the File Attachments field, and from the *References* menu, select *File Attachments* and then *Attach File* to display a file dialog. On the file dialog:

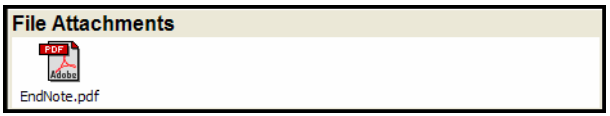
   a. Navigate to the folder Program Files\EndNote X1.

   b. Notice the check box titled "Copy this file to the default file attachment folder and create a relative link." Make

sure this box is selected so that EndNote will make a copy of the file to store with the library. That way, the attached file is always available to you, even when you move the library.

c. Highlight the file titled EndNote.PDF. This is the full EndNote manual located in the EndNote program folder.

d. Click *Open* to insert the file into the File Attachments field. A file icon will appear in the field.



You can attach up to 45 different files to a single reference, and you can double click a file icon to open the file with the default application.

7. Next, attach a figure file. Attached figures can be cited and displayed in Microsoft Word, which we will do later in the tour. You can attach a single figure file to each EndNote reference.

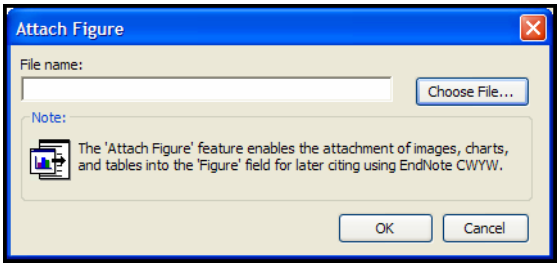
   Microsoft Word recognizes many file types as figures. Some valid file types include these graphic files:

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

   You can also insert object files, such as:

   - 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)

Scroll to the Figure and Caption fields, and from the *References* menu, select *Figure* and then *Attach Figure*.



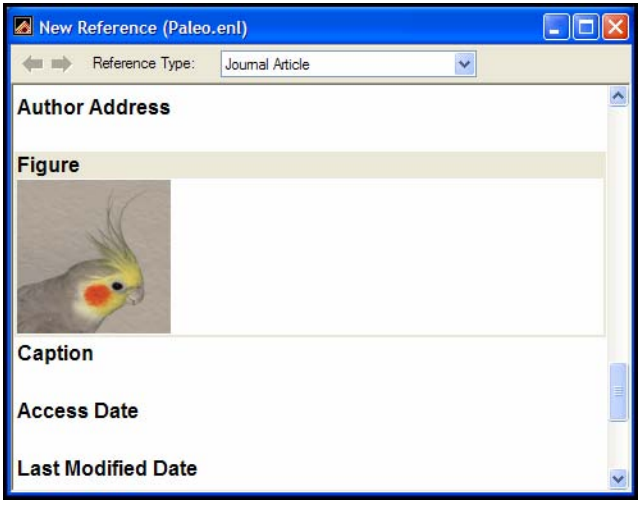
Click *Choose File* to display a file dialog.

On the file dialog:

a. Navigate to the folder:
Program Files\EndNote X1\Examples.

b. Highlight the file titled Feather2.BMP.

c. Click *Open* to insert the file into the Figure field.



The graphic appears as a thumbnail in the reference. EndNote copied the file to a .DATA folder stored with the Paleo library, and linked the copied graphic to this reference.

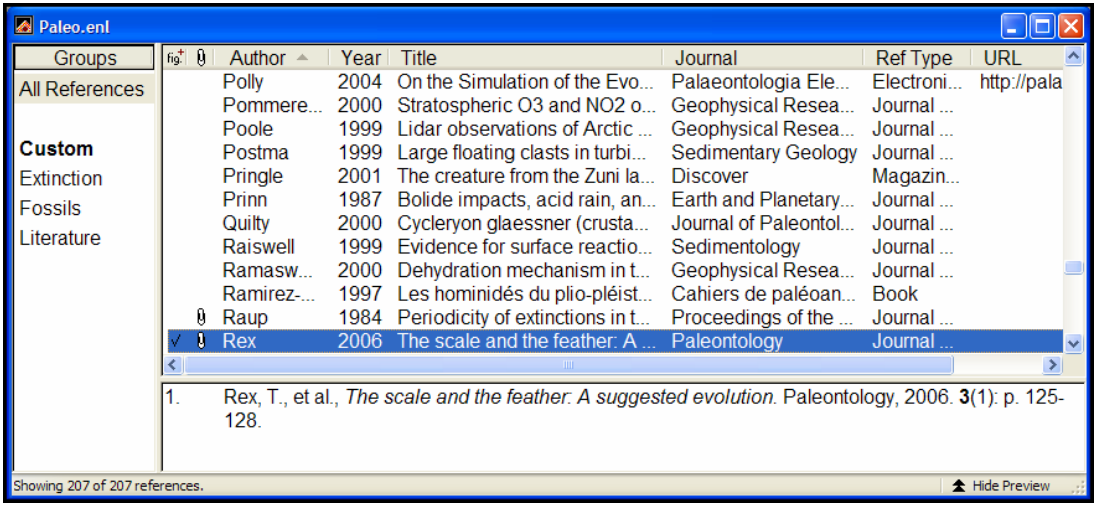
In the Caption field, enter:

```
Cockatiel Crest Feathering
```

Always enter a caption for your image. It assists in locating images, and it labels figures in your Microsoft Word documents.

8. Close the Reference window by clicking the close box (the X in the upper right corner of the Reference window), or by choosing *Close Reference* (CTRL+W) from the *File* menu.

All information is automatically saved when you close the reference window. Your new reference will appear in the Library window. The reference shows a check mark under the *Fig.* heading to indicate that the reference includes a figure, plus a paper clip icon to indicate an attached file.

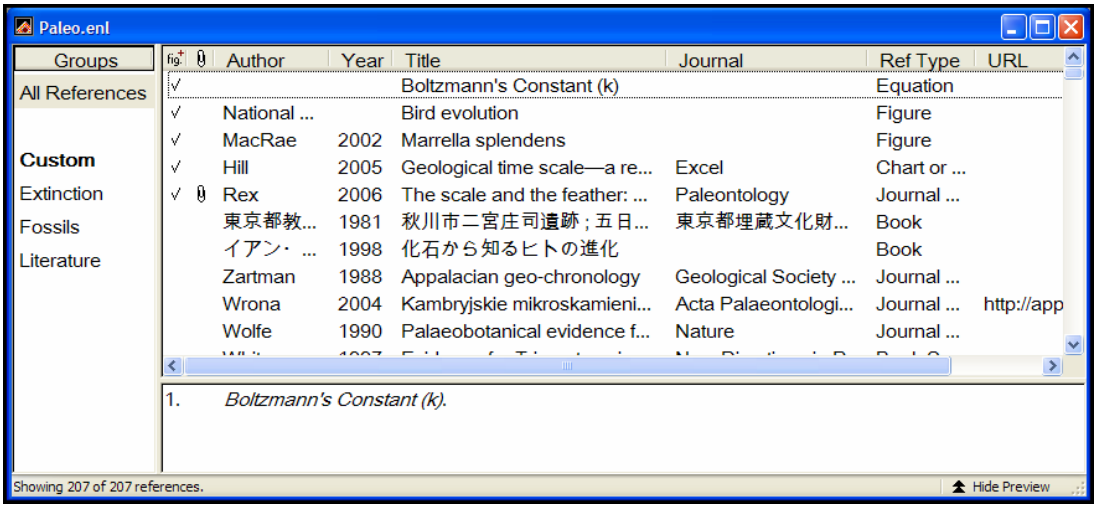


Locate References That Contain Attached Files or Figures

You can easily locate those references that contain attached figures and files.

To locate the references containing figures:

Click the Figure column heading (*fig.*) twice to sort records containing figures at the top of the list. Each reference with a check mark next to it has an attached figure that you can cite in Microsoft Word.



To locate the references containing attached files:

Click the paper clip icon in the second column heading twice to sort records containing attached files at the top of the list. References that include a paper clip have one or more attached files.

You can double-click on an individual reference if you would like to view the complete reference. When you are done viewing a reference, click the close button to close it.

Click the Author column heading to again order the list by author names in ascending (A to Z) order.

This concludes Part III of the guided tour. Part IV demonstrates how to search online databases and save your search results to an EndNote library. If you do not have an Internet connection, skip Part IV and move on to "Part V: Importing Reference Data into EndNote" on page 70.

If you are finished working with EndNote for now, go to the *File* menu and choose *Exit* to close the EndNote program.

Related Sections

See these sections in the manual for information related to this portion of the tour:

- If you are eager to begin creating your own library, see Chapter 4, "The EndNote Library. "
- Chapter 5, "Entering and Editing References," provides more detail about typing references into your library and inserting figures and files.
- For information about connecting directly to online bibliographic databases and retrieving references into EndNote, see Part IV of this tour and Chapter 6, "Searching Online Databases with EndNote."
- If you will be importing references that have been downloaded from an online or CD-ROM database, see Part V of this tour and Chapter 7, "Importing Reference Data into EndNote."

Part IV: Searching an Online Database

With 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. And to make it even easier, the results of your searches appear as EndNote references—ready for you to store in your own EndNote library.

This section will guide you through these basic steps:

- Connect to an online database.
- Search the database.
- Copy the references that you want to keep into an EndNote library.

NOTE: In order to follow along with this exercise, you must be at a computer with access to the Internet (either dial-up or a direct network connection).

About the PubMed Database

For this lesson, you will connect to PubMed, the National Library of Medicine's online public access version of their MEDLINE database. PubMed is the **online database** you will be searching; the National Library of Medicine is the **information provider**.

For Users With "Dial-up" Internet Connections

If you use a modem and a phone line to connect to the Internet, as opposed to a direct network connection, this section pertains to you.

Connecting: Most setups for dial-up connections are configured to automatically dial your information provider and connect to the Internet when you use an application that requests an online connection (as EndNote's *Online Search* command does). However, some setups require that you establish an online connection (sign on) *before* choosing EndNote's *Online Search* command.

Disconnecting: EndNote will not disconnect your Internet connection at any point. You need to shut down your connection when you have finished using EndNote's *Online Search* feature.

Open the Paleo Library

If EndNote is not already running, start it and open the Paleo library (Paleo.enl), as shown in Part I of the guided tour.

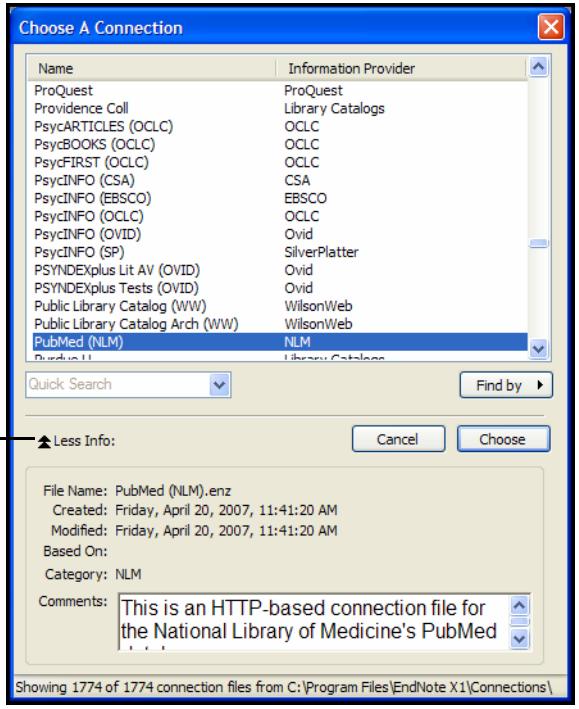
Connect to an Online Database

The first step in searching an online database is connecting to it, so that is how we will begin.

To connect to the PubMed Database:

1. With EndNote running, go to the *Tools* menu, select the *Online Search* submenu, and select *New Search*.

   (The *Online Search* menu will remember databases you have connected to in the past for easy access. You can also customize a list of favorite databases to search by using the Connection Manager. See page 175.)



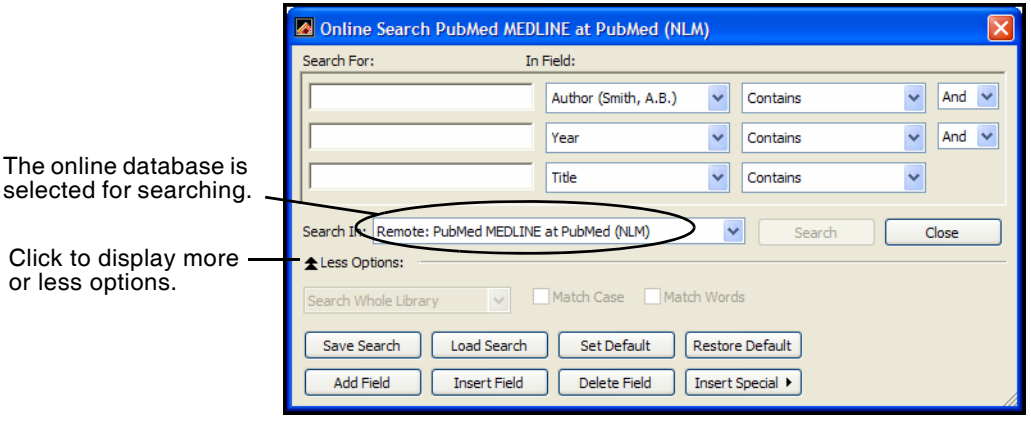
Click to show more or less info about the selected connection file.

NOTE: This window displays all of the connection files available in your Connections folder. Use the *Find by* button to quickly view various categories of databases to help you locate the one that you need. Or, type text into the Quick Search text box and press Enter.

2. Select the *PubMed* connection file (you can start typing the file name to quickly jump to it in the list), and click *Choose*.

By selecting that connection file, you have directed EndNote to connect to the National Library of Medicine's PubMed database. If for any reason the connection *cannot* be established, EndNote alerts you with an error message and closes the connection. See "Troubleshooting Connections" on page 613.

When the connection has been established, EndNote displays a Search window. Note that the search window is titled, "Online Search PubMed MEDLINE At PubMed (NLM)." The PubMed MEDLINE database is selected and EndNote is ready to search.



NOTE: If you previously set a default configuration for the Search window, the search field lists display the fields you selected as your defaults. If one of these fields appears italicized in the Search window lists, that indicates it is not a valid option for this particular online database.

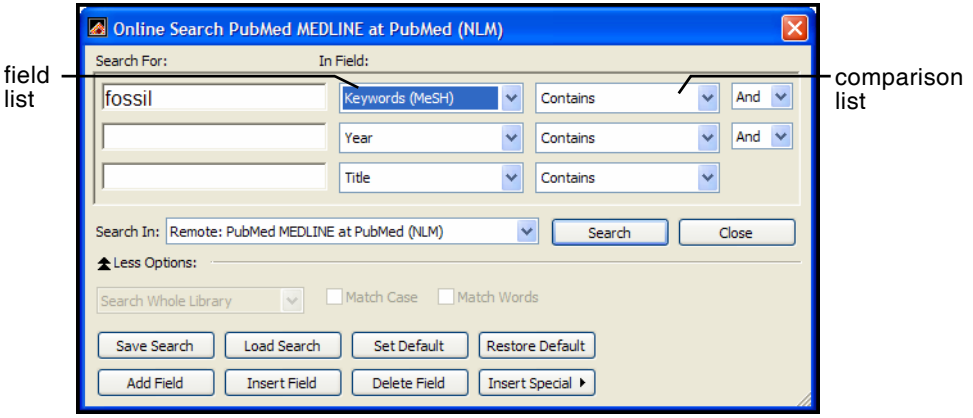
Search the Database

The next step is to enter the search term(s) to find the references you need. Searching an online database is very similar to searching an EndNote library, with a few exceptions. (See "Available Search Options" on page 179.)

Let's say you are interested in finding more information about fossils for the Paleo library.

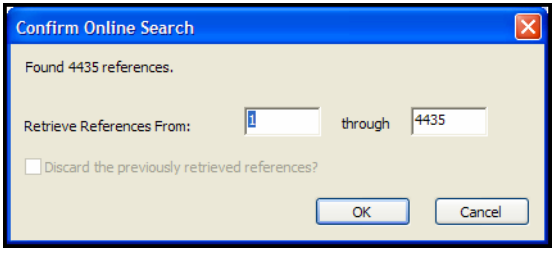
To enter the search term(s) and perform the search:

1. Enter "fossil" into the first search line and set the field list in that line to *Keywords (MeSH)*. The comparison list for online searches is always set to *Contains*.



2. Click *Search*.

   EndNote sends the search request off to the online database (PubMed, in this example), and a summary of the search results is displayed:



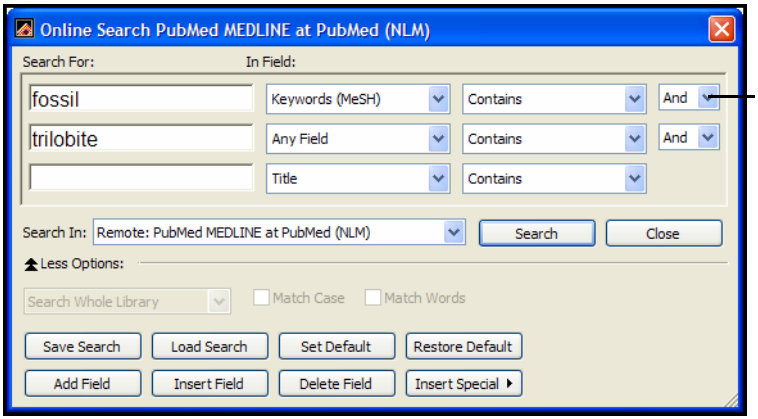
   The dialog displays the number of references that were found to match your search request, and gives you the option to retrieve them.

NOTE: PubMed is updated regularly, so you may find a different number of references than illustrated here.

   If the result set seems too big, you can always refine the search to get closer to exactly those references you want. Let's refine this search by looking for just those references that include mention of a "trilobite," a group of extinct marine animals that were abundant in the Paleozoic era.

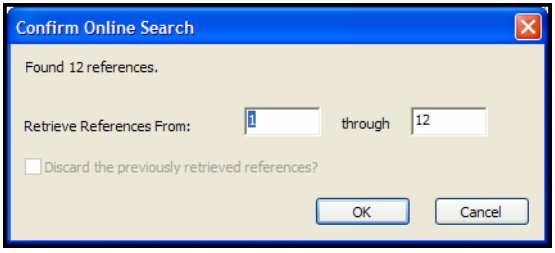
3. Click *Cancel*, and you are returned to the Search window.

4. Click in the second search line and type “trilobite”.
5. Verify that the field list for the second search line is set to *Any Field*.
6. Set the operator between the two search lines to *And*.



7. Click *Search*.

   This time only 12 references were found.

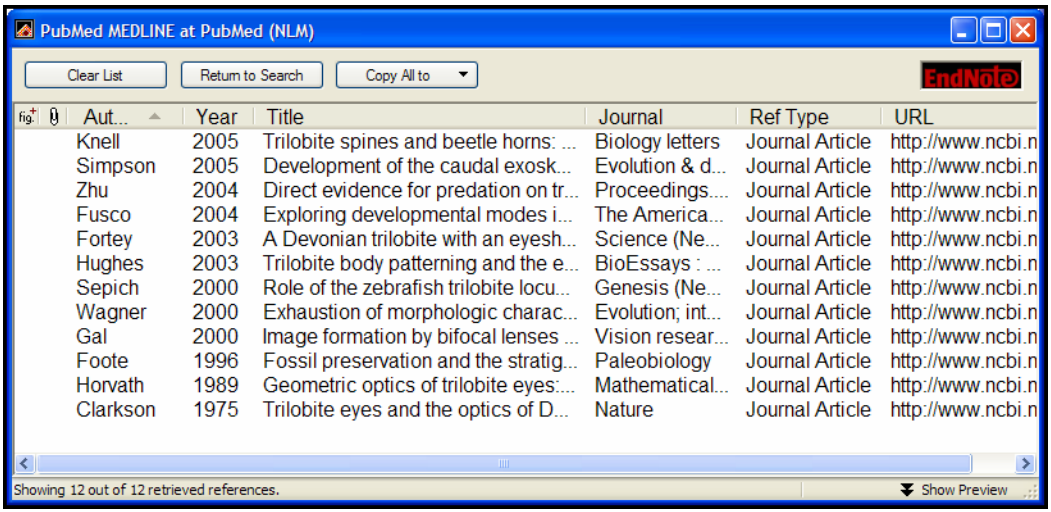


8. Click *OK* to retrieve the matching references.

   The references are downloaded and appear in a Retrieved References window for the PubMed database connection.

   You can halt a retrieval in progress by clicking the *Pause* button on the Retrieved References window, or by pressing the Escape key (ESC). The *Pause* button appears in the status line at the bottom of the window during record retrieval.

9. The Search window stays on top, and you can simply move it out of the way. We are finished searching for this tour, so *Close* the Search window.



You can drag the dividers between column headers to resize column widths.

NOTE: If you wanted to do another search of PubMed at this point, you could click *Return to Search*. Enter the new search strategy and click *Search*. On the Confirm Remote Search window, you are asked, "Discard the previously retrieved references?" You can either replace the current search results or add to them.

Save the References

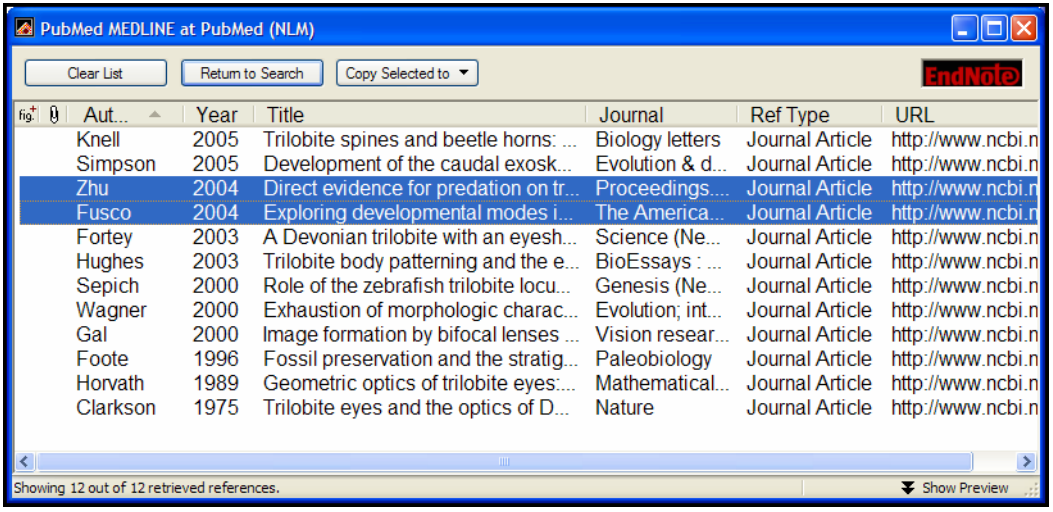
At this point you can peruse the retrieved references to see which ones you would like to keep. Save the references you want by transferring them into one of your own EndNote libraries.

The selected references can be copied to an open library using drag-and-drop or the *Copy* and *Paste* commands. You can also copy references directly to a library that is open, to a library that is closed, or to a new library using the *Copy All to or Copy Selected to* button, as described below.

For this example, we will save two of the retrieved references to EndNote's sample Paleo library.

To save your retrieved references:

1. Select two of the references displayed by holding down the CTRL key and clicking on the individual references. (SHIFT-click to select a range of references.)



2. Click the *Copy Selected to* button, and do one of these:

   - If the Paleo library is already open and appears in the list, select it.
   - Or, select *Choose Library*. In the file dialog that appears, go to the EndNote X1 folder, open the Examples folder, choose Paleo.enl, and click *Open*.

   The selected references that were retrieved from the PubMed database are copied to the selected library.

3. Close the Retrieved References window for PubMed.

   EndNote alerts you that the references in the Retrieved References window will be discarded.

4. Because you have already saved what you needed, you may click *OK* and close the window. You will be disconnected from PubMed.

This concludes the tutorial for using EndNote's *Online Search* command.

If you are finished working with EndNote for now, go to the *File* menu and choose *Exit* to close the EndNote program.

Related Sections

See these sections in the manual for information related to this portion of the tour:

- See Chapter 6 for details about establishing connections, searching for references, and retrieving references.
- Read "Selecting a Connection File" on page 173 to learn about the connection files that are available with EndNote.
- See "Troubleshooting Connections" on page 613 if you encountered any problems establishing a connection.
- See Chapter 17, "Connection Files" for information about creating and editing connection files.

Part V: Importing Reference Data into EndNote

Online searching, described in the previous section, is the easiest way to retrieve references from online databases, but not all information providers offer that option.

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.

In this part of the guided tour you will learn about:

- Downloading data in a tagged output format.
- Selecting an import filter and importing data into EndNote.

Open the Paleo Library

If EndNote is not already running, start it and open the Paleo library (Paleo.enl), as shown in Part I of the guided tour.

Search the Database and Save the References

Often when you search a database, the matching references are displayed as text, with no clear indicator between each piece of bibliographic information. The PubMed reference below, saved in a Citation format, is an example. There is no clear indicator for EndNote to be able to differentiate a title from an address or an abstract.

```
Am J Med Genet A. 2005 Mar 9; [Epub ahead of
print]

Reconstructing the behaviors of extinct
species: An excursion into comparative
paleoneurology.

Rogers SW.

    Salt Lake City VA-Geriatrics Research,
Education and Clinical Center and Department
of Neurobiology and Anatomy, University of
Utah School of Medicine, Salt Lake City, Utah.

   How can the behavior of an extinct species
be reconstructed-say a dinosaur such as
Allosaurus? Despite the relatively abundant
fossilized remains of this and other
dinosaurs, the incompleteness of the fossil
```

record has permitted room for considerable speculation, mythology, and perhaps a bit of unsettling reflection on what factors contributed to the eventual fate of these remarkably successful animals. (continued) (c) 2005 Wiley-Liss, Inc.

PMID: 15759265 [PubMed - as supplied by publisher]

To use this information effectively, each piece of bibliographic information must be consistently tagged so it can be directed to the correct EndNote field.

Database providers typically offer several different download formats. Regardless of which system you are searching, you need to save the references in a tagged format to a text file.

For this tour, we will use a text file of PubMed references that were previously downloaded in the tagged MEDLINE format. The file Pubmed-dinosaur.txt is provided in the EndNote Examples folder. A single reference in the file appears like this:

```
PMID- 15759265
OWN - NLM
STAT- Publisher
DA  - 20050310
PUBM- Print-Electronic
IS  - 1552-4825
DP  - 2005 Mar 9
TI  - Reconstructing the behaviors of extinct
      species: An excursion into comparative
      paleoneurology.
AB  - How can the behavior of an extinct species
      be reconstructed-say a dinosaur such as
      Allosaurus? Despite the relatively
      abundant fossilized remains of this and
      other dinosaurs, the incompleteness of
      the fossil record has permitted room for
      considerable speculation, mythology, and
      perhaps a bit of unsettling reflection on
      what factors contributed to the eventual
      fate of these remarkably successful
      animals. (continued) (c) 2005 Wiley-Liss,
      Inc.
```

```
AD  - Salt Lake City VA-Geriatrics Research,
      Education and Clinical Center and
      Department of Neurobiology and Anatomy,
      University of Utah School of Medicine,
      Salt Lake City, Utah.
AU  - Rogers SW
LA  - ENG
PT  - JOURNAL ARTICLE
DEP - 20050309
TA  - Am J Med Genet A
JID - 101235741
EDAT- 2005/03/11 09:00
MHDA- 2005/03/11 09:00
AID - 10.1002/ajmg.a.30538 [doi]
PST - aheadofprint
SO  - Am J Med Genet A 2005 Mar 9;.
```

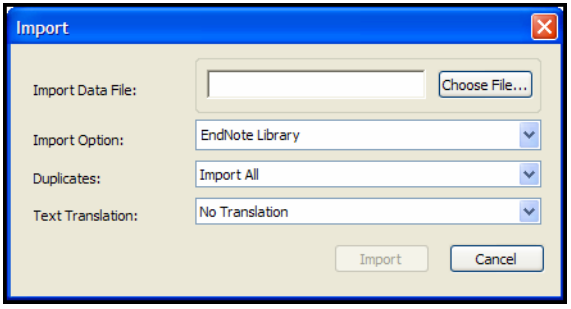
Each tag can be mapped to a corresponding EndNote field. If data is inconsistently tagged, or poorly delimited, it may not be possible to import all the data accurately.

Choose the Correct Import Filter and Import into EndNote

Once you have captured and saved your data file in a tagged format, you need to identify the proper EndNote filter to import the data. There are hundreds of filters included with EndNote; each one is designed to read a specific tagged format from a specific information provider.

To import the sample PubMed text file into the Paleo library:

1. Display the Paleo library window in EndNote.
2. From the *File* menu, choose *Import*.

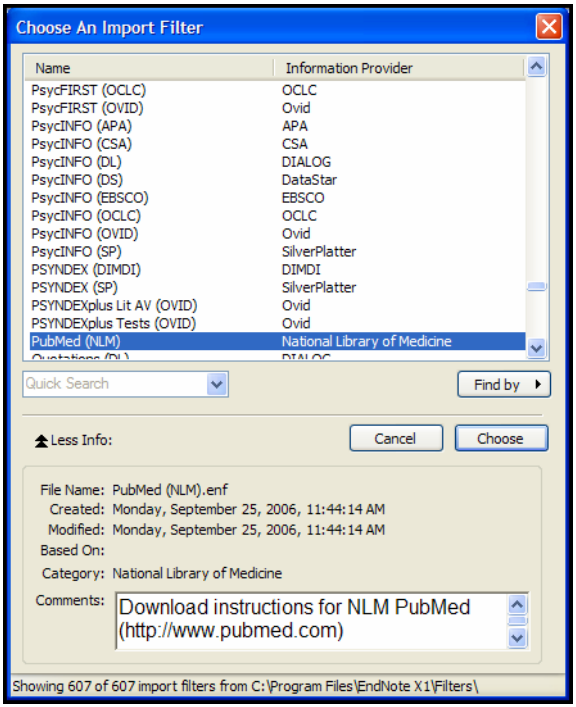


3. Click the *Choose File* button to display a file dialog.
4. Browse to the EndNote X1\Examples folder and then highlight and *Open* the Pubmed-dinosaur.txt file.

5. From the *Import Option* list, select *Other Filters* to display the list of filters supplied in the EndNote Filters folder.

   You may want to peruse the list, to get an idea of what filters are supplied. You can create new filters, copy existing filters, and edit filters.

6. Begin typing "PubMed" to jump to that filter in the list.



   Notice that the Comments section at the bottom of the window gives tips for downloading references from the selected source.

7. With the *PubMed (NLM)* filter highlighted, click *Choose*.

8. Leave the other two options at their default settings:

   Duplicates: Import All

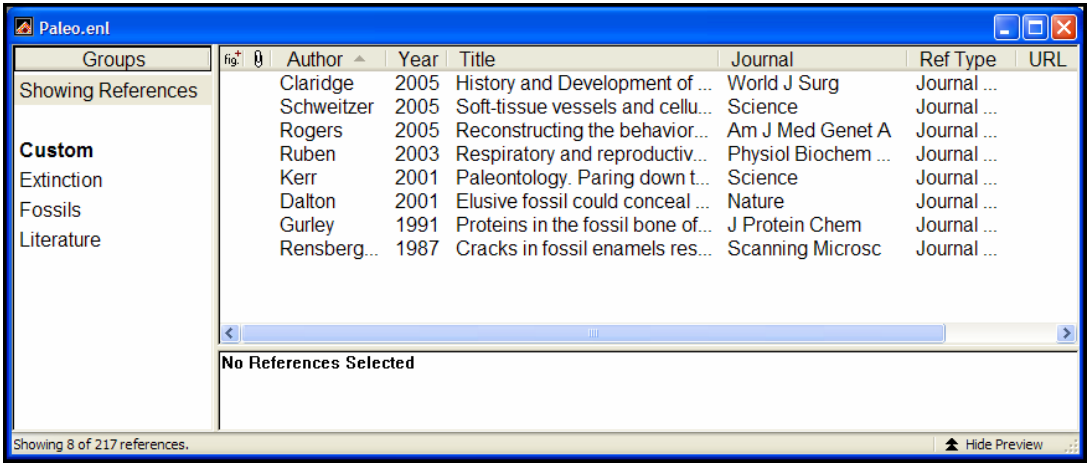
   By default, a reference is considered a duplicate if the Author, Year, Title, and Reference Type match a reference already in the library. You can change the duplicates criteria under EndNote Preferences. We will import all references regardless of duplicates.

Text Translation: No Translation

This option allows you to specify the text character encoding of the file you import. This is important when you import references in languages that include extended characters. You would typically contact your database provider for the appropriate setting.

9. Click *Import* to import the file.

   When the import is complete, only newly imported references display in the Library window. This is a good time to peruse the imported data to make sure it imported as expected.



   Notice that the All References group has changed to Showing References, and that the status line along the bottom of the window indicates that the window is "Showing 8 of 217 references."

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

Summary of Output Formats and Corresponding Import Options

A subset of supported information providers are listed with their recommended output formats in Appendix D under "Output Formats with Corresponding Import Options" on page 656. Check this list for guidance in order to download in the appropriate tagged format and select the appropriate import filter. You can also check our website at http://www.endnote.com for updated information and import filters.

Direct Export from Web Pages

Certain websites 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. For a list of systems that provide a direct export of references into EndNote, see "Direct Export Formats" on page 647 of Appendix D. The list keeps growing, so contact your information providers to find out whether they participate!

This concludes the tutorial for using EndNote's *Import* command.

If you are finished working with EndNote for now, go to the *File* menu and choose *Exit* to close the EndNote program.

Related Sections

See these sections in the manual for information related to this portion of the tour:

- See Chapter 7, "Importing Reference Data into EndNote," for details about import options and about importing references from other bibliographic software programs.
- Read Chapter 16, "Filters," to learn how to create or modify filters that map downloaded references to corresponding fields in EndNote. You can enter tags and map them to specific EndNote fields.
- See Appendix D, "Direct Export Formats and Import Formats," for detailed tables of instruction for importing reference data from various online systems.

Part VI: Searching an EndNote Library and Previewing a Bibliography

In this part of the guided tour you will learn how to:

- Search an EndNote library for a subset of references.
- Preview a bibliography in EndNote.

In this part of the tour, you will search for a set of related references and preview them formatted in a bibliographic style.

Open the Paleo Library

If EndNote is not already running, start it and open the Paleo library (Paleo.enl), as shown in Part I of the guided tour.

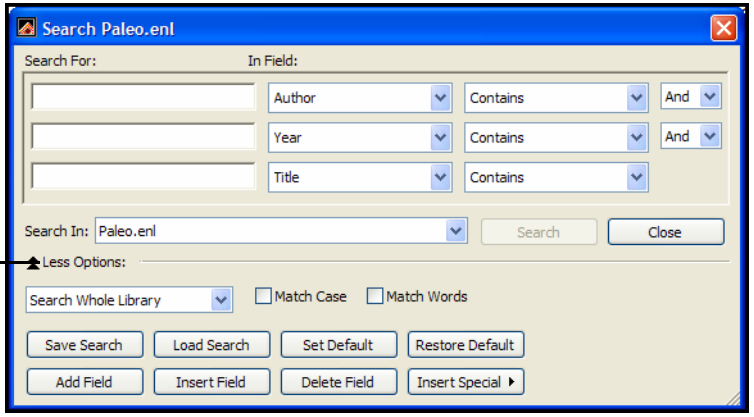
Search for a Set of References

Let us assume that you want to generate a list of all references found in the Paleo library that are about extinction and that were published from 1990 to 1999.

To search for references:

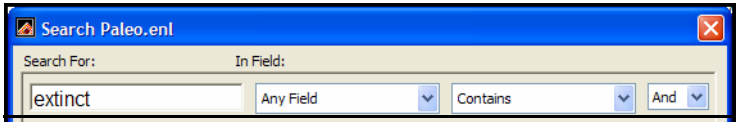
1. From the *References* menu, choose *Search References* (CTRL+F).
2. If the *More Options* button is available, click it to display more search options.

toggles between *More Options* and *Less Options*



3. On the first search line:
   a. Type `"extinct"` as the first **search term**.
   b. In the first drop-down list, the **field list**, select *Any Field*. This means that EndNote will find references that have the string "extinct" in any field.

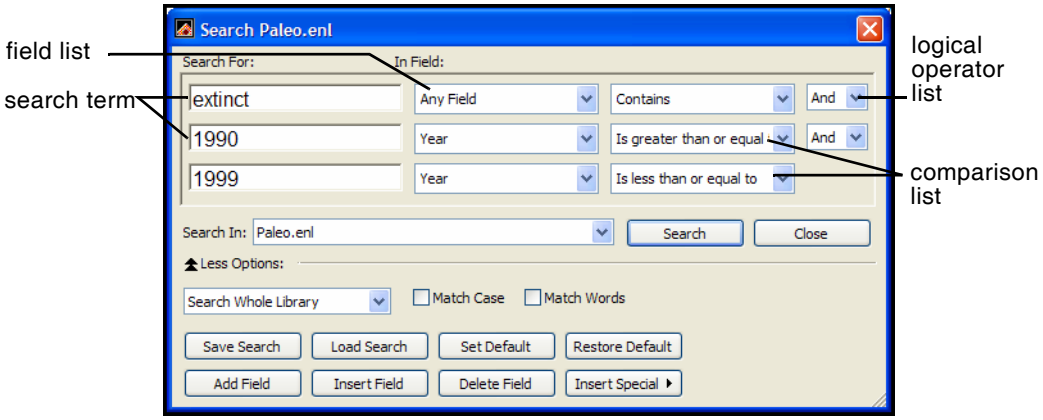
c. In the next drop-down list, the **comparison list**, the *Contains* comparison operator means that EndNote will search for this string of text anywhere in the field.



Next, set up the search to find references dated from 1990 to 1999.

4. Type `1990` as the search term for the second search line. From the **field list** in the second search line, choose *Year*; and from the **comparison list**, choose *Is greater than or equal to*.
5. If you do not have a third search line available, click the *Add Field* button found along the bottom of the window. You can also click and drag the bottom right corner of the window to size it larger or smaller.
6. Type `1999` as the search term for the third search line. From the **field list** in the third search line, choose *Year*; and from the **comparison list**, choose *Is less than or equal to*.
7. Notice the "And, Or, Not" logical operator list at the end of each search line. Select the "And" logical operator between the three search lines.

   Your search window should look like this:



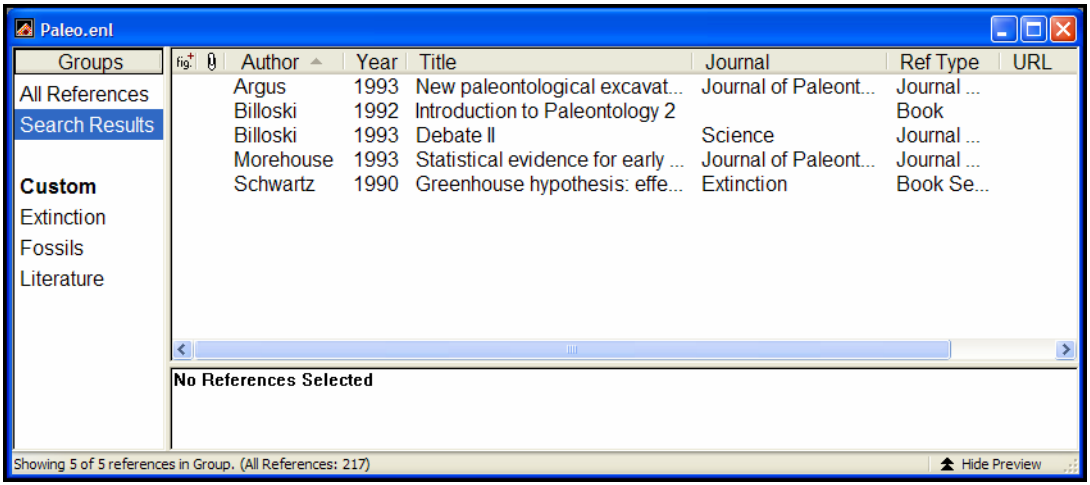
This search will find all references containing the text "extinct" that also were published between 1990 and 1999.

Notice that the following check boxes are not selected for this search:

Match Case: This option would limit our search to "extinct" in lowercase. If it were found capitalized at the beginning of a sentence, or all uppercase, it would not match the search.

Match Words: This option would limit matches to full words, with no truncation. The word "extinction" would not match our search.

8. Click the *Search* button to begin the search. In a moment, EndNote displays the search results.
9. Close the Search window.



The status area at the bottom of the Library window should read, "Showing 5 of 5 references in Group."

Notice in the Groups pane that these search results are automatically retained in a Search Results group. This makes it easy to display other sets of references, but still go back and display your most recent search results. This temporary Search Results group will be replaced the next time you run a search on the library. When you close the library, this group is removed.

You may want to click the Author column heading to sort the found references by author name.

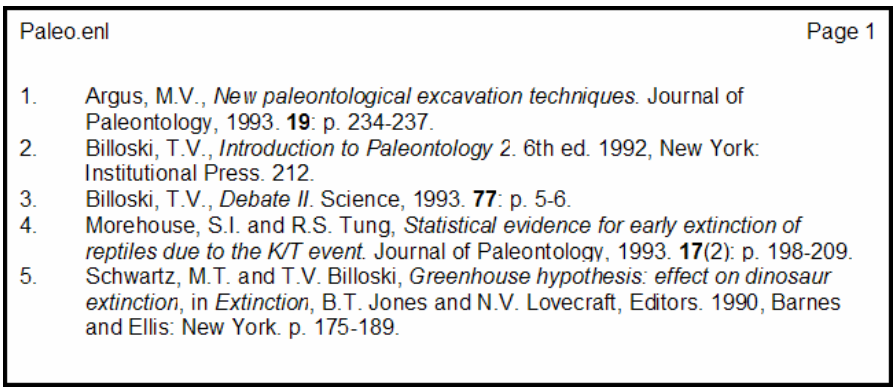
Now that you have located all of the desired references, you are ready to preview them.

Preview the Found References

In order to format your references, you need to select a output style. Styles determine how your references look when you print, export, preview, or create bibliographies.

To preview the bibliography:

1. On the Main toolbar, select an output style from the output style list. For this example, choose the *Numbered* style.
2. If you want to further limit the references to preview, select (highlight) those references you want to include. To select all references in the list, first click in the list, then go to the *Edit* menu and choose *Select All*.
3. From the *File* menu, choose *Print Preview* to display the bibliography on your computer screen.


Paleo.enl Page 1

1. Argus, M.V., *New paleontological excavation techniques*. Journal of Paleontology, 1993. **19**: p. 234-237.
2. Billoski, T.V., *Introduction to Paleontology 2*. 6th ed. 1992, New York: Institutional Press. 212.
3. Billoski, T.V., *Debate II*. Science, 1993. **77**: p. 5-6.
4. Morehouse, S.I. and R.S. Tung, *Statistical evidence for early extinction of reptiles due to the K/T event*. Journal of Paleontology, 1993. **17**(2): p. 198-209.
5. Schwartz, M.T. and T.V. Billoski, *Greenhouse hypothesis: effect on dinosaur extinction*, in *Extinction*, B.T. Jones and N.V. Lovecraft, Editors. 1990, Barnes and Ellis: New York. p. 175-189.

4. You can use the buttons along the top of the window to walk through the pages of the bibliography.
5. When you are done previewing, click the *Close* button.

You may want to return to the full list of references in the Paleo library. To show all references again in the library window, click on the *All References* group.

This concludes Part VI of the guided tour. Part VII demonstrates how to write a paper and cite references and figures in Microsoft Word.

If you are finished working with EndNote for now, go to the *File* menu and choose *Exit* to close the EndNote program.

Related Sections

See these sections in the manual for information related to this portion of the tour:

- More information about searching the EndNote library and saving references in groups can be found in Chapter 8, "Searching in EndNote and Using Groups."
- Read Chapter 12, "Creating an Independent Bibliography," about creating reference lists directly from your EndNote library, including printing your bibliography and saving your bibliography to an RTF file.
- See Chapter 15, "Bibliographic Styles," for information about modifying and selecting styles.

Part VII: Using EndNote While Writing a Paper With Microsoft Word

NOTE: Continue with this part of the tour only if you use Microsoft Word 2000, XP, 2003, or 2007. If you use a different word processor, or if you have an older version of Word, turn to Chapter 11 to learn how to cite EndNote references and create bibliographies in your papers.

EndNote's Cite While You Write feature inserts EndNote commands into Word's *Tools* menu (or on an EndNote tab in Word 2007) to give you direct access to your references while writing in Microsoft Word. The Cite While You Write commands enable EndNote to do bibliographic formatting to the document that is currently open in Word.

In this part of the guided tour, you will learn how to:

- Insert EndNote bibliographic citations into your paper and create a bibliography.
- Edit citations to suppress author names and add cited pages.
- Insert EndNote figure citations into your paper. (This section uses the figure reference that was inserted while following Part III of the guided tour.)

Open the Paleo Library

If EndNote is not already running, start it and open the Paleo library (Paleo.enl), as shown in Part I of the guided tour.

EndNote will look for matching references in the currently open libraries. While EndNote can start and open your default library when needed by Word, opening the library first assures you that you are citing references from the appropriate library.

Open a Microsoft Word Document

For this tour, start Microsoft Word and open a new document.

While we are not using one for this tour, EndNote does include manuscript templates that make it easy to set up your paper for electronic submission to a publisher. 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, font type and size, etc. For more information about using manuscript templates, see "Using Predefined Manuscript Templates" on page 275.

Cite EndNote References

You are going to start entering text and citations. For this tour, you are going to enter minimal information.

To start writing your paper and inserting citations:

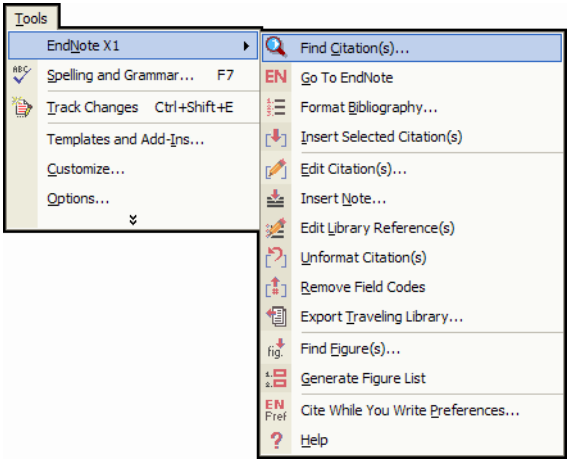
1. Enter text as though you were writing your paper:

   ```
   The fossil in question was generally
   regarded to be the 220 million year-old
   remains of tyrannosaurus. Several years ago,
   however, Morehouse overturned this hypothesis
   with the discovery of yet another species.
   ```

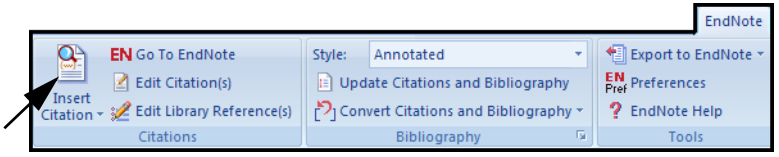
   Now you are ready to insert a citation.

2. From the *Tools* menu, go to the *EndNote X1* submenu and then *Find Citation(s)*. **Word 2007**: On the EndNote tab, in the Citations group, click the *Insert Citation* icon.

   Word 2000, XP, or 2003 *Tools* > *EndNote X1* submenu

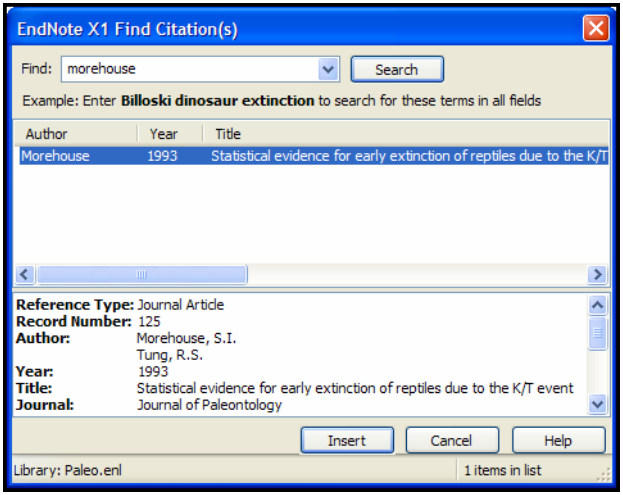


   Word 2007 *EndNote* tab



3. The EndNote Find Citations dialog appears. Type the author name "Morehouse" in the "Find" box and click *Search*.

EndNote lists the matching references. In this case, a single reference matches the search.



4. Click *Insert* to insert the selected reference as a citation. There may be a delay the first time Word communicates with EndNote for the document.

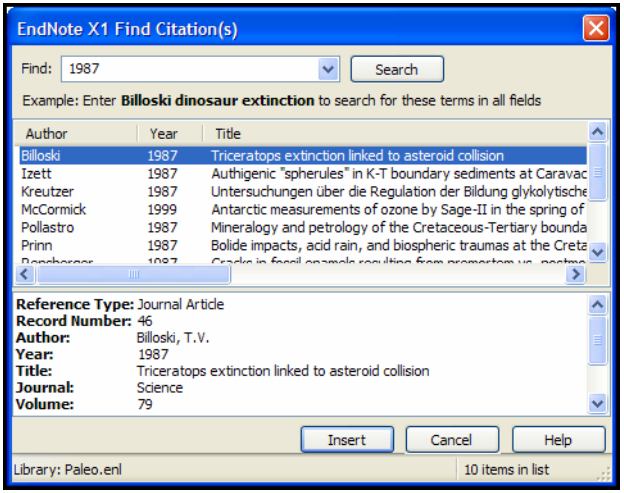
   EndNote not only inserts a citation, but Instant Formatting formats the citation in the currently selected *Numbered* style and adds it to a formatted bibliography at the end of the paper.

5. Add more text to the paper:

   ```
   It is now the undisputed progeny of the
   species at hand.
   ```

6. From the *Tools* menu, go to the *EndNote X1* submenu and then *Find Citation(s)*. **Word 2007**: On the EndNote tab, in the Citations group, click the *Insert Citation* icon.

7. Type the number "1987" into the find box and click *Search*. EndNote searches all fields and lists the matching references.



8. Scroll down the list of matching references, select the reference by the author Turnhouse, and click *Insert*.

   EndNote inserts the citation, and Cite While You Write technology formats it and adds it to the bibliography at the end of the paper.

   Your document text should now look like this:

> The fossil in question was generally regarded to be the 220 million year-old remains of tyrannosaurus. Several years ago, however, Morehouse overturned this hypothesis with the discovery of yet another species. [1] It is now the undisputed progeny of the species at hand. [2]
>
> 1. Morehouse, S.I. and R.S. Tung, *Statistical evidence for early extinction of reptiles due to the K/T event*. Journal of Paleontology, 1993. **17**(2): p. 198-209.
> 2. Turnhouse, M.B., *Role of 14C dating in paleontology*. Journal of Paleontology, 1987. **75**(6): p. 11-15.

NOTE: You can shade each of the Cite While You Write citation and bibliography fields so they are easy to locate. This is set with Microsoft Word's Field Shading option. The shading is for on-screen help only, and does not print.

9. Assume that you have finished inserting citations in your paper. From Word's *File* menu, choose *Save* to save your document. **Word 2007**: Click the Office icon and select *Save*.

NOTE: You can also insert citations in footnotes. First, use the appropriate Word command to create the footnote. Then, insert the EndNote citation in the footnote. Word controls the placement and numbering of the footnote, and EndNote formats the citation based on the current style. You must select a style that formats footnotes; for example, Chicago 15th A.

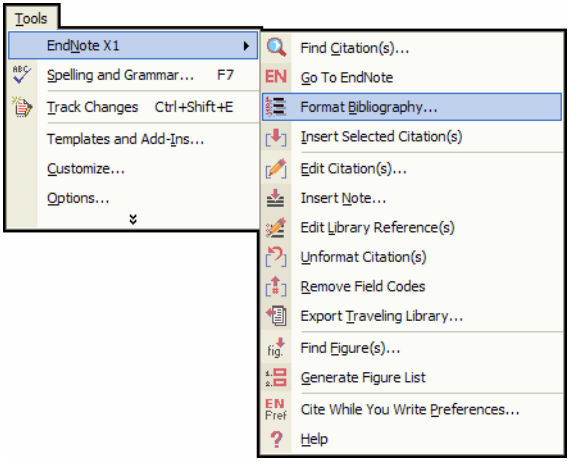
Select a Bibliographic Style

You can format your citations and bibliography as many times as you like, changing the output style and various other layout settings each time.

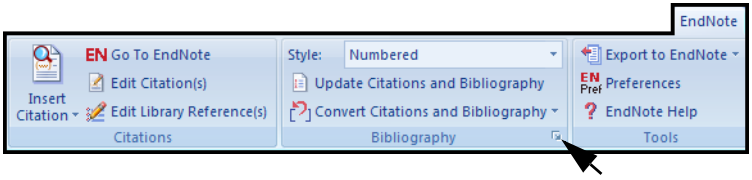
To select the bibliographic style used for formatting:

1. From Word's *Tools* menu, go to the *EndNote X1* submenu and choose *Format Bibliography*. **Word 2007**: on the EndNote tab, in the Bibliography group, click the bottom corner arrow.

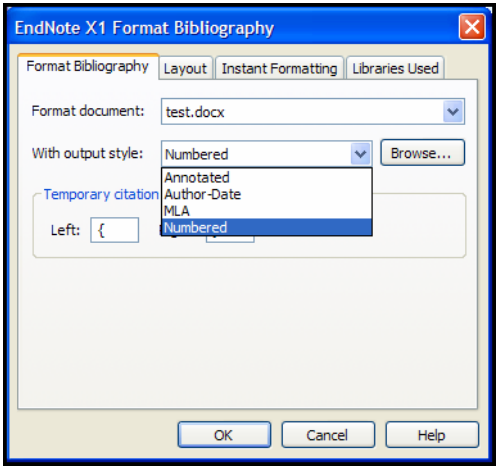
Word 2000, XP, or 2003 *Tools* > *EndNote X1* submenu



Word 2007 *EndNote* tab



A Format Bibliography dialog appears, where you can select a bibliographic style.



Styles contain instructions for how EndNote will format citations and the bibliography. For the previous example, we illustrated the Numbered style, which sequentially numbers citations and then inserts a numbered reference list at the end of the paper.

As you can see, there are many other formatting options available here; you can make changes that override the settings in the current output style.

2. For this example, click the *Browse* button next to "With output style" to display the list of output styles supplied with EndNote.
3. Select the *APA 5th* style and click *OK*.
4. Click *OK* to leave the Format Bibliography dialog.

   EndNote automatically updates the existing citations and regenerates the bibliography in the APA style.

In the future, if you need to make changes to the paper such as adding or deleting citations or text, just do the necessary updates in your paper. If you want to change the output style or bibliography layout settings, choose the *Format Bibliography* command again. EndNote will reformat the in-text citations and generate a new bibliography based on your changes.

NOTE: More than 2,800 styles are installed in EndNote's Styles folder. To see a list of them organized by discipline, choose *Output Styles* from the *Edit* menu in EndNote and select *Open Style Manager*.

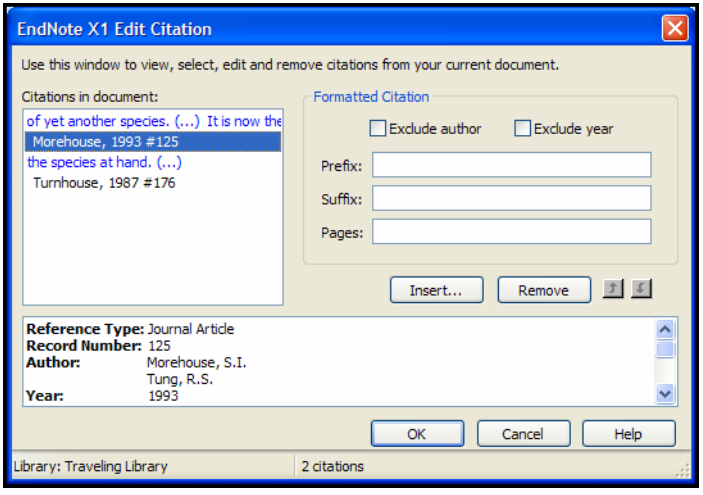
Edit a Citation

If you directly edit a citation or the bibliography, the changes will be lost when you *Format Bibliography* again because EndNote reformats according to the rules of the selected output style. To make and retain changes to all citations and/or the bibliography, modify the output style. However, if you want to make a change to an individual citation, use the *Edit Citation* command as described below.

For some bibliographic styles, the majority of references are cited in an "Author, Date" format; but if the author's name is mentioned within the paragraph text, the style dictates that the name not be repeated in the citation. In our example, we mention Morehouse within the text of the paper, so we will remove the author's name from the citation. We also want to add a page reference to this particular citation.

To edit an individual citation:

1. Click anywhere on the Morehouse citation.
2. From the *Tools* menu, go to the *EndNote X1* submenu and then *Edit Citations*. **Word 2007**: On the EndNote tab, in the Citations group, select *Edit Citations*.



3. In the Formatted Citation section, select the *Exclude Author* box.

4. Next to *Pages*, type "34-35".

NOTE: Typing cited page numbers in this box does not guarantee that they will appear in your citation. You must use an output style that lists the "Cited Pages" field in the Citation template. You can edit any style to include this special field.

5. Click *OK* to update the citation in your paper.

> The fossil in question was generally regarded to be the 220 million year-old remains of tyrannosaurus. Several years ago, however, Morehouse overturned this hypothesis with the discovery of yet another species. (1993, pp. 34-35) It is now the undisputed progeny of the species at hand. (Turnhouse, 1987)
>
> Morehouse, S.I. & Tung, R. S. (1993). Statistical evidence for early extinction of reptiles due to the K/T event. *Journal of Paleontology*, *17*(2), 198-209.
> Turnhouse, M. B. (1987). Role of 14C dating in paleontology. *Journal of Paleontology*, *75*(6), 11-15.

Insert Figure Citations

Next you are going to insert two figure citations—one inserted and numbered as a figure, and one inserted and numbered as a table. This section uses the reference inserted in Part III of the guided tour as well as another reference in the Paleo library.

All figure citations are inserted in the same way; the EndNote reference type determines whether it is inserted and numbered as a figure or a table. Images found in the *Chart or Table* reference type are inserted as tables, while images found in any other reference type are inserted as figures.

To find and insert figure citations:

1. First, add more text to your paper:

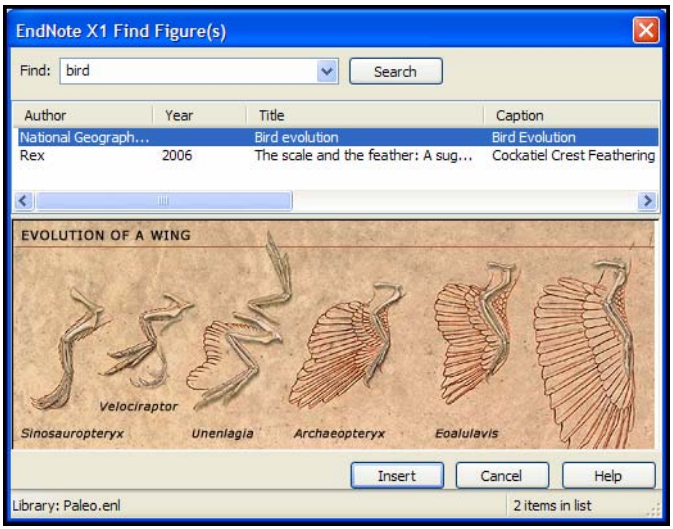
   ```
   As researchers look at evidence, even the
   crest on the modern cockatiel provides insight
   into the evolution of feathers.
   ```

   Now you are ready to insert a figure citation.

2. From the *Tools* menu, go to the *EndNote X1* submenu and then *Find Figure(s).* **Word 2007**: On the EndNote tab, in the Citations group, click on the *Insert Citation* text and select *Find Figure*.

The EndNote Find Figures dialog appears.

3. Type the search term "bird" in the "Find" box and click *Search*.



EndNote lists only references that match the search text *and* contain an image. As you highlight a reference, the graphic stored within the reference is displayed below the reference list. (Object files display a file icon.)

You can use your mouse to move the column dividers to set column widths and to drag the lower right corner of the window to adjust the size of the window.

4. Select the reference with the Caption "Cockatiel Crest Feathering," a reference inserted earlier in this guided tour, and click *Insert* to insert the figure citation.

> As researchers look at evidence, even the crest on the modern cockatiel provides insight into the evolution of feathers. (Figure 1)

5. Next enter the text:

   ```
   While exploring the evolution of dinosaurs and birds, it is interesting to also explore a parallel time line of extinctions.
   ```

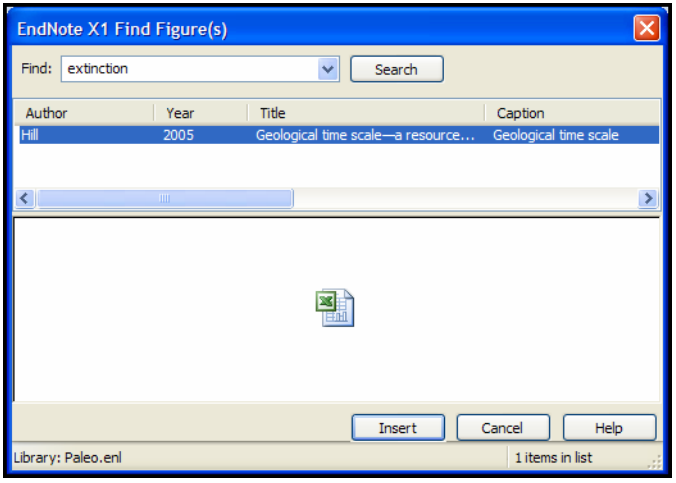
   Now you are ready to insert a reference to a Microsoft Excel file that was saved in the Figure field of an EndNote reference that uses the *Chart or Table* reference type.

6. From the *Tools* menu, go to the *EndNote X1* submenu and then *Find Figure(s)*. **Word 2007**: On the EndNote tab, in the Citations group, click on the *Insert Citation* text and select *Find Figure*.

   The EndNote Find Figures dialog appears.

7. Type the text "extinction" in the "Find" box and click *Search*.

   EndNote displays a single matching reference. The file attachment icon shows that the figure is in a Microsoft Excel document.



8. Click *Insert* to insert the citation. (It may take some time for Word to import the file.)

   The image was found in the *Chart or Table* reference type, so it was added to Word and numbered as a table.

> As researchers look at evidence, even the crest on the modern cockatiel provides insight into the evolution of feathers. (Figure 1)
>
> While exploring the evolution of dinosaurs and birds, it is interesting to also explore a parallel time line of extinctions. (Table 1)

9. Scroll to the end of the document, and you will find that EndNote used Word bookmarks to place the images under labeled List of Tables and List of Figures sections as defined by the APA style.

10. You may want to resize your figures to fit on the page appropriately. Click on an image, and then hold down the

Shift key while you drag a corner of the figure to resize it proportionally.

List of Tables

Table 1.

Geological time scale

Eon	Era	Period	begin - end (Mya)
Phanerozoic Eon: PH	Cenozoic Era: CZ	Neogene N	23.0 - 0.00
		Paleogene E	65.5 - 23.0
	Mesozoic Era: MZ	Cretaceous K	146 - 65.5
		Jurassic J	200 - 146
		Triassic T	251 - 200
	Paleozoic Era: PZ	Permian P	299 - 251
		Carboniferous C	359 - 299
		Devonian D	416 - 359
		Silurian S	444 - 416
		Ordovician O	488 - 444
		Cambrian Є	542 - 488
Proterozoic PR	Neoproterozoic NP		1000 - 542
	Mesoproterozoic MP		1600 - 1000
	Paleoproterozoic PP		2500 - 1600
Archean AR	Neoarchean NA		2800 - 2500
	Mesoarchean MA		3200 - 2800
	Paleoarchean PA		3600 - 3200
	Eoarchean EA		3800 - 3600
Hadean HA	Early Imbrian EI		3850 - 3800
	Nectarian NC		3950 - 3850
	Basin Groups BG		4150 - 3950
	Cryptic CY		- 4150

11. You can also reduce the size of the Cockatiel Crest Feathering graphic.

List of Figures



Figure 1. Cockatiel Crest Feathering

As you are working, remember to often *Save* your document. You can continue adding text, bibliographic citations, and figure citations to the paper, and EndNote will continue adding to the lists of references, figures, and tables!

This completes the guided tour. Exit Microsoft Word by choosing *Exit* from the *File* menu.

To close the EndNote program, go to the *File* menu in EndNote and choose *Exit*.

Related Sections

See these sections in the manual for information related to this portion of the tour:

- The process of citing references and figures and creating bibliographies with Cite While You Write is covered in Chapter 10.
- More than 2,800 styles are installed in EndNote's Styles folder. To see a list of them organized by discipline, choose *Output Styles* from the *Edit* menu and select the *Style Manager*. See "Accessing Styles in Other Places" on page 411 for information about how to access other styles.
- Chapter 15, "Bibliographic Styles," includes instructions for editing output styles.

Chapter 4
The EndNote Library

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About the EndNote Library

An EndNote **library** is a collection of references, each containing the information required to create a bibliography. Additional information such as keywords, notes, and abstracts can also be stored in these references. This chapter provides an overview of the EndNote library, including instructions for opening and creating libraries, and navigating within a 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 main 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 Macintosh versions of EndNote can be used by the Windows version of EndNote, and vice versa (see page 119 for more information on transferring libraries across platforms).
- Each library can be independently moved, copied, renamed or deleted using the Windows Explorer (or by opening "My Computer").

  Figures and other significant files are stored in a [library name].DATA folder which is in the same folder as your primary 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 primary 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 list. By default, the first column shows a *fig.* heading for references that include an attached graphic or file in the Figure field. The second column displays a paper clip icon for references that include attached files 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, and the URL are displayed for each reference. You can change the displayed fields with the *Display Fields* preference.

Back Up Your Libraries

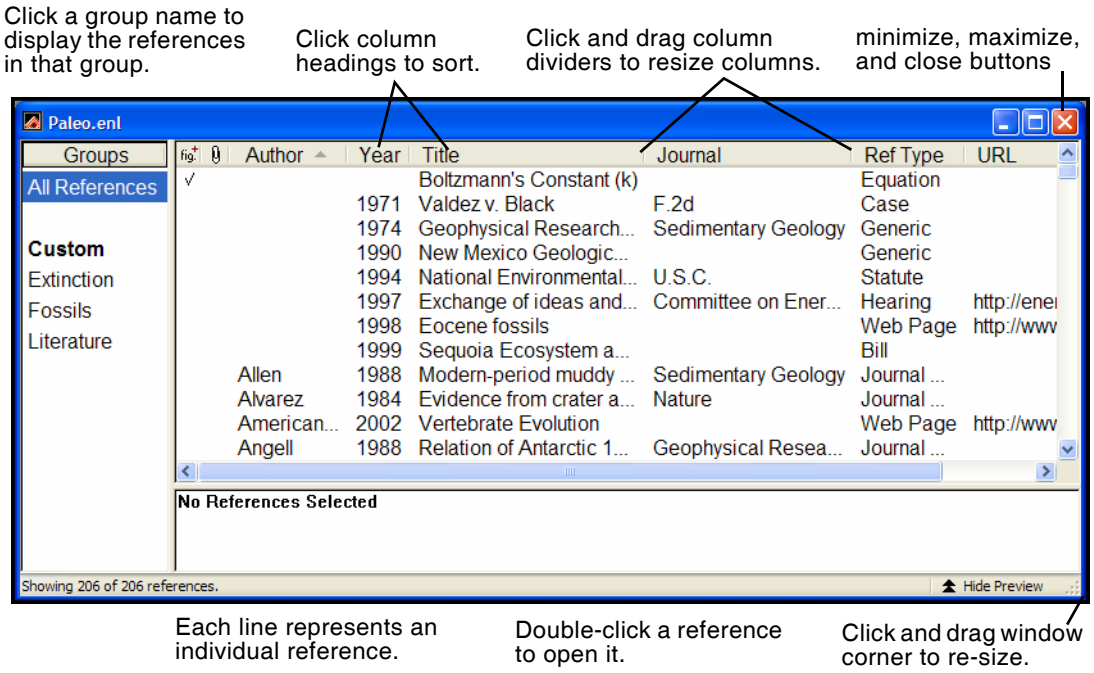
Your EndNote library becomes increasingly valuable to you as you add references to it. Consequently, it is imperative that you back up your libraries, along with any other important documents. Remember to also back up the corresponding .DATA folder, which is part of the library.

You can use the *Save a Copy* command to save a copy of your library to a removable disk (or elsewhere) for safe keeping. See Appendix A for more information about making backup copies of your files.

The Library Window

When you first open a library with EndNote, you see a **Library window** showing the references you have entered. Each reference is displayed on a single line, showing first a *fig.* heading if a graphic or file is attached to the Figure field in a record, then 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, and finally the URL.

The left pane of the window may list various groups of references for easy retrieval. In a new library, only the All References group is listed.



Navigating in the Library Window

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

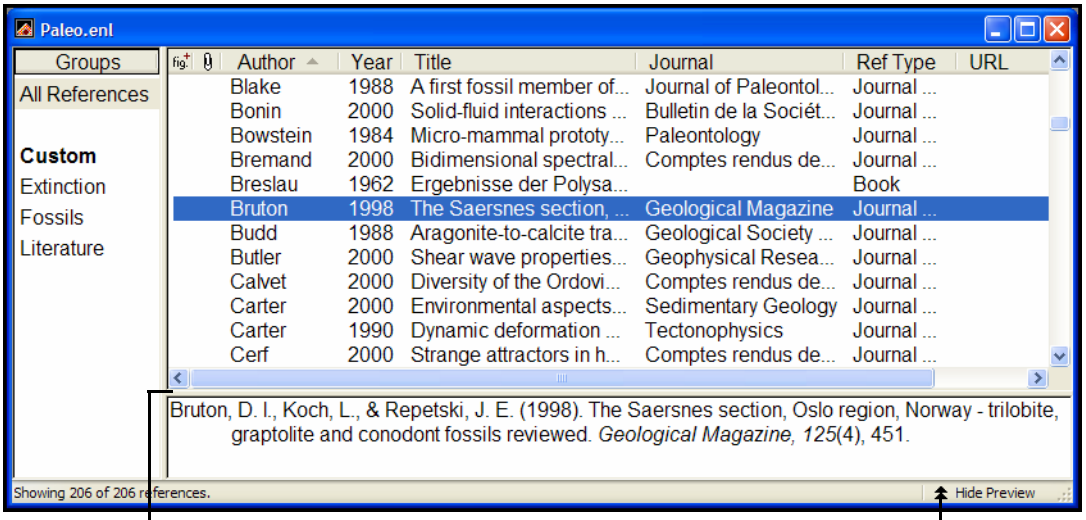
- Scroll through the list of references in the Library window by clicking in the vertical scroll bar with the mouse.
- The ↑ and ↓ keys move up or down from the currently selected reference, or if nothing is selected they select the last or first reference in the library, respectively.
- You can quickly 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 Paleo 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.

- The 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 References* from the *References* menu. (See Chapter 8 for more information.)

Showing a Reference Preview

Click the *Show Preview* option at the bottom of the Library window to hide or display the preview pane. (Click the triangle next to the words "Show Preview.") Once the preview is showing, the command changes to *Hide Preview*; clicking that option hides the preview pane. You could also select *Show Preview /Hide Preview* from the *Tools* menu.



Click and drag to change the height of the preview pane.

Click to show/hide the preview pane.

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.

NOTE: If the font specified in the selected output style does not support italics, any italics will display as plain text.

Choosing the Current Style

Since the preview uses the current style, it's important to know how to set 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 two thousand 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 about using the Style Manager, see "The Style Manager" on page 404.)

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

Resizing the Preview Pane

To change the height of the preview pane, click on the bar that separates the preview from the rest of the Library window, 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.)

Previewing Multiple References

The preview pane only displays a preview for 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 such that the main window displays bibliographic data (such as author, year, title, and journal), and the preview pane 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 configure the display of the Library window fields, see "Changing Display Fields" on page 102. 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 page 361).

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

Showing Groups (Subsets) of References

Groups are subsets of references saved for easy retrieval. The left pane of the library window lists two types of groups. The first type is automatically created, and cannot be changed. To display a group, click on the group name.

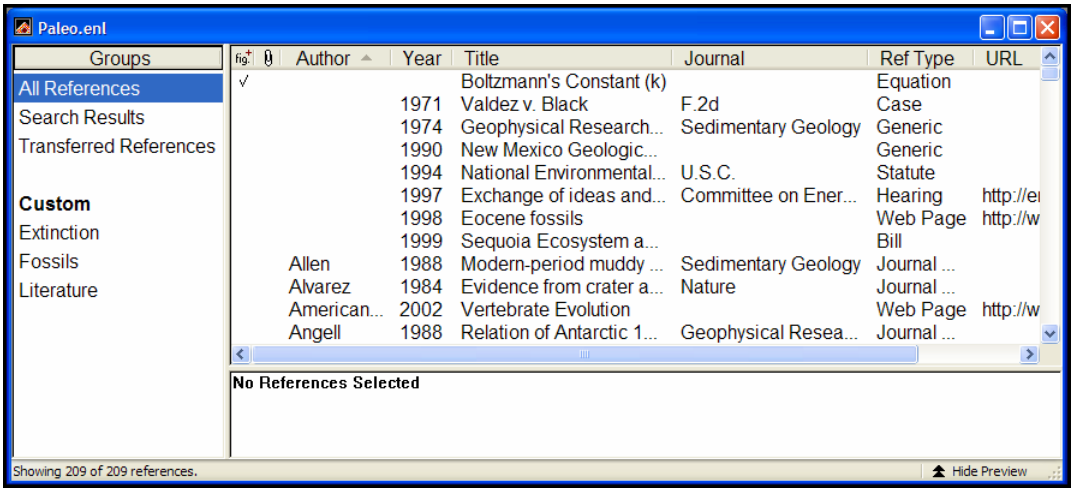
The automatic groups include:

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.

Search Results: This temporary group displays the most recent search results. Each time you run another search on the library, this group is replaced. When you close the library, the group is deleted. (Only the group is deleted; the references are still in the library.)

Transferred References: This temporary group displays the last set of references transferred into the library from EndNote Web.

When you close the library, the group is deleted. (Only the group is deleted; the references are still in the library.)



Any additional groups appear under a *Custom* heading and are user defined. You can create up to 50 custom groups in a library, and easily drag and drop references to and from groups.

See "Using Groups" on page 234 for more detailed information about saving references in groups.

Resizing the Library Window

Like most windows in EndNote, you can resize the Library window 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 right corner of the Library window.

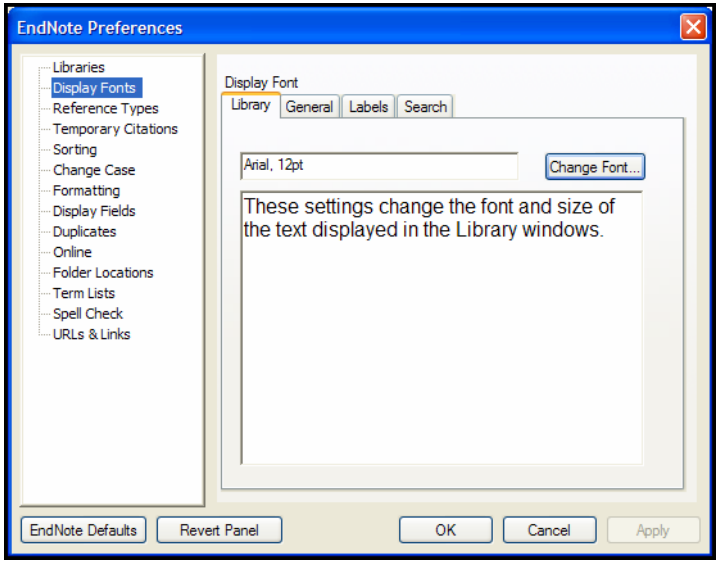
EndNote remembers the new size of the Library window as well as its location on the screen so the next time you open it, the library appears with the same dimensions and in the same location as when you last closed it. Each EndNote library can have its own unique dimensions and screen location.

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 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 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 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.

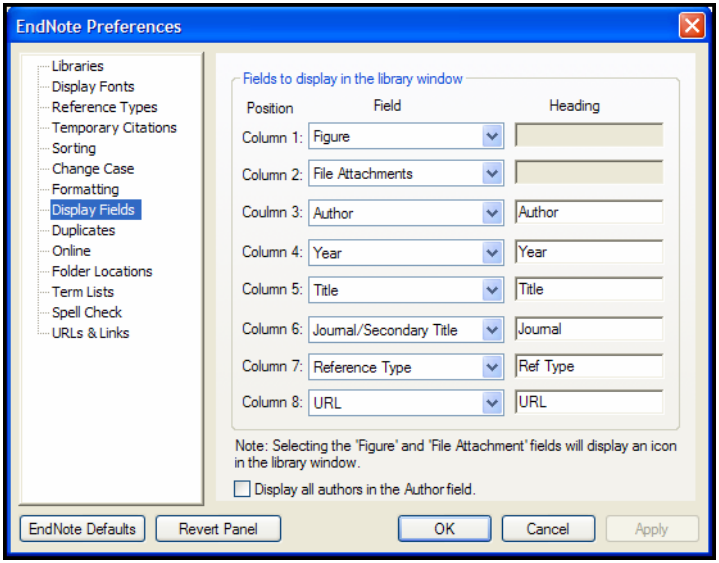
Changing Display Fields

In the Library window, EndNote defaults to showing first a *Fig.* heading if a graphic or file is attached to the Figure field in a reference, then a paper clip icon if a file is attached to the File Attachments field, and then the Author, Year, Title, Journal Name or Secondary Title, reference type, and URL fields. 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.

These settings apply to all libraries.

To customize the Library window display:

1. From the *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. You must select at least one field for display in order to save your changes.
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. Click *OK* to save the changes and close the dialog.

The Library Window Sort Order

The references listed in the Library window are automatically sorted by the first author's last name and first initial, the year, and the order in which they were entered (the record number). This sort order can be changed by choosing *Sort References* from the *References* menu (see "Sorting the Library" on page 232) 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, all alphabetical sorting is carried out according to the language and locale settings of your operating system—unless you specify a different language in the *Sort Options* dialog.

The library sort order is in effect only when the library is showing all of the references. 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: "Sort Order: Bibliographies and Multiple Citations" on page 446 describes how to set the sort order for a bibliographic style. See "Sorting" on page 526 for information about having EndNote ignore certain words or names when sorting references.

Creating Libraries

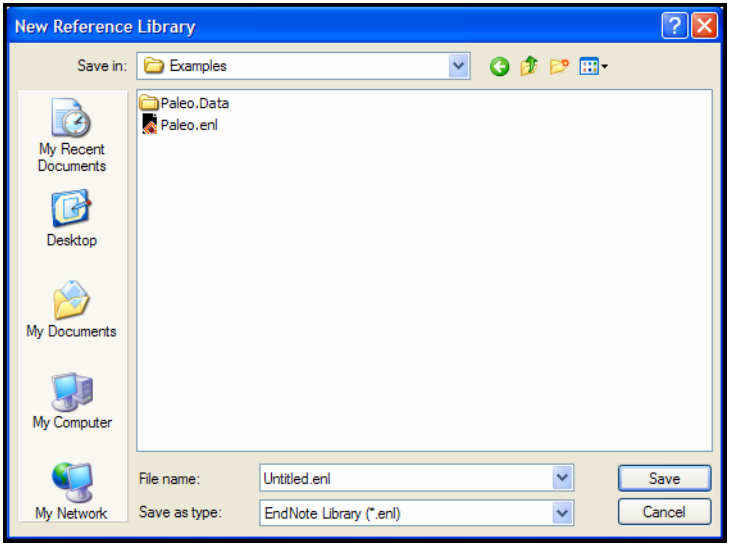
Although you can create as many libraries as you like, we strongly recommend that you keep all of your references together in one main EndNote library. Having all of the references you need in one place avoids unnecessary complexity when you are writing papers, creating bibliographies, or moving files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

Creating a New Library

To create a new library:

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

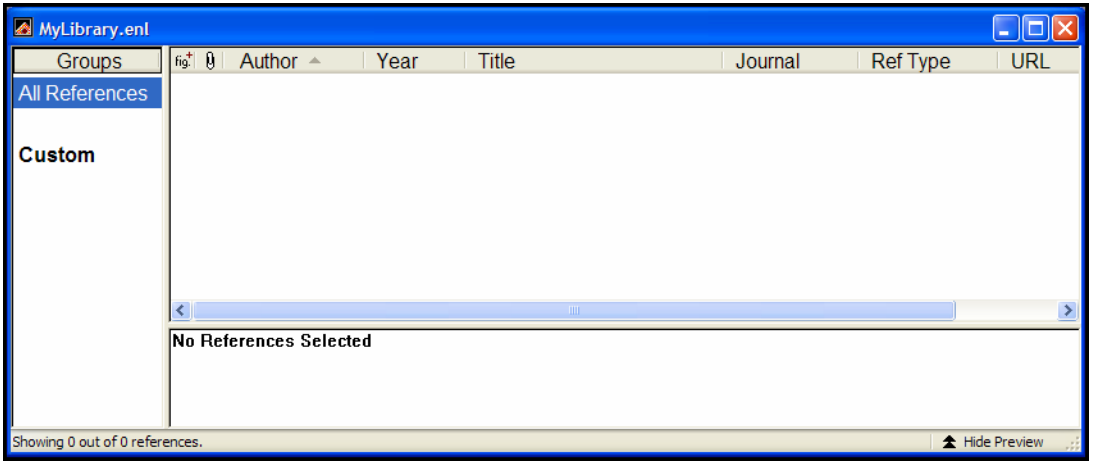
   EndNote presents a dialog prompting you to name and save the new library:



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."



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

- Chapter 5, "Entering and Editing References," discusses how to enter individual references manually.
- Chapter 6, "Searching Online Databases with EndNote," describes how to connect directly to online databases and retrieve references from them.
- Chapter 7, "Importing Reference Data into EndNote," 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 "default library" (see page 108).

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 also creates 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 *Send to>Compressed Library* command.

To save to a compressed library file:

1. Open the library in EndNote.
2. From the *File* menu, select *Send to* and then *Compressed Library*.
3. 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

To restore a compressed library file:

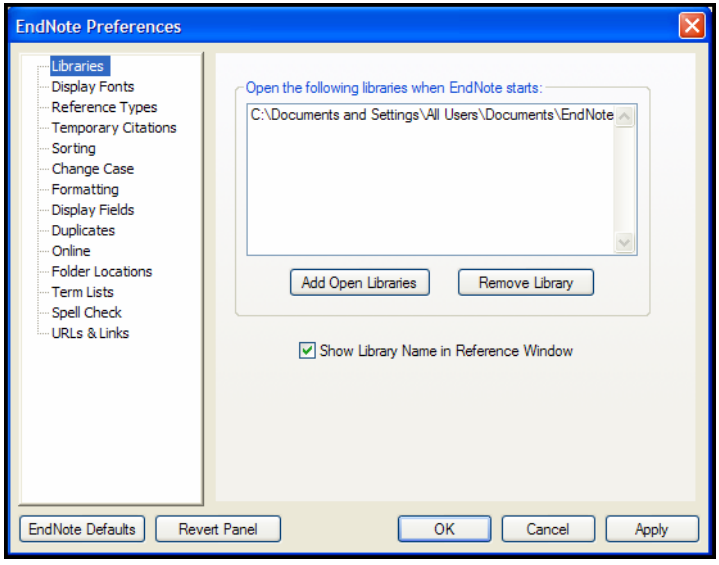
1. Use EndNote (version X or later) to open the filename.enlx file, which will extract the .ENL file and the .DATA folder to the same folder where the .ENLX file is located.
2. Use EndNote to open the filename.enl file as you normally would to use the library.

Setting a Default Library

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

To assign or change the default library:

1. Open the library or libraries that you would like to set as your default. (You must have a library open in order to set it as your default library.)
2. From the *Edit* menu, choose *Preferences* and select *Libraries*.



3. Click *Add Open Libraries* and all of the currently open libraries will be added to the list of default libraries that should open every time EndNote starts.
4. Click *OK* to save your changes and close the Preferences dialog.

Removing Default Libraries

To remove a library from the list of default libraries:

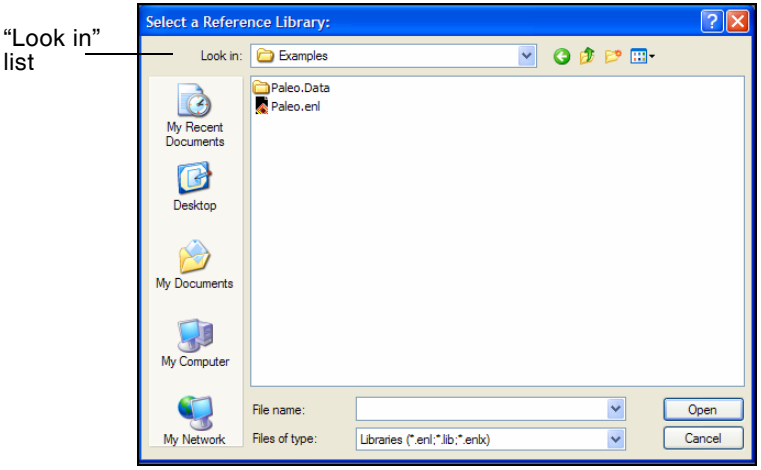
1. From the *Edit* menu, choose *Preferences* and select *Libraries* from the list of options.
2. Select the library that you would like to remove from the list of default libraries and click *Remove Library*.3.Click *OK* to save your changes and close the Preferences dialog.

Opening, Closing, and 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 below the *Open Library* command; you can simply choose the library to open it directly, and skip the dialog shown below.)

When you choose the *Open Library* command, EndNote displays a dialog similar to this:



By default, this dialog displays all files with the extension "*.ENL" 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*.

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 users 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 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, simply 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 Appendix A). 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.

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

Merging Libraries

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

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.

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" on page 532 if you would like to change the duplicates criteria.
7. 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 can use *No Translation* for text files that do not contain any extended characters.
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*

Sharing EndNote Libraries Across Different Versions and Applications

Compatibility between EndNote 8, 9, X, and X1

EndNote 8, 9, and X libraries are compatible with EndNote X1. You can open an EndNote 8 library with EndNote X1, and you can also open an EndNote X1 library with EndNote 8.

Because EndNote X1 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 X1 user, there is an easy way to compress your EndNote library and include all of the associated files and folders. See "Saving a Compressed Copy of a Library" on page 107.

- EndNote X 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 (Ancient Text, Dictionary, Encyclopedia, and Grant).
- EndNote X and X1 include 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).

- 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 includes a new grouping feature. If you open an EndNote X1 library with an earlier version of EndNote, you cannot view groups. However, groups are remembered when you open the library again with EndNote X1.

Opening and Converting Old EndNote Libraries

EndNote 8, 9, and X Libraries

EndNote 8, 9, and X libraries are compatible with EndNote X1; you can open an EndNote 8, EndNote 9, EndNote X or EndNote X1 library with these versions of the EndNote program without any conversion of the library.

EndNote Libraries Prior to Version 8

EndNote X1 can automatically convert libraries created with earlier versions of Endnote (versions 5, 6, or 7) to the version 8/9/X/X1 format. In most cases, the same process will work for libraries created in EndNote 4 and earlier.

To convert an old 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 convert 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 version 8/9/X/X1 format, and leaves the original library intact.

NOTE: EndNote X1 libraries are not directly compatible with versions of EndNote prior to version 8. You must use EndNote 8, 9, X, or X1 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 matrix showing the default mapping of workforms to reference types, see the EndNote Help file (press F1 to bring up the Help file).

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:

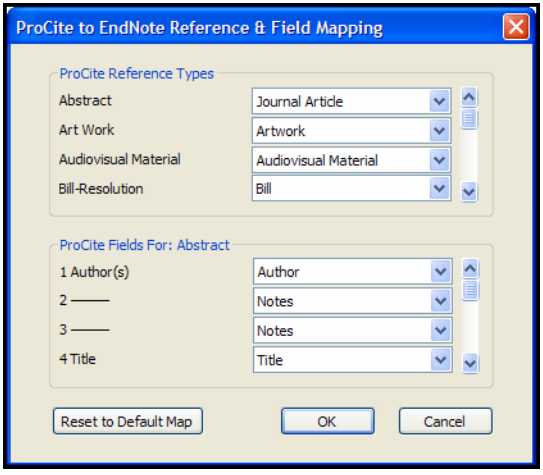
1. In EndNote, go to the *File* menu and choose *Open>Open Library* to display a file dialog.
2. At the bottom of the dialog, next to "Files of type," use the drop-down list to select "ProCite database (*pdt)."
3. Use the file dialog to navigate to the folder that contains the ProCite database, highlight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

A message will let you know that the database must be converted for use.

4. You can either:

   a) Click *Convert* to proceed with the conversion, or

   b) Click *Customize* if you wish to modify the mapping of ProCite workforms to EndNote reference types and ProCite fields to EndNote fields for each document type.



   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 an EndNote X1 Library for ProCite, Reference Manager, or an Earlier Version of EndNote

Converting an EndNote X1 library for use with EndNote versions 5, 6, or 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 X1 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 X1 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.

NOTE: EndNote 8, EndNote 9, EndNote X, and EndNote X1 libraries are compatible and require no conversion. For more information, see “Compatibility between EndNote 8, 9, X, and X1” on page 114.

To convert your EndNote X1 library for other applications:

1. In EndNote X1, go to the drop-down output style list on the Main 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 Libraries Across Platforms

EndNote X1 can read libraries created in versions 5 or later of EndNote for Windows or Macintosh. See "Sharing EndNote Libraries Across Different Versions and Applications" on page 114 for more information.

If you plan to send or email an EndNote library to someone, remember to send not only the .ENL file, but 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" on page 107. 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.

To copy a library to your handheld device, see "Using EndNote on Palm OS Handhelds" on page 561.

From Windows to Macintosh

Any library created or updated by EndNote X1 under Windows can be used by EndNote 8, 9, X, or X1 for the Macintosh. 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 library from the PC to the Macintosh. Or, 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 X1 library to another EndNote X or X1 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" on page 107.

2. Start the EndNote program on the Macintosh. (If you see a dialog prompting you for a reference library file, choose *Cancel*.)
3. From the *File* menu, choose *Open Library*. Navigate to the library you want to open.

   As long as the library has the ".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 X1 on a Macintosh can be used by EndNote 8, 9, or X for Windows. 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 files 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 copy the .DATA folder found in the same folder as the .ENL library.

NOTE: If you plan to send an EndNote X or X1 library to another EndNote X1 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" on page 107.

2. Start the EndNote program in Windows. (If you see a dialog prompting you for a reference library file, choose *Cancel*.)
3. Select *Open* from the *File* menu, and choose *Open Library*. Use the "Look in" list to navigate to 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 (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.

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.

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.

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.

Chapter 5
Entering and Editing References

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Introduction

There are various ways to add references to an EndNote library. This chapter explains how to type information into EndNote, edit EndNote references, and insert graphics and files.

See Chapter 6 for information about connecting to online bibliographic databases and retrieving references directly into EndNote. Chapter 7 describes how to import references from a variety of sources using EndNote's *Import* command.

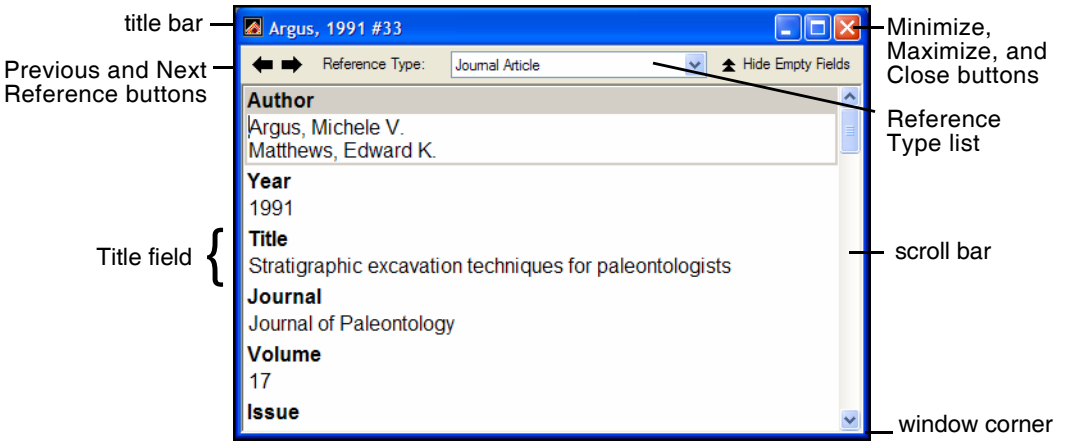
Important Points About References

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, however we recommend that the number not exceed 100,000 to maintain efficient performance managing the database.
- Thirty-nine **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.
- 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 the references can be changed using the *General Display Font* preference.
- You can insert one graphic or file attachment into the Figure field of a record.
- 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 the *Hide Empty Fields* to view only those fields that contain data. This setting is remembered until you click the icon again.
- Click the *Previous Reference* or *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 CTRL+W (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 *Display Fonts* option in EndNote's preferences.

The General display font changes the font 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

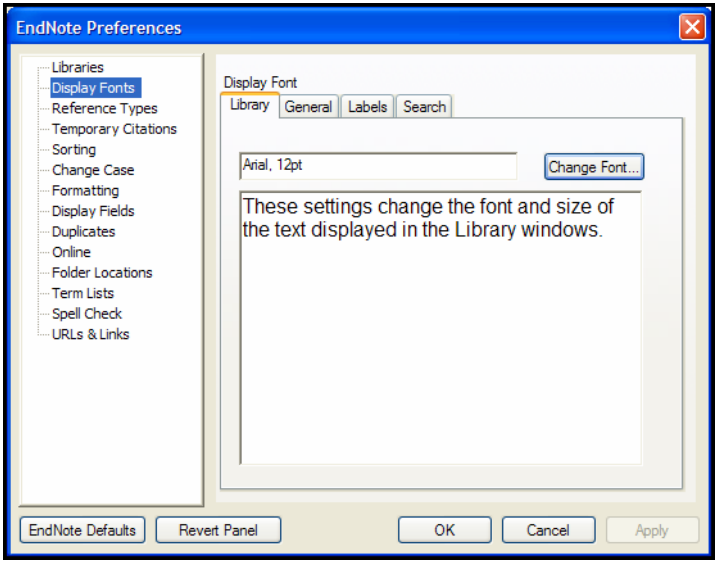
bibliographies that are printed, exported, or copied directly from EndNote.

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.

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, you can switch the display font to a Unicode font, such as Arial Unicode MS. Or, you may need to install a language pack (see "Changing Language Settings" on page 605).

To change the display fonts:

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



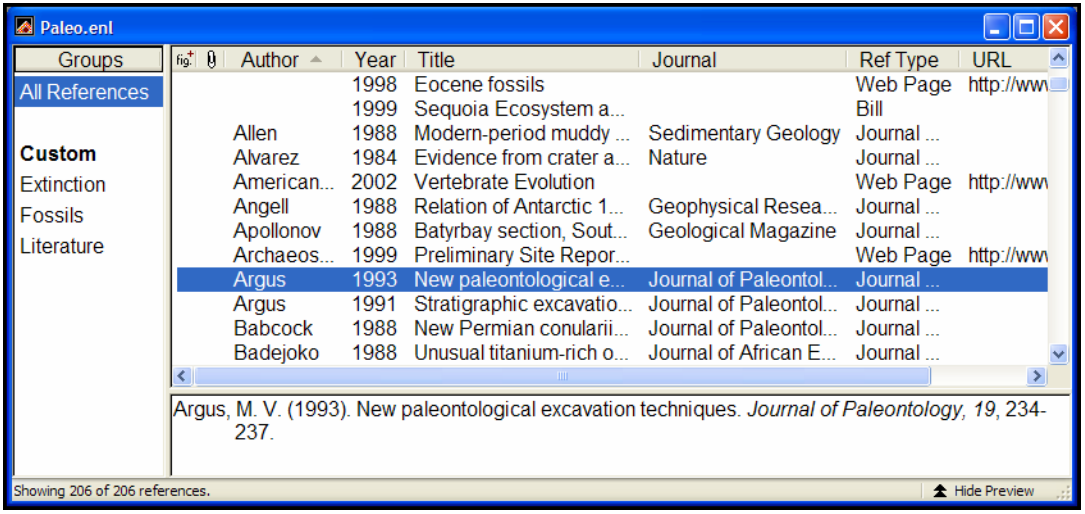
2. On each tab, click *Change Font*, then select a different font and/or size from the lists in the font dialog. Click *OK* to close the font dialog and see the example text displayed in the chosen font and size.

- **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.
- **Fields:** The Fields 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 window.

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.

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 the Library window. That reference is then highlighted to indicate it is selected.

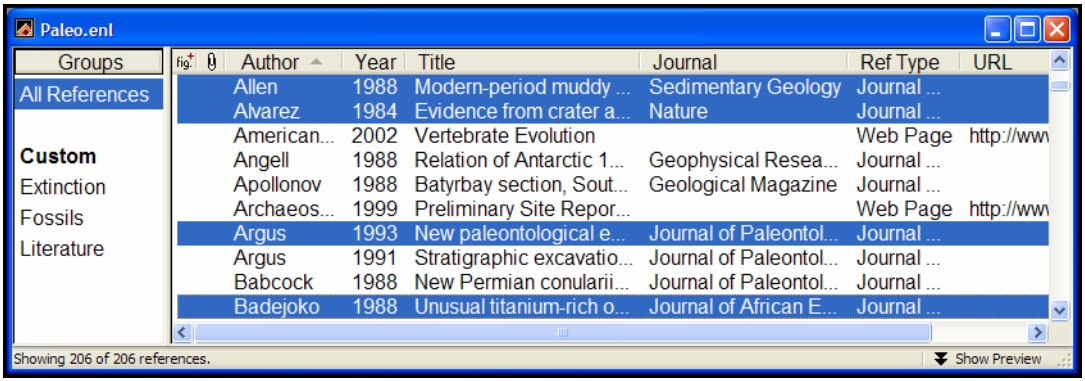


You can also select a reference by typing the first few letters found in the field by which the library is currently sorted. For example, if the library is sorted by the author field, type the first few letters of an author's last name to select the first reference by that author. If the library is sorted 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 Library window. When all the references are selected, the *Select All* command changes to *Unselect All*. See "Showing and Hiding References" on page 214 in Chapter 8 to learn how to display only the selected references, or temporarily hide the selected references from view.

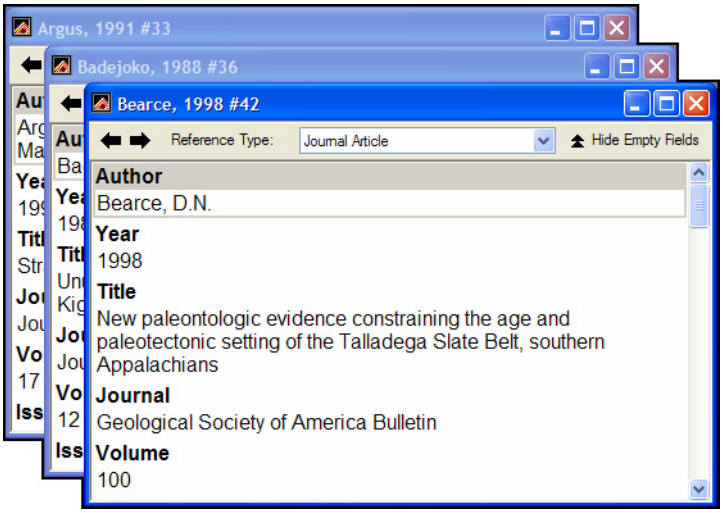
Opening, Closing, Saving, and Deleting References

Opening References

Once you have the 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*.

- Choose *Edit References* (CTRL+E) from the *References* menu.



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. Important information about entering reference data follows.

Closing References

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

- Click the close button on the Reference window.
- Choose *Close Reference* (CTRL+W) from the *File* menu.
- To close one reference and view the next or previous reference in the library, use the *Next Reference* and *Previous Reference* commands in the *References* menu (or the buttons in the Reference window). See page 127 for details.
- 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) as described above, 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

First, make sure you display All References in the Library Window. If you display a group subset and attempt to delete a reference, it will be deleted only from that group but still exist in the library.

Delete references from a library by first displaying All References, then selecting those references you want to delete and choosing one of the following commands:

- *Delete References* (CTRL+D) from the *References* menu,
- *Cut* (CTRL+X) from the *Edit* menu, or
- *Clear* from the *Edit* menu.

Delete References and *Clear* serve the same function of removing the references from the library. *Cut* also removes the references from the library, but it stores them temporarily on the Clipboard so that you can paste them into another library. (Information on the Clipboard is replaced with whatever you *Cut* or *Copy* next.)

All three commands have you confirm that you want to remove the references from the library. You cannot undo these operations, so be sure you want to delete the selected reference(s) before dismissing EndNote's warning.

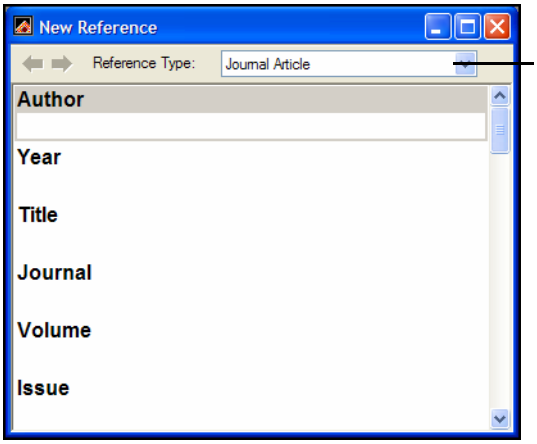
NOTE: If you delete a reference, you delete its record number in that library forever. Even if you paste the reference back into the same library, it is assigned a new, unique record number. This may cause incompatibilities with older papers that have citations that use old record numbers. We strongly 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

Overview

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 the bibliographic data into each of the fields in the reference according to the rules outlined later in this chapter. When you are finished, close the reference to save it and add it to the library.

The rest of this chapter goes into more detail about how to enter references into EndNote.

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 Chapter 14 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 or Table** reference type if you want to include a figure and later insert that image as a table in Microsoft Word. Figures in all other reference types will insert into Word as figures, which are listed and numbered separately from tables.

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.

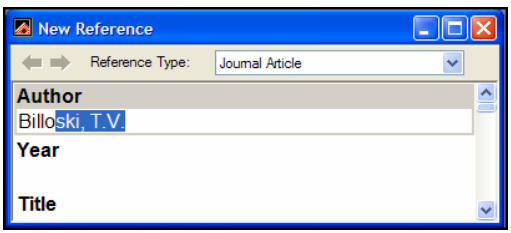
NOTE: There are a few exceptions to this punctuation rule, notably in the Author, Editor, and Edition fields. Read on for details.

Each field can contain up to 64 KB, or approximately 16 pages of plain text.

A full set of key commands is available so that you can enter references without using the mouse. See Appendix E, "Keyboard Commands" for a list of commands available to you.

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.

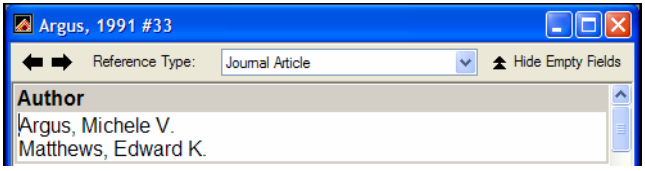
See Chapter 9 for more information about EndNote's term lists.

NOTE: Both the "Auto-Update" and "Auto-Complete" term list features may be turned off with the *Term Lists* panel 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 are entered one per line.

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 "Author List (Bibliography and Footnotes)" on page 440 for information about how EndNote can format author names in bibliographies. For more information about term lists, see Chapter 9.

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 comma 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 prefixes (such as de, van, von, etc.) when it alphabetizes references in a bibliography (page 526).

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 field.

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. See Chapter 9 for more information about term lists and turning these options off.

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 page 260 for details). 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" on page 431). 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" on page 260.

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 page 258).

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 page 394).

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 the "Page Numbers" section in Chapter 15).

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

Enter dates as you would like them to appear in your references; 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 field.

Entering Dates for Record Keeping

You can use the Access Date and Last Modified Date fields for your own record-keeping purposes.

If you plan to sort your references by these dates, or search for a range of dates, enter the numerical version of the date instead of the name of the month, because EndNote does not interpret dates and would therefore sort months alphabetically. For example, enter "2004/5/21" instead of "May 21, 2004." Enter the year first, followed by the month and the day, so that the references can be sorted first by year, then month, then the day.

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 figure. It is most useful if you are importing reference data or retrieving references directly from an online source.

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 page 394).

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. See Chapter 9 for details.

Notes and Abstract

The Notes, Research Notes, and Abstract fields can each hold up to 64 KB, which is equivalent to about 16 pages of plain 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 link 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 in 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.

For more information, see "Linking References to Websites and Files" on page 155.

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.
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" on page 158.

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" on page 541.

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" on page 156 and "Opening a Linked File or URL" on page 160.

Figure and Caption

The Figure field can contain a graphic or an object (file attachment). For information about entering figures, see "Inserting Figures" on page 150.

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" on page 311. 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 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, the text will appear that way 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 β.

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 *Text Style* toolbar.

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.

Plain Text

The *Plain Text*, *Plain Font*, and *Plain Size* commands on the *Edit* menu or on the *Text Style* toolbar (or from the *Edit* menu) 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 *Text Style* toolbar.

The default font used to display EndNote's "Plain Text" is the default font for your operating system, but it can be changed using the *General Display 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 Display 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 also 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

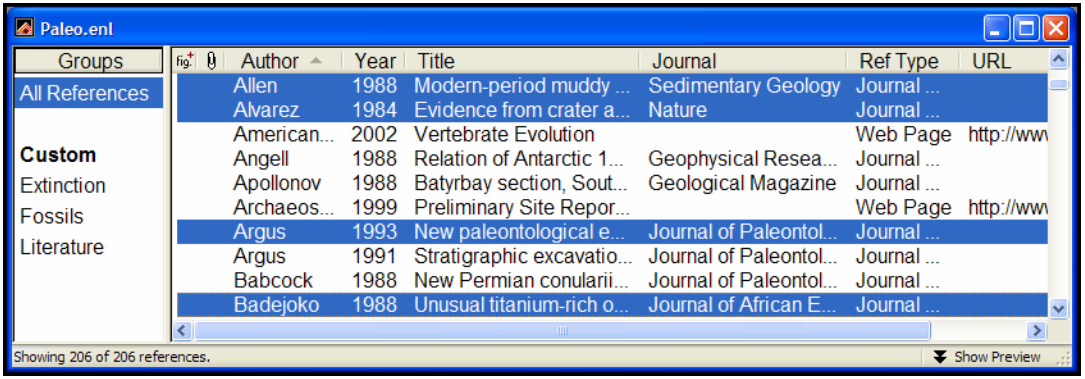
in the right place, release the mouse button to "drop" the text there.

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 select 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 (see Chapter 7).

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 and save them by pressing CTRL+W.

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" on page 604.

Entering Characters with Diacritical Marks

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 program, and paste it into your EndNote library.
- Use the Character Map program supplied with Windows for this purpose. Character Map is described in the next section.

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.

NOTE: If characters do not appear as they should in EndNote, see "Displaying Extended/Special Characters" on page 604.

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

EndNote extends the organization of reference information by including the ability to embed graphics and files in an EndNote library and link them to a paper. You can insert a single graphic or file into the Figure field of any EndNote reference.

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, Deleting, and Renaming Fields” on page 394.

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” on page 311 for more information about using figures 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 graphics and files, and may contain minimal reference information.

NOTE: Figures in the Chart or 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 "Adding, Deleting, and Renaming Fields" on page 394.

Inserting Graphics and Files

Notes about inserting graphics and files into the Figure field:

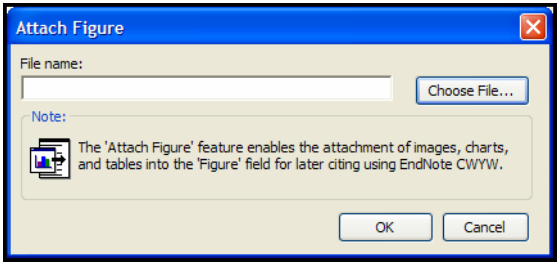
- Always use the *Figure>Attach Figure* command from the *References* menu to insert graphics and other files into the Figure field. If you simply use *Copy* and *Paste*, System settings are used and you could ultimately lose colors and other attributes from the original file.
- Each EndNote reference 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" on page 154 for more information about the .DATA folder.
- After inserting a graphic or file, 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 image 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, use the Reference Types preferences panel as described on page 522.
- 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 figure file and *Insert* it. EndNote recognizes *at least* these types of picture and object files:
   - 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. 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).

NOTE: The Caption field is a text-only field. URLs or paths and filenames are not hot linked when entered into this field.

Opening the Figure File

Double-clicking on a graphic or attachment 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 figure. The program used to create the file may not open.

Storing and Sharing Figure Files

When you insert a figure, EndNote copies the 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" on page 154.

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.

Linking References to Websites 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

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 from the EndNote website:

```
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)" on page 142.

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 URL and 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" on page 158.
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 "URLs & Links" on page 541.

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)

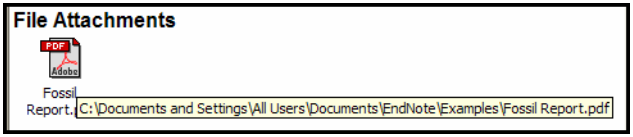
When the check box is selected, EndNote makes a copy of the original file and places it in the DATA\PDF folder that is part of your EndNote library. This saves the file as a "portable link" that can move as part of the library. EndNote will always be able to access the file, even when you share your 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.

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" on page 541.

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. From the *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.

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 website. Use the *Online* settings in EndNote's preferences to select the Web browser that should open when the *Open URL* command is activated. See page 533 for details.

Using the *Open URL* 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 display an 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 the 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" on page 158 for information about the difference between a file linked with a relative path and a file linked with an absolute path.

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.

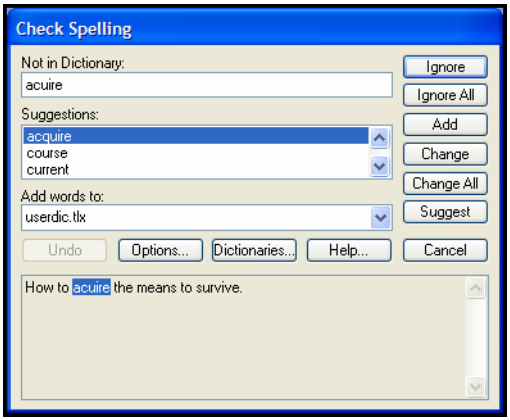
Starting Spell Check

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, or press F7.

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" on page 536.

Changing Text in Multiple 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 *References* 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 Field* 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 Field* 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 References* 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.

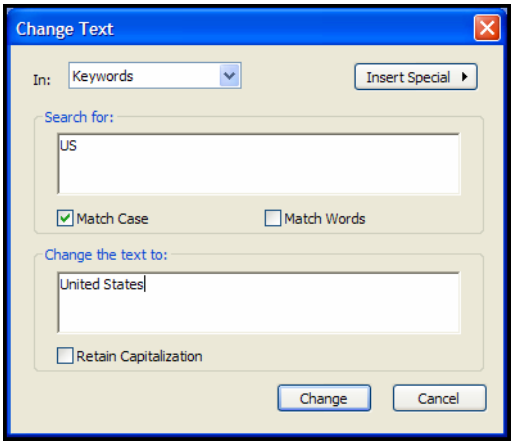
   To enter a Tab or Carriage Return in the text box, use the *Insert Special* button (ALT+S).
5. Change the "Match Case" or "Match Words" settings if necessary (see page 217 for details).

   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 Tab or Carriage Return 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.



This set up changes all occurrences of "US" to "United States" in the Keywords field.

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

9. 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 Tab or Carriage Return in the text box, use the *Insert Special* button (ALT+S).

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 *References* 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.

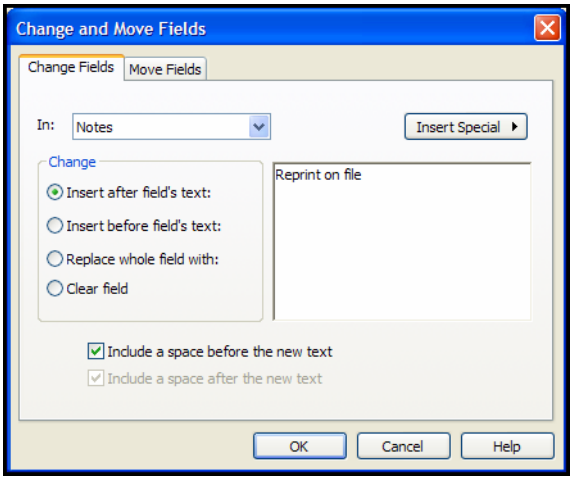
   - **Insert before field's text:**
     Inserts the text at the beginning of the chosen field. It does not modify text that is already in the field.

     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 Tab or Carriage Return in the text box, use the *Insert Special* button (ALT+S).

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.

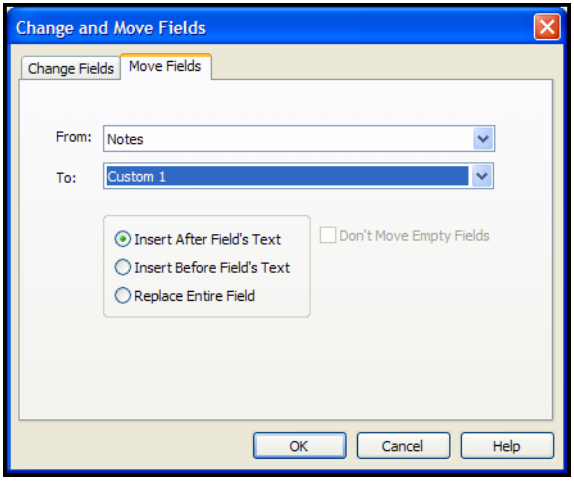
To move the contents of one field to another:

1. Determine which references you want to modify. Make sure only those references are showing in the Library window.
2. From the *References* 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.

The example below shows the *Move Field* options set up to move the contents of the Notes field into the Custom 1 field. If the Custom 1 field already has data in it, the contents of the Notes field will be added after the existing text.



Chapter 6

Searching Online Databases with EndNote

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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! And to make it even easier, the results of your searches appear as EndNote references—ready for you to store in 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 Chapter 17).

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 Chapter 7 for instructions.

What EndNote's Searching Offers

EndNote's search interface provides a simple way to do basic searches on EndNote libraries and remote online databases. The same Search window 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 Chapter 7). 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.

Quick Overview

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 throughout this chapter. Also see page 62 (in the guided tour chapter) for a detailed demonstration of how to use this feature.

To retrieve references from a online database:

1. From the *Tools* menu choose *Online Search* and select the *New Search* command from the submenu.
2. Select the database that you would like to search, and click *Choose*.

   When the connection has been established, an empty Retrieved References window opens and EndNote's Search window appears, ready for you to enter a search.
3. Enter your search request into EndNote's Search window, and click *Search*.
4. EndNote searches the database and displays the number of references that were found to match your search criteria. Click *OK* to retrieve the references.
5. Once the references appear in the Retrieved References window, you may browse through them and transfer the ones that you want to keep to your EndNote library.

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

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" on page 175).

NOTE: To gain access to a restricted database, you will need to contact the information provider directly to set up an account. Thomson ResearchSoft 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 uncheck 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 "Firewalls and Proxy Servers" on page 615 for information about proxy servers. You will need the address and port number of your proxy server.

Free Databases

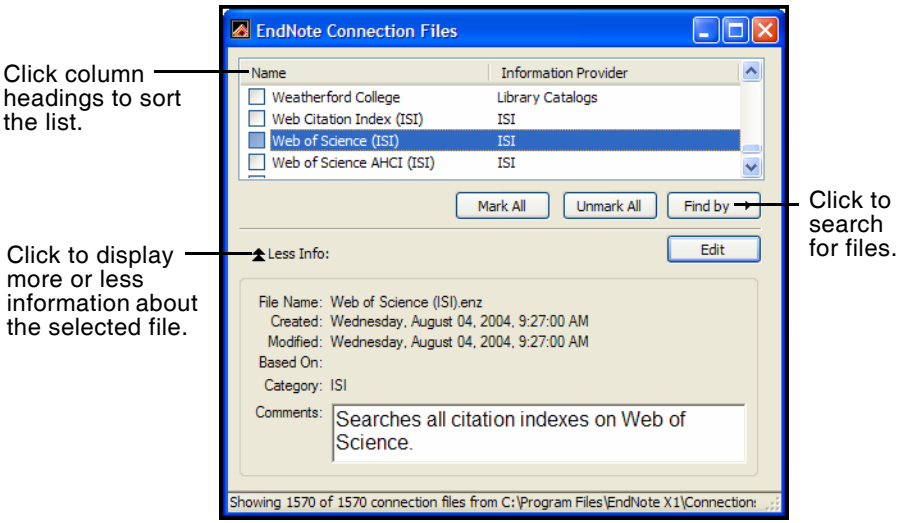
Two major databases that do **not** require passwords are the PubMed database from the National Library of Medicine, and the Library of Congress. Many of the general library catalogs are also unrestricted. Additional connections may be available at the EndNote website (http://www.endnote.com/support/enconnections.asp).

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

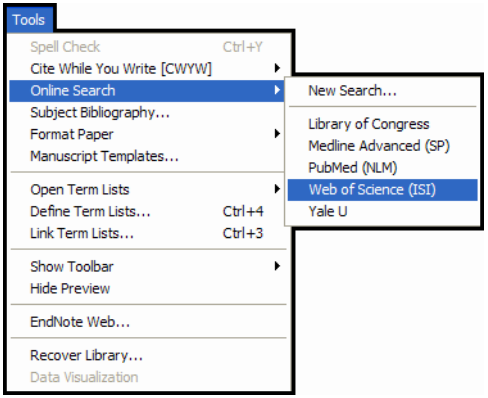
Picking Your Favorite Connection Files

EndNote provides hundreds of connection files for a variety of sources. To peruse the list of available connection files in EndNote's Connections folder, choose *Connection Files* from the *Edit* menu, and select *Open Connection Manager.*



When you have found a connection file that you'll want to use in the future, click the check box to the left of it to mark it as a favorite.

All marked files appear in a submenu of the *Online Search* item, giving you easy access to those files you use most often.



This step is not required; you can always choose the *New Search* command to pick a connection file that is not listed in the menu.

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 the entire 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 Chapter 17.

What if Your Database Isn't Listed?

If a connection file hasn't 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 "Steps to Create a New Connection File" on page 512 for more information.

Adding Connection Files

The Connection Manager displays all of the connection files in the selected connections folder. If you have received a connection file from a colleague or librarian or downloaded one from the Web, simply copy it into your Connections folder in your EndNote folder, and it will appear in the Connection Manager.

If necessary, you can 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.*

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

Searching an Online Database

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 window to search the online database.

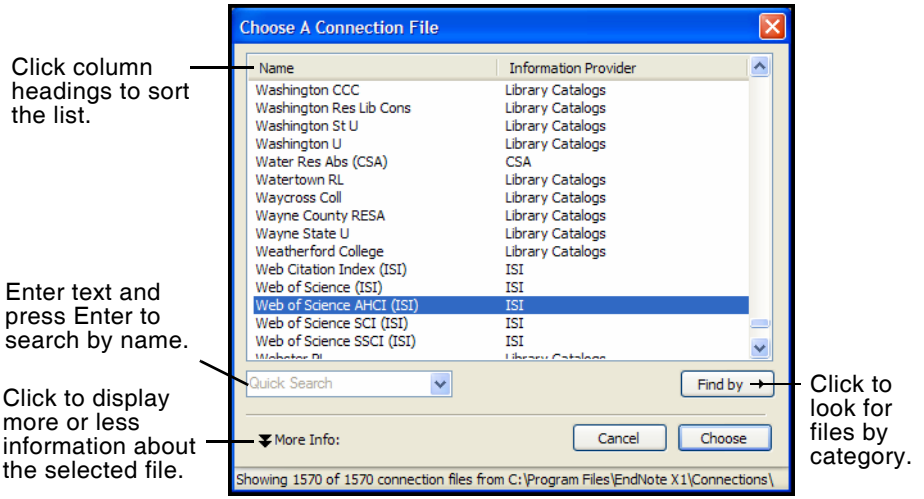
Establishing the Connection

If you have connected to a particular database before, or if you have selected a database as one of your "favorites" (see page 175) it will appear in the submenu of the *Online Search* command. This saves you a few steps in the process of using the *Online Search* command.

To connect to an online database:

- From the *Tools* menu, choose *Online Search* and then select the desired database if it is listed there. That will start the connection.

- If the database you want to search is not listed with the *Online Search* command, choose *Tools>Online Search>New Search*, select the desired database, and click *Choose* to make the connection.



(This Connection dialog is very similar to the Connection Manager described on page 175, but it does not provide the options to edit connection files or mark them as favorites.)

When a successful connection has been made, the Retrieved References window appears and the Search window 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 until you close the Retrieved References window or, after a period of inactivity, the connection automatically times out. If you are using a dial-up Internet connection (with a modem), EndNote does not disconnect you after it closes a connection to an online database.

NOTE: If you have difficulty establishing a connection, see "Troubleshooting Connections" on page 613.

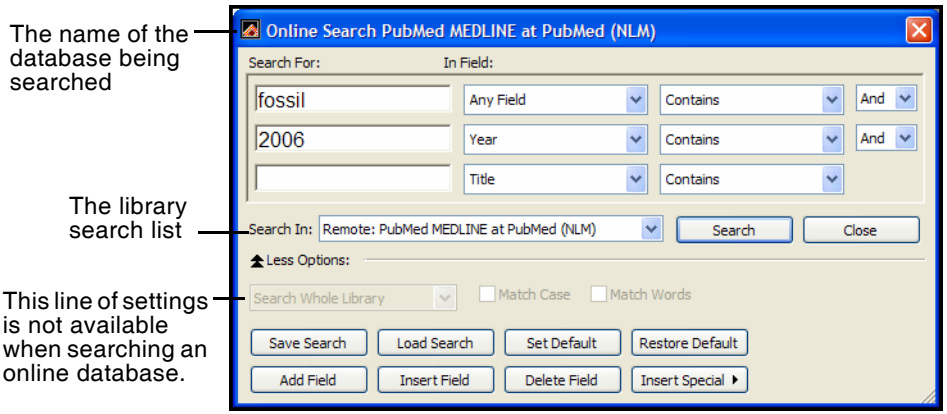
Online Database Searching (Overview)

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 window.
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 this section. See "Searching for References" on page 215 for general information about using the Search window.



The Library Search List

The appropriate database must be selected in order to submit a search to the online database. You could also search a local EndNote library, or search only the references that are in the Retrieved References window instead of searching the entire online database.

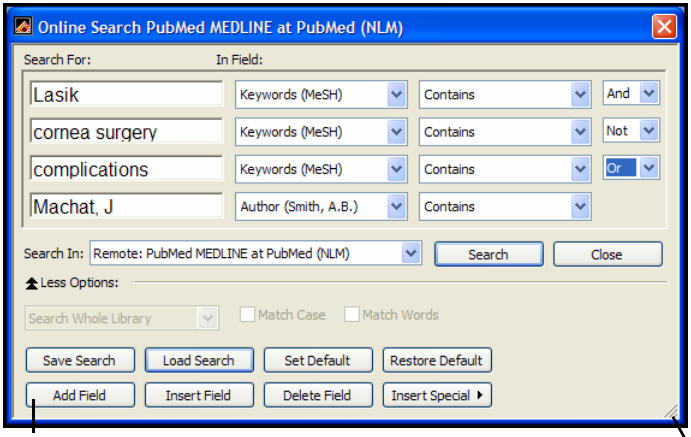
Available Search Options

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

- The search set list is dimmed when searching an online source. You are always set up to search the entire database whenever you are searching an online database.
- 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" on page 181).
- 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 window, finding the search results of the first two items, then combining that result set with the third search line, and so on.



Click *Add Field* to append additional search lines to the list.

Click and drag the corner to resize the window and view more search lines at one time.

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

```
(((lasik AND cornea surgery) NOT complications)
OR Machat, J)
```

First EndNote looks for references about LASIK and cornea surgery, then any references about complications would be omitted from that set, and finally all references by "J. Machat" 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 Chapter 8 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 in EndNote's Search window list only available indexes for the online database, so you won't 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" on page 509 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 wouldn't 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" on page 613.) 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 Retrieved References window) or EndNote library that is active (forward-most) 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 from one currently open database to another, choose from the Search library list found on the Search window.

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 in the Search window 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.

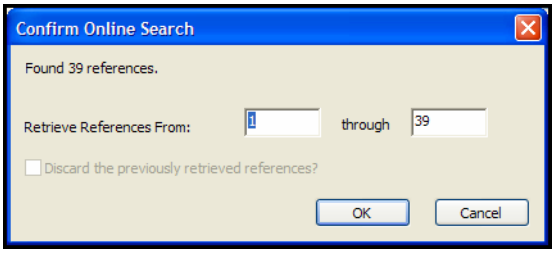
When switching the focus of your search from one source to another and back again, the original search setup is retained as long as you haven't changed any settings in the Search window and the field selections are available in both databases.

Running Multiple Searches

If references are in the process of being retrieved when you submit another search to the *same* online database, the new search cancels the retrieval of the previous search. However, simultaneous searches of *different* online sources do not interrupt each other's search and retrieval.

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.)



Change one or both of these numbers to specify the range of references to be downloaded.

Choosing *OK* brings the Retrieved References window forward and EndNote begins to retrieve references into it.

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 50 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 50. You can also use the *Pause* button at the bottom of the Retrieved References window to halt the retrieval. Click *Resume* if 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.

If references have already been downloaded into the Retrieved References window, this dialog (shown above) gives you the option of deleting them with the "Discard the previously retrieved references?" check box. Choosing that option deletes

all of the references in the Retrieved References window (whether they are "showing" or not). Newly retrieved references are appended to the references already showing in the Retrieved References window.

The Retrieved References Window

References downloaded from an online database are displayed in a temporary holding place called the Retrieved References window. When you connect to multiple online databases, each one is represented by its own Retrieved References window.

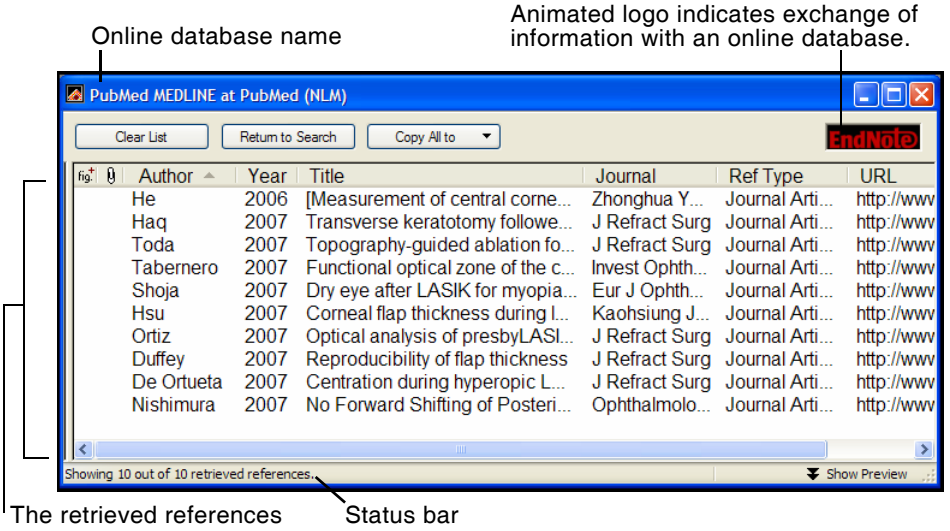
Use the Retrieved References window to browse through the references you have found. Open the references to review their contents just as you would for a reference in an EndNote library: by double-clicking, or selecting the reference(s) and choosing *Edit* from the *References* menu, or pressing ENTER. Use the *Search*, *Sort*, and *Show/Hide Selected References* commands to help you review the search results. The preview pane can also be used to preview a formatted version of the selected references. You can even use the *Change Field* command to add a comment to the retrieved references. (See Chapter 8, "Searching in EndNote and Using Groups" for information about these database commands.)

Retrieved references that you want to keep should be transferred to a new or existing library as described on page 186.

Features of the Retrieved References window

- The window's title bar displays the name of the online database to which you are connected.
- The **status bar** at the bottom of the window displays messages pertaining to the status of the connection and reference retrieval.
- The *Pause* button lets you pause or resume the reference retrieval. Pressing the Escape (ESC) key also stops retrieval.
- As with a normal EndNote Library window, the center region contains the (retrieved) references.

- An animated logo at the top of the window indicates exchange of information with the online database.
- Click *Clear List* to easily discard the current list of retrieved references.
- Click *Return to Search* to return to the Search window and initiate another online search.
- Click *Copy All to* or *Copy Selected to* to copy retrieved references to an EndNote library. Your references are not saved permanently until they are copied into an EndNote library.



Differences Between the Retrieved References Window and a Library

Although a Retrieved References window mimics many of the features of an EndNote Library window, it is **not** a place where you permanently store references. Consequently, features such as term lists, and the ability to add references, are not available when working with references in the Retrieved References window.

While retrieved references may display with record numbers, record numbers are not permanently assigned until you save the references to an EndNote library. As a result, you cannot cite references from this window in a paper—they must be saved to an EndNote library first.

Term lists are specific to individual EndNote libraries, therefore term lists (and their auto-completion and auto-update features)

are not available for references in the Retrieved References window. However, when you transfer references to a library, the new terms are added to that library's term lists (as long as the auto-update preference has not been turned off).

Saving References to a Library

The Retrieved References window is a temporary holding bin for the results of an online search. They need to be transferred to the library of your choice using any one of the following methods:

- If the destination library is open, you can drag-and-drop selected references from the Retrieved References window to the destination library. Select the desired references, then click on any part of the selection, keep the mouse button pressed, and drag the selection to another Library window. The selected references will be copied to that library.
- Select the references that you want to save, and click the *Copy References To* menu at the top of the window. Choose the option to copy them to any currently open library (names of open libraries are listed in the menu), to a new library, or to an existing library that is not already open. If no references are selected, all of the references are transferred.
- Selected references may be copied by choosing *Copy* from the *Edit* menu, and then pasted into another library by opening the desired library and choosing *Paste* from the *Edit* menu.

NOTE: EndNote does not check for duplicates when you use any of the methods above. If you transfer your references from the Retrieved References window to a temporary library, you can use the *Import* command to import that library into your main library and check for duplicates in the process. See Chapter 7 for details. You may also use the *Find Duplicates* command in the *References* menu.

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.

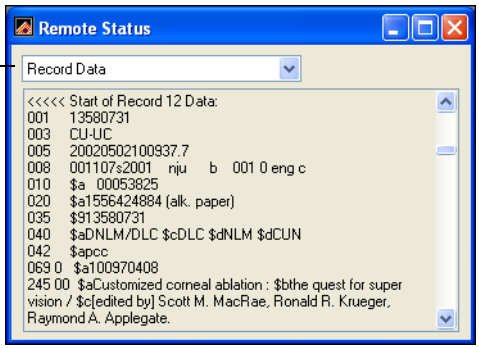
View the connection status information by choosing *Show Connection Status* from the *Window* menu to display the Status window. When that window is open, this command changes to *Hide Connection Status*, which closes the Status window.

The Status window displays information for all of the current connections. 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.

Click to change the view between Record Data and Status Messages.

The data shown here is in MARC format. This format is described on page 489



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).

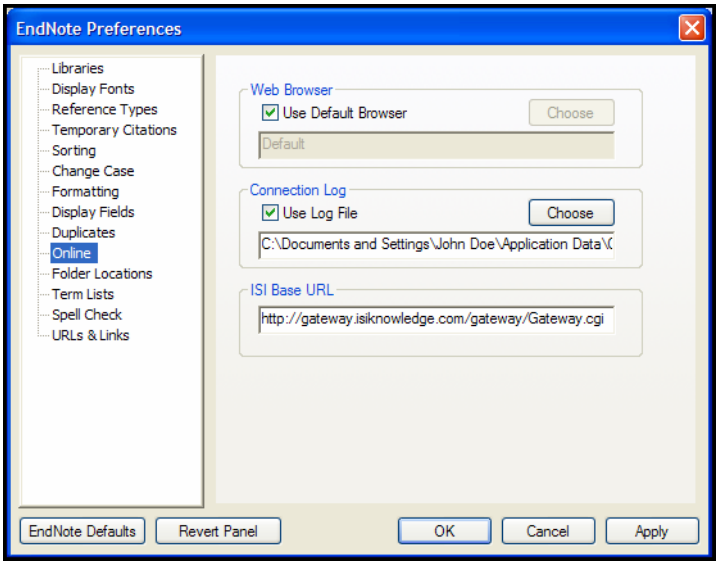
The Log File

All messages and retrieved references for a given EndNote session are recorded in EndNote's log file. By default, the log file is called "Connect.log" and is saved in the Windows\Application Data\EndNote folder or the Documents and Settings\"User Name"\Application Data\EndNote folder, depending on your system version. 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 Online settings in the Preferences window. To do so, choose *Preferences* from the *Edit* menu and select the *Online* 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 unchecking 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).

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 Science*

The Web of Science is the Web interface for access to the Thomson ISI Citation Databases, which cover over 8,000 international journals in the sciences, social sciences, and the arts and humanities. Through ISI Links, the Web of Science also offers navigation to electronic full-text journal articles, genetic information, and chemical and patent databases.

Search the 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.

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

Full Record Charges

Web of Science requires a paid subscription. You may have an online subscription with username and password, or you may have access to a local Web of Science 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 X1. However, if you want the ability to link back to Web of Science records, you may need to update the Base URL. From the *Edit* menu, select *Preferences*. Then select *Online*, and click the *EndNote Defaults* button to update to the latest Base URL.

Locally Mounted Web of Science Servers

You must use Web of Science version 4.3.2 or later. To access your local Web of Science server, first contact your network administrator for the server address (URL) plus the path to your institution's copy of the ISI Gateway V2.5 software.

To search a locally mounted Web of Science server, open the appropriate Web of Science connection file, click on *Connection*

Settings, and update the Server Address and Custom fields with your local server address and ISI Gateway software path.

To link back to Web of Science records once they are in EndNote, you must change the Base URL to your local server address. From the *Edit* menu, select *Preferences*. Then select *Online*, and enter your local server address as the Base URL.

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 "URLs & Links" on page 541.

Chapter 7

Importing Reference Data into EndNote

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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; use the *Online Search* command instead. This is by far the easiest way to get data into EndNote because it involves no intermediate steps. The direct retrieval of references is not covered in this chapter. See Chapter 6 for information.

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 CD-ROMs or online data services (for example, Ovid, SilverPlatter, or Thomson Scientific)
- 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

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. This chapter covers the basic import instructions first, and then goes into detail about how to get your data files in the right format and choose the correct import option.

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 Chapter 16), 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 on page 209.

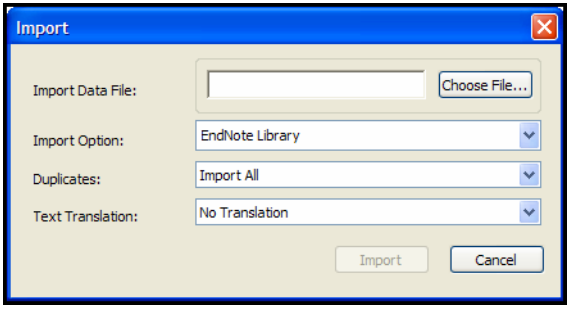
NOTE: When importing records, we recommend that you import into a temporary new library, determine which ones you want to keep, and then move those records into your permanent library.

General Importing Instructions

NOTE: See "Importing EndNote Libraries" on page 112 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 File* 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 Option* list. Import options are described on page 194.
5. Select an option from the *Duplicates* list:
   - *Import All*
     Imports all references, including duplicates.
   - *Discard Duplicates*
     Imports all references except duplicates.
   - I*mport 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 page 532 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. 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 (page 167), 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.

Import Options

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 page 206 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 page 201.

- **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. For ProCite and Reference Manager, see "Creating a Library from ProCite" on page 116.
- **ISI-CE**
  Used to import text files downloaded from the *Web of Science* and other Thomson Scientific sources.

NOTE: See "Searching Web of Science" on page 189 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" on page 481).
- **EndNote Generated XML**
  Used to import EndNote's proprietary XML format.
- **Other 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 won't see the import filter that you need in this list. Choose *Other Filters* from the *Import Option* 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 Option list in the Import dialog.

  The table on page 656 provides more information about the download formats that work with these filters. See page 197 for information about how to choose the filters to appear in the *Import Option* 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 Chapter 6 for more information.

NOTE: See Chapter 16 for information about creating and modifying import filters. All of the import filters (except Tab Delimited and EndNote Generated XML) can be modified.

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:

- How to download the data in the right output format.
- Which import filter to use to import the data into EndNote.

This section describes these two items. The table on page 656 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
```

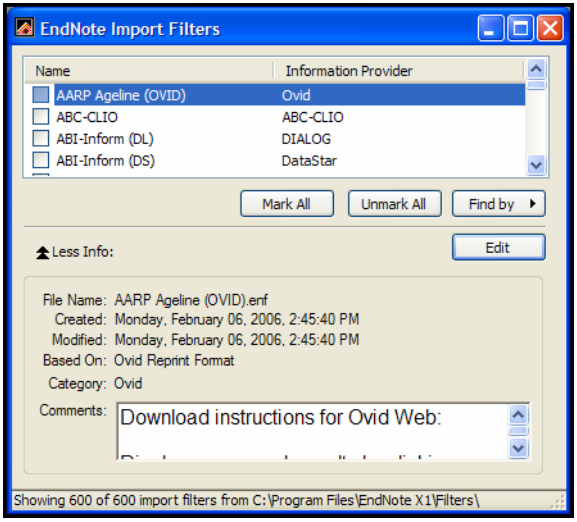
NOTE: If data is inconsistently tagged, or poorly delimited, it may not be possible to import all the data accurately. See page 461.

If references have been emailed to you, 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 middle of 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 *More 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.

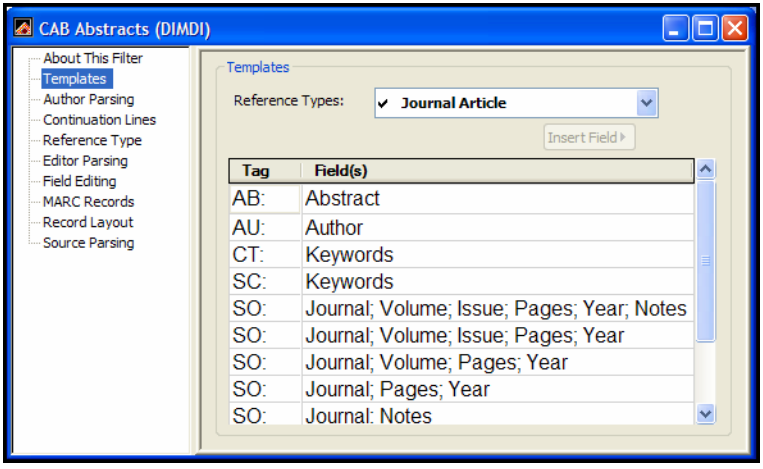
When you have located the filters that you want to use, mark them as your favorites by clicking the check box to the left of the filter name. You can also mark all of the filters currently showing after using the *Find* option by clicking *Mark All*. Once a filter is

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 Chapter 16 for information about creating and modifying filters. You can also check our website 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 Chapter 16 for information about editing filters.

Changing the Filter Folder

By default, all filters provided with EndNote are grouped in the Filter folder in the EndNote folder. These are the filters displayed when you open the Filter Manager.

To access a different set of filters with the Filter Manager:

1. From the *Edit* menu, choose *Preferences*.
2. Choose *Folder Locations.*
3. In the Filter Folder section, click *Select Folder*.
4. Locate the folder that contains the filters you would like to use, double click it to open it, and then click *Select Folder*.
5. Click *OK* to close the Preferences window and save changes.

When you select a filter folder, only the filters at the top level of that selected folder are listed in the Filter Manager. Filters in sub-folders (folders within the selected folder) will not appear.

Output Formats with Corresponding Import Options/Direct Export

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).

Importing from Online Databases

A subset of supported services are listed in Appendix D with their recommended output formats and EndNote import filters. 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.

Direct Export from Web Pages

Certain websites 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. A list of systems in Appendix D provide a direct export of references into EndNote. 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!

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 (as described in this section).
- Copy and paste each piece of data from its source into the proper fields in EndNote, as described on page 209.
- Enter the data manually by typing it into EndNote as described in Chapter 5.

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.

This section describes 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)

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." (See page 623 for the Generic field names.) 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 Appendix C 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" on page 193 for detailed instructions on importing.

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.
- 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 page 206 for information about using a predefined EndNote Import format if you would rather not create your own filter.)

This section 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 Chapter 16 for instructions on how to create a filter). The template of a filter for the above data file would look like this:

Tag	Field(s)
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 can't 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

EndNote has two ways of setting the reference type for each of the imported references.

- One method is to specify a reference type by using %0 (zero) and the reference type name.

With this method, you can precisely specify the reference type, and not rely on the appearance of certain tags, as described below. 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 Ancient Text
%0 Artwork
%0 Audiovisual Material
%0 Bill
%0 Book
%0 Book Section
%0 Case
%0 Chart or Table
%0 Classical Work
%0 Computer Program
%0 Conference Paper
%0 Conference Proceedings
%0 Dictionary
%0 Edited Book
%0 Electronic Article
%0 Electronic Book
%0 Encyclopedia
%0 Equation
%0 Figure
%0 Film or Broadcast
%0 Government Document
%0 Grant
%0 Hearing
%0 Journal Article
%0 Legal Rule or Regulation
%0 Magazine Article
%0 Manuscript
%0 Map
%0 Newspaper Article
%0 Online Database
%0 Online Multimedia
%0 Patent
%0 Personal Communication
%0 Report
%0 Statute
%0 Thesis
%0 Unpublished Work
%0 Web Page
%0 Unused 1
%0 Unused 2
%0 Unused 3

- If you do not state the reference type using the %0 tag in each record, then EndNote uses the following rules to assign reference types to the imported references:

Tags Present in the Reference	Reference Imports As This Reference Type
J and **V**	Journal Article
B	Book Section
R but not **T**	Report
I without **B**, **J**, or **R**	Book
Neither **B**, **J**, **R**, nor **I**	Journal Article

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 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	Secondary Title (Journal Name)
%K	Keywords
%L	Call Number
%M	Accession Number
%N	Number (Issue)
%P	Pages
%Q	Translated Title
%R	DOI
%S	Tertiary Title
%T	Title
%U	URL
%V	Volume
%W	Database Provider
%X	Abstract
%Y	Tertiary Author
%Z	Notes
%0	Reference Type
%1	Custom 1
%2	Custom 2
%3	Custom 3
%4	Custom 4
%6	Number of Volumes
%7	Edition

Tag	EndNote Generic Field Name
%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
%=	Last Modified Date
%~	Name of Database

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" on page 204), 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 in Chapter 5. See page 388 for information about setting a default reference type for new references.

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 Website

In some cases, you may be directed to download a conversion utility or instructions from the EndNote website 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).

If you do not have Internet access, contact EndNote technical support for assistance.

Unsupported Databases

If your program is not on the chart, see page 201 for instructions on setting up a tab-delimited file 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	Export from Bookends or Bookends Pro using the "ProCite" format, and import the resulting file into EndNote using the *ProCite* import option.
BibTex	User-contributed utilities and instructions for converting BibTex files are available from the EndNote website 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 website. 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 website. Go to http://www.endnote.com/support/enconversion.asp.
Papyrus 6 and 7	Conversion utilities are available from the EndNote website. Go to http://www.endnote.com/support/enconversion.asp.
ProCite	See "Creating a Library from ProCite" on page 116.
Publish or Perish	A conversion utility is available from the EndNote website. Go to http://www.endnote.com/support/enconversion.asp.
Ref-11	A conversion utility is available from the EndNote website. Go to http://www.endnote.com/support/enconversion.asp.
Reference Manager	See "Creating a Library from Reference Manager" on page 117.
Refer/BibIX	Use the *Refer/BibIX* import option to import a Refer or BibIX text file.
RefWorks	In RefWorks: 1. Select the references to export. 2. Select the *RefWorks Tagged* format. 3. Click the *Export to Text File* button. In EndNote, use the RefWorks Import filter to import the text file.

Chapter 8

Searching in EndNote and Using Groups

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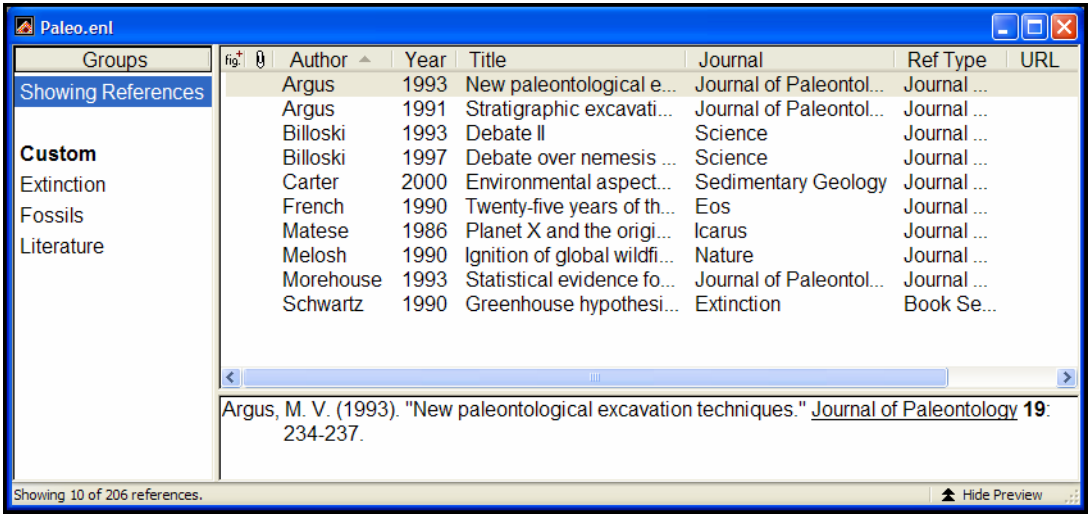
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Showing and Hiding References

When working with references in your EndNote library, you can view all of the references or just a subset. Here is an example of an EndNote library showing only 10 of the 206 references in the library. Notice the words "Showing 10 out of 206 references" at the bottom of the Library window (above the preview pane).



Working with Showing References

Some EndNote commands (such as *Search References*, *Change Field*, *Change Text*, *Sort*, *Print*, and *Export*) can work with only 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 References* command to search only the showing references. (Choose 'Search showing references" on the Search window.)
- 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 window.)
- 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.
- *Print* or *Export* only the "showing" references.

One way to view a subset of references is to use the *Search References* command as described later in this chapter. 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.

To save a set of references to a group, which you can easily display later, see "Using Groups" on page 234.

Using Show 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.

Using Hide Selected

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.

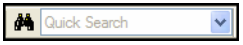
Searching for References

EndNote provides a powerful and flexible *Search References* 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 References* command to search EndNote libraries as well as remote databases that are available online. See Chapter 6 for information about online database searches.

Quick Search

To quickly search your library, use the Quick Search item on the Main toolbar.

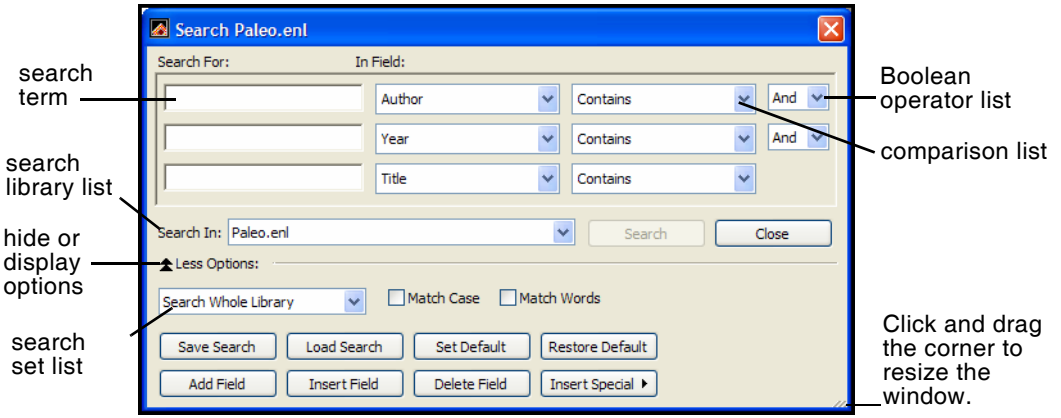


With your library list displayed, enter a word or phrase and press ENTER. EndNote executes a general search of all fields. You can use the drop-down list to select a recent search term.

If you need a more specific or complicated search, click the binocular icon to bring up the Search window. Read further for information about more complex searching.

The Search Window

To begin a search, choose *Search References* (CTRL+F) from the *References* menu or click the binocular icon on the toolbar. The **Search window** appears, displaying several empty **search lines** (you can add more if necessary).



Quick Overview of the Search Window

Functions are described in more detail in the sections that follow.

Search Line

A search line includes the text to be found (the "search term"), the field to be searched (from the *Field* list), and the comparison operator. Use the *Add Field*, *Insert Field* and *Delete Field* buttons at the bottom of the Search options window to add, insert, or delete new search lines.

Search Term

The search term is the word or phrase that you want to locate. Use the *Insert Special* button to insert a Tab or Carriage Return in the search 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 *Any Field* (meaning that *all* fields will be searched). See page 222.

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 page 223.

Boolean Operator List

The "And," "Or," and "Not" list between the search lines indicates how the search lines are to be combined. See page 226.

Search Library List

The "Search" option is where you select an open EndNote library or an online database for searching. You can switch from searching an entire online database to the subset of references in the Retrieved References window, to an existing EndNote library. See Chapter 6 for more information about online searches using the *Online Search* command.

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 entire library and displays 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 in the Search window. 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 in the Search window, you can save these searches and later load them when you need them. See page 229 for more information.

Set Default and Restore Default

Use the *Set Default* button to save the configuration of all of the items in the Search window except for the search terms. Click *Restore Default* at any time to return the window to that configuration. See page 220 for more information.

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 limit 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” on page 148 for information about entering diacritics.

Finding Carriage Returns and Tabs

Use the *Insert Special* button to insert a Tab or 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 References* command searches one library at a time. If you have more than one library open, only the library selected in the Search list will be searched. To avoid confusion, the name of the library to be searched is displayed in the title bar of the Search window.

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.

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. Leave the search term blank, choose the desired field from the Field list, and choose *Is* as the comparison operator. Click *Search* and EndNote finds references in which the chosen field is blank.

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. 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 Window

Use the *Set Default* button to save the current configuration of the Search window as your default. The default configuration will appear whenever you first open the Search window.

The layout of the window (such as the number of search lines and the shape of the window) 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 *Restore Default* option in the Search window to clear out all of the search terms currently entered in the Search window, and reset all of the settings back to the default configuration.

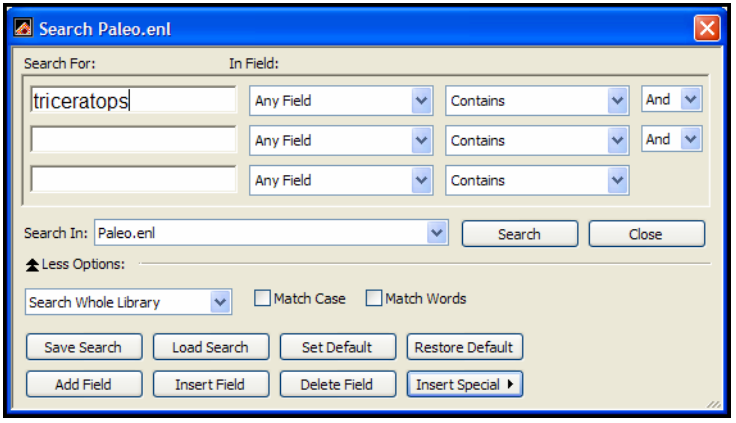
Simple Searches

Using Quick Search:

On the toolbar, type a search term into the Quick Search text box and press ENTER.

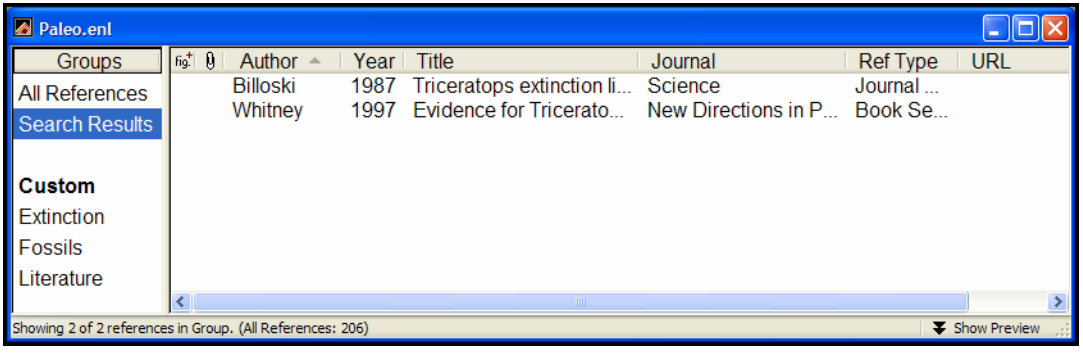
Using the Search window find all references that contain a particular term:

1. From the *References* menu, choose *Search References* (CTRL+F). Or, click the binocular icon on the toolbar.
2. Type the desired text into the first search line. This example uses the word "triceratops" as the search term.
3. Set the search field to *Any Field* and the comparison list to *Contains*.



4. 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 in the current library sort order. (Click on a column header to apply a different sort order):



The Search dialog remains on top. You can click on the title bar and drag the Search dialog to another position, you can run a new search, or you can *Close* the search dialog at any time.

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.

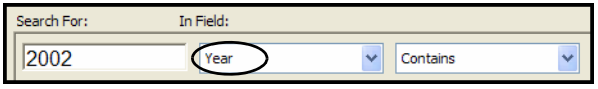
The references found in the last search operation are saved in a temporary Search Results group. Each time you run a search, the temporary Search Results group is updated with the new set of references. When you close the library, this temporary group is discarded.

Restricting Searches to Specific Fields

By default, the *Search References* command looks for a match for the search term in any of the fields in your references. This is what the phrase "In Any Field" indicates. Use the *Field* list in the Search window to narrow your search by changing *Any Field* to a specific field.

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 search is restricted to the *Year* field



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 Appendix C for a complete list of Generic field names and their corresponding field names in each reference type.

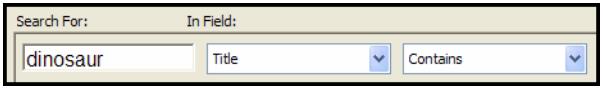
EndNote can import references from hundreds of sources, each of which uses its own set of field names. Once you have transferred references into EndNote, you will search for information by using the destination EndNote generic field names, and not the original field names from the information provider. 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.

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:



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

Search Term	Field	Comparison Operator	EndNote finds:
2000	Year	Is Greater Than	all references published after 2000
2000	Year	Is Less Than	all references published before 2000
1998	Year	Is Greater Than or Equal to	references published during or after 1998
A	Title	Is Less Than	all references where titles start with a number
C	Author	Is Less Than or Equal to	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
S	Author	Is Greater Than or Equal to	all references with authors whose last names begin with S-Z
hawaii	Title	Contains	all references with “hawaii” in the title
hawaii	Title	Is	all references with “hawaii” as the exact title
	Abstract	Is	all references with no abstract (empty field)
sediment	Title	Field begins with	all references where titles start with "sediment," including "Sediments," and "Sedimentation," but not "Synsedimentary"
dinosaur	Abstract	Field ends with	all references where abstracts end with "dinosaur," which would include "duck-billed dinosaur," but not "dinosaur extinction" or "dinosaurs"
house	Any Field	Word begins with	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 in EndNote using 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.

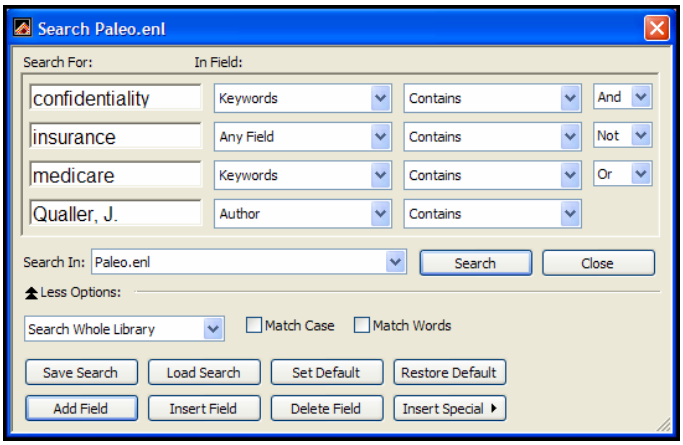
Example: A search for "triceratops" *Not* "extinction" finds all references including "triceratops," excluding any triceratops references that mentioned extinction.

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 window. For example, if you have entered four search lines in the Search window, 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.

For example, the search below could be represented as:

(((confidentiality *and* insurance) *not* medicare) *or* Qualler, J)



Adding or Deleting Search Lines

You can add or delete search lines using the *Add Field*, *Insert Field*, and *Delete Field* buttons on the Search window.

Add Field adds a new search line to the end of the list.

Insert Field inserts a new search line immediately before the selected search line.

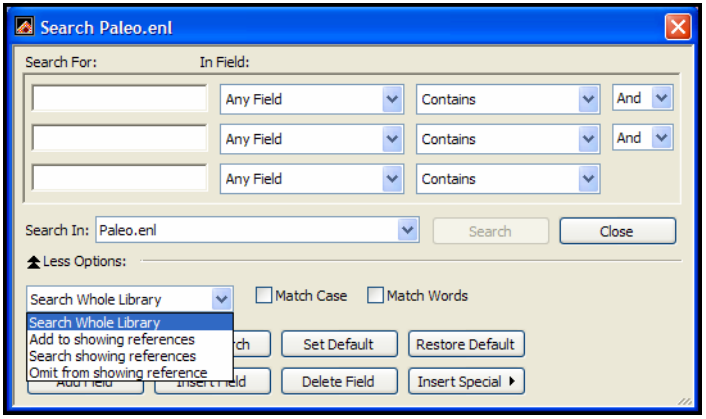
Delete Field removes the selected search line.

Move between search lines by pressing the TAB key to go forward and SHIFT+TAB to go backwards. You can also click with the mouse in the desired search line to select it.

Combining Results from Separate Searches

By default, EndNote searches the entire library 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 in the Search window.

Search Set list



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 *References* menu, choose *Search References* (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 References* from the *References* menu.
2. Choose *Omit from Showing References* from the Search Set list in the Search window.
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* buttons at the bottom of the Search window allow you to save the settings currently in the Search window and recall them for later use. Most of the options in the Search window are saved, including the search terms; however, the target of the search (the EndNote library or online database) is not saved, nor are Match Case and Match Words.

To save a search:

1. Configure the Search window as you would like.
2. Click the *Save Search* button in the Search window.
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. With the Search window open, click the *Load Search* button.
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.

If you want to save the search results (the set of matching references) as a group, see "Temporary Groups" on page 236. Remember, though, that groups are not 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

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 (based on the duplicate criteria specified in the preferences—see page 532).

To find all of the duplicate references in a library:

1. With the Library window open, go to the *References* menu and choose *Show All References*.
2. From the *References* menu, choose *Find Duplicates* and EndNote displays all duplicate references in the library.

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. See page 532 for details.

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.

Deleting Duplicates

When EndNote displays the duplicates that it has found in a library, it selects all references except for the earliest entry. For example, if you have three of the same references for a journal article, all three will be displayed, but the one that was entered into your library first will not be selected. (References with the lowest record numbers are the ones that were entered first.)

With all but the original references selected, you may choose *Delete References* from the *References* menu (or *Cut* from the *Edit* menu) to remove the duplicates from your library.

We strongly suggest that you check the duplicate references before deleting them. A more conservative approach to deleting only the selected duplicates would be to choose *Show Selected References* from the *References* menu. That displays only the references that are candidates for deletion. You may then peruse them to verify that you would like to delete them all. Once you are comfortable that these are the references to be deleted, you may choose *Select All* from the *Edit* menu, and then *Delete References* from the *References* menu.

WARNING: Before deleting duplicates, check the record numbers to be sure that you are not deleting references already cited in a paper. Use the *Display Fields* settings in EndNote's preferences to display record numbers in the Library window (see page 531). Choose *Tile* from the *Window* menu to compare references side-by-side.

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).

You can type a maximum of 255 characters. 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.

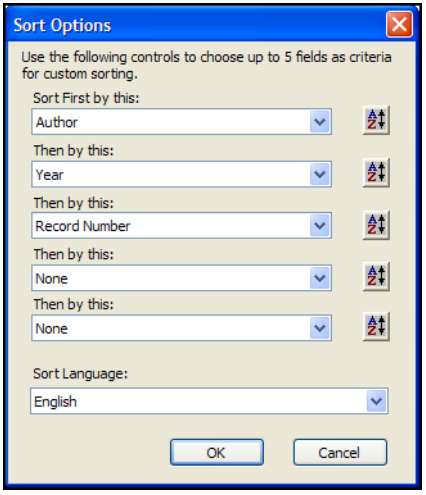
Sorting the Library

The *Sort References* command provides a way to arrange all references showing in the Library window for browsing, exporting, printing, or copying.

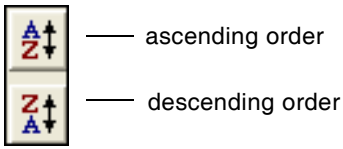
EndNote libraries are typically sorted by the author's last name and first initial, year, and record number. When you add a new reference, or modify an existing reference, EndNote automatically files it in this order. Use the *Sort References* command to change this order. The current sort order remains in effect until you change it again.

To change the sort order:

1. From the *References* menu, choose *Sort References.*
2. 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.)



3. Click the button to the right of each field to indicate ascending or descending order.



4. With the field names entered as desired, click *OK*.

The dialog shown above is 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). References by the same author in the same year would then sort by record number.

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 X, 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 initial parts of the name in order to sort the references by the principal element of the surname. See “Sorting” on page 526.

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” on page 526.

Sorting Diacritical Characters

EndNote sorts diacritical characters according to the rules of the language selected in the Sort References dialog. Characters with diacritics are sorted differently in English, Spanish, Swedish, and other systems.

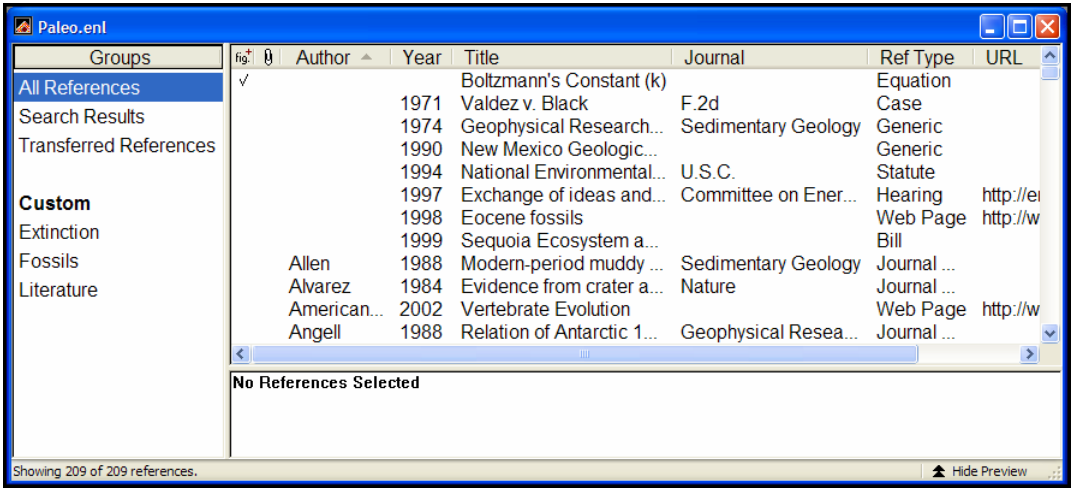
Using Groups

What are Groups?

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. There are two types of groups. Automatically generated groups include All References, Search Results, and Transferred References. Custom groups are created by the user to help organize the library.

Displaying or Hiding Groups

The left pane of the Library window lists all of the groups in the current library.



The first group listed, which is always available, is All References. All References displays all of the references in the library. Custom groups are listed alphabetically (click the Groups header to toggle between ascending and descending order). 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.

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. Use the Groups toolbar icon to toggle the display of the Groups pane on and off. Or, from the *Tools* menu, choose *Show Groups* or *Hide Groups*.

Important Points about Groups

- You can create a maximum of 50 custom groups 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.

- Deleting 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. You cannot delete a reference from the library while displaying a custom group. Highlight the reference, go to the All References view, and then delete the reference.
- 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.

Temporary Groups

There are two groups that are created automatically and are temporary; they exist only while a library is open. Both 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:

- **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.
- **Transferred References**: This group shows references transferred into the desktop library from an EndNote Web library. Each time you transfer in new references from EndNote Web, this group is replaced with the new set of references.

Because temporary groups are deleted when you close the library, so you may occasionally want to save one of them to a custom group so it is available during a later session.

To save the Search Results or Transferred References group as a custom group:

1. Click on the Search Results or Transferred References group to display the list of references in the group.
2. From the *Edit* menu, choose *Select All* to select all of the references in the list.
3. From the *References* menu, select *Add References to>New 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.

Creating a New Group

You have two options for creating a new 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.

Create a new group in one of these ways:

- From the *References* menu, select *Groups* and then *Create New Group*.
- Right click in the Groups pane of the Library window to display a contextual menu and select *New*.
- Select references in the reference list, then go to the *References* menu and choose *Add References to>New Group*.

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.

NOTE: You are limited to 50 custom groups per library. Once you reach that limit, you must delete a group before you can add a new one.

Adding References to a 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), 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 *References* menu, select *Add References to* and then select either the name of an existing custom group or *New 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 *New Group*.

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 *References* menu, select *Search References* to display the Search window.
3. If the *More Options* button is available, click it to display more search options.
4. In the search set list, select "Search showing references."
5. Enter your search strategy and click *Search*.

For more information about searching, see "Searching for References" on page 215.

Deleting References from a Group and Deleting Groups

The References menu includes a Delete command that toggles depending on the focus in the library:

- **Delete References** is available when a reference list is displayed that is *not* a custom group and one or more references are selected. This command deletes selected references from the library. They no longer exist.
- **Delete Group** is available when you display a custom group subset of the library and the focus is on the group name. It removes the group, but all of the references from the group still exist in the library.
- **Delete References from Group** is available when you display a custom group subset of the library, the focus is on the reference list, and one or more references are selected. This command removes the selected references from the group, but they still exist in the library.

To remove references from a group:

1. In the left pane of the library window, click on the name of the group.
2. In the reference list, select the reference(s) you want to delete. 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 Delete References from Group command in one of these ways:
   - Press the DELETE key on your keyboard.
   - From the *References* menu, select *Delete 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.

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:
   - Press the DELETE key on your keyboard.
   - From the *References* menu, select *Groups* and then *Delete Group*.
   - From the *References* 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.

Renaming a Group

There are several ways to rename a custom 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 *References* menu, select *Groups* and then *Rename Group*.
- Right click with your mouse on the group name to display a contextual menu, and select *Rename*.

NOTE: You cannot rename the automatically created groups: All References, Search Results, and Transferred References.

Chapter 9

Term Lists

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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.

Overview

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 page 535).

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. These points are covered in more detail later in the chapter.

- 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 X1>Terms Lists folder.

Adding Terms to a Term List

Terms can be added to the term lists using a variety of methods described in this section. Adding terms to a term list does not change any data that you have entered in your references.

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 (see below). 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

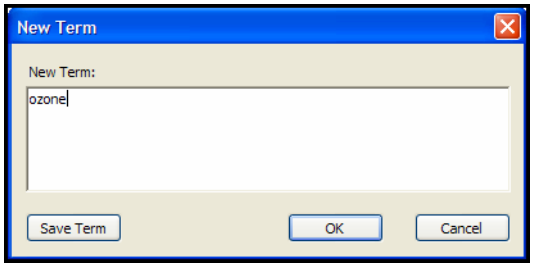
EndNote has predefined term lists for authors, keywords, and journals. When you enter multiple terms into those fields and EndNote updates the term list, it needs to know when one term ends and the next term begins. We call the punctuation that separates the terms "delimiters."

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" on page 249.

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 page 258 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 to copy.
3. On the keyboard, press CTRL+C to copy the highlighted term.
4. Open another list.
5. Click *New Term*, press CTRL+V to paste in the term, and click *OK*.

Copying Terms From Other Sources

You can copy terms from any text, and then 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, open the desired term list, click *New Term*, press CTRL+V to paste in the term, and click *OK*.

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:

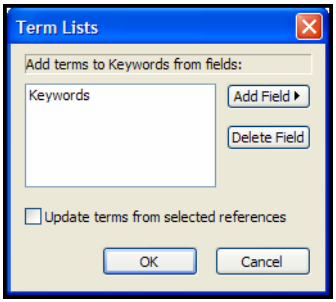
- *Update List* does not change the terms in your references; it only adds new terms from your references into the term list.
- *Update List* does not add duplicate terms to a list.
- *Update List* removes leading and trailing spaces, but does not change punctuation.
- *Update List* does not automatically 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" on page 256.

To update a term list:

If you are updating the Journals list, see page 258.

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 *Delete 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 the "Table of Predefined Reference Types" on page 399 to find the corresponding field names for the fields of various reference types.

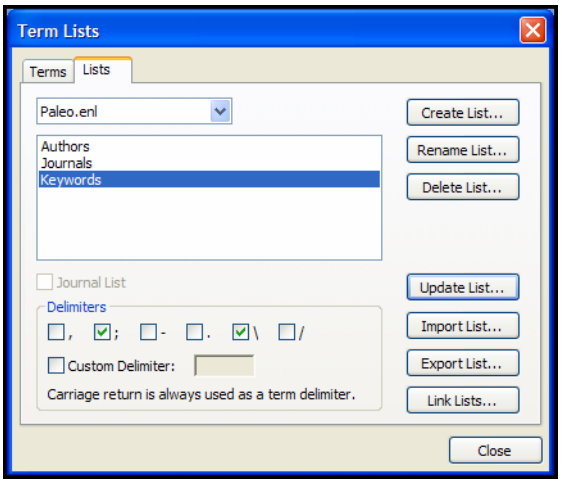
5. To update a term list from only the currently selected references in your library, check the "Update Terms From Selected References" option.

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).



Select a term list and the delimiters used for it will be marked in the Delimiters section below.

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" on page 260 and "Creating Bibliographies With Journal Abbreviations" on page 260).

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 the Journals term list. See "Loading Supplied Journal Abbreviations" on page 260 for more information.

2. Click *Import List*.
3. Select the text file to be imported and click *OK*.

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.

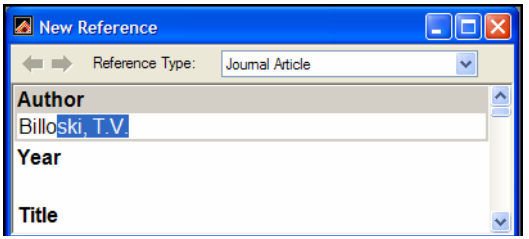
Using Term Lists for Data Entry and Searching

You can use term lists to enter terms directly into a reference or into the Search window.

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" on page 535.

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. Choose *Open Term Lists* from the *Tools* menu, and select the desired 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. Click *Insert Term* to insert the selected term(s). 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 and pasted into a record. Highlight the term in the term list, click *Edit Term*, highlight the text to copy, use the *Copy* (CTRL+C) command to copy the text, and then the *Paste* (CTRL+V) command to paste the text into your reference.

NOTE: The insertion point must be in a field in a Reference window or Search window 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 window just as they are entered into references. For example:

1. From the *References* menu, choose *Search References* (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.
3. Double-click a term to insert it into the Search window.
4. Click *Search* to search for your references.

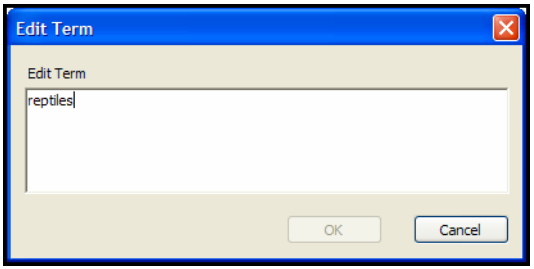
Editing Terms and Term Lists

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.

Modifying Terms

To edit a term in a term list:

1. From the *Tools* menu, choose *Define Term Lists* and select the list that contains the term to be modified. Then click on the Terms tab.
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. Deleting a term from a term list does not remove it from the references in the library.

Defining Term Lists

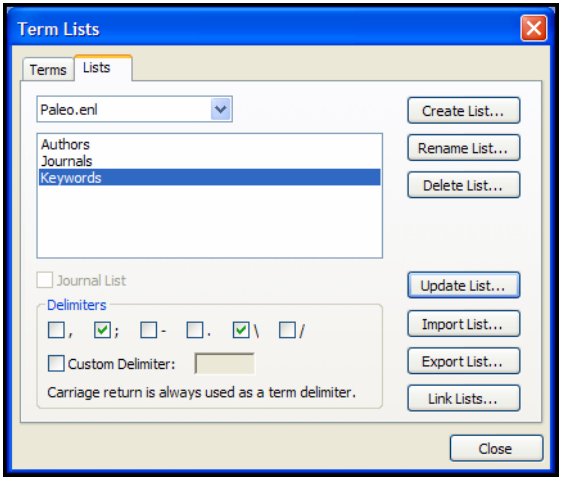
Use the *Define Term Lists* command in the *Tools* menu to create, rename or delete a term list. This command is also used to specify the punctuation that separates individual terms in a reference (delimiters).

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 (;), backslash (\), and end of line markers as separators. Words or phrases entered on different lines in a field (by pressing 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.

NOTE: Author names must always be entered one per line.

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 "Journal Names" on page 431 for a description of this feature).

   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. See "Adding Terms to a Term List" on page 244.

NOTE: New term lists must be linked to fields for the "Suggest terms as you type" and automatic updating features to work. Instructions for linking term lists to fields follow.

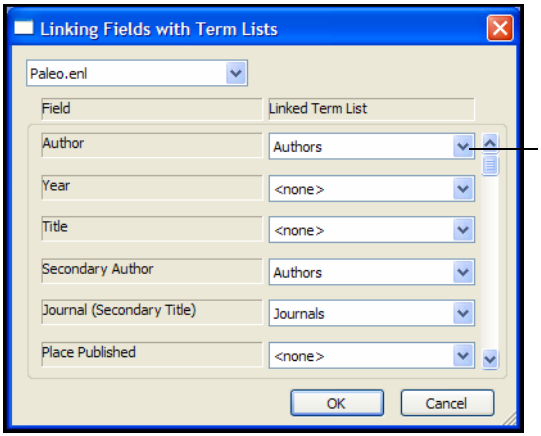
Linking Term Lists to Fields

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

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 also “Copying Terms Between Lists” on page 246).

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" on page 260).
- EndNote can remove periods from abbreviations during formatting. EndNote cannot add periods to an abbreviated journal name.

Updating a Journal List

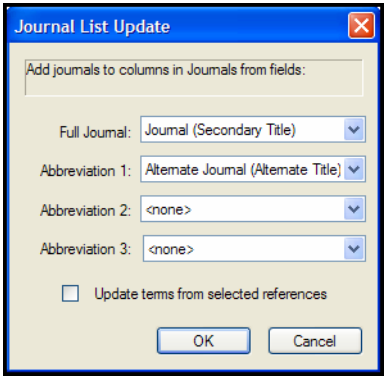
For EndNote to accurately use the abbreviated journal names in your bibliographies, it is important to be consistent when entering different formats of a journal name. The first column should always list the full journal name, and subsequent columns should store consistent formats of abbreviated names. See page 258 for more information.

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 page 535). 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 X1\Terms Lists 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 X1\Term 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. (See Chapter 15 for more information about these settings.)
5. Close and save the style. Now when you format a paper or look in the preview pane of the Library window, 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 (versions 1.0-1.3.5), 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 page 250).

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.

Chapter 10

Using EndNote with Microsoft Word

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Overview of the Cite While You Write Process

This chapter describes how to Cite While You Write™ (CWYW) with Microsoft® Word 2000, XP, 2003, or 2007 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 X1* submenu on Word's *Tools* menu, or, in Word 2007, with an *EndNote* tab.

You can start by basing your paper on a predefined Manuscript Template that is set up with publishing rules applied, as described on page 275. Then, insert a citation into the document. A bibliography formatted according to any one of hundreds 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. See "The Traveling Library" on page 324 for more information.

You can use your EndNote desktop application or EndNote Web to Cite While You Write. For more information about using EndNote Web to Cite While You Write, see "Using Cite While You Write with EndNote Web" on page 557.

Word Processor Compatibility

To Cite While You Write, you must use Microsoft Word 2000, XP, 2003, or 2007. Cite While You Write can convert and use Word documents that previously used the EndNote Add-in or earlier versions of Cite While You Write, although we recommend that you first unformat those documents.

Most versions of Word display Cite While You Write commands on a *Tools>EndNote X1* submenu. Word 2007 displays Cite While You Write commands on an EndNote tab.

If you use a word processor other than Word, or an older version of Word, save your document as an RTF file and use Format Paper. See Chapter 11.

To create a stand-alone bibliography that is not based on the citations in a paper, see "Independent Bibliographies" on page 352 in Chapter 12.

NOTE: Only one word processor at a time should be open when inserting citations and formatting documents.

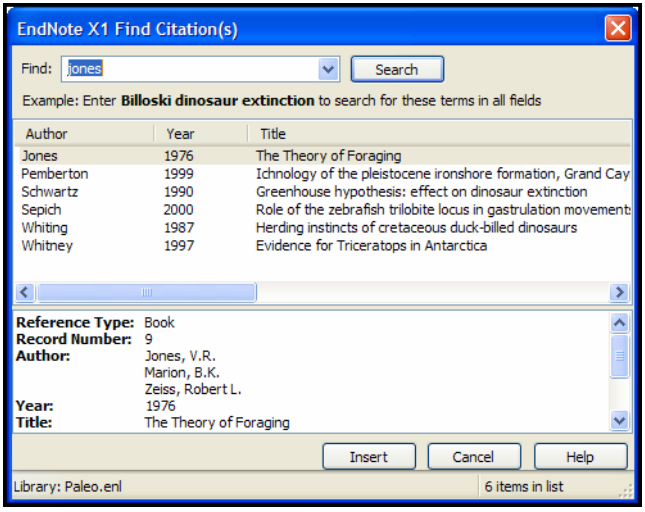
Basic Instructions

The basic steps required to cite a reference and generate a bibliography with Microsoft Word 2000, XP, 2003, or 2007 are summarized below. These procedures are described in more detail later in this chapter.

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 under "Using Predefined Manuscript Templates" on page 275.)
3. When you are ready to cite a source, position the cursor in the text where you would like to put the citation.
4. Go to the *Tools* menu in Word, then the *EndNote X1* submenu, and select *Find Citation(s)*. **Word 2007**: On the *EndNote* tab, in the *Citations* group, click *Insert Citation* and select *Find Citation(s)*.

   An EndNote Find Citations dialog appears, which shows the previous search results.



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.

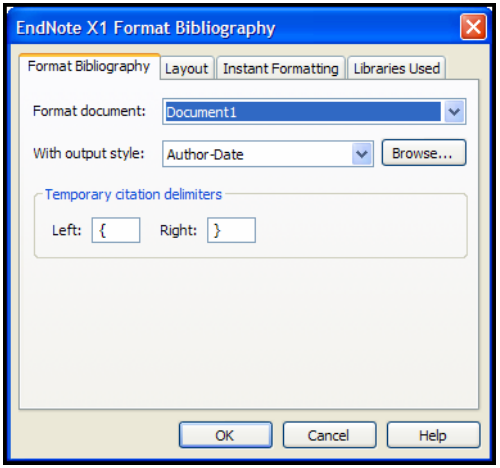
NOTE: When Instant Formatting is turned on, each time you insert a citation it is formatted and a bibliography is updated at the end of your document. When you are done inserting citations, your document is done! Instant Formatting is turned on by default. To find out more about this setting, see "Instant Formatting" on page 303.

---

9. If your citations are not automatically formatted, and a bibliography is not updated each time you insert a citation, go to the *Tools* menu in Word, then the *EndNote X1* submenu, and select *Format Bibliography*. **Word 2007**: On the *EndNote* tab, in the *Bibliography* group, click the corner arrow dialog box launcher.

   Even when Instant Formatting applies, you may want to update the bibliography in order to change the style or layout of your citations and bibliography.

   A Format Bibliography dialog appears, where you can change, or simply verify, the style and layout of the 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 temporary citations, updates formatted citations, and appends a bibliography to the end of the paper.

Your paper is ready for publication!

If you want to insert figure or table citations, see "Inserting and Formatting Figures and Tables" on page 311.

Notes about Microsoft Word

Installing Cite While You Write Support in Word

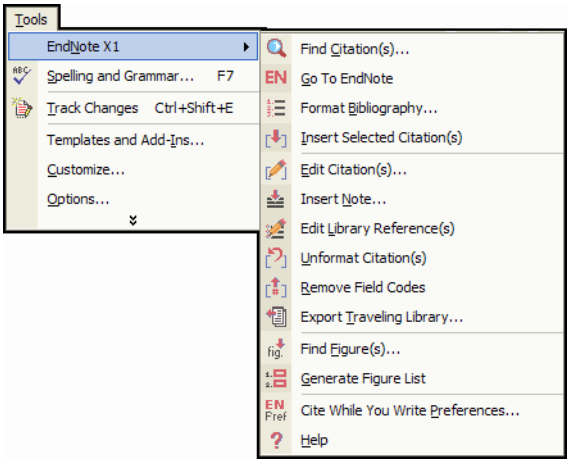
EndNote's installation program installs Cite While You Write support for Microsoft Word 2000, XP, 2003, or 2007. If you install Word *after* installing EndNote, you must either reinstall EndNote or use the "Configure EndNote" utility to install word processor support. For more information, see Chapter 2, "Installing and Upgrading EndNote."

EndNote commands appear on an *EndNote X1* submenu of the *Tools* menu in most versions of Word. In Word 2007, EndNote commands appear on an *EndNote* tab.

The Cite While You Write Commands

When Cite While You Write is installed, several EndNote commands appear on an *EndNote X1* submenu of the *Tools* menu in Word:

Word 2000, XP, or 2003 *Tools* menu and *EndNote X1* submenu



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 X1* submenu of Word's *Tools* menu:

- ***Find Citation(s)*** Search for EndNote references to select and insert as citations in your Word document. See page 282 for more information.
- ***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 page 302 for more information.

NOTE: By default, Instant Formatting is turned on, so your citations and bibliography are automatically formatted as you work.

- ***Insert Selected Citations*** Insert a citation for each reference currently selected in the open EndNote library. You can insert up to 50 consecutive in-text 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 page 298 for more information.
- ***Insert Note*** Add custom text citations to your Word document. See page 288 for more information.
- ***Edit Library Reference(s)*** Select citations in your Word document, then choose this command to directly edit the corresponding references in EndNote.
- ***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 page 299 for more information.
- ***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 page 328 for more information.
- ***Export Traveling Library*** Create an EndNote library from the references used in a paper. See page 325 for more information.
- ***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 page 312 for more information.
- ***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 page 302 for more information.
- ***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 page 543 for more information.

- ***Help*** Display help specifically 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 X1 toolbar in Word for easy access.



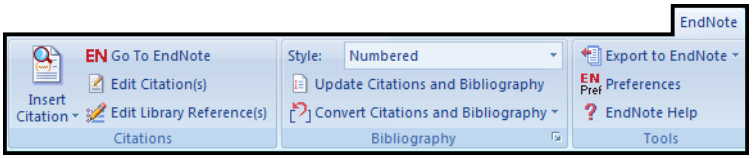
The title that appears on the toolbar indicates which EndNote application is in use to Cite While You Write: *EndNote* (your desktop application) or *EndNote Web*. For more information about EndNote Web, see Chapter 19, "Transferring Between EndNote Desktop and EndNote Web Libraries."

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.

The Cite While You Write Commands in Word 2007

When Cite While You Write is installed, several EndNote commands appear on an EndNote tab in Word 2007.

Word 2007 *EndNote* tab



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 ribbon in Word 2007.

Citations Group

- ***Insert Citation > Find Citation(s)*** Search for EndNote references to select and insert as citations in your Word document. See page 282 for more information.
- ***Insert Citation > Insert Note*** Add custom text citations to your Word document. See page 288 for more information.
- ***Insert Citation > Insert Selected Citations*** Insert a citation for each reference currently selected in the open EndNote library. You can insert up to 50 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 page 312 for more information.
- ***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 page 298 for more information.
- ***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 output 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. See page 302 for more information.
- ***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 page 299 for more information.

- ***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 page 328 for more information.
- ***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 page 302 for more information.

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 page 325 for more information.
- ***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 page 543 for more information.
- ***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 tab indicates which EndNote application is in use to Cite While You Write: *EndNote* (your

desktop application) or *EndNote Web*. For more information about EndNote Web, see Chapter 19, "Transferring Between EndNote Desktop and EndNote Web Libraries."

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

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><rec-number>11</rec-number><foreign-keys>
<key app="EN" db-id="2savvxztup2f9ressfrxea9rrze22dsd99sa">11</key>
</foreign-keys><ref-type name="Book Section">5</ref-type><contributors>
<authors><author>Schwartz, M.T.</author><author>Billoski, T.V.</author>
</authors><secondary-authors><author>B.T. Jones</author><author>Lovecraft, N.V.
</author></secondary-authors></contributors><titles><title>Greenhouse hypothesis:
effect on dinosaur extinction</title><secondary-title>Extinction</secondary-title>
</titles><pages>175-189</pages><keywords><keyword>Dinosaurs</keyword>
<keyword>Extinction</keyword></keywords><dates><year>1990</year></dates>
<pub-location>New York</pub-location><publisher>Barnes and Ellis</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!

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 not contain a copy of your EndNote library.

EndNote's Cite While You Write field codes are supported by Word 2000, XP, 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" on page 324 for instructions.

Using Predefined Manuscript Templates

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.

When you use one of the 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.

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 the next section, "Supplying Information to the Template Wizard" on page 278 for more information.)

   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" on page 279 for tips about writing in the new document.

From Within Word 2000, XP, or 2003

To use a manuscript template from within Word 2000, XP, or 2003:

1. Start Microsoft Word.
2. From Word's *File* menu, select *New*.
3. Select the EndNote tab to display the supplied templates.

NOTE: Depending on your version of Word, you may first need to display the General template tab.

4. Select the template you wish to use, select the radio button to Create a New Document, and click *OK*.
5. The EndNote manuscript template wizard will start, as described earlier, and will lead you through the process of setting up your paper.

When you complete the wizard, you are ready to start writing!

To edit a manuscript template with Word 2000, XP, or 2003:

1. Start Microsoft Word.
2. From Word's *File* menu, select *Open*.
3. Navigate to EndNote's Templates folder.
4. Select and *Open* the manuscript template you wish to modify. Template filenames end with the extension .DOT.
5. Make changes to the template, and then save a copy of the file with a new name.

NOTE: Changes to a manuscript template may disable the manuscript wizard for that template.

From Within Word 2007

To use a manuscript template from within Word 2007:

1. Start Microsoft Word.
2. In the upper left corner, click the Office button and then *New*.
3. In the Templates list, select *My templates* and click on the EndNote tab.
4. Select the template you wish to use, select the radio button to Create New Document, and click *OK*.
5. The EndNote manuscript template wizard will start, as described earlier, and will lead you through the process of setting up your paper.

When you complete the wizard, you are ready to start writing!

To edit a manuscript template with Word 2007:

1. Start Microsoft Word.
2. In the upper left corner, click the Office button and then *New*.
3. In the Templates list, select *My templates* and click on the EndNote tab.
4. Select the manuscript template you wish to modify, select the radio button to Create New Template, and click *OK*. Template filenames end with the extension .DOT.

5. Make changes to the template, and then save a copy of the file with a new name.

NOTE: Changes to a manuscript template may disable the manuscript wizard for that template.

Supplying Information to the Template Wizard

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 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

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" on page 317.

Table Lists: When you insert a figure citation where the image comes from EndNote's Chart or 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" on page 317.

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

You can enter EndNote temporary citations into a paper at any time, but most writers prefer entering citations as they write the paper rather than waiting to insert them after the text is written.

Forms of Citations

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]
```

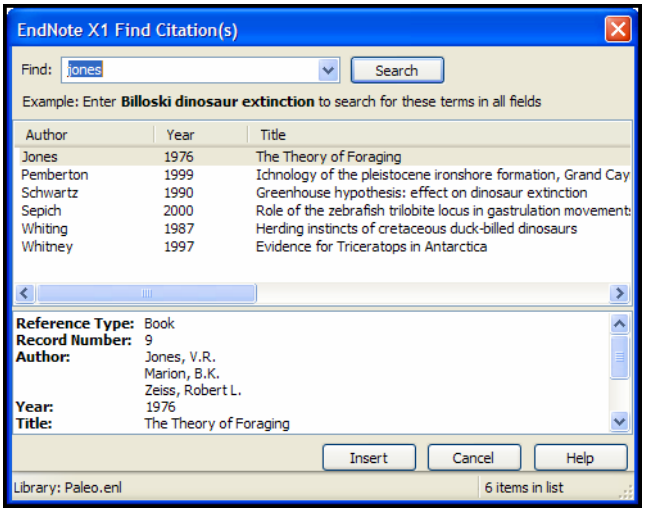
You can easily revert from formatted citations back to unformatted citations at any time. See "Unformatting Citations" on page 299.

Finding and Inserting Citations

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. From Word's *Tools* menu, select the *EndNote X1* submenu and *Find Citation(s)* to display the EndNote Find Citations dialog. **Word 2007**: On the EndNote tab, in the Citations group, click *Insert Citation* and then *Find Citation*.



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 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 "Generating Bibliographies" on page 302. In most cases, Instant Formatting applies as you insert citations.

Finding and Inserting from Highlighted Text

To find and insert a citation from highlighted text:

1. As you are typing in Word, enter text to identify the reference you wish to cite, and highlight that text.
2. From Word's *Tools* menu, select the *EndNote X1* submenu and *Find Citation(s)* to display the EndNote Find Citations dialog. **Word 2007**: 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 Citation(s) dialog as described above under "Finding and Inserting Citations."

Inserting Selected Citations

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. From the *Tools* menu in Word, go to the *EndNote X1* submenu and then *Go to EndNote*. **Word 2007**: On the EndNote tab, in the Citations group, click *Go to EndNote*.
3. Highlight the desired reference(s) in your EndNote library.
4. From the *Tools* menu in EndNote, select the *Cite While You Write* submenu and choose *Insert Selected Citation(s)*. **Word 2007**: On the EndNote tab, in the Citations group, click *Insert Citation* and then *Insert Selected Citation(s)*.

Using Drag-and-Drop or Copy and Paste

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).

Manually Inserting Citations

You can manually type temporary citations if you prefer. See "Typing Citations into Your Paper" on page 290 to learn what types of citations EndNote recognizes.

Inserting Multiple Citations

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)`

EndNote can insert up to 50 consecutive in-text citations.

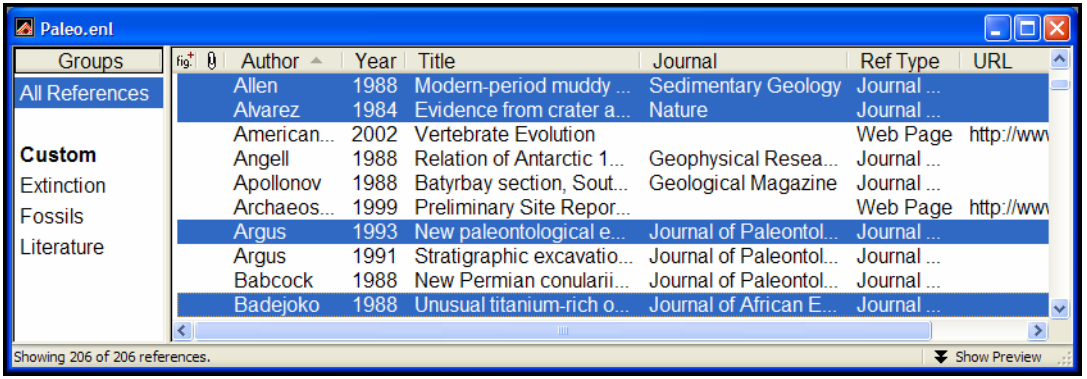
NOTE: If one of the citations in a multiple citation is not matched during formatting, the entire citation remains unformatted. Notes cannot be inserted as part of a multiple citation.

To insert multiple citations from Word:

1. From the *Tools* menu in Word, go to the *EndNote X1* submenu and select *Find Citation(s)*. **Word 2007**: 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 *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. From EndNote's *Tools* menu, go to the *Cite While You Write* submenu and choose *Insert Selected Citation(s)*.

Word 2007: 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.

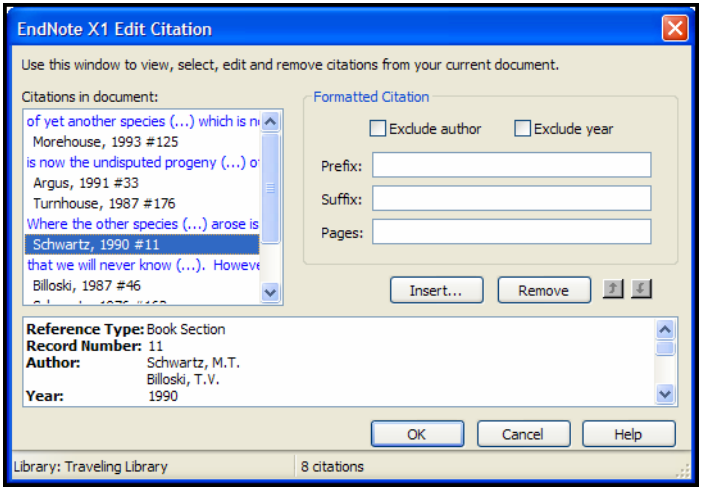
Unformatted: `{Hall,1988 #77}{Baker, 1988 #16}`

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. From Word's *Tools* menu, go to the *EndNote X1* submenu and *Edit Citation(s)* to display the EndNote Edit Citation dialog. **Word 2007**: 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 on page 286.

Inserting From Multiple Libraries

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 in the "Preferences" chapter on page 529.

Customizing Individual Citations

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:

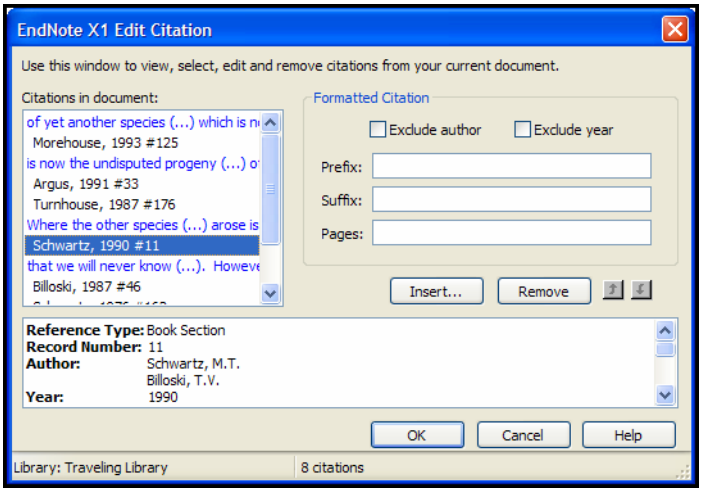
```
the discovery (Hall, 1988 p.4)
```

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 Word's *Tools* menu, go to the *EndNote X1* submenu and *Edit Citation(s)* to display the EndNote Edit Citation dialog. **Word 2007**: 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. For information about how to modify your output style to include Cited Pages, see Chapter 15.

6. Click *OK* to implement the change(s) to the citation.

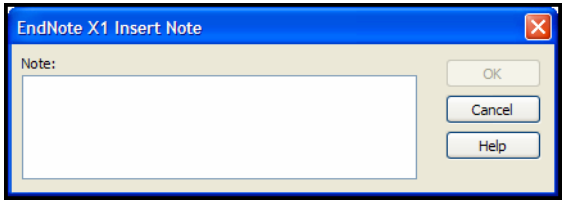
Including Notes in the List of References

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. From the *Tools* menu, go to the *EndNote X1* submenu and select *Insert Note* to display the EndNote Insert Note dialog. **Word 2007**: 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 (see page 523).

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 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

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

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 Chapter 15 for more information, and "Bibliography and Footnote Templates" on page 415.

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" on page 286. Or, if you are manually typing citations, see "Citing Specific Page Numbers in Footnotes" on page 295.

Typing Citations into Your Paper

There are many ways to insert citations in your paper, as discussed previously in this chapter. 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 this section 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 X1* menu (or the EndNote tab in Word 2007) 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

- 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 page 524). 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" on page 293.)

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 "Customizing Individual Citations" on page 286.

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 "Customizing Individual Citations" on page 286.

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" on page 523 for more information.

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 & 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. See "Customizing Individual Citations" on page 286.

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. See Chapter 15 for more information about EndNote's styles.

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" on page 295 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" on page 294.)
{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

You can change citations at any time. After making changes, choose *Format Bibliography* to (re)format the new or modified citations and regenerate the bibliography.

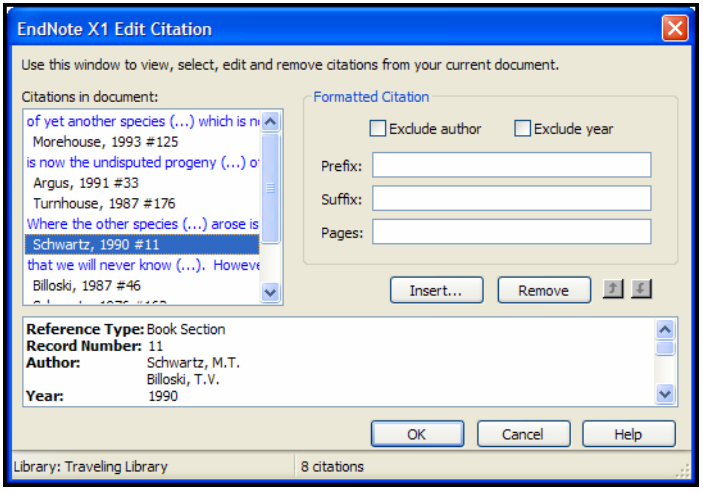
Editing Citations

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).

To safely edit a formatted citation:

1. Click on the citation you wish to change.
2. From Word's *Tools* menu, go to the *EndNote X1* submenu and *Edit Citation(s)* to display the EndNote Edit Citation dialog. **Word 2007**: 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, choose *Format Bibliography* to (re)format the new or modified citations and regenerate the bibliography. **Word 2007**: 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

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 the 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. From Word's *Tools* menu, go to the *EndNote X1* submenu and *Unformat Citation(s)*. **Word 2007**: 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" on page 328.

NOTE: When you unformat citations, Instant Formatting is disabled. To format your paper, go to the *Tools* menu, then the *EndNote X1* submenu, and choose *Format Bibliography*. **Word 2007**: 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

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

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 all associated codes, you could corrupt your document.

To safely delete a formatted citation:

1. Highlight the citation you want to delete.
2. From the *Tools* menu in Word, go to the *EndNote X1* submenu and select *Edit Citation(s)* to display the EndNote Edit Citation dialog. **Word 2007**: 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). 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

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.

Basic Instructions

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 turned on 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. From the *EndNote X1* submenu on the *Tools* menu, select Format Bibliography. **Word 2007**: 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 EndNote tab, in the Bibliography group. 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. From the *Tools* menu in Word, go to the *EndNote X1* submenu and select *Format Bibliography*. **Word 2007**: 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

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 X1* menu (or the EndNote tab in Word 2007) 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 X1* menu (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 XP or Word 2007, smart tags must be enabled (they are turned on by default).

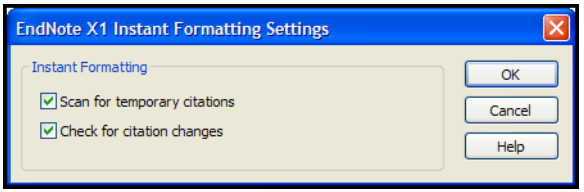
To verify that Smart Tags are enabled:

- **Word XP**: Go to the *Tools* menu and choose *Auto Correct Options*. Click on the Smart Tags tab. Select the check box titled "Label text with smart tags." In the list of Recognizers, make sure "Cwyw Citation Recognizer" is selected.
- **Word 2007**: 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. From the *Tools* menu in Word, go to the *EndNote X1* submenu and select *Format Bibliography*. **Word 2007**: 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" on page 543.

Formatting the Bibliography and/or Changing Bibliography Settings

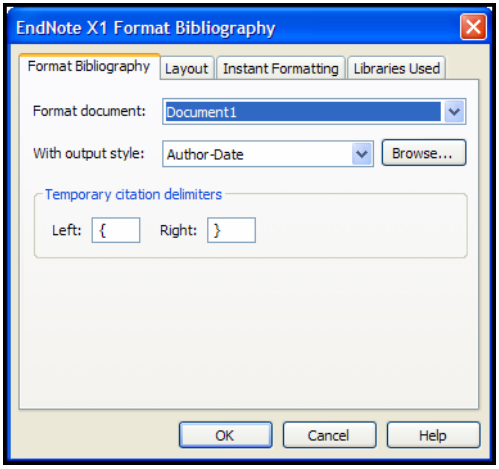
You may be halfway through inserting citations, or you may have finished writing your paper. You may have instant formatting enabled, or you may have manually inserted citations with formatting disabled. It doesn't matter. As long as you have citations entered in your document, you can format your paper 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. See "The Traveling Library" on page 324 for more information.

To format citations and generate a bibliography:

1. From the *Tools* menu in Word, go to the *EndNote X1* submenu and select *Format Bibliography*. **Word 2007**: On the EndNote tab, in the Bibliography group, click the bottom corner arrow.

2. On the Format Bibliography tab, change or verify these settings:

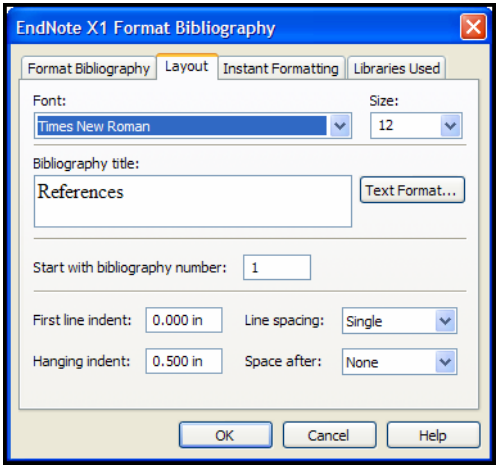


Format document: Make sure the appropriate Word document is selected from the list of open Word documents.

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" on page 306.

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 the Instant Formatting section above for more information.
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**: An easier option is to go to the EndNote tab, look in the Bibliography group, and simply select a new Style.

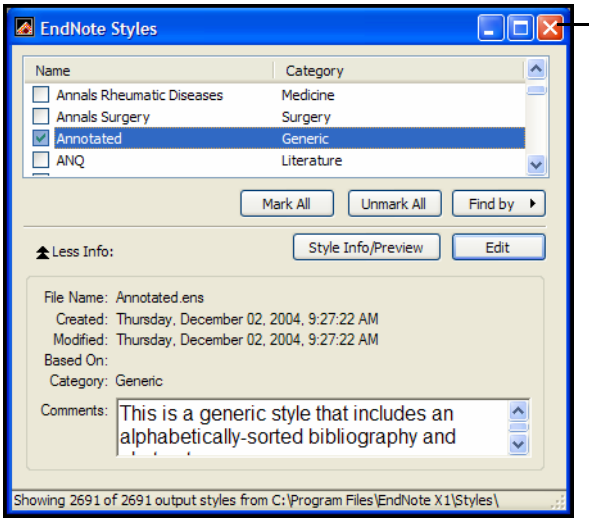
Adding Styles to the Output Styles List

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.

If you do not see the style that you want to use listed in the *Output Style* list:

1. In EndNote, go to the *Edit* menu, choose *Output Styles*, and then select *Open Style Manager*.

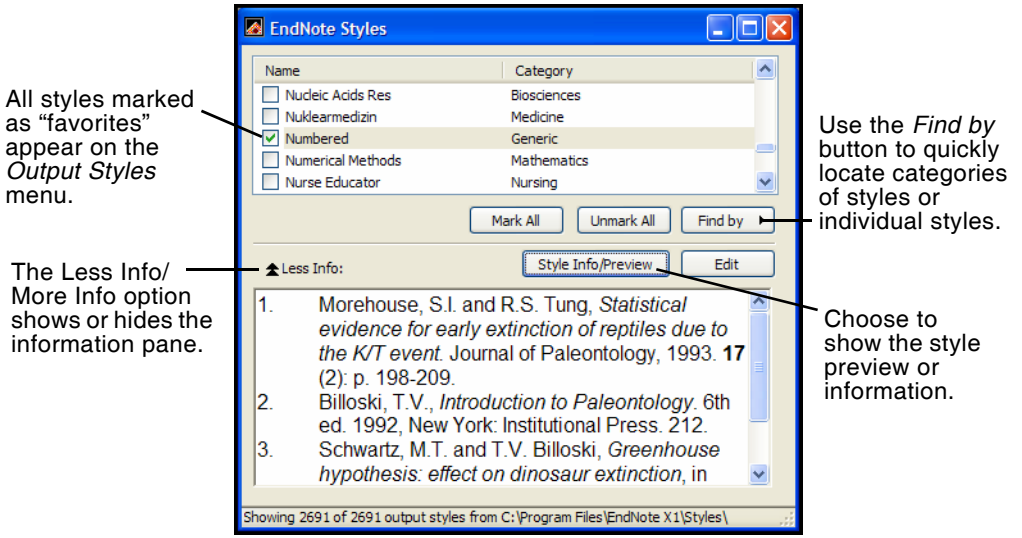


2. Find the style that you need.

   - 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.
   - 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.
   - Use the *Find* button in the Style Manager window to find entire categories of styles. For example, click the *Find* 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 Word.

All styles can be modified to meet your specifications. You can also create completely new styles if necessary. See Chapter 15 for instructions about creating and modifying styles.

Reformatting Papers

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**: 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

Similarly, if you would like to reformat your paper in a different style, go to the *Tools* menu, then the *EndNote X1* submenu, and choose *Format Bibliography* again. Select a new style from the Format Bibliography dialog and click *OK*. **Word 2007**: You can select a new Style in the Bibliography group, or click the corner arrow to bring up the Format Bibliography dialog.

Your citations and bibliography are updated for the new bibliographic style. See "Adding Styles to the Output Styles List" on page 306 for information about expanding the list of available styles.

Creating a Bibliography from Multiple Documents

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.

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 *Tools* menu, then the *EndNote X1* submenu, and choose *Unformat Citations* to unformat all of the citations in the document. **Word 2007**: 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. From the *Tools* menu, go to the *EndNote X1* submenu and select *Format Bibliography*. **Word 2007**: 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.

Directly Editing Bibliographies

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 have 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 the Styles chapter (Chapter 15) for instructions about editing styles.

Moving Bibliographies

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

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

Once figures 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.

Notes About Formatting Figures and Tables

- Do not use Microsoft Word Captioning in conjunction with EndNote figure captioning or in-text citations.
- Figures found in the *Chart or 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 "Placing Figures and Tables" on page 317.
- 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**: 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) again.

Finding and Inserting Figures and Tables

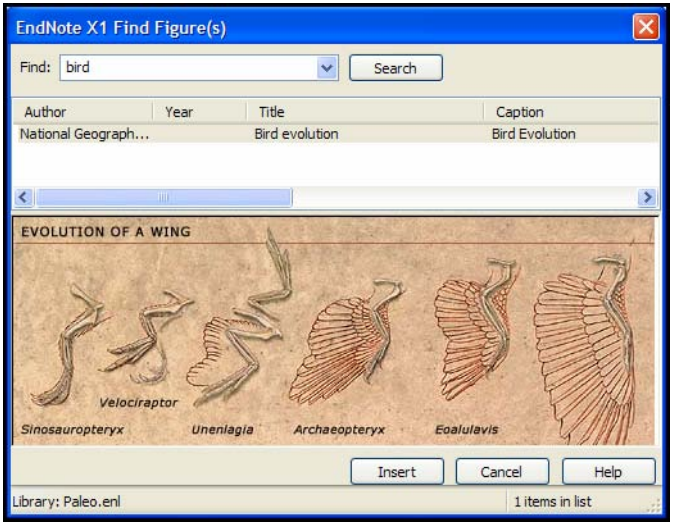
You can search EndNote references and insert a graphic or file from the Figure field of a reference into your Word document. The Figure field in your references may be titled Figure or have a custom name assigned by you.

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. From Word's *Tools* menu, select the *EndNote X1* submenu and *Find Figure(s)* to display the EndNote Find Figures dialog. **Word 2007**: On the EndNote tab, in the Citations group, click *Insert Citation* and then *Find Figure*.



4. In the *Find* text box, 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 *Search*, and EndNote compares the text to text in your EndNote references and lists each matching reference that contains a figure.

   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 *Search* again.

EndNote places an in-text figure citation at the cursor location and inserts and labels the figure itself. For example:

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)



Figure 1. Marrella splendens

NOTE: Figures found in the *Chart or 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" on page 453 for more information.

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 as described next. **Word 2007**: On the EndNote tab, in the Bibliography group, choose *Update Citations and Bibliography*.

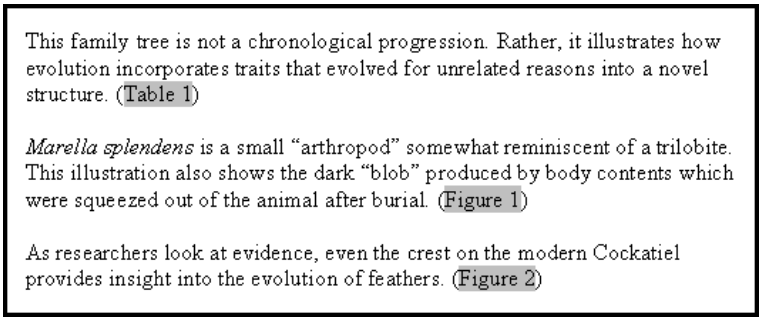
Updating Figures and Tables

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.

From Word's *Tools* menu, select the *EndNote X1* submenu and choose *Generate Figure List*. Or, click the *Generate Figure List* button on the CWYW toolbar. **Word 2007**: 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)

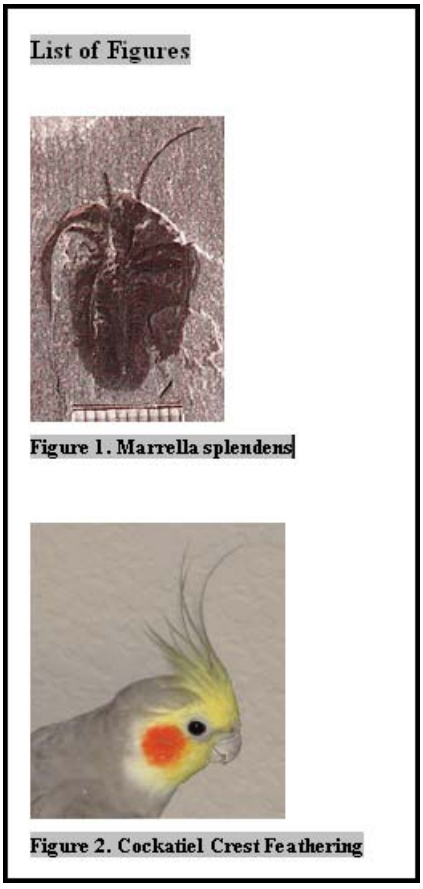
EndNote also inserts and displays the actual figures (graphics, figures, tables, charts, equations, or files) and labels them with figure or table numbers (to match each in-text reference) and Caption text (up to 245 characters from the Caption field in the EndNote reference).

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**: 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.

A figure list at the end of the document:



Placing Figures and Tables

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: Figures from any reference type other than Chart or Table are inserted and formatted as Figures. Figures from the Chart or Table reference type are inserted and formatted as Tables. Both are inserted with the *Find Figures* 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" on page 453. The Figures panel determines the placement of figures and their captions, the Tables panel determines the placement of tables (figures from the Chart or 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, go to *Tools>EndNote X1>Format Bibliography*. **Word 2007**: 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" on page 545 for information about Cite While You Write preferences that affect Figures and Tables.

Moving Figures and Tables

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. (These commands are found in a Clipboard group in Word 2007.) You could also use drag-and-drop to move a figure citation.

3 Move the cursor to the new location.

4. *Paste* the Clipboard contents at the new location.

5. From the *Tools>EndNote X1* menu, select *Generate Figure List* to renumber the in-text citations and update figures and tables. **Word 2007**: On the EndNote tab, in the Bibliography group, select *Update Citations and Bibliography.*

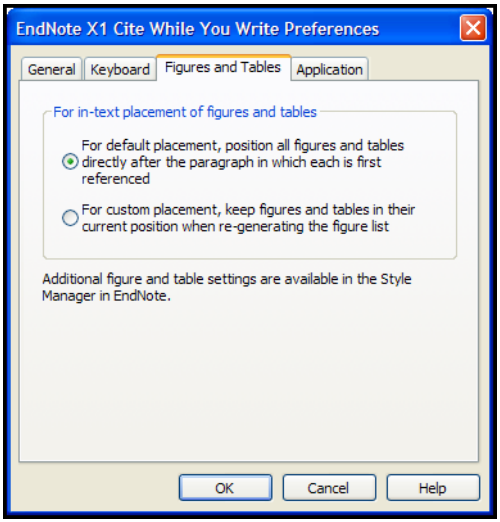
   The selected output style determines whether figures and tables appear directly after the paragraph where cited or in a list at the end of the document. To modify this section of your output style, see "Figures and Tables" on page 453.

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. In Word, go to the *Tools* menu and select *EndNote X1>Cite While You Write Preferences*. **Word 2007**: 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. From the *Tools* menu, select *EndNote X1>Generate Figure List*. **Word 2007**: 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 always 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), 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

To delete a figure or table citation:

1. Highlight the entire citation, including the surrounding parentheses.
2. Press Backspace or Delete.
3. From the *Tools>EndNote X1* menu, select *Generate Figure List* to renumber the remaining in-text figure and table citations and update the formatted figures and tables. **Word 2007**: 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**: 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

For information about output style settings that affect the placement of figures and tables, see "Figures and Tables" on page 453.

For information about Cite While You Write preferences that override output style settings for figures and tables, see "Figures and Tables in Word" on page 545.

Setting Cite While You Write Preferences

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 Word's *Tools* menu, go to the *EndNote* submenu and select *CWYW Preferences.* **Word 2007**: On the EndNote tab, in the Tools group, select *Preferences*.
- From EndNote's *Tools* menu, go to the *Cite While You Write* submenu and select *CWYW 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. See "Cite While You Write Preferences" on page 543 for detailed information about these preferences.

For information about other EndNote preferences that directly affect Cite While You Write, see "Temporary Citations" on page 523 and "Formatting" on page 529.

Making Changes to the EndNote Library

Once you have inserted and formatted citations in Word, changes to the corresponding EndNote library could affect reformatting.

Finding Cited References in a Library

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. From the *Tools* menu in Word, go to the *EndNote X1* submenu and select *Edit Library Reference(s)*. **Word 2007**: 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

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 X1* 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 field codes.

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

You can directly share your Word 2000, Word XP, Word 2003, or Word 2007 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 2000, XP, 2003, and 2007.

The Traveling Library

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. From the *Tools* menu, go to the *EndNote X1* submenu and choose *Export Traveling Library*. **Word 2007**: 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 Citations to EndNote

Word 2007 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 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 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 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

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 2000, XP, 2003, and 2007). 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) 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" on page 299.) 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" on page 328 for more information.

NOTE: Cite While You Write codes are directly compatible between Word 2000, XP, 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 EndNote library.

Submitting the Final Paper to a Publisher

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 next.

Removing Field Codes

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. See "The Traveling Library" on page 324 to learn more about the Traveling Library.
- 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. From the *Tools* menu, go to the *EndNote X1* 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. From the *File* menu, *Save* the document. **Word 2007**: Click the Office icon and then *Save*.

   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.

Chapter 11

Scanning and Formatting RTF Files

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Scanning and Formatting RTF Files

This chapter describes how to create formatted citations and bibliographies for your papers *without* using Cite While You Write™ for Microsoft® Word.

Word Processor Compatibility

This chapter describes how to cite references and create bibliographies for documents that can be saved as RTF, including documents created with:

- Microsoft® Word
- WordPerfect®
- OpenOffice
- Adobe® FrameMaker®
- StarOffice™
- Microsoft® Works
- WordPad
- Almost any application that can save as RTF (Rich Text Format)

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 2000, XP, 2003, or 2007, see Chapter 10. While you *can* use the Format Paper command described in this chapter to format Word files, 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 "Creating an Independent Bibliography" in Chapter 12.

For up-to-date compatibility information, see our website at http://www.endnote.com.

Basic Instructions

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. You create your paper and insert citations with your word processor. When you are ready to scan and format citations, 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 Paleo documents found in the EndNote X1\Examples folder. We recommend experimenting with the Paleo.RTF file along with the Paleo library.

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 Paleo.RTF found in the EndNote X1\Examples folder.

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 "Switching Between EndNote and a Word Processor" on page 337 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 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:

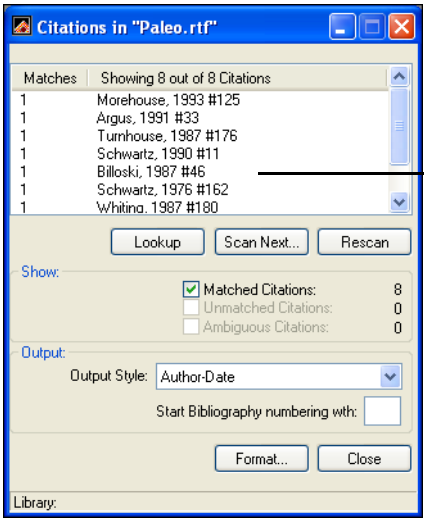
9. Return to EndNote.
10. From the *Tools* menu, go to the *Format Paper* submenu and then *Format Paper*.
11. Navigate the file dialog to locate and select the RTF document you just saved.

    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.

Numbers in the Matches column show how many references in your library match each citation. Each citation should have a single match.



These citations were taken directly from a paper EndNote scanned.

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" on page 306 for details.

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 using ALT+TAB (see page 337 if you need additional help with this step).
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" on page 343.

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. See "Temporary Citations" on page 523.

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 "Library Preferences" on page 519.)
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.

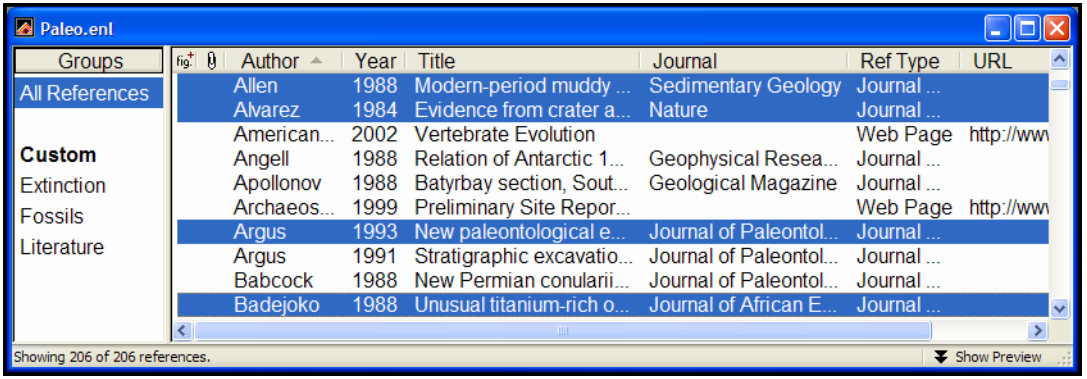
When you see the name of the program you want, release both keys.

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

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. See Chapter 15 for more information.

Typing Citations into Your Paper

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 the following sections in Chapter 10, "Using EndNote with Microsoft Word."

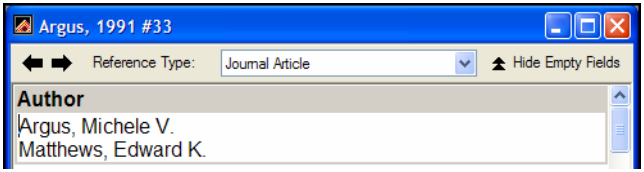
- "Notes About Temporary Citations" on page 291
- "Components of a Temporary Citation" on page 291
- "Omitting Authors or Years from Citations" on page 293
- "Citation Prefixes" on page 294
- "Citation Suffixes" on page 295
- "Including Semicolons & Other Citation Delimiters in a Citation" on page 295
- "Examples of Modified Citations" on page 297

Record Numbers

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 #11}
```

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" on page 531 for details.

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

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 on 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 Citation Matches 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 Citation 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

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 Citation Matches window after choosing *Format Paper*. You can always *Format Paper* to select a different style and reformat your unformatted (original) RTF document at any point.

The EndNote Styles collection includes more than 2,800 styles, all of which can be modified to meet your specifications. You can

also create completely new styles if necessary. Related sections in this manual:

- See "Adding Styles to the Output Styles List" on page 306 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 Chapter 15.

Previewing Formatted References (or Styles)

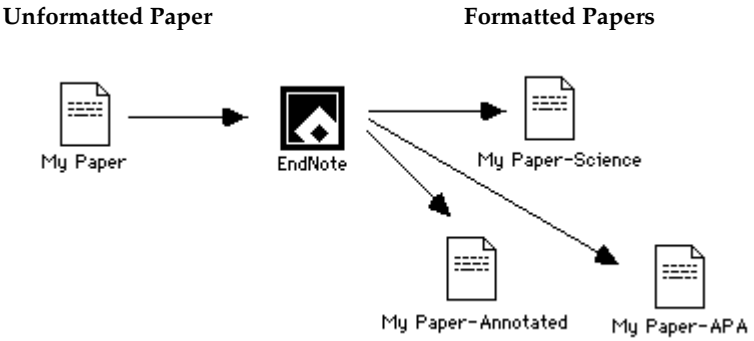
The preview pane in the Library window displays how the currently selected reference will be formatted in the bibliography by the current style. This preview pane only shows one reference at a time.

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. Either use the Windows Clipboard Viewer to view the formatted references, or paste the references into a word processor document to view the references and assess the formatting results of a style.

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 2,800+ 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*.

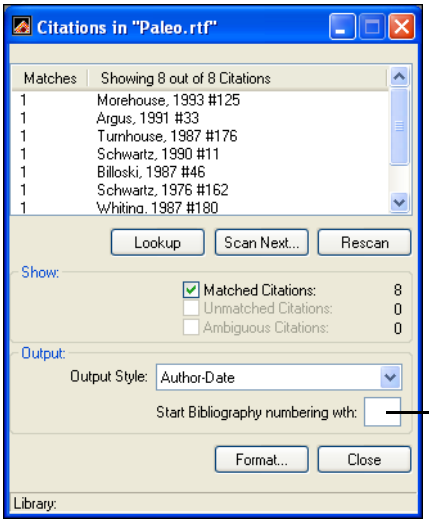
During the formatting process, EndNote makes a formatted copy of each paper and puts a cumulative bibliography at the end of the last paper. Only the last paper in the series will include the bibliography. By default, each formatted paper retains its original name with the style name incorporated into it, however you have the option to change the names.

Specifying the Starting Number of a Bibliography

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 toolbar.
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 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

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.

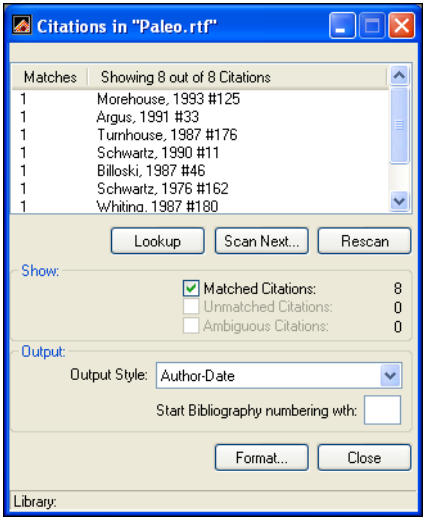
If citations have been inserted into one document from multiple libraries, all of the necessary libraries must be opened in order for EndNote to format the paper correctly.

NOTE: Read about the "Merge Duplicates in Bibliography" preference in the "Preferences" chapter on page 529 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.

Chapter 12

Creating an Independent Bibliography

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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:

- Use 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
- 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" on page 306. For information about modifying styles, see Chapter 15.

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 *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 below.

NOTE: Dragging with the CONTROL key pressed transfers the formatted references to the word processing document. If you do not hold down the CONTROL 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) text.

To copy formatted references from EndNote and paste them into a word processing document:

1. From EndNote's *Edit* menu, go to the *Output Style* submenu 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 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.

Supported Formats

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.
- **Rich Text Format (RTF)**
  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 (Hyper Text 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; figures are not included. However, if you import the references back into an EndNote library, you can restore figures by copying the figure files from the original library's .DATA folder into .the DATA folder for the new library.

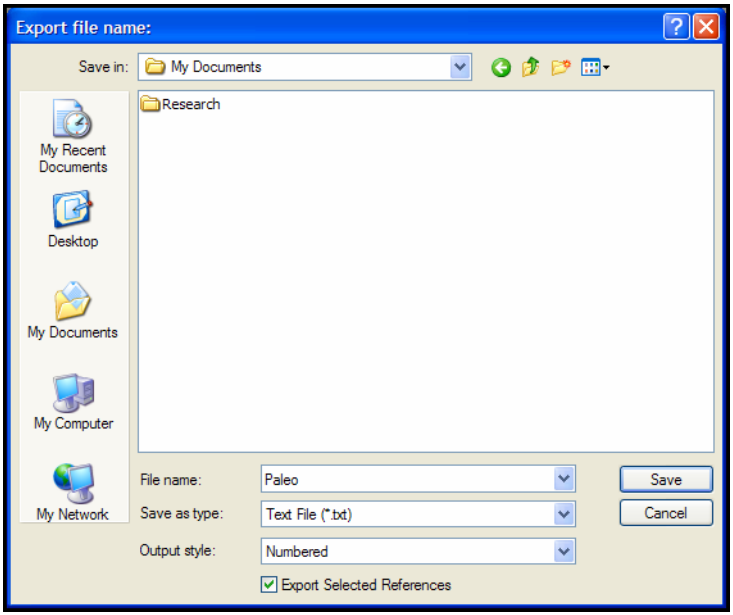
Using the *Export* Command

You can export either all references in the current list, or only the selected (highlighted) references in the current list.

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 References, 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 are 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 as Type" list at the bottom of the dialog, select the type of file to be exported: Text File, Rich Text Format, HTML, or XML.
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.



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 website. In your Web browser, set encoding to “Unicode-UTF 8” to appropriately display extended Unicode characters.

NOTE: The *Export* command exports only text; figures are not included.

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

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 the references showing in the Library window, change the print range option to *All*.
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. 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 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.
4. 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, 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 EndNotes 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.

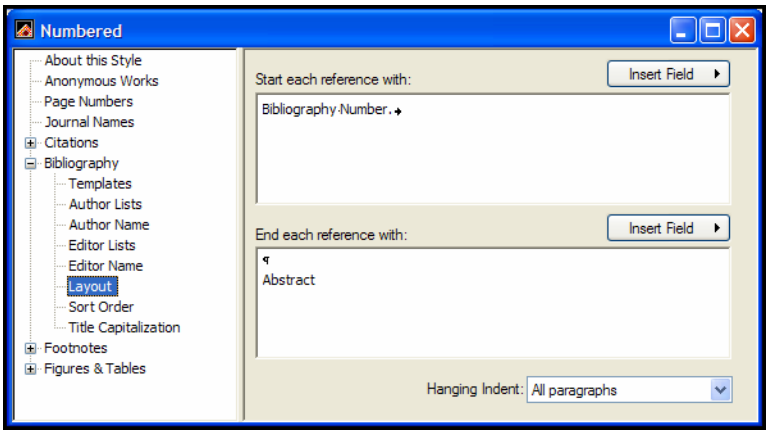
See Chapter 15 for detailed information about editing and creating styles. What follows here are two examples of common ways you might want to edit styles for your printouts or for stand-alone bibliographies.

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 on 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 in the preview pane of the Library window.

Chapter 13

Creating Subject Bibliographies and Subject Lists

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Overview

This chapter explains how to 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

Basic Procedure

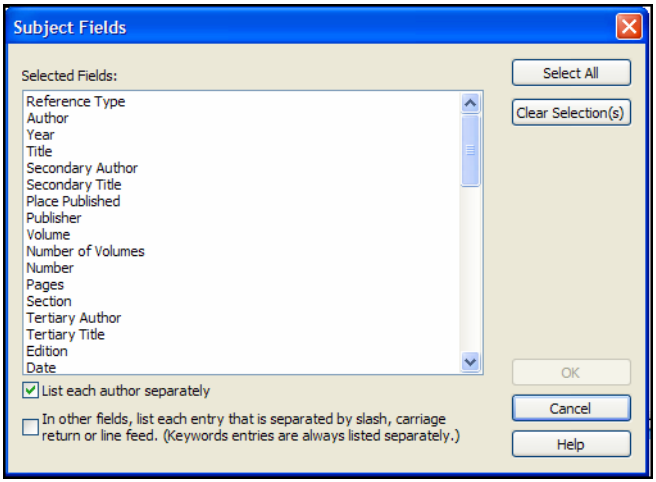
This section walks through the basic steps to create a subject bibliography.

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.

- From the *References* menu, choose *Search References* 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.

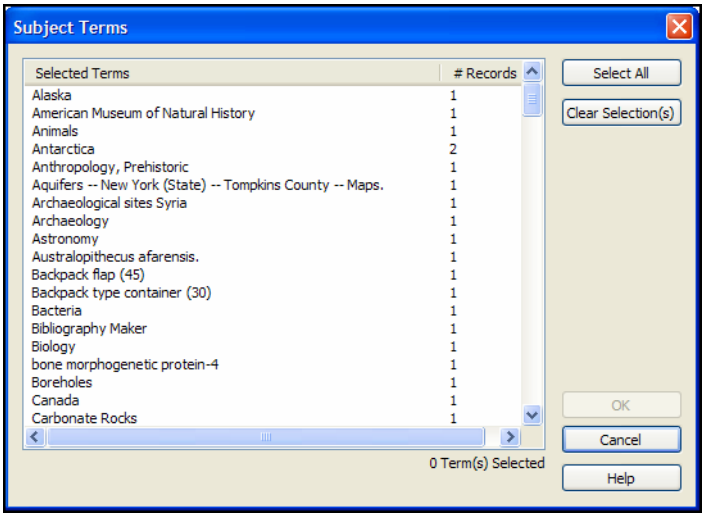
2. From the *Tools* menu, select *Subject Bibliography* to display a list of the EndNote fields by default field name.



3. 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.
4. 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.

5. Click *OK* to display the terms found in the fields you selected.



6. 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.
7. 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.

---

8. 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 (all four tabs are discussed later in this chapter under

"Subject Bibliography Settings"), 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.

9. 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.

---

10. *Close* the Subject Bibliography window when you are done viewing it.

Printing a Subject List

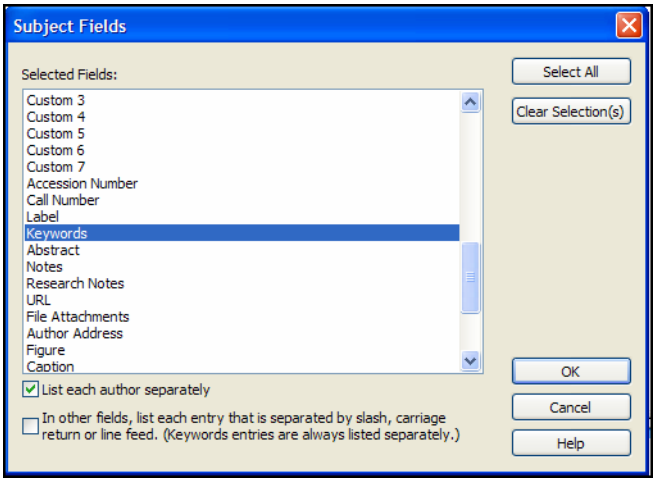
A subject list is a sorted list of unique terms (words or phrases) that occur in particular fields of the records you choose. You can base a subject list on any EndNote field or combination of fields.

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.

- From the *References* menu, choose *Search References* 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. From the *Tools* menu, choose *Subject Bibliography*. A Subject Fields dialog appears, listing the EndNote fields by default field name.
3. Highlight the field(s) whose contents you wish to use as subject headings.

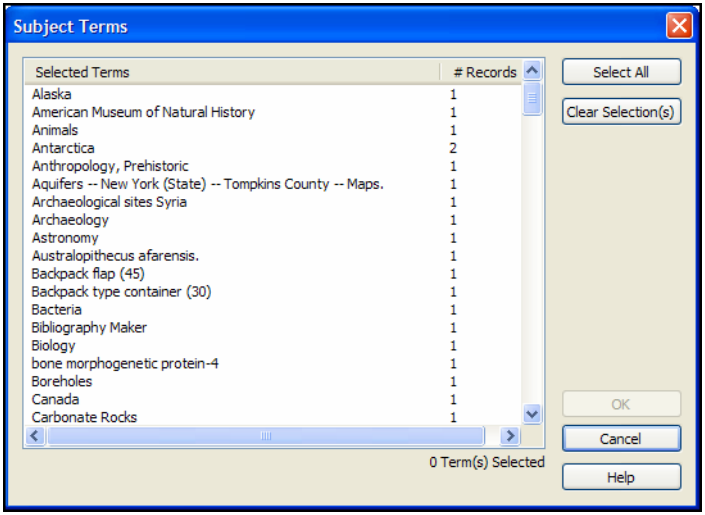


- You can include any number of fields.
- If you build the list from more than one field, the terms generated from the fields are combined into a single list.
- To quickly select all fields or clear all fields, use the buttons to the right of the dialog.
- Click on individual fields to select or deselect them.

4. 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.

5. Click OK to display the terms found in the field(s) you selected.

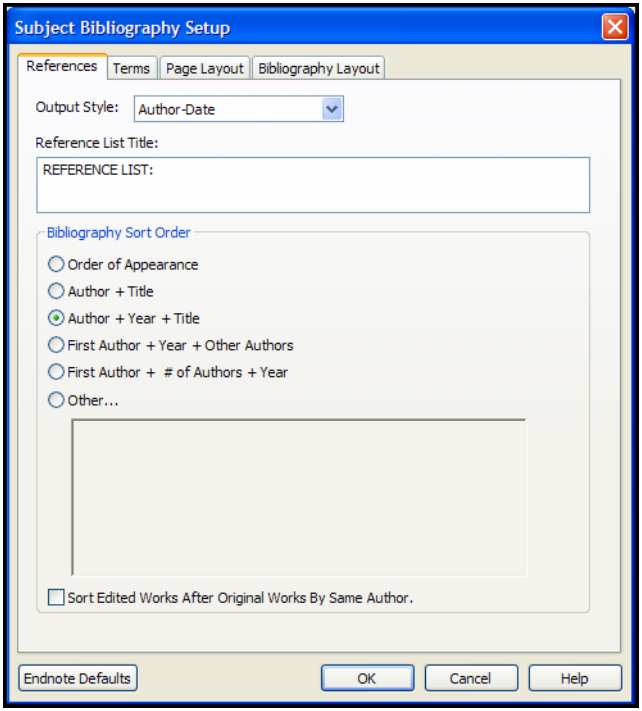


6. Select the terms you want in the subject list.

   - 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.

7. 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.

8. Click the *Layout* button to display the Configure Subject Bibliography dialog.



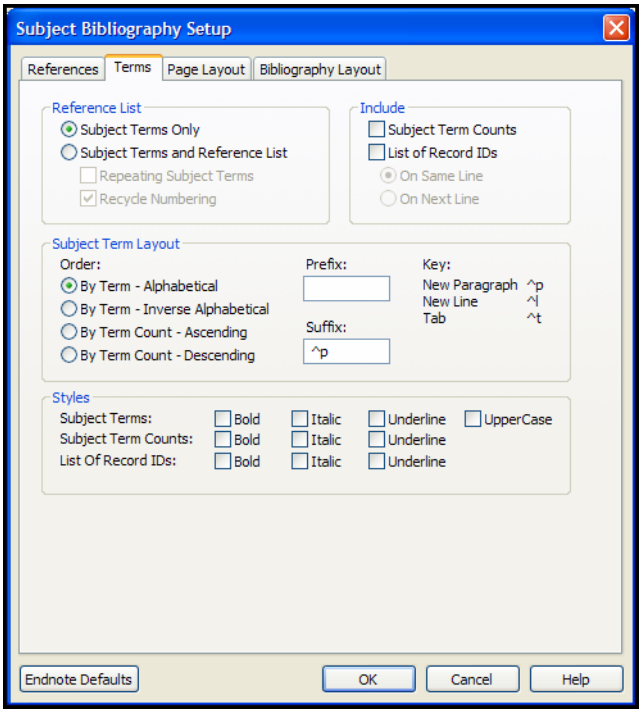
9. On the References tab, enter a Reference List Title, which will print at the top of the list.

   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.

10. 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.

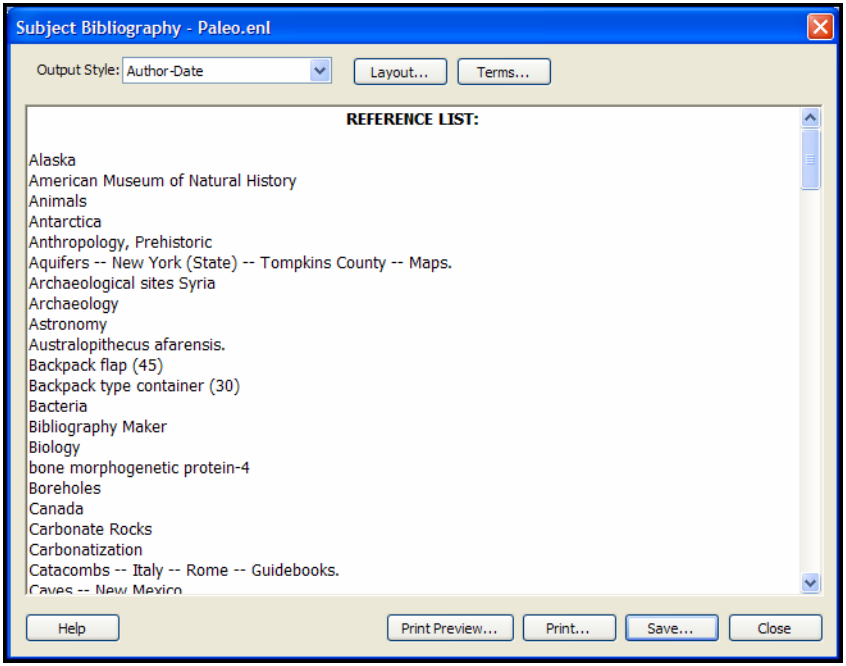


11. Click on the Page Layout tab if you wish to change the font, size, or page margins.

NOTE: The Bibliography Layout tab applies to subject bibliographies only, and does not affect a simple subject list.

---

12. Click *OK* to save changes to the dialog and update the list in the Subject Bibliography window.



If the window still does not 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.

13. 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.

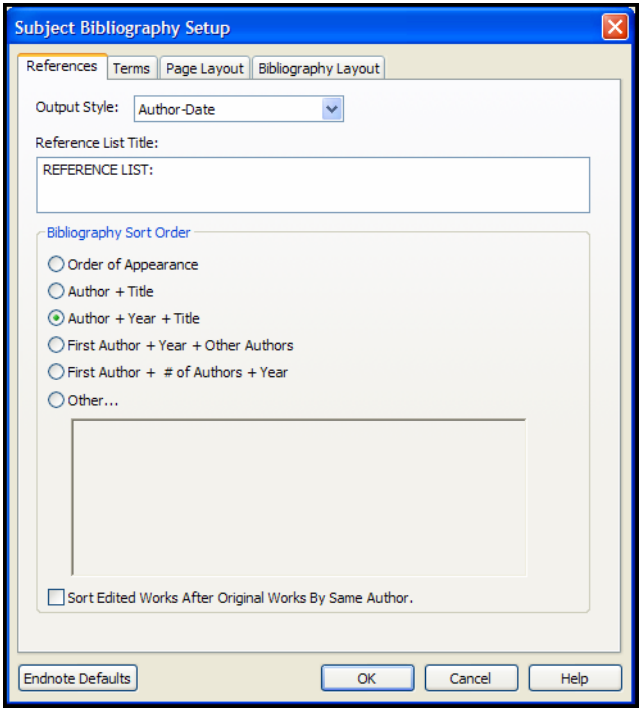
Subject Bibliography Settings

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.

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 section 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 2,800 output styles. Use the *Find by* button to narrow the list of output styles by discipline. Then, select a style in the list and click *Choose*.

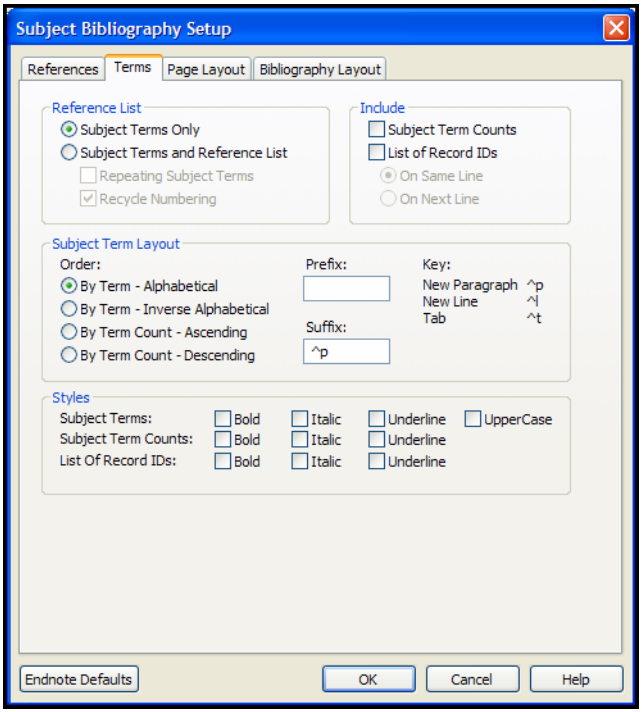
The output style is used to format the references in a subject bibliography. This setting is ignored for a subject list.

Reference List Title: Type a title in the text box to print at the top of your subject list or subject bibliography.

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 section describes the Terms tab 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**

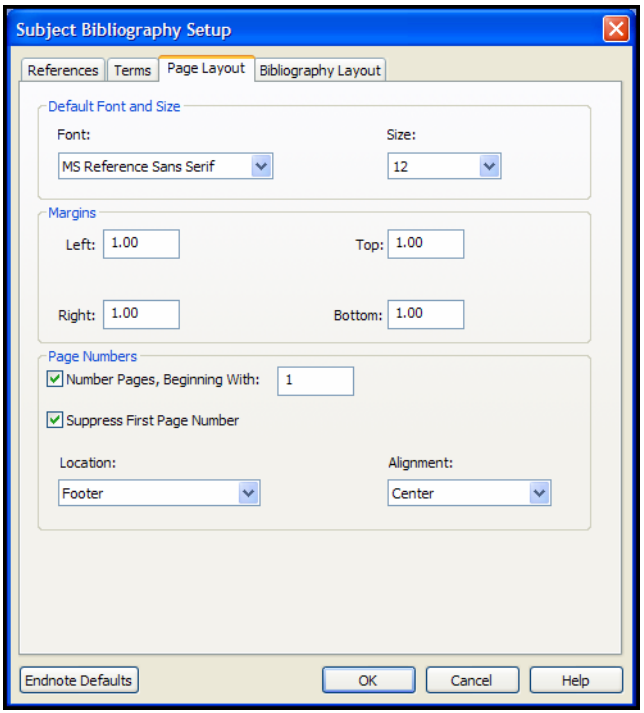
1. Quilty, P.G., *Cycleryon glaessner (crustacea, decapoda) from the jurassic of Ellsworth Land, Antarctica*. Journal of Paleontology, 2000. 62(4): p. 619.
2. Whitney, J.R., T.V. Billoski, and V.R. Jones, *Evidence for Triceratops in Antarctica, in New Directions in Paleontology*, T.V. Billoski, Editor. 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 section describes the Page Layout tab available on that dialog.



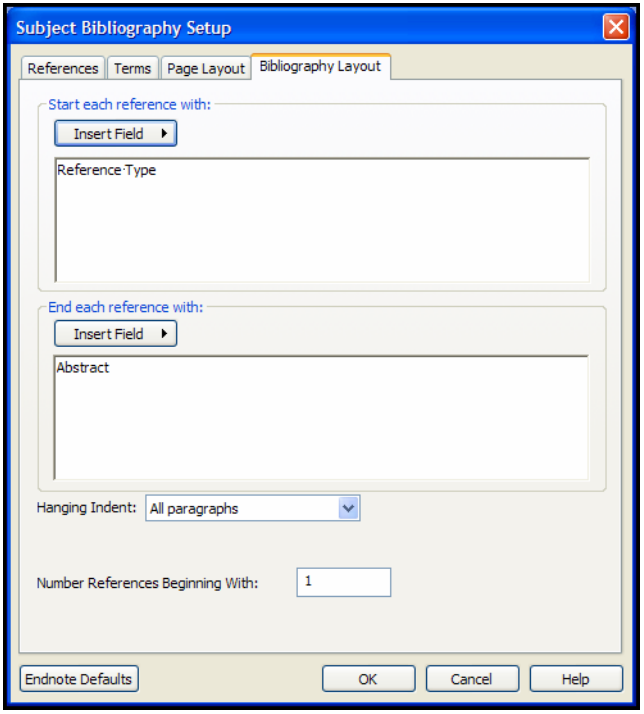
Select the Default Font and Size: Use the drop-down lists to select a default font and size for your subject headings or subject terms. Font and size for bibliographic references are set in the output style.

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 section 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).

NOTE: Whether references are numbered or not is determined by the output style selected.

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.

Chapter 14
Reference Types

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Introduction

What is a Reference Type?

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 38 pre-defined reference types: Ancient Text, Artwork, Audiovisual Material, Bill, Book, Book Section, Case, Chart or Table, Classical Work, Computer Program, Conference Paper, Conference Proceeding, 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, Patent, Personal Communication, Report, Statute, Thesis, Unpublished Work, and Web Page.

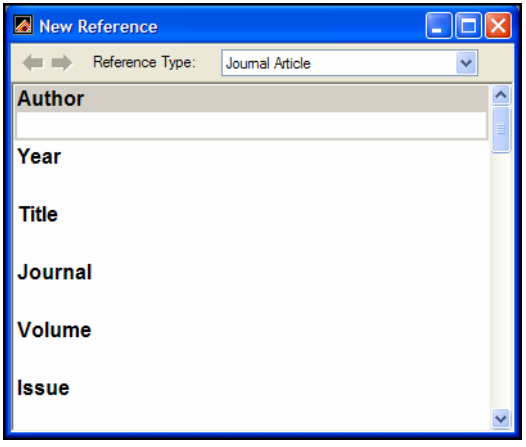
Important Points About Reference Types

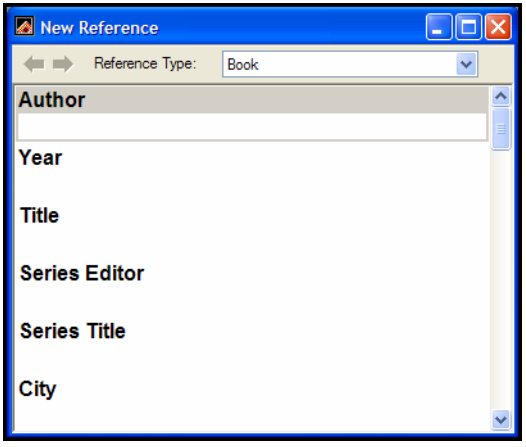
- You can assign a particular reference type to each reference entered into your library.
- The Reference Types preference, accessible through EndNote's Preferences, determines which fields are available for each of the different reference types.
- The Reference Types preference allows up to 42 different types of references, each capable of supporting up to 52 fields (including the name of the reference type).
- Of the 42 reference types, all but the Generic type can be modified.
- Use the Reference Types preference to add, delete, or rename fields. You can also 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" on page 398.

- *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

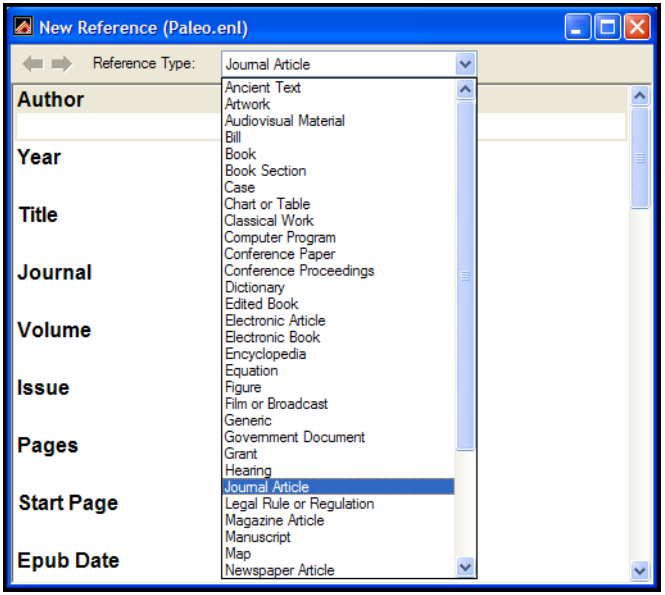
The chosen reference type specifies which fields appear in the Reference window. For instance, an EndNote journal article reference includes the fields "Journal," "Volume," and "Issue," while a book reference includes fields such as "Series Title" and "City." The Reference window displays only the fields 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.

The Reference Type List



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 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 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 52 fields (including the first field, which contains the name of the reference type). Each of the 51 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 along with the Journals term list to modify journal names in formatted bibliographies (see page 258):

- 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 on 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 valid hyperlink. No other fields are checked. See "Linking References to Websites and Files" on page 155.

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 *File Attachments*>*Open File* command on the *References* menu can be used to launch the file. See "Linking References to Websites and Files" on page 155.

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" on page 150 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 the next section.

Use the text field immediately following the Figure field, the Caption field, to enter relevant information pertaining to the figure or file.

Customizing the 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.

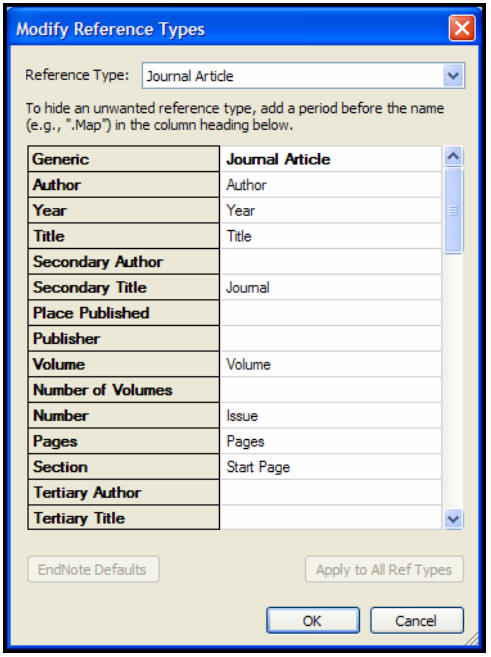
- The Reference Types table applies to all libraries opened on a computer from your user account.
- If your library is opened from a different computer or a different user account, your references will follow the layout of the Reference Types preference for that computer and user, unless you also transfer a copy of your reference type table. See "Sharing Your Reference Type Table" on page 398.
- 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.

About the Reference Types Preference

You can change 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, go to the *Edit* menu, choose *Preferences*, select the *Reference Type* option in the list of preferences, and click *Modify Reference Types*.

NOTE: The *Modify Reference Types* command is enabled only when all Style, Filter, Connection, and Reference windows are closed.



The first column is reserved for the **Generic** reference type, which lists all of the available fields. Use the drop-down list at the top of the dialog to display one of the 42 reference types in the right-hand column.

The rows correspond to the 52 possible fields that each reference type can contain. 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. As described earlier, the Generic reference type serves as a model for constructing all other reference types. See"The Generic Reference Type" on page 389 and "Special Fields" on page 389 for more information.

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.

To navigate 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, 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 the previous section about "Special Fields" on page 389 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.

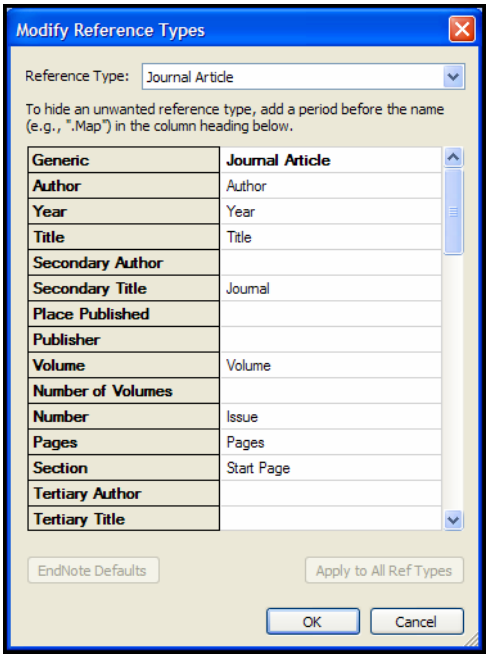
NOTE: The *Modify Reference Types* command is enabled only when all Style, Filter, Connection, and Reference windows are closed.

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* 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* 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* 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.

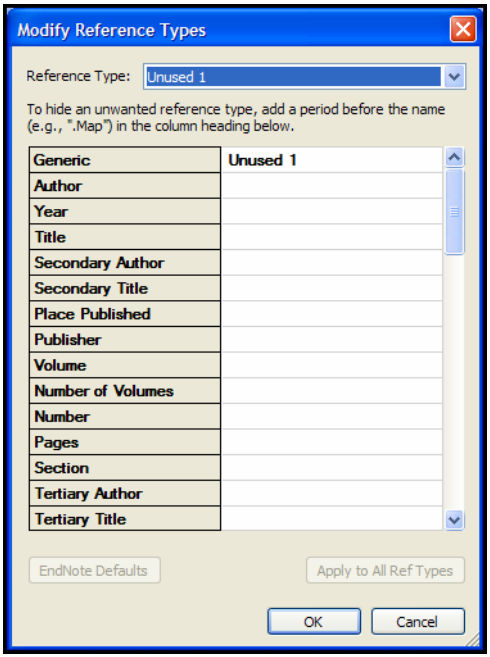
Adding and Deleting Reference Types

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* 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* to save your changes.

Sharing Your Reference Type Table

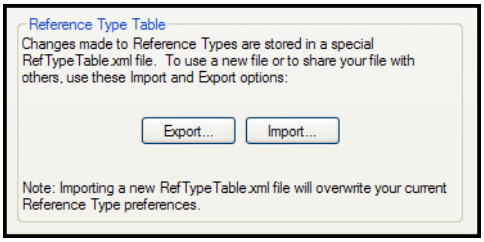
An EndNote user can share a customized reference type table with another EndNote user. Keep in mind, however, that when you do this, you completely replace the recipient's existing reference type table.

NOTE: Replacing another user's reference type table overwrites all changes to his/her current 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:

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

The table presented in Appendix C, "Reference Types and Fields" on page 619 shows the default fields used in each of the different reference types and what the fields are called.

Chapter 15
Bibliographic Styles

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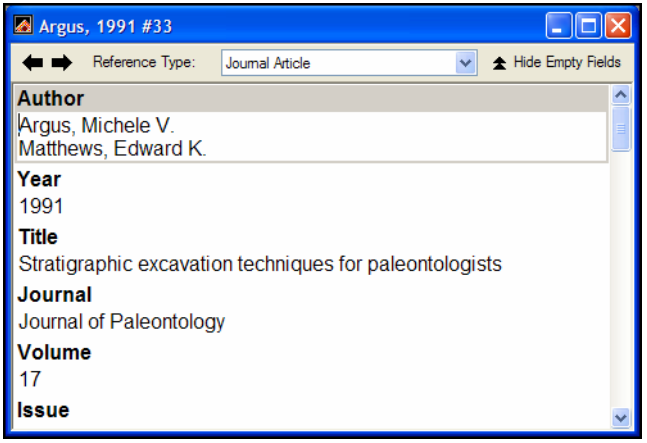
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Introduction

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, this 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).

The Output Styles Menu

The style selected in the *Output Styles* submenu of the *Edit* menu (or the style menu on the Main 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.

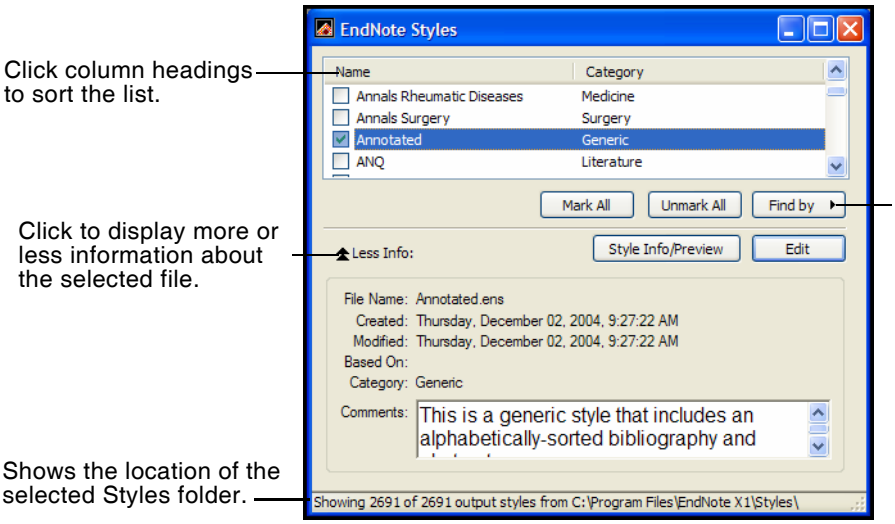
The Style Manager

EndNote includes more than 2,800 individual bibliographic styles. Each one of these styles is stored as an individual file in the Styles folder in your EndNote folder.

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 or consult the EndNote Help file. 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 all of the styles available in the Styles folder and gives you the options to edit them or select them as "favorites" for quick access from the style menu on the Main 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.

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 of the Main toolbar. This gives you easy access to the styles you use most often.

Use the *Mark All* button as a quick way to select a whole category of styles. For example, click the *Find* button and choose a category from the available list. EndNote displays only the styles in that category. Click *Mark All* to mark all of them as favorites and they will appear in your *Output Styles* menu. Choose *Show All* from the *Edit* menu 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.

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.
- Click the *Find* button and choose a category (such as Medicine or Humanities) to find only the bibliographic styles for a specific discipline. EndNote will display all matching results.
- Click the *Find* 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.

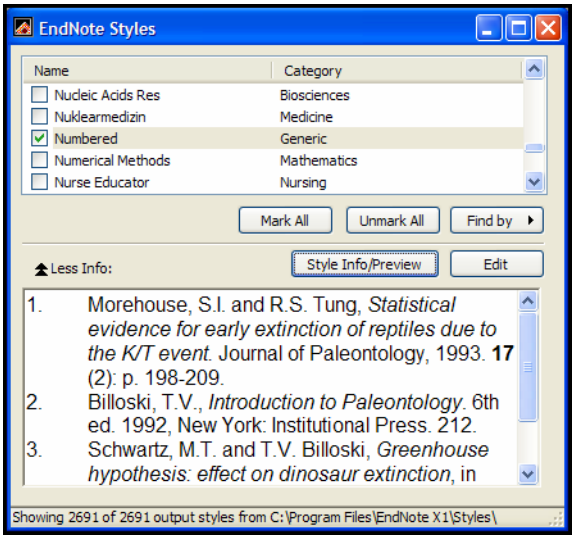
Previewing Styles and Showing Information

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 *Show Preview* button at the bottom of the Library window.
4. Select any reference in your library to have it displayed in the Library window's preview panel.

The preview pane 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

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 use this method to make backup copies of your styles after you modify them (see Appendix A).

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 in your Styles folder if you would like access to it from within EndNote. If you save the style outside of the Styles folder (such as on a CD to take a copy to a different computer, or to backup the file), it will not be available within EndNote.

NOTE: You must have write access in order to modify files in the default Styles folder found at C:\Program Files\Endnote X1\Styles. Otherwise, see "Cannot save a style, filter, or connection file" on page 608.

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* from the *File* menu. Alternatively, choose *Save As* from the *File* menu when you want to save a modified style with a new name.

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 designated style folder. (The Style Manager within EndNote only provides access to the styles that are in the designated styles folder). Your Styles folder, by default, is the folder called "Styles" in your EndNote folder. You may also specify a different folder if necessary. For instructions see "Folder Locations" on page 534.

EndNote styles use the file name extension of ".ENS" (for EndNote Style), as in "Nature.ens."

NOTE: You must have write access in order to modify files in the default Styles folder found at C:\Program Files\Endnote X1\Styles. Otherwise, see "Cannot save a style, filter, or connection file" on page 608.

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.

You can also delete an unwanted style by switching back to the Windows desktop, and opening the Styles 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.

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.

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 2,800 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 design a style of your own or modify 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 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 "Basic Components of a Style" and "Modifying Style Templates" starting on page 411.

Once the new copy of the style has been saved, it will be added to your style menus.

NOTE: You can download the latest output styles available from Thomson ResearchSoft. Visit the EndNote website (http://www.endnote.com) for available styles.

Accessing Styles in Other Places

The *Style Manager* displays only the styles in the chosen styles folder. Only styles from one folder can be displayed in the *Styles* menu at any given time; styles in subfolders within the selected folder are ignored.

By default, the Style Manager displays the styles that are in the "Styles" folder in the EndNote folder. You may copy files into this folder to have them displayed in the Style Manager, or you may change this to use a different folder, if necessary. To do so, choose *Preferences* from the *Edit* menu, select the *Folder Locations* panel, and click the *Select Folder* button in the Styles section of that panel. See "Folder Locations" on page 534 for details.

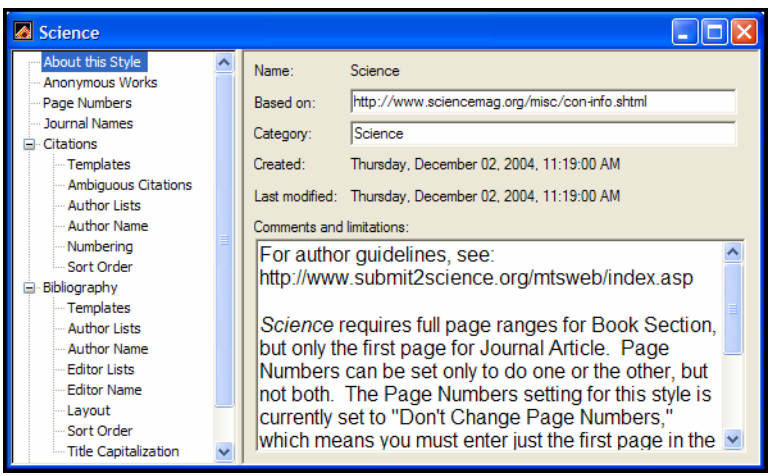
Basic Components of a Style

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, also read "Creating a New Style" on page 455.
- 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 page 413.

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. These options are described starting on page 429.

Modifying Style Templates

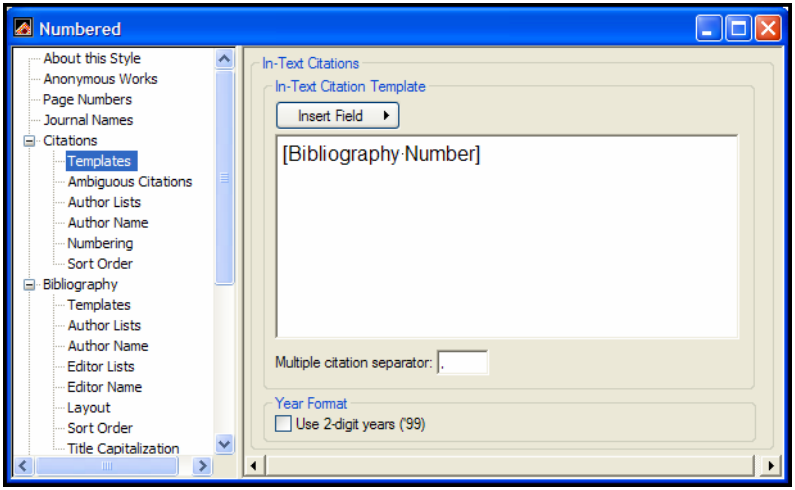
If you are creating a bibliography that requires a style not included with EndNote, then you can modify a style to suit your needs. (See "What Should I Do if My Style Is Not Included?" on page 410.) Editing a style requires a general understanding of how styles work and the components of a style. Read "Basic Components of a Style" on page 411 to become familiar with the terms used in this section.

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. More

information about editing templates is provided later in this section.



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.

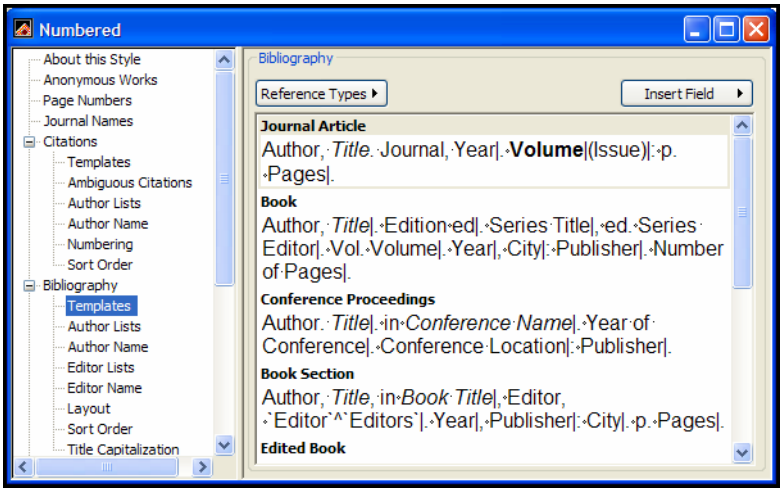
The separator can be changed by typing other text in the "Multiple citation separator" box. Remember to include a space in the separator section when necessary.

Year Format

If you would like EndNote to use 2-digit years (such as '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.

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

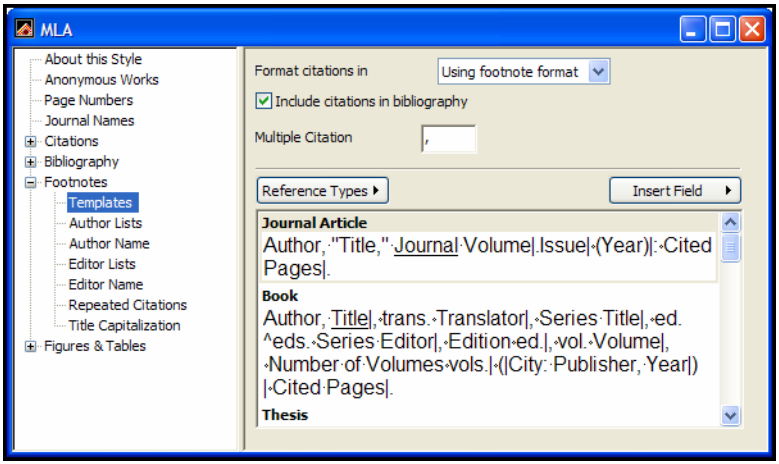
The Generic template is used to format references that use the Generic reference type or do not have their own template in the style. For example, if a Book template had not been included in the style, book references would be formatted using the Generic template.

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)" on page 450.

Changing the Punctuation in a Formatted Reference

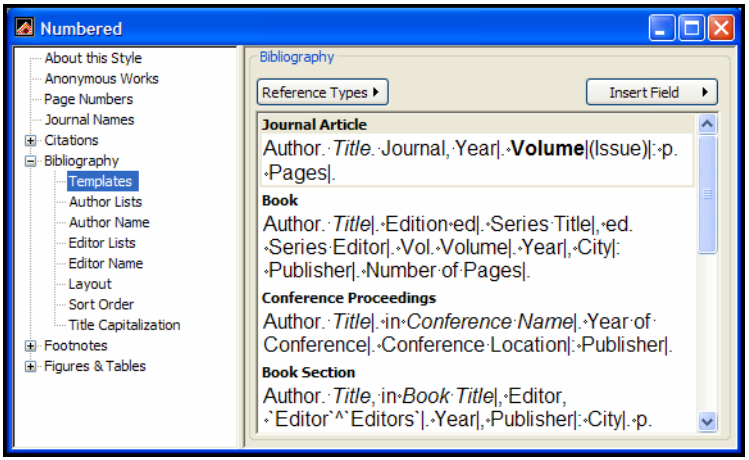
Punctuation that appears in your formatted references can be changed by editing the style you are using. When you edit a style, you can delete unwanted punctuation, replace it with other punctuation, or add additional punctuation where necessary.

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*.

   Or, if you prefer to just update the original Numbered style, choose *Save* instead of *Save As*.

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" on page 425. That section 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 see "Accessing Styles in Other Places" on page 411 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.

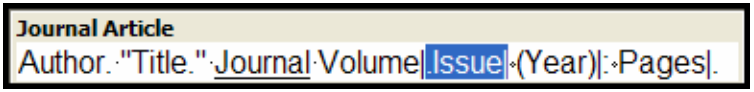
NOTE: As a short-cut, you can use the options in the *Layout* panel to add text or punctuation before or after *every* reference in a bibliography. See "Adding Text Before Each Reference" on page 443 and "Adding Text After Each Reference" on page 444.

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 (which includes "`.Issue|`" in this example), 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" on page 425 for more information about the vertical bar.)

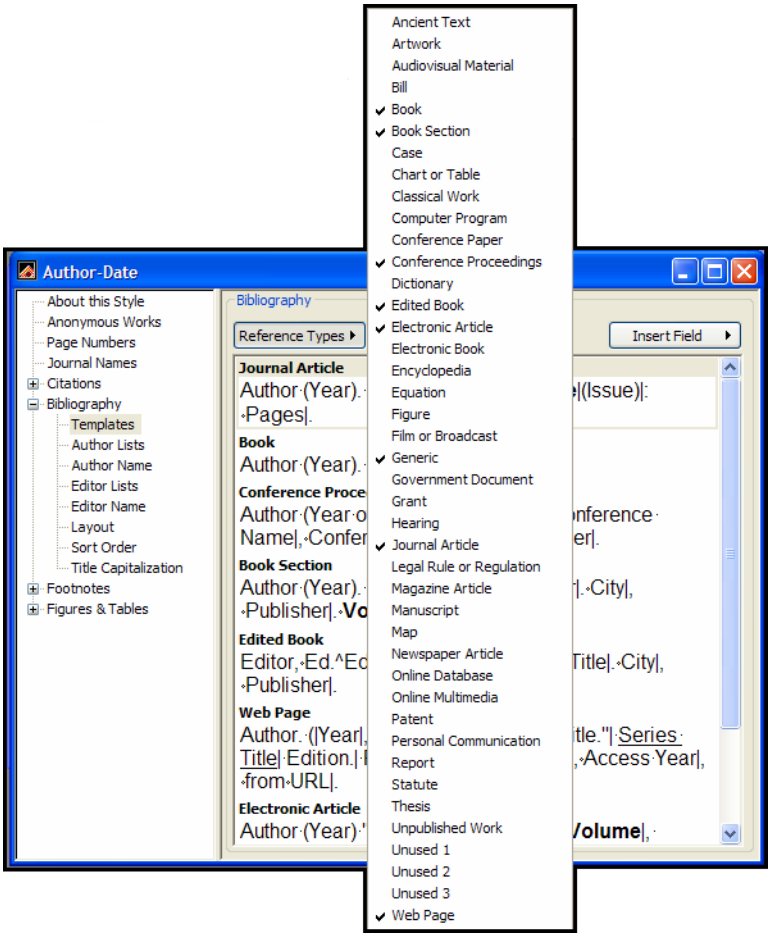
Adding New Reference Types

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 names.)



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).

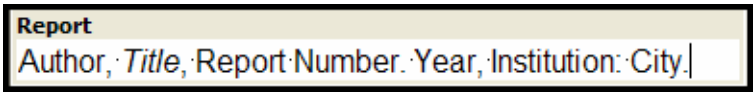
Defining the Format for the New Reference Type Template

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* commands in the *Edit* menu.

The final template for the Report reference type looks like this:



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 Courier font, EndNote uses that font for the paper's bibliography.

EndNote's *Edit* menu commands let you apply any font, size, or text style to your Style templates.(Note that only the standard Windows fonts are available in EndNote's *Edit* menu.)

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 described in the next section.

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 discussed later.

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 "Link Adjacent Text (Using the Non-breaking Space)" below.

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 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 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)

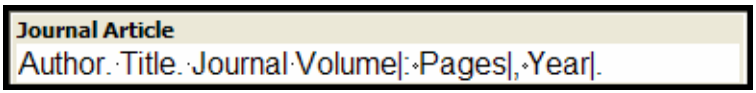
If you type `Edition ed.` into a style template and use an ordinary space to separate the field name "Edition" from the abbreviation "ed.", then "ed." will appear regardless of whether or not the reference has an edition (see Rule #4).

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. Look at the example below to understand the correct locations for a non-breaking space.



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 next section) to change the dependency of a punctuation mark from one field to another.

```
Volume|:•Issue|.
```

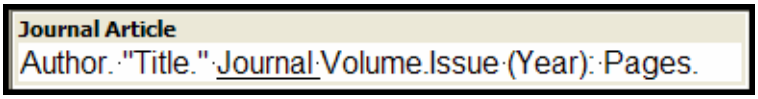
In this case, the colon (:) is linked to the Issue field with a non-breaking space, so it does not print in the bibliography if the Issue field is empty.

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:



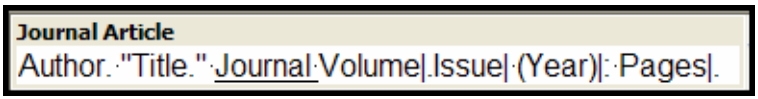
However, when this style formats a journal article that does not include an issue number, the bibliography entry will be incorrect, as in the following example:

```
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:



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)

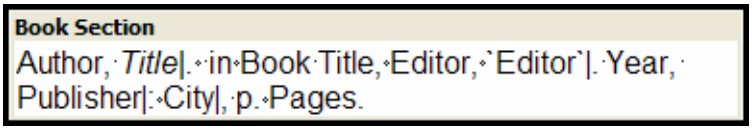
Field Names in Bibliographies

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.

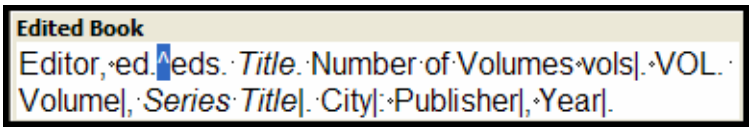


Singular/Plural Term Separator (Caret ^)

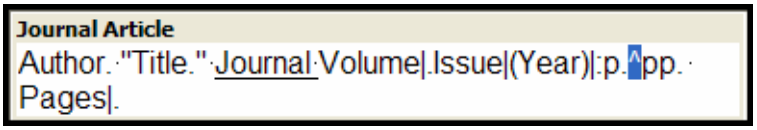
You can specify both singular and plural forms of labels for editors or pages in a formatted reference by using a caret (^) to separate the terms. For example, some styles put "Ed." after a single editor and "Eds." follows several editors' names. Or, similarly, "p." might precede a single page, while "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:



Or like this:

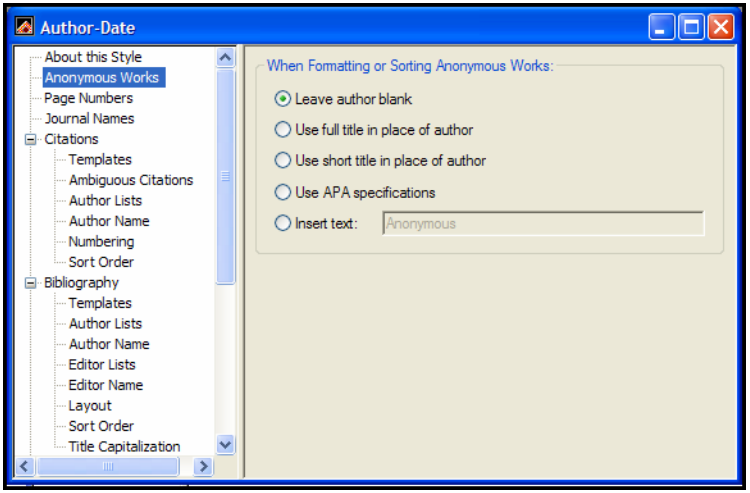


Additional Style Formatting Options

The 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 style.

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: The section "Special Formatting Characters" on page 425 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 journal abbreviation lists for several 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 page 250) 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 "Working with the Journals Term List" on page 258.

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

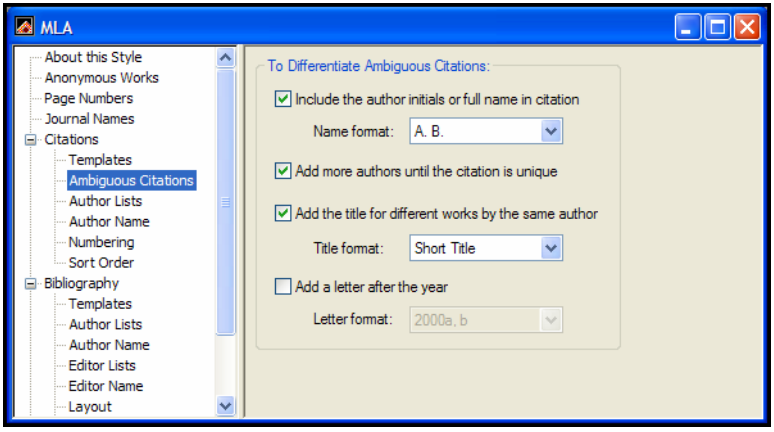
defaults to *Don't Replace*, and EndNote uses the journal name exactly as it appears in the original reference.

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.

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)
```

- **Add 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 (see page 413). 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}

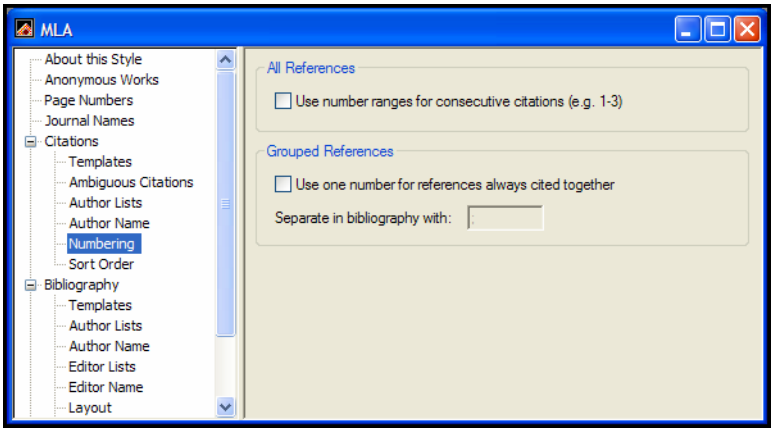
- **Use number ranges for consecutive citations**
  When this option is checked, consecutive bibliography numbers appearing in a multiple citation are joined by a single dash, for example:

  …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.



Citation Author Lists

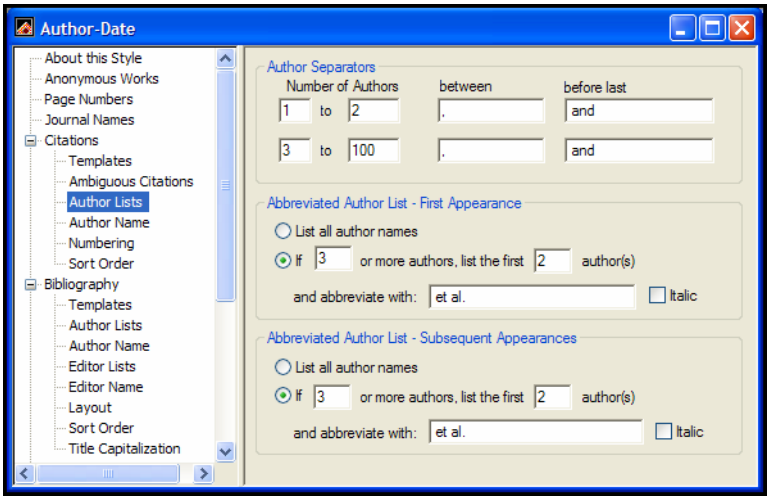
If the style you are using lists the author names in the Citation template of the Style window, you can use the *Author List* options (as well as the *Author Names* panel) to control how the authors appear in your in-text citations. If your citations do not include the author names, ignore the *Author 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 to print between author names. 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" text

when there are only two authors; and enter “, and ” when there are 3 or more authors (as shown in the example below).



NOTE: Include spaces after commas as well as before and after the word “and”. The spaces are not visible in this dialog.

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 allow 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.

The example shown above abbreviates author lists of three or more names to show only the first two authors followed by “ et al.”

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" on page 528.

- **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:

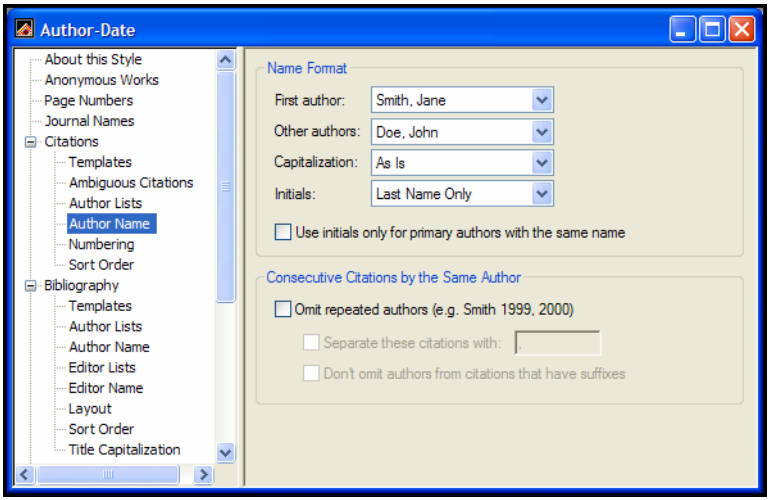
```
(Smith, 1993, 1999; Wyatt, 2000)
```

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 that have 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 List (Bibliography and Footnotes)

The *Author List* 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 List* 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.

The "Separators Between Author Names" section and the "Abbreviated Author List" section on these panels are identical to those provided for the *Author List* panel under the *Citations* heading. See "" on page 435 for details about these settings.

You can also determine formatting 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.

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 on page 438. This section describes the options that are available for both the footnote and bibliography *Author Names* panel.

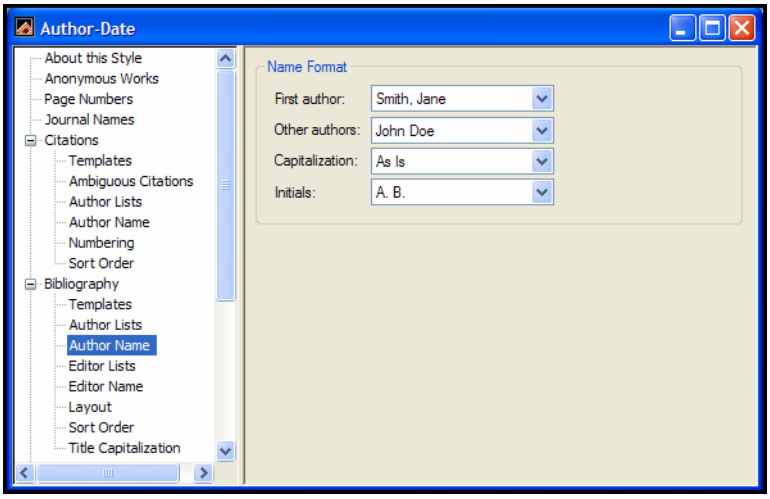
These settings are for choosing how author names should look—for example, whether the first or last name should come first, whether there should be a comma after the last name, and how the names should be capitalized.

- **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 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" on page 528.
- **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.



Editor List and Editor Names

To specify how the editors' names are to be formatted, select *Editor List* or *Editor Names* 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 (see page 440). Similarly, the Name Format options in the *Editor Names* panel are the same as those for *Author Names* described on page 441.

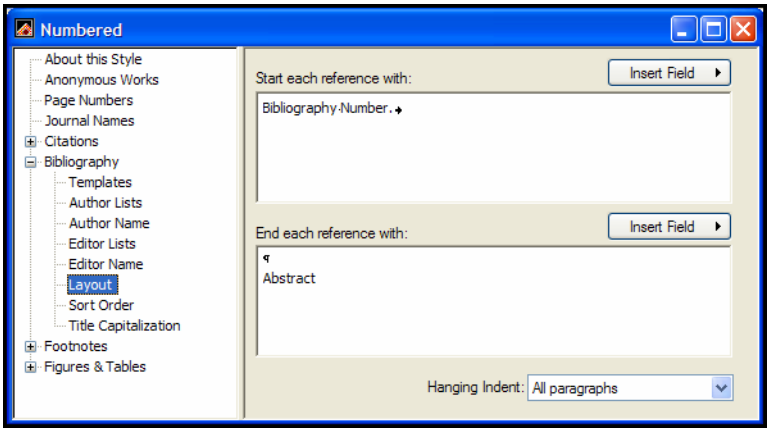
"Editors" Are Considered Primary Authors for Edited Book Reference Types

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.

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 "Citation Prefix Marker" on page 525.)

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 page 445.

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" on page 295.)

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 wouldn't 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:

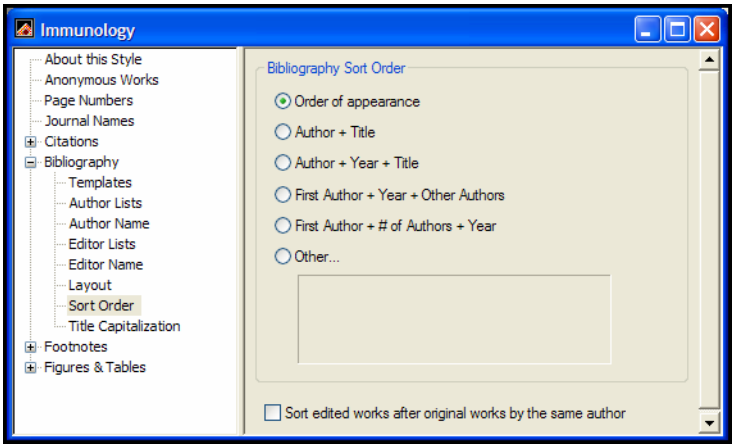
```
(Zoler 1983; Lee 1990; Jacob 1994)
```

Options for sorting multiple citations include:

- **Same as Bibliography**
  Sorts multiple citations in the same order as the Bibliography Sort Order (see page 448).
- **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" on page 449.

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.



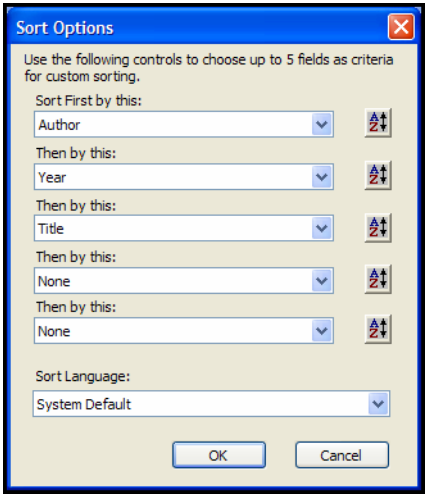
- **Order of Appearance**
  References are listed in the order in which they are cited in the paper.
- **Author + Title**
  References are sorted by the Author field. References with identical authors are sorted by title.
- **Author + Year + Title**
  References are sorted by the Author field, then references 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" below.
- **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, read "Sorting" on page 526.

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.

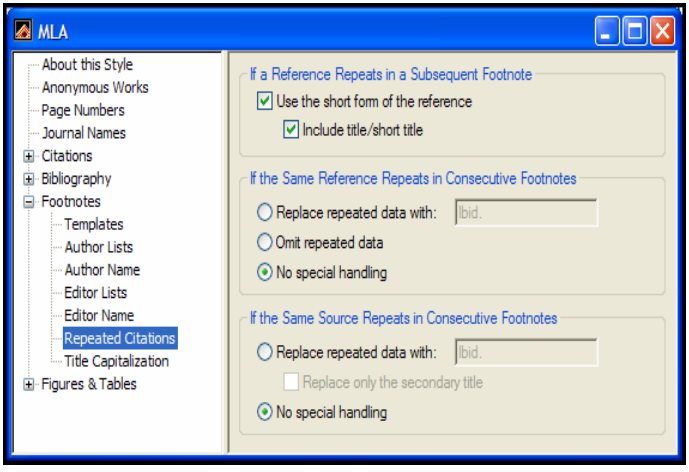
Options for title capitalization include:

- **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" on page 528 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 is 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.



When a reference repeats, use short form

One common setting for citing references in footnotes is to list a shortened form of a reference after the first time it is cited in a

footnote. So, for example, the first time the reference is cited, the full references appear (as specified in the *Templates* panel). The second time that reference appears in a footnote, only a shortened form of it (the Author name, and cited pages if there are any) is listed. Check the option to "Include Title/Short Title" if you would like both the author and the title to appear in the shortened form of the footnote references. The contents of the Short Title field will be used, if available; otherwise, the regular title will be added to the citation. The format of the title (such as italic, underlined, or in quotations) is determined by the format of the title in the footnote *Templates* panel.

Here is an example of the first occurrence of a citation in a footnote, a consecutive citation to the same reference, and a third instance of that source being cited, but the volume and cited pages are different:

```
1 George Harding, California Wildlife, 2 vols.
(New York: Nature Press, 1989), 1: 207.
```

[This is the first, and therefore complete, reference to the work].

```
2 Ibid.
```

[With no intervening reference, a second reference to the same volume and page of Harding's work requires only Ibid.]

```
3 Ibid., Vol. 2, p.51.
```

[Here another volume and page number of the reference are used.]

Special Handling of Consecutive Footnotes

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). The next option allows you to simply omit the repeated data, and replace it with nothing. Or you may 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

The Figures and Tables settings apply to images inserted into a Word document from EndNote. You can place figures 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.

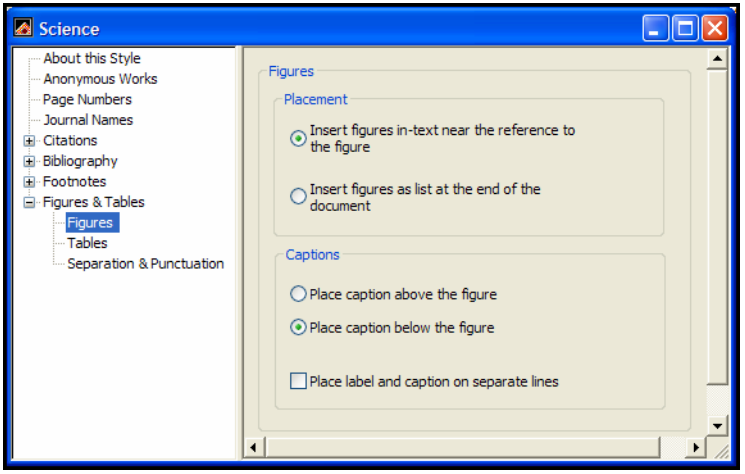
While style guidelines tend to be very specific in regard to formatted citations and bibliographies, they are often vague about figure and table placement. They may require different placement for different document types (theses, term papers, journal articles, etc.), or they may not offer instructions 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" on page 545.

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 or 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" on page 545.

Captions

Next, under Captions, 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 or Table reference type. The Caption is the text typed into the Caption field of a reference.

Separation and Punctuation

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.

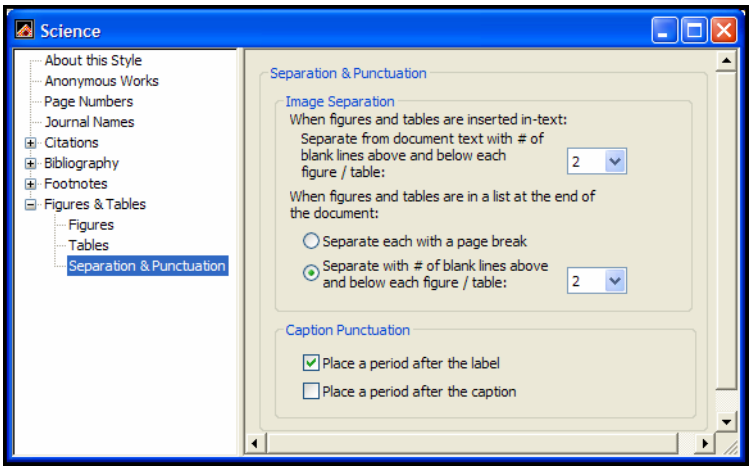


Image Separation

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

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" on page 413.) If you do wish to create a new style, this section 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. The following example guides you through the creation of a fictitious author-date type of style.

Example: Creating an Author Date Style

Part I: Creating the Templates

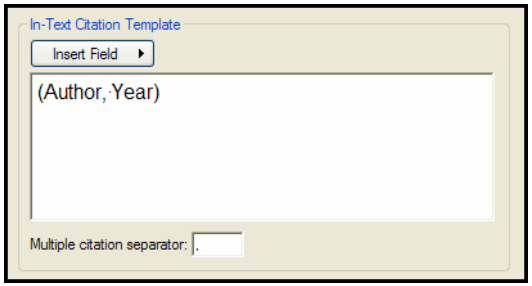
A new style need only contain a Citation template and a Generic Bibliography template for it to produce citations and bibliographies for any paper. The Citation template applies to all in-text citations, and the Generic bibliography template applies to all reference types that do not have templates of 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:

   ```
   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* 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" on page 413 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 the "Additional Style Formatting Options" section starting on page 429.

Chapter 16

Filters

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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.

This chapter describes how to edit and create these import filters. The process of importing references using the *Import* command is described in Chapter 7.

NOTE: You can download the latest filters available from Thomson ResearchSoft. Visit our website at http://www.endnote.com.

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.

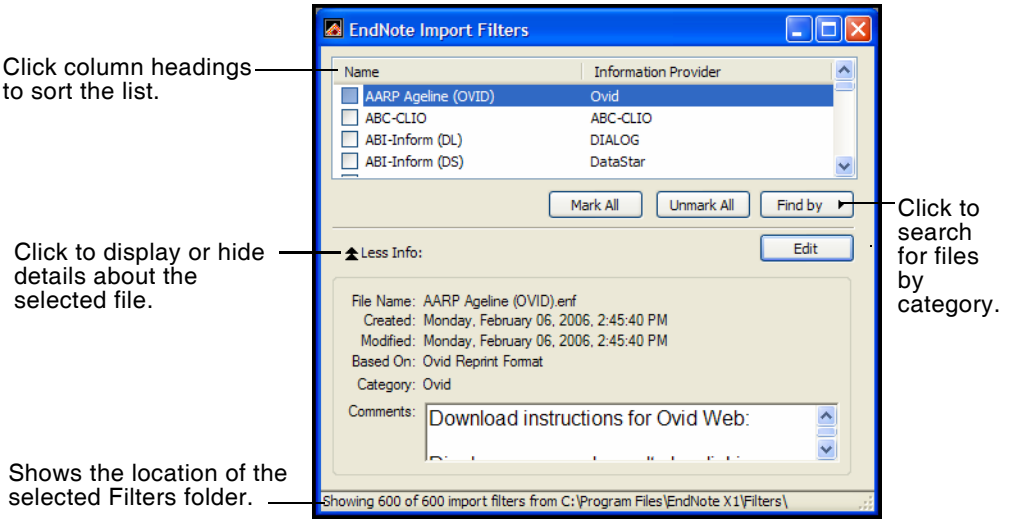
Because each database offered by the various information providers has its own way to organize reference data, there needs to be a different filter for each database. Each filter provided with EndNote has been configured to import data files from a specific database offered by a single information provider. 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. To peruse the list of available filters in EndNote's Filters folder, choose *Import Filters* from the *Edit* menu, and select *Open Filter Manager*.



The **Filter Manager** lists the names of all of the import filters available in the 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.
- 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.
- Click the *Find* 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* 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 *Find by* 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.* The remainder of this chapter goes into detail about how to work with the filters. Read the section that applies to the aspects of the filter that you would like to modify.

Copying Filters

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 the 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 in your Filters folder if you would like access to it from within EndNote. If you save the filter outside of the Filter folder (such as on a CD to take a copy to a different computer, or to backup the file), it will not be available within EndNote.

NOTE: You must have write access in order to modify files in the default Filters folder found at C:\Program Files\Endnote X1\Filters.Otherwise, see “Cannot save a style, filter, or connection file” on page 608.

After clicking *Save* to save the new copy of the filter, the new filter remains open. The original filter will be left untouched.

Saving Filters

To save a new or modified filter, choose *Save* from the *File* menu. Or, to save changes to a filter that you have just opened or modified while leaving the original filter unchanged, choose *Save As* from the *File* menu (see "Copying Filters" on page 463).

When saving a new filter, or saving a filter under a different name, EndNote automatically saves the filter to your designated filter folder. (The Filter Manager within EndNote only provides access to the filters that are in the designated filter folder). Your Filter folder by default is the folder called Filters in your EndNote folder. You may also specify a different folder if necessary. For instructions see "Folder Locations" on page 534.

EndNote filters use the file name extension of ".ENF" (for EndNote Filter), as in "Medline.enf.

NOTE: You must have write access in order to modify files in the default Filters folder found at C:\Program Files\Endnote X1\Filters.Otherwise, see "Cannot save a style, filter, or connection file" on page 608.

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.

You can also delete an unwanted filter by switching back to the Windows desktop, and opening the Filter 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.

The Basic Components of a Filter

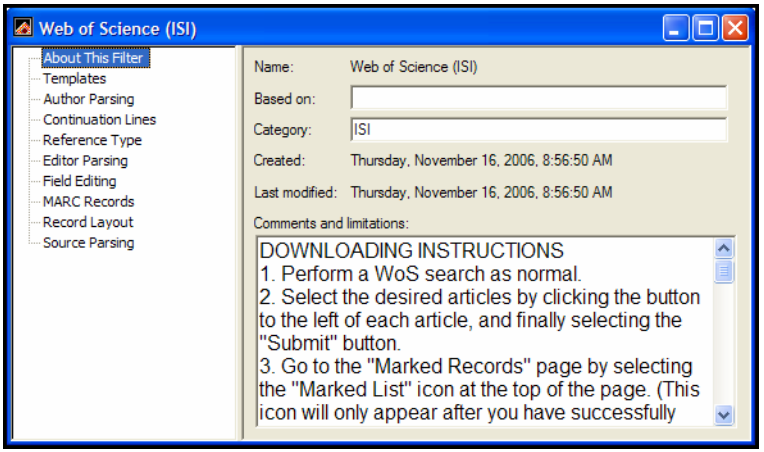
The basic components of an import filter are described in this section. This information is useful if you want to customize or create a filter.

- **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" on page 494.
- **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>*.

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 (see the picture in the preceding section). 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.

Templates

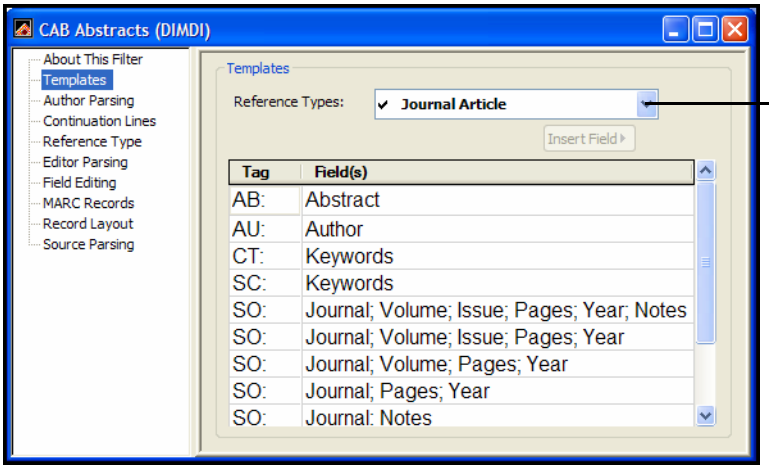
The most important part of the filter is the *Templates* section. The templates define how the various lines of tagged data in your data file should be imported and filtered into the different EndNote fields (such as Author, Year, and Title). Different sets of templates are required for the different reference types that may be in your data file. All of the details about filter templates are covered in "Working with Filter Templates" on page 467.

Options

The rest of the options in the Filter window involve refining the data that is imported using the filter templates. For example, these options include instructions for how EndNote should interpret author names and initials, change the capitalization of fields, or even omit certain characters or terms that you do not want to be imported. Each of the various options is explained in its own section. See "The Filter Options" on page 475.

Working with Filter Templates

The *Templates* panel consists of individual Reference Type templates which correspond to the way the reference data is presented in the data file.



Click here to change the view to a different reference type template.

This example shows a template for Journal Articles.

Navigating in the Templates Panel

The *Templates* panel 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.

To move from one cell to the next, simply 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 Type list to change the view to a different reference type (such as from Journal Article to Book).

Templates for Different Reference Types

The *Templates* panel includes templates for all of the various reference types (Journal Article, Book, etc.).

- Click the Reference Type 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

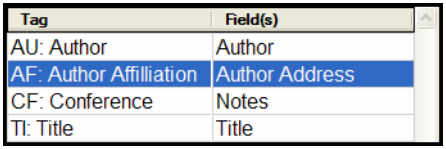
When adding and deleting rows, the order of the tags does not have to match the order of the tags in the data file. There is one case in which the order of the tags is important: if you are entering multiple variations of one tagged line, you should enter the repeated lines for that tag in order from 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 it and select *Clear* from the *Edit* menu.

Cutting, Copying and Pasting Rows

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 holding down the SHIFT key and clicking on a field. (Press SHIFT and click vertically across more than one row to select 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 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

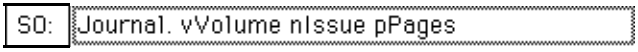
When you look at a filter, you will notice that some of the templates contain information other than EndNote field names. For EndNote to identify which data should go into a particular EndNote field, you must include punctuation and any literal text or spaces that appear in your data file. Punctuation 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.

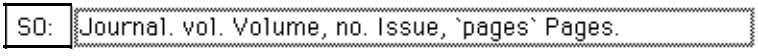
As a result, the above SO: tag line should be represented in a filter like this:



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:



The {IGNORE} Field

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:



The Source Line

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

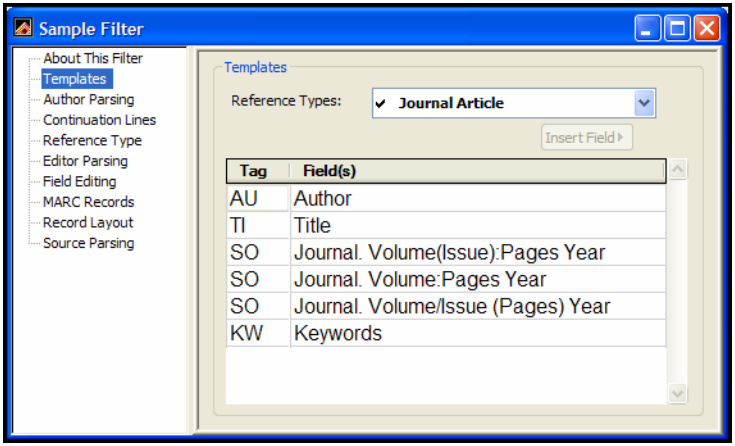
SO: Semin-Oncol. 127:5-24 1999

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:



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" on page 487.

The Reference Type Tag

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 Ther; 47 (11) p998-100
CP- UNITED STATES|
PY- Nov 1993|
SN- 0272-9490|
JC- 304|
CN- MCJ-009105|
LA- ENGLISH|
DT- Analytic; Serial|
JA- 9404|
SF- INDEX MEDICUS|
```

Reference Type Tag

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":



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:



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 page 481).

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 also "Author Parsing" on page 475.

Year
Only 4-digit numbers (1### or 200#) are imported.

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.

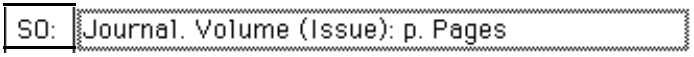
Issue
An "N", "No" or "No." before the number is automatically removed (this is not case sensitive).

When Punctuation Repeats Within a Field

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:



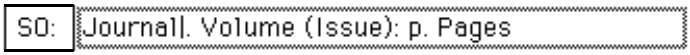
Another source line in the same data file might look like this:

```
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:



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 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.

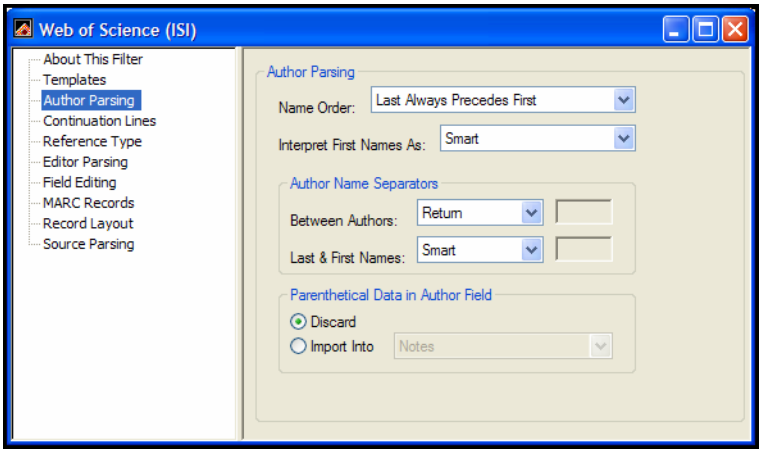
EndNote's "Smart" Settings

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.

Author Parsing

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:



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:



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:  Buning ME; Hanzlik JR
```

EndNote's *Smart* parsing recognizes the semicolon separating the two author names and correctly imports them into an EndNote library as:



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 (page 476).

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

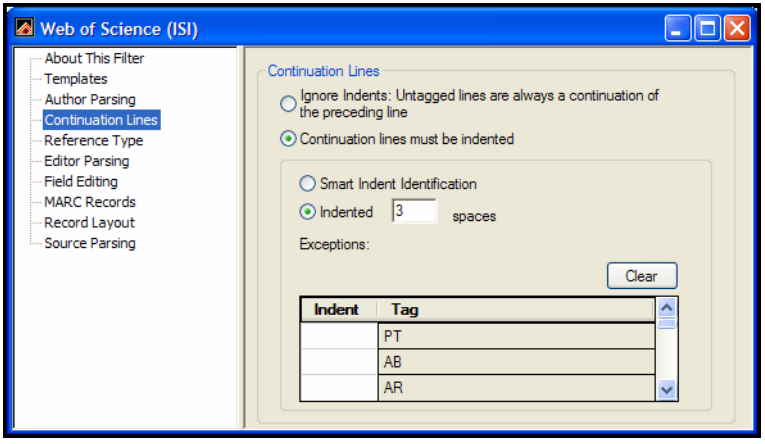
In general, EndNote ignores lines of text which do not begin with a tag *unless* the lines of text are continuations of a previous tagged item. We call these continuation lines. Here is an abstract from a data file illustrating the concept of continuation lines (all but the first are considered continuation 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 page 471).

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

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 page 472 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.

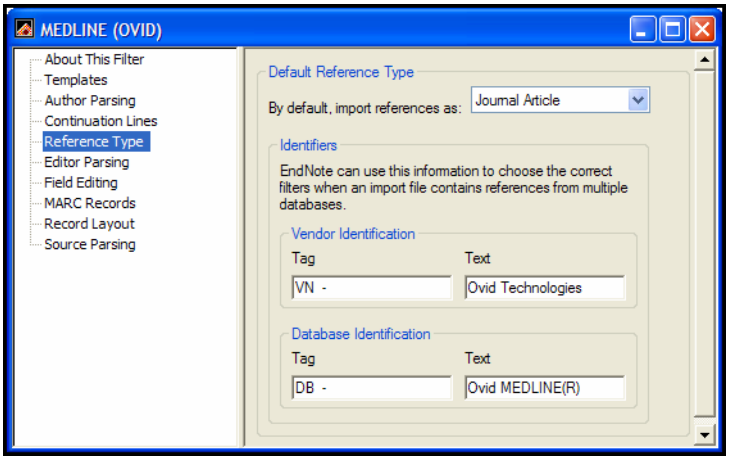
Identifiers

Some information providers, such as Ovid Technologies, Inc., provide a button on their website 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 website 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.



EndNote would know to use the filter shown above if the data file that it was trying to import contained those two tags and lines of text:

```
<1>
VN      Ovid Technologies, Inc.
DB      Ovid MEDLINE(R)
AU      Jacobson, R; Campbell, S.
PY      1999
etc.
```

Field Editing

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 "Table of Predefined Reference Types" on page 399.) 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
```

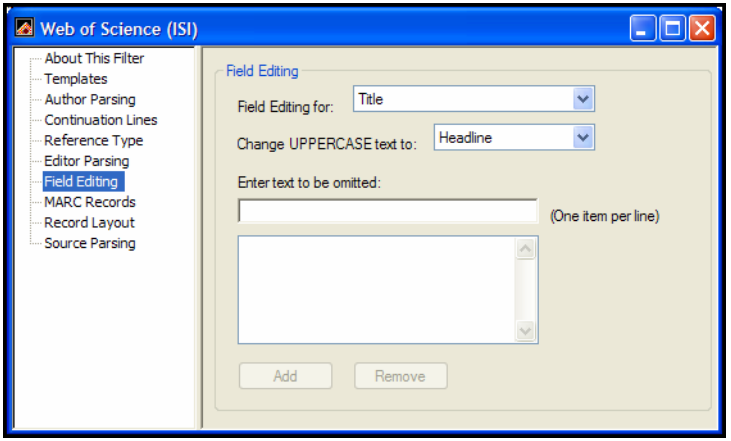
or in *Sentence* capitalization as:

```
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. From the "Field Editing for:" list, select the EndNote field that contains unwanted characters. You will find that the EndNote fields are listed by their Generic names. For a list of reference type fields and their corresponding Generic field names, see "Table of Predefined Reference Types" on page 399.
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.

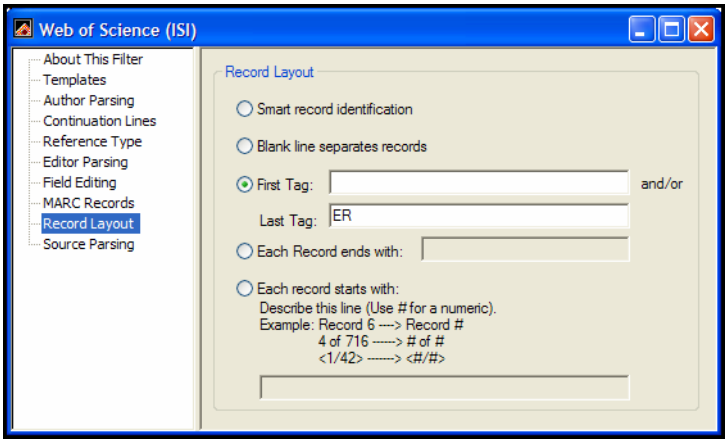
Each item that you want to omit should be entered on a separate line. For example, let's say that you wanted to omit both underscores (_) and forward slashes (/) from your records' keywords. First add the underscore, and then add the forward slash. Entering both items on the same line would cause EndNote 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

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 not 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

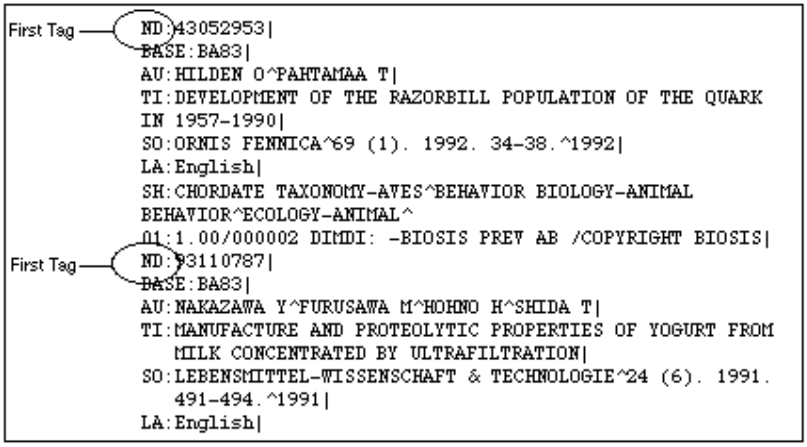
```
Record 1 of 53
```

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 type "ND:" in the box.



Source Parsing

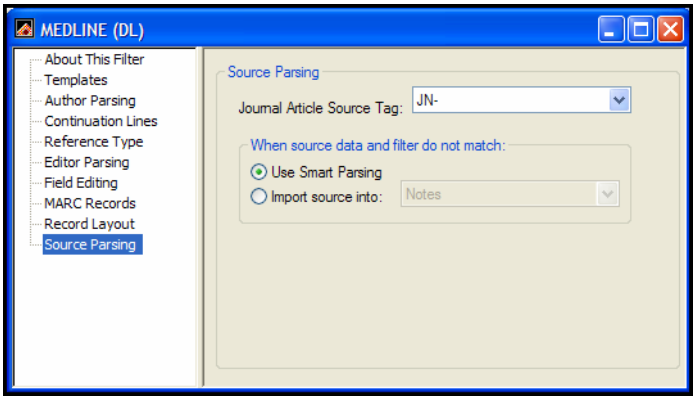
The **source line** refers to the line in the data file that represents the source information for the journal (typically journal, volume, issue, pages, and sometimes the year). It is most often the most complex and inconsistent line of data in your data file—and it is also the most important. As a result, 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.

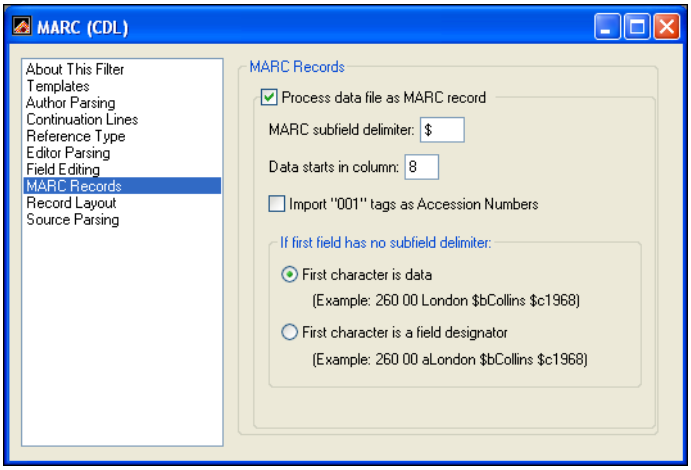
If you were creating a conventional filter for importing bibliographic records from a MARC database, you would have

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

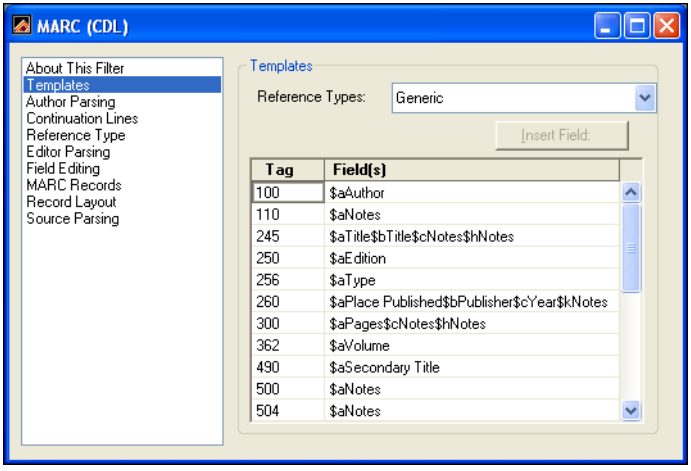
the EndNote database.) The provider may not call it an Accession Number; PubMed uses PMID, and some systems use "unique identifier." These numbers sometimes appear immediately after the numeric tag, and without the two-digit subfield codes seen in other MARC fields. Since a common type of accession number 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

The *Templates* panel for a filter created for MARC records looks something like this:



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.

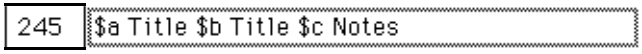
```
245 10  $a When you realize you have too many
        kids: $b a guide / $c Hugh B Dunn.

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:




```
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.
```

Example: Modifying an Existing Filter

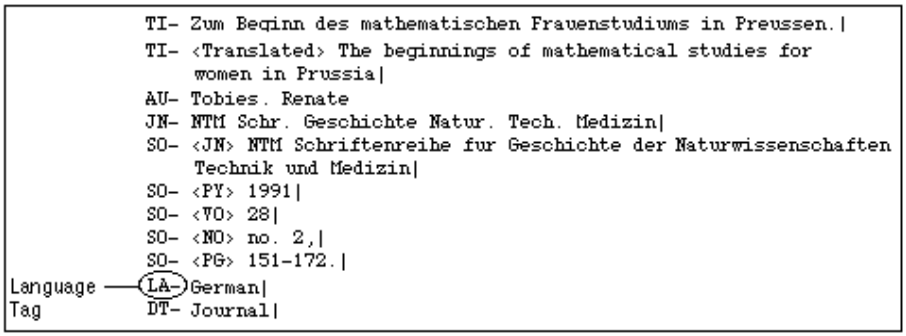
Modifying an existing filter is useful if you want to create a new filter for a different database by the same provider. Although some information providers offer radically different formats for their different databases, there are others who provide fairly consistent tags and organized data across their 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

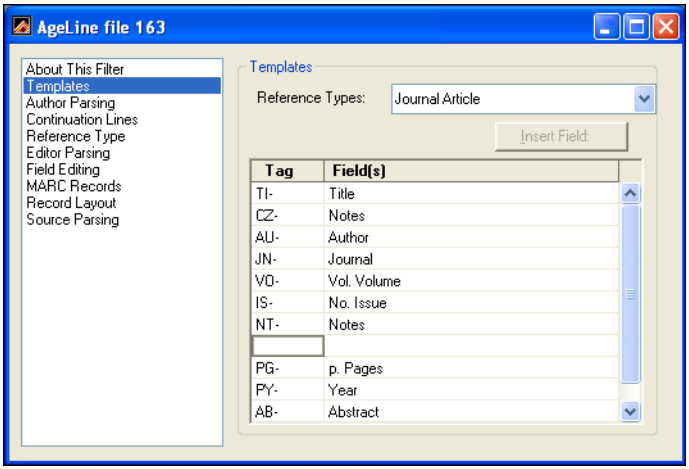
Let's say that you want to modify a filter to import the language of the publication into EndNote's Notes field. In this particular database, the language is preceded by the tag "LA-".



To add the LA tag and direct its contents to the Notes field:

1. From the *Edit* menu, choose *Import Filters* and select *Open Filter Manager*. (The most recently used filter also appears as an option in the *Import Filters* submenu. You may choose *Edit <filter name>* to directly edit that filter as well.)
2. In the Filter Manager, select the filter that you want to edit and click *Edit*.
3. Select the Templates option in the left pane of the window.

4. Click the mouse in any cell of the Journal Article template, and press ENTER to create to a new row.



5. 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.
6. 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.
7. To keep the original filter unmodified, choose *Save As* from the *File* menu, give the modified version of the filter a new name, and click *Save*. Or, to save the changes to the original filter, simply choose *Save* from the *File* menu.

Creating a New Filter

This section provides a general overview of how to create a new filter. It includes an example of a data file, and the templates portion of a filter to match it. Specific instructions for configuring templates and filter options can be found in the earlier sections in this chapter.

Overview

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" on page 467.)
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" on page 475).

NOTE: If you need a reference type that does not appear in the *Reference Type* list, see"Adding and Deleting Reference Types" on page 396.

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" on page 487).

MARC formats are an exception. See page 491.

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" on page 467 for details about configuring templates.

Sample Record from a Data File

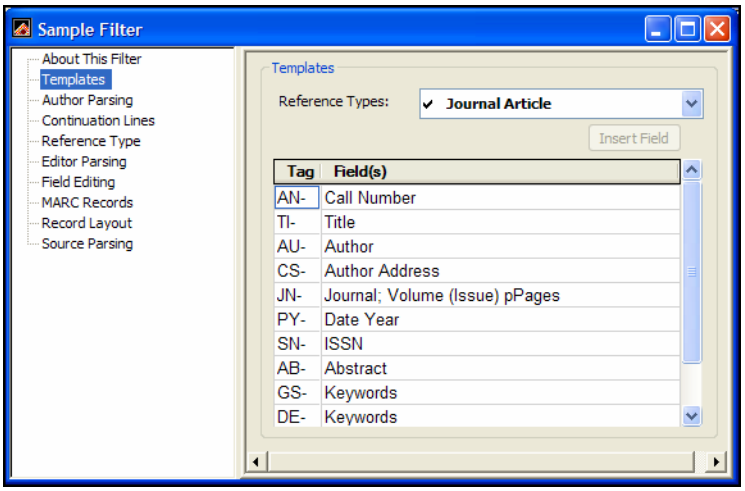
```
FN- DIALOG MEDLINE file 155
AN- 08791562|
AN- <NLM> 94106562|
TI- Adaptive computer use for the visually
    impaired
AU- Buning ME; Hanzlik JR|
CS- School of Occupational and Educational
    Studies, Fort Collins, Colorado.|
JN- Am J Occup Ther; 47 (11) p998-1008|
CP- UNITED STATES|
PY- Nov 1993|
SN- 0272-9490|
JC- 3O4|
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.g., 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. Type `TI-` in the tag cell, then press TAB to move to the Field column. Insert the Title field using the *Insert Field* button.
2. Press ENTER to move to the next line.
3. 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.

Here's what the resulting *Templates* panel of the filter looks like:



NOTE: It is important to remember that the source line in a filter (in this case the JN field) 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, as outlined in "Source Parsing" on page 487.

Chapter 17
Connection Files

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Introduction to Connection Files

The *Online Search* command in 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 chapter describes how to edit and create these connection files. The process of using the *Online Search* command is described in Chapter 6.

NOTE: You can download the latest connection files available from Thomson ResearchSoft. Visit our website at http://www.endnote.com.

What is a Connection File?

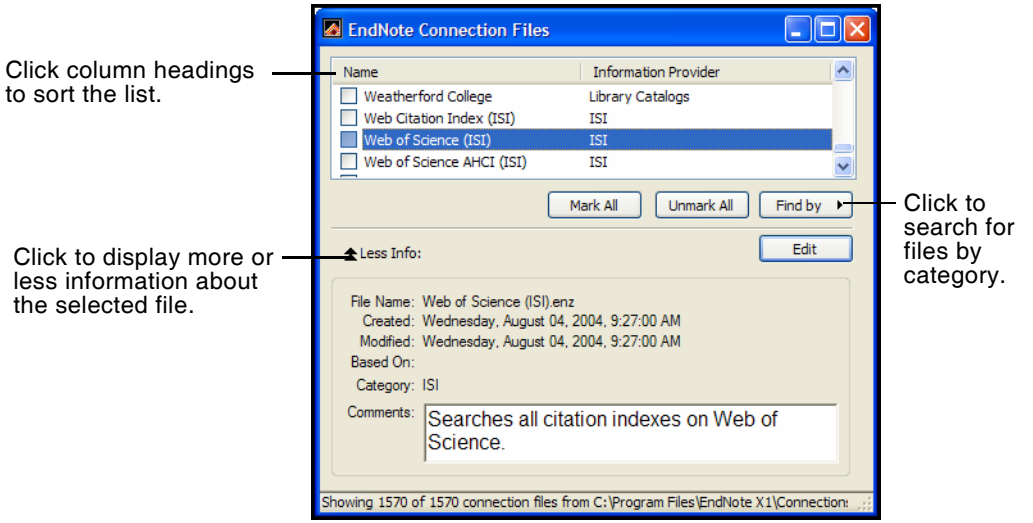
A connection file contains all the information necessary to connect to, search, and import references from an online database or online library catalog. Each connection file represents a different online database (such as the Library of Congress or PubMed from the National Library of Medicine).

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. 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 connection files available in the 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.

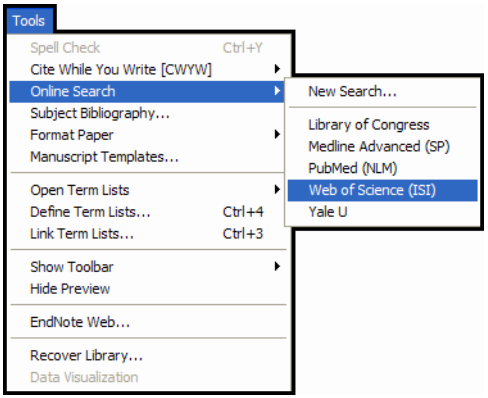
Use these features to locate the connection file you want to use:

- 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.
- 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.
- Click the *Find* 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* 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 to the left of it to mark it as a favorite. All connection files that are marked as favorites appear in a submenu when you choose *Online Search* from the *Tools* menu. 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* 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.* The remainder of this chapter goes into detail about how to work with connection files.

Copying Connection Files

There are two ways to copy connection files. 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.

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 in your Connections folder if you would like access to it from within EndNote. If you save the connection file outside of the Connections folder (such as on a CD to take a copy to a different computer, or to backup the file), it will not be available within EndNote.

NOTE: You must have write access in order to modify files in the default Connections folder found at C:\Program Files\Endnote X1\Connections. Otherwise, see "Cannot save a style, filter, or connection file" on page 608.

After clicking *Save* to save the new copy of the file, the new connection file will remain open. The original connection file will be left untouched.

Saving Connection Files

To save a new or modified connection file, choose *Save* from the *File* menu when the Connection File window is open. Or, to save changes to a connection file while leaving the original connection file unchanged, choose *Save As* from the *File* menu (see "Copying Connection Files" on page 502).

When saving a new connection file, or saving a connection file under a different name, EndNote will automatically save the connection file to your designated Connections folder. (The Connections Manager within EndNote only provides access to the connection files that are in the designated connections folder.) Your Connections folder by default is the folder called Connections in your EndNote folder. You may also specify a different folder if necessary. For instructions see "Folder Locations" on page 534.

EndNote connection files use the file name extension of ".ENZ", as in "Medline (Ovid).enz".

NOTE: You must have write access in order to modify files in the default Connections folder found at C:\Program Files\Endnote X1\Connections. Otherwise, see "Cannot save a style, filter, or connection file" on page 608.

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.

Basic Components of a Connection File

The basic components of a connection file are described in this section. This information is useful if you want to modify or create a connection file. To create a new connection file see "Creating Connection Files" on page 512.

Editing a Connection File

If you are editing a connection file and would like to keep the original file unchanged, choose *Save As* from the *File* menu immediately after opening the connection file for editing. Name the new copy of the connection file and save it in the Connections folder. Your original connection file will remain untouched, and keep its original name. The newly named copy of that connection file will now be open for you to modify as you wish.

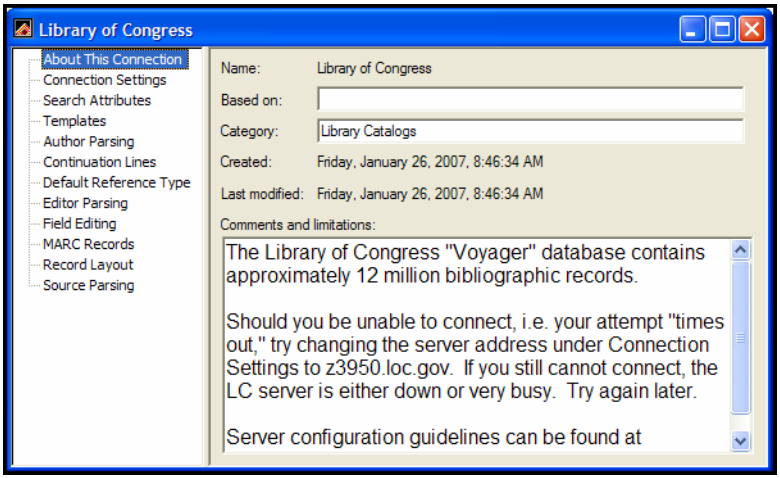
To edit a connection file:

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>.*

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 (shown in the preceding section). 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 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.

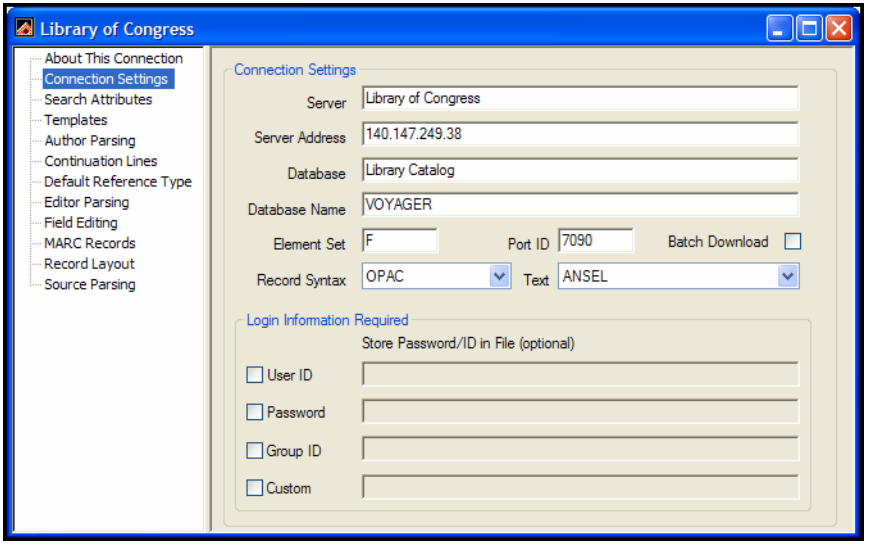
Comments and Limitations: Enter any useful comments here that would help you remember how to search the online database. Limitations to preconfigured connection files may be documented here as well.

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:

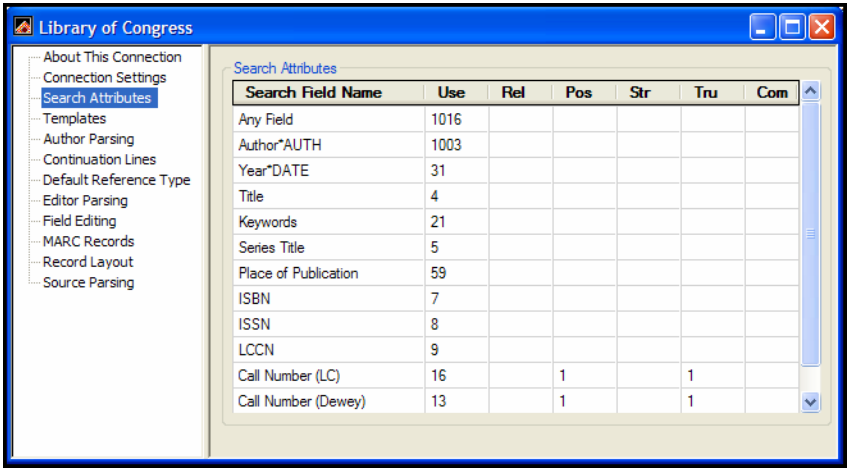
```
pass=?PASSWORD/dla_ui=yes
```

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" on page 182. Generic field names are listed on page 399.)

- **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 ResearchSoft does not provide this information. You will need to obtain it from the organization (or "information provider") that maintains the server.

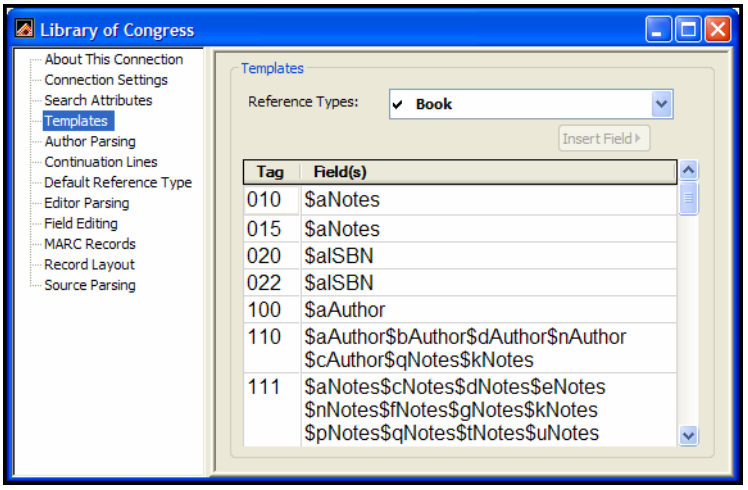
Tip for Editing Search Attributes

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 (see page 514). 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 Filter window. For more information about editing a filter consult Chapter 16.

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, which is located by default in the Windows\Application Data\EndNote folder or the Documents and Settings\"User Name"\Application Data\EndNote folder, depending on your Windows version. 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 "Online Preferences" on page 533.

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.

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. Follow the instructions in Chapter 7 instead to import references that have been downloaded to text files.

Steps to Create a New Connection File

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 (see "The Connection Settings" on page 506).
4. Click on the *Search Attributes* option to modify the default search attributes if necessary (see "Search Attributes" on page 509).
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>New 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 window 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 re-connect 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. See "The Log File" on page 187.

9. If the reference data is not being correctly filtered into the appropriate fields in the EndNote references, you'll need to compare the downloaded data to the filter templates in your connection file.

   Close the Retrieved References window and open the Connect.log file in a word processor to view the original format of the retrieved references. (See "The Log File" on page 187 for information about the Connect.log file.)

   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 Chapter 16 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" on page 511 to import into additional reference types.

Using Z39.50 Command-Line Syntax

NOTE: This section 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 window 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.

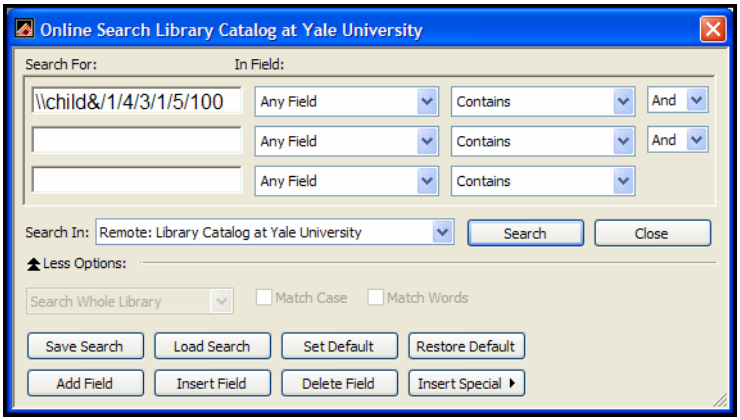
These advanced searches are entered directly into the search line just as you would enter a search term. EndNote ignores the search menu for that item when it detects that you have entered an advanced search. If other search terms are needed, enter them into the subsequent search lines and select the 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" on page 509.)

The following is a common example that should work for most servers. This should find all references in which the title begins with "child."



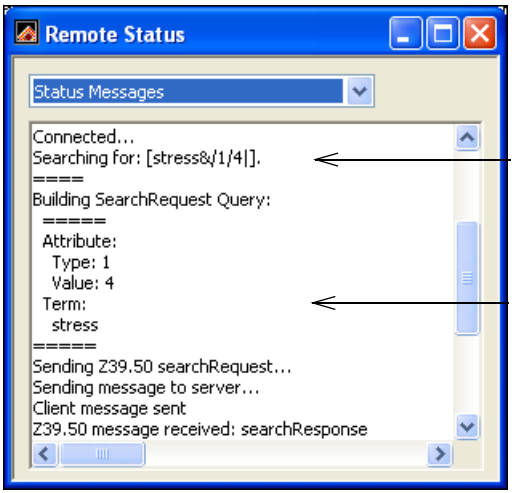
- A Use attribute (1) of 4 has been specified, so the search will be restricted to the Title for this database.
- A Position attribute (3) of 1 further narrows the search by having the search term be found as the first word in the field.
- A Truncation attribute (5) of 100 specifies no truncation at 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. Set the view to *Status Messages*.
2. Start with a basic search using the Search window (without the command-line syntax). For example, search for "stress" in the Title field.

3. Look in the Status window, and you'll see which attributes are being used:



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 into the Search window (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.

Chapter 18

Preferences, Toolbars, and Shortcuts

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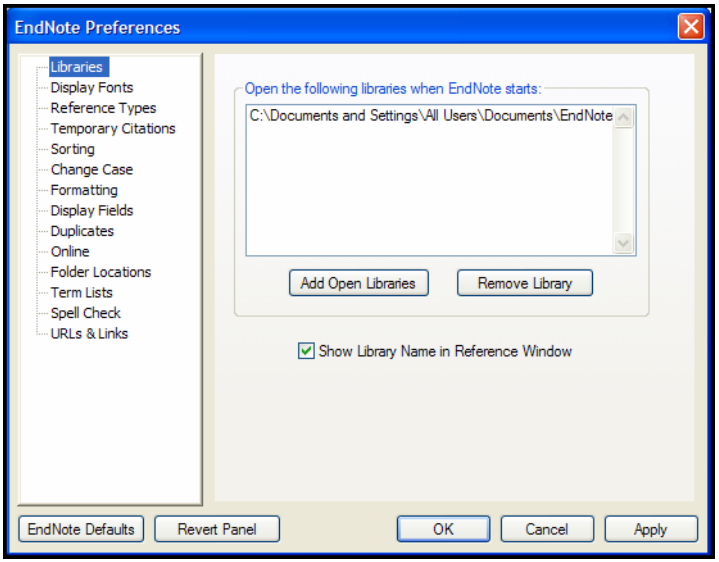
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EndNote Preferences

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.



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.
- *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.

Where Preference Settings are Saved

Preference settings are saved to the current user account, which allows multiple users to access a single library while saving each user's preferred settings.

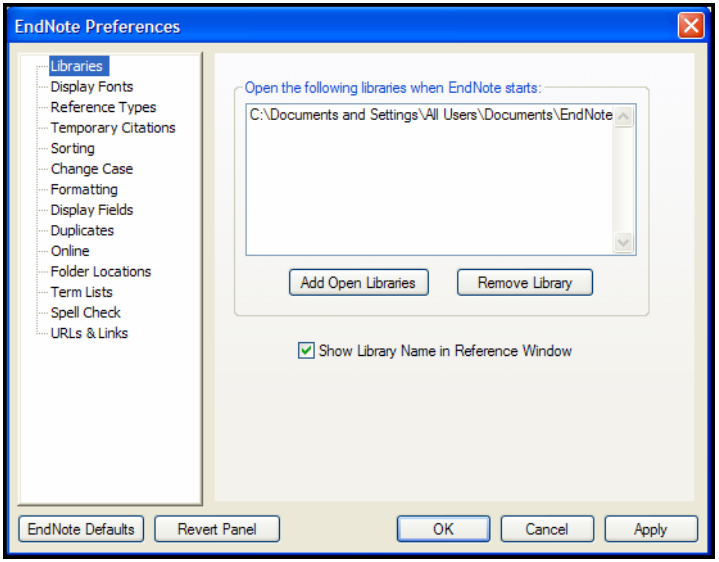
Most general preferences are saved in the Windows registry. For example, this includes EndNote Preferences, subject bibliography settings, and Cite While You Write settings. Storing these preferences on each computer allows multiple users to access a single library while saving each user's preferred settings.

Library Preferences

Setting Default Libraries

Use the Libraries preferences section to specify which libraries should open by default when EndNote starts. To add a library to this list:

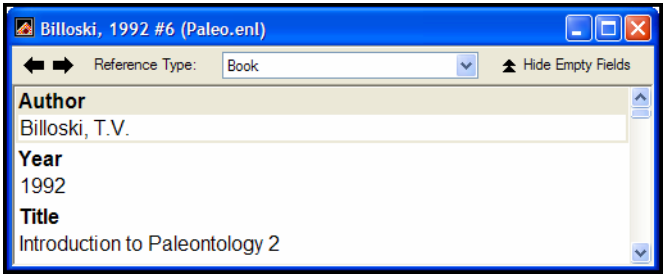
1. If the library is not already open, open it by choosing *Open* from the *File* menu, and selecting the desired library.
2. Return to the Library section of the Preferences dialog, and click the *Add Open Libraries* button to add all open libraries to the list.



To remove a library from this list, select it in the Libraries panel and click *Remove Library.*

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, as shown below.



Display Fonts

The *Display Fonts* panel gives you the option of changing the font that EndNote uses to display much of the text throughout the program. You can control the following display font settings:

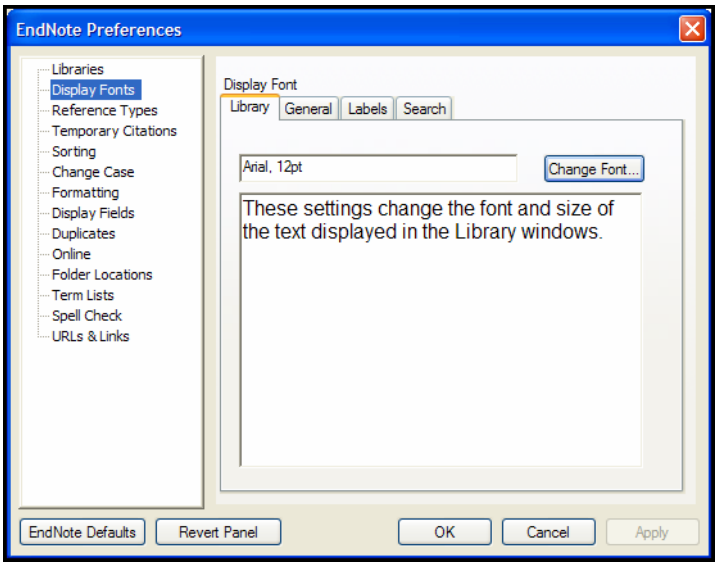
- **Library:** The Library setting determines the font and size of the references listed in the Library window.
- **General:** The General setting changes the font and size used to display most text that is typed into EndNote (such as in the Reference or Style windows). The General Display Font is also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

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" on page 604).

To change the library display fonts:

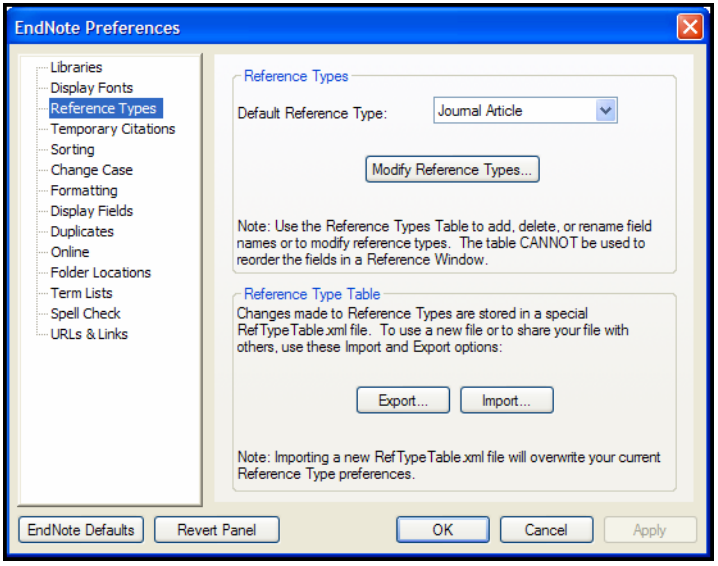
1. From the *Edit* menu, choose *Preferences*.
2. Click the *Display Fonts* option in the list.



3. Click the tab to indicate which display font setting you want to change: *Library*, *General*, *Display*, or *Search*.
4. 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.
5. Click *OK* to save the changes and close the Preferences dialog.

Reference Types

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.



Reference Types

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 new reference type for it and define it yourself (see "Adding and Deleting Reference Types" on page 396).

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 modify, delete, and rename EndNote's reference types and fields.

See Chapter 14 for more information about reference types, how to customize them, and where this information is stored.

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" on page 398 for step-by-step instructions.

NOTE: Replacing another user's reference type table overwrites all changes to his/her current reference types table.

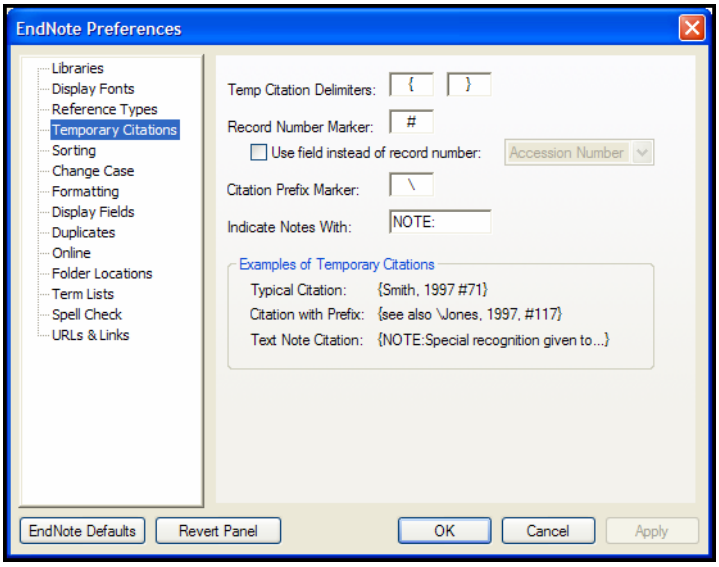
Temporary Citations

A "temporary citation" is an unformatted citation that EndNote inserts into your word processing document when you use the *Find Citation(s)* 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 X1* 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 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

When EndNote sorts author names and titles, you can identify what words or names to ignore for sorting purposes.

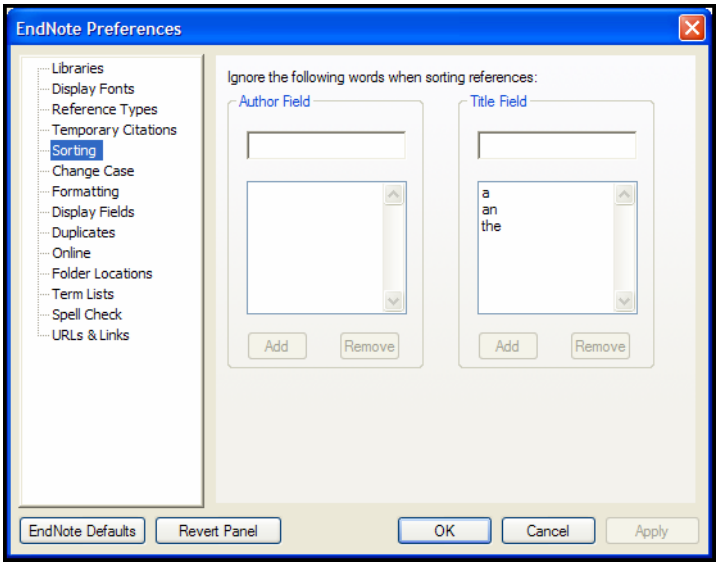
To add words to be ignored for sorting:

- 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, and Subsidiary 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

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.

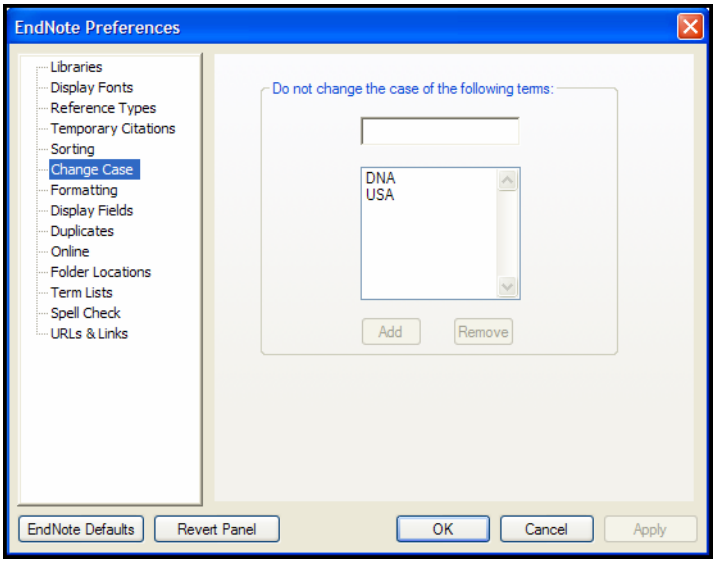
For titles, this preference is used only when an output style is set up to apply "Headline style capitalization" or "Sentence style capitalization" (rather than "Leave titles as entered"). For author names, this preference is used when the output style applies a capitalization option other than "As Is."

To 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

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

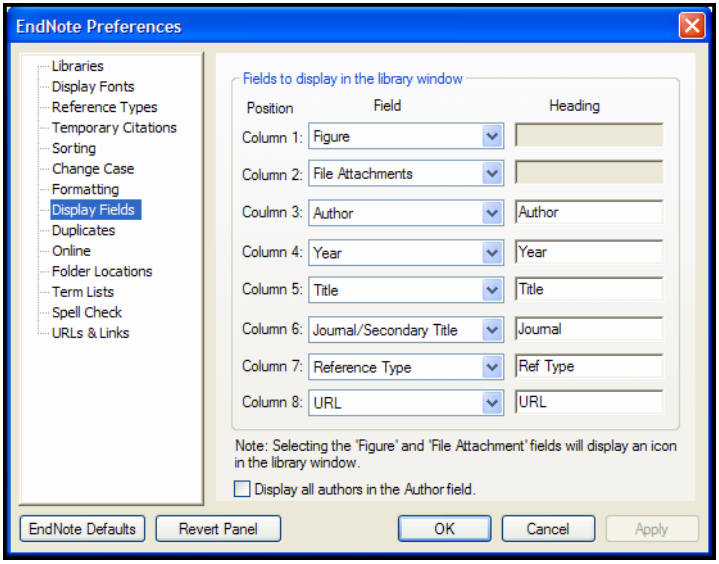
When this option is selected, EndNote automatically omits duplicate references from a bibliography. It is a good idea to use this option if you are citing references from multiple EndNote libraries in one paper. In this situation, the same journal article reference might appear in two libraries and would 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

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.



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. You must choose at least one field for display in order to save your changes.

By default, the column heading in the Library window is the same as the Generic name of the field (except for the *Figure* field, which is indicated by a *fig.* heading, and the *File Attachments* field, which is indicated 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 section next to the chosen field.

Initially, the first column shows a *fig.* heading for references that include an attached graphic or file in the Figure field. The second column displays an 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, and the URL 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

The *Duplicates* preferences panel corresponds to the *Find Duplicates* command in the *References* menu (that command is described on page 230).

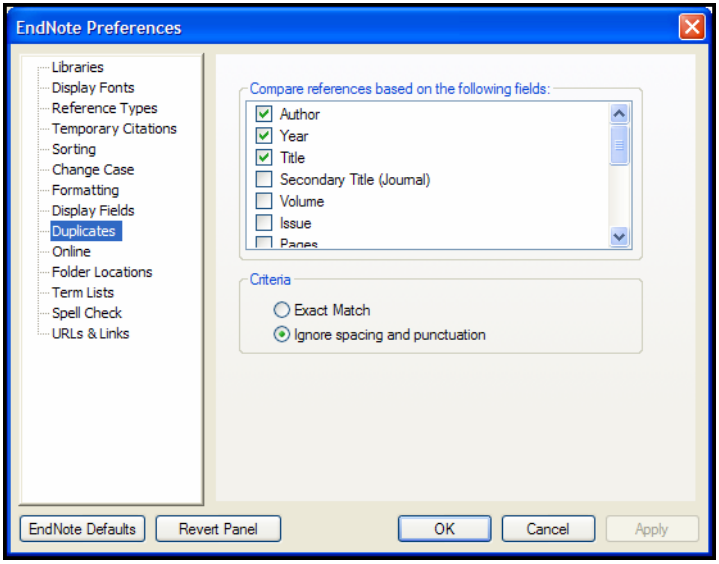
By default, EndNote identifies duplicate references in a library as references of the same reference type with matching Author, Year, and Title fields. Use this panel to customize the way EndNote identifies duplicate references.

- 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 "Reference Types and Fields" on page 619. 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.



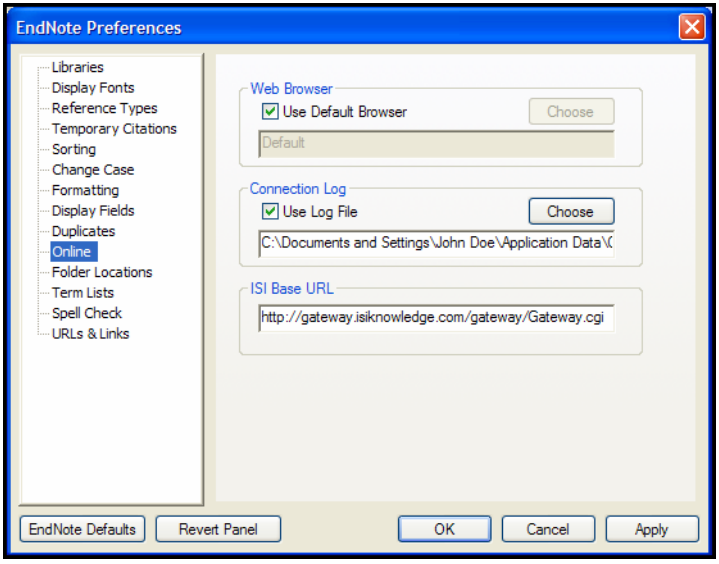
NOTE: These settings do not apply to the "Merge Duplicates in Bibliography" setting (page 530). That specific comparison of reference data is used only to remove identical references from bibliographies.

Online Preferences

Web Browser Settings

Use the *Online* preferences panel to select the Web browser that should open when the *Open Link* command is activated or when you click on an active URL (Internet address).

- Select "Use Default Browser" to have EndNote use the browser that your System identifies as the default browser.
- To select a different Web browser, clear the "Use Default Browser check box, click *Choose*, locate the Web browser on your hard drive, and click *Open*. (EndNote does not include a Web browser.)



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 unchecking 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 page 188).

By default, the Connect.log file is stored in the Documents and Settings\User Name\Applicaton Data\EndNote folder. 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.

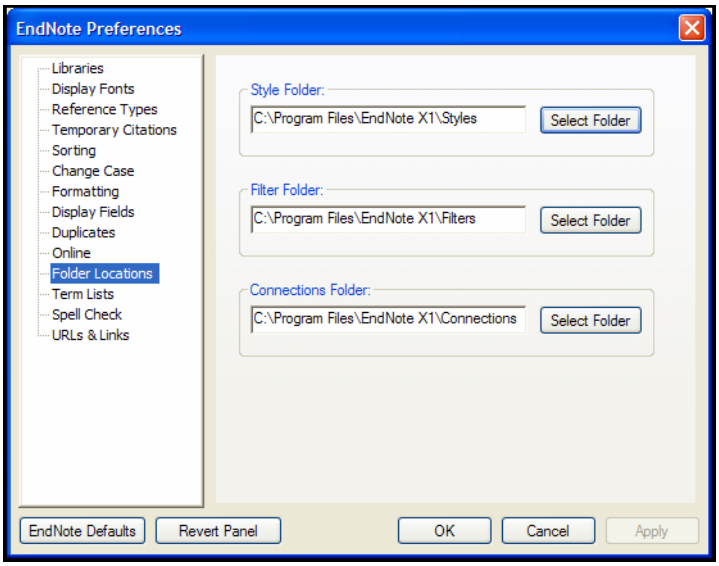
If your institution uses a locally mounted version of Web of Science, you should enter the URL for that server here in EndNote's ISI Base URL preference. Otherwise, the links in references downloaded from Web of Science will take you to the main Web of Science server where you might not have access.

Folder Locations

The *Folder Locations* preferences panel is where you set the default location of your styles, import filters, and connection files. By default, EndNote sets these locations to be the Styles, Filters, and Connections folders in the EndNote program folder.

All of the style, filter, or connection files stored in the chosen folders are displayed in the Style, Filter, and Connection

Managers. These Managers allow you to select individual files that you use most with EndNote.



To change any of these folder locations, 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.*

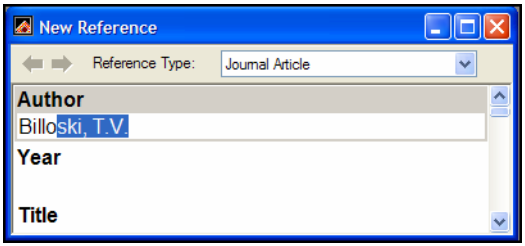
Term Lists

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 (typing the surname first), 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. More information about working with term lists is provided in Chapter 9.

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 page 251).



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" on page 247).

Update lists during data entry

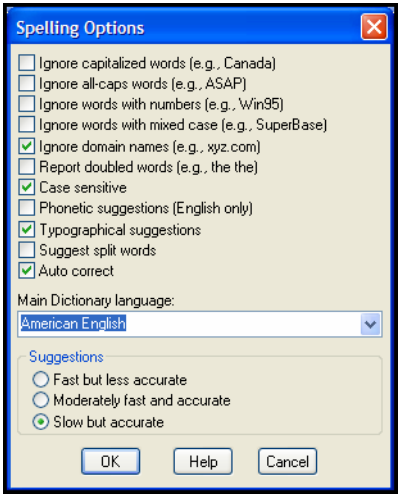
When this option is selected, the term lists are automatically updated as you type in new reference data. If you turn this option off, you can always manually update your term lists by selecting *Define Term Lists* from the *Tools* menu, highlighting a term list, and clicking *Update List* (see "Manually Updating Term Lists" on page 247).

Spell Check

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 "Spell Checking" on page 162.

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 EndNotes's Spell folder. Select your primary language. If you want to apply additional language dictionaries, see the next section, "Modifying Dictionaries".
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, click the *Help* button on the dialog or press F1.

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, click the *Help* button on the dialog or press F1.

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 not 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.

NOTE: For a list of supplied dictionaries with corresponding file names, see "Dictionaries Supplied with EndNote" on page 540.

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 that include non-ASCII characters	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	sscеam.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	sscеit.tlx
Norwegian (Bokmal)	sscenb.tlx
Portuguese (Brazilian)	sscepb.tlx
Portuguese (Iberian)	sscepo.tlx
Spanish	sscesp.tlx
Swedish	sscesw.tlx

URLs & Links

This preference panel includes options for two unrelated items: OpenURL settings and the default setting for inserting attached files.

OpenURL

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).

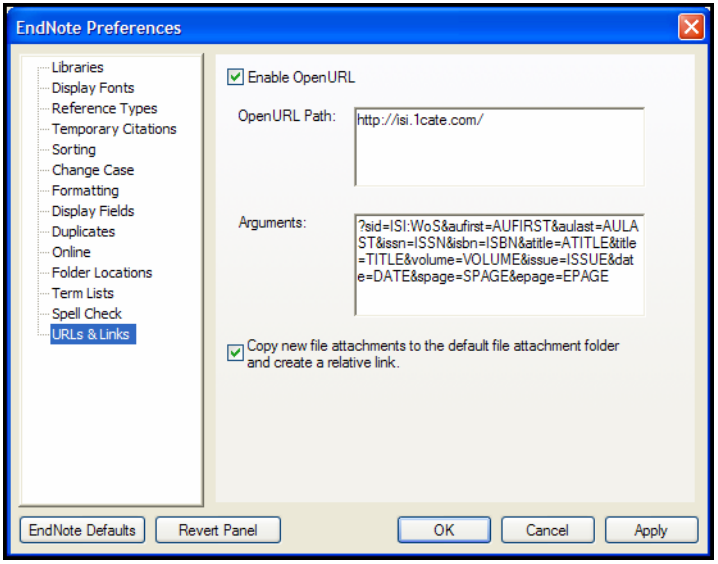
The OpenURL section includes these settings:

Enable OpenURL: Select the check box to enable the OpenURL link option found on the EndNote *References* menu. The OpenURL Link command is available only when it is enabled here and a reference is open for viewing. By default, this feature is disabled.

The next two options on the OpenURL panel are available only when the Enable OpenURL box is selected.

OpenURL Path: EndNote supplies a default path for your browser, linking to an ISI server. If you have access to a different OpenURL server, you should enter that path here.

Arguments: 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.



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 it.

- 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.

Cite While You Write Preferences

You can access the Cite While You Write preferences in one of several ways:

- From the *Tools>EndNote X1* menu in Microsoft Word, select *Cite While You Write Preferences.* **Word 2007**: 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: Microsoft Word must be open in order to access *CWYW Preferences* from the *Tools* menu in EndNote.

Several EndNote preferences also directly affect Cite While You Write.

General Preferences

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 X1* menu and select *Cite While You Write Preferences*. **Word 2007**: 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.

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" on page 303.

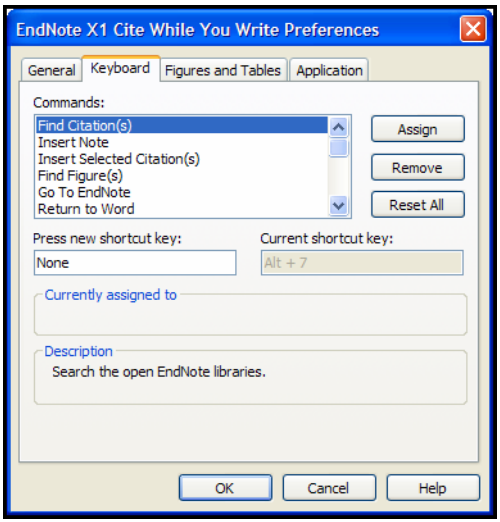
Keyboard Shortcuts in Word

Keyboard shortcuts for EndNote's Cite While You Write commands are available in Word.

To add or change a keyboard shortcut:

1. From Word's *Tools>EndNote X1* menu, select *Cite While You Write Preferences*. **Word 2007**: 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.

   Keyboard shortcuts work in both EndNote and Microsoft Word.
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.

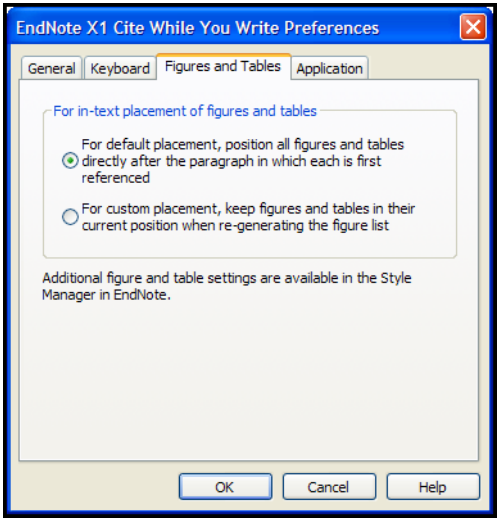
Figures and Tables in Word

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 "Figure and Table Placement and Captions" on page 452.

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. 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.

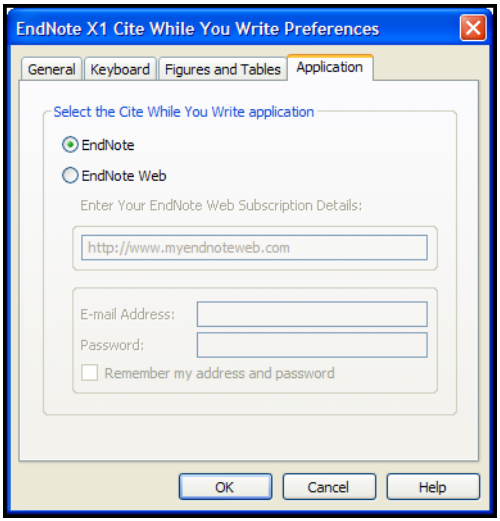
EndNote Application for CWYW

Use the Application tab to indicate which version of EndNote to use (EndNote desktop or EndNote Web) when you Cite While You Write. For more information about EndNote Web, see Chapter 19, "Transferring Between EndNote Desktop and EndNote Web Libraries."

To select the appropriate application:

1. From Word's *Tools>EndNote X1* menu, select *Cite While You Write Preferences*. **Word 2007**: On the EndNote tab, in the Tools group, click *Preferences*.

2. Click the Application tab. (This tab is available only when EndNote Web files are installed.)



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.

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 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*, described on page 523
- *Formatting*, described on page 529

These settings are stored with the EndNote program's preferences because they apply to formatting papers with either Cite While You Write for Microsoft Word files or Format Paper for RTF files.

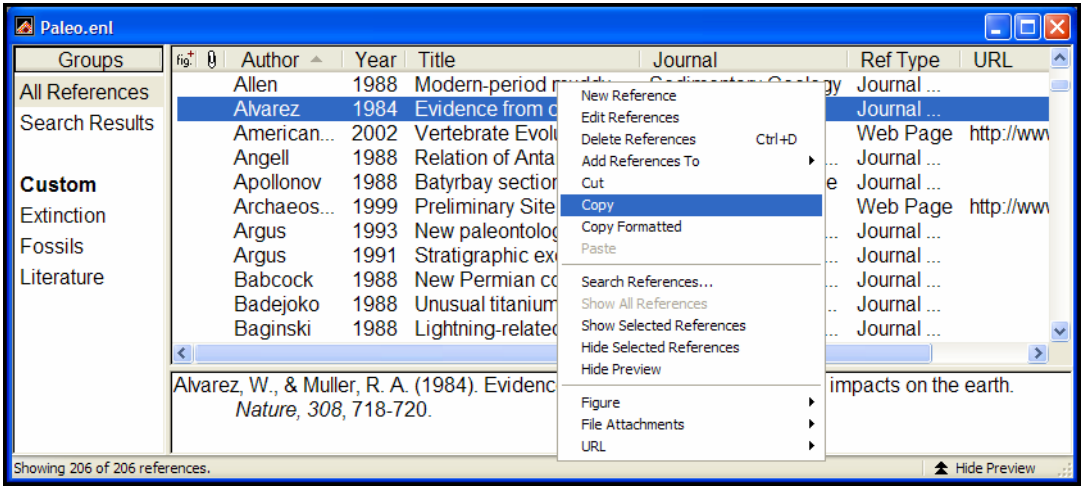
Shortcuts to Make Using EndNote Easier

Contextual 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" on page 544.

Shortcut Menus

As a convenience, EndNote provides 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 the Library window, or the 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 the shortcut menus has exactly the same results as choosing the command from the main menu or a 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 for the following windows: references, libraries, term lists, search, retrieved references, and Managers (styles, filters, and connections).

Toolbars

Toolbars are available in EndNote to give you quick access to some of the commonly used commands. There are several toolbars (Main, Text, and CWYW); each is described below. To display a particular toolbar, choose *Show Toolbar* from the *Tools* menu, and select the desired toolbar to show. If a toolbar is currently showing, it will have a check mark next to its name in the *Show Toolbar* menu. At that point, choosing it from the *Show Toolbar* command will hide it.

Main Toolbar



Commands on the main toolbar include (from left to right): *New Library, Open Library, Print, Cut, Copy, Paste, Sort References, New Reference, Online Search, Open Link, Open File, Import, Export*, *Spell Check* (available when a record is open for editing), *Attach Figure*, *Show/Hide Groups*, a style menu, *Help*, *Search Library*, and a *Quick Search* text box/menu.

The 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 also "The Style Manager" on page 404.

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 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).

CWYW Toolbar



The CWYW toolbar is available only when Microsoft Word is running and Cite While You Write support is installed. The commands on the toolbar are (from left to right): *Insert Citation(s), Format Bibliography*, and *Return to Word.*

A complete CWYW toolbar is available within Word. See "Notes about Microsoft Word" on page 268.

Chapter 19

Transferring Between EndNote Desktop and EndNote Web Libraries

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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 ISI Web of Knowledge, PubMed, and hundreds of online library catalogs to help build a personal reference collection. EndNote Web includes unique integration for ISI 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 2,800 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.

For more information about EndNote Web, or to subscribe, go to http://www.endnoteweb.com or contact the Thomson ResearchSoft 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. This chapter describes both processes.

Before You Begin

You can 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.
- Fonts and styles that are manually applied to individual references will be lost when transferring references to or from 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.

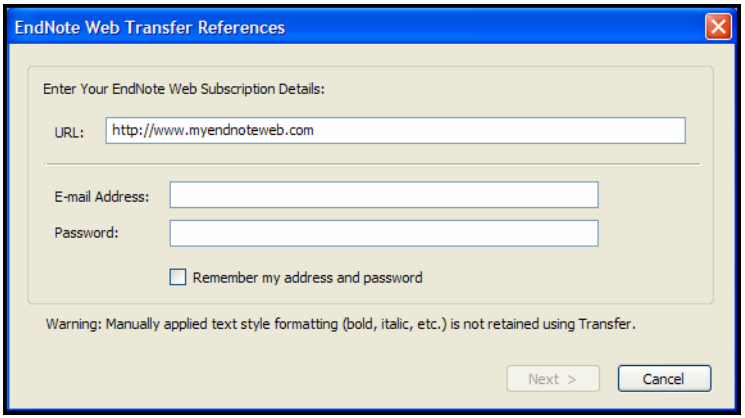
Transferring References

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.

To transfer references:

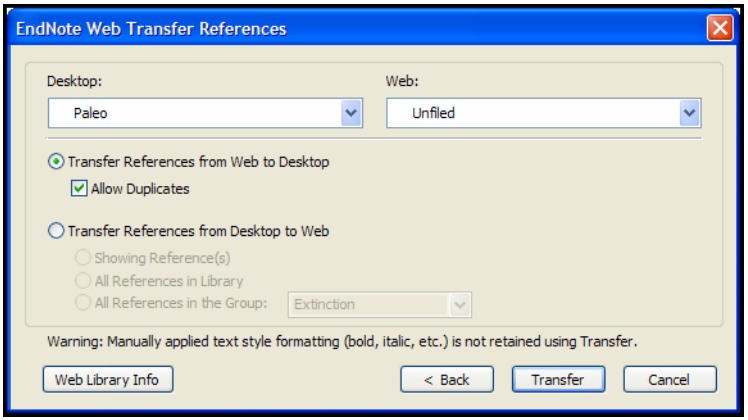
1. Open your EndNote desktop library.

2. From the *Tools* menu, select *EndNote Web*.



3. Enter your connection 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
   - If you would like your email address and password remembered for future sessions, select the "Remember my address and password" check box.

   Then, click *Next* to establish a connection and continue.



4. On the EndNote Web Transfer References dialog:
   a. Under "Desktop," select the appropriate EndNote desktop library. The currently active library is displayed

in the list. Use the drop-down list to select from additional open libraries.

NOTE: If a library is designated read-only, a symbol of a lock will appear next to the filename. In order to transfer references into a library, the library must have read-write access.

b. Under "Web," select the appropriate EndNote Web folder.

c. 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 only the 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 read-only CD or a locked partition.

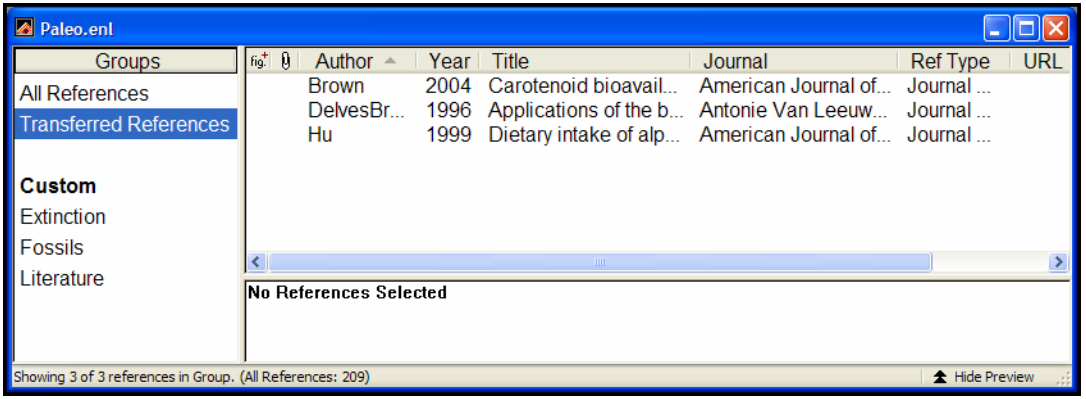
d. Click *Transfer* (or press Enter) to start transferring references.

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 an EndNote Web library into an EndNote desktop library, a new temporary group named

"Transferred References" will appear in the Groups pane of the Library window.



This is an easy way to see only the references you have just transferred into your desktop library. If you transfer references from EndNote Web again, this temporary group is replaced with the new set of references. When you close the library, the group is removed (the references themselves are still in the library).

Because the Transferred References group is deleted when you close the library, so you may occasionally want to save that set of references to a custom group so that it is available during a later session.

To save the temporary Transferred References group as a custom group:

1. Click on the Transferred References group to display the list of references in the group.
2. From the *Edit* menu, choose *Select All* to select all of the references in the list.
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 EndNote desktop and EndNote Web.

For general information about how to Cite While You Write, see Chapter 10, "Using EndNote with Microsoft Word."

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" on page 557.
- 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. In Word, go to the *Tools>EndNote X1* menu and choose *Format Bibliography*. **Word 2007**: 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

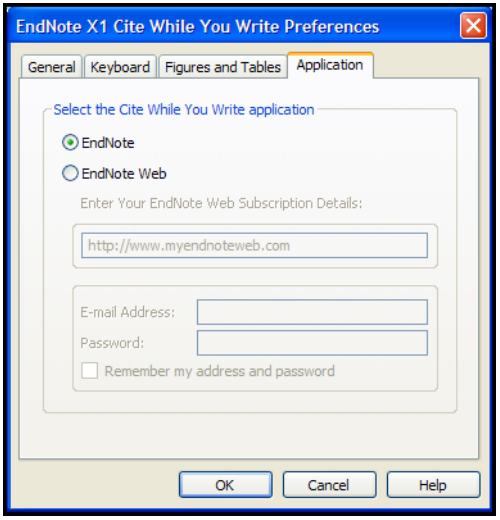
You can use Cite While You Write with either your desktop version of EndNote or EndNote Web; a Cite While You Write plug-in for Microsoft Word is installed for each application. Use

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 a version of EndNote for Cite While You Write:

1. In Word, go to the *Tools* menu, choose *EndNote X1*, and then *Cite While You Write Preferences*, or, click the *EN Pref* icon on the EndNote toolbar. **Word 2007**: 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.
   - **EndNote Web** is the online Web version of EndNote. 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

An EndNote toolbar is available 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* (the desktop application) or *EndNote Web*.

Word 2007: The EndNote tab will indicate either EndNote or EndNote Web.

Chapter 20

Using EndNote on Palm OS Handhelds

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Overview of Using EndNote on Palm OS Handheld Devices

The EndNote application for Palm OS® handheld devices 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 version of EndNote and/or into your handheld device. You can then synchronize files between your desktop EndNote library and your handheld EndNote library using standard HotSync® commands.

You can also beam individual references to another Palm OS handheld.

Installing EndNote for Palm OS

Installing your EndNote for Palm OS involves several steps. First, make sure you meet the hardware and software requirements. Then, follow the instructions for "Installing EndNote for Palm OS" on page 564.

Hardware and Software Requirements

Requirements for running EndNote for the Palm Operating System include:

- Handheld device
- Palm Operating System 4.x or later
- Serial or USB communication for HotSync operations
- 16 MB RAM

EndNote is compatible with any handheld device that meets the hardware and software requirements, such as those devices listed in the following table. While this is not a comprehensive list, it includes many of the qualifying devices.

Brand	Model	Palm OS	Memory
Palm®	Treo™ 90		
Palm	Treo 600	Palm OS 5	24 MB RAM
Palm	Tungsten™ C	Palm OS 5.2.1	64 MB RAM, 52 MB Storage
Palm	Tungsten E	Palm OS 5.2.1	32 MB RAM, 28.3 MB Storage
Palm	Tungsten T2	Palm OS 5.2.1	32 MB RAM, 28.3 MB Storage
Palm	Tungsten T3	Palm OS 5.2.1	64 MB RAM, 52 MB Storage
Palm	Tungsten W	Palm OS 4.1.1	16 MB RAM
Palm	Zire™ 21	Palm OS 5.2.1	8 MB RAM, 7.2 MB Storage
Palm	Zire 71	Palm OS 5.2.1	16 MB RAM, 13 MB Storage
Sony®	CLIÉ®	Palm OS 5	
Sony	PEG-NZ90 CLIÉ	Palm OS 5	
Sony	PEG-NX60 CLIÉ	Palm OS 5	
Sony	PEG-NX70V CLIÉ	Palm OS 5	
Sony	PEG-NX73V CLIÉ	Palm OS 5	
Sony	PEG-NX80V CLIÉ		
Sony	PEG-SJ20 CLIÉ		
Sony	PEG-SJ33 CLIÉ		
Sony	PEG-TG50 CLIÉ	Palm OS 5	
Sony	PEG-TJ25 CLIÉ		
Sony	PEG-TJ35 CLIÉ		
Tapwave	Zodiac		

Installing EndNote for Palm OS

Installing EndNote for Palm OS involves several steps. First, make sure you meet the hardware and software requirements listed in the previous section. Then, you must:

1. Check your HotSync connection to make sure it is working.
2. Install the EndNote Palm OS software.
3. Designate a single EndNote library for synchronizing.
4. Perform an initial HotSync operation to copy EndNote software to the handheld device, and then perform a second HotSync operation to copy the EndNote library to the handheld device.

First, check your HotSync connection:

Before you begin, make sure your Palm OS handheld application software is installed. Perform a HotSync operation to make sure you are able to send files between your Palm desktop application and your Palm OS handheld device.

Then, install EndNote for Palm OS software:

It is best to install your Palm software (the application software that came with your handheld device) *before* installing or updating to EndNote X. As you install EndNote, you will be asked whether you want to install the EndNote for Palm OS software.

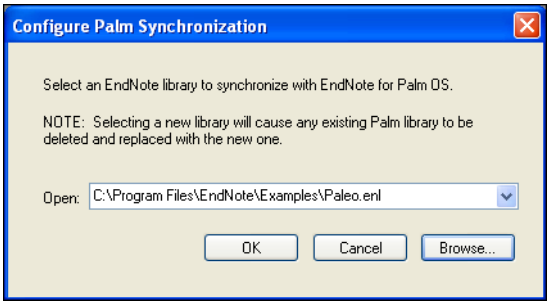
NOTE: You may have already installed the Palm OS software when you installed EndNote! Look for the EndNote application on your Palm handheld device.

If you installed EndNote and *then* installed your Palm application software, you can install EndNote for Palm OS in one of two ways:

- Run the EndNote installer again, choose *Modify*, and select EndNote for Palm OS to install.
- From your Windows Control Panel, choose *Add or Remove Programs*, click *Change*, and install EndNote for Palm OS.

In EndNote, designate a library for HotSync operations:

1. From the *Tools* menu in EndNote, select *Configure Handheld Sync*.



2. Select an EndNote library from the existing drop-down list or use the *Browse* button to locate your EndNote library.

NOTE: The Palm OS will accept a library filename that contains up to 26 characters. You will not be able to sync a library with a longer filename.

---

3. Click *OK* to save the setting.

NOTE: You can update your Palm device with only a single library. If you perform a HotSync operation with a new library, any existing library on your Palm device will be replaced.

Use the HotSync Manager to set up your handheld device:

Perform an initial HotSync Operation to copy EndNote for Palm OS software to your handheld device. (For information about how to use the HotSync Manager, see the "Synchronizing Libraries" section that appears below.)

Then, perform a HotSync operation again to copy your EndNote library to your handheld device.

Synchronizing Libraries

Use standard HotSync instructions to synchronize your desktop EndNote library and your handheld EndNote library. For example, by pressing the HotSync button on a cradle or cable, or by using the HotSync application on the handheld:



A HotSync operation cannot be initiated from within EndNote. See your handheld device documentation for additional information about performing a HotSync operation.

The first time you synchronize your desktop EndNote library with your handheld device, the EndNote for Palm OS is copied to your handheld device. Subsequent HotSync operations synchronize the designated library.

NOTE: The handheld library must reside in main Palm memory; you cannot save a library to an expansion card.

Notes about Synchronization:

- You can synchronize your handheld library to a single desktop PC.
- The Palm OS 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 Palm OS handheld. In EndNote, go to the *Tools* menu, select *Configure Handheld Sync*, and use the dialog to select a library.
- By default, a HotSync 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. However, if you edit the same reference in the desktop library *and* the handheld library, neither record will be overwritten. A second, almost duplicate record will be created.
- You cannot copy only selected references to your handheld 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 handheld device with that interim library.

- If you want to enter references on your handheld, but not maintain the full desktop library on your handheld, 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 HotSync settings to always overwrite the interim library with your Handheld library.
- The Palm OS reference size limit is 64K. Longer references are truncated, and a message is written to the HotSync Log.
- The Palm OS is not Unicode compliant, so certain characters that display properly in EndNote may not convert to your Palm device. During a HotSync operation, a message is written to the HotSync Log when characters do not convert correctly and are replaced by a question mark (?).
- Only the name of the image is displayed in an image field on your handheld device. The image name is locked (you cannot edit it) so that the file attachment in the desktop library will remain intact. Images cannot be added on the handheld. If you delete a reference with an image from your handheld device, synchronizing will delete both the reference and its corresponding image from the desktop library.

Starting EndNote for Palm OS and Displaying References

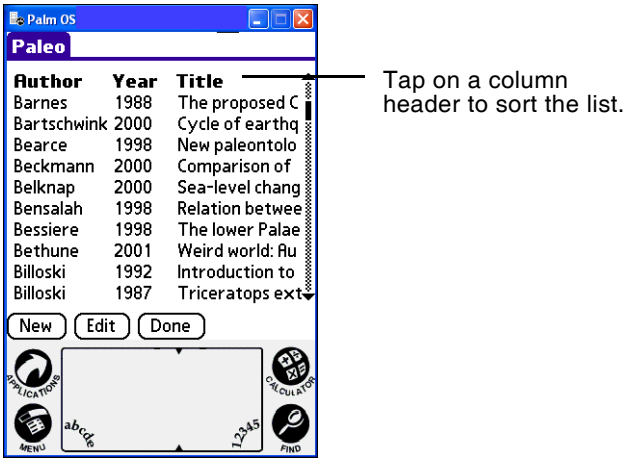
To start EndNote for Palm OS and open the EndNote library:

1. On your handheld device, list the Applications available and tap on the EndNote icon.



EndNote displays the name of the designated library.

2. Highlight the library name and tap *Open* to display the reference list (or select *Open* from the *EndNote>Library* menu).



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 handheld device.
- To jump to a particular reference, enter characters with the Palm keyboard or text pad 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."
- Tap on a row to select it. Select multiple rows by tapping on each one. Tap again to deselect a row. To deselect all rows, tap below the list of references, to the right of the *Done* button.
- To create a new reference, tap the *New* button.

- To open a reference for viewing or editing, tap twice on the row. Or, highlight the reference and tap *Edit*.

Viewing Library Statistics

To view statistics about the EndNote library on your handheld device:

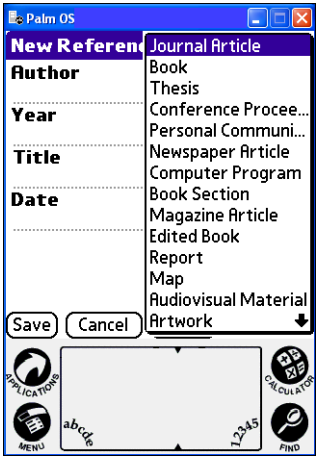
1. Start the EndNote for Palm OS application on your handheld device.
2. Highlight the name of your library.
3. Tap the *EndNote* menu, then the *Library* menu, then *Info* to display statistics about the highlighted database. Or, tap the *Info* button.

Statistics include the date created, the date modified, the file size, and the number of records found in the library.

Entering, Editing, and Deleting References

To enter a new EndNote reference on your handheld device:

1. Display the EndNote library reference list.
2. Tap *New* to display a New Reference template.
3. Use the drop down list to select a reference type.

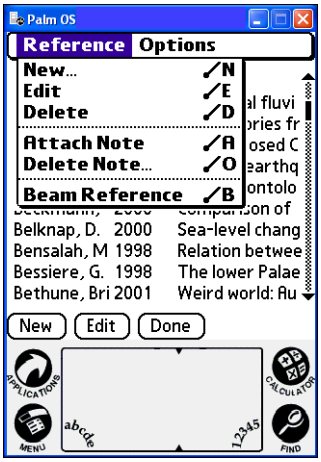


4. Enter your text into the appropriate fields. See "Notes about entering and editing references" on page 570 for more information about this display.

5. Tap *Save* to add the reference to your handheld EndNote library.

To edit or delete a reference on your handheld device:

1. With the reference list displayed, tap to highlight the reference you want to edit or delete.
2. Tap the library name in the title bar and display the *Reference* menu.



3. From the *Reference* menu, select:
   - *Edit* to open the highlighted reference for viewing or editing
   - *Delete* to delete the highlighted reference

   These additional commands are also available:
   - *New* to create a new reference
   - *Attach Note* to add text to the Note field of the highlighted reference
   - *Delete Note* to delete text from the Note field of the highlighted reference.

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 top right corner displays the current reference type. Tap on the arrow to show the complete list of reference types and select one.

- Use the up and down scroll arrows to scroll and/or navigate through records, depending on the setting under Preferences (See "EndNote Preferences" on page 572).
- Use the left and right navigation arrows to browse through references in the current sort order. (The navigation arrows are not available when you are creating a new record.)
- 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, tap on the field to open a full-screen display (where you can view and edit the entire field).
- To access standard editing commands, first put the cursor within a field. Then, tap the library name in the title bar, then the *Edit* menu.
- Tap the *Note* button to easily add text to the Note field in the reference.
- To delete a note, tap the title bar, then the *Reference* menu, then *Delete Note*.
- The Palm OS "Private" record feature is not available.
- The Palm OS reference size limit is 64K. Text beyond that amount is truncated when you save the reference.

Searching a Handheld Library

To jump to a particular reference in the reference list:

Enter characters with the Palm keyboard or text pad 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."

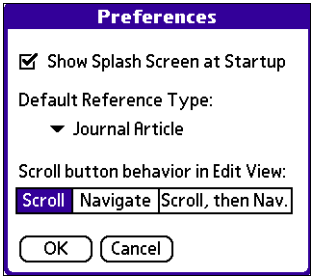
To search all fields in all applications:

1. Display your EndNote library reference list.
2. Bring up the Find dialog in one of these ways:
   - Tap the Find icon (magnifying glass) on your Palm device, or,
   - From the *Reference* menu, choose *Find*.
3. Enter the word or phrase you wish to locate.
4. Tap *OK*, and the matching references appear in a list.
   - Matching EndNote references are listed. Clicking "Find More" brings up additional matches from other applications on your Palm device.

- Tap an EndNote reference in the list to return to the full reference list with that single reference highlighted.
- To return to the previous view, tap *Cancel*.
- The search results are not saved when you leave the search results list. However, the Find feature retains your last search request so it is easy to run it again.

EndNote Preferences

Several preferences are available in EndNote for Palm OS. With your reference list showing on your handheld device, tap the library name in the title bar, the *Options* menu, and then *Preferences*.



Show Splash Screen at Startup

Use this option to enable or disable the splash screen display that appears when you start the EndNote for Palm OS application.

Default Reference Type

Use the list to select a default reference type to assign to new references added to your handheld. You can always change the reference type when entering or editing a reference.

Scroll button behavior in Edit View

Select the behavior of scrolling buttons while in Edit view:

- *Scroll*: The scroll button scrolls through the fields of the current reference.
- *Navigate*: The scroll button navigates forward and backward through references.
- *Scroll then Nav.*: The scroll button scrolls until the end of the current reference, then navigates to the next reference.

Beaming References Between Handhelds

You can beam a single reference or a group of highlighted references to another Palm OS handheld device.

NOTE: You cannot beam the EndNote for Palm OS application itself, and you cannot beam an entire library.

To beam a reference or group of references to another Palm device:

1. Make sure the EndNote for Palm OS application is installed on both Palm OS handheld devices.
2. On the handheld that contains the reference(s) you wish to beam, display the list of references in the List view.
3. Highlight the reference or references you wish to beam to another handheld.
4. From the *Reference* menu, select *Beam Reference*.
5. On the receiving handheld, tap *Yes* on the Beam Receive dialog to accept the reference(s).

   On the handheld that is accepting the beamed references, EndNote for Palm OS opens to the list view and highlights the new reference(s) in the list of references.

Chapter 21
Using EndNote On a Network

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Using EndNote On a Network

The network edition of EndNote is licensed for a particular number of users. You can install EndNote on a shared network for simultaneous use, or you can install it locally for each of the licensed users. In either configuration, users can access a common library on a server or their own personal library. In addition they can edit their own styles, filters, and connection files and configure the EndNote preferences for their own requirements.

EndNote is a network-compatible product. This means that you can access an EndNote library or an EndNote program installed on a network server. However, there are several issues of which you should be aware before you use EndNote on a network.

Licensing of Network Copies

Thomson Corporation 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.

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" on page 119). Because of this, EndNote can be used in a mixed platform network environment very easily. We have successfully tested EndNote on mixed platform AppleShare, Novell Netware, and Windows networks, and PC-specific networks including Windows for Workgroups.

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.

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 and Novell 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 server on which you install EndNote, and the environment in which EndNote will be used, must support long file names.

Installing EndNote on a Network Drive as a Shared Application

For mass installation of the full program, see "Mass Program Installations" on page 584.

Before You Begin Network Installation

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 2000 with Service Pack 3 or later. EndNote X1 will not run under any earlier versions. We recommend using Windows XP with Service Pack 2 or Windows Vista.
- The installer requires the MSI 3.0 runtime environment, which may not be installed under Windows 2000 (SP3). When installing under Windows 2000 (SP3), run the EXE file first to ensure the MSI 3.0 runtime environment is installed, and then run the MSI installer.
- Make sure the server supports long file names. EndNote X1 includes many files with long file names. If the server (or volume) does not support long file names, EndNote X1 cannot be used on it.
- Make sure file locking is enabled on the server. EndNote requires file locking. For example, is the locking daemon running on an NFS server?

To install and share an EndNote program involves three different installations, performed in this order:

1. Install the shared EndNote program on a network drive.
2. Run the Netsetup program from each computer workstation to link it to the shared program.
3. (Optional) Run Configure EndNote to register Cite While You Write and Palm OS support for each other user on the workstation.

EndNote requires that a system be capable of running 32-bit Windows programs. Windows 2000 (SP3), XP (SP2) or Vista must be installed on each workstation that will be used to run EndNote, regardless of whether the program files are stored on a local hard disk or on a shared network volume.

Installing the Shared EndNote Program

An ENX1Inst.msi file is provided on the product CD in an MSI folder.

To install a shared EndNote program:

1. Log on to the network (or server) using an administrative account that has full read/write access to the server where EndNote will be installed.
2. Run the installer in Admin mode (/a on the command line):

   msiexec /a ENX1Inst.msi
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 ENX1Inst.msi file and a license.dat file in the target directory.
4. Go to the target directory, make sure both ENX1Inst.msi and license.dat are present, and run the ENX1Inst.msi file to install the program. (Do not run in Admin mode this time.)
5. On the EndNote CD-ROM, browse to the \Extras\Netsetup subfolder and copy the following files from the CD to the EndNote folder on the server:

   INSTMSI3.EXE
   NETSETUP.EXE
   NETSETUP.MSI
   NETSETUP.INI
6. Verify that EndNote is installed correctly, and then set appropriate permissions for the EndNote files and folders.

   We recommend that all of the files listed above be set to read-only access. We also recommend that all of the EndNote content files and folders be set to read-only access, to avoid inadvertent changes by users. Content folders include Connections, Filters, and Styles.

   You need to Share the EndNote program. If EndNote is not installed on a shared drive or folder, see your Microsoft Windows documentation for information about sharing files and folders.

Now, you need to install to connect individual workstations to the shared EndNote program as described next.

Installing to Link Workstations

You must have the EndNote program installed and shared as described in the previous section before you can link workstations to it. The EndNote workstation installation utility (Netsetup) creates program items for a shared installation of EndNote. To quickly link many workstations, see "Deploying Netsetup.msi with Group Policy" on page 581 or "Scripted Workstation Installations" on page 581.

NOTE: You must have administrative rights to run the workstation installation program.

Linking an Individual Workstation

To connect a single workstation to a shared installation of EndNote:

1. Log on to the workstation as an administrator.
2. Map the volume containing the shared EndNote program to a drive letter, if necessary.

NOTE: Make sure the drive mapping is the same for every user account that will access Endnote. For example, if the administrator account has the EndNote share mapped as drive L, and a second user account has drive L mapped to a completely different share, EndNote will not work for that second user.

3. Browse the network folder containing the shared EndNote program, and double click on Netsetup.exe to start the Workstation Installation Wizard.
4. Click *Next*.

   The wizard checks to make sure that the files EndNote.exe and Configure EndNote.exe are in the same folder as Netsetup.exe. If they are not found, you must click *OK* to exit the program and install or repair your EndNote program installation.
5. Click *Next* to begin the installation.
6. When the installation is done, click *Finish*.

NOTE: Clients using Windows 2000 (SP3) must download the GDI+ redistributable from Microsoft (go to http://www.microsoft.com/downloads and search for it.) Extract it and place a copy of it in the same directory as EndNote.EXE. This DLL, which is necessary for image support, does not ship with Windows 2000.

After installing to connect a workstation, you should be able to see EndNote shortcuts available from the *Start* menu. Go to *Start>All Programs>EndNote Net*. Available shortcuts include:

- **EndNote Help**, which launches the EndNote Help file. You can also access the Help file in the EndNote program from the Help menu or by pressing F1 on the keyboard to display context-sensitive help.
- **EndNote Manual**, which launches a PDF version of the full EndNote manual.
- **EndNote Program**, which starts the EndNote program.
- **Configure EndNote**, which is used to register Cite While You Write and Palm OS support.

Next, you need to configure support for Cite While You Write:

To register Cite While You Write and/or EndNote for Palm OS components on your workstation, see "Configuring EndNote (CWYW and Palm OS Support)" on page 583. These files can be configured for each additional user on a workstation (they are already there for the account that ran Netsetup).

Deploying Netsetup.msi with Group Policy

1. Open the Group Policy for the Domain or Organizational Unit (OU) you want to modify.
2. Under "Computer Configuration," expand "Software Settings" and click *Software Installation*.
3. Right-click "Software Installation" and choose *New>Package*.
4. Browse for the share from which Netsetup.msi will be deployed.
5. 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.

Scripted Workstation Installations

Use a scripted installation to link multiple workstations to a shared installation of EndNote. You must have the EndNote program installed and shared before you can link workstations to it.

The installation of workstations with Netsetup.exe can be controlled through the use of an initialization file. If Netsetup finds a file called "Netsetup.ini" in the same folder, it will use the values specified in the initialization file. A sample Netsetup.ini

is included in the Extras directory of the EndNote CD as well as a Netsetup.msi file.

NOTE: You must log on as an administrator in order to use Netsetup to install workstations.

Netsetup.ini contains these sections and keys:

[addins] section - This section controls whether Cite While You Write should be installed for the current user, and whether it should be the default citation manager in Word 2007:

installcwyw

yes - install Cite While You Write if a compatible version of Microsoft Word is detected

no- do not install the CWYW add-in

defaultrm

yes - make EndNote the default reference manager for Word 2007 (suppressing the Citations and Bibliography group on Word's Reference tab)

no - while CWYW will be installed, the native Word 2007 citation and bibliography commands will still also be available

[palm] section - This instructs "Configure EndNote.EXE" to install EndNote for Palm OS for the current user. It also instructs whether or not Netsetup can be run in silent mode based on this setting. If silent installation is enabled, Netsetup will install Add-ins for detected word processors specified in the add-ins section.

installpalm

yes - Install EndNote for Palm OS support

no - Do not install EndNote for Palm OS support

[options] section

silent

yes - install without user prompts

no - install with user prompts

Configuring EndNote (CWYW and Palm OS Support)

Once the EndNote program is installed and shared, and individual workstations have been linked to the shared program, you can configure additional Cite While You Write or EndNote for Palm OS components on a linked workstation for specific users. Administrator access is not required to do this; anyone that can log into the workstation can configure these features.

NOTE: Before you can configure CWYW or EndNote for Palm OS support, the EndNote program must be installed and shared, and the workstation files must be installed.

Do this for additional users on each workstation (configuration is already done for the account used to run Netsetup).

To configure Cite While You Write or EndNote for Palm OS components on an individual workstation for a specific user:

1. Log on to the workstation as the current user. You do not have to be an administrator.
2. Launch the configuration utility. You can do this in one of these ways:
   - From the Windows *Start* menu, choose *All Programs>EndNote Net>Configure EndNote*.
   - Or, go to the shared EndNote program folder and double-click "Configure EndNote.exe."

NOTE: If the utility detects an incomplete EndNote installation, it will prompt to uninstall the EndNote configuration for the current user. An administrator must repair the EndNote application and workstation installation.

3. On the Welcome screen, select *Configure EndNote for Current User* and click *Next*.
4. On this screen, select whether to register support for Cite While You Write in Word and whether to register Palm handheld support for the current user.
   a. The EndNote installer copied Cite While You Write files to the Program Files\Common Files\Thomson ResearchSoft folder. In order to use Cite While You Write, this option will register Cite While You Write support for the current user account.
   b. If Palm Desktop software is detected, this option is selected by default. Leave this component checked, or

uncheck it if you do not wish to install EndNote on your handheld device.

c. Click *Next*.

5. On the Final Installation Complete screen, click *Finish*.

Mass Program Installations

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 2000 with Service Pack 3 or later. EndNote X1 will not run under any earlier versions. We recommend using Windows XP with Service Pack 2 or Windows Vista.
- The installer requires the MSI 3.0 runtime environment, which may not be installed under Windows 2000 (SP3). When installing under Windows 2000 (SP3), run the ENX1Inst.EXE file first to ensure the MSI 3.0 runtime environment is installed, and then run the ENX1Inst.MSI.

The product CD includes an ENX1Inst.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.

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" on page 589 for guidance. If you need additional information, refer to Microsoft's mass installation documentation and command line documentation, or http://www.microsoft.com.

Easy Deployment

You must run the MSI installer in Administrative Mode in order to enter your EndNote volume license product key.

Recommended easy installation:

1. Run the installer in Admin mode (/a on the command line):

   msiexec /a ENX1Inst.msi

2. 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 ENX1Inst.msi file and a license.dat file in the target directory.

3. Deploy ENX1Inst.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.

4. (Optional) For each additional user account on a computer, log in (administrative rights are not necessary), go to the *Start* menu, look under *All Programs>EndNote* and run *Configure EndNote* to configure Cite While You Write and Palm OS support for the current user. You must do this if you want to use these EndNote features.

Using the volume installer to install on an individual computer:

1. Run the installer in Admin mode (/a on the command line):

   msiexec /a ENX1Inst.msi

2. 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 ENX1Inst.msi file and a license.dat file in the target directory.

3. Distribute both the ENX1Inst.msi and license.dat file to the user. For example, you can copy them to a shared network drive or a CD.

4. The user should then copy the two files, ENX1Inst.msi and license.dat to the same folder on his/her individual computer.
5. The user should log on to the computer with administrative rights, and then run ENX1Inst.msi to install the EndNote program. (Do not run in Admin mode this time.)
6. (Optional) For each additional user account on the computer, log in (administrative rights are not necessary), go to the *Start* menu, look under *All Programs>EndNote* and run *Configure EndNote* to configure Cite While You Write and Palm OS support. You must do this if you want to use these EndNote features.

Deploying the EndNote Installer with Group Policy

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)

New Installations

You must run the MSI installer in Administrative Mode in order to enter your EndNote volume license product key.

To deploy across an organization with Group Policy:

1. Run the installer in Admin mode (/a on the command line):

   msiexec /a ENX1Inst.msi

2. 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 ENX1Inst.msi file and a license.dat file in the target directory.

3. Open the Group Policy for the Domain or Organizational Unit (OU) you want to modify.
4. Under "Computer Configuration," expand "Software Settings" and click *Software Installation*.
5. Right-click "Software Installation" and choose *New>Package*.
6. Browse for the share from which ENX1Inst.msi will be deployed. (Make sure the required license.dat file is in the same folder.)
7. 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.
8. (Optional) For each additional user account on a computer, log in (administrative rights are not necessary), go to the *Start* menu, look under *All Programs>EndNote* and run *Configure EndNote* to configure Cite While You Write and Palm OS support for the current user. You must do this if you want to use these EndNote features.

Upgrade Installations

To upgrade your current installations:

1. Run the installer in Admin mode (/a on the command line):

   msiexec /a ENX1Inst.msi
2. 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 a license.dat file and an ENX1Inst.msi file in the target directory.
3. Open the Group Policy for the Domain or Organizational Unit (OU) you want to modify.
4. Under "Computer Configuration," expand "Software Settings" and click *Software Installation*.
5. Right-click "Software Installation" and choose *New>Package*.
6. Browse for the share from which ENX1Inst.msi will be deployed. (Make sure the required license.dat file is in the same folder.)
7. In the Deploy Software dialog, choose *Advanced* and then click on the Upgrade tab.

8. Under "Packages to Upgrade," click *Add* and choose the existing EndNote.

   Once the Group Policy is updated and the clients are restarted, the previous version of EndNote is uninstalled and the new version is installed.

9. (Optional) For each additional user account on the computer, log in (administrative rights are not necessary), go to the *Start* menu, look under *All Programs>EndNote* and run *Configure EndNote* to configure Cite While You Write and Palm OS support. You must do this if you want to use these EndNote features.

Scripted Program Installations

If your network is running Windows NT 4 network or a non-ADS network, use scripting for mass installations of the EndNote program. An ENX1Inst.msi file is provided on the product CD in an MSI folder.

NOTE: The installer requires the MSI 3.0 runtime environment, which may not be installed under Windows 2000 (SP3). When installing under Windows 2000 (SP3), run the ENX1Inst. EXE file first to ensure the MSI 3.0 runtime environment is installed, and then run the ENX1Inst.MSI.

To install via a command line:

1. First, run the installer in Admin mode (/a on the command line):

   msiexec.exe /a ENX1Inst.msi PIDKEY="<valid volume license key>" TARGETDIR="<valid path>"

   When the installation is complete, you will find an ENX1Inst.msi file and a license.dat file in the target directory.

2. Install ENX1Inst.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 /i D:\MSI\ENX1Inst.msi INSTALLDIR= "C:\Program Files\EndNote"

   To write a log file, use the "/l" switch described in the table that follows. The following example specifies installing EndNote on a computer using the ENX1Inst.msi file found on N:\EndNote\Program\" and writing a log file to C:\logs\ called endnotemsi.log using the verbose setting.

Example:
msiexec /i "N:\EndNote\Program\ENX1Inst.msi" INSTALLDIR="C:\Program Files\EndNote" /l*v! C:\logs\endnotemsi.log

Use the provided "MSI Command Line Options" on page 589 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

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.

Option	Parameters	Description
/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".

Option	Parameters	Description
/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.

Option	Parameters	Description
/? 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. Available starting with the Windows Installer version shipped with the Windows Server 2003 family and Windows XP SP1.
/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. Available starting with the Windows Installer version shipped with the Windows Server 2003 family and Windows XP SP1.

Custom Settings

EndNote allows you to customize many areas of the program to suit your needs. Many settings are saved for each computer.

General Preferences

Most general preferences are stored in the Windows Registry. For example, this includes EndNote Preferences, subject bibliography settings, and Cite While You Write settings. Storing these preferences in each user's profile allows multiple users to access the EndNote program from a single computer while saving each user's preferred 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 preference 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 preference for that computer and user.

If you create or modify a reference type for records in your EndNote library, you should make sure that the reference type is also modified on other computers that will access the library. See "Sharing Your Reference Type Table" on page 398.

Saved Searches

Search files are saved by default in the EndNote\Searches folder in your 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 search files use ".ENQ" as the file name extension.

Cite While You Write

Cite While You Write codes are directly compatible between Word 2000, XP, 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.

Uninstalling a Shared EndNote Program

Before uninstalling the EndNote program from a network server, you should first uninstall CWYW and Palm OS support and then uninstall all workstations from the shared copy of EndNote. Failure to do so may cause annoying (but harmless) error messages in copies of Word that have the Cite While You Write Add-in installed.

Uninstalling CWYW and Palm OS Support

If you used the "Configure EndNote.exe" utility to register Cite While You Write and/or Palm OS support on an individual workstation for a specific user, you must use that same utility to uninstall Cite While You Write and EndNote for Palm OS components. Administrator access is not required to uninstall these features. Uninstall these components *before* you uninstall a workstation or the EndNote program.

To uninstall support for Cite While You Write and/or EndNote for Palm OS:

1. Log on to the workstation as the current user. You do not have to be an administrator.
2. Launch the configuration utility. You can do this in one of these ways:
   - From the Windows *Start* menu, choose *All Programs>EndNote Net>Configure EndNote*.
   - Go to the shared EndNote program folder and double-click "Configure EndNote.exe."
3. On the Welcome screen, select *Uninstall EndNote Configuration for Current User* and click *Next*.
4. Continue through the uninstall process as instructed.

This uninstalls only CWYW and Palm OS support, and only for the current user.

Uninstalling a Workstation

If you used the Configure EndNote utility to install CWYW and Palm OS support on a workstation, please uninstall those files before uninstalling the workstation. Failure to do so may cause annoying (but harmless) error messages in copies of Word that have the Cite While You Write Add-in installed.

To unlink and remove a workstation installation from a shared installation of EndNote:

1. From the workstation you wish to uninstall, log on to the network as an administrator.
2. Run NETSETUP to remove the workstation. You can do this in one of these ways:
   - From the Windows *Start* menu, choose *Control Panel*, then *Add or Remove Programs*, and then *EndNote Network*.
   - Go to the shared application folder and double-click Netsetup.exe.
3. Select *Remove* to remove shortcuts, file type associations, merge modules, and components.
4. Click *Next*, and then click *Finish* when complete.

Uninstalling the Shared EndNote Program

Before removing a shared version of EndNote, you should first uninstall CWYW and Palm OS support for each user and then uninstall all workstations from the shared copy of EndNote. Failure to do so may cause annoying (but harmless) error messages in copies of Word that have the Cite While You Write Add-in installed.

To uninstall the EndNote program from a server:

Delete the entire EndNote X1 folder.

Uninstalling EndNote from a Local Computer

If you used the Configure EndNote utility to install CWYW and Palm OS support for additional users on a computer, please uninstall those files before uninstalling the workstation. Otherwise jump down to uninstalling the EndNote program.

To uninstall support for Cite While You Write and/or EndNote for Palm OS:

1. Log on to the computer as the current user. You do not have to be an administrator.
2. Launch the configuration utility. You can do this in one of these ways:
   - From the Windows *Start* menu, choose *All Programs>EndNote>Configure EndNote*.
   - Go to the shared EndNote program folder and double-click "Configure EndNote.exe."
3. On the Welcome screen, select *Uninstall EndNote Configuration for Current User* and click *Next*.
4. Continue through the uninstall process as instructed.

This uninstalls only CWYW and Palm OS support, and only for the current user.

Next, uninstall the EndNote program from the computer:

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 X1*.
5. Click the *Remove* button.

Appendix A

Making Backup Copies of Your EndNote Files

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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 the Windows Explorer or Windows desktop to copy your files to a CD or other portable storage device. This will work for your EndNote libraries unless they are too large to fit on one of these.

To backup larger files, or automate the backup process, use a backup program. Windows XP and Vista include backup programs, and 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 Backup

This section lists the important EndNote files to backup.

EndNote libraries

The library file 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 the .DATA folder found in the same folder as your library. This folder is considered part of the library; it includes figures 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 *Send to>Compressed Library* command.

To save to a compressed library file:

1. Open the library in EndNote.
2. From the *File* menu, select *Send to* and then *Compressed Library*.
3. 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

4. Back up the compressed filename.enlx file.

To restore a compressed library file:

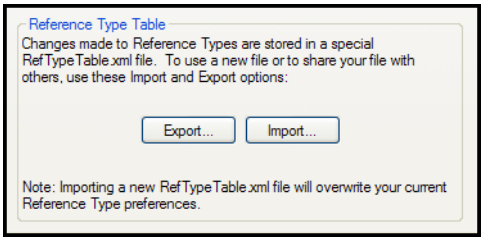
1. Use EndNote (version X or later) to open the filename.enlx file, which will extract the .ENL file and the .DATA folder to the same folder where the .ENLX file is located.
2. Use EndNote to open the filename.enl file as you normally would to use the library.

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 File

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. The default locations for these files are the Styles, Connections, and Filters folders in your EndNote X1 folder.

If you haven't modified these files, it is not as important to make backups of them because you can always reinstall them with the EndNote Installer.

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.

Appendix B
Troubleshooting

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Troubleshooting EndNote

For EndNote documentation updates and correction notes for this release, please refer to the Readme.txt file installed in the EndNote X1 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

Displaying Extended/ Special Characters

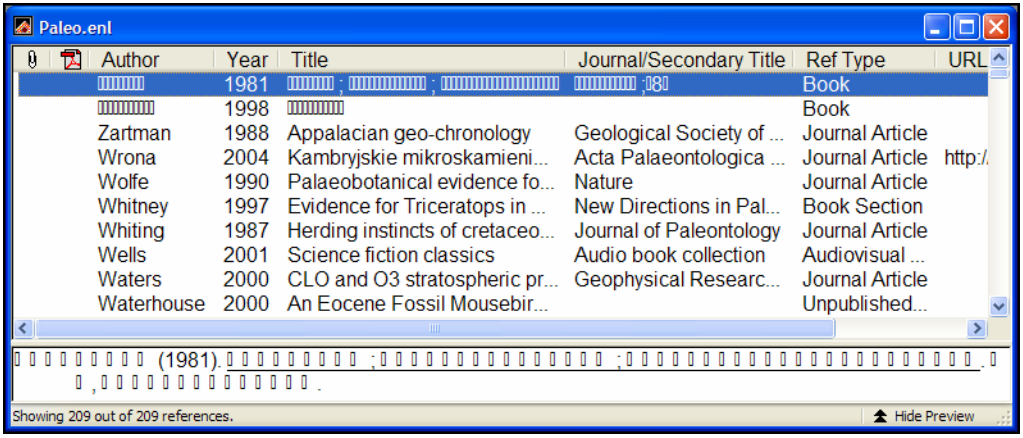
Importing Unicode Characters

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.

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. This example shows boxes rather than the appropriate Japanese characters.



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" on page 111.

Opening an EndNote X1 Library with EndNote 8 or 9

EndNote 8 and EndNote 9 libraries are compatible with EndNote X1. You can open an EndNote 9 library with EndNote X1, and you can also open an EndNote X1 library with EndNote 9.

However, because EndNote X1 includes enhancements, you may encounter one of the following situations when opening an EndNote X1 library with EndNote 8 or 9.

When I attempt to open an EndNote X1 library, EndNote crashes

When you received your copy of the EndNote X1 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 X1 library, including the .DATA folder associated with it.

When I open an EndNote X1 library, it appears to be empty

When you received your copy of the EndNote X1 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 X1 (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 X1 library, including the .DATA folder.

The Korean sort order is lost

EndNote X included a new 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 includes 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 included new reference types. EndNote 8 or 9 will display and print the Generic reference type for those references entered into the new EndNote reference types (Ancient Text, Dictionary, Encyclopedia, and Grant).

Existing File Links are not working

EndNote 8 and 9 do not support relative paths for attached files. When you use EndNote X1 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 for EndNote X1.

If EndNote X1 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 X1) and once with an absolute path (for EndNote 8 and 9).

1. First, use *File Attachments>Attach 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 attachment folder and create a relative link."
2. Use *File Attachments>Attach 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 attachment 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 X or X1. 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" on page 111 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. See "Recovering a Damaged Library" on page 111.

Cannot save a style, filter, or connection file

You have edited a content file (a style, filter, or connection file), but when you try to save the file you are told that you do not have permission to save to that folder.

If you do not have full administrative rights to your computer, there may be limits imposed on your ability to write to the Program Files folder. This affects files found in the default content file folders:

C:\Program Files\EndNote X1\Connections
C:\Program Files\EndNote X1\Filters
C:\Program Files\EndNote X1\Styles

You can resolve this using one of the methods described below.

Make changes to the file as an administrator:

1. Log off as the current user.
2. Log in again with administrative rights.
3. Make your edits and save the file while you have administrative rights.

Save the file to a folder to which you have write access, and then log in with administrative rights to copy it to the default folder:

1. Save the file to your "Shared" folder (Windows 2000 or XP) or "Public" folder (Windows Vista).
2. Log off as the current user.
3. Log in again with administrative rights.
4. Copy the modified file to the default folder in the EndNote X1 program folder.

Copy the content folders to a folder to which you have write access, and then modify EndNote Preferences to point to the new location:

1. With Windows Explorer, copy the entire folder that contains the file you are changing:

   C:\Program Files\EndNote X1\Connections
   C:\Program Files\EndNote X1\Filters
   C:\Program Files\EndNote X1\Styles

2. Paste the folder into your "My Documents" folder (Windows 2000 or XP) or "Documents" folder (Windows Vista).
3. In EndNote, go to the *Edit* menu and choose *Preferences*.
4. Under Folder Locations, click the appropriate *Select Folder* button to locate the new folder destination in your "My Documents" or "Documents" folder.
5. Modify the file and save it to the new location.

Remember that EndNote will only look in the folders designated under Preferences for Styles, Filters, and Connections.

Troubleshooting Cite While You Write

No EndNote commands in Word

When this manual was written, EndNote commands were available in Word 2000, XP, 2003, and 2007. In most versions of Word, EndNote commands appear on the *Tools* menu in an *EndNote X1* submenu. In Word 2007, EndNote commands appear on an EndNote tab.

If you upgraded your version of Word *after* installing EndNote, or Cite While You Write commands do not appear in Word for some other reason, you should run the EndNote Configure utility. From the *Start* menu, list *All Programs*, and go to the *EndNote* item to choose *Configure EndNote*. The utility will search your system for Microsoft Word and install Add-in support for Cite While You Write.

When word processor support is correctly installed, you will see EndNote commands on the *Tools>EndNote* submenu in Word, or, in Word 2007, on an EndNote tab.

Two EndNote toolbars appear in Word

When you have an earlier version of EndNote installed, and later install EndNote X1, 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.

   For example, in Word XP, you can look under *Tools>Templates and Add-ins*, see which EndNote add-in is located in the Startup folder, and view the path to the Startup folder. The Startup folder for an English system running Windows XP is typically "C:\Documents and Settings\<username>\Application Data\ Microsoft\Word\STARTUP"

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 I try to insert a large number of citations

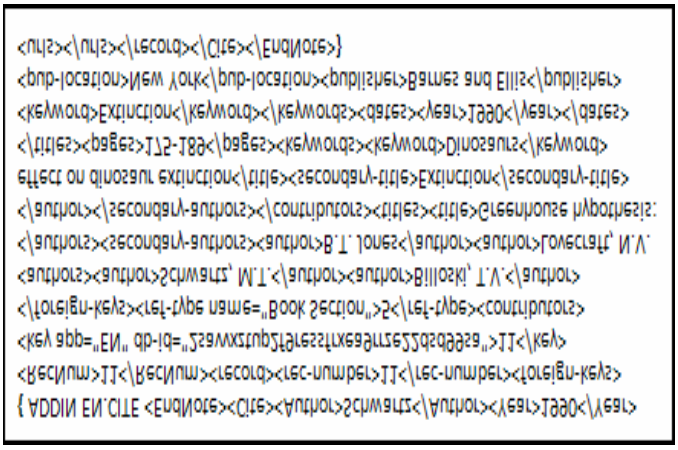
EndNote uses Word's hidden field codes when formatting citations, and inserts all the reference information for all of the grouped citations in these codes. However, there is a limit to the amount of text that Microsoft allows in a single set of field codes. You may reach the maximum limit when you attempt 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 50 citations in a single group.

Garbled ADDIN EN.CITE code is appearing 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 2000, XP, 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 2000, XP, and 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 the 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" 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. 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.
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 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. This section attempts to give you the understanding necessary to solve problems that arise with connections. If you do not find the information that you need here, please contact EndNote technical support.

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.

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'll see a time-out error message, and in the second case you'll see a "host refused connection" error message.

If you wait for two minutes and receive a time-out message, the remote 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 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 later in this section.

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 control panel.

Finding the Server Address and Port

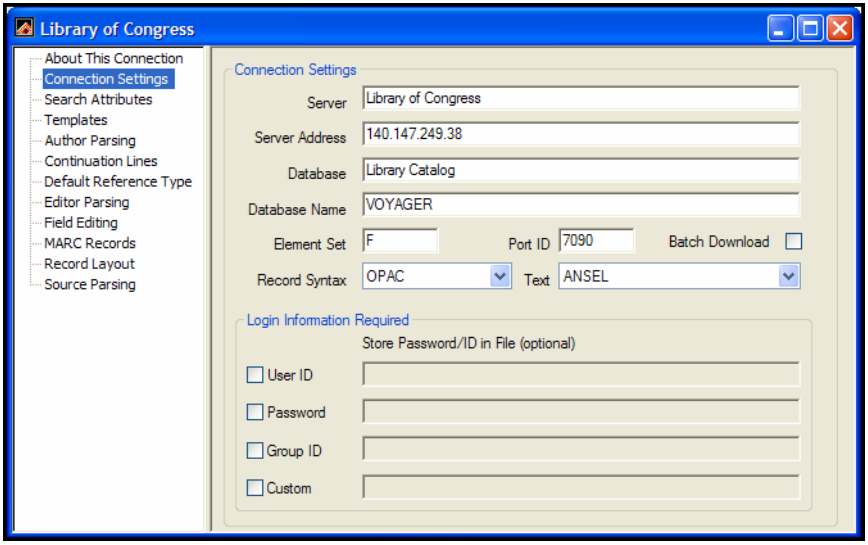
Before you contact your network administrator, check the appropriate EndNote connection file for the address of the remote server and the port specified.

To obtain the server address and port for an online database:

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.



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.”

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 a remote 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 that 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" on page 504, and deselect the Batch Download option described under "The Connection Settings" on page 506.

Problems With Retrieved Data

Blank Records

If blank records appear in your Retrieved References window, 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. See "Entering Special Characters" on page 148 for information about entering diacritics.

See "Importing Unicode Characters" on page 604 for information about importing Unicode characters correctly.

Appendix C
Reference Types and Fields

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Computer Program 627
Conference Paper 628
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Dictionary 629
Edited Book 629
Electronic Article 630
Electronic Book 630
Encyclopedia 631
Equation 631
Figure 632
Film or Broadcast 632
Generic 633
Government Document 633
Grant 633
Hearing 634
Journal Article 634
Legal Rule or Regulation 635

Magazine Article 635
Manuscript 636
Map 636
Newspaper Article 637
Online Database 637
Online Multimedia 638
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The EndNote Reference Types

The table presented on the following pages shows which fields are used in each of the 42 different reference types and what the fields are called. The reference types are presented in alphabetical order, although the Generic reference type is repeated several times so that you can easily compare an individual field to its Generic field name.

Descriptions of special fields, such as Authors, Pages, URL, and Figure start on page 389.

Important Points About Reference Types

- You can assign a particular reference type to each reference entered into your library.
- Reference type definitions, accessible through EndNote's Preferences, determine which fields are available for each of the different reference types.
- The Reference Types preference allows up to 42 different types of references, each capable of supporting up to 52 fields.
- Of the 42 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 author 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" on page 398.
- *Do not enter reference data into the Reference Types preference dialog*. These definitions are designed to store just the names of the reference fields.

Supplied Reference Types

Ancient Text	Government Document
Artwork	Grant
Audiovisual Material	Hearing
Bill	Journal Article
Book	Legal Rule or Regulation
Book Section	Magazine Article
Case	Manuscript
Chart or Table	Map
Classical Work	Newspaper Article
Computer Program	Online Database
Conference Paper	Online Multimedia
Conference Proceeding	Patent
Dictionary	Personal Communication
Edited Book	Report
Electronic Article	Statute
Electronic Book	Thesis
Encyclopedia	Unpublished Work
Equation	Web Page
Figure	Unused 1
Film or Broadcast	Unused 2
Generic	Unused 3

Generic	Ancient Text	Artwork
Author	Author	Artist
Year	Year	Year
Title	Title	Title
Secondary Author	Editor	
Secondary Title	Publication Title	
Place Published	City	City
Publisher	Publisher	Publisher
Volume	Volume	
Number of Volumes	Number of Volumes	
Number	Text Number	Size
Pages	Pages	Description
Section		
Tertiary Author		
Tertiary Title	Volume Title	
Edition	Edition	
Date	Date	Date
Type of Work	Type of Work	Type of Work
Subsidiary Author	Translator	
Short Title	Short Title	Short Title
Alternate Title	Abbreviated Publication	Alternate Title
ISBN/ISSN	ISBN	
DOI	DOI	DOI
Original Publication	Original Publication	
Reprint Edition	Reprint Edition	
Reviewed Item	Reviewed Item	
Custom 1		
Custom 2		
Custom 3		Size/Length
Custom 4		
Custom 5		
Custom 6		
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	Access Date
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Audiovisual Material	Bill
Author	Author	
Year	Year	Year
Title	Title	Title
Secondary Author	Series Editor	
Secondary Title	Series Title	Code
Place Published	City	
Publisher	Publisher	
Volume	Volume	Code Volume
Number of Volumes	Extent of Work	
Number	Number	Bill Number
Pages		Code Pages
Section		Code Section
Tertiary Author		
Tertiary Title		Legislative Body
Edition	Edition	Session
Date	Date	Date
Type of Work	Type	
Subsidiary Author	Performers	Sponsor
Short Title	Short Title	Short Title
Alternate Title	Alternate Title	
ISBN/ISSN	ISBN	
DOI	DOI	DOI
Original Publication	Contents	History
Reprint Edition		
Reviewed Item		
Custom 1	Cast	
Custom 2	Credits	
Custom 3	Size/Length	
Custom 4		
Custom 5	Format	
Custom 6		
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	Access Date
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Book	Book Section
Author	Author	Author
Year	Year	Year
Title	Title	Title
Secondary Author	Series Editor	Editor
Secondary Title	Series Title	Book Title
Place Published	City	City
Publisher	Publisher	Publisher
Volume	Volume	Volume
Number of Volumes	Number of Volumes	Number of Volumes
Number	Series Volume	Series Volume
Pages	Number of Pages	Pages
Section	Pages	Chapter
Tertiary Author		Series Editor
Tertiary Title		Series Title
Edition	Edition	Edition
Date	Date	
Type of Work	Type of Work	
Subsidiary Author	Translator	Translator
Short Title	Short Title	Short Title
Alternate Title	Abbreviation	Abbreviation
ISBN/ISSN	ISBN	ISBN
DOI	DOI	DOI
Original Publication	Original Publication	Original Publication
Reprint Edition	Reprint Edition	Reprint Edition
Reviewed Item		Reviewed Item
Custom 1		Section
Custom 2		
Custom 3		
Custom 4		
Custom 5		Packaging Method
Custom 6		
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	Access Date
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Case	Chart or Table
Author		Created By
Year	Year	Year
Title	Case Name	Title
Secondary Author		Name of File
Secondary Title	Reporter	Image Source Program
Place Published		City
Publisher	Court	Publisher
Volume	Reporter Volume	Image Size
Number of Volumes	Reporter Abbreviation	
Number		Number
Pages	First Page	Description
Section	Page Cited	
Tertiary Author	Higher Court	
Tertiary Title	Decision	
Edition	Action of Higher Court	Version
Date	Date Decided	Date
Type of Work	Citation of Reversal	Type of Image
Subsidiary Author	Counsel	
Short Title	Abbreviated Case Name	
Alternate Title		
ISBN/ISSN		
DOI	DOI	DOI
Original Publication	History	
Reprint Edition		
Reviewed Item		
Custom 1		
Custom 2		
Custom 3		
Custom 4		
Custom 5		
Custom 6		
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	Access Date
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Classical Work	Computer Program
Author	Attribution	Programmer
Year	Year	Year
Title	Title	Title
Secondary Author	Series Editor	Series Editor
Secondary Title	Series Title	Series Title
Place Published	City	City
Publisher	Publisher	Publisher
Volume	Volume	
Number of Volumes	Number of Volumes	
Number	Series Volume	
Pages	Number of Pages	Description
Section		
Tertiary Author		
Tertiary Title		
Edition	Edition	Version
Date		
Type of Work	Type	Type
Subsidiary Author	Translator	
Short Title	Short Title	Short Title
Alternate Title	Alternate Title	Alternate Title
ISBN/ISSN	ISSN/ISBN	ISBN
DOI	DOI	DOI
Original Publication	Original Publication	Contents
Reprint Edition	Reprint Edition	
Reviewed Item		
Custom 1		Computer
Custom 2		
Custom 3		
Custom 4		
Custom 5		
Custom 6		
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	Access Date
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Conference Paper	Conference Proceeding
Author	Author	Author
Year	Year	Year of Conference
Title	Title	Title
Secondary Author	Editor	Editor
Secondary Title	Conference Name	Conference Name
Place Published	Conference Location	Conference Location
Publisher	Publisher	Publisher
Volume	Volume	Volume
Number of Volumes		Number of Volumes
Number		
Pages	Pages	Pages
Section		
Tertiary Author		Series Editor
Tertiary Title		Series Title
Edition		Edition
Date	Date	Date
Type of Work	Type	
Subsidiary Author		Sponsor
Short Title		Short Title
Alternate Title		
ISBN/ISSN		ISBN
DOI	DOI	DOI
Original Publication		
Reprint Edition		
Reviewed Item		
Custom 1	Pub Place	Pub Place
Custom 2		Year Published
Custom 3		
Custom 4		
Custom 5		Packaging Method
Custom 6		
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number		Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	Access Date
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Dictionary	Edited Book
Author	Author	Editor
Year	Year	Year
Title	Title	Title
Secondary Author	Editor	Series Editor
Secondary Title	Dictionary Title	Series Title
Place Published	City	City
Publisher	Publisher	Publisher
Volume	Volume	Volume
Number of Volumes	Number of Volumes	Number of Volumes
Number	Number	Series Volume
Pages	Pages	Number of Pages
Section		
Tertiary Author		
Tertiary Title		
Edition	Edition	Edition
Date		Date
Type of Work		Type of Work
Subsidiary Author	Translator	Translator
Short Title	Short Title	Short Title
Alternate Title	Abbreviation	Alternate Title
ISBN/ISSN	ISBN	ISBN
DOI	DOI	DOI
Original Publication	Original Publication	Original Publication
Reprint Edition	Reprint Edition	Reprint Edition
Reviewed Item	Reviewed Item	
Custom 1		
Custom 2		
Custom 3		
Custom 4		
Custom 5		
Custom 6		
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Editor Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	Access Date
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Electronic Article	Electronic Book
Author	Author	Author
Year	Year	Year
Title	Title	Title
Secondary Author		Editor
Secondary Title	Periodical Title	Secondary Title
Place Published	City	City
Publisher	Publisher	Publisher
Volume	Volume	Volume
Number of Volumes		
Number	Issue	
Pages	Pages	Number of Screens
Section		
Tertiary Author		
Tertiary Title		
Edition	Edition	Edition
Date	Date Accessed	Date Accessed
Type of Work	Type of Work	Type of Medium
Subsidiary Author		
Short Title		
Alternate Title	Alternate Title	
ISBN/ISSN	ISSN	ISBN
DOI	DOI	DOI
Original Publication		
Reprint Edition		
Reviewed Item		
Custom 1	Year Cited	Year Cited
Custom 2	Date Cited	Date Cited
Custom 3		
Custom 4		
Custom 5		
Custom 6		
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number		
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date		
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Encyclopedia	Equation
Author	Author	Created By
Year	Year	Year
Title	Title	Title
Secondary Author	Editor	Name of File
Secondary Title	Encyclopedia Title	Image Source Program
Place Published	City	City
Publisher	Publisher	Publisher
Volume	Volume	Image Size
Number of Volumes	Number of Volumes	
Number		Number
Pages	Pages	Description
Section		
Tertiary Author		
Tertiary Title		
Edition	Edition	Version
Date	Date	Date
Type of Work		Type of Image
Subsidiary Author	Translator	
Short Title	Short Title	
Alternate Title	Abbreviation	
ISBN/ISSN	ISBN	
DOI	DOI	DOI
Original Publication	Original Publication	
Reprint Edition	Reprint Edition	
Reviewed Item	Reviewed Item	
Custom 1		
Custom 2		
Custom 3		
Custom 4		
Custom 5		
Custom 6		
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	Access Date
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Figure	Film or Broadcast
Author	Created By	Director
Year	Year	Year Released
Title	Title	Title
Secondary Author	Name of File	Series Director
Secondary Title	Image Source Program	Series Title
Place Published	City	Country
Publisher	Publisher	Distributor
Volume	Image Size	
Number of Volumes		
Number	Number	
Pages	Description	Running Time
Section		
Tertiary Author		Producer
Tertiary Title		Series Title
Edition	Version	Edition
Date	Date	Date Released
Type of Work	Type of Image	Medium
Subsidiary Author		Performers
Short Title		Short Title
Alternate Title		Alternate Title
ISBN/ISSN		
DOI	DOI	DOI
Original Publication		
Reprint Edition		
Reviewed Item		
Custom 1		Cast
Custom 2		Credits
Custom 3		
Custom 4		Genre
Custom 5		Format
Custom 6		
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Synopsis
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	Access Date
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Government Document	Grant
Author	Author	Investigators
Year	Year	Year
Title	Title	Title of Grant
Secondary Author	Department	
Secondary Title		
Place Published	City	Activity Location
Publisher	Publisher	Sponsoring Agency
Volume	Volume	Amount Requested
Number of Volumes		Amount Received
Number	Issue	Status
Pages	Pages	Pages
Section	Section	Duration of Grant
Tertiary Author		
Tertiary Title	Series Title	
Edition	Edition	Requirements
Date		Deadline
Type of Work		Funding Type
Subsidiary Author		Translator
Short Title		Short Title
Alternate Title		Abbreviation
ISBN/ISSN	Report Number	
DOI	DOI	DOI
Original Publication		Original Grant Number
Reprint Edition		Review Date
Reviewed Item		Reviewed Item
Custom 1	Government Body	Contact Name
Custom 2	Congress Number	Contact Address
Custom 3	Congress Session	Contact Phone
Custom 4		Contact Fax
Custom 5		Funding Number
Custom 6		CFDA Number
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number		Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	Access Date
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Hearing	Journal Article
Author		Author
Year	Year	Year
Title	Title	Title
Secondary Author		
Secondary Title	Committee	Journal
Place Published	City	
Publisher	Publisher	
Volume		Volume
Number of Volumes	Number of Volumes	
Number	Document Number	Issue
Pages	Pages	Pages
Section		Start Page
Tertiary Author		
Tertiary Title	Legislative Body	
Edition	Session	Epub Date
Date	Date	Date
Type of Work		Type of Article
Subsidiary Author		
Short Title	Short Title	Short Title
Alternate Title		Alternate Journal
ISBN/ISSN		ISSN
DOI	DOI	DOI
Original Publication	History	Original Publication
Reprint Edition		Reprint Edition
Reviewed Item		Reviewed Item
Custom 1		Legal Note
Custom 2		
Custom 3		
Custom 4		
Custom 5		
Custom 6		
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	Access Date
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Legal Rule or Regulation	Magazine Article
Author	Author	Author
Year	Year	Year
Title	Title	Title
Secondary Author	Issuing Organization	
Secondary Title		Magazine
Place Published	Place Published	Place Published
Publisher	Publisher	Publisher
Volume	Rule Number	Volume
Number of Volumes	Session Number	Frequency
Number	Start Page	Issue Number
Pages	Pages	Pages
Section	Section Number	Start Page
Tertiary Author		
Tertiary Title	Supplement No.	
Edition	Edition	Edition
Date	Date of Code Edition	Date
Type of Work	Type of Work	Type of Article
Subsidiary Author		
Short Title		Short Title
Alternate Title	Abbreviation	Alternate Magazine
ISBN/ISSN	Document Number	ISSN
DOI	DOI	DOI
Original Publication		Original Publication
Reprint Edition		Reprint Edition
Reviewed Item		Reviewed Item
Custom 1		
Custom 2		
Custom 3		
Custom 4		
Custom 5		
Custom 6		
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	Access Date
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Manuscript	Map
Author	Author	Cartographer
Year	Year	Year
Title	Title	Title
Secondary Author		Series Editor
Secondary Title	Collection Title	Series Title
Place Published	City	City
Publisher	Library/Archive	Publisher
Volume	Volume/Storage Container	
Number of Volumes	Manuscript Number	
Number	Folio Number	
Pages	Pages	Description
Section	Start Page	
Tertiary Author		
Tertiary Title		
Edition		Edition
Date	Date	Date
Type of Work	Type of Work	Type
Subsidiary Author		
Short Title	Short Title	Short Title
Alternate Title	Abbreviation	Alternate Title
ISBN/ISSN		ISBN
DOI	DOI	DOI
Original Publication		
Reprint Edition		
Reviewed Item		
Custom 1		Scale
Custom 2		Area
Custom 3		Size
Custom 4		
Custom 5		Packaging Method
Custom 6		
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	Access Date
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Newspaper Article	Online Database
Author	Reporter	Author
Year	Year	Year
Title	Title	Title
Secondary Author		
Secondary Title	Newspaper	Periodical
Place Published	City	
Publisher	Publisher	Publisher
Volume	Volume	Volume
Number of Volumes	Frequency	
Number	Start Page	
Pages	Pages	Pages
Section	Section	
Tertiary Author		
Tertiary Title		
Edition	Edition	Date Published
Date	Issue Date	Date Accessed
Type of Work	Type of Article	Type of Work
Subsidiary Author		
Short Title	Short Title	
Alternate Title		
ISBN/ISSN	ISSN	Report Number
DOI	DOI	DOI
Original Publication	Original Publication	
Reprint Edition	Reprint Edition	
Reviewed Item	Reviewed Item	
Custom 1	Column	
Custom 2		
Custom 3		
Custom 4		
Custom 5		
Custom 6		
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number	Call Number	
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Online Multimedia	Patent
Author	Created By	Inventor
Year	Year	Year
Title	Title	Title
Secondary Author	Series Editor	Issuing Organization
Secondary Title	Series Title	Published Source
Place Published		Country
Publisher	Distributor	Assignee
Volume		Patent Version Number
Number of Volumes		
Number	Number of Screens	Application Number
Pages		Pages
Section		International Patent Number
Tertiary Author		International Title
Tertiary Title		International Author
Edition		International Patent Classification
Date	Date Accessed	Date
Type of Work	Type of Work	Patent Type
Subsidiary Author		
Short Title		Short Title
Alternate Title		
ISBN/ISSN		Patent Number
DOI	DOI	DOI
Original Publication		Priority Numbers
Reprint Edition		
Reviewed Item		
Custom 1	Year Cited	
Custom 2	Date Cited	Issue Date
Custom 3		Designated States
Custom 4		Attorney/Agent
Custom 5	Format/Length	References
Custom 6		Legal Status
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number		Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Inventor Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date		Access Date
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Personal Communication	Report
Author	Author	Author
Year	Year	Year
Title	Title	Title
Secondary Author	Recipient	Series Editor
Secondary Title		Series Title
Place Published	City	City
Publisher	Publisher	Institution
Volume		Volume
Number of Volumes	Communication Number	Series Volume
Number	Folio Number	Document Number
Pages	Pages	Pages
Section		
Tertiary Author		Publisher
Tertiary Title		
Edition	Description	Edition
Date	Date	Date
Type of Work	Type	Type
Subsidiary Author		Department/Division
Short Title	Short Title	Short Title
Alternate Title	Abbreviation	Alternate Title
ISBN/ISSN		Report Number
DOI	DOI	DOI
Original Publication		Contents
Reprint Edition		
Reviewed Item		
Custom 1		
Custom 2		
Custom 3		
Custom 4		
Custom 5		
Custom 6		
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	Access Date
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Statute	Thesis
Author		Author
Year	Year	Year
Title	Name of Act	Title
Secondary Author		
Secondary Title	Code	Academic Department
Place Published	Country	City
Publisher	Source	University
Volume	Code Number	Degree
Number of Volumes	Statute Number	
Number	Public Law Number	
Pages	Pages	Number of Pages
Section	Sections	
Tertiary Author		Advisor
Tertiary Title	International Source	
Edition	Session	
Date	Date Enacted	Date
Type of Work		Thesis Type
Subsidiary Author		
Short Title	Short Title	Short Title
Alternate Title	Abbreviation	
ISBN/ISSN		
DOI	DOI	DOI
Original Publication	History	
Reprint Edition		
Reviewed Item	Article Number	
Custom 1		
Custom 2		
Custom 3		
Custom 4		
Custom 5		
Custom 6		
Custom 7		
Accession Number	Accession Number	Accession Number
Call Number	Call Number	Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	Access Date
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Unpublished Work	Web Page
Author	Author	Author
Year	Year	Year
Title	Title of Work	Title
Secondary Author		Series Editor
Secondary Title	Series Title	Series Title
Place Published	City	City
Publisher	Institution	Publisher
Volume		Access Year
Number of Volumes		
Number	Number	Access Date
Pages	Pages	Description
Section		
Tertiary Author		
Tertiary Title		
Edition		Edition
Date	Date	Last Update Date
Type of Work	Type of Work	Type of Medium
Subsidiary Author		
Short Title	Short Title	Short Title
Alternate Title	Abbreviation	Alternate Title
ISBN/ISSN		ISBN
DOI	DOI	DOI
Original Publication		Contents
Reprint Edition		
Reviewed Item		
Custom 1		Year Cited
Custom 2		Date Cited
Custom 3		
Custom 4		
Custom 5		
Custom 6		
Custom 7		
Accession Number		Accession Number
Call Number		Call Number
Label	Label	Label
Keywords	Keywords	Keywords
Abstract	Abstract	Abstract
Notes	Notes	Notes
Research Notes	Research Notes	Research Notes
URL	URL	URL
File Attachments	File Attachments	File Attachments
Author Address	Author Address	Author Address
Figure	Figure	Figure
Caption	Caption	Caption
Access Date	Access Date	
Last Modified Date	Last Modified Date	Last Modified Date
Translated Author	Translated Author	Translated Author
Translated Title	Translated Title	Translated Title
Name of Database	Name of Database	Name of Database
Database Provider	Database Provider	Database Provider
Language	Language	Language

Generic	Unused 1	Unused 2
Author		
Year		
Title		
Secondary Author		
Secondary Title		
Place Published		
Publisher		
Volume		
Number of Volumes		
Number		
Pages		
Section		
Tertiary Author		
Tertiary Title		
Edition		
Date		
Type of Work		
Subsidiary Author		
Short Title		
Alternate Title		
ISBN/ISSN		
DOI		
Original Publication		
Reprint Edition		
Reviewed Item		
Custom 1		
Custom 2		
Custom 3		
Custom 4		
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Custom 6		
Custom 7		
Accession Number		
Call Number		
Label		
Keywords		
Abstract		
Notes		
Research Notes		
URL		
File Attachments		
Author Address		
Figure		
Caption		
Access Date		
Last Modified Date		
Translated Author		
Translated Title		
Name of Database		
Database Provider		
Language		

Generic	Unused 3
Author	
Year	
Title	
Secondary Author	
Secondary Title	
Place Published	
Publisher	
Volume	
Number of Volumes	
Number	
Pages	
Section	
Tertiary Author	
Tertiary Title	
Edition	
Date	
Type of Work	
Subsidiary Author	
Short Title	
Alternate Title	
ISBN/ISSN	
DOI	
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Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Accession Number	
Call Number	
Label	
Keywords	
Abstract	
Notes	
Research Notes	
URL	
File Attachments	
Author Address	
Figure	
Caption	
Access Date	
Last Modified Date	
Translated Author	
Translated Title	
Name of Database	
Database Provider	
Language	

Appendix D

Direct Export Formats and Import Formats

Contents

About Direct Export and Import Formats 646

Direct Export Formats 647

Output Formats with Corresponding Import Options 656

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.

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.

You also have another option for copying references into your EndNote libraries. See Chapter 6, "Searching Online Databases with EndNote" 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, 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 Formats

Many information provider websites 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.

The systems listed below provide a direct export of references into EndNote. At the time this manual was printed, 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!

Information Provider	Type of Data/Access	How to Direct Export
ALEPH	Various library websites	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	
Bibliotek.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.

Information Provider	Type of Data/Access	How to Direct Export
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.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.

Information Provider	Type of Data/Access	How to Direct Export
CCLR	Reference Sight Database provided by the University of Waterloo Centre for Contact Lens Research (formerly Bausch & Lomb Vision Science Reference Database) http://www.referencesight.com Free subscription	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 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	

Information Provider	Type of Data/Access	How to Direct Export
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 records*. 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 http://scholar.google.com/ Free access	First, set your preferences: 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.

Information Provider	Type of Data/Access	How to Direct Export
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	

Information Provider	Type of Data/Access	How to Direct Export
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*.

Information Provider	Type of Data/Access	How to Direct Export
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/ Internal use only	1. Do your search. 2. Mark your records. 3. Go to the Output tab. 4. Select *Citations and Abstracts* as the 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*.

Information Provider	Type of Data/Access	How to Direct Export
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.

Information Provider	Type of Data/Access	How to Direct Export
Thieme	Journal publications http://www.thieme-connect.com/ejournals/home.html Subscription required	Click *Export to Bibliographic Database*.
Web of Science	Thomson Scientific 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.

Chapter 7, "Importing Reference Data into EndNote" includes more detailed information about importing. See "General Importing Instructions" on page 193 for step-by-step instructions.

Chapter 16, "Filters" includes 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 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.

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 resulting text file contains tags which are preceded by 18 spaces.	Ageline (AARP) filter

Information Provider	Recommended Download Format	Import Option
ACM Digital Library (Association for Computing Machinery)	Users with subscription access to this website 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 Record 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.

Information Provider	Recommended Download Format	Import Option
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 will need to manually edit author names.	Various EDINA filters are available in the EndNote Filters folder.
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

Information Provider	Recommended Download Format	Import Option
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." 5. 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.
Library of Congress	Save references in the Tagged Format as a plain text (*.txt) file.	OPAC (LoC) filter
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	1. After selecting the references you wish to download, click *Results Manager*. 2. Choose the following options: Fields: Complete Reference Citation Format: Reprint/Medlars (or Direct Export, if available) 3. Click the *Email* or *Save* button. 4. Save the file as plain text (*.txt).	The appropriate Ovid filter will be selected automatically when using the *Direct Export* option. If you are using Ovid's multiple database searching, you must select the *Direct Export* citation format.

Information Provider	Recommended Download Format	Import Option
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 at 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 as plain text (*.txt).	Use the PsycINFO (APA) filter.
PubMed	1. From the drop-down menu next to the *Display* button, choose *MEDLINE*. 2. From the "Send to" menu, choose *File* and save the file as a plain text file (*.txt). You can check current download instructions for NLM PubMed at any time at http://www.pubmed.gov. Note that the PMID will transfer to the Accession Number field in EndNote.	PubMed (NLM) filter
SilverPlatter WebSPIRS	1. Once you've obtained your search results, click *Save*. 2. Select the following "Save Records" options: Which fields?: All fields Include: Record number and database name Field labels: Short labels. 3. Click the *Save Records* button. 4. 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)

Information Provider	Recommended Download Format	Import Option
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.
Web of Knowledge Web of Science	Display your marked references. Then, look under Output Records and select the option to output *Full Records*. Next, click *Export to Reference Software* to have the references exported directly to EndNote. (See "Direct Export Formats" on page 647.) You may also choose *Save to File* to save the references to a text file and import them into EndNote.	ISI-CE filter
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

Appendix E
Keyboard Commands

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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 *Delete References* 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

References Menu Command	Key Command
New Reference	CTRL+N
Edit References	CTRL+E
Delete References	CTRL+D
Search References	CTRL+F
Go To	CTRL+J
Next Reference	CTRL+PAGE DOWN
Previous Reference	CTRL+PAGE UP
Show All References	CTRL+M
File Attachments > Open File	CTRL+ALT+P
URL > Open URL	CTRL+G

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

Tools Menu Command	Key Command
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
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 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 reference(s)	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 text is selected:	
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 cursor	CTRL+V
select all text in a field	CTRL+A
set the text style to Plain	CTRL+T
select the Plain font	CTRL+L
turn bold on and off	CTRL+B
turn italic on and off	CTRL+I
turn underline on and off	CTRL+U

Use the ARROW keys to navigate within a field.

CWYW Keyboard Commands

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" on page 544.

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 2000, XP, and 2003	
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

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Boolean Operator
A Boolean operator is one of the connecting terms AND, OR, or NOT, used to combine search lines. A matching reference must meet both of the conditions connected by the AND, so AND narrows the search compared to using either search line 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 line following it.

Cite While You Write
Cite While You Write software is installed with the EndNote program for use with Microsoft Word 2000, XP, 2003, and 2007. It integrates an *EndNote X1* submenu of commands into the *Tools* menu in Word for quick and easy insertion and formatting of citations, bibliographies, figures, and tables. Instant formatting and a traveling library that contains full reference information make Cite While You Write 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 X1 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>New 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. For example, the continuation lines below are indented four spaces from the left margin.

```
AB- A single-subject research design that used multiple baselines
    across behaviors compared traditional adaptations to adapted
    computer technologies.
```

Data File
A data file consists of the records captured or saved from a reference database, whether from an online database or from a CD-ROM. 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 Display 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 Display Font is the font used to display references in the Library window. Both display fonts may be changed using EndNote's preferences.

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.

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 your formatted citations in Word. These hidden codes contain reference information, and allow EndNote to format, unformat, and reformat citations within Word.

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 X1 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.

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 preference (see page 399).

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 two temporary groups: Search Results, which displays references found during the most recent search; and Transferred References, which displays the most recent batch of references transferred in from EndNote Web. Custom groups can include the results of a search, but you can also build a set by highlighting individual records and adding them to a group. You can save up to 50 custom groups in your library. 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.

Information Provider
An information provider is a service that provides access to one or more databases, whether to an online or CD-ROM database. Examples of information providers include Ovid, Thomson Scientific, SilverPlatter, and STN.

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.

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.

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 *Online Search* command to search and retrieve references from online databases, EndNote maintains a log file to record communication status messages with the online 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.

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.

Online Database
An online database is the term used for remote databases available online using EndNote's *Online Search* 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**.

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 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.

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.

Retrieved References Window
The Retrieved References window appears when a connection to an **online database** is established. This workspace displays the connection status as well as the references retrieved from your searches. Use this workspace to store retrieved references as you continue searching the online database. When your searching is complete, copy the references from the Retrieved References window to the Library window to save them.

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.

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.

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.

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 provides more than 2,800 preconfigured styles in the Styles folder of your EndNote X1 folder. To preview and browse through these styles, choose *Output Styles* from the *Edit* menu, and select *Open Style Manager*. Styles are used to determine the format of references in the preview pane 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**.

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.

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 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.

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.

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 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.

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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