

# EndNote Class Outline

## Building Your EndNote Library

### 1 Introductions and Overview

#### 1.1 Introductions

#### 1.2 Functions of EndNote

##### 1.2.1 *Bibliography Creation*

EndNote works with your word processor to create formatted bibliographies.

##### 1.2.2 *Reference Organization*

EndNote is a database program to track your references.

##### 1.2.3 *Connectivity with the Online World*

**Internet Search** allows you to search online databases from within EndNote.

**Direct Export** downloads references directly from online databases into EndNote.

**Importing Text Files** allows importing of text files saved from online database searches.

**Capture** using the EndNote Web plug-in for your browser can capture single records.

### 1.3 EndNote Requirements

#### 1.3.1 *Windows (X4)*

- Windows XP SP3, Windows Vista, or Windows 7
- 450 MHz or higher Pentium-class CPU
- 256 MB of available RAM
- 180 MB of free disk space

#### 1.3.2 *Macintosh (X3)*

- OS 10.4–10.5.x
- PowerPC G4 / Intel Mac, 450 MHz or higher (Universal application)
- 256 MB of available RAM
- 180 MB of free disk space

### 1.4 Word Processor Compatibility

#### 1.4.1 *Windows*

- Cite While You Write — Microsoft Word 2003, 2007, or 2010 (32-bit)
- Open Office Writer 3
- Format Paper feature works with any word processor capable of producing rich text format (RTF) documents, and Open Office files saved in the Open Document Type (ODT)

#### 1.4.2 *Macintosh*

- Cite While You Write — Microsoft Word 2004, 2008
- Pages '09

- Format Paper feature works with rich text format (.RTF) documents produced by any word processor

## 1.5 General “Statistics”

- Allows creation of an unlimited number of personal databases (called “libraries” in EndNote)
- Windows and Macintosh libraries are compatible
- Allows an unlimited number of libraries to be open at one time
- Each library can contain an unlimited number of references
- Each record can contain up to 52 fields (e.g., Author, Title, etc.)
- Ships with 45 predefined reference types and 3 unused references types that can be customized to meet your needs

## 1.6 After the Class

### 1.6.1 *The EndNote Getting Started Guide*

You can use the EndNote Getting Started Guide to practice what you have learned. The Getting Started Guide can be found in a PDF file that is included with the paid and trial versions of EndNote.

### 1.6.2 *Technical Support*

Technical Support is free and is available Monday–Friday, 6 a.m. to 5 p.m., Pacific time. You can reach technical support using the *Contact Us* area of our web site or by calling 1-800-336-4474, pressing 4 at the prompt, then selecting the *Research Software* option.

## 2 Creating and Adding Records to an EndNote Library

### 2.1 The Sample Library

The Sample library is placed in the EndNote Examples folder during installation and is used in the exercises in the EndNote Getting Started Guide.

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### 2.2 Customizing the EndNote Preferences

To edit the preferences, on Windows select **Preferences** from the **Edit** menu, on Macintosh select **Preferences** from the **EndNote** menu to the left of the File menu.

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## 2.3 Manually Entering References

Select **New Reference** from the **References** menu to create a new record. \_\_\_\_\_

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### 2.3.1 Selecting the Reference Type

Select the reference type from the pull-down **Reference Type** list at the top of the empty record.

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### 2.3.2 Entering Data

Do not format the data as you enter it if the formatting would apply to the entire field. For example, do not italicize or bold author names or journal names. If formatting applies to only some words or characters in a field, then you can apply that special formatting using the formatting toolbar.

You do not need to enter data in every field. Enter the data that you require for your bibliography or that you wish to track.

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### 2.3.3 Special Fields

**Authors:** Author names can be entered either given name and then last name (e.g., John Robert Smith) or last name, then a comma, then the given name (e.g., Smith, John Robert). Each author must be on a separate line. Add corporate authors with a comma at the end of their name (e.g., University of California,). If you use a name that has been used before in the library, EndNote will try to match it for you.

**Year:** This is not a true date field. It is an alphanumeric sorting field. Enter four-digit years. You can also enter text such as “unpublished” or “in press.”

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**Journal:** EndNote will automatically enter a journal name that matches your typing. When what you are typing no longer matches any journal previously used in the library, the name will turn red. \_\_\_\_\_

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**Pages:** Pages can be entered as a full range of pages (e.g., 125-128) or as a truncated range (e.g., 125-8). EndNote is able to convert the format entered to the format required in the style. \_\_\_\_\_

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**Date:** This is not a true date field. It is a text field and will be shown in your bibliography exactly as entered. Do not include the year here because if your style calls for date information, the year will be pulled from the year field.

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Short Title: If a full-reference footnote style calls for a shortened version of the title in repeated citations, that information will be pulled from the short title field. This field is generally used only in the humanities. \_\_\_\_\_

Alternate Journal: This field is used for the abbreviation of the journal name. \_\_\_\_\_

Keywords: Enter keywords with a semicolon(;), a line break, or a backslash (\) between each keyword. \_\_\_\_\_

URL: You can copy and paste a URL into this field or type it in manually. \_\_\_\_\_

File Attachments: You can attach files or insert links to files on your network or hard drive by selecting **File Attachments**, then **Attach File**, from the **References** menu. The default in EndNote is to attach the file to the record so that it travels with your library. You can change this default on a case-by-case basis during file selection by unmarking the option at the bottom left of the file selection window called *Copy this file to the default file attachment folder and create a relative link*. You can also change the default option in the preferences. \_\_\_\_\_

Figure: This is another way of attaching a file and is normally only used in one of the three references types devoted to tracking information about your graphics. The three types are 1) Chart or Table, 2) Equation, and 3) Figure. To insert a file, select **References > Figure > Attach Figure**, then click on the **Choose File** button and locate the file you want to attach in the Figure field and double-click on it. If the file inserted is a picture you will see a thumbnail image of the picture; if it is an object you will see an icon for the object's file type. There can be only one file linked to the image field per record. \_\_\_\_\_

Caption: This field is tied to the Figure field. When the image is inserted into a Word document, the contents of the caption field will be used as the caption for the image in Word. \_\_\_\_\_

## 2.4 Creating a Library

Select **New** from the **File** menu. You can place your EndNote libraries anywhere you choose on your hard drive or network.

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## 2.5 Online Connectivity—Importing References from Online Databases

### 2.5.1 Online Search—Searching an Online Database from within EndNote



Select the **Online Search** mode from the buttons to the left of the style drop-down list. This will be the third button, as shown here (Windows version shown here).

In the Groups pane on the left, select the connection file you want to use from the favorites list or click on “more...,” which will bring up a list of all installed connection files. Select the database you want to search from the list.

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Using the Online Search mode, references from an online search are retrieved into a temporary EndNote library so you can preview them. After searching, references you wish to keep can be copied to a permanent EndNote library using the **Copy References to** command on the **References** menu.

### 2.5.2 Direct Export

The exact method for using direct export will vary with the data provider you are using. A sample of the data providers that support direct export for at least some of their databases includes: Web of Knowledge (information on Web of Knowledge training options can be found at <http://science.thomsonreuters.com/training/wok/>), Oxford Press Journals, American Psychological Association, BioMedCentral, BMJ, EBSCOHost, EI Engineering Village, EMBASE, Los Alamos National Laboratory, Stanford University's Highwire Press, IEEE, JAMA, ERIC (U.S. Dept. of Education version), Karger Publishing, JSTOR, MicroPatent, NERAC, NISC, OCLC, OVID, PROQUEST, Elsevier, Science Direct Online, Google Scholar, and TIE.

This link provides Direct Export instructions for common data providers:

[http://endnote.com/endnote\\_export.asp](http://endnote.com/endnote_export.asp)

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### 2.5.3 Importing a Text File Saved from an Online Database

All importing uses a pattern matching process where the pattern of the tags in the data is matched against the pattern of the tags in the import filter. It is very important that data be saved in the tagged format that matches the filter that will be used to import it. Below is an example of tagged text. The tags are on the left and the data follows them.

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TI - The Scale and the Feather: A Suggested Evolution
AU - Rex, Tiberius
```

For specific information on how to save data for the database you are using consult the table titled *Output Formats and Corresponding Import Options*. This table is available the online help files (**Help > Contents > Contents tab > Direct Export Formats and Import Formats > Output Formats with Corresponding Import Options**).

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## 2.6 Groups

- You can have up to 500 combined custom and smart groups per library.
  - You can have 500 group sets per library.
  - The same reference can be in multiple groups.
  - Combination groups are a special type of smart group based on a search strategy combining the contents of other custom or smart groups. Select **Groups > Create from Groups** to create a combination group.
    -  Custom groups have a folder icon. You manually add records to a custom group.
    -  Smart groups have a light bulb icon and records are updated automatically by matching the group's search criteria.
    -  Combination groups have a Venn diagram icon and are created by combining other groups.
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## 3 Where to Buy EndNote

- Your university bookstore or computer store.
- Through our web site at <http://www.endnote.com/enpurchase.asp>
- Many national and international resellers.

# EndNote Class Outline

## Using EndNote's Cite While You Write

### 1.1 Journal Names

Some journals require the journal's name be spelled out in full while others require a standardized abbreviation, or vice versa. Some disciplines may even have multiple versions of the standardized abbreviation, such as one with periods after abbreviated words and one without periods. EndNote can substitute one version of a journal's name for another in the formatted bibliography without having to edit each record.

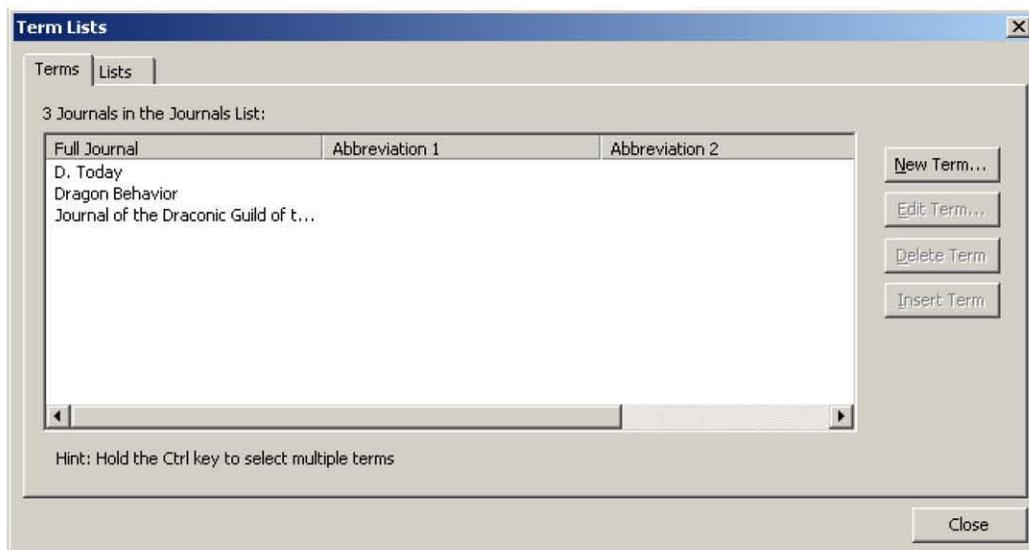
There are two steps to make this work, and they only have to be done once per library.

The first step is to set up a journals term list for your EndNote library.

[Note: There is a video on our training page at [www.endnote.com/training](http://www.endnote.com/training) called *Journal Names* that covers creating a journals term list and editing just the journal name section of the style to do this. This video is also on our YouTube channel at—  
<http://www.youtube.com/watch?v=sOHxEyWv7mw> with closed captions in English, Japanese, Portuguese, and Spanish.]

#### 1.1.1 The Journals Term List

In EndNote, select *Open Term Lists > Journals Term List* from the *Tools* menu. Resize the window so that you can see all the abbreviation columns as in the example below.



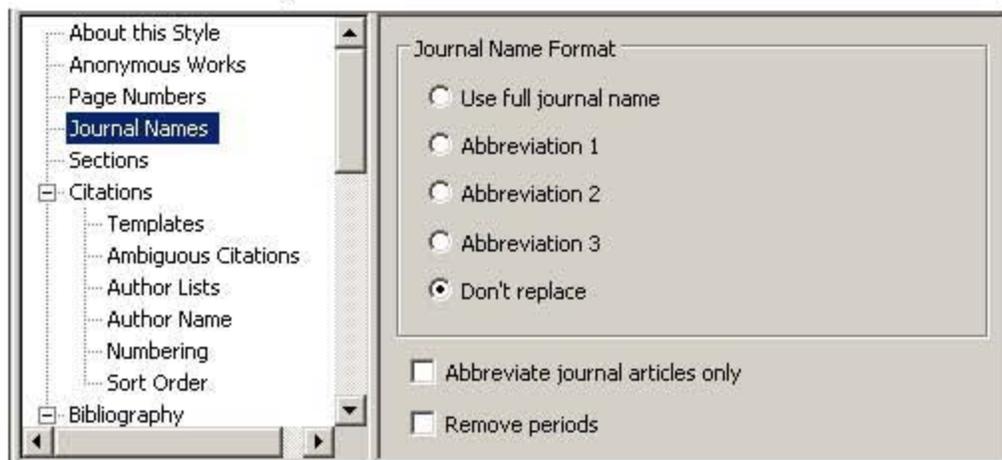
As references are entered into EndNote the contents of the Journal field are added to the Full Journal column in the term list while the contents of the Alternate Journal field are added to the Abbreviation 1 column. If there is only one version of the standardized abbreviation and the full journal, everything you need in this table will be filled in so long as each record entered in the EndNote library contains the full journal name in the Journal field and the standardized abbreviation in the Alternate Journal field. In reality, this is seldom the case. However, it is possible to manually enter the information in the term list, or better yet to import a list of the full names and abbreviation(s) from a tab-delimited file if you have one.

EndNote ships with several predefined tab-delimited files containing full names and standardized abbreviations, including those for the humanities, chemistry, law, the biosciences, and medicine. These lists can be imported into EndNote to create a comprehensive list of journals. To do this—

- Open the Journals term list.
- If there are journals already present, delete them by selecting all the journals present, then selecting the **Delete Term** button. This will ensure that you have no “orphan” journals without complete information or with abbreviations in the Full Journal column.
- Select the **Lists** tab.
- Select **Import List**.
- Locate and double-click on the tab-delimited file you wish to import. The predefined lists that ship with EndNote will be found in the Terms Lists folder within the EndNote folder. The complete list will be imported.
- Make note of the column for the abbreviation or full name that your new style requires.

Close the Term Lists dialog. You can now set the style to use the correct version of the journal name from the journals term list you created.

### 1.1.2 Journal Names in the Style



In the default journal name settings the style will usually be set to *Don't replace*. Change that to the option needed for your style.

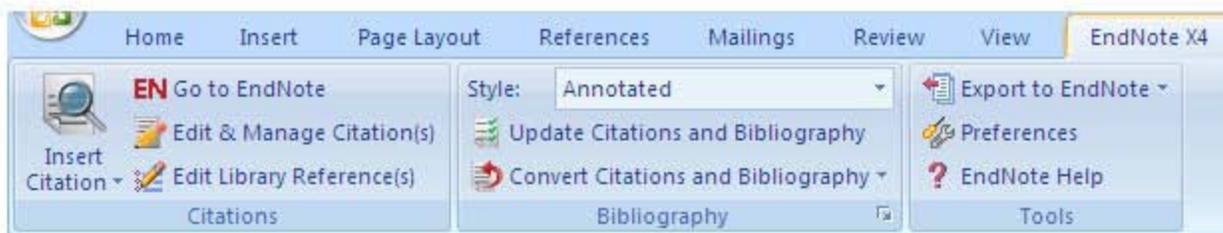
Save the style with a new name by selecting **Save as** from the **File** menu. Your new style will be saved in your *My Documents\EndNote X4\Styles* folder.

## 2 Cite While You Write in Microsoft Word

### 2.1 Installing the Cite While You Write Tools for Word

When you install EndNote it will automatically install files into a common program folder, allowing EndNote and Word to communicate and enabling Cite While You Write (CWYW) in Word. In Word 2003 you should then see an EndNote menu under Word's Tools menu; you may also see an EndNote toolbar in Word. If you do not see the tools, select **Toolbars>EndNote** from the **View** menu in Word to make it visible.

In Word 2007, you will see a tab on the ribbon, as shown here.



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## 2.2 Using the Cite While You Write Tools in Word

### 2.2.1 Go to EndNote **Go to EndNote**

This command will take you to the EndNote program, where you can select (highlight) references for insertion into your Word document. \_\_\_\_\_

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### 2.2.2 **Insert Citation(s)**

This command will provide a search window where you can enter text that is in any field. You can then select references from a list of those that contain your search terms and insert them into your paper. \_\_\_\_\_

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### 2.2.3 Insert Selected Citation(s) **Insert Selected Citation(s)**

This command will insert the references you selected in EndNote into your document at the location of the Word cursor. Click in the lower part of the Insert Citation button to access it. \_\_\_\_\_

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**2.2.4**  **Format Bibliography**

This command will allow you to change the EndNote style used for your document. It will also let you make other changes to the layout of your bibliography, such as adding titles and changing the line spacing. You can access it by clicking on the small arrow at the bottom right corner of the Bibliography group (circled in red above) or through the Tools button in the Edit and Manage Citations window.

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**2.2.5**  **Style (Only Available in Word 2007)**

If you simply want to change the style, without changing any of the other options available in the Format Bibliography command, the Style drop-down list will allow you to do so.

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**2.2.6**  **Edit and Manage Citation(s)**

Use this command to make any changes inside a citation, such as adding page numbers or removing author names from author-date citations.

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**2.2.7**  **Insert Note**

Use this command to insert explanatory notes to be numbered as though they were bibliography entries, and then placed in the bibliography. Click in the lower part of the Insert Citation button to access it.

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**2.2.8**  **Edit Library Reference(s)**

This command allows you to quickly access the specific record for any selected citation.

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### 2.2.9 Convert to Unformatted Citations **Convert to Unformatted Citations**

This command will remove the formatted bibliography and citations and replace all citations with plain-text placeholders that EndNote can match to library records to create formatted citations. This command is commonly used when moving documents between word-processing programs. You can access it by clicking on the Convert Citations and Bibliography drop-down list. \_\_\_\_\_

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### 2.2.10 Convert to Plain Text **Convert to Plain Text / Remove Field Codes**

This command will create a second copy of the document with all EndNote field coding removed (you can generally recognize field codes such as formatted EndNote citations by their turning grey when you select them in Word). It is used when sending documents to a publisher because the field coding used for EndNote citations can sometimes cause problems for publishers' page layout programs. You can access it by clicking on the Convert Citations and Bibliography drop-down list. \_\_\_\_\_

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### 2.2.11 Export Traveling Library **Export Traveling Library**

EndNote creates a hidden "traveling" library containing only the references used in each paper. This traveling library is part of the coded information contained in each citation. Use this command to export the references in this traveling library to a regular EndNote library. You can access it by clicking on the Export to EndNote drop-down list. \_\_\_\_\_

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### 2.2.12 Find Figure... **Find Figure(s)**

This command will provide a search window much like the Find Citation window where you can enter text that is in any field in the record you want to find. You can then select references from a list of those records with figures attached that contain your search terms. A reference to the figure will be inserted at the location of your cursor. The image will be inserted either below the cursor location or in a list at the end of the document, depending on the selected EndNote style. \_\_\_\_\_

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### 2.2.13 Update Citations and Bibliography **Update Citations / Generate Figure List**

If you insert a new figure reference, all of the figures in the document will automatically be updated, but if you delete or move a figure reference you will need to force an update of the figure numbering and placement. Use the Generate Figure List command to do this. \_\_\_\_\_

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### 2.2.14 Preferences **Cite While You Write Preferences**

Use this command to set preferences for EndNote's cite while you write settings for future documents and to switch between using EndNote or EndNote Web libraries in your document.

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### 2.2.15 EndNote Help **Help**

This command will let you access contextual help for EndNote. \_\_\_\_\_

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## 3 Using Cite While You Write in Open Office Writer (Optional Section)

### 3.1 Installing the Cite While You Write Tools in Open Office Writer

After installing EndNote you should see an EndNote menu under Writer's Tools menu and an EndNote toolbar. Please note that Open Office, including the Open Office Quickstart program, must be completely quit during installation for the EndNote tools to install properly.

### 3.2 Using the Cite While You Write Tools in Open Office Writer

#### 3.2.1 **Go to EndNote**

This command will take you to the EndNote program, where you can select (highlight) references for insertion into your Word document. \_\_\_\_\_

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#### 3.2.2 **Find Citation**

This command will provide a search window where you can enter text that is in any field. You can then select references from a list of those that contain your search terms and insert them into your paper. \_\_\_\_\_

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### 3.2.3 **Format Bibliography**

This command will allow you to select the EndNote style used for your document. \_\_\_\_\_

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### 3.2.4 **Insert Selected Citation**

This command will insert the references you selected in EndNote into your document at the location of the Word cursor. \_\_\_\_\_

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### 3.2.5 **Edit Citation**

Use this command to make any changes inside a citation, such as adding page numbers or removing author names from author-date citations. \_\_\_\_\_

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### 3.2.6 **Unformat Citations**

This command will remove the formatted bibliography and citations and replace all citations with plain-text placeholders that EndNote can match to library records to create formatted citations. This command is commonly used when moving documents between word-processing programs. \_\_\_\_\_

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### 3.2.7 **Cite While You Write Preferences**

Use this option to select if you want EndNote to automatically open and close whenever you open or close Open Office Writer. \_\_\_\_\_

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### 3.2.8 **Cite While You Write Help**

Use this command to access the Help files. \_\_\_\_\_

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## 4 **Where to Buy EndNote**

- Your university bookstore or computer store.
- Through our web site at <http://www.endnote.com/enpurchase.asp>
- Many national and international resellers.