



THOMSON REUTERS

# ENDNOTE®

Advance your Research and Publish Instantly



Getting Started Guide

View online tutorials at  
[www.endnote.com/training](http://www.endnote.com/training)

# EndNote®

## Version X5 for Windows

### **Copyright © 2011 Thomson Reuters**

All rights reserved worldwide. No part of this publication may be reproduced, transmitted, transcribed, stored in a retrieval system, or translated into any language in any form by any means, without written permission from Thomson Reuters.

### **Trademark Information:**

EndNote is a registered trademark of Thomson Reuters. Cite While You Write is a trademark of Thomson Reuters. Microsoft, Windows, and ActiveSync are registered trademarks of Microsoft Corporation. OpenOffice.org is a trademark of OpenOffice.org. All other product and service names cited in this manual may be trademarks or service marks of their respective companies.

PDF technology in EndNote is powered by PDFNet SDK copyright © PDFTron™ Systems Inc., 2001-2011, and distributed by Thomson Reuters under license. All rights reserved.

### **NOTICE REGARDING LEGAL USE OF DOWNLOADED REFERENCE DATA**

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

# Contents

<b>Introduction Welcome to Thomson Reuters EndNote X5</b> . . . . .	<b>5</b>
<b>Chapter 1 Windows EndNote Installation</b> . . . . .	<b>11</b>
<b>Chapter 2 Introduction to an EndNote Library</b> . . . . .	<b>27</b>
Start EndNote, open a reference library, sort the library, select, open, and close a reference, and save references to a custom group.	
<b>Chapter 3 Setting EndNote Preferences</b> . . . . .	<b>41</b>
Learn how to access EndNote preferences, how to set a default library to open automatically, and how to change the display fonts.	
<b>Chapter 4 Entering a Reference</b> . . . . .	<b>45</b>
Manually insert a reference, and attach a file to the reference.	
<b>Chapter 5 Searching an Online Database</b> . . . . .	<b>51</b>
Use EndNote to search online databases and library catalogs. This feature requires that you have an Internet connection.	
<b>Chapter 6 Importing Reference Data into EndNote</b> . . . . .	<b>63</b>
Import a tagged text file of references downloaded from an online database.	
<b>Chapter 7 Searching an EndNote Library and Saving it as a Smart Group</b> . . . . .	<b>79</b>
Search for references, and create a smart group with the search strategy.	
<b>Chapter 8 Using EndNote While Writing a Paper with Microsoft Word</b> . . . . .	<b>85</b>
Insert bibliographic citations in Microsoft Word, and have EndNote generate a bibliography for the paper.	
<b>Index</b> . . . . .	<b>93</b>

## About this Guide

This guide provides a basic overview of installing and using EndNote. It assumes that you know how to use your word processor and the Windows operating system. For help on these topics, consult your computer guide or your word processor manual.

For additional information about using EndNote, consult EndNote Help. From EndNote's Help menu, select Contents to view help topics. While using EndNote, press F1 to view a help topic about the current window.



# Introduction: Welcome to Thomson Reuters EndNote X5

## EndNote—your complete reference solution!

- ◆ EndNote is an online search tool—you can search online bibliographic resources and retrieve references directly into your EndNote library. You can also export references to EndNote from your favorite online resource (see “Direct Export Providers” in EndNote Help).
- ◆ EndNote is a reference and full text organizer with a collaborative Web tool—your personal reference library will save you countless hours of organizing your research. Group references according to your research projects and attach up to 45 files per record for managing related materials. EndNote can locate full text PDF files for you or create a reference when importing a PDF file. Transfer references and now file attachments to your EndNote Web account to share groups with other EndNote users easily and manage your ResearcherID publication list.
- ◆ EndNote is a bibliography maker—Cite While You Write™ takes the pain out of citing and formatting references in Apple Pages ‘09, Microsoft® Word, and OpenOffice.org Writer 3 for Windows. You can also create bibliographies for other word processors using Format Paper (RTF files). There is simply no better tool than EndNote for handling diverse bibliographic style requirements.

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

See “What’s New in EndNote X5” on page 9 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 the Demonstration Version of EndNote and the EndNote Viewer

If you are working with the EndNote demonstration version, you have 30 days after you first use the program to evaluate EndNote

and all of its features. After those 30 days, the demonstration version reverts to a feature-restricted EndNote Viewer.

---

**NOTE:** While you can see the entire list of Microsoft Word templates available with the full version of EndNote, the demonstration version includes only the Nature manuscript template specifications. Any of the manuscript templates you choose will launch the Nature manuscript template.

---

After the program reverts to an EndNote Viewer, you can still open EndNote libraries, search, sort, and print references.

With the EndNote Viewer you **will not** be able to:

- ◆ Add or edit references in a library that has 10 or more references already in it.
- ◆ Format more than 10 citations in a paper.
- ◆ Retrieve more than 10 references from a remote database.
- ◆ Import more than 10 references.
- ◆ Export more than 10 references at one time.

To purchase an unrestricted version of the EndNote program, open your trial version, and then click the Yes button when the EndNote dialog appears with the message:

“Would you like to activate the full version of EndNote?”

You will need to purchase a product key in order to activate the unrestricted version of EndNote.

If you are upgrading from a previous version of EndNote, then you need to supply the product key and provide your name in the Name field.

## About this Getting Started Guide

This guide provides a basic overview of installing and using EndNote. It is not a complete user's guide, but rather is intended as a guided tour to show you the highlights of the EndNote program.

This guide assumes that you know how to use your Windows operating system and your word processor. 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.

The following representations for key combinations are used:

<b><u>Instruction</u></b>	<b><u>Explanation</u></b>
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.

## Customer Services

---

### Register Your Copy of EndNote

You can register your software by either 1) creating or upgrading your EndNote Web account the first time that you start EndNote X5, or 2) by going to <http://www.endnote.com/register>.

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

---

**NOTE:** Even if you purchased EndNote directly from Thomson Reuters, do not assume that you are registered.

---

---

### EndNote Online Help

**Online Help:** From EndNote's Help menu, select Contents to view the various topics. For context-sensitive help, click the Help or ? button found on various windows and dialogs, or press the F1 key on your keyboard.

**The EndNote Manual:** The online Help file is made available as a printable PDF file and is available from the "Overview of Thomson Reuters EndNote" topic in EndNote Help.

**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, go to <http://www.endnote.com/support>.

---

## 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:** 1 800 722 1227 (Toll Free)

**Phone:** 760 438 5526 (country code is 01)

**Fax:** 760 438 5573 (country code is 01)

**Web/Email:** <http://www.endnote.com/contact>

### Customer Support (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/contact>

---

## Support

Contact Technical Support 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 Windows operating system, EndNote, and word processor. To find the EndNote version and serial number, start EndNote and select About EndNote from the Help menu.

**For web/e-mail or phone contact, including hours and holiday closures, please go to:**

<http://www.endnote.com/contact>

Technical support tips are also available from the <http://science.thomsonreuters.com/techsupport/hours/> site and the EndNote Discussion Forum (see the sections that follow in this manual).

---

## International Customer and Technical Support

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

Go to <http://www.endnote.com/distributors> to find contact information for your local EndNote support.

---

## Online Support

### EndNote Web Site

The EndNote Web site (<http://www.endnote.com>) contains free training options including online videos and Web classes, a



technical support knowledge base, and information on the latest versions of EndNote. You can also find updated styles, filters, and connection files available for download.

### **EndNote Discussion Forums**

If you wish to join an ongoing forum of EndNote users like yourself, go to <http://www.endnote.com/forum>. You can browse several EndNote message lists, easily search for topics, and join to add messages.

Join the EndNote social network at:

- ◆ [www.facebook.com/EndNote](http://www.facebook.com/EndNote)
- ◆ [www.twitter.com/EndNoteNews](http://www.twitter.com/EndNoteNews)
- ◆ [www.youtube.com/endnotetraining](http://www.youtube.com/endnotetraining)

---

## **ADA VPAT**

Thomson Reuters 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.

Visit our Web site at <http://www.endnote.com/vpat> 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 X5**

The current release of EndNote includes the following new features:

- ◆ Add and transfer file attachments to references in your EndNote Web account for greater mobility. Upgrade or create your Web account with your EndNote X5 license to receive this expanded feature.
- ◆ View and annotate PDF files in the EndNote library new PDF & Quick Edit tab.
- ◆ Find Reference Updates on the Record Edit window to retrieve additional online data such as the PMCID required for NIH grants.

- ◆ Select a new citation option – Author (Year) – within the Find & Insert My References dialog in Cite While You Write.
- ◆ Save time with new conditional formatting – substitute empty fields with alternates such as “Volume and Pages” with DOI. Support includes DOI, PMCID, and Editor/Translator conditions.
- ◆ Review duplicate references quickly with new auto-highlights for each field where differences are found.
- ◆ View new Dataset and Music reference types as well as new fields for NIHMSID and Article Number.
- ◆ Select from an expanded set of bibliographic styles, import filters, and connection files installed by default – or add more through customizing.

---

**NOTE:** Thomson Reuters recommends that you view our What's New video at [www.endnote.com/training](http://www.endnote.com/training) or on your EndNote X5 CD.

---

# Chapter 1: Windows EndNote Installation

## Before You Install EndNote

If you are installing the full version of EndNote (not the Demo version), 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 product key or serial number.

---

### Program Requirements

Both the full EndNote program and the EndNote Demo are available on CD or by downloading. If you have a CD you need a CD-ROM drive to install the program.

#### System Requirements:

EndNote runs under the following operating systems:

- ◆ Windows 7 (32 or 64 bit versions)
- ◆ Windows Vista (32 or 64 bit versions)
- ◆ Windows XP with at least Service Pack 3 installed

#### Hardware Requirements:

- ◆ A minimum of 256 MB of available RAM
- ◆ A hard drive with at least 400 MB of free space
- ◆ An Internet connection is required to access online databases using the EndNote Online Search feature, to run the Find Full Text feature, and to transfer references to and from EndNote Web. You will also need a Web browser to use the OpenURL Link and Open URL commands.
- ◆ Unicode compliant

---

**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 Reuters directly. You must do so within 30 days of purchase.

---

---

**NOTE:** For Windows, check [www.endnote.com/enwin.asp](http://www.endnote.com/enwin.asp) for the latest compatibility requirements.

---

---

## Word Processor Compatibility

As of June 2011, EndNote for Windows is compatible with:

- ◆ Microsoft Office Word 2003, 2007, or 2010 (32 or 64 bit versions) for Windows
- ◆ Open Document Format (ODT) documents created with OpenOffice.org Writer 3
- ◆ RTF files created with most word processors, including: Microsoft Word, WordPerfect, OpenOffice.org Writer, StarOffice, and WordPad
- ◆ Wolfram Mathematica 8

### Microsoft Word

EndNote installs Cite While You Write commands in Microsoft Word.

- ◆ Word 2003 displays an EndNote submenu of commands on Word's Tools menu.
- ◆ Word 2007 and 2010 displays Cite While You Write commands on an EndNote tab.

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 document—without exiting your word processor.

In order for Cite While You Write to install properly, Microsoft Word 2003, 2007, and 2010 must be correctly installed on your computer prior to installing EndNote. Please make sure that you close Word and all applications before attempting to install Cite While You Write.

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.

### OpenOffice.org Writer

EndNote installs Cite While You Write commands in the OpenOffice.org version 3 Writer. CWYW commands appear on an EndNote menu. Cite While You Write allows EndNote to format citations and create a bibliography for the document that is open in OpenOffice.org Writer. You can format, unformat, and reformat a document—without exiting your word processor.

In order for Cite While You Write to install properly, the OpenOffice.org 3.x suite must be correctly installed on your computer *prior to* installing EndNote.

You must close all OpenOffice.org applications before installing Cite While You Write, including the OpenOffice.org Quickstarter.

### **RTF and ODT Documents**

For word processors other than Word 2003, Word 2007, Word 2010, or OpenOffice.org 3.x, first write your paper and insert in-text citations. If the file format is anything other than an OpenOffice.org ODT document, save as an RTF file. Then, use EndNote's Format Paper feature to format the citations and bibliography from your ODT or RTF file.

## **EndNote Installation**

Follow these instructions to install the EndNote program.

If you are upgrading from a previous version of EndNote, please see "Upgrading from an Earlier EndNote Version" on page 19.

See "Networks and Volume Installations" in EndNote Help for information about using EndNote in a network environment, licensing, and performing mass installations.

---

## **Installing EndNote**

### **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, Microsoft Word, or any OpenOffice.org applications.

The OpenOffice.org Quickstarter may appear in your System tray. Right-click on the icon, and then select Exit Quickstarter.

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 CD into your CD-ROM drive.

The EndNote Setup program will start. If you do not have Autoplay enabled, select Run from the Start menu, type "d:\setup" (use the drive letter appropriate to the drive containing the installation CD), and then press Enter.

3. Follow the instructions on screen to complete the installation. Use the Next button to move forward between the installation dialogs.

**Welcome:** Thank you for selecting 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 X5 CD packaging or on the order confirmation of your digital product.

If you are installing the Demo version, select 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.

If you are upgrading from a previous version, you must also enter your previous EndNote product key or serial number.

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

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

**Select Installation Type:** “Typical” installs only the most popular output styles, filters, and connection files. Limiting the number of files installed speeds up performance. Advanced users can select “Custom” to hand pick the file groups to install, and add additional styles, filters, and connection files.

**Select Destination:** By default, EndNote is installed in the C:\Program Files\EndNote X5 folder. The Demo version is installed in the C:\Program Files\EndNote X5 Demo 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.

---

**NOTE:** If the installer detects a full version (not a demo version) of EndNote on your computer, it will give you the option to continue with the installation or quit. If you continue, be advised that you will need to reinstall your non-demo version of EndNote in order to use it after you run the EndNote X5 Demo version.

---

**Select Components:** (Custom installations only) If you selected a Custom installation, see “Selecting Features” on page 18.

**Select Default Citation Manager:** (Microsoft Word 2007 and 2010 only) If the installer detects Microsoft Word 2007 or 2010, it asks whether to “Use EndNote as my default citation manager.” Cite While You Write will be installed in Word 2007 or 2010 in any case, but when this item is selected the installer will hide 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 X5 is Successfully Installed” dialog, click Register to register your copy of EndNote, and then click Finish to close the installation program.

To make sure the program installed correctly, see “Checking Your Installation” on page 21.

---

## Installed Files

The full EndNote installation includes the following default folders and files.

### Program Folder

C:\Program Files\EndNote X5, or  
C:\Program Files (x86)\EndNote X5 (64-bit Windows versions)

- ◆ EndNote.exe application file
- ◆ EndNote.chm Help file  
You can double-click the file to view it. In the EndNote program, select Contents from the Help menu.

Pressing the F1 key on your keyboard or clicking the Help or ? button in the program brings up a context-sensitive Help topic.

- ◆ GettingStartedGuide.pdf gives a tour of the program
- ◆ EndNoteHelp.pdf is a compilation of all the Help topics in the online Help system
- ◆ Readme.txt text file contains late-breaking news
- ◆ Examples shortcut folder  
This is a shortcut to an Examples folder that contains sample files to follow when using the guided tour found in Chapter 3 of the Getting Started Guide. You can also use the samples to experiment while learning EndNote.

- ◆ **Styles folder**  
This folder contains bibliographic styles for formatting citations and a bibliography. A Typical installation includes only the most popular styles. With a Custom installation, you can choose from a full collection of over 4,500 bibliographic styles.
- ◆ **Connections folder**  
This folder contains connection files to connect to and search online bibliographic databases. A Typical installation includes only the most popular files. With a Custom installation, you can choose from a collection of thousands.
- ◆ **Filters folder**  
This folder contains import filters for importing text files downloaded from online bibliographic databases. A Typical installation includes only the most popular filters. With a Custom installation, you can choose from a collection of hundreds.
- ◆ **Terms Lists folder**  
This folder contains journal abbreviation term lists. These lists contain thousands of journal names and standard abbreviations. Import a list into your library's Journals term list to use the abbreviations in your bibliographies.
- ◆ **Spell folder**  
This folder contains spell check dictionaries for the EndNote spell checker.
- ◆ **Templates folder**  
This folder contains Microsoft Word templates to quickly set up your papers for electronic submission to publishers.
- ◆ Various additional folders and files are installed to support the EndNote program and to integrate EndNote with other software programs.

## **Shared Folder**

Open the Shared Documents or Public Documents folder in Windows Explorer to find the EndNote folder located at:

**Windows 7:** C:\Users\Public\Documents\EndNote

**Windows XP:** Documents and Settings\All Users\Shared Documents\EndNote

**Windows Vista:** C:\Users\Public\Public Documents\EndNote

- ◆ **Examples folder**  
This folder contains a sample library and other sample documents and graphics to use while learning EndNote.



- ◆ You may want to use the shared EndNote folder to store your libraries so that they are available to all users on your computer.

## Personal Folder

Open the My Documents or Documents folder in Windows Explorer to find the EndNote folder located at:

**Windows 7:** C:\Users\UserName\Documents\EndNote

**Windows XP:** C:\Documents and Settings\[UserName]\My Documents\EndNote

**Windows Vista:** C:\Users\[UserName]\Documents\EndNote

These folders are created when you create or modify a file:

- ◆ Styles folder contains new or modified bibliographic styles
- ◆ Connections folder contains new or modified connection files
- ◆ Filters folder contains new or modified import filters

While the Program Files folder contains the default styles, connection files, and filters, your personal EndNote folder contains those files that you have created or modified. This prevents changes to the original files, and assures that you will not inadvertently delete a customized file when you remove or upgrade the EndNote program. It also allows you to make changes to files even though you may not have administrator access to modify files in the Program Files folder. EndNote displays a single list of the files found in both locations. If a file of the same name appears in both locations, EndNote will display only the file found in your personal folder.

You can change your personal folder locations. See “Folder Locations Preferences” in EndNote Help for more information.

## Preferences Folder

Depending on your settings, these folders may be hidden from view in Windows Explorer.

**Windows 7:** C:\Users\[UserName]\App Data\Roaming\EndNote

**Windows XP:** C:\Documents and Settings\[UserName]\Application Data\EndNote

**Windows Vista:** C:\Users\[UserName]\App Data\Roaming\EndNote

While many EndNote preferences are stored in the Windows registry, some are stored in your personal preferences folder. It contains the connect.log file that records your latest online

---

## Custom Installations/ Adding Content Files

search, the RefTypeTable.xml file that stores your reference type preferences, saved search strategies, and various other settings.

Although we recommend that you use the Typical installation option to install EndNote, the Custom installation option can be useful if you are low on disk space, if you need to reinstall only certain EndNote components, or if you would like to add additional content files (output styles, import filters, and/or connection files).

### To perform a new custom installation:

1. Follow the instructions for “EndNote Installation” on page 13.
2. On the “Select Installation Type” dialog, select Custom.
3. From the “Select Features” dialog, read “Selecting Features” on page 18 to determine what you would like to select or deselect for your installation.

---

**NOTE:** If the installer detects another copy of EndNote in the destination folder, it gives you the option 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 is already installed:

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. Do one of these:
  - ◆ Start the EndNote installation program.
  - ◆ From the Windows Start menu, select Control Panel or select Settings, and then Control Panel. Then select Add or Remove Programs. In the list, click EndNote X5, and then click Change.
3. On the “Application Maintenance” dialog, select the Modify option, and then click Next.
4. From the “Select Features” dialog, expand the list of items, and then select or deselect the EndNote features for your 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
- ◆ Getting Started Guide

### Word Templates/Add-ins:

- ◆ Templates for Microsoft Word
- ◆ Cite While You Write for Microsoft Word

### OpenOffice.org Extension

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

**Additional Filters:** These files for importing text files of reference data are grouped by information service provider.

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

**Spelling Dictionaries:** These are dictionaries available for the spell checker.

Click the plus sign next to each category to display a detailed list of items. For each category or subcategory, click the triangle next to the name to select from the available installation options. To install a feature, select one of these options.

- ◆ Will be installed on local hard drive.
- ◆ Entire feature will be installed on local hard drive.

## 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.

We strongly recommend that you uninstall any earlier version of EndNote before you install EndNote X5. See “Uninstalling EndNote” on page 23.

---

**NOTE:** If you do not uninstall your earlier version of EndNote, then the Setup program will install EndNote X5 in its own folder and call the folder EndNote X5.

---

During installation, you will need to enter both your new EndNote product key (located in the EndNote X5 CD packaging or on the order confirmation for your digital product) and your old product key or serial number. Note that the Demo version of EndNote does not require these.

Install the upgrade just as you would a new installation. See “EndNote Installation” on page 13.

---

## Backing Up or Replacing Files

If you try to install EndNote X5 in the installation folder of an earlier version of EndNote, the program alerts you and gives you two options.

- ◆ **Backup older files:** EndNote X5 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 X5, you should select 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 X5.
- ◆ **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 X5. **Do not** select 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.

---

**NOTE:** No matter which option you choose, your libraries will not be deleted nor will any non-EndNote files in the EndNote folder.

---

---

## Opening and Converting Old EndNote Libraries

EndNote X5 opens and uses libraries created with EndNote 8 and later. It converts libraries created with even earlier versions of EndNote to the latest file format.

### To convert an old EndNote library (created before version 8):

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

EndNote will warn you 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 then click Save. The conversion makes a copy of the original library in the latest file format, and leaves the original library intact.

---

## Using Old Style, Filter, and Connection Files

EndNote X5 can use custom styles, filters, and connection files that were created with EndNote versions 4.0.1-X5. Once you edit and save one of these files with EndNote X5, it is converted to the latest format, which can be used with EndNote versions 8 to EndNote X5.

All of the styles, filters, and connection files supplied with EndNote X5 have been updated to the latest format. The new filter and connection files can be used by previous versions of EndNote, with new fields simply ignored. However, the updated styles *cannot* be used with versions of EndNote prior to version 8.

## Checking Your Installation

---

### To Begin Using EndNote

From the Start menu, select Programs > EndNote > EndNote Program.

First, a dialog may ask whether you want to open a new EndNote Web account or integrate with an existing EndNote Web account. For information about EndNote Web, see “Transferring References between EndNote Web and EndNote” in EndNote Help.

Next, a dialog may ask you to open a library file. You can create or open an EndNote library, or select Cancel or Close. A Sample Library is provided in an Examples folder to help you get familiar with EndNote.

To check the version number of EndNote, select 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 Cite While You Write Support

To see whether Cite While You Write is correctly installed, start Microsoft Word or the OpenOffice.org Writer.

- ◆ In Word 2003, click on the Tools menu to see EndNote commands on an EndNote X5 submenu.

- ◆ In Word 2007 and 2010, you should see an EndNote X5 tab.
- ◆ In OpenOffice.org Writer, you should see EndNote commands on an EndNote X5 menu.

---

**NOTE:** Cite While You Write commands may not be available if you installed or upgraded your word processor *after* installing EndNote.

---

If Cite While You Write commands do not appear in Microsoft Word or OpenOffice.org Writer, repair the EndNote installation.

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. Make sure that all Microsoft Office and OpenOffice.org applications are closed, including any Quickstarter applications.

The OpenOffice.org Quickstarter may appear in your System tray. Right-click on the icon, and then select Exit Quickstarter.

3. From the Windows Start menu, select Control Panel or select Settings, and then select Control Panel.
4. Select Add or Remove Programs.
5. Highlight EndNote X5, and then click Change.
6. Select Repair, and then click Next.

Your entire EndNote installation is checked and repaired as needed. For more information, see “No EndNote Commands in Word” in EndNote Help.

## Automatically Updating Files

You can automatically update EndNote X5 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 Web site at <http://www.endnote.com>. We continually update output styles, filters, and connection files.

---

## Uninstalling EndNote

Before you remove EndNote, back up your libraries and any other files you have created or customized.

For volume and site license installations, see “Licensing of Volume Copies” in EndNote Help.

---

### Uninstalling Word 2007 and 2010 Settings

Word 2007 and 2010 settings are typically registered during installation of the EndNote program, and in those cases they will also be uninstalled along with the program. You can jump to the next section called “Uninstalling the EndNote Program” on page 24 for more information.

If you used the Configure EndNote utility for a specific user account, to suppress the “Citations and Bibliography” group on the References tab in Word 2007 or 2010, you should use that utility again to uninstall.

#### **To uninstall Word 2007 or 2010 settings:**

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, select 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 then click Next.
4. Continue through the uninstall process as instructed.

This uninstalls a single Word 2007 or 2010 setting, and only for the current user.

---

## Uninstalling the EndNote Program

### To uninstall EndNote:

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. From the Windows Start menu, select Control Panel, or select Settings, and then select Control Panel.
3. Select Add or Remove Programs.
4. In the list of currently installed programs, select EndNote X5.
5. Click the Remove button.

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

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. From your EndNote CD, run Setup.exe.
3. On the “Application Maintenance” dialog, select Remove, and then click Next.
4. Click Next again to begin removing EndNote.

The uninstall procedure removes only files, groups, and icons installed by the EndNote installer the last time it was run. For example, if you used the installer’s Custom installation option to reinstall only style files, the Uninstall program removes only style files.

### To remove any modified EndNote files that remain:

We purposely do not remove any EndNote libraries or customized files. You can manually delete these files from Windows Explorer from the following folders.

#### Windows XP

C:\Program Files\EndNote X5  
C:\Documents and Settings\All Users\Shared Documents\EndNote  
C:\Documents and Settings\[UserName]\My Documents\EndNote  
C:\Documents and Settings\[UserName]\Application Data\EndNote

#### Windows Vista

C:\Program Files\EndNote X5  
C:\Users\Public\Public Documents\EndNote  
C:\Users\[UserName]\Documents\EndNote  
C:\Users\[UserName]\App Data\Roaming\EndNote

#### Windows 7

C:\Program Files\EndNote X5  
C:\Users\Public\Public Documents\EndNote



C:\Users\[UserName]\Documents\EndNote  
C:\Users\[UserName]\App Data\Roaming\EndNote

---

**NOTE:** If you are using a 64-bit version of Windows, your EndNote program folder will be: C:\Program Files (x86)\EndNote X5.

---



# Chapter 2: Introduction to an EndNote Library

This chapter 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 a reference in the EndNote library.
- ◆ Save references to custom groups.
- ◆ Quit from the EndNote program.

---

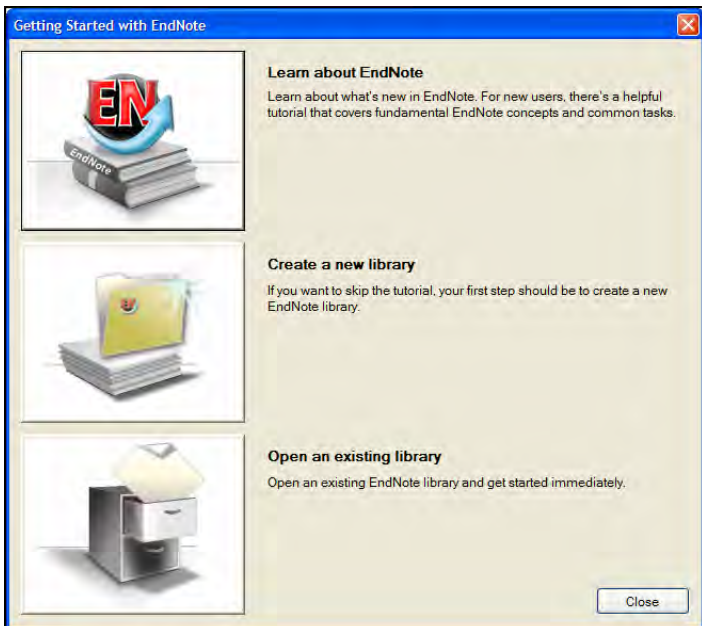
## Start EndNote

To start the EndNote program and open the sample library:

1. From the Start menu, select Programs > EndNote > EndNote Program.

If this is the first time you have used the EndNote program, a dialog appears that prompts you to set up EndNote Web. For this section of the tour, skip setting up EndNote Web.

The following dialog appears prompting you to open a reference library.



---

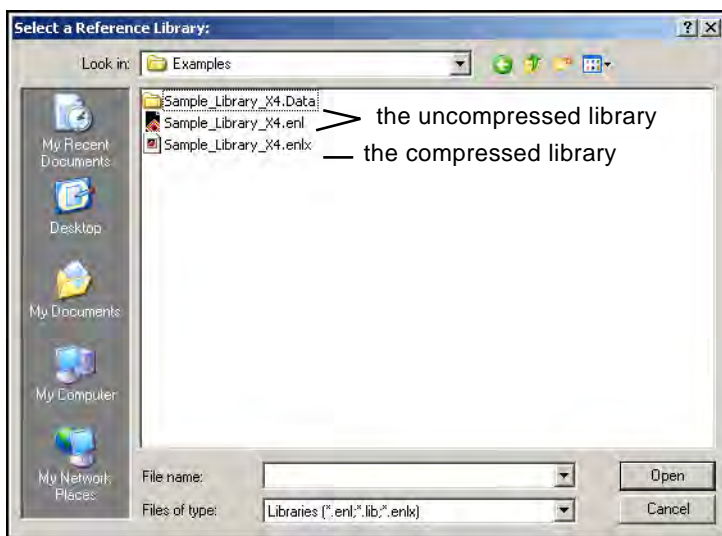
**NOTE:** If you have set a favorite library to open automatically, that library will open instead of the dialog shown above. If this happens, close the library. From the File menu, select Open > Open Library. Continue with step 3.

---

2. Click the File Cabinet icon.
3. In the file dialog, locate and open a reference library. Use the Look in: menu to find the EndNote X5 Examples folder.
  - ◆ Select the C: drive and Open.
  - ◆ Select Program Files and Open.
  - ◆ Select the EndNote X5 folder and Open.
  - ◆ Select the Examples folder shortcut and Open. The Examples folder is actually in your Shared Documents or Public Documents folder.

The example library is shipped to you as a single compressed file called Sample\_Library\_X5.enlx. Open the Sample\_Library\_X5.enlx file and EndNote extracts the uncompressed library files (Sample\_Library\_X5.enl and Sample\_Library\_X5.Data) and opens them for viewing.

If you have previously opened the compressed sample library, select Sample\_Library\_X5.enl, and then click Open.



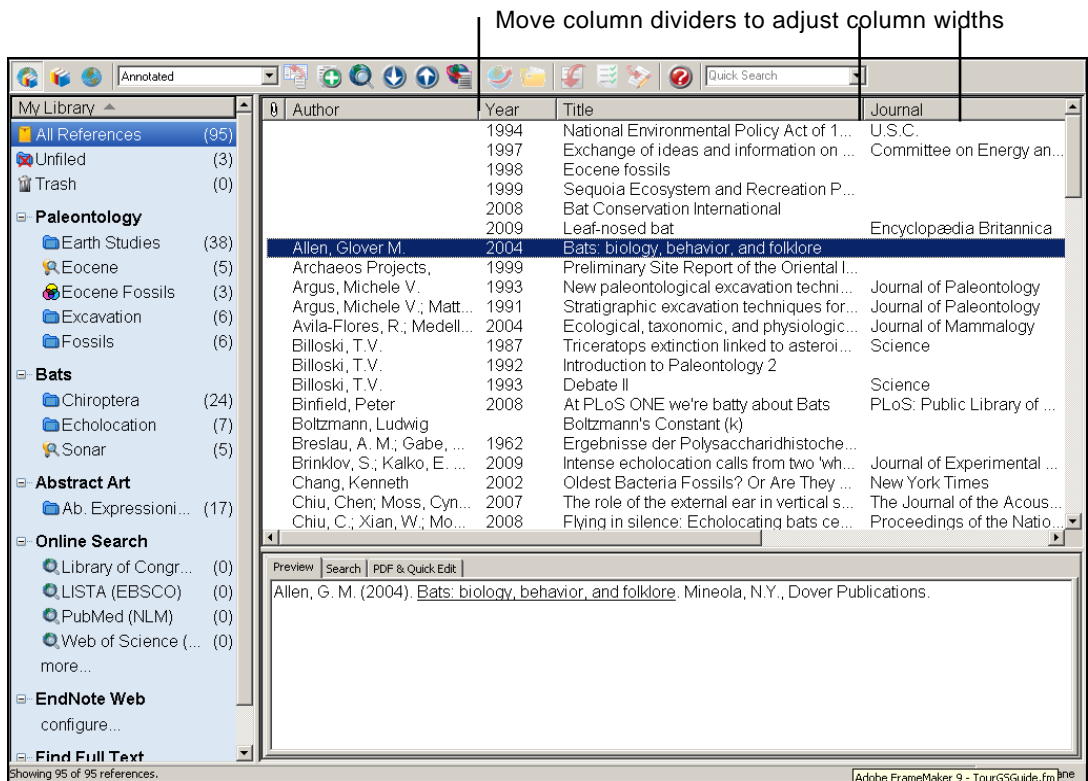
---

**NOTE:** You can open a library from within EndNote. From the File menu, select Open > Open Library.

---

# The Library Window

When you open the sample library, you will see the Library window listing all of the references that the library contains:



The Library window includes three panes:

**Reference List pane:** Displays a multi-column list of references. By default, the first column in the reference list shows a paper clip icon for references that include an attached file in the File Attachments field. This is followed by:

- ◆ First author's last name
- ◆ Year
- ◆ Title
- ◆ Journal name or secondary title
- ◆ Reference type
- ◆ URL

◆ Last Updated

---

**NOTE:** You can change the order of the fields that display in the reference list by selecting from the Edit menu, Preferences > Display Fields.

---

**Groups pane:** Displays various group sets that contain groups of references for easy retrieval.

**Tab pane:** Displays a Preview tab to view formatted references, a Search tab for searching either the current library or an online database, and a PDF & Quick Edit tab for quickly editing and viewing PDF files attached to the reference.

The information displayed in the reference list, as well as the font used for the display, can be changed using EndNote Preferences.

You can browse through the reference list 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 tab at the bottom of the Library window.

**To preview a reference:**

1. First, if you do not have a Tab pane in the window, click the Show Tab Pane button at the bottom of the window, and then click the Preview tab.
2. For this example, click the reference titled “Bats: Biology, behavior, and folklore.”

The Preview tab uses the current output style to display the selected reference as it will be formatted for a bibliography. EndNote’s output 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.

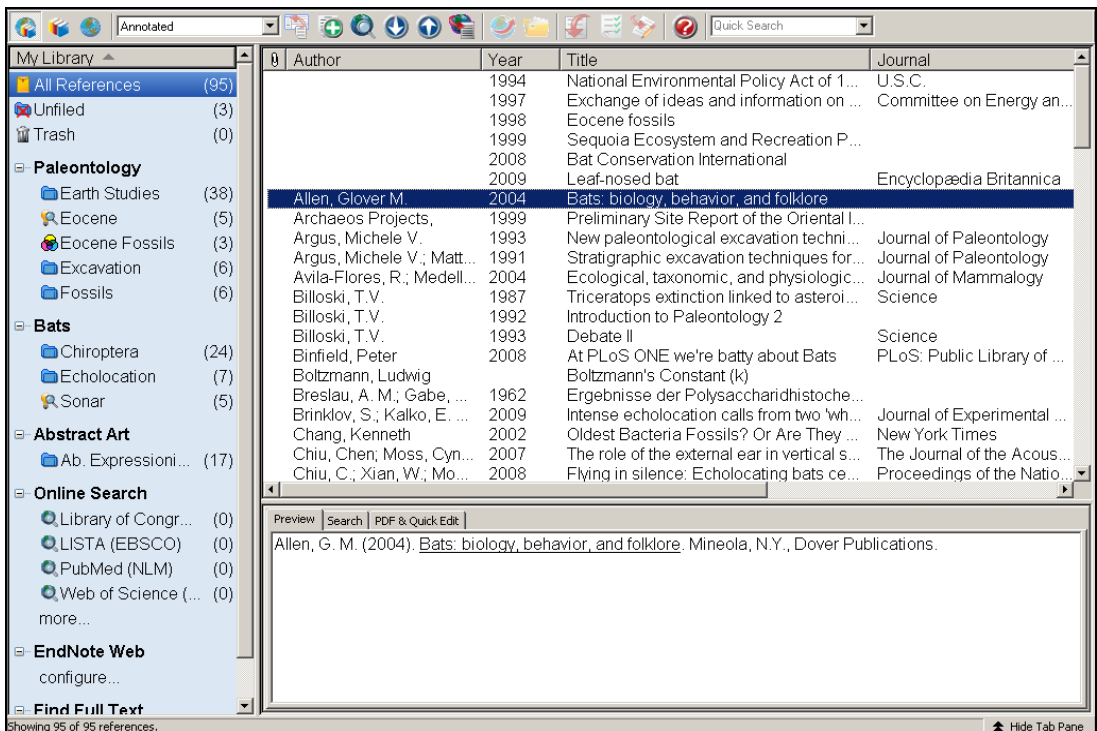
- To select a different output style to apply to the reference, go to the toolbar and select Numbered from the drop-down list of output styles.

**NOTE:** The style list displays your “favorite” output styles, but you can choose Select Another Style to pick from other installed files. A Typical installation installs only the most popular output styles, but more than 4,500 output styles are available with EndNote.



Only one reference is displayed on the Preview tab. If multiple references are selected, only the active reference (surrounded by a dotted line) is displayed.

The format of the reference on the Preview tab can be changed at any time by choosing a different output style.



When the Tab pane is showing, a Hide Tab Pane button is available at the bottom of the window. You can click Hide Tab

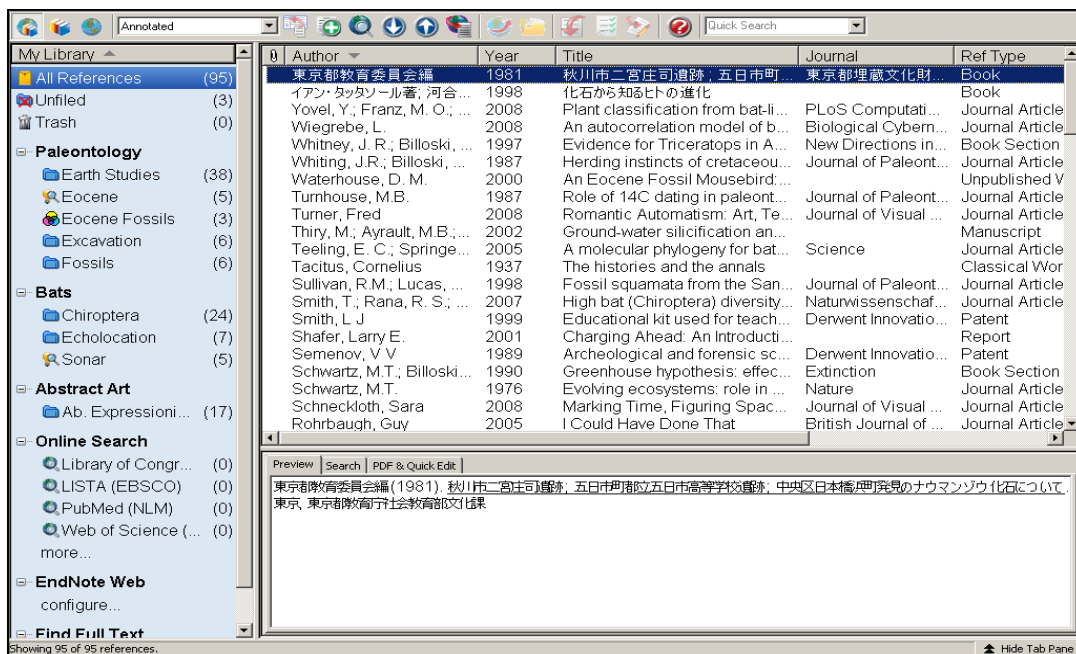
Pane to hide the Preview tab and the other tabs. The name of the button will toggle to Show Tab Pane.

## Sort the References

References can easily be 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 Chapter 3: "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 to reverse the sort order and see the references sorted in descending order.



## Select and Open a Reference

- Click the Author column heading to return the sort order of the library to an alphabetical list sorted by the author names.

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 any reference to select it. Press the Up or Down Arrow to select the previous or next reference.

### To quickly find and display a reference:

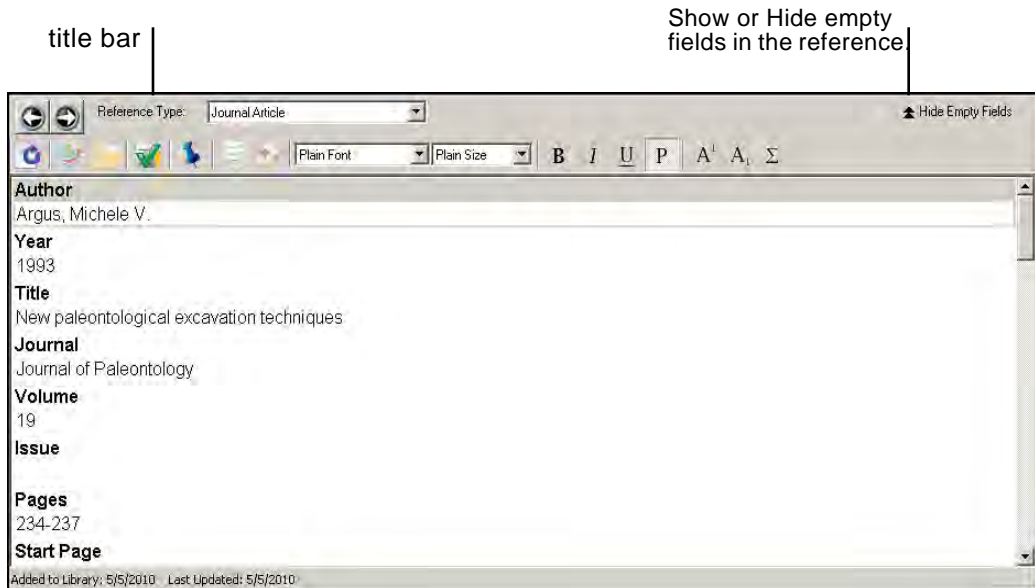
- Select the first Argus reference in the list. Now that the reference is selected, there are a number of things you can do, such as view its contents, copy, cut, delete, or edit it.
- Open the selected Argus reference by pressing the Enter key or by using the Edit References command on the References menu.

The screenshot shows the EndNote library window with a list of references. The 'Author' column is selected, and the reference by Argus, Michele V. is highlighted. The preview pane at the bottom displays the following information:

Preview Search PDF & Quick Edit

Argus, M. V. (1993). "New paleontological excavation techniques." *Journal of Paleontology* 19: 234-237.  
 The latest excavation techniques used by scientists world-wide with examples of current studies at the KT boundary in Nanxiong Basin, Guangdong Province, China. Possibly uncovers evidence for new extinction theory.

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



Click and drag to resize the window.

This is where you enter or edit information for a reference.

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 backward 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.

---

## Close the Reference

Close the reference. You can do this in one of these ways:

- ◆ Click the X close button in the upper corner of the Reference window (not the outer close button for the library).
- ◆ From the File menu, select Close Reference.
- ◆ From the keyboard, press Ctrl+W. Note that many of the menu commands have a keyboard equivalent next to them.

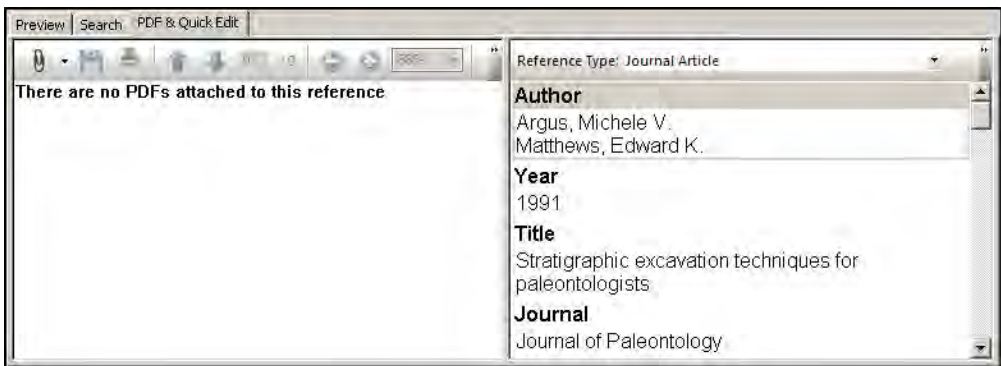
EndNote prompts you to save your changes. Click Yes to save your changes.

## PDF & Quick Edit Tab

### About the Quick Edit Pane

You can quickly edit your references by clicking on the PDF & Quick Edit tab. Most functionality is the same as working in the Reference window. Enter text in a field by clicking on the field. All commands are available via the menus including contextual menus.

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



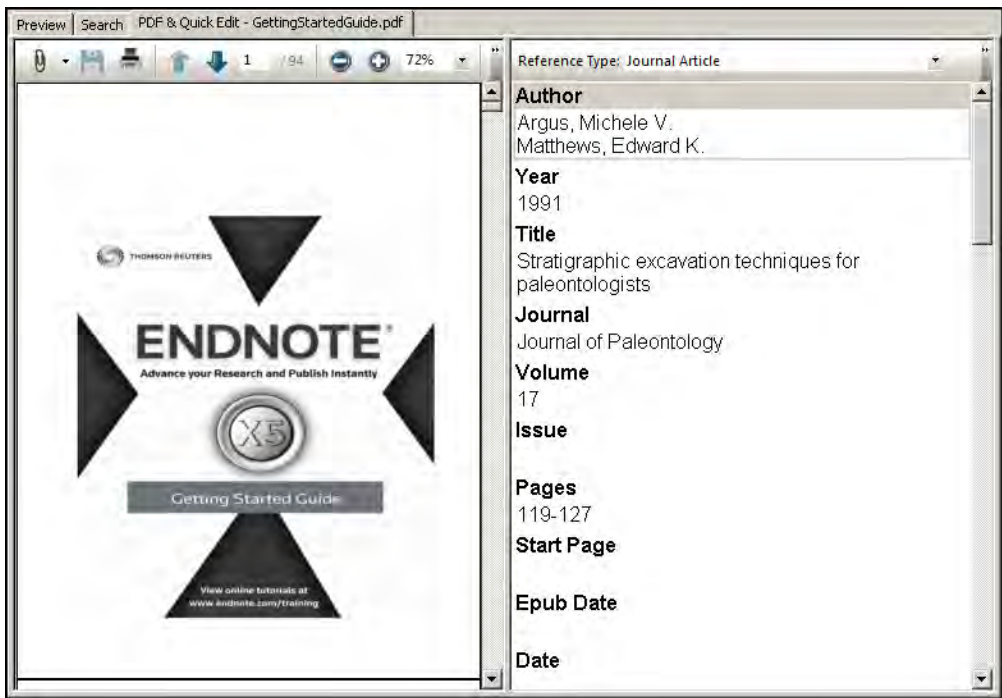
### About the PDF Viewer Pane

The PDF Viewer pane allows you to open and view PDF files attached to the current reference.

Let's attach a PDF file to the reference

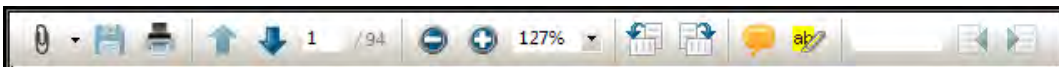
1. Place your cursor inside the PDF Viewer pane. Note that a message displays that says: "There are no PDFs attached to this reference."
2. Press Ctrl+Alt+A to open a select a file dialog. Alternatively, you can click the paper clip icon, and then select Attach PDF from the menu.
3. Navigate to the folder Program Files\EndNote X5.
4. 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.
5. Select the file titled GettingStartedGuide.pdf.
6. Click Open to insert the file into the reference.

7. To save the PDF file, navigate away from the current reference by clicking on another reference in the library list.
8. Select the Argus reference to display the Getting Started Guide in the PDF Viewer pane.



EndNote automatically opens the first PDF attached to a reference when you select the PDF & Quick Edit tab.

A floating toolbar appears within the PDF Viewer pane that displays the following icons.



The options include:

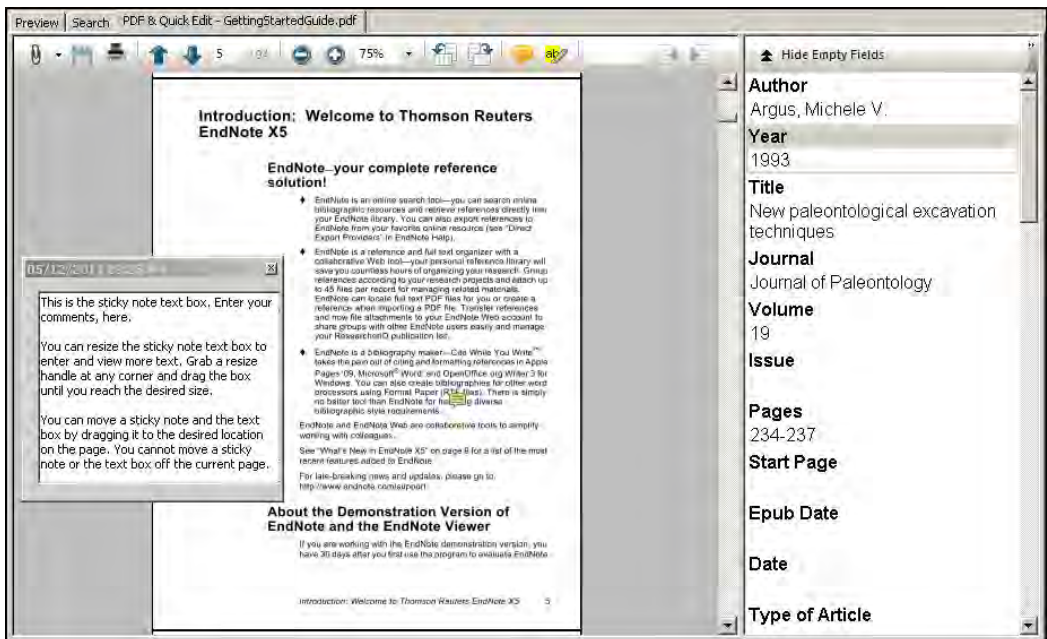
- ◆ PDF Attachments (Paper Clip icon with contextual menu)
- ◆ Save PDF
- ◆ Print
- ◆ Previous Page \ Next Page
- ◆ Go to (page)

- ◆ Zoom Out \ Zoom In
- ◆ Rotate Counterclockwise \ Rotate Clockwise
- ◆ Sticky Note
- ◆ Highlight Text
- ◆ Find (search PDF).

You can also right-click within the PDF Viewer pane to open a contextual menu that includes many of these options.

### Let's create a sticky note

1. Select the Sticky Note icon from the floating toolbar.
2. Navigate to the section in the PDF where you want to add the sticky note.
3. Click the left mouse button to display a Sticky Note icon along with a Sticky Note text box.
4. Enter your comments in the Sticky Note text box.
5. Click the Save icon in the floating toolbar. Click Yes when prompted.



A Highlight icon allows you to select text to highlight. A Find feature is available that lets search for words and phrases within a PDF document.

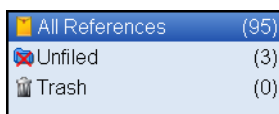
See “The PDF & Quick Edit Tab” in EndNote Help to learn more about PDF Viewer and Quick Edit features.

---

## Save References to a Custom Group

The left pane of the Library window lists groups of saved references. The first three groups are permanent.

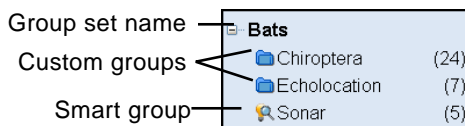
- ◆ **All References** displays all of the references in the library.
- ◆ **Unfiled** contains references that are not part of a custom group.
- ◆ **Trash** contains references that have been deleted from the library but not yet permanently eliminated.



Below the permanent groups, you can create group sets to organize up to 500 custom, smart, and combination groups in the library.

- ◆ A custom group is built by specifically adding individual references to the group.
- ◆ A smart group is compiled automatically and is based on a search strategy.
- ◆ a combination group consists of custom and/or smart groups.

The sample library has several custom groups of references. Click the group names under the Bats set 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 custom group and add references to it:

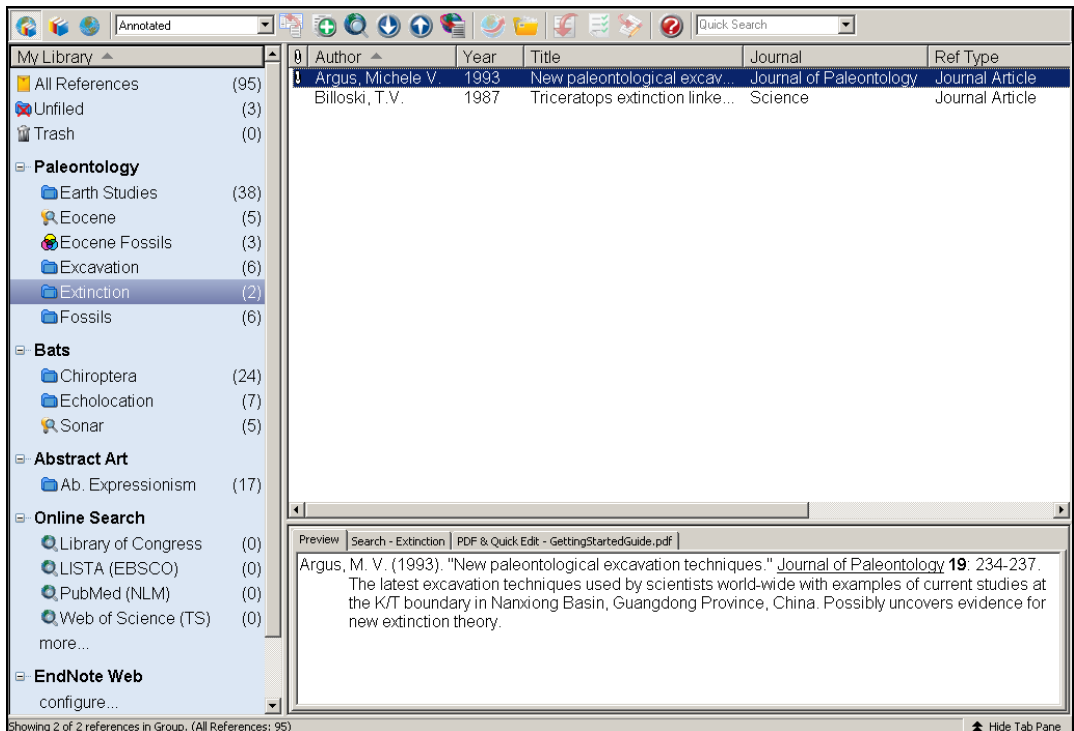
1. Display one of the groups in the Paleontology set so that the new group will be created in that set.
2. From the Groups menu, select Create Group.

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

3. Type "Extinction" as the group name, and then press Enter or click in the reference list area to save the change.

There are no references in the new Extinction group.

4. Select the All References group to display all references in the library.
5. In the Author column, highlight the first reference by Argus and the first reference by Billoski. To select noncontiguous references, hold down the Ctrl key as you click on them.
6. Drag the selected references to the new Extinction group and drop them on the title of the group. You could go to the Groups menu, and then select Add References To > Extinction.
7. Select the Extinction group to display the two references now included in the group.



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

**To move the group to a different group set:**

1. Click the group title Extinction to display the group.

2. Drag it to the Bats group set and drop the group anywhere in the Bats set.

**To delete a custom group:**

1. Right-click the Extinction group name to display a contextual menu, and then select Delete Group.
2. When you are asked to verify the deletion, click Delete.

Only the Group subset is deleted; no references are deleted from your library.

Many of the commands for managing groups are available both from the Groups menu and from the right-click contextual menu.

---

## Related Sections in EndNote Help

See the following topics in EndNote Help for information related to this portion of the tour:

- ◆ “Sorting the Library” to learn more about sorting.
- ◆ “The EndNote Library” to learn how to change the display of the Library window.
- ◆ “The PDF & Quick Edit Tab” to learn more about PDF Viewer and Quick Edit features.
- ◆ “Using Groups” to learn more about creating and managing groups.



# Chapter 3: Setting EndNote Preferences

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

- ◆ Display EndNote Preferences.
- ◆ Set a favorite library to open each time you start EndNote.
- ◆ Change the display fonts.

---

## Open the Sample Library

If EndNote is not already running, start it and open the library called `Sample_Library_X5.enl` as shown in “Start EndNote” on page 27.

---

## Access EndNote Preferences

### To view or change the EndNote preferences:

From the Edit menu, select Preferences.

---

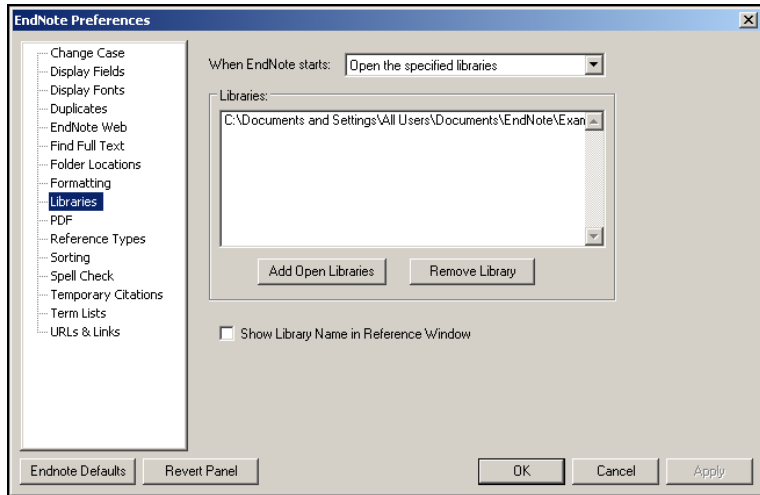
## Set a Default Library

You can assign a library to open automatically every time you start EndNote. You will find it useful to set the sample library (`Sample_Library_X5.enl`) as your favorite library for now. Later, when you create your own library, you can set it as your favorite library.

### To set a favorite library:

1. Go to the Edit menu, and then select Preferences.
2. In the list on the left, select Libraries.
3. Select “Open the specified libraries” from the When EndNote Starts menu.

4. Click Add Open Libraries. You should see the full path and file name of the sample library (Sample\_Library\_X5.enl) listed at the top of the box.



5. Click Apply to save this change.

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

---

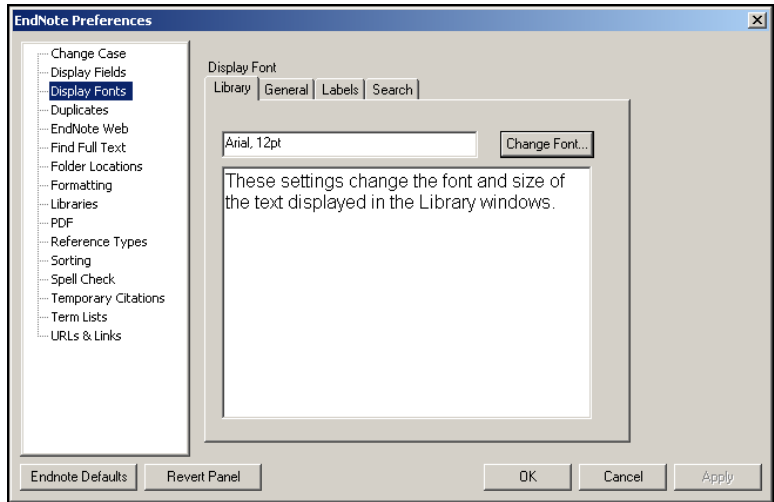
## Change the Library Display Font

Pick a different font to display text in the Library window and the Reference window.

### To change the display fonts:

1. Go to the Edit menu, and then select Preferences.
2. In the list on the left, click Display Fonts to display a dialog with four tabs.
  - ◆ The Library tab determines the font and size of the references listed in the Reference List pane of the Library window.
  - ◆ The General tab changes the font used to display most text that is typed into EndNote such as in the Reference or Style windows. The General 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 Labels tab determines the font and size used for the Reference window field labels.

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



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). 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 sample 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). Click OK to save the change.
7. Click OK to leave the Preferences dialog.

---

## Related Sections in EndNote Help

See the following topics in EndNote Help for information related to this portion of the tour:

- ◆ “The EndNote Library” to learn how to change the display of the Library window.
- ◆ “Preferences, Toolbars, & Shortcuts” to learn how to customize your version of EndNote.



# Chapter 4: Entering a Reference

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

- ◆ Enter a reference into a library.
- ◆ Attach a file to a reference.

---

## Open the Sample Library

If EndNote is not already running, start it and open the library called Sample\_Library\_X5.enl as shown in “Start EndNote” on page 27.

---

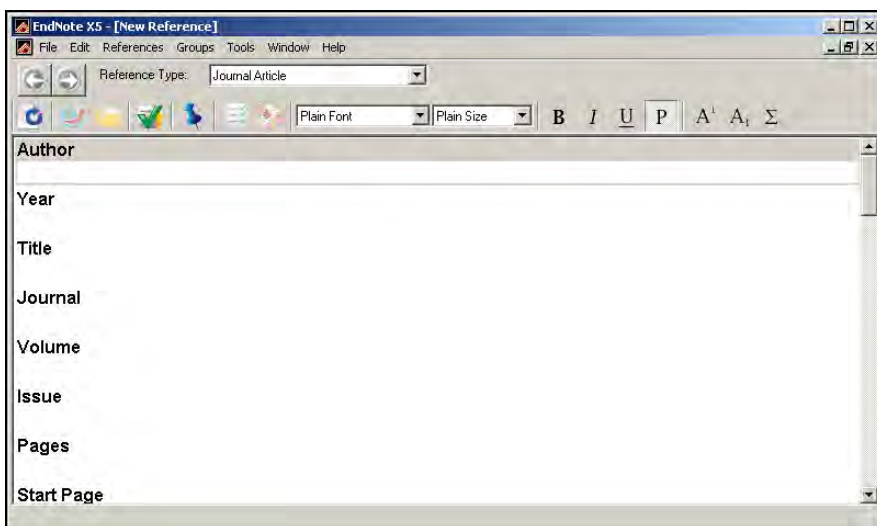
## Create a New Reference

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 “Searching an Online Database” on page 51.
- ◆ Import text files of references that have been downloaded from online bibliographic databases as demonstrated in “Importing Reference Data into EndNote” on page 63.

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

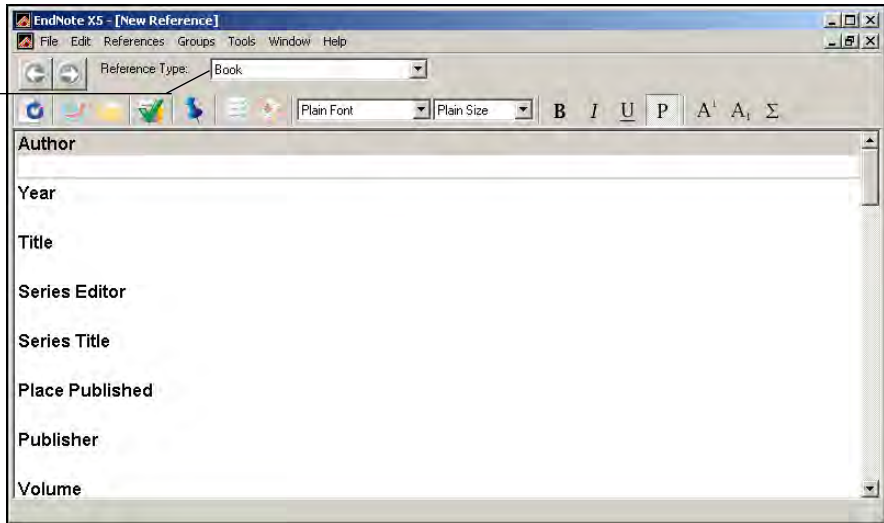
1. Click in the reference list, and then from the References menu, select New Reference to display an empty Reference window.



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. Select a reference type. Click the Reference Type menu, and then select Book.

Reference Type set to "Book"



Notice that the Field list changes to reflect the type of bibliographic information you would record for a book. 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 Enter.

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 EndNote Help.

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

Morre, Nicole

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

<b>Author</b> Tiberius Rex Morre, Nicole
--

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. Press Enter.

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

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. Type “2006” as the search term.
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. 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 up to 64 K of text into each of these fields, which amounts to 10-12 pages of text.

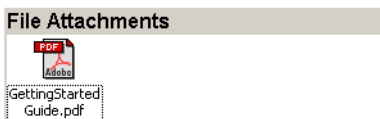
6. Attach a PDF file to the reference. You can attach almost any type of file to the File Attachments field of a reference.

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

- a. Navigate to the folder Program Files\EndNote X5.
- 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 GettingStartedGuide.pdf.

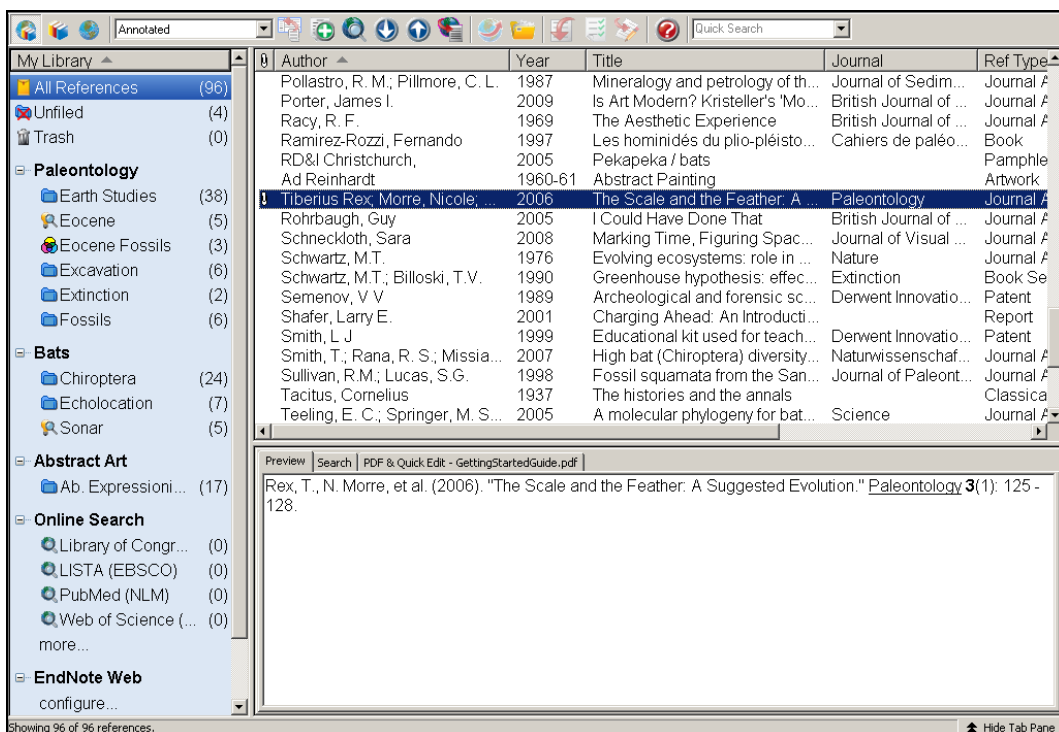


- d. Click Open to insert the file into the File Attachments field. A file icon will appear in the field.



You can attach up to 45 different files to a single reference. Double-click the file icon to open the file with the default program for the file type.

7. From the File menu, select Close Reference to close the Reference window.
8. When prompted to save changes, click Yes. Your new reference will appear in the Library window.



A paper clip icon appears next to the reference to indicate an attached file.

## Locate References that Contain Attached Files

You can easily locate those references that contain attached files.

**To locate the references containing attached files:**

Click the paper clip icon in the first 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.

📎	Author	Year	Title	Journal	Ref Type
📎	Argus, Michele V.	1993	New paleontological excavati...	Journal of Paleont...	Journal Article
📎	Tiberius Rex; Morre, Nicole; ...	2006	The Scale and the Feather: A ...	Paleontology	Journal Article
	東京都教育委員会編	1981	秋川市二宮庄司遺跡、五日市町...	東京都埋蔵文化財...	Book
	イアン・タッタソール著; 河合信和訳	1998	化石から知るヒトの進化		Book
	Yovel, Y.; Franz, M. O.; Stilz, ...	2008	Plant classification from bat-li...	PLoS Computatio...	Journal Article
	Wiegrebe, L.	2008	An autocorrelation model of b...	Biological Cyberne...	Journal Article
	Whitney, J. R.; Billoski, T.V.; J...	1997	Evidence for Triceratops in A...	New Directions in ...	Book Section
	Whiting, J.R.; Billoski, T.V.; J...	1987	Herding instincts of cretaceou...	Journal of Paleont...	Journal Article
	Waterhouse, D. M.	2000	An Eocene Fossil Mousebird:...		Unpublished Work
	Turnhouse, M.B.	1987	Role of 14C dating in paleont...	Journal of Paleont...	Journal Article
	Turner, Fred	2008	Romantic Automatism: Art, Te...	Journal of Visual C...	Journal Article
	Thiry, M.; Ayrault, M.B.; Griso...	2002	Ground-water silicification an...		Manuscript
	Teeling, E. C.; Springer, M. S...	2005	A molecular phylogeny for bat...	Science	Journal Article
	Tacitus, Cornelius	1937	The histories and the annals		Classical Work
	Sullivan, R.M.; Lucas, S.G.	1998	Fossil squamata from the San...	Journal of Paleont...	Journal Article
	Smith, T.; Rana, R. S.; Missia...	2007	High bat (Chiroptera) diversity...	Naturwissenschaften	Journal Article
	Smith, L J	1999	Educational kit used for teach...	Derwent Innovation...	Patent
	Shafer, Larry E.	2001	Charging Ahead: An Introducti...		Report

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

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

## Related Sections in EndNote Help

See the following topics in EndNote Help for information related to this portion of the tour:

- ◆ “The EndNote Library” to learn how to create your own library.
- ◆ “Entering and Editing References” to learn about typing references into your library and inserting images.

# Chapter 5: Searching an Online Database

With the EndNote Online Search command, you can search online bibliographic databases just as easily as you can search an EndNote library on your own computer. The results of your searches can be downloaded either into a temporary EndNote library or directly into your own EndNote library.

Another way to search online sources is with the Find Full Text command, which locates full text articles for your existing EndNote references.

This section will guide you through these basic steps:

- ◆ Connect to an online database.
- ◆ Search the database and download the references into an EndNote library.
- ◆ Find and attach the full text article for a reference.

---

**NOTE:** In order to follow 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 U.S. National Library of Medicine's online public access version of their MEDLINE database.

## For Users With Dial-up Internet Connections

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

**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 disconnects from an online database as soon as a search is completed, but 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 Sample Library

---

If EndNote is not already running, start it and open the library called Sample\_Library\_X5.enl as shown in “Start EndNote” on page 27.

---

## Select a Display Mode

You can choose from different display modes in the Library window by selecting one of these from the toolbar.

- ◆ Integrated Library & Online Search Mode
- ◆ Local Library Mode
- ◆ Online Search Mode

There are actually two different workflows. You may want to always work in Integrated Mode, with all groups and commands available, and with online search results downloaded directly into your open library. Or, you may want to work primarily in Local Library Mode, with Online Groups suppressed until you explicitly switch to Online Mode to download references into a temporary library.

- ◆ In Integrated Library & Online Search Mode, all groups and commands are available. When you download references from an online database, they are saved directly into the open library.
- ◆ In Local Library Mode, the Online Search groups are not available. All local library commands are available. If you initiate an online search from the Tools menu, the display switches to Online Search Mode.
- ◆ In Online Search Mode, only the Online Search groups are available. When you download references from an online database, the references are stored in a temporary library until you save them to a permanent EndNote library. This allows you to download references from online databases and review them without affecting your local library. Many library commands are not available in Online Search Mode. When you close Online Search Mode, the display changes to Local Library Mode.

Try clicking on the three different mode buttons at the left of the toolbar to see how the Groups pane changes in the Library window.



To continue the tour, click the left icon to select Integrated Library & Online Search Mode so that all groups and commands are available.

---

## Connect to an Online Database

The first step in searching an online database is connecting to it.

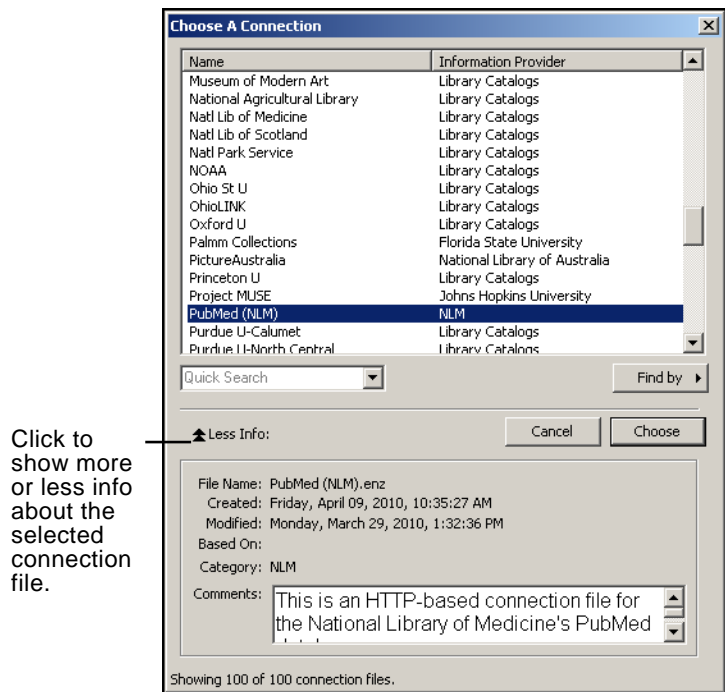
### To connect to the PubMed Database:

1. Go to the Tools menu and select Online Search to see the available list of online databases. You could also look under Online Search in the Groups pane, and then click More.

---

**NOTE:** The Groups pane will remember databases you have connected to in the past for easy access under Online Search. You can also customize a list of favorite databases to search by using the Connection Manager.

---



---

**NOTE:** This window displays the connection files available in your Connections folders. A Typical installation installs only the most popular connection files, but more than 4,100 connection files are available with EndNote.

---

Click the Find By button to view a list of various categories of databases to help you locate the one that you need. Or, type text into the Quick Search text box, and then press Enter.

2. Select the PubMed connection file, and then click Choose. You can begin entering your search terms in the fields.

By selecting this 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.

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

The screenshot shows the EndNote search interface for PubMed MEDLINE. The window title is "Online Search - PubMed MEDLINE at PubMed (NLM)". At the top, there is a "Search" button, an "Options" dropdown, and a "Search Remote Library" dropdown. Below these are three search criteria rows. The first row is "Author (Smith, A.B.)" with a "Contains" operator and a text input field. The second row is "And" followed by "Year" with a "Contains" operator and a text input field. The third row is "And" followed by "Title" with a "Contains" operator and a text input field. To the right of the search criteria are checkboxes for "Match Case" and "Match Words".

---

**NOTE:** For more detailed information on how to search PubMed, see "Importing References from PubMed" in EndNote Help.

---

---

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

---

---

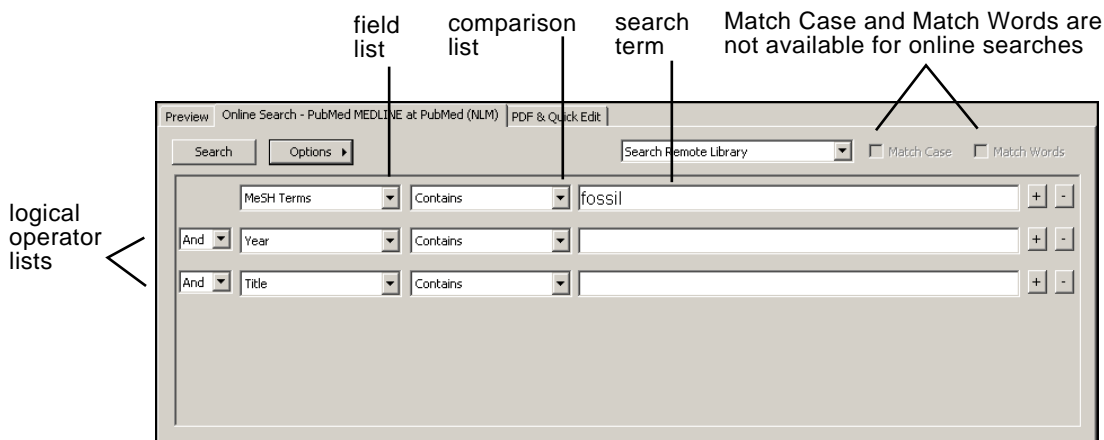
## Search the Database

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.

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

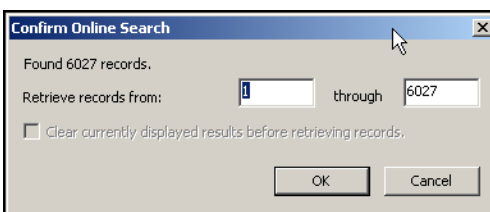
## To enter the search term(s) and perform the search:

1. Set the Field list for the first line to *MeSH Terms*, and enter "fossil" into the search text field. The Comparison list for online searches is always set to *Contains*.



2. Click Search.

EndNote sends the search request off to the online database 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:** You can halt a retrieval in progress by clicking the Cancel button on the Search tab. Records that have been processed up to that point already exist in the library.

---

---

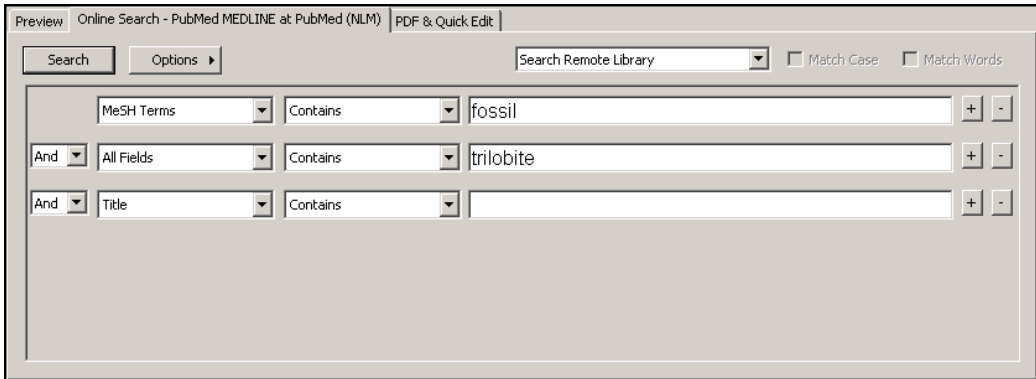
**NOTE:** PubMed is updated regularly, so you may find a different number of references than illustrated here.

---

If the result set seems too many, you can refine the search to get closer to exactly those references you want. Let's refine

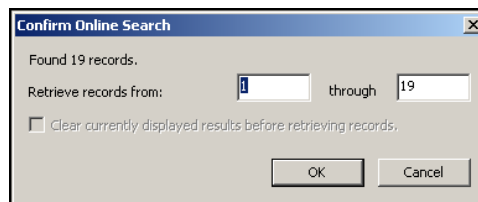
this search by looking for just those references that include mention of a “trilobite,” a group of extinct marine animals that were abundant in the Paleozoic era.

3. Click Cancel to return to the Search tab.
4. Set the operator at the beginning of the second search line to And.
5. In the second search line, select All Fields from the Field list and type “trilobite” as the search text.



6. Click Search.

This time fewer references are found.



7. Click OK to retrieve and save the matching references.

The references are downloaded into your library and appear both in the All References group and in a temporary group for the PubMed database connection.



The temporary PubMed (NLM) group will reset back to 0 references when you close the library.

The screenshot shows a reference management application window. On the left is a 'My Library' sidebar with categories like 'All References (114)', 'Unfiled (22)', 'Trash (0)', 'Paleontology', 'Bats', 'Abstract Art', 'Online Search', and 'EndNote Web'. The main area displays a table of references with columns for Author, Year, Title, Journal, and Ref Type. Below the table is a 'Preview' pane for 'Online Search - PubMed MEDLINE at PubMed (NLM)' showing search criteria: 'fossil' and 'trilobite'.

Author	Year	Title	Journal	Ref Type
Clarkson, E. N.; Levi-S...	1975	Trilobite eyes and the optic...	Nature	Journal Article
Foote, M.; Raup, D. M.	1996	Fossil preservation and the ...	Paleobiology	Journal Article
Fortey, R.; Chatterton, ...	2003	A Devonian trilobite with an ...	Science	Journal Article
Fusco, G.; Hughes, N. ...	2004	Exploring developmental m...	Am Nat	Journal Article
Gal, J.; Horvath, G.; Cl...	2000	Image formation by bifocal l...	Vision Res	Journal Article
Horvath, G.	1989	Geometric optics of trilobite...	Math Biosci	Journal Article
Hughes, N. C.	2003	Trilobite body patterning an...	Bioessays	Journal Article
Knell, R. J.; Fortey, R. A.	2005	Trilobite spines and beetle ...	Biol Lett	Journal Article
Lieberman, B. S.; Kari...	2010	Tracing the trilobite tree fro...	Arthropod Struct Dev	Journal Article
Park, T. Y.; Choi, D. K.	2009	Post-embryonic developme...	Evol Dev	Journal Article
Sepich, D. S.; Myers, ...	2000	Role of the zebrafish trilobit...	Genesis	Journal Article
Simpson, A. G.; Hugh...	2005	Development of the caudal ...	Evol Dev	Journal Article
Wagner, P. J.	2000	Exhaustion of morphologic ...	Evolution	Journal Article
Webber, A. J.; Hunda, ...	2007	Quantitatively comparing m...	Evolution	Journal Article
Webster, M.	2007	A Cambrian peak in morph...	Science	Journal Article
Webster, M.; Zelditch, ...	2011	Modularity of a Cambrian pt...	Evol Dev	Journal Article
Zhang, X. G.; Clarkson...	2009	Trunk segmentation of Cam...	Evol Dev	Journal Article
Zhiyi, Z.; Wenwei, Y.; Z...	2010	Evolutional trends and pala...	Proc Biol Sci	Journal Article
Zhu, M. Y.; Vannier, J.; ...	2004	Direct evidence for predati...	Proc Biol Sci	Journal Article

**NOTE:** If you would prefer to save references to a temporary library first, to verify which references you want to save, you would begin by selecting Online Search Mode.

**NOTE:** You can click the plus or minus icon next to a group set heading in order to display or hide the list of groups under that heading.

## Review the References

At this point, you can view the retrieved references to make sure you want to keep all of them. You may find that some of the references are not helpful for your research.

While you could open each reference individually to scan through the bibliographic data, you can also use the Preview tab or the Quick Edit pane.

**To quickly look at the new references:**

1. Click on a reference in the reference list.

2. Click the Preview tab to display a reference to view.
3. On the toolbar, select the Show All Fields output style from the Output Style list.

The Show All Fields style is not bibliographic, but represents all of the fields in your references. On the Preview tab, scroll through the data in the selected reference.

---

**NOTE:** If Show All Fields is not in the Output Style list, then choose Select Another Style to go to the Choose a Style dialog. Select Show All Fields from the list.

---

## Delete Unwanted References

Because you are working in the Integrated Mode display, references were downloaded directly into the open library. Any references you do not want must be deleted.

---

**NOTE:** If you had downloaded references in Online Search Mode, the references would be in a temporary library; you would need to highlight the references you wanted to keep and copy them into a permanent EndNote library.

---

### To delete references:

1. In the PubMed (NLM) group, select two of the displayed references by holding down the Ctrl key and clicking on the individual references. Use Shift+click to select a range of references.

0	Author ▲	Year	Title	Journal	Ref Type
	Clarkson, E. N.; Levi-Setti, R.	1975	Trilobite eyes and the optics o...	Nature	Journal Article
	Foote, M.; Raup, D. M.	1996	Fossil preservation and the st...	Paleobiology	Journal Article
	Fortey, R.; Chatterton, B.	2003	A Devonian trilobite with an e...	Science	Journal Article
	Fusco, G.; Hughes, N. C.; We...	2004	Exploring developmental mod...	Am Nat	Journal Article
	Gal, J.; Horvath, G.; Clarkson,...	2000	Image formation by bifocal len...	Vision Res	Journal Article
	Horvath, G.	1989	Geometric optics of trilobite e...	Math Biosci	Journal Article
	Hughes, N. C.	2003	Trilobite body patterning and t...	Bioessays	Journal Article
	Knell, R. J.; Fortey, R. A.	2005	Trilobite spines and beetle ho...	Biol Lett	Journal Article
	Lieberman, B. S.; Karim, T. S.	2010	Tracing the trilobite tree from t...	Arthropod Struct D...	Journal Article
	Park, T. Y.; Choi, D. K.	2009	Post-embryonic development ...	Evol Dev	Journal Article
	Sepich, D. S.; Myers, D. C.; ...	2000	Role of the zebrafish trilobite l...	Genesis	Journal Article
	Simpson, A. G.; Hughes, N. ...	2005	Development of the caudal ex...	Evol Dev	Journal Article
	Wagner, P. J.	2000	Exhaustion of morphologic ch...	Evolution	Journal Article
	Webber, A. J.; Hunda, B. R.	2007	Quantitatively comparing mor...	Evolution	Journal Article
	Webster, M.	2007	A Cambrian peak in morphol...	Science	Journal Article
	Webster, M.; Zelditch, M. L.	2011	Modularity of a Cambrian ptyc...	Evol Dev	Journal Article
	Zhang, X. G.; Clarkson, E. N.	2009	Trunk segmentation of Cambr...	Evol Dev	Journal Article
	Zhiyi, Z.; Wenwei, Y.; Zhiqian...	2010	Evolutional trends and palaeo...	Proc Biol Sci	Journal Article
	Zhu, M. Y.; Vannier, J.; Van It...	2004	Direct evidence for predation ...	Proc Biol Sci	Journal Article

2. From the References menu, select Move References to Trash. The selected references are removed from the library and put in the Trash group.

While the references are officially no longer in your library (they will not appear in any other group or reference list, they are not included in your reference count, and they cannot be cited), they are not completely deleted until you go to the References menu and select Empty Trash. Until you select Empty Trash, you can still drag references from the Trash group back to your active library.

3. Because you are sure that you want to delete the references, click the Trash group, and then go to the References menu to select Empty Trash.
4. Confirm the deletion by clicking OK.
5. Click the All References group to return to the full reference list, and on the toolbar, set your output style back to Numbered.

If you wanted to do another search of PubMed, you could display the PubMed group, enter another search strategy, and then click Search again. On the Confirm Online Search dialog, you are asked, "Clear currently displayed results before retrieving records?" This check box simply removes the previous downloaded references from the PubMed group; they still exist in the library. It is an easy way to see just those references downloaded with the current search strategy.

---

## Find the Full Text for a Reference

Many online sources now supply not only bibliographic information, but the full text of the document you are referencing. In this exercise, you will find the full text for a reference.

### To find the full text for a reference:

1. Click in the list of All References and type "Chiu" to jump to the reference by the author Chiu, C.
2. Highlight the reference by Chiu as well as the reference by the author Chang, Kenneth.
3. From the References menu, select Find Full Text > Find Full Text.

EndNote displays a copyright notice advising you to adhere to downloading and usage guidelines as required by your information provider. We will use the default EndNote settings to search public sources that do not require authentication for access.

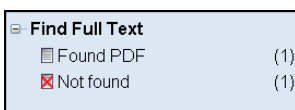
4. Click OK to begin the Find Full Text search.

In the left-hand column, under the Find Full Text group set heading, you will see a Searching group indicating that a search is in progress. This search can work in the background, so if you had many references selected, you could continue working in your library.

When the Find Full Text search is completed, the Searching group is removed. Depending on the results, you may see a combination of three different groups under the Find Full Text heading.

- ◆ Found PDF
- ◆ Found URL
- ◆ Not found

In this case, EndNote was able to locate a PDF file for one of the references.



In the reference list, you can see that the Chiu reference has a paper clip icon next to it indicating an attached file.

Chang, Kenneth	2002	Oldest Bacteria Fossils? Or Are...	New York Times
Chiu, Chen; Moss, Cynthia F.	2007	The role of the external ear in ve...	The Journal of the Acoustical S...
! Chiu, C.; Xian, W.; Moss, C. F.	2008	Flying in silence: Echolocating b...	Proceedings of the National A...
Cioffarelli, Ada; Natale, Maria T...	2000	Guide to the catacombs of Rom...	Percorsi archeologici

Select the Chiu reference in the library window, and then click the PDF & Quick Edit tab to open the PDF in the PDF Viewer pane. See “PDF & Quick Edit Tab” on page 35 to learn more about this feature.

The Chang reference does not have a PDF icon in the File Attachments field.

---

**NOTE:** EndNote did not find a URL for either Chiu or Change. Had Endnote found a URL for either reference, the URL would be added to the URL field. The URL would take you to the provider’s Web site where either the full text article is available or you will find information about how to obtain the full text article.

---

---

## **Related Sections in EndNote Help**

See the following topics in EndNote Help for information related to this portion of the tour:

- ◆ “Searching Online Databases” to learn about establishing connections, searching for references, retrieving references, and finding the full text for a reference.
- ◆ “Troubleshooting” to learn how to resolve problems establishing a connection.
- ◆ “Connection Files” to learn about creating and editing connection files.
- ◆ “Importing References from PubMed” to learn how to import records from the PubMed database.



# Chapter 6: 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 or university catalog, 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 Sample Library

If EndNote is not already running, start it and open the library called `Sample_Library_X5.enl` as shown in "Start EndNote" on page 27.

---

## 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.

Science. 1966 Dec 9;154(3754):1333-1339.

Early Eocene Bat from Wyoming.

Jepsen GL.

A fossil skeleton of an early Eocene bat, the oldest known flying mammal, was found in southwest Wyoming. The bat is assigned to the new species *Icaronycteris index* of the suborder Microchiroptera. It was apparently of a young male whose body was buried in varved marls of the Green River Formation, on the bottom of Fossil Lake, about 50 million years ago. The bones, some as slender as a human hair, show a few "primitive" characteristics such as a clawed

index finger and a complete phalangeal formula, but the bat was fully developed - an anatomically precocious contemporary of the dog-sized polydactylous horse.

PMID: 17770307 [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_result.txt` is provided in the EndNote Examples folder. A single reference in the file appears like this:

```
PMID- 18198331
OWN - NLM
STAT- MEDLINE
DA - 20080116
DCOM- 20080313
LR - 20081121
IS - 0890-9369 (Print)
VI - 22
IP - 2
DP - 2008 Jan 15
TI - Understanding of bat wing evolution takes
    flight.
PG - 121-4
AD - Department of Genetics, Harvard Medical
    School, Boston, MA 02115, USA.
FAU - Cooper, Kimberly L
AU - Cooper KL
FAU - Tabin, Clifford J
AU - Tabin CJ
LA - eng
GR - F32 HD 052349/HD/NICHD NIH HHS/United
    States
GR - R37 HD 32443/HD/NICHD NIH HHS/United States
PT - Comment
PT - Journal Article
PT - Research Support, N.I.H., Extramural
PL - United States
TA - Genes Dev
```



JT - Genes & development  
JID - 8711660  
RN - 0 (Homeodomain Proteins)  
SB - IM  
CON - Genes Dev. 2008 Jan 15;22(2):141-51. PMID:  
18198333  
MH - Animals  
MH - Chiroptera/\*genetics  
MH - \*Evolution  
MH - Forelimb/anatomy & histology  
MH - Fossils  
MH - \*Genetic Variation  
MH - Homeodomain Proteins/\*genetics  
MH - Wing/\*growth & development  
EDAT- 2008/01/17 09:00  
MHDA- 2008/03/14 09:00  
CRDT- 2008/01/17 09:00  
AID - 22/2/121 [pii]  
AID - 10.1101/gad.1639108 [doi]  
PST - ppublish  
SO - Genes Dev. 2008 Jan 15;22(2):121-4.

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 of the data accurately.

---

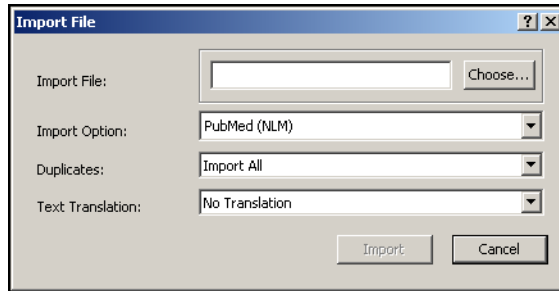
## Choose the Correct Import Filter and Import into EndNote

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 sample library:

1. View the Library window in EndNote.

2. From the File menu, select Import File.



3. Click the Choose button to display a file dialog.
4. Browse to the EndNote X5\Examples folder, and then highlight and open the pubmed\_result.txt file.
5. From the Import Option list, select Other Filters to display the list of filters supplied in the EndNote Filters folder.

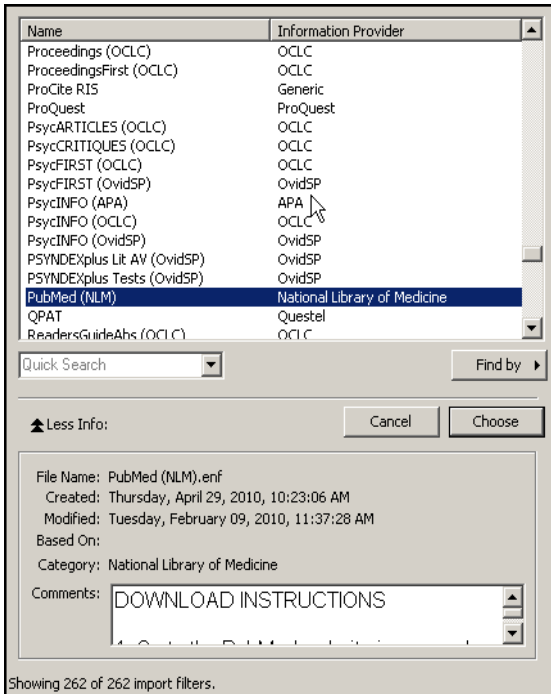
You may want to peruse the list, to get an idea of what filters are supplied. You can create new filters or copy and edit existing filters.

---

**NOTE:** A Typical installation installs only the most popular filters, but there are hundreds available with EndNote.

---

6. Type “PubMed” to jump to the filter in the list.



If the More Info button is available, click it and 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 the Choose button.
8. Leave the other two options at their default settings:

**Duplicates:** Import All

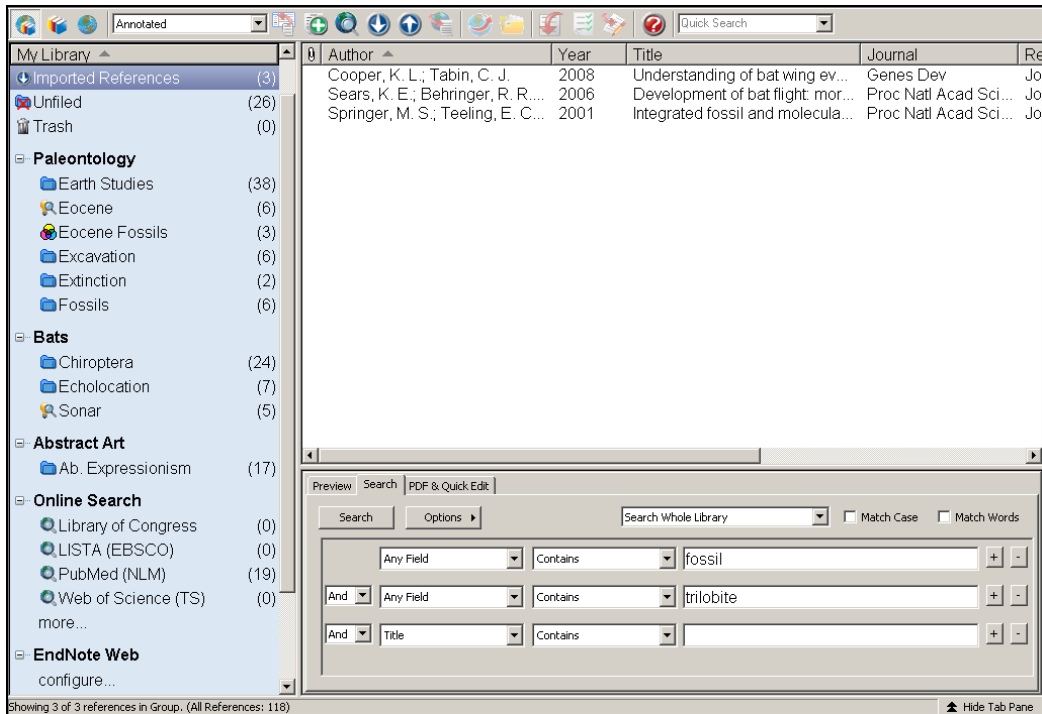
By default, a reference is considered a duplicate if the Author, Year, Title, and Reference Type match a reference already in the library. You can change the duplicates criteria under EndNote Preferences. We will import all references regardless of duplicates.

**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 can also find the correct language encoding information by opening the text file in Microsoft Word or another word processor.

9. Click Import to import the file.

When the process is complete, only newly imported references display in the reference list. This is a good time to peruse the new references to make sure they imported as expected. You can display the Preview tab to view the formatted references, you can open individual references to make sure all information transferred to the correct fields, and you can easily edit or delete the new references.



Notice that the focus in the Groups pane has switched from the All References group to a new Imported References group.

The Imported References group is a temporary group. It is replaced each time you import a new set of references, and it is removed when you close the library. The references themselves remain in the library unless you specifically delete them.

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

---

## Summary of Output Formats and Matching Import Options

A subset of supported information providers are listed here with their recommended output formats. Check this list for guidance in order to download in the appropriate tagged format and select the appropriate import filter. This information was accurate at the time of publication, but you may need to contact your information provider if changes occur. You can also check our Web site at <http://www.endnote.com> for updated information and import filters.

Some of the services listed in this table, such as EBSCO and WilsonWeb, have an alternate, easier way of transferring references into an EndNote library. See “Direct Export from Web Pages” on page 76.

### **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).

## Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
AARP AgeLine ( <a href="http://research.aarp.org/ageline/home.html">http://research.aarp.org/ageline/home.html</a> )	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
ACM Digital Library (Association for Computing Machinery)	<p>Users with subscription access to this Web site can save multiple records to a BINDER. Once saved, you can export the records in an EndNote format.</p> <p>Non-subscribers can download one record at a time:</p> <ol style="list-style-type: none"> <li>1. Create a search.</li> <li>2. Click on an article.</li> <li>3. Scroll half-way down the page and select EndNote under Display Formats.</li> </ol> <p>Limitations:</p> <p>Since only plain text files can be imported into EndNote, you cannot import images and graphics.</p> <p>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.</p>	EndNote Import
CAS SciFinder	Save references in the Tagged Format (*.txt).	SciFinder (CAS) filter
CSA (formerly Cambridge Scientific Abstracts)	<p>From the CSA search results screen, click Save/Print/Email. On the Save/Print/Email screen, select:</p> <p>Record Format: Full Record Save File Format: PC</p> <p>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.</p>	Various filters for CSA databases are provided in the EndNote Filters folder.
Dialog	<p>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".</p> <p>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.</p>	Various Dialog filters are provided in the EndNote Filters folder.

## Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
DIMDI	Use the DLOAD command with report D1 (for example, DLOAD REPORT=D1).	Various DIMDI filters are provided in the EndNote Filters folder.
EBSCOhost	After adding selected references to your folder, click View Folder or Folder has items to see its contents.  On the Folder Content page, click Export. On the Export Manager page, select "Generic bibliographic management software" to save a file to disk. Click Save.	Various EBSCO filters are provided in the EndNote Filters folder.
EDINA	Use the Name format, where data is tagged with words such as "Author" rather than "AU."  Because there are so many different formats used for source data, you may need to manually edit source data after importing.  EndNote cannot parse author names that are not clearly delimited, such as "S Hughes B Reynolds S A Bell & C Gardner." You 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 <a href="http://www.emeraldinsight.com/revs/">http://www.emeraldinsight.com/revs/</a>  Computer Abstracts International Database at <a href="http://www.emeraldinsight.com/caid/">http://www.emeraldinsight.com/caid/</a>  International Civil Engineering Abstracts at <a href="http://www.emeraldinsight.com/icea/">http://www.emeraldinsight.com/icea/</a>  Computer & Communications Security Abstracts at <a href="http://www.emeraldinsight.com/ccsa/">http://www.emeraldinsight.com/ccsa/</a>  Current Awareness Abstracts at <a href="http://www.emeraldinsight.com/caa/">http://www.emeraldinsight.com/caa/</a>  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

## Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
InfoTrac (Gale)	From the E-Mail Delivery panel at the bottom of the marked list window, restrict the contents to Citation. Do not select "full article."  Limitations:  Records often have extraneous information in the title field, which must be removed manually after importing.	InfoTrac (GALE) filter
INIST	<ol style="list-style-type: none"> <li>1. Click the Enregistrer button.</li> <li>2. Select the records you wish to download.</li> <li>3. Under Quels champs? select Tous les champs.</li> <li>4. Under Incluez select "Numéro de notice et nom de la base de données and Libellés abrégés".</li> <li>5. Click the Sauvegarde de notices button.</li> </ol>	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. From the File menu, select Export Selected Documents.	Various Knowledge Finder filters are provided in the EndNote Filters folder.
Medscape	After selecting the desired records and adding them to your clipboard, click the Save or Email Clipboard link. Save or e-mail 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	<ol style="list-style-type: none"> <li>1. Mark the records you wish to download.</li> <li>2. In the navigation pane, click Export.</li> <li>3. Click the radio button next to "The marked records" or "A range of records."</li> <li>4. Click the radio button next to "EndNote."</li> <li>5. Click Export and save to a Text file.</li> </ol>	Various OCLC filters are provided in the EndNote Filters folder.



## Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
Ovid	<ol style="list-style-type: none"> <li>1. After selecting the references you wish to download, click Results Manager.</li> <li>2. Select the following options: Fields: Complete Reference Citation Format: Reprint/Medlars (or Direct Export, if available)</li> <li>3. Click the Email or Save button.</li> <li>4. Save the file as plain text (*.txt).</li> </ol>	The appropriate Ovid filter will be selected automatically when using the <i>Direct Export</i> option. If you are using Ovid's multiple database searching, you must select the <i>Direct Export</i> citation format.
ProQuest	<ol style="list-style-type: none"> <li>1. Select the desired references, and then click the My Research Summary tab.</li> <li>2. Click the Documents and Bibliography tab.</li> <li>3. Select Export, and 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 select the former, make sure your data is displayed in a tagged format before saving as a text file.</li> </ol>	ProQuest filter
PsycINFO	<p><a href="http://www.apa.org/psycinfo">http://www.apa.org/psycinfo</a></p> <p>After marking the records you wish to download, select Full PsycINFO Record, and 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).</p>	Use the PsycINFO (APA) filter.
PubMed	<p>Use this filter to import references from Pub Med.</p> <p>See "Importing Records from PubMed" on page 75 for detailed instructions on how to import records from PubMed.</p>	PubMed (NLM) filter
SilverPlatter WebSPIRS	<ol style="list-style-type: none"> <li>1. Once you've obtained your search results, click Save.</li> <li>2. Select the following Save Records options: Which fields?: All fields Include: Record number and database name Field labels: Short labels.</li> <li>3. Click the Save Records button.</li> <li>4. Use your Web browser to save the page as Text Only.</li> </ol>	Various SilverPlatter filters are provided in the EndNote Filters folder.

## Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
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 e-mail software, save references e-mailed to you as a Plain Text or Text Only file.	UnCover (INGENTA)
VHL (Virtual Health Library)	<ol style="list-style-type: none"> <li>1. After selecting the desired references, scroll to the bottom of the page, and then click Your collection (or "Su selección").</li> <li>2. Cancel the print dialog, and then save the screen as a plain text file.</li> </ol>	Various VHL filters are provided in the EndNote Filters folder.
All Databases Web of Science	<p>Use this filter to import a text file from an All Databases or Web of Science search</p> <p>See "Exporting Records from Web of Knowledge and Web of Science" on page 77 for information on how to directly export records to EndNote.</p>	ISI-CE filter
Wilson	<ol style="list-style-type: none"> <li>1. Click Print Email Save.</li> <li>2. Click Export to Bibliographic Software.</li> <li>3. Select The EndNote Filter, and then click Export.</li> <li>4. Save to a text file.</li> </ol>	WilsonWeb filter
WorldCat (OCLC FirstSearch)	<ol style="list-style-type: none"> <li>1. Mark those references to be saved, and then click Export.</li> <li>2. Select Text File.</li> <li>3. Click Export.</li> </ol>	WorldCat (OCLC) filter

---

## Importing Records from PubMed

The example below gives the recommended download format and import option for the U.S. National Library of Medicine's PubMed system.

**Information Provider: PubMed**  
**Import Option: PubMed (NLM) Filter**

Follow the steps below to download your search results from the PubMed Web site and to import them into your EndNote library.

1. Go to the PubMed Web site in your Web browser at <http://www.pubmed.gov>.
2. In the Search field, enter your search criteria to execute your search. Click the Search button.
3. On the Results page, select Clipboard from the Send To menu in the PubMed navigation bar to save records from multiple searches as you work (optional). You can also click the Add to Clipboard button to save the first 500 results.
4. Select the needed results, and then select File from the Send To menu.
5. Select MEDLINE from the Format menu.
6. Select a sort order from the Sort By menu. The default sort order is Recently Added.
7. Click the Create File button. This will bring up a dialog box allowing you to save your selected references as a text file.
8. Click the Save button to save the file to your computer. Save the file somewhere easily accessible such as your desktop. The default file name is `pubmed_results.txt`. You may change the file name, but we recommend saving the file with the `.txt` extension.
9. In EndNote, open the library where you would like to save these references.
10. From the File menu, select Import > File to open a dialog window.
11. Click the Choose button, and then select the downloaded `pubmed_result.txt` file from your PC.
12. In the Import Option field, select Other Filters, and then select the import filter called PubMed (NLM) from the Choose an Import Filter dialog.
13. Click the Choose button to go to the Import File dialog.
14. Do not make any selections in the Duplicates and Text Translation fields.

15. Click the Import button to import your references.
16. Look in your Groups panel to see a new group called Imported References. All the references that you downloaded from PubMed will appear in this group.

---

**NOTE:** In step 4, do not use File > Save from your browser as the file, along with the results, will not import.

---



---

**NOTE:** In step 7, if you have a popup blocker enabled, such as the one that comes by default from Windows XP Service Pack 2, you may need to disable the popup blocker temporarily to allow the PubMed Web site to send you the file.

---



---

**NOTE:** When you close the current library, EndNote removes the imported records from the Imported References group.

---

## Direct Export from Web Pages

Certain Web sites contain a download button that will send your search results directly to EndNote, pick the correct import filter, and start the import process automatically.

Start by opening 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.

The systems listed below provide a direct export of references into EndNote. A detailed table of instructions can be found in “Direct Export Providers” in EndNote Help. The list keeps growing, so contact your information provider to find out whether they participate!

ALEPH	Los Alamos National Laboratory
American Psychological Association, PsycInfo Online	MicroPatent
Bibliotech.dk	Nature
BioMedCentral	Nerac
BioOne	NISC
Blackwell Synergy	OCLC
BMJ	OhioLink
Buffalo University	OVID
CABI-Direct	OVID SilverPlatter

Canadian Journal of Communication	Oxford Press Journals
CCLR	Pacific Northwest Labs
Delphion	Patent Cafe
EBSCO	PILOTS
EI Engineering	PNAS Online
Elsevier	ProQuest
EMBASE	RLG
ERIC	Science Magazine
ESDS Government	Scopus
Google Scholar	St. John of God, Ireland
HAPI	Stanford University's Highwire Press
IEEE	Teleded
JAMA	Thieme
JISC	Web of Science
JSTOR	WebFeat
Karger Publishing	WilsonWeb

---

## Exporting Records from Web of Knowledge and Web of Science

### Information Providers: Web of Knowledge Web of Science

Go to the *All Databases* or *Web of Science* Search page and perform a search using the Topic, Title, Author, or other fields.

1. From the Results page, click the check boxes to select the records that you wish to export to EndNote.
2. Go to the Output Records section of the page and select the option to output Full Record in step 2.
3. Click the Save to EndNote, RefMan, ProCite button.
4. On the Processing page, click the Export button (Internet Explorer) to export the records to EndNote. If you are using Firefox, select Open With, and then click OK to export the records.

---

**NOTE:** When you install EndNote, the system automatically installs the ISI ResearchSoft - Export Helper plug-in. The plug-in opens a dialog window on the Processing Records page that allows you to select a reference program (if more than one program is installed) and a reference library. If only EndNote is installed, then the system automatically exports the records from *All Databases* or *Web of Science* as explained in step 4 above.

---

---

## Related Sections in EndNote Help

See the following topics in EndNote Help for information related to this portion of the tour:

- ◆ “Importing Reference Data” to learn about import options and about importing references from other bibliographic software programs.
- ◆ “Filters” to learn how to create or modify filters that map downloaded references to corresponding fields in EndNote.
- ◆ “Direct Export Formats and Import Formats” to learn about tables of instruction for importing reference data from various online systems.

# Chapter 7: Searching an EndNote Library and Saving it as a Smart Group

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

- ◆ Search an EndNote library for a set of related references.
- ◆ Save the search strategy to create a smart group that is dynamically updated each time you enter or edit a reference.

## Open the Sample Library

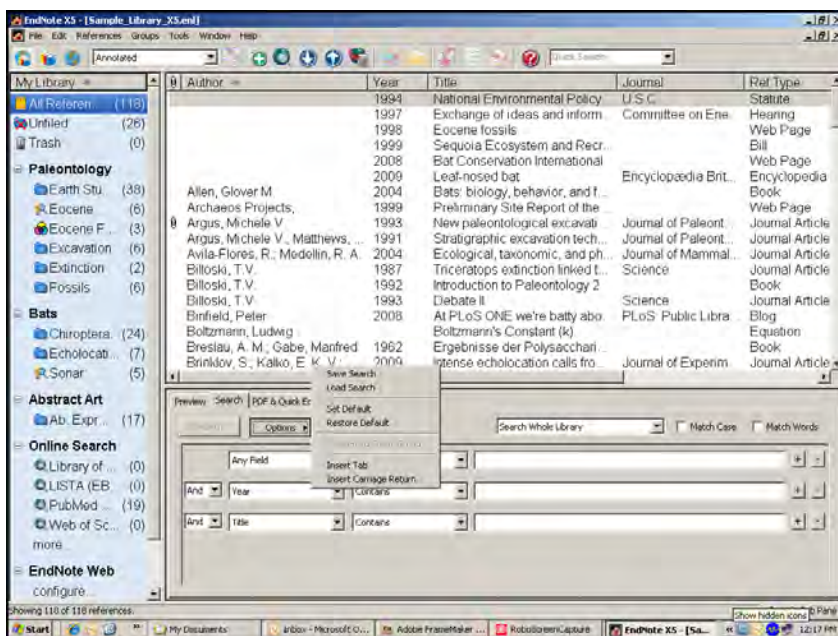
If EndNote is not already running, start it and open the library called Sample\_Library\_X5 as shown in “Start EndNote” on page 27.

## Search for a Set of References

Let us assume that you want to generate a list of all references found in the sample library that are about extinction and that were published from 2000 to 2010.

**To search for references:**

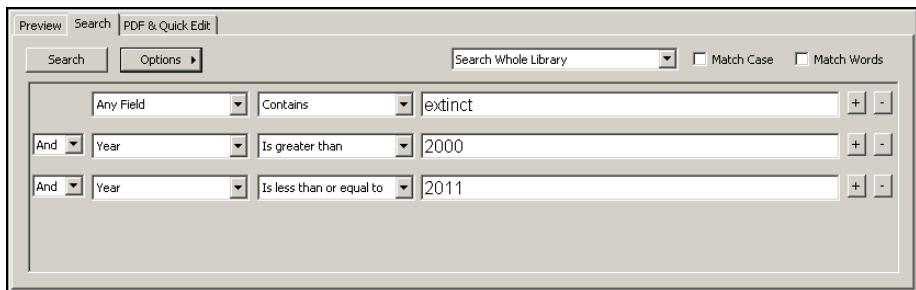
1. Make sure that the All References group is displayed.
2. Click the Search tab.
3. The Search tab remembers the last search you entered. To clear it, click the Options button to select Restore Default.



4. On the first search line:
  - a. In the first drop-down list, the Field list, scroll up and select Any Field. This means that EndNote will search all fields.
  - b. In the next drop-down list, the Comparison list, the Contains comparison operator means that EndNote will search for the string of text anywhere in the field.
  - c. Type “extinct” as the first search term.

Next, set up the search to find references dated from 2000 to 2010.
5. From the Field list in the second search line, select Year; from the Comparison list, select “Is greater than or equal to” and then type “2000” as the search term for the second search line.
6. If you do not have a third search line available, click the plus sign button next to the last search line to insert another line. You can also click and drag the top of the pane to view more of the Search tab.
7. From the Field list in the third search line, select Year; from the Comparison list, select “Is less than or equal to”, and then type “2010” as the search term.
8. Notice the “And, Or, Not” logical operator list at the beginning of each search line. Select the “And” logical operator between the three search lines.

Your Search tab should look like this:



This search will find all references containing the text “extinct” that also were published between 2000 and 2010.

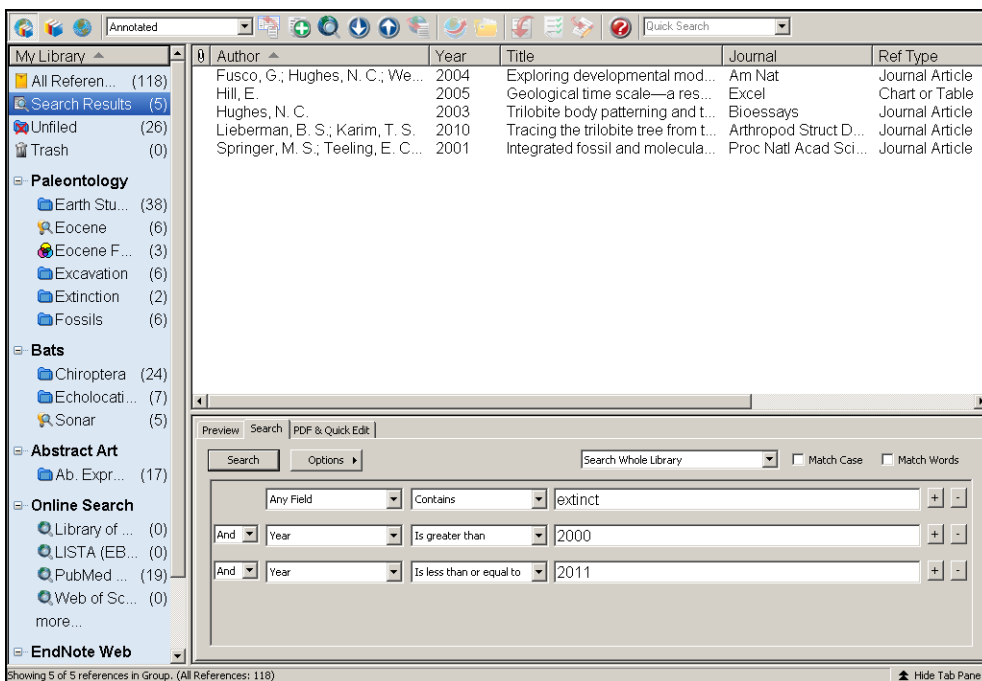
Notice that the following check boxes are not selected for this search:

**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.

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



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.

As you enter additional references into your library, you may want to keep track of the references that meet this search criteria. An easy way to do this is with a smart group as described next.

## Create a Smart Group

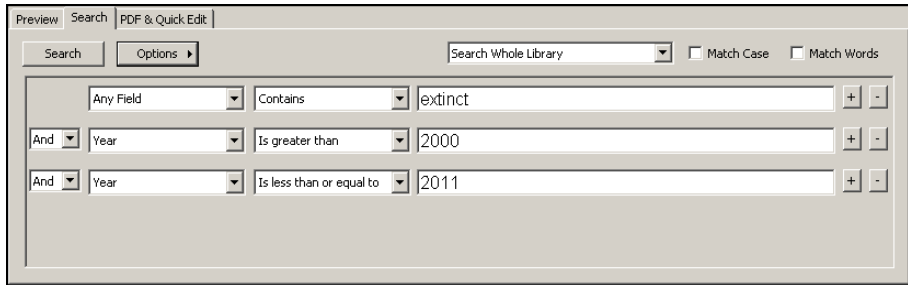
You could create a custom group, and then drag your search results to the group, but as you entered new references into your

library, you would need to manually keep updating the custom group. Instead, create a smart group that updates automatically.

The Search tab should still display the search strategy to find “extinct” and the publication years 2000 to 2010.

### To use the search strategy to create a smart group:

1. Click the Options button and select Convert to Smart Group.



A Converted Search smart group is created under the first custom group set, Paleontology.

2. Type “Extinct” for the Converted Search title, and then press Enter.

If you have already clicked away from the editable title, you can right-click Converted Search, and then select Rename Group.

Each time a reference is added to the library or later edited, the smart group will update as needed.

To show all references again in the library window, click the All References group.

---

## Create a Combo Group

Let us assume that you want to combine all your custom groups and smart groups under the Paleontology group set in order to create a combination group.

### To create a combination group:

1. In the Groups pane, click on any of the groups in the Paleontology group set.
2. From the Groups menu, select Create from Groups.
3. In the Group Name field, type “Paleontology Combo Group.”
4. Go to the Include References In fields. In the first field, select Earth Studies from the Paleontology group set.
5. In the second field, select Eocene, and then select the OR

Boolean operator.

6. In the third field, select Excavation, and then select the OR Boolean operator.
7. Lastly, in the fourth field, select Fossils, but then select the Not operator..
8. Click the Create button to save your changes. Your combo group should appear in the Groups pane.

Paleontology	
Earth Studies	(38)
Eocene	(6)
Eocene Fossils	(3)
Excavation	(6)
Extinction	(2)
Fossils	(6)
<b>Paleontology Combo Group</b>	<b>(44)</b>

Your combined group should contain 44 references from the following custom groups and smart groups.

- ◆ Earth Studies
- ◆ Eocene
- ◆ Excavation
- ◆ Fossils

Notice that your combination group shows six references in the Fossils group. However, because we used the Not operator to exclude references from this group, those references do not appear in the combination group. Moreover, duplicates are excluded from the combination group.

---

**NOTE:** If you delete a reference from a combined group, EndNote removes that reference from the custom and/or smart group from which it originally came. References deleted from a custom group are removed from the group, and from the combo group, but not from the All References list. References deleted from a smart group are removed from the smart group, the combo group, and the All References list, and moved to the Trash group.

---

---

## Related Sections in EndNote Help

See the following topics in EndNote Help for information related to this portion of the tour:

- ◆ “Searching and Sorting in EndNote” to learn more about searching the EndNote library and saving references in groups.
- ◆ “Using Groups” to learn more about creating and managing groups.

# Chapter 8: Using EndNote While Writing a Paper with Microsoft Word

---

**NOTE:** Continue with this part of the tour only if you use Microsoft Word 2003, 2007, or 2010. If you use a different word processor or if you have an older version of Word, see “Cite While You Write Commands (OpenOffice.org Writer)” or “RTF Files/Scanning and Formatting” in EndNote Help 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 in Word 2003 or on an EndNote tab in Word 2007 and 2010 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.

---

## Open the Sample Library

If EndNote is not already running, start it and open the library called Sample\_Library\_X5.enl as show in “Start EndNote” on page 27.

EndNote will look for matching references in the currently open library. 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 font size.

For more information about using manuscript templates, see “Creating a Word Document Based on a Template” in EndNote Help.

## Cite EndNote References

You are going to start entering some text and citations for this tour. This example assumes that your output style is set for Annotated. If not, we will show you how to select an output style in “Select a Bibliographic Style” on page 88.

### To start writing your paper and inserting citations:

1. Open Word, and enter the following text as though you were writing a paper.

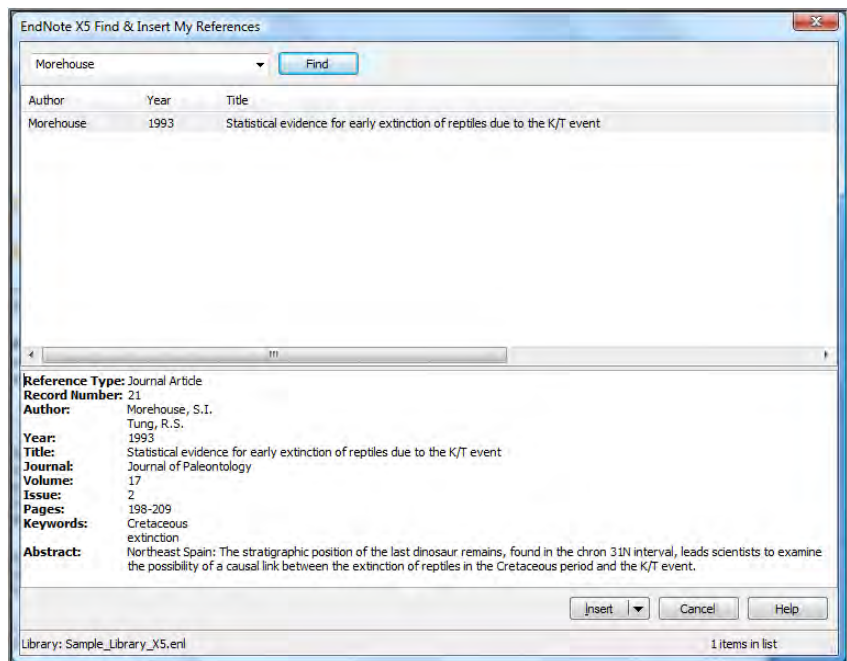
The fossil in question was generally regarded to be the 220 million year-old remains of tyrannosaurus. Several years ago, however, Morehouse overturned this hypothesis with the discovery of yet another species.

Now you are ready to insert a citation.

2. **Word 2003:** From the Tools menu, go to the EndNote X5 submenu, and then click Find Citation(s).

**Word 2007 and 2010:** On the EndNote X5 tab, click the Insert Citation icon.

3. The Find & Insert My References dialog appears. Type the author name “Morehouse” in the text box, and then click Find. EndNote lists the matching references.



- Click the Down Arrow on the Insert button to display a menu. Select the Insert & Display As: Author (Year) option.

EndNote inserts a citation and Instant Formatting formats the citation in the currently selected style and adds it to a formatted bibliography at the end of the paper.

EndNote automatically creates a link from the citation to the bibliography. If you have multiple bibliographies (for example, one at the end of each chapter and one at the end of the document), you can link in-text citations to the reference list at the end of each section and/or chapter. See “Select a Bibliographic Style” on page 88 for information on how to turn this feature on and off.

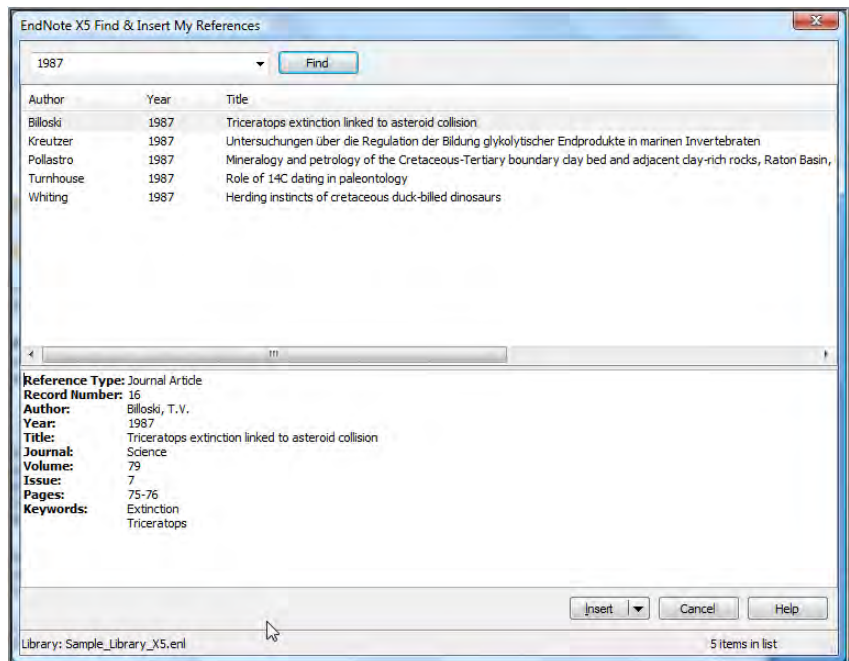
- Add more text to the paper:

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

- Word 2003:** From the Tools menu, go to the EndNote X5 submenu, and then click Find Citation(s).

**Word 2007 and 2010:** On the EndNote X5 tab, click the Insert Citation icon.

- Type the date “1987” into the text box, and then click Find. EndNote searches all fields and lists the matching references.



8. Select the reference by the author Turnhouse.
9. Click the Down Arrow on the Insert button to display a menu. Select the Insert & Display As: Author (Year) option.

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 look similar to this example.

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. Morehouse and Tung (1993) It is now the undisputed progeny of the species at hand. Turnhouse (1987)

Morehouse, S. I. and R. S. Tung (1993). "Statistical evidence for early extinction of reptiles due to the K/T event." *Journal of Paleontology* 17(2): 198-209.

Northeast Spain: The stratigraphic position of the last dinosaur remains, found in the chron 31N interval, leads scientists to examine the possibility of a causal link between the extinction of reptiles in the Cretaceous period and the K/T event.

Turnhouse, M. B. (1987). "Role of 14C dating in paleontology." *Journal of Paleontology* 75(6): 11-15.

9. Assume that you have finished inserting citations in your paper.

Keep your document open in order to select a bibliographic style to continue the tour in "Select a Bibliographic Style" on page 88.

---

**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.

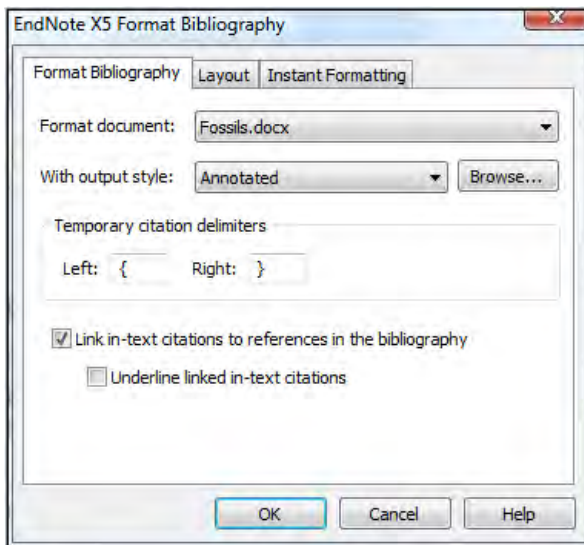
**To select the bibliographic style used for formatting:**

1. **Word 2003:** From Word's Tools menu, go to the EndNote X5 submenu, and then click Format Bibliography.



**Word 2007 and 2010:** On the EndNote X5 tab, in the Bibliography group, click the bottom corner arrow.

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



Styles contain instructions for how EndNote will format citations and the bibliography. Some styles sequentially number citations, and then insert a numbered reference list at the end of the paper. Other styles insert Author-Date citations.

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

2. The Annotated style should appear in the “With output style” field. If not, click the Browse button next to the field, and select the Annotated style.

Note that you can sort the list of styles by Name or by Category by clicking on a column header within the style menu.

3. Click the “Underline linked in-text citations” check box so that our citations within a document are visible.
4. Click OK to leave the Format Bibliography dialog.

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

Your document text should look similar to this example.

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. [Morehouse and Tung \(1993\)](#) It is now the undisputed progeny of the species at hand. [Turnhouse \(1987\)](#)

Morehouse, S. I. and R. S. Tung (1993). "Statistical evidence for early extinction of reptiles due to the K/T event." *Journal of Paleontology* **17**(2): 198-209.

Northeast Spain: The stratigraphic position of the last dinosaur remains, found in the chron 31N interval, leads scientists to examine the possibility of a causal link between the extinction of reptiles in the Cretaceous period and the K/T event.

Turnhouse, M. B. (1987). "Role of 14C dating in paleontology." *Journal of Paleontology* **75**(6): 11-15.

---

**NOTE:** 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, select the Format Bibliography command again. EndNote will reformat the in-text citations and generate a new bibliography based on your changes.

---

---

**NOTE:** More than 4,500 styles are available. A typical EndNote installation includes only the most popular styles in the Styles folder. To see a list of styles currently installed, select Output Styles from the Edit menu in EndNote, and then select Open Style Manager. The Style Manager includes a "Get More on the Web" button to easily locate and download individual styles. You can also install entire categories of styles with the EndNote installation program.

---

## **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, select the Edit & Manage Citation(s) option as described below.

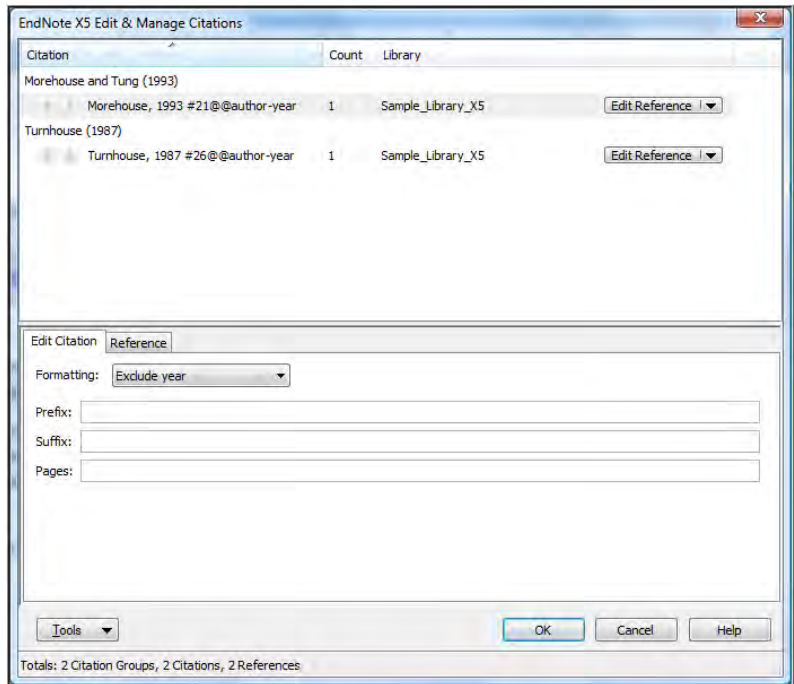
For some bibliographic styles, the majority of references are cited in an "Author, Date" format; but if the author's name is mentioned within the paragraph text, the style dictates that the

name not be repeated in the citation. In our example, we mention Morehouse and the date within the text of the paper.

**To edit an individual citation:**

1. Click anywhere on the Morehouse citation.
2. **Word 2003:** From the Tools menu, go to the EndNote X5 submenu, and then click Edit & Manage Citation(s).

**Word 2007 and 2010:** On the EndNote X5 tab, click Edit & Manage Citation(s).



3. From the Formatting menu, Select the Exclude Year option.
4. Leave the Prefix, Suffix, and Pages fields blank.
5. Click OK to update the citations in your paper.

Your document text should look similar to this example. Note that the date is gone.

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. ([Morehouse and Tung](#)) It is now the undisputed progeny of the species at hand. ([Turnhouse](#))

Morehouse, S. I. and R. S. Tung (1993). "Statistical evidence for early extinction of reptiles due to the K/T event." *Journal of Paleontology* **17**(2): 198-209.

Northeast Spain: The stratigraphic position of the last dinosaur remains, found in the chron 31N interval, leads scientists to examine the possibility of a causal link between the extinction of reptiles in the Cretaceous period and the K/T event.

Turnhouse, M. B. (1987). "Role of 14C dating in paleontology." *Journal of Paleontology* **75**(6): 11-15.

As you are working, remember to often save your document. You can continue adding text and bibliographic citations to the paper, and EndNote will continue adding to the list of references.

This completes the guided tour. You can close Microsoft Word.

---

## Related Sections in EndNote Help

See the following topics in EndNote Help for information related to this portion of the tour:

- ◆ "Microsoft Word/Cite While You Write" to learn about the process of citing references and creating bibliographies.
- ◆ "Bibliographic Styles" to learn about and install output styles.

# Index

## A

AARP AgeLine 70  
ACM Digital Library 70  
All Databases  
    exporting records 77

APA 76  
Arrow keys 30

## B

Bibliographies  
    creating (CWYW) 85  
    reformatting (CWYW) 90  
Bibliotech.dk 76  
BioMed Central 76  
BioMedNet 76  
Blackwell Synergy 76  
BMJ 76  
Buffalo University 76

## C

CABI-Direct 76  
Cambridge Scientific Abstracts 70  
Canadian Journal of Communication 77  
CAS SciFinder 70  
CCLR 77  
Chemistry term list 16  
Citations  
    editing 90  
Cite While You Write  
    checking the installation 21  
    editing citations 90  
    installing 12  
    selecting a style 88  
Close Reference command 34, 49  
Column headers  
    paper clip 50  
Combination groups  
    creating 82  
    deleting references 83  
Compressed library 28  
Connect command 53  
Contact information 7  
Corporate author names 47  
CSA 70

Custom groups 38  
    creating 38  
    deleting 40  
    moving 39  
Custom installation 18

## D

Default library 41  
Delphion 77  
Dialog 70  
Dial-up Internet connection 51  
DIMDI 71  
Direct export from Web pages 76  
Display font 42  
Display modes 52  
Duplicates  
    excluding 67  
    importing 67

## E

EBSCO 77  
EBSCOhost 71  
EDINA 71  
Edit command  
    references 33  
EI Engineering 77  
Elsevier 77  
EMBASE 77  
Emerald 71  
End key 30  
EndNote  
    installing 13  
    new features 9  
    searching a library 79  
    starting 27  
    uninstalling 23, 24  
    uninstalling Word settings 23  
EndNote files  
    downloading files 22  
    updating 22  
    updating files 22  
EndNote preferences 41  
EndNote setup  
    running 13  
EndNote.com  
    EndNote web site 8

ERIC 77  
ESDS 77

## F

File attachments  
    Find Full Text 59  
    locating 50  
Files installed 15  
Find Full Text 59, 60  
FirstSearch 72  
Folders  
    personal 17  
    preferences 17  
    shared 16  
Folders installed 15  
Format Paper feature 13

## G

Gale 72  
Google Scholar 77  
Groups  
    custom 38  
    deleting 40  
    moving 39  
    online search 53

## Guided tour

    creating a smart group 81  
    creating a sticky note 37  
    deleting a custom group 40  
    entering references 45  
    importing references 63  
    previewing references 30  
    saving to a custom group 38  
    searching EndNote 79  
    setting preferences 41  
    sorting references 32  
    using Cite While You Write 85

## H

HAPI 77  
Hardware requirements 11  
Help 8  
Help desk 8  
Help file 3  
Highlighting (See selecting)  
Highwire Press 77  
Holiday closures 8

Home key 30  
Hours 8  
Humanities term list 16

## I

IEEE 77  
Import filters 63  
InfoTrac 72  
Ingenta 74  
INIST 72  
INNOPAC 72  
Installation  
    custom 18  
    files installed 15  
    Windows 11  
Installation procedures 13  
International distributors 8  
Internet address 8  
Internet connection  
    dial-up 51

## J

JAMA 77  
Japanese characters 32  
JSTOR 77

## K

Karger Publishing 77  
Key commands 30  
Knowledge Finder 72

## L

Libraries  
    compatibility 20  
    opening 27  
    opening old versions 20  
    setting a favorite 41  
Library window 29, 81  
    navigating 30  
Los Alamos National Laboratory 76

## M

Manuscript templates 85  
Medical term list 16  
Medscape 72  
Menu  
    Reference Types 46

- MicroPatent 76
- Microsoft Word
  - Add-in Installation 21
  - Cite While You Write Installation 12, 21
  - compatibility 12
  - manuscript templates 85
  - Tools menu 21
- Modems 51
- N
- Nature 76
- NERAC 72, 76
- New features 9
- NISC 76
- O
- OCLC 76
- OCLC FirstSearch 72
- OhioLink 76
- Online database searching 51, 52, 53
- Online help 3
- Online Search 53
- Online search group 53
- OpenOffice.org 12
- OVID 76
- Ovid Technologies 73
- Oxford Press Journals 77
- P
- Pacific Northwest Labs 77
- Page Down key 30
- Page Up key 30
- Paper clip column header 50
- Papers (CWYW)
  - formatting 88
- Patent Cafe 77
- PDF & Quick Edit tab 35
- PDF Viewer pane
  - attaching a PDF file 35
  - floating toolbar 36
- Personal folders 17
- PILOTS 77
- PNAS Online 77
- Preferences 41
  - display font 42
  - setting a favorite library 41
- Product key 14
- Program folder 15
- ProQuest 73, 77
- PsychInfo 76
- PsycInfo 73
- PubMed 73
- PubMed Database 51
- Q
- Quick Edit pane 35
- R
- Records
  - exporting from Web of Knowledge 77
  - exporting from Web of Science 77
- Reference Types menu 46
- Reference window 34, 45
  - moving between fields 34
- References
  - browsing 30
  - closing 34, 49, 55
  - importing 63, 67
  - new 45
  - opening 33
  - previewing 30
  - searching 79
  - selecting 33
  - sorting 32
- Remote database searching 53
- Requirements 11
  - hardware 11
  - Windows 11
- RLG 77
- RTF files 13
  - compatibility 12
- S
- Sales
  - billing 8
- Sales information 8
- Science Magazine 77
- SciFinder 70
- Scopus 77
- Scroll bar 30
- Search tab 54
- Searches
  - guided tour of EndNote searching 79
  - online databases 51

- Serial number 14
- Shared folder 16
- SilverPlatter 73
- Smart groups 81
- Sorting
  - references 32
- St. John of God, Ireland 77
- Stanford University 77
- StarOffice 12
- Sticky notes 37
- STN 74
- Support 8
- System requirements 11
  - Windows 11
  
- T
- Technical support 8
- Telemed 77
- Templates
  - folder 16
- Term lists 16
- Terms folder 16
- Text translation
  - importing 67
- The PDF & Quick Edit tab 35
- Thieme 77
- Thomson Reuters contact information 7
- Tools menu
  - word processing 21
  
- U
- UnCover 74
- Unicode 32
  
- V
- VHL 74
- Virtual Health Library 74
  
- W
- Web of Knowledge 74
  - exporting records 77
- Web of Science 74, 77
  - exporting records 77
- Web site
  - www.endnote.com 8
- WebFeat 77
- WebSPIRS 73
  
- Wilson 74
- WilsonWeb 77
- Window
  - closing 34
  - reference 34
- Word document example 88
- WordPad 12
- WorldCat 74