EndNote X1

...Bibliographies Made Easy™

Search bibliographic databases on the Internet
Organize references, images and PDFs in a snap
Construct your paper with built-in templates
Watch your bibliography, table and figure lists appear as you write!

Getting Started Guide

THOMSON™

EndNote®

Version X1 for Macintosh and Windows

Contents

Start EndNote, open a reference library, sort the library, select, open, and close a reference, and save references to a group.

Learn how to access EndNote preferences, how to set a default library to open automatically, and how to change the display fonts.

Manually insert a reference, and attach files to the reference.

Use EndNote to search remote databases and library catalogs available online. This feature requires that you have a connection to the Internet.

Import a tagged text file of references downloaded from an online database or CD-ROM.

Search for references and preview a formatted bibliography in EndNote.

Learn how to insert bibliographic, figure, and table citations in a Word document, and have EndNote generate bibliography, figure, and table lists for the paper. (For other word processors, see *Scanning and Formatting RTF Files* in the EndNote Help file.)

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 Macintosh or Windows operating system. For help on these topics, consult your computer guide or your word processor manual.

For additional information about using EndNote, consult the full EndNote.PDF manual found in your EndNote folder or the online help. From EndNote's *Help* menu, select *EndNote Help* (Macintosh) or *Contents* (Windows) to view help topics. While using EndNote, press the Help key (Macintosh) or F1 key (Windows) to view a help topic about the current window.

Introduction: Welcome to EndNote

Introducing EndNote

Welcome to EndNote—the complete reference solution!

♦ EndNote is an online search tool—it provides a simple way to search online bibliographic databases and retrieve the references directly into EndNote. (EndNote can also import data files saved from a variety of online services, CD-ROMs, and library databases.)

♦ EndNote is a reference and image database—it specializes in storing, managing, and searching for bibliographic references in your private reference library. You can organize images—including charts, tables, figures, and equations—and assign each image its own caption and keywords.

♦ EndNote is a bibliography and manuscript maker—it formats citations, figures, and tables in Microsoft® Word with the Cite While You Write™ feature. Watch the reference, figure, and table lists grow as you insert citations in your manuscript. Microsoft Word templates guide you through the exacting manuscript requirements of publishers.

You can also create bibliographies using Format Paper with other word processors that can save files as RTF.

See "What's New in EndNote X1" on page 10 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 Demo Version of EndNote and the EndNote Viewer

If you are working with the demonstration version of EndNote X1, you have 30 days after you first use the program to evaluate EndNote and all of its features. After those 30 days are up, the Demo version will revert 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 demo 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 still will be able to 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, please contact Thomson ResearchSoft.

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 Macintosh or Windows operating system and your word processor. For help on these topics, consult your computer owner's guide or your word processor manual.

Because this guide serves both Macintosh and Windows users, screen representations alternate between the Macintosh and Windows versions. While the two platforms are essentially the same, there may be slight differences between the pictures shown in this guide and the windows that appear on your computer screen.

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 CONTROL+click (Macintosh) or right-click (Windows) menu, from a toolbar, 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:

Macintosh

Instruction	Explanation
⌘+O	While holding down the ⌘ (COMMAND) key, press the O key.
⌘+SHIFT+T	While holding down the ⌘ (COMMAND) and SHIFT keys, press T.

Windows

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

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

Customer Services

Register Your Copy of EndNote

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

♦ free technical support

♦ special upgrade offers

♦ notification of new EndNote versions that are compatible with the latest version of your word processor

The EndNote Manual and Online Help

The EndNote Manual: The complete EndNote manual is available as a PDF file, and is installed in your EndNote folder.

Online Help: The online Help file is another source of information about EndNote. From EndNote's *Help* menu, select *EndNote Help* (Macintosh) or *Contents* (Windows) to view the various topics. For context-sensitive help, click the *Help* or *?* button found on various windows and dialogs, or press the HELP key (Macintosh) or F1 key (Windows) on your keyboard.

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

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

Customer Service

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

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

Sales Information

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

Customer Service (Orders, Billing, and Shipping)

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

Technical Support

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

Web/Email/Phone: http://www.endnote.com/encontact.asp

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

Technical support tips are also available from the EndNote Web site and the endnote-interest email forum (see the sections that follow in this manual).

International Customer and Technical Support

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

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

The EndNote Web Site

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

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

The *EndNote-Interest* Email Forum

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

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

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

ADA VPAT

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

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

government to help facilitate the understanding of compatibility issues under Section 508.

What's New in EndNote X1

EndNote X1 includes these new and enhanced features:

♦ (Windows) Use Microsoft Word 2007 to Cite While You Write. See Chapter 10, "Using EndNote with Microsoft Word" in the full EndNote manual.

♦ (Windows) The new Cite While You Write add-in for Word eliminates conflicts with other add-ins such as Snag-it and FlashPaper.

♦ Use Groups to view and manage subsets of references in your library. See "Using Groups" in Chapter 8 of the full EndNote manual.

♦ Display multiple author names for each reference in the library reference list. See "Display Fields" in Chapter 18 of the full EndNote manual.

♦ Use the Display Fonts preference to select your choice of font and size for the Library window, General text that you enter, Search text, and Field labels. See "Display Fonts" in Chapter 18 of the full EndNote manual.

♦ Export your custom Reference Type table to easily share it with another EndNote user. See "Sharing Your Reference Type Table" in Chapter 14 of the full EndNote manual.

♦ Convert ProCite databases to EndNote Libraries. See "Creating a Library from ProCite" in Chapter 4 of the full EndNote manual.

♦ (Macintosh) Spell check a single reference or your entire library with the Mac OS spell checker. Easily convert older custom dictionaries to the Mac OS spell checker format with the provided Dictionary Converter. See "Spell Checking" in Chapter 5 of the full EndNote manual.

♦ (Macintosh) Scan and format OpenOffice ODT documents as well as RTF files with the *Format Paper* command. See Chapter 11, "Scanning and Formatting Files" in the full EndNote manual.

♦ (Macintosh) Use AppleScript to automate repetitive tasks.

Chapter 1: Macintosh EndNote Installation

Before You Install EndNote

Please read this section before you proceed with the installation.

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 serial number.

Program Requirements

The EndNote Demo is available on CD or by downloading. If you have the CD, you need a CD-ROM drive to install the program.

System Requirements

EndNote runs under the Macintosh operating system versions 10.3.9+ and 10.4.x.

In the Finder, choose *About This Mac* from the *Apple* menu to find your system version.

See the readme file or our Web site at http://www.endnote.com for the latest compatibility information about EndNote and released Apple operating systems.

Hardware Requirements

EndNote requires the following hardware:

♦   At least a Power Macintosh G4, 450 MHz or higher

♦   A hard drive with at least 180 MB of free space

♦   A minimum of 256 MB of available memory (RAM)

♦   In order to use EndNote's *Connect* command, an Internet connection is required. To use the *Open Link* command to access a Web site, you also need a web browser installed.

NOTE: Make sure that your computer meets the system and hardware requirements before continuing. If necessary, contact the distributor, dealer, or store where you purchased EndNote to arrange for a full refund. If you have any problem obtaining a refund, contact Thomson ResearchSoft directly. You must do so within 30 days of purchase.

Word Processor Compatibility

As of August 2007, EndNote for Macintosh is compatible with:

♦ Microsoft Word X and 2004

♦ RTF files created with most word processors, including: WordPerfect, OpenOffice, and FrameMaker

♦ ODT files created with OpenOffice.

Cite While You Write in Microsoft Word

EndNote's Cite While You Write commands are available for Microsoft Word X and 2004.

These Cite While You Write functions put an EndNote submenu of commands on Word's *Tools* menu. They also allow EndNote to format citations and create a bibliography for the document that is open in Word. You can format, unformat, and reformat a single document—without ever exiting your word processor.

If Microsoft Word X or 2004 is installed on your computer, the appropriate Cite While You Write files are installed automatically when you run the EndNote installation.

Keep in mind that in order for Cite While You Write to install properly:

♦ Microsoft Office X must include the latest update, which is available from the Microsoft Web site at http://www.microsoft.com.

♦ Microsoft Word must be correctly installed on your computer *prior to* installing EndNote.

♦ The Microsoft Word application must be closed during the installation of EndNote.

♦ The EndNote installer must be able to locate the Word startup folder. You need to have full read and write access to Word's startup folder in order to install EndNote commands.

RTF and ODT Documents

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

EndNote for Palm OS Requirements

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

Requirements for running EndNote for the Palm Operating System include:

- ♦ Handheld device
- ♦ Palm Operating System 4.x or later
- ♦ Serial or USB communication for HotSync operations
- ♦ At least 16 MB RAM

For information about how to use EndNote for Palm OS on your Palm handheld device, see the EndNote Help file. In EndNote, go to the *Help* menu and choose *EndNote Help*. See the Help topics in the "EndNote for Palm OS Handhelds" book.

Installing EndNote

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 17 before installing EndNote X1.

If you have purchased a Volume/Site License version of EndNote, please see Chapter 21, "Using EndNote On a Network" in the full EndNote manual for installation information.

To install EndNote:

1. Make sure no applications are running—including virus protection software and Microsoft Word.

2. Start the EndNote installation program.

   If you downloaded the EndNote installer: Double click the disk image to display an EndNote X1 folder.

   If you received EndNote on a CD: Insert the EndNote CD into your CD-ROM drive. If the installer does not launch immediately, double click the EndNote X1 Installer to display an EndNote X1 folder.

3. Drag the EndNote X1 folder to the Applications folder on your hard drive.

NOTE: The EndNote folder must reside in the Applications folder in order to use the *Services* menu from EndNote and in order to use Spotlight searching.

---

4. Double click on the Applications folder, then the EndNote X1 folder, then the EndNote X1 application icon in order to launch EndNote and a Customizer program.

5. Follow the instructions on the screen to complete the installation. Use the *Next* button to move forward as needed through the installation dialogs:

Welcome: Thank you for purchasing EndNote!

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

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

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

Personalize EndNote: Enter your name and organization.

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

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

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

Product Registration: Please register your copy of EndNote!

The Customizer automatically installs Cite While You Write files for Microsoft Word X or 2004 if one of them is found on your computer. If you have both versions of Word installed, Cite While You Write installs for Word 2004.

The Customizer also looks for Palm software, and if found, will install EndNote for Palm OS. For more information about installing EndNote for Palm OS, see "Installing EndNote for Palm OS" in the full EndNote manual.

To make sure the EndNote program installed correctly, see "Checking Your Installation" on page 20.

NOTE: If you use a non-English version of Word, see page 21.

Installed Files

The EndNote installation includes:

♦ *EndNote X1* application
The application includes the Help file. Select *EndNote X1 Help* from EndNote's *Help* menu. Pressing the HELP key on your keyboard or clicking a *Help* or *?* button in the program brings up a context-sensitive topic.

♦ *Readme.txt* text file containing late-breaking news

♦ *EndNote.pdf* full electronic manual

♦ *GettingStartedGuide.pdf* is an electronic version of this guide, which gives installation instructions and a tour of the program

♦ *Examples* folder
This folder contains example files to follow the guided tour presented in this manual and Chapter 3 of the User's Guide, and to experiment with while learning EndNote.

♦ *Styles* folder
This folder contains the full collection of over 2,800 bibliographic formats (styles).

♦ *Connections* folder
This folder contains hundreds of connection files to connect to and search online bibliographic databases.

♦ *Filters* folder
This folder contains hundreds of import filters used when importing text files downloaded from online bibliographic databases.

♦ *Terms* folder
This folder contains several journal abbreviation term lists, including Chemical, Medical, and Humanities. 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 a dictionary converter so you can use custom dictionaries created with older versions of EndNote.

♦ *Cite While You Write* folder
This folder contains the Cite While You Write files for Microsoft Word X and 2004. They integrate EndNote commands into Word's *Tools* menu.

♦ *Templates* folder
This folder contains Microsoft Word templates to accurately and quickly set up your papers for electronic submission to publishers.

♦ *Services* folder
This folder supplies Format Paper commands for the *Services* menu of other software applications. Use these commands to format bibliographic references in RTF files and ODT files.

♦ *Palm* folder
This folder contains a Palm Read Me file and Palm installer files to allow the Customizer to install EndNote for Palm OS, which allows you to keep an EndNote library on a Palm handheld device.

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

Custom Installation

First, install the full EndNote program, as described under "Installing EndNote" on page 13.

Installing with the EndNote Customizer

You can use the EndNote Customizer to install, reinstall, or remove specific components after the EndNote program has already been installed.

Cite While You Write: If you install Microsoft Word *after* installing EndNote, you will need to install Cite While You Write files. Close Word before installing the files.

Palm: If you install Palm software *after* installing EndNote, you will need to install the Palm Plug-in in order to use an EndNote library on your handheld device.

Services: You can install Services in order to use Format Paper to insert and format references in an RTF file or an OpenDocument ODT file.

Templates: Install templates to copy Microsoft Word templates into the appropriate Word folder.

To do a custom installation:

1. Make sure no applications are running—including virus protection software and Microsoft Word.

2. Start the EndNote program.

3. From the *EndNote* menu, choose *Customizer*.

4. On "Component Selection" dialog, select the components you want to install (or keep installed) and click *Next*.

Copying Content Files

If you want to copy original content files again, you can drag the appropriate folder from your installation CD or disk image to your EndNote X1 folder:

♦ *Examples* folder

♦ *Styles* folder

♦ *Connections* folder

♦ *Filters* folder

♦ *Terms* folder

For a description of these folders, see "Installed Files" on page 15.

If you want to replace a single file, copy it from the installation CD or disk image to the appropriate folder in your EndNote X1 folder.

Removing Extraneous Files

If you want to free up disk space, or simply want to limit the options available, you can delete individual example files, styles, connection files, filters, term lists, and spell check dictionaries. You can later restore these files by copying them from your installation CD or disk image.

Upgrading from an Earlier EndNote Version

While it is not strictly required, we recommend that you uninstall older versions of EndNote before installing your new version of EndNote.

First, back up your files:

Before you begin, it is important to back up your EndNote libraries (including corresponding .DATA folders), custom styles, import filters, connection files, and spell check dictionaries, as well as any Word documents that use Cite While You Write.

Then, uninstall the older version of EndNote:

1. Start the older version.

2. From the *EndNote* menu, select *Customizer*.

3. Select all of the options and click *Uninstall*.

4. Click *Next* and follow the prompts.

5. Drag the entire EndNote folder to the trash.

Next, install the new EndNote X1:

Install the upgrade just as you would a new installation. See "Installing EndNote" on page 13. During installation, you will need to enter both your new EndNote X1 product key and your old EndNote serial number. EndNote X1 is installed into a new EndNote X1 folder.

After installing EndNote X1, you may have two folders, with each containing EndNote files. Copy your libraries from your old EndNote folder to your new EndNote X1 folder.

If you have backed up customized styles, filters, or connection files, you should also copy them to the Styles, Filters, or Connections folders in the EndNote X1 folder. EndNote X1 includes a full collection of updated files, so unless you have specially customized a file for your needs, there is no reason to copy the old files.

To copy custom dictionaries from the old version of EndNote to the new Mac OS spell checker, see "Importing Dictionaries" in Chapter 6 of the full EndNote manual.

Once you have copied your customized files and libraries to the EndNote X1 folder, and EndNote X1 is up and running, you can drag any remaining items in the old EndNote folder to the Trash. Be careful not to delete any libraries, papers, or other items that you need.

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

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

NOTE: To see what features have been added to EndNote, see "What's New in EndNote X1" on page 10.

Cite While You Write Users

If you have a Microsoft Word document that was formatted with an earlier version of EndNote, we recommend that you first make a backup of the file.

If the file was created with EndNote 5-X, use the new version of EndNote to format the document again. From Word's *Tools* menu, choose *EndNote X1* and then *Format Bibliography*. This updates the document to work with EndNote X1.

If the file was originally created with an even older version of EndNote, you will need to unformat the citations with the old version of Word and the original EndNote Add-in before the document can be used by EndNote X1. If you no longer have access to the older version of Word or the old EndNote Add-in for Word, please contact Technical Support.

Opening and Converting Old EndNote Libraries

EndNote X1 automatically converts libraries created with earlier versions of Endnote (versions 5, 6, or 7) to the version 8/9/X/X1 format.

To convert an older EndNote library:

1. Start EndNote.

2. From the *File* menu, select *Open* and then *Open Library*.

3. On the file dialog, locate and highlight the old library, and click *Open*.

    EndNote will warn that the selected library was created with an older version, and will ask for permission to convert it.

4. Click *OK* to convert the library. Name the new library and click *Save*. The conversion makes a *copy* of the original library in the version 8/9/X/X1 format, and leaves the original library intact.

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

Using Old Style, Filter, and Connection Files

You may have created custom content files with an earlier version of EndNote. EndNote X1 can use your custom styles, filters, and connection files that were created with EndNote versions 4.03-8. Once you edit and save one of these files with EndNote X1, it is converted to the version 8/9/X/X1 format.

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

Customized reference types, temporary citation markers, and display fonts are all carried over from earlier versions of EndNote for use with EndNote X1.

Checking Your Installation

To run EndNote, double click the EndNote X1 icon found in the EndNote X1 folder.
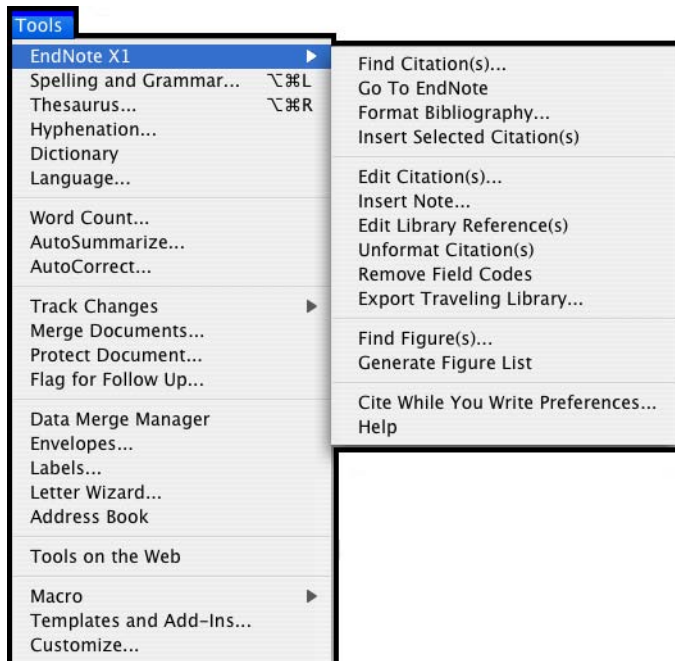

EndNote X1

A dialog will ask you to open a reference library file. Choose *Cancel*.

To check the EndNote version number, go to the *EndNote* menu and choose *About EndNote*. Click the splash screen to clear it.

Checking Support for Microsoft Word

To see whether Cite While You Write is correctly installed, start Word and click on the *Tools* menu. You should see EndNote's Cite While You Write commands on an *EndNote X1* submenu in Word.

EndNote X1 submenu on the Tools menu in Word X or 2004

If you do not see these commands, Word support was not correctly installed. Most likely, the installer could not find the correct folder location to install the Cite While You Write files. You can try to reinstall EndNote. You may need to install the files manually as described under "Manually Installing Support for Word X or 2004" on page 21.

Non-English Versions of Word

The EndNote installer uses English terms for the various target folders in the installation (such as "Word Startup Folder"). If you are running a version of Word localized for a different language, you may need to install Word support manually as described below.

Manually Installing Support for Word X or 2004

If you install Microsoft Word X or 2004 *after* installing EndNote X1, or if you have a customized startup folder for Word, you should either reinstall EndNote or do a Custom Installation to copy just the Cite While You Write files.

However, there may be a case where you need to install Cite While You Write support manually.

First, determine the path of Word's Startup Folder:

Word normally uses a default startup folder. For example:

```
Microsoft Office X:Office:Startup:Word
```

or

```
Microsoft Office 2004:Office:Startup:Word
```

However, Word's startup folder location could have been changed. If you are unsure which startup location is being used, or to change the startup location:

1. Start Microsoft Word.

2. From the *Word* menu, choose *Preferences*.

3. Select the File Locations item and look at the "Startup" line to see the path for the designated startup folder.

4. If the Startup line is blank, or if you would like to change the startup folder location, select the Startup line, click *Modify*, select the desired folder, and save your changes.

5. Quit from Word. This step is important!

Next, create aliases of the Cite While You Write files:

From this folder:

```
EndNote X1:Cite While You Write
```

use the *File>Make Alias* command from the Finder to create aliases of these files:

```
EndNote X1 CWYW Commands.dot (Word X and 2004)
```

   and

```
EndNote CWYW Word X (Word X) or
EndNote CWYW Word 2004 (Word 2004)
```

Then, copy the aliases to Word's Startup Folder:

Make sure the alias files have the same names as the original files, and copy the aliases to Word's Startup Folder.

NOTE: Word 2004 will use startup information found in *both* the default startup folder *and* any startup folder you indicate under *Preferences*.

Check your installation as described under "Checking Support for Microsoft Word" on page 20.

To manually copy EndNote Template files to the Word Templates folder:

1. In the Finder, navigate to your EndNote X1:Templates folder.

2. Use the *File>Make Alias* command from the Finder to create aliases of the files.

3. Cut the alias template files from this Templates folder.

4. Navigate to your Microsoft/Word/Templates folder.

5. Create a new folder called EndNote.

6. Paste the alias files into the new EndNote folder.

You do not need to manually install the EndNote Manuscript Template wizard. The Manuscript Template wizard is invoked by opening a template file through Word's Project Gallery or by selecting EndNote's *Tools>Manuscript Templates* menu item.

Updating EndNote Files

You can update EndNote X1 with free incremental program enhancements, including the latest output styles, filters, and connection files.

To update your copy of EndNote:

1. Open a connection to the Internet.

2. From EndNote's *Help* menu, select *EndNote Program Updates*. Your browser will direct you to an EndNote Web page where you can download the latest files.

We continually update output styles, filters, connection files, and Microsoft Word templates. The latest versions are included with program updates, but you can also download the latest files at any time from our Web site at http://www.endnote.com.

Uninstalling EndNote

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

To uninstall EndNote:

1. Make sure no applications are running.

2. Start EndNote. Close open files, such as libraries, connections files, filters, or styles.

3. From the *EndNote* menu, choose *Customizer*.

4. Click *Uninstall* and then confirm with *Yes*.

5. When the uninstall is done, click *Exit*.

6. Drag the EndNote X1 folder (typically found in the Applications folder) to the trash.

To manually uninstall EndNote:

1. Start by dragging the entire EndNote X1 folder to the trash.

2. To remove Cite While You Write files, delete any of these EndNote files or aliases that appear in Microsoft Word's Startup folder:

```
EndNote CWYW Commands.dot
EndNote CWYW Word 2004
EndNote CWYW Word X
EndNote Web CWYW Commands.dot
EndNote Web.bundle
```

3. To remove Manuscript Templates, delete the EndNote folder found in the Microsoft Office (X or 2004): Templates folder.

4. To remove Reference Type definitions and other preferences, delete the files found in the Users:[your folder]:Library: Application Support:EndNote folder.

5. To remove the EndNote preference file, delete the com.ThomsonResearchSoft.EndNote.plist file in the Users:[your folder]:Library:Preferences folder.

There may be several copies of the Users:[your folder]: Library:Application Support:EndNote folder and the com.ThomsonResearchSoft.EndNote.plist file; one for each user account.

Chapter 2: Windows EndNote Installation

Before You Install EndNote

Please read this section before you proceed with the installation.

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 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 2000, with Service Pack 3
    (some interface elements are not supported)

♦   Windows XP, with Service Pack 2

♦   Windows Vista

Hardware Requirements:

♦   A personal computer with a Pentium (or compatible) 450-MHz or faster processor

♦   A minimum of 256 MB of available RAM

♦   A hard drive with at least 180 MB of free space

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

NOTE: Make sure that your computer meets the system and hardware requirements before continuing. If necessary, contact the distributor, dealer, or store where you purchased EndNote to arrange for a full refund. If you have any problem obtaining a refund, contact Thomson ResearchSoft directly. You must do so within 30 days of purchase.

Word Processor Compatibility

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

♦ Microsoft Word for Windows 2000, XP (2002), 2003, 2007

♦ RTF files created with most word processors, including: Microsoft Word, WordPerfect, OpenOffice, StarOffice, FrameMaker, and WordPad.

Microsoft Word:

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

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

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

RTF Documents:

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

EndNote for Palm OS Requirements

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

Requirements for running EndNote for the Palm Operating System include:

♦ Handheld device

♦ Palm Operating System 4.x or later

♦ Serial or USB communication for HotSync operations

♦ 16 MB RAM, with at least 8 MB available

For information about how to use EndNote for Palm OS on your handheld device, see the EndNote Help file. In EndNote, go to the *Help* menu and choose *Contents*. See the Help topics in the "Palm OS Handhelds" book.

Installing EndNote

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

Please see the chapter titled "Using EndNote On a Network" in the full EndNote.PDF manual for information about licensing, installing, and using EndNote in a network environment.

To install EndNote:

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

2. Start the EndNote installation program.

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

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

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

3. Follow the instructions on 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 X1 CD packaging, or on the order confirmation of your digital product.

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

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

    User Information: Enter your name and organization.

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

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

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

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

Select Destination: By default, EndNote is installed in the C:\Program Files\EndNote X1 folder. The Demo version is installed in the C:\Program Files\EndNote X1 Demo folder. You can use the *Browse* button to change the folder selection if you wish.

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

'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 to use it after you run the EndNote X1 Demo version.

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

Select Default Reference Manager: (Microsoft Word 2007 only) If the installer detects Microsoft Word 2007, it asks whether to "Use EndNote as my default reference manager." Cite While You Write will be installed in Word 2007 in any case, but when this item is selected the installer will 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 X1 is Successfully Installed" dialog, click *Register* to register your copy of EndNote, click *Finish* to close the installation program, or click *Run* to start EndNote.

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

Custom Installations

Although we recommend that you use the *Complete* installation option to install EndNote, the *Custom* installation option can be useful if you are low on disk space or if you need to reinstall just certain EndNote components.

To do a new custom installation:

1. Follow the instructions for "Installing EndNote" on page 27.

2. On the dialog titled "Select Installation Type," select *Custom*.

3. When you get to the dialog titled "Select Features," read the section below, "Selecting Features" to determine what you would like to select/deselect for installation.

NOTE: If the installer detects another copy of EndNote in the destination folder, it gives you options to either backup or remove older files during the installation. When doing a custom install, only selected components are affected. For example, if you are installing only the Anthropology styles, and you choose to remove older files, only the older Anthropology styles are removed; no other part of the installation is affected.

To install components after EndNote X1 is already installed:

1. Start the installation program as you would for a new installation.

2. On the "Application Maintenance" dialog, select the *Modify* option and click *Next*.

3. When you get to the "Select Features" dialog, read the section below, "Selecting Features" to determine what you would like to select/deselect for installation.

Selecting Features

There are several major categories of components that can be installed with EndNote.

The components you can select for installation include:

EndNote Application

♦ EndNote Program

♦ Sample Files

♦ EndNote Help

♦ PDF Manual

Word Templates/Add-ins:

♦ Templates for Microsoft Word

♦ Cite While You Write for Microsoft Word

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

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

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

Spelling Dictionaries: These are dictionaries available for the spelling checker.

EndNote for Palm OS®: These are files required for using EndNote for the Palm operating system.

To select or deselect an item for installation:

Click the plus sign next to each category to display a detailed list of items. For each category or subcategory, click the triangle next to the name to select from the available installation options. The options may include:

♦ Will be installed on local hard drive.

♦ Entire feature will be installed on local hard drive.

♦ Will be installed to run from network.

♦ Entire feature will be installed to run from network.

♦ Feature will be installed when required.

♦ Entire feature will be unavailable.

Upgrading from an Earlier EndNote Version

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

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

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

Install the upgrade just as you would a new installation. See "Installing EndNote" on page 27. By default, EndNote X1 is installed into the C:\Program Files\EndNote X1 folder.

Backing Up or Replacing Files

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

♦ **Backup older files**: EndNote X1 provides complete, updated sets of style, filter, and connection files. But if you want to keep any of your older modified files to use with EndNote X1, you should choose this option. Doing so has EndNote create a "Backup" folder in the EndNote folder and all of the styles, filters, and connection files from your older installation are copied into that folder. After installing EndNote, you should move any of these files that you want to use into the Styles, Filters, or Connections folders installed with EndNote X1.

♦ **Remove older files**: If this option is selected, Setup replaces all of the styles, filters, and connection files from your existing EndNote installation with the new ones included with EndNote X1. Do *not* choose this option if you have custom styles, filters, or connection files that you want to save. If they have the same names as any of the files to be installed, the installer will overwrite them with the new files.

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

1. Start EndNote.

2. Go to the *Edit* menu and choose *Preferences.*

3. Click on the *Folder Locations* item.

4. If the folder paths do not include an EndNote X1 folder, click *EndNote Defaults* to update the paths.

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

Opening and Converting Old EndNote Libraries

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

To convert an older EndNote library:

1. Start EndNote.

2. From the *File* menu, select *Open* and then *Open Library*.

3. On the file dialog, locate and highlight the old library, and click *Open*.

    EndNote will warn that the selected library was created with an older version, and will ask for permission to convert it.

4. Click *OK* to convert the library. Name the new library and click *Save*. The conversion makes a *copy* of the original library in the version 8/9/X/X1 format, and leaves the original library intact.

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

Using Old Style, Filter, and Connection Files

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

All of the styles, filters, and connection files supplied with EndNote X1 have been updated to the version 8/9/X/X1 format. The new filter and connection files can be used by previous versions of EndNote, with new fields simply ignored. However,

EndNote 8/9/X/X1 styles *cannot* be used with versions of EndNote prior to version 8.

Checking Your Installation

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

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

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

Checking Microsoft Word Support

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

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

Word 2000, XP, or 2003 *Tools* **menu and** *EndNote X1* **submenu**
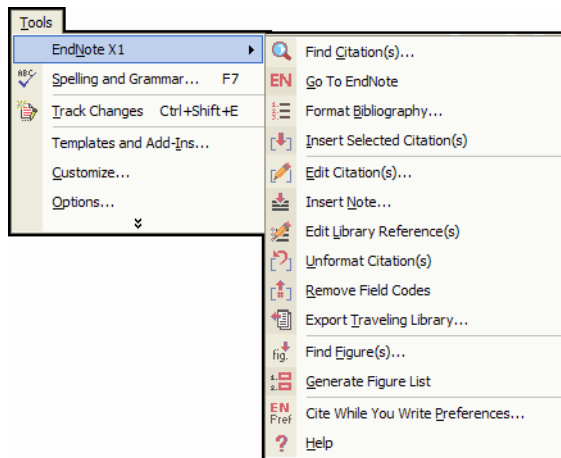
Word 2007 *EndNote* **tab**
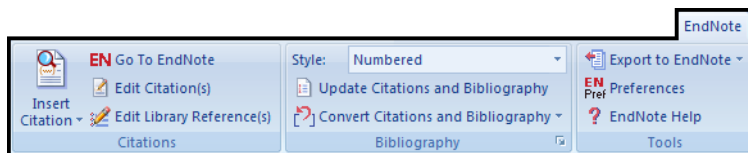
Cite While You Write commands may not be available if you upgraded your version of Word *after* installing EndNote, or if an administrator installed EndNote and you are running it from a different user account.

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

Word 2000, XP, and 2003 also include an EndNote toolbar as an alternative way to select EndNote commands. If more than one EndNote toolbar appears in Word after upgrading EndNote, see the Troubleshooting appendix in the full EndNote.PDF manual.

Automatically Updating Files

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

To update your copy of the EndNote program:

1. Open a connection to the Internet.

2. From EndNote's *Help* menu, select *EndNote Program Updates*.

The wizard checks for an update, lets you know whether an update is available, and then downloads the file(s) and applies the update to your EndNote installation.

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

Uninstalling EndNote

Uninstalling CWYW and Palm OS Support

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

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

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

1. Log on to the workstation as the current user. You do not have to be an administrator.

2. Launch the Configure EndNote utility. You can do this in one of these ways:

   ♦ From the Windows *Start* menu, choose *All Programs>EndNote>Configure EndNote*.

   ♦ Go to the EndNote program folder and double-click "Configure EndNote.exe."

3. Select *Remove all EndNote components for me* and click *Next*.

4. Continue through the uninstall process as instructed.

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

Uninstalling the EndNote Program

To uninstall EndNote:

1. From the Windows *Start* menu, select *Control Panel*, or choose *Settings* and then *Control Panel*.

2. Select *Add or Remove Programs*.

3. In the list of currently installed programs, select *EndNote X1*.

4. Click the *Remove* button.

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

1. From your EndNote CD, run Setup.exe.

2. On the "Application Maintenance" dialog, select *Remove* and click *Next*.

3. Click *Next* again to begin removing EndNote.

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

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

Chapter 3: 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 and open references in the EndNote library.

♦ Close references.

♦ Quit from the EndNote program.

Start EndNote

To start the EndNote program and open the sample library:

1. **Macintosh**: Open the EndNote X1 folder and double-click the EndNote program icon. By default, the EndNote X1 folder is installed in the Applications folder on your hard drive.

EndNote X1

Windows: From the *Start* menu, choose *Programs*, select *EndNote,* and then choose the *EndNote Program*.

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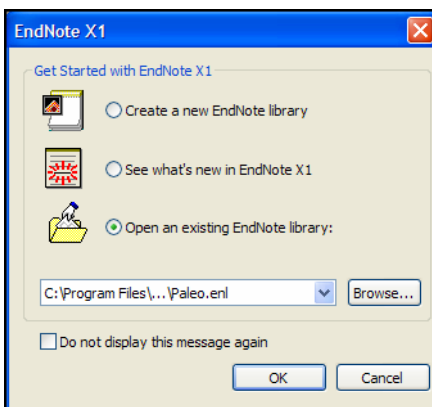
NOTE: If you have set a default library to open automatically, that library will open instead of the dialog shown above. If this happens, close the library, choose *Open* from the *File* menu, and continue with step 3.

2. Select *Open an existing EndNote library*.

3. To open the library, do one of these:

♦ Select Paleo.enl in the drop-down list, and click *OK*.

♦ If Paleo.enl does not appear in the drop-down list, click *Browse* to locate it. A file dialog will appear, prompting you to locate and open a reference library.

Macintosh: Select the Examples folder that was installed in the EndNote X1 folder and click *Open*. Then, select the Paleo.enl library (your folder settings may or may not be set up to show the .enl extension.) and click *Open.*
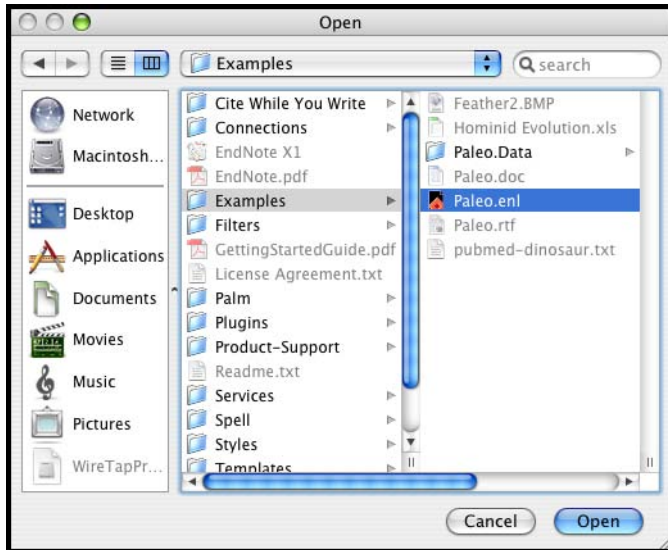
Windows: Use the "Look in:" list to find the EndNote X1 folder. By default, this will be on the C drive in the Program Files folder. To get there, click the "Look in:" list, choose the "C:" drive and click *Open*; select Program Files and click *Open*; and then select and open the EndNote X1 folder.

Select the Examples folder (or the shortcut to the Examples folder) and click *Open*. You should now see the file "Paleo.enl," the example EndNote library. (Your folder View

settings may or may not be set up to show the .enl extension.)
Select Paleo.enl and click *Open.*
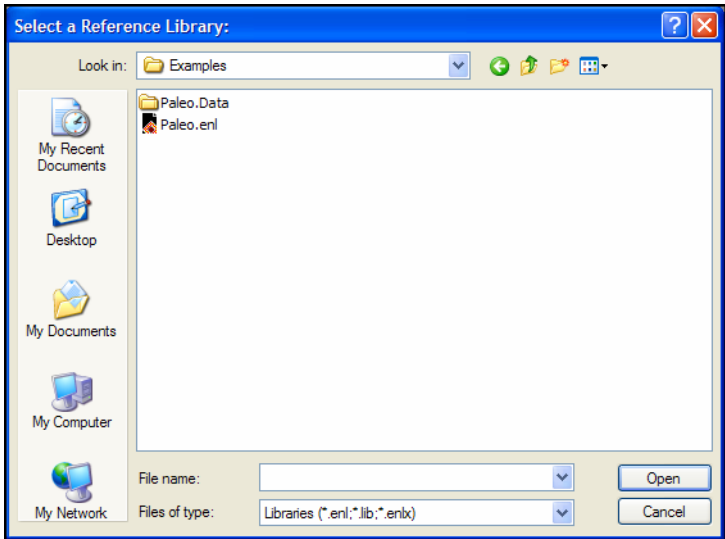
NOTE: You can open a library from within EndNote by choosing *Open* from the *File* menu.

The Library Window

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

Move column dividers to adjust column widths.
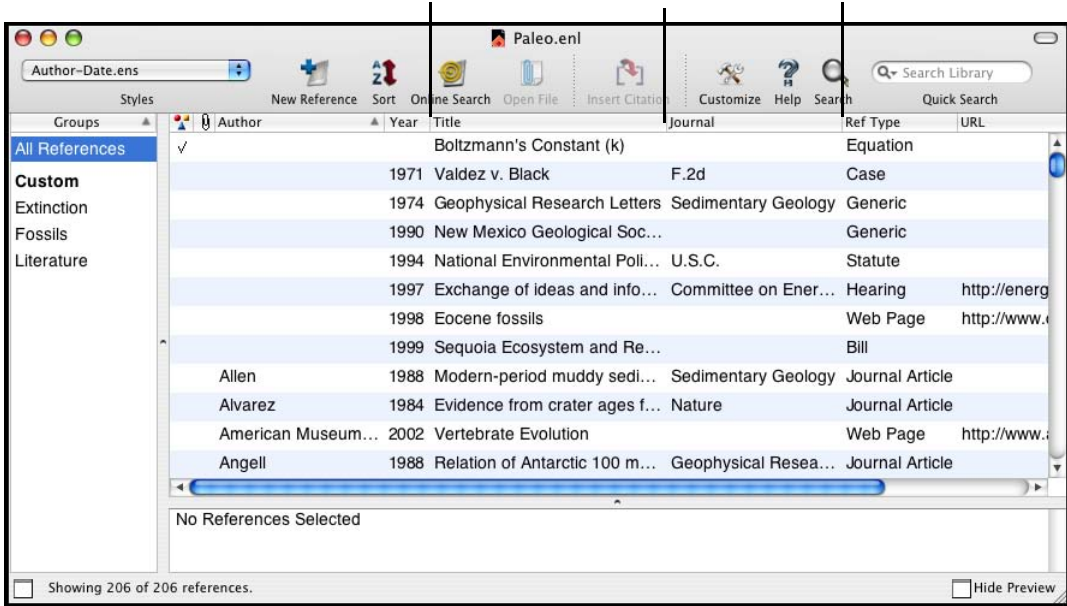
The Library window displays a multi-column list of references. By default, the first column in the reference list shows a figure heading for references that include an attached graphic or file in the Figure field. The second column shows a paper clip icon for references that include an attached file in the File Attachments field. Then, the first author's last name, the year, the title, the reference type, and the URL are displayed for each reference.

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

The information displayed here in the Library window, as well as the font used for the display, can be changed using the EndNote Preferences.

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

Preview References

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

To preview a reference:

1. First, if you do not have a lower pane in the window, click on the *Show Preview* button at the bottom of the window.

2. For this example, click on the reference titled "Geophysical Research Letters."

    The preview pane uses the current **output style** to display the selected reference as it will be formatted for a bibliography. EndNote's output styles (or just **styles**) represent the rules for creating bibliographies for a variety of journals and other publications. The styles determine how your references look when you print, export, preview, or create bibliographies.

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

Macintosh toolbar
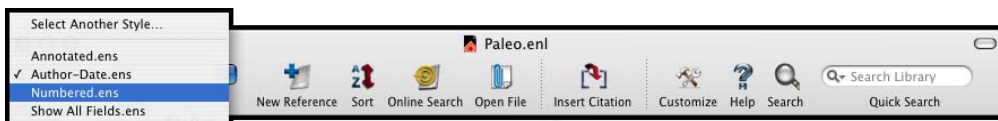
Windows toolbar
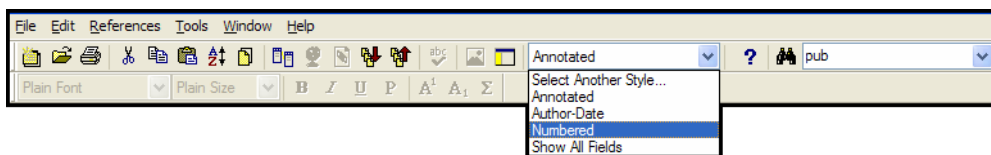
Only one reference is displayed in the preview pane at a time. If multiple references are selected, only the active reference (surrounded by a dotted line) is displayed. The format of the

reference in the preview pane can be changed at any time by choosing a different output style.
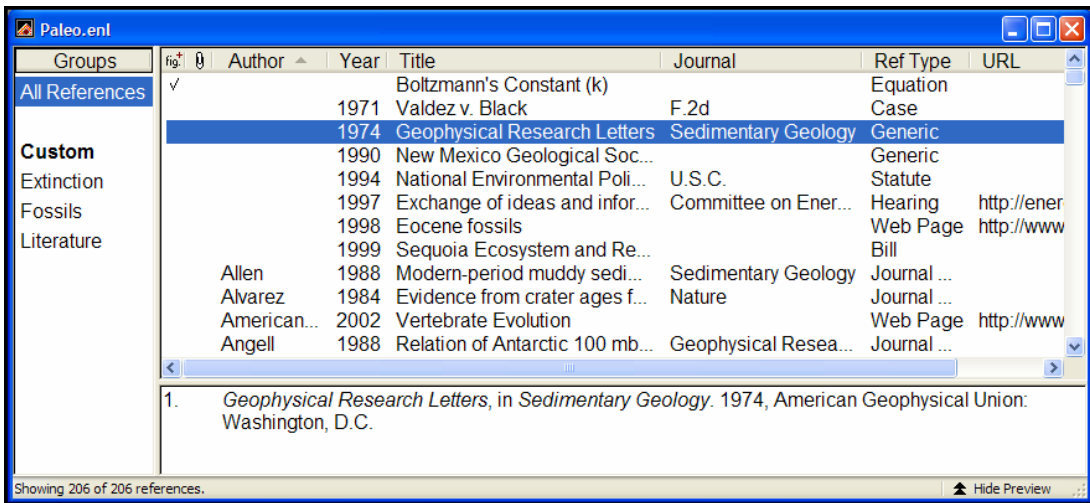
When the preview pane is showing, a *Hide Preview* button is available at the bottom of the window. You can click *Hide Preview* to hide the preview pane if you wish. The name of the button will toggle to *Show Preview*.

Sort the References

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

To change the sort order:

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

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

2. Click the Year column heading to see the references sorted in ascending order based on the year of publication.

3. Click the Year column heading again (a second time) to reverse the sort order and see the references sorted in *descending* order.

4. Now, click the Author column heading to return the sort order of the library to an alphabetical list sorted by the author names.

Select and Open a Reference

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

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

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

To quickly find and display a reference:

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

Groups	fig	0	Author ▲	Year	Title	Journal	Ref Type	URL	
All References				1990	New Mexico Geological Soc...		Generic		
				1994	National Environmental Poli...	U.S.C.	Statute		
				1997	Exchange of ideas and infor...	Committee on Ener...	Hearing	http://ener	
Custom				1998	Eocene fossils		Web Page	http://www	
Extinction				1999	Sequoia Ecosystem and Re...		Bill		
Fossils			Allen	1988	Modern-period muddy sedi...	Sedimentary Geology	Journal ...		
Literature			Alvarez	1984	Evidence from crater ages f...	Nature	Journal ...		
			American...	2002	Vertebrate Evolution		Web Page	http://www	
			Angell	1988	Relation of Antarctic 100 mb...	Geophysical Resea...	Journal ...		
			Apollonov	1988	Batyrbay section, South Kaz...	Geological Magazine	Journal ...		
			Archaeos...	1999	Preliminary Site Report of th...		Web Page	http://www	
			Argus	1993	New paleontological excavat...	Journal of Paleontol...	Journal ...		

1. Argus, M.V., *New paleontological excavation techniques*. Journal of Paleontology, 1993. **19**: p. 234-237.

Showing 206 of 206 references.   ▲ Hide Preview

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

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

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

title bar

close button

Show or Hide empty fields in the reference.

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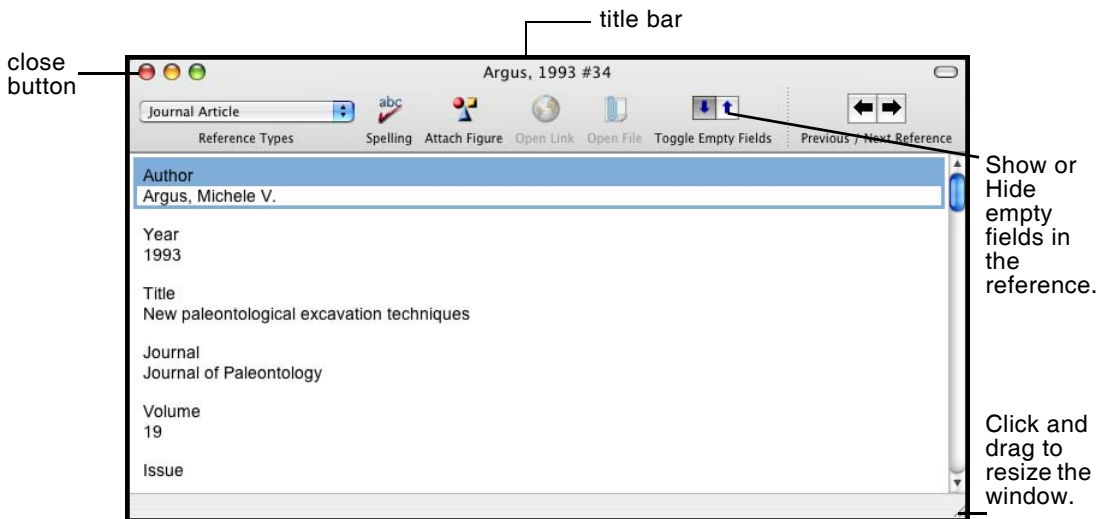
This is where you enter or edit information for a reference. The citation information is displayed at the top of the Reference window in the title bar, "Argus, 1993 #34." This information—the first author's last name, year, and record number—is used by EndNote to match citations in a paper to references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

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

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

Close the Reference

Next, close the reference. You can do this in one of these ways:

♦ Click the close button in the upper corner of the Reference window.

♦ From the *File* menu, choose *Close Reference*.

♦ From the keyboard, press ⌘+W (Macintosh) or CTRL+W (Windows). Note that many of the menu commands have a keyboard equivalent next to them.

Save References to a Group

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

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

To create a new group and add references to it:

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

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

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

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

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

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

6. Click on the *Geology* group to display the two references now included in the group.
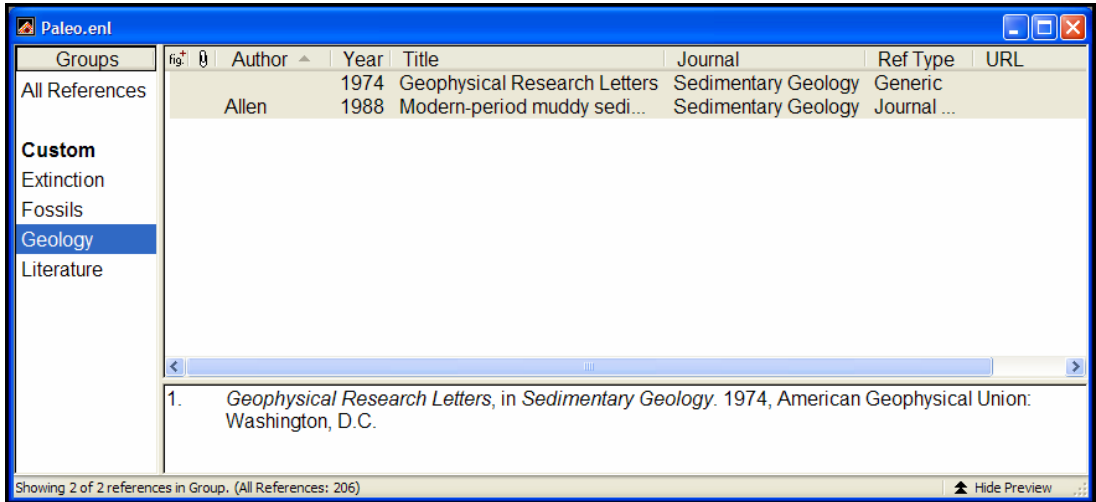
Click on *All References* to display all of the references in the library again.

To delete a group:

1. CONTROL+click (Macintosh) or right click (Windows) on the *Geology* group to display a context-sensitive menu.

2. Select *Delete Group*.

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

If you do not want to continue with the next chapter (Setting EndNote Preferences), go to the *EndNote* menu and choose *Quit EndNote* (Macintosh) or go to the *File* menu and choose *Exit* (Windows) to close the program. Otherwise, you can continue with the tour.

Related Sections in the Full Manual

See these sections in the full EndNote.PDF manual for information related to this portion of the tour:

♦   Learn how to change the display of the Library window in Chapter 4, "The EndNote Library."

♦   To learn more about sorting, see "Sorting the Library" in Chapter 8.

♦   To learn more about creating and managing groups, see "Using Groups" in Chapter 8.

Chapter 4:   Setting EndNote Preferences

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

♦   Display EndNote Preferences

♦   Set a default library to open each time you start EndNote.

♦   Change the display fonts.

Open the Paleo Library

If EndNote is not already running, start it and open the Paleo library as shown under "Start EndNote" on page 37.

Access EndNote Preferences

**To view or change the EndNote preferences:**

From the *Endnote X1* menu (Macintosh) or *Edit* menu (Windows), choose *Preferences*.

Many of these preferences are stored in an EndNote preferences file (Macintosh) or your Windows registry, although there are exceptions.

Set a Default Library

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

To set a default library:

1.   If you haven't already, go to the *Endnote X1* menu (Macintosh) or *Edit* menu (Windows) and choose *Preferences.*

2.   In the list on the left, click *Libraries.*

3. Click *Add Open Libraries.* You should see the Paleo library (Paleo.enl) listed at the top of the window.
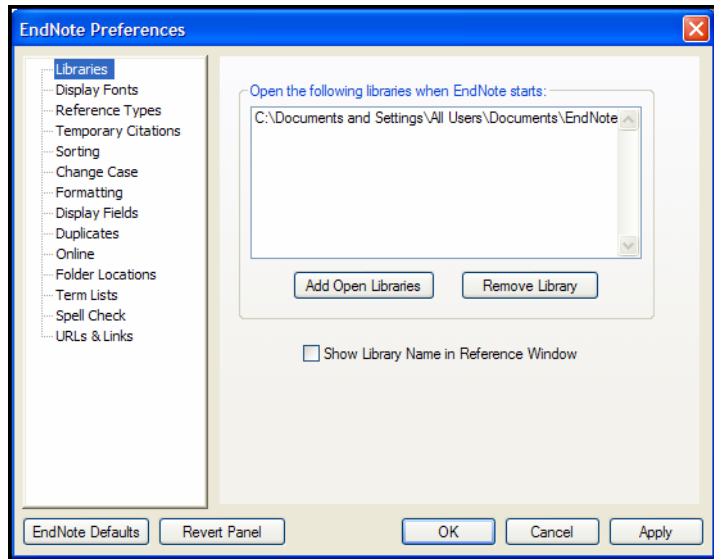
4. Click *Save* (Macintosh) or *Apply* (Windows) to save this change.

While you could click the red close button (Macintosh or Windows), or *OK* (Windows) to leave the Preferences dialog, we are going to change another preference first.

Change the Library Display Font

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

To change the display fonts:

1. If you aren't currently viewing the EndNote Preferences window, go to the *Endnote* menu (Macintosh) or *Edit* menu (Windows) and choose *Preferences.*

2. In the list on the left, click *Display Fonts.*

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

   ♦ The General font changes the font used to display most text that is typed into EndNote (such as in the Reference or Style windows). The General 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 font determines the font and size used for the Reference window field labels.

♦ The Search font determines the font and size applied to user-entered text on the Search window.
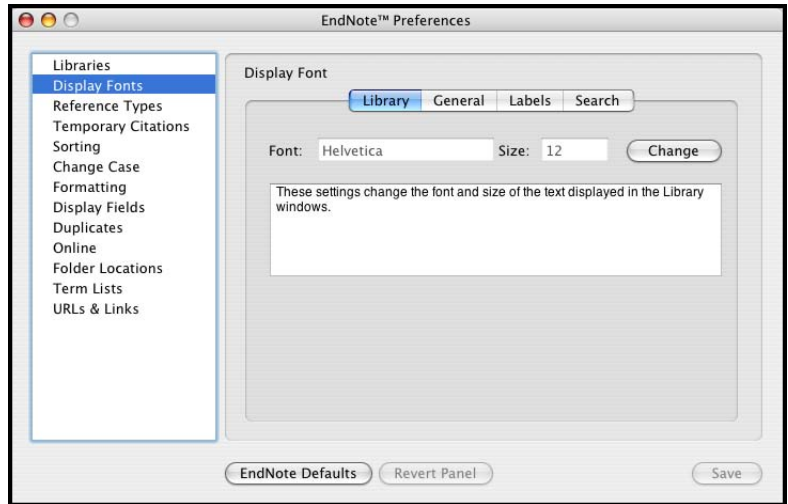
3. On the *Library* tab, click the *Change* or *Change Font* button.

4. In the Font list, select a different font (for Windows, select *Arial Unicode MS* or another Unicode font that supports Japanese characters) and click *Save* (Macintosh) or *Apply* (Windows) to save the change.

   EndNote uses Unicode to correctly handle extended characters. By selecting a Unicode font here, you can view extended characters in the Library window, such as the Japanese characters found in the Paleo library.

5. On the *General* tab, click the *Change* or *Change Font* button.

6. In the Font list, select a different font (for Windows, select *Arial Unicode MS* or another Unicode font that supports Japanese characters) and click *Save* (Macintosh) or *Apply* (Windows) to save the change.

7. Click the red close button or *OK* (Windows) to leave the Preferences dialog.

Related Sections in the Full Manual

See these sections in the full EndNote.PDF manual for information related to this portion of the tour:

♦ Learn how to change the display of the Library window in Chapter 4, "The EndNote Library."

♦ The Preferences panels provide numerous ways in which you can customize your version of EndNote. For example, you can ignore articles when sorting, set duplicate detection options, etc. See Chapter 18 for more information about working with the preferences.

Chapter 5:   Entering a Reference

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

♦   Enter a reference into a library.

♦   Attach a figure and other types of files to a reference.

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

Open the Paleo Library

If EndNote is not already running, start it and open the Paleo library (Paleo.enl), as shown under "Start EndNote" on page 37.

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 Chapter 6: "Searching an Online Database."

♦   Import text files of references that have been downloaded from online bibliographic databases or CD-ROMs, as demonstrated in Chapter 7: "Importing Reference Data into EndNote."

This example demonstrates how to type reference information into EndNote.

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

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

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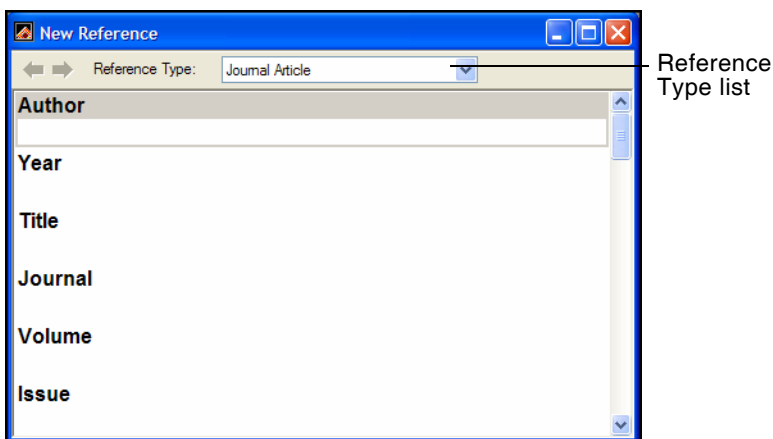
New references appear as journal articles (unless you change the default setting) but can be changed to any other type of reference using the *Reference Type* list at the top of the Reference window.

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

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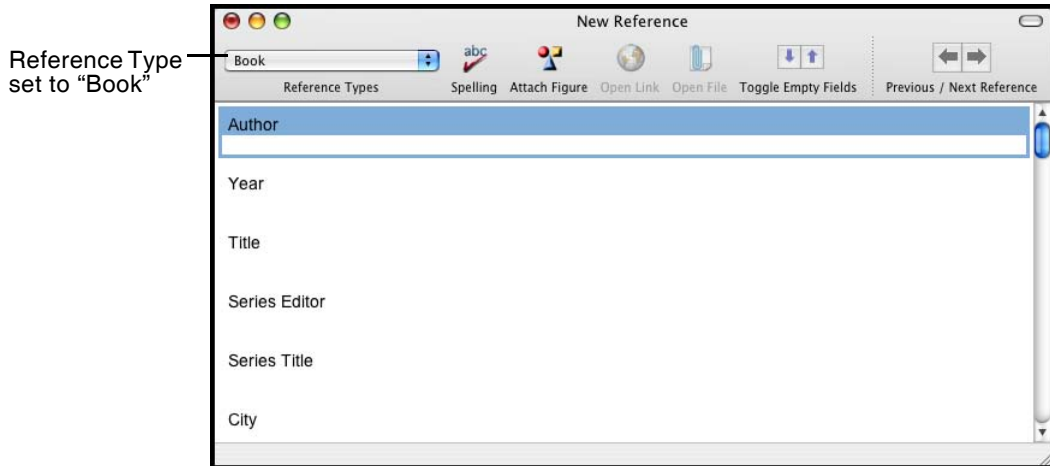
Notice that the field list changes to reflect the type of bibliographic information you would record for a book. You are welcome to select other reference types from the list to see how the list of fields changes for each type of source.

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

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

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

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

      Tiberius Rex

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

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

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

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

    `Roe, Jennifer`

    This author is already in the Paleo library, so as you start typing the last name, you will see EndNote complete the name for you.
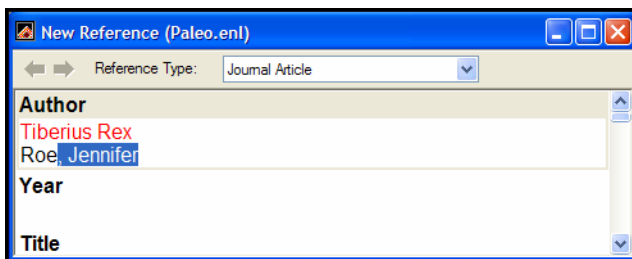
Press RETURN (Macintosh) or ENTER (Windows) to accept EndNote's suggested author name.

c. For the third author, enter:

    `de Young, John Robert, Jr.`

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

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

    `University of California,, Berkeley`

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

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

   ```
   2006
   ```

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

   Title: The scale and the feather: A suggested evolution

   Journal: Paleontology

   Volume: 3

   Issue: 1

   Pages: 125–128

   Date: November 22

   Keywords: Feathers
            Evolution
            Birds

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

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

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

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

a. Navigate to the folder:
   Applications:EndNote X1 (Macintosh)
   Program Files\EndNote X1 (Windows).

b. Notice the check box titled "Copy this file to the default file attachment folder and create a relative link." Make sure this box is selected so that EndNote will make a copy of the file to store with the library. That way, the attached file is always available to you, even when you move the library.

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

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

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

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

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

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

You can also insert object files, such as:

♦ Audio files (WAV, MP3)
♦ Microsoft Access files
♦ Microsoft Excel files
♦ Microsoft Power Point files
♦ Microsoft Project files
♦ Microsoft Visio files
♦ Microsoft Word files
♦ Multimedia files (MOV, QuickTime)

♦ Technical drawing files

♦ Text files (TXT, RTF, HTML)

Scroll to the Figure and Caption fields, and from the *References* menu, select *Figure* and then *Attach Figure*.
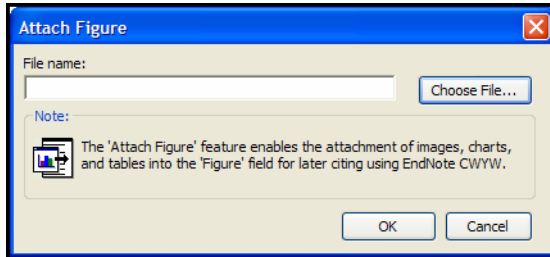
Click *Choose File* to display a file dialog.

On the file dialog:

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

b. Highlight the file titled Feather2.BMP.

c. Click *Open* to insert the file into the Figure field.
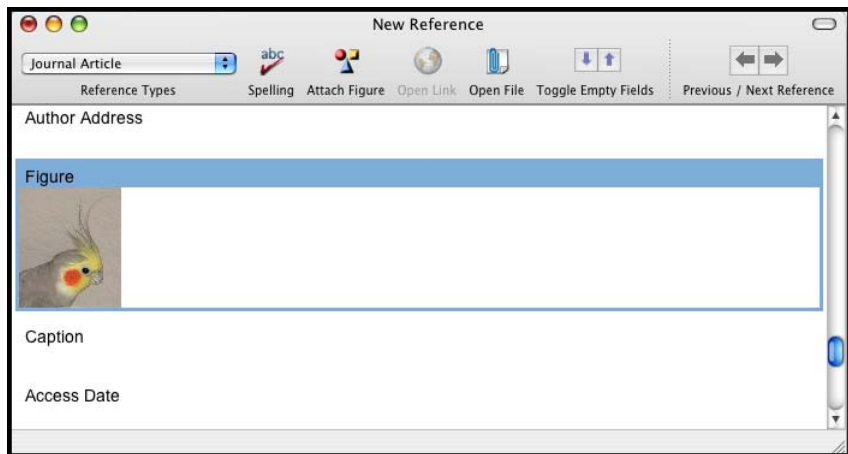
The graphic appears as a thumbnail in the reference. EndNote copied the file to a .DATA folder stored with the Paleo library, and linked the copied graphic to this reference.

In the Caption field, enter:

```
Cockatiel Crest Feathering
```

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

8. Close the Reference window by clicking the close button in the upper corner of the Reference window, or by choosing *Close Reference* from the *File* menu.

Save changes if prompted; otherwise, all information is automatically saved when you close the reference window. Your new reference will appear in the Library window.
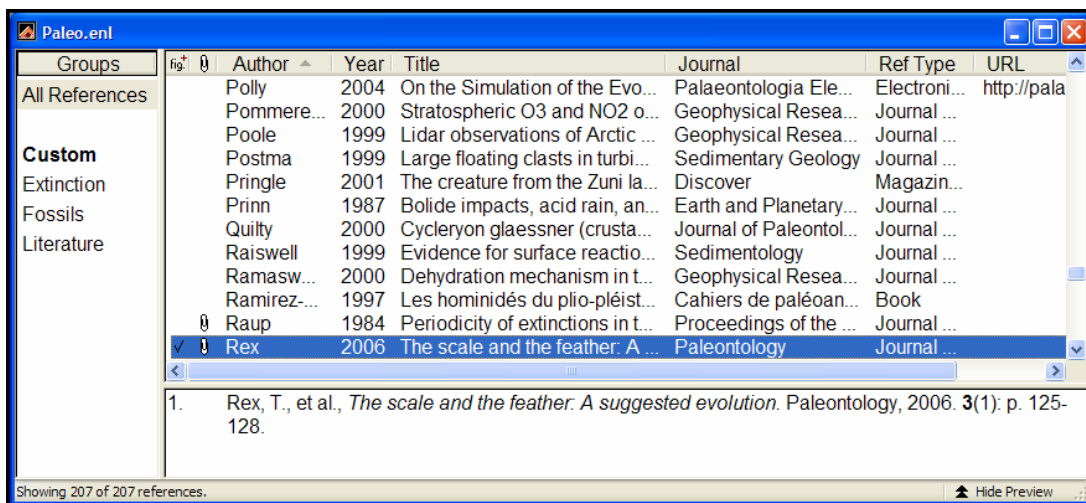
The reference shows a check mark under the figure heading to indicate that the reference includes a figure, plus a paper clip icon to indicate an attached file.

Locate References That Contain Attached Files or Figures

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

To locate the references containing figures:

Click the figure column heading twice to sort references containing figures at the top of the list. Each reference with a check mark next to it has an attached figure that you can cite in Microsoft Word.
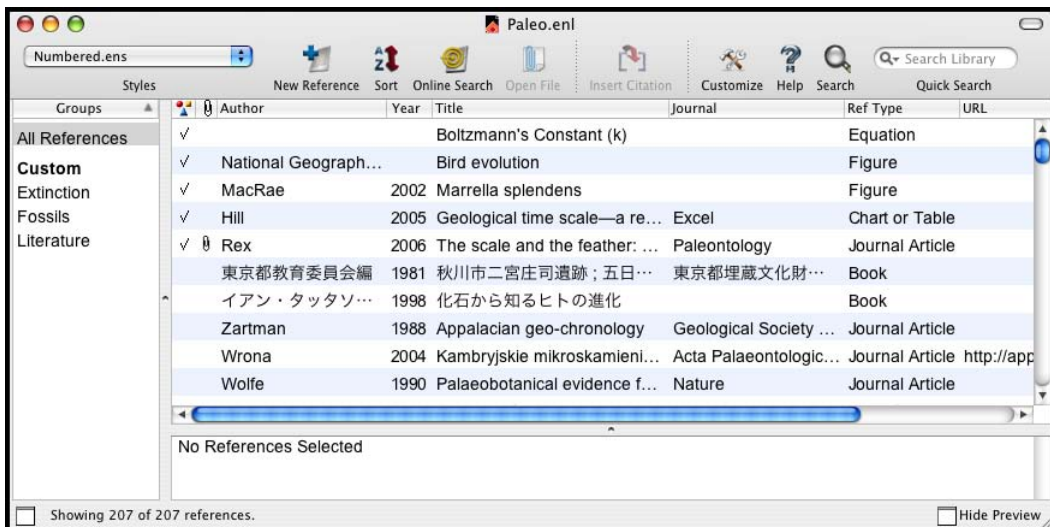
To locate the references containing attached files:

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

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

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

This concludes Chapter 5 of the guided tour. Chapter 6 demonstrates how to search online databases and save your search results to an EndNote library. If you do not have an Internet connection, skip Chapter 6 and move on to Chapter 7: "Importing Reference Data into EndNote" on page 69.

If you are finished working with EndNote for now, go to the *EndNote* menu and choose *Quit EndNote* (Macintosh) or go to the *File* menu and choose *Exit* (Windows) to close the program.

Related Sections in the Full Manual

See these sections in the full EndNote.PDF manual for information related to this portion of the tour:

♦ If you are eager to begin creating your own library, see Chapter 4, "Introducing the EndNote Library."

♦ Chapter 5, "Entering and Editing References," provides more detail about typing references and inserting images.

Chapter 6: 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. And to make it even easier, the results of your searches appear as EndNote references—ready for you to store in your own EndNote library.

This section will guide you through these basic steps:

♦   Connect to an online database.

♦   Search the database.

♦   Copy the references that you want to keep into an EndNote library.

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

About the PubMed Database

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

For Users With "Dial-up" Internet Connections

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

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

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

Open the Paleo Library

If EndNote is not already running, start it and open the Paleo library (Paleo.enl), as shown under "Start EndNote" on page 37.

Connect to an Online Database

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

To connect to the PubMed Database:

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

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

Click to show more or less info about the selected connection file.
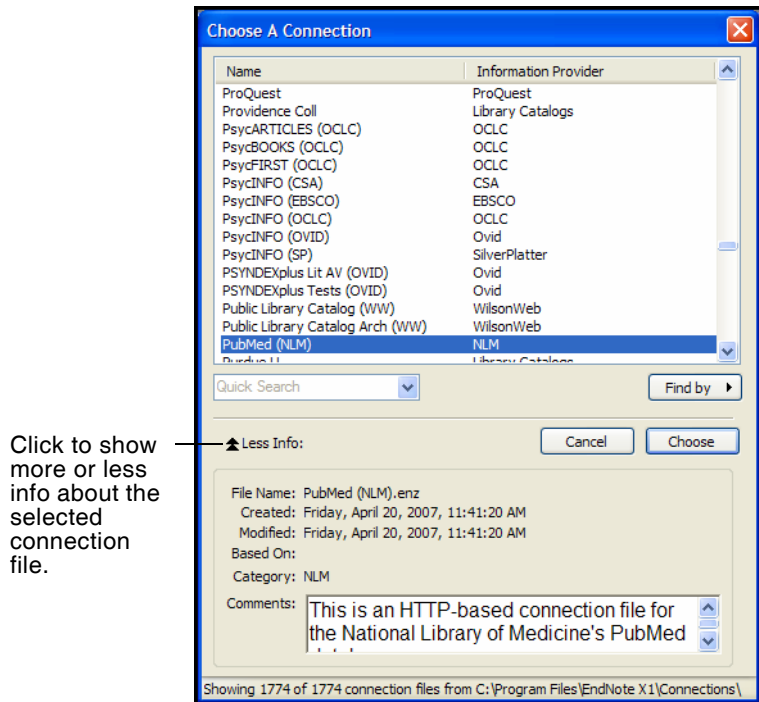
NOTE: This window displays all of the connection files available in your Connections folder. Use the Find by Category list (Macintosh) or the *Find by* button (Windows) to quickly view various categories of databases to help you locate the one that you need. Or, type text into the Quick Search text box and press RETURN (Macintosh) or ENTER (Windows).

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

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

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

The online database is
selected for searching.

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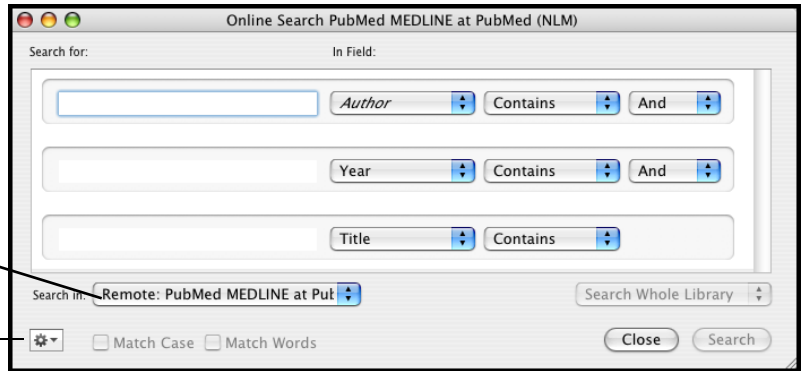
NOTE: If you previously set a default configuration for the Search
window, the search field lists display the fields you selected as your
defaults. If one of these fields appears italicized in the Search window
lists, that indicates it is not a valid option for this particular online
database.

Search the Database

The next step is to enter the search term(s) to find the references
you need. Searching an online database is very similar to
searching an EndNote library, with a few exceptions.

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

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

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

field list — comparison list
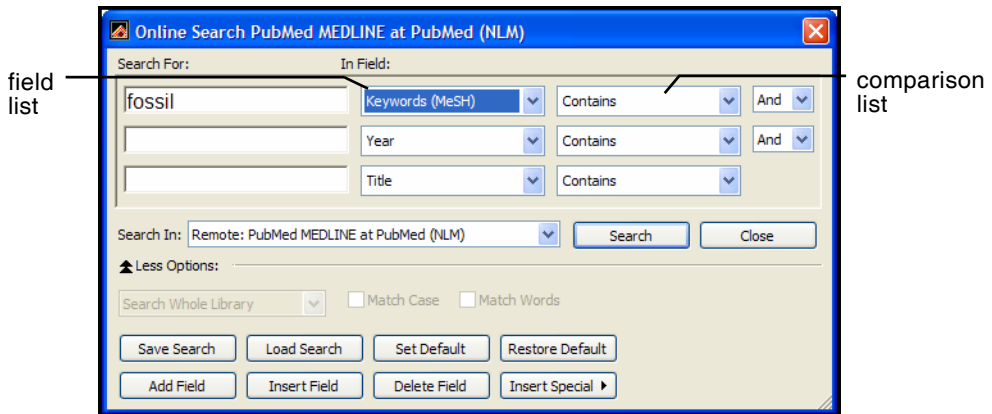
2. Click *Search*.

   EndNote sends the search request off to the online database (PubMed, in this example), and a summary of the search results is displayed:
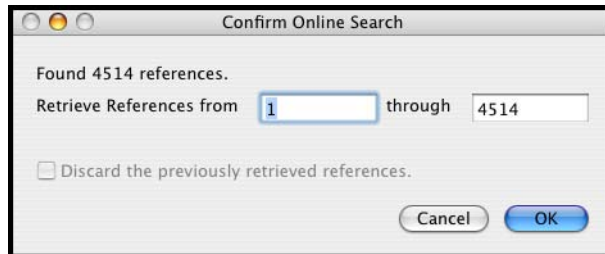
   The dialog displays the number of references that were found to match your search request, and gives you the option to retrieve them.

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

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

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

4. Click in the second search line and type "trilobite."

5. From the field list for the second search line, select *Any Field*.

6. Set the operator between the two search lines to *And*.

Choose the "And" operator.
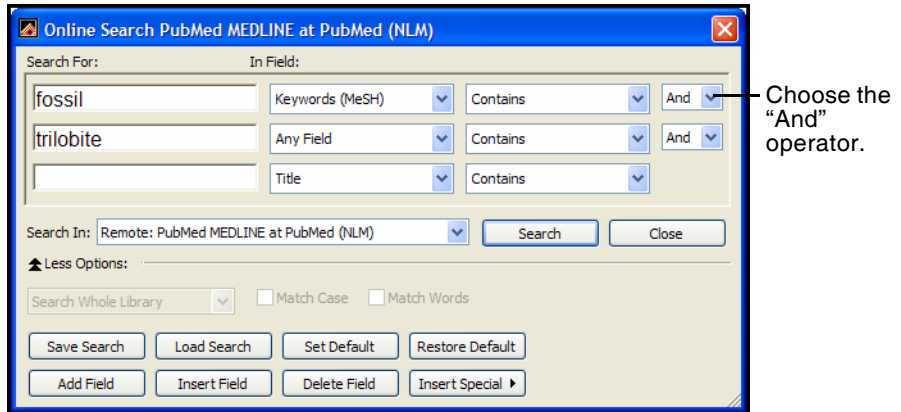
7. Click *Search*.

   This time only 12 references were found.
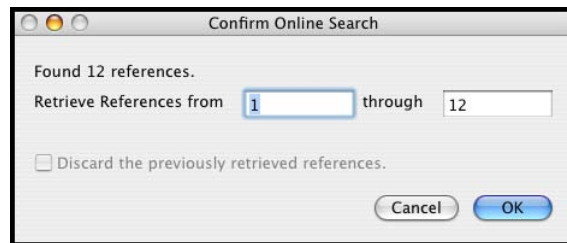
8. Click *OK* to retrieve the matching references.

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

   You can halt a retrieval in progress by clicking the *Pause* button on the Retrieved References window, or by pressing the Escape key (ESC), or by pressing ⌘+PERIOD (Macintosh).

9. We are finished searching for this tour, so *Close* the Search window.
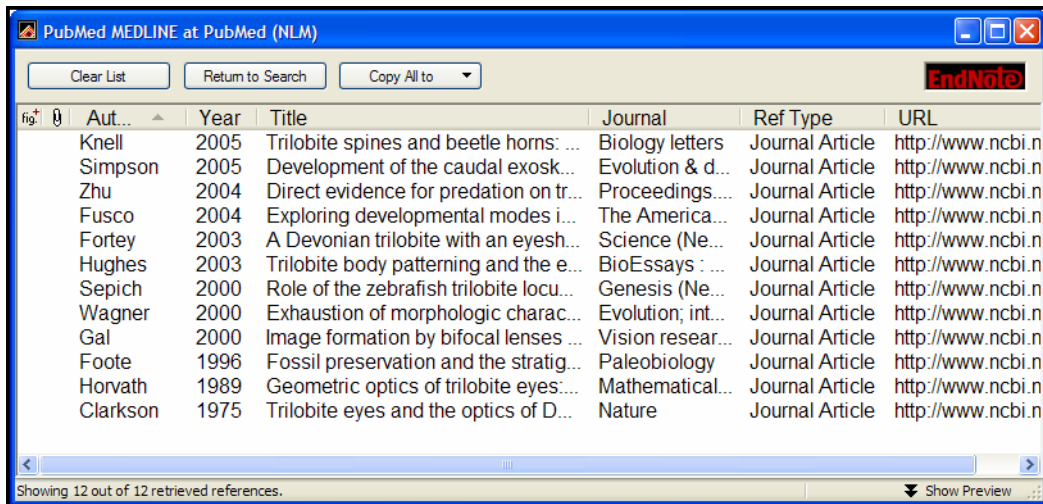
You can drag the dividers between column headers to resize column widths.

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

Save the References

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

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

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

To save your retrieved references:

1. Select two of the references displayed by holding down the ⌘ key (Macintosh) or the CTRL key (Windows) and clicking on the individual references. (SHIFT+click to select a range of references.)
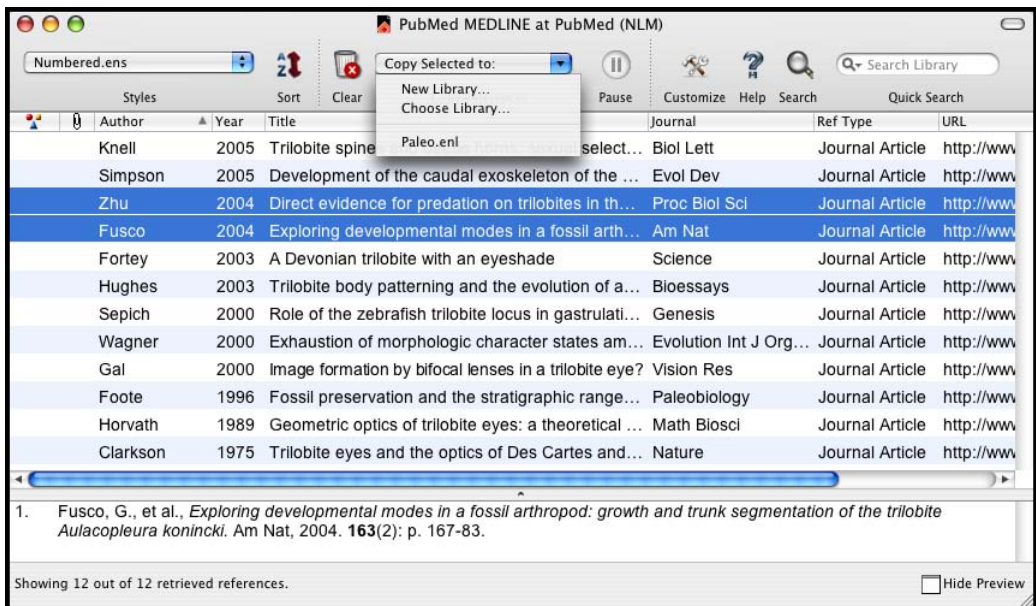
2. Click the Copy References list on the toolbar (Macintosh), or click the *Copy Selected to* button (Windows), and do one of these:

♦ If the Paleo library is already open and appears in the list, select it.

♦ Or, select *Choose Library*. In the file dialog that appears, go to the EndNote X1 folder, open the Examples folder, choose Paleo.enl, and click *Open*.

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

3. Close the Retrieved References window for PubMed.

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

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

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

If you are finished working with EndNote for now, go to the *EndNote* menu and choose *Quit EndNote* (Macintosh) or go to the *File* menu and choose *Exit* (Windows) to close the EndNote program.

Related Sections in the Full Manual

See these sections in the full EndNote.PDF manual for information related to this portion of the tour:

♦   See Chapter 5 for details about establishing connections, searching for references, and retrieving references.

♦   Read "Selecting a Connection File" in Chapter 5 to learn about the connection files that are available with EndNote.

♦   See "Troubleshooting Connections" in the Troubleshooting appendix if you encountered any problems establishing a connection.

♦   See Chapter 17, "Connection Files" for information about creating and editing connection files.

Chapter 7: Importing Reference Data into EndNote

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

If you have access to an online bibliographic database, a university catalog, or a bibliographic database on CD-ROM, you can probably use EndNote's import filters to import text files saved or downloaded from these sources. EndNote filters are configurable, so they give you the flexibility to import the reference data you need and eliminate data you do not need.

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

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

Open the Paleo Library

If EndNote is not already running, start it and open the Paleo library (Paleo.enl), as shown under "Start EndNote" on page 37.

Search the Database and Save the References

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

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

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

Rogers SW.

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

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

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

          PMID: 15759265 [PubMed - as supplied by
          publisher]
```

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

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

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

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

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

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

Choose the Correct Import Filter and Import into EndNote

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

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

1. Display the Paleo library window in EndNote.

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

the
Macintosh
Import
dialog
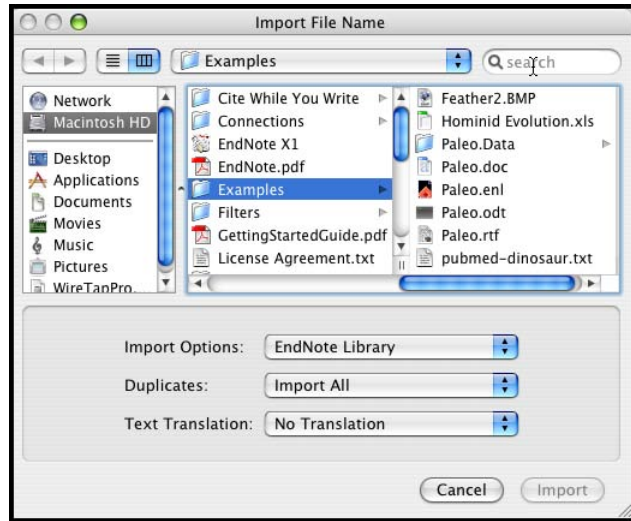
the
Windows
Import
dialog
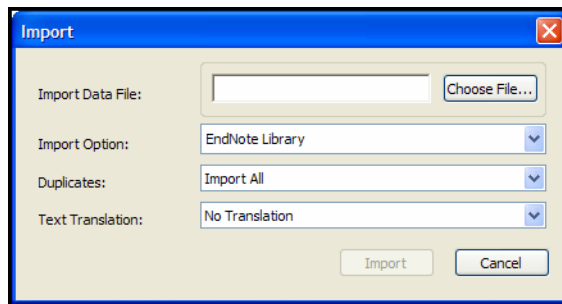
3. Select the file to import:

   Macintosh: Browse to the EndNote X1:Examples folder and highlight the Pubmed-dinosaur.txt file.

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

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

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

5. Begin typing "PubMed" to jump to that filter in the list.
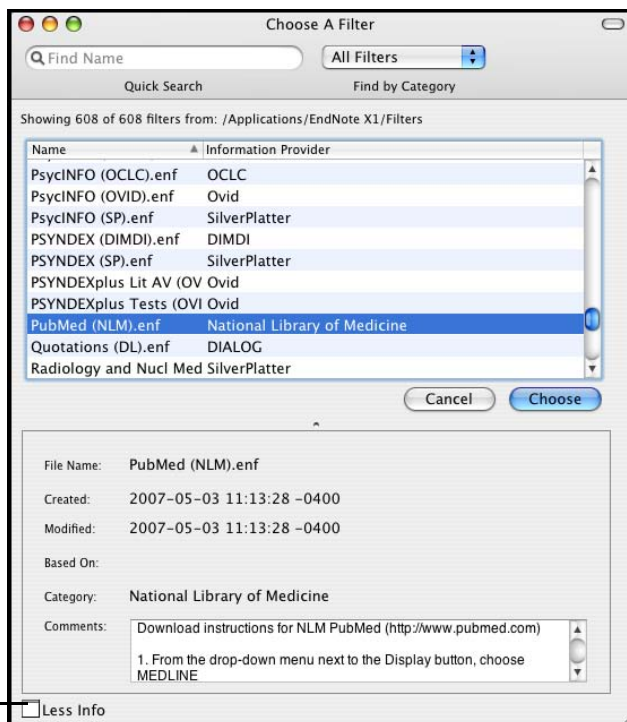
Click to display more or less info about the file.

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.

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

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

   Duplicates: Import All

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

   Text Translation: No Translation

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

8. Click *Import* to import the file.

When the import is complete, only newly imported references are displayed in an Imported References group. This is a good time to check the imported data to make sure it imported as expected. You can easily edit or delete the new references.

Paleo.enl					
Groups	fig. 0	Author ▲	Year	Title	Journal	Ref Type	URL

Author	Year	Title	Journal	Ref Type	URL
Claridge	2005	History and Development of ...	World J Surg	Journal ...	
Dalton	2001	Elusive fossil could conceal ...	Nature	Journal ...	
Gurley	1991	Proteins in the fossil bone of...	J Protein Chem	Journal ...	
Kerr	2001	Paleontology. Paring down t...	Science	Journal ...	
Rensberger	1987	Cracks in fossil enamels res...	Scanning Microsc	Journal ...	
Rogers	2005	Reconstructing the behavior...	Am J Med Genet A	Journal ...	
Ruben	2003	Respiratory and reproductiv...	Physiol Biochem ...	Journal ...	
Schweitzer	2005	Soft-tissue vessels and cellu...	Science	Journal ...	

Groups: All References, Imported References, Custom, Extinction, Fossils, Literature

No References Selected

Showing 8 of 8 references in Group. (All References: 217)   ▲ Hide Preview

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.

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

Summary of Output Formats and Corresponding 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.

NOTE: 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 80.

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
AARP AgeLine (http:// research.aarp.org/ ageline/home.html)	There is no method for downloading data from this database. Instead, save the results screen as a plain text file with your web browser's *Save* command. The resulting text file contains tags which are preceded by 18 spaces.	Ageline (AARP) filter
ACM Digital Library (Association for Computing Machinery)	Users with subscription access to this web site can save multiple records to a BINDER. Once saved, you can export the records in an EndNote format. Non-subscribers can download one record at a time: 1. Create a search. 2. Click on an article. 3. Scroll half-way down the page and select DISPLAY EndNote. Limitations: Since only plain text files can be imported into EndNote, you cannot import images, graphics, etc. Before importing, you may need to edit the file to insert a comma after corporate author names. Otherwise, EndNote will not be able to distinguish corporate authors from personal authors.	EndNote Import
CAS SciFinder	Save references in the "Tagged Format" (*.txt).	SciFinder (CAS) filter

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
CSA **(formerly Cambridge Scientific Abstracts)**	From the CSA search results screen, click *Save/Print/Email*. On the "Save/Print/Email" screen, select: Record Format: Full Record Save File Format: PC Click *Save*. Your Web browser asks where to save the file. If your Web browser lets you save in different file formats, make sure you save as a "Text Only" (*.txt) file.	Various filters for CSA databases are provided in the EndNote Filters folder.
DIALOG	Set your communication software's option to capture text. Use Dialog's Format 5 with "tag" appended to the TYPE command -- type "s1/5/1-20 tag". You must download data in Format 5. If Format 5 is not available, try the "full" format, which is sometimes the same as Format 5. For questions concerning Dialog's many formats, please contact Dialog's tech support.	Various DIALOG filters are provided in the EndNote Filters folder.
DIMDI	Use the DLOAD command with report D1 (e.g. DLOAD REPORT=D1).	Various DIMDI filters are provided in the EndNote Filters folder.
EBSCOhost	1. After adding selected references to your folder, click "View Folder" or "Folder has items" to see its contents. 2. On the Folder Content page, click *Export*. 3. On the Export Manager page: ♦ Select "Direct export to EndNote" to have references exported directly to EndNote, or ♦ Select "Generic bibliographic management software" to save a file to disk (and later Import into EndNote). 4. 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.

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
Emerald	Display the marked list, click "display for download (ASCII)," and then save as a plain text file. The filter provided works for these Emerald databases: Emerald Management Reviews at http://www.emeraldinsight.com/revs/ Computer Abstracts International Database at http://www.emeraldinsight.com/caid International Civil Engineering Abstracts at http://www.emeraldinsight.com/icea/ Computer & Communications Security Abstracts at http://www.emeraldinsight.com/ccsa/ Current Awareness Abstracts at http://www.emeraldinsight.com/caa/ Limitations: Page numbers are separated by a hyphen with spaces on either side of it. You will need to manually remove the spaces after importing.	Emerald filter
InfoTrac (Gale)	From the E-Mail Delivery panel at the bottom of the marked list window, restrict the contents to "citation;" do not choose "full article." Limitations: Records often have extraneous information in the title field, which must be removed manually after importing.	InfoTrac (GALE) filter
INIST	1. Click the *Enregistrer* button. 2. Select the records you wish to download. 3. Under "Quels champs?" choose "Tous les champs." 4. Under "Incluez" choose "Numéro de notice et nom de la base de données" and "Libellés abrégés." 5. Click the *Sauvegarde de notices* button.	Various INIST filters are provided in the EndNote Filters folder.
INNOPAC	Save references in the "EndNote" format.	EndNote Import
Knowledge Finder	Place document in the Save file, and select the document. Choose *Export Selected Documents* from the *File* menu.	Various Knowledge Finder filters are provided in the EndNote Filters folder.

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
Medscape	After selecting the desired records and adding them to your clipboard, click the *Save or Email Clipboard* link. Save or email your clipboard in PC or Mac MEDLARS format as a plain text (*.txt) file.	MEDLINE (Medscape) filter
NERAC	Save your file as plain text (*.txt).	NERAC
OCLC FirstSearch	1. Mark the records you wish to download. 2. In the navigation pane, click *Export*. 3. Click the radio button next to "The marked records" or "A range of records." 4. Click the radio button next to "EndNote." 5. Click *Export* and save to a Text file.	Various OCLC filters are provided in the EndNote Filters folder.
Ovid	1. Search and then mark the references you wish to download. 2. Scroll to the bottom of the screen and select the following options: ♦ Fields: You *must* select "Complete Reference." ♦ Citation Format: Select Reprint/Medlars (or Direct Export, if available). 3. Click *Save*, and save the file as plain text (*.txt).	The appropriate Ovid filter will be selected automatically when using the *Direct Export* option. If you are using Ovid's multiple database searching, you must select the *Direct Export* citation format. If you save as Reprint/ Medlars, you must Import into EndNote with the appropriate Ovid filter.
ProQuest	1. Select the desired references and then click the "My Research Summary" tab. 2. Click the "Documents and Bibliography" tab. 3. Choose "Export," then either "Export directly to ProCite, EndNote or Reference Manager," or "Download in a format compatible with ProCite, EndNote, Reference Manager and RefWorks." If you choose the former, make sure your data is displayed in a tagged format before saving as a text file.	ProQuest filter
PsycINFO **http://www.apa.org**	After marking the records you wish to download, choose *Full PsycINFO Record* then click the *Display Marked Records* button. Select the text, then copy and paste it into a text editor, saving the file as plain text (*.txt).	Use the PsycINFO (APA) filter.

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
PubMed	From the drop-down list next to "Display," choose *MEDLINE*. From the "Send to" list, choose *File*. Use your browser to save the page as a plain text file (*.txt). You can check current download instructions for NLM PubMed at any time at http://www.pubmed.gov.	PubMed (NLM) filter
SilverPlatter WebSPIRS	Once you've obtained your search results, click *Save*. Select the following "Save Records" options: Which fields?: All fields Include: Record number and database name Field labels: Short labels. Click the *Save Records* button. Use your Web browser to save the page as "Text Only" (do not save in HTML format).	Various SilverPlatter filters are provided in the EndNote Filters folder.
STN	Set your communication software's options to capture text to a file. Type the command "Display All".	Various STN filters are provided in the EndNote Filters folder.
UnCover (Ingenta)	Using your email software, save references emailed to you as a "Plain Text" or "Text Only" file.	UnCover (INGENTA)
VHL (Virtual Health Library)	1. After selecting the desired references, scroll to the bottom of the page and click "Your collection" (or "Su sellecíon"). 2. Cancel the print dialog, and then save the screen as a plain text file.	Various VHL filters are provided in the EndNote Filters folder.
Web of Knowledge Web of Science	Display your marked references. Then, look under Output Records and select the option to output *Full Records*. Next, click *Export to Reference Software* to have the references exported directly to EndNote. (See "Direct Export from Web Pages" on page 80.) You may also choose *Save to File* to save the references to a text file and import them into EndNote.	ISI-CE filter
Wilson	1. Click *Print Email Save*. 2. Click *Export to Bibliographic Software*. 3. Choose *The EndNote Filter* and click *Export*. 4. Save to a text file.	WilsonWeb filter
WorldCat (OCLC FirstSearch)	1. Mark those references to be saved and click *Export*. 2. Choose Text File. 3. Click *Export*.	WorldCat (OCLC) filter

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. All you need to do is choose the EndNote library into which the data should be imported. This "direct export" or "direct download" method does away with the additional steps of saving the references to a text file, and then importing that file with the appropriate filter.

The systems listed below provide a direct export of references into EndNote. A detailed table of instructions can be found in Appendix D of the full EndNote manual. 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	Oxford Press Journals
Canadian Journal of Communication	Pacific Northwest Labs
CCLR	Patent Cafe
Delphion	PILOTS
EBSCO	PNAS Online
EI Engineering	ProQuest
Elsevier	RLG
EMBASE	Science Magazine
ERIC	Scopus
ESDS Government	St. John of God, Ireland
Google Scholar	Stanford University's Highwire Press
HAPI	Telemed
IEEE	Thieme
JAMA	Web of Science
JISC	WebFeat
JSTOR	WilsonWeb
Karger Publishing	

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

If you are finished working with EndNote for now, go to the *EndNote* menu and choose *Quit EndNote* (Macintosh) or go to the *File* menu and choose *Exit* (Windows) to close the program.

Related Sections in the Full Manual

See these sections in the full EndNote.PDF manual for information related to this portion of the tour:

♦   See Chapter 7, "Importing Reference Data into EndNote," for details about import options and about importing references from other bibliographic software programs.

♦   Read Chapter 16, "Filters," to learn how to create or modify filters that map downloaded references to corresponding fields in EndNote. You can enter tags and map them to specific EndNote fields.

♦   See Appendix D, "Direct Export Formats and Import Formats" for detailed tables of instruction for importing reference data from various online systems.

Chapter 8: Searching an EndNote Library and Previewing a Bibliography

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

♦ Search an EndNote library for a subset of references.

♦ Preview a bibliography in EndNote.

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

Open the Paleo Library

If EndNote is not already running, start it and open the Paleo library (Paleo.enl), as shown under "Start EndNote" on page 37.

Search for a Set of References

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

To search for references:

1. From the *References* menu, choose *Search References*.

2. Use the Action menu (Macintosh) or *More Options* button (Windows) to display additional search options.

toggles to display *More* options or *Less* options
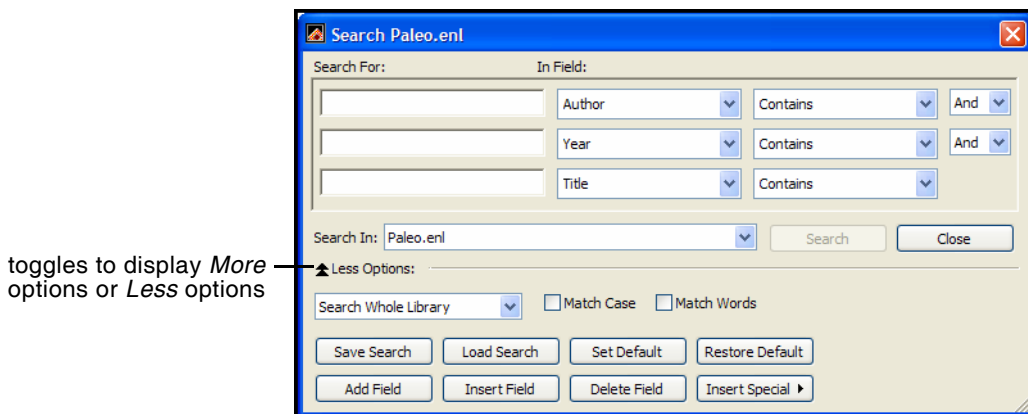
3. On the first search line:

   a. Type "extinct" as the first **search term**.

   b. In the first drop-down list, the **field list**, select *Any Field*. This means that EndNote will find references that have the string "extinct" in any field.

c. In the next drop-down list, the **comparison list**, the *Contains* comparison operator means that EndNote will search for this string of text anywhere in the field.
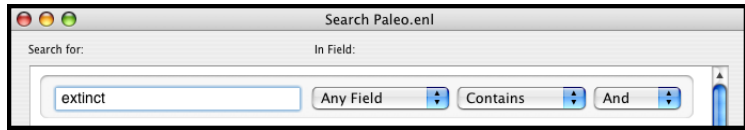
Next, set up the search to find references dated from 1990 to 1999.

4. Type 1990 as the search term for the second search line. From the **field list** in the second search line, choose *Year*; and from the **comparison list**, choose *Is greater than or equal to*.

5. If you do not have a third search line available, click the *Add Field* button found along the bottom of the window.You can also click and drag the bottom right corner of the window to size it larger or smaller.

6. Type 1999 as the search term for the third search line. From the **field list** in the third search line, choose *Year*; and from the **comparison list**, choose *Is less than or equal to*.

7. Notice the "And, Or, Not" logical operator list at the end of each search line. Select the "And" logical operator between the three search lines.

Your search window should look like this:
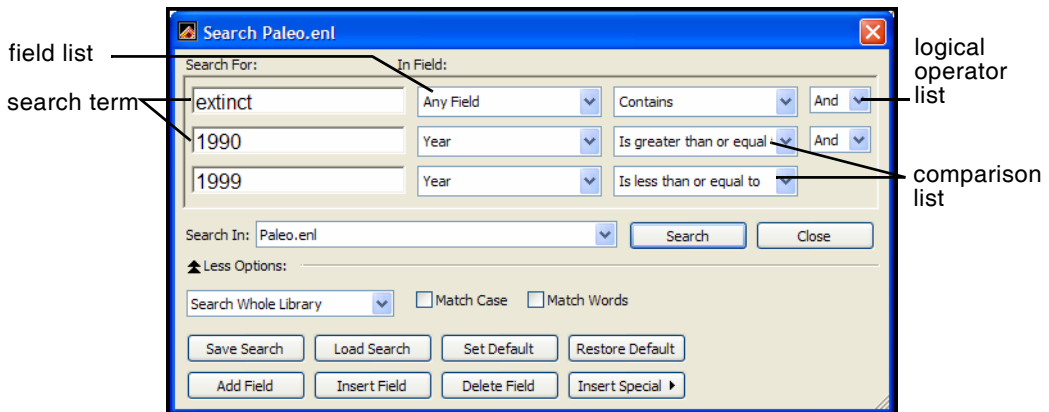
This search will find all references containing the text "extinct" that also were published between 1990 and 1999.

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

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

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

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

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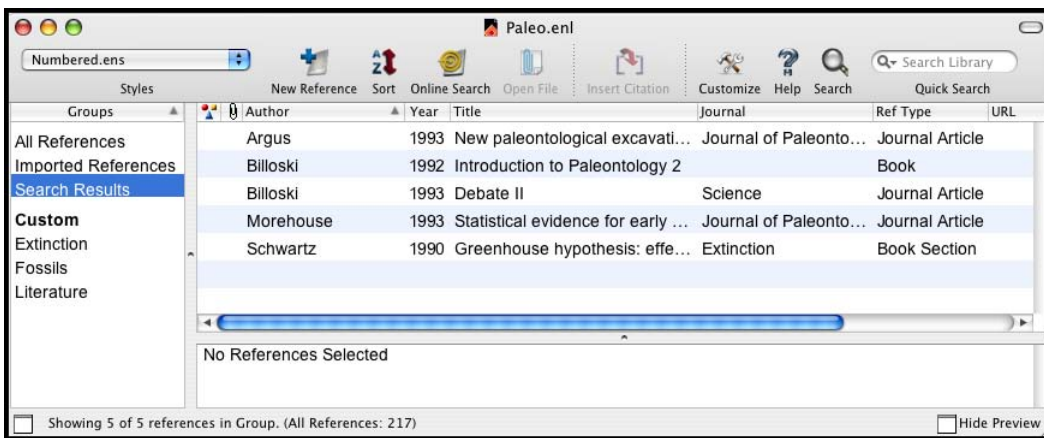
The status area at the bottom of the Library window should read, "Showing 5 of 5 references in Group."

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

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

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

Preview the Found References

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

To preview the bibliography:

1. On the toolbar, select an output style from the output style list. For this example, choose the *Numbered* style.

2. If you want to further limit the references to preview, select (highlight) those references you want to include. To select all references in the list, first click in the list, then go to the *Edit* menu and choose *Select All*.

3. **Macintosh**: From the *File* menu, choose *Print*. Then, on the Print dialog, choose *Print Preview* to display the bibliography on your computer screen.

   Windows: From the *File* menu, choose *Print Preview* to display the bibliography on your computer screen.

Paleo.enl   Page 1

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

---

4. You can use the buttons along the top of the window to walk through the pages of the bibliography.

5. When you are done previewing, click the *Close* button.

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

This concludes this part of the guided tour. Chapter 8 demonstrates how to write a paper and cite references and figures in Microsoft Word.

If you are finished working with EndNote for now, go to the *EndNote* menu and choose *Quit EndNote* (Macintosh) or go to the *File* menu and choose *Exit* (Windows) to close the EndNote program.

Related Sections in the Full Manual

See these sections in the full EndNote.PDF manual for information related to this portion of the tour:

♦ More information about searching the EndNote library and saving references in groups can be found in Chapter 8, "Searching in EndNote and Using Groups."

♦ Read Chapter 12, "Creating an Independent Bibliography," about creating reference lists directly from your EndNote library, including printing your bibliography and saving your bibliography to an RTF file.

♦ See Chapter 15, "Bibliographic Styles," for information about modifying and selecting styles.

Chapter 9: Using EndNote While Writing a Paper with Microsoft Word

> **NOTE:** Continue with this part of the tour only if you use Microsoft Word X or 2004 (Macintosh) or Microsoft Word 2000, XP, 2003, or 2007 (Windows). If you use a different word processor, or if you have an older version of Word, turn to Chapter 11 in the full EndNote.PDF manual to learn how to cite EndNote references and create bibliographies in your papers.

EndNote's Cite While You Write feature inserts EndNote commands into Word's *Tools* menu (or on an EndNote tab in Word 2007 for Windows) 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 tour, you will learn how to:

♦ Insert EndNote bibliographic citations into your paper and create a bibliography.

♦ Edit citations to suppress author names and add cited pages.

♦ Insert EndNote figure citations into your paper. (This section uses the figure reference that was inserted while following Chapter 5.)

Open the Paleo Library

If EndNote is not already running, start it and open the Paleo library (Paleo.enl), as shown under "Start EndNote" on page 37.

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

Open a Microsoft Word Document

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

While we are not using one for this tour, EndNote does include manuscript templates that make it easy to set up your paper for electronic submission to a publisher. When you use one of these templates to start your paper, many formatting issues are already set up for your target publication, such as proper margins, headings, pagination, line spacing, title page, font type and size, etc. For more information about using manuscript templates, see "Using Predefined Manuscript Templates" in Chapter 10 of the full EndNote.PDF manual.

Cite EndNote References

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

To start writing your paper and inserting citations:

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

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

    Now you are ready to insert a citation.

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

    Tools > EndNote X1 **submenu**
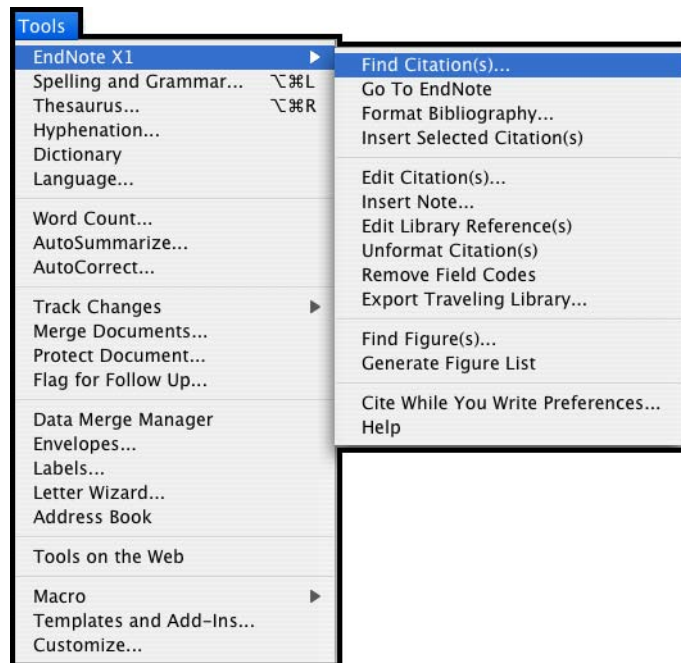
    Word 2007 for Windows *EndNote* **tab**
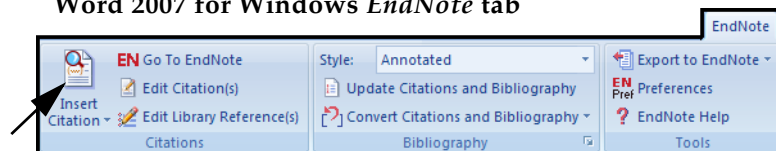
3. The EndNote Find Citations dialog appears. Type the author name "Morehouse" in the "Find" box and click *Search*.

   EndNote lists the matching references. In this case, a single reference matches the search.
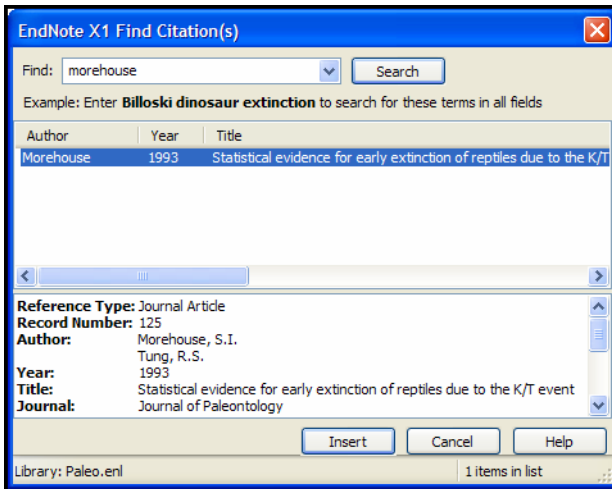
4. Click *Insert* to insert the selected reference as a citation. There may be a delay the first time Word communicates with EndNote for the document.

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

5. Add more text to the paper:

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

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

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

EndNote X1 Find Citation(s)		

Find: 1987   (Search)

Example: Enter **Billoski dinosaur extinction** to search for these terms in all fields

Author ▲	Year	Title
Billoski	1987	Triceratops extinction linked to asteroid collision
Izett	1987	Authigenic "spherules" in K–T boundary sediments
Kreutzer	1987	Untersuchungen über die Regulation der Bildung g
McCormick	1999	Antarctic measurements of ozone by Sage–II in the
Pollastro	1987	Mineralogy and petrology of the Cretaceous–Tertia
Prinn	1987	Bolide impacts, acid rain, and biospheric traumas a
Rensberger	1987	Cracks in fossil enamels resulting from premortem

Reference Type: Journal Article
Record Number: 46
Author: Billoski, T.V.
Year: 1987
Title: Triceratops extinction linked to asteroid collision
Journal: Science
Volume: 79
Issue: 7
Pages: 75–76
Keywords: Extinction

(Help)   (Cancel)   (Insert)

Library: Paleo.enl   10 items in list

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

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

Your document text should now look like this:

The fossil in question was generally regarded to be the 220 million year-old remains of tyrannosaurus. Several years ago, however, Morehouse overturned this hypothesis with the discovery of yet another species. [1] It is now the undisputed progeny of the species at hand. [2]

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

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

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

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

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

Select a Bibliographic Style

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

To select the bibliographic style used for formatting:

1. From Word's *Tools* menu, go to the *EndNote X1* submenu and choose *Format Bibliography*. **Word 2007 for Windows**: on the

EndNote tab, in the Bibliography group, click the bottom corner arrow.

Tools > EndNote X1 **submenu**
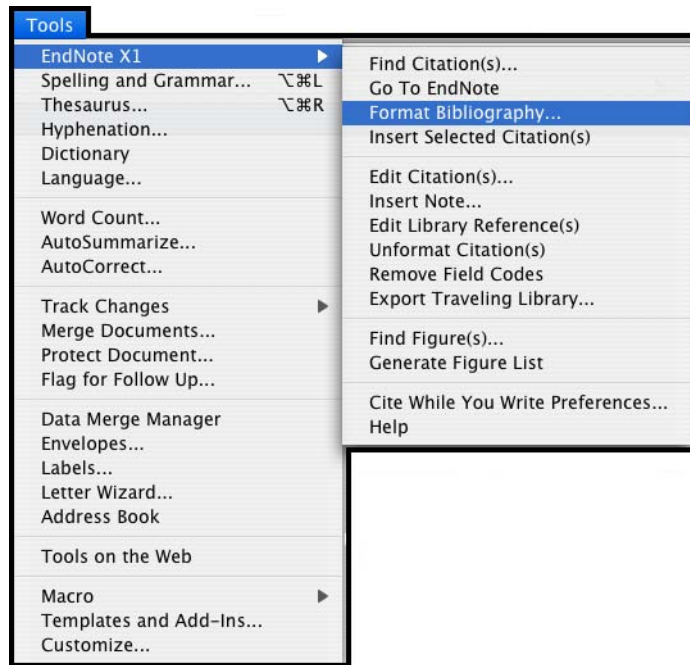
Word 2007 *EndNote* **tab**
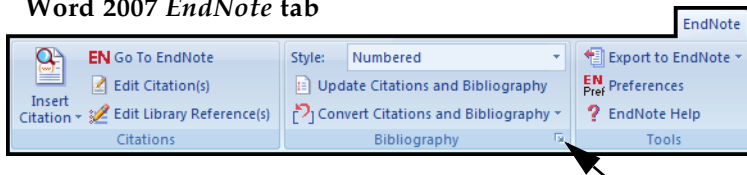
A Format Bibliography dialog appears, where you can select a bibliographic style.
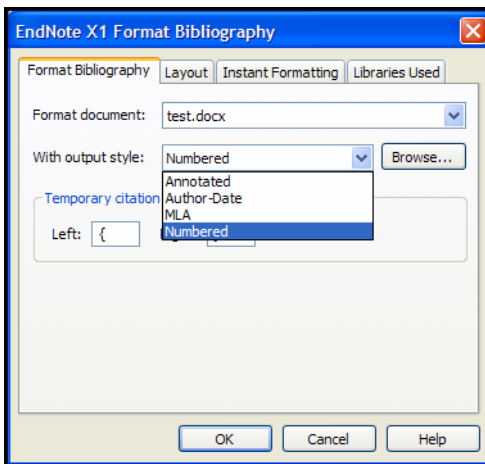
Styles contain instructions for how EndNote will format citations and the bibliography. For the previous example, we illustrated the Numbered style, which sequentially numbers citations and then inserts a numbered reference list at the end of the paper.

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

2. For this example, click the *Browse* button next to "With output style" to display the list of output styles supplied with EndNote.

3. Select the *APA 5th* style and click *OK*.

4. Click *OK* to leave the Format Bibliography dialog.

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

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

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

Edit a Citation

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

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

To edit an individual citation:

1. Click anywhere on the Morehouse citation.

2. From the *Tools* menu, go to the *EndNote X1* submenu and then *Edit Citations*. **Word 2007 for Windows**: On the EndNote tab, in the Citations group, select *Edit Citations*.

NOTE: Another way to select *Edit Citation* is to CONTROL+click (Macintosh) or right click (Windows) with your mouse and select *Edit Citation* from the context-sensitive menu.

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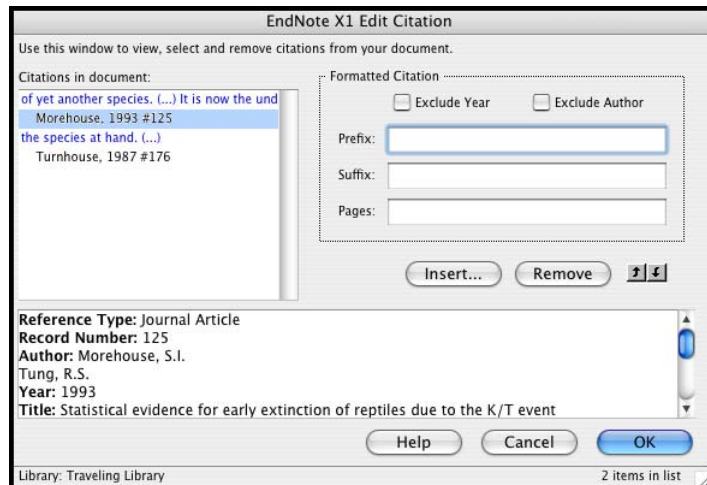
3. In the Formatted Citation section, select the *Exclude Author* box.

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

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

---

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

The fossil in question was generally regarded to be the 220 million year-old remains of tyrannosaurus. Several years ago, however, Morehouse overturned this hypothesis with the discovery of yet another species. (1993, pp. 34-35) It is now the undisputed progeny of the species at hand. (Turnhouse, 1987)

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

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

Insert Figure Citations

Next you are going to insert two figure citations—one inserted and numbered as a figure, and one inserted and numbered as a table. This section uses the reference inserted in Chapter 5: "Entering a Reference," as well as another reference in the Paleo library.

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

To find and insert figure citations:

1. First, add more text to your paper:

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

   Now you are ready to insert a figure citation.

2. From the *Tools* menu, go to the *EndNote X1* submenu and then *Find Figure(s)*. **Word 2007 for Windows**: On the

EndNote tab, in the Citations group, click on the *Insert Citation* text and select *Find Figure*.

The EndNote Find Figures dialog appears.

3. Type the search term "bird" in the "Find" box and click *Search*.
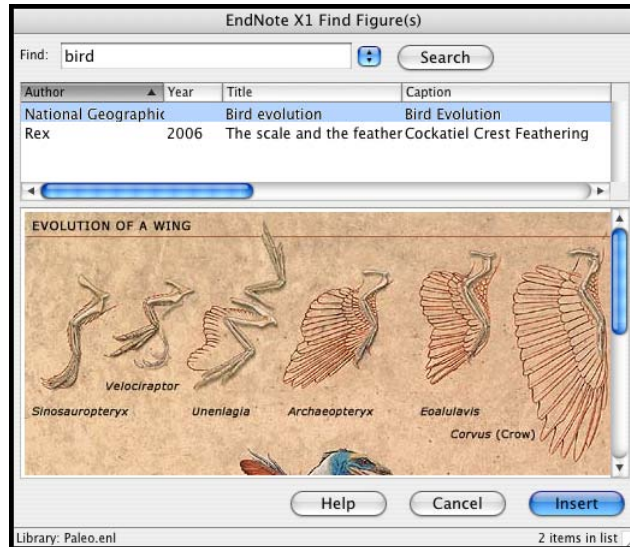
EndNote lists only references that match the search text *and* contain an image. As you highlight a reference, the graphic stored within the reference is displayed below the reference list. (Object files display a file icon.)

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

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

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

---

5. Next enter the text:

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

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

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

    The EndNote Find Figures dialog appears.

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

    EndNote displays a single matching reference. The file attachment icon shows that the figure is in a Microsoft Excel document.
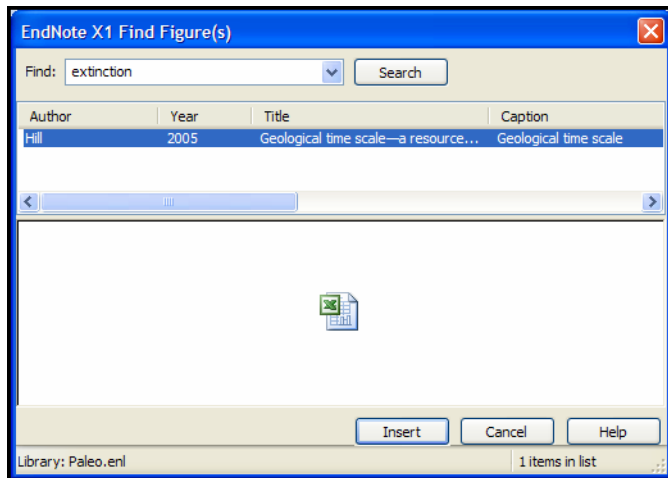
8. Click *Insert* to insert the citation. (It may take some time for Word to import the file.)

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

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

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

10. You may want to resize your figures to fit on the page appropriately. Click on an image, and then hold down the Shift key while you drag a corner of the figure to resize it proportionally.

List of Tables

Table 1.

Geological time scale

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

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

List of Figures

Figure 1. Cockatiel Crest Feathering
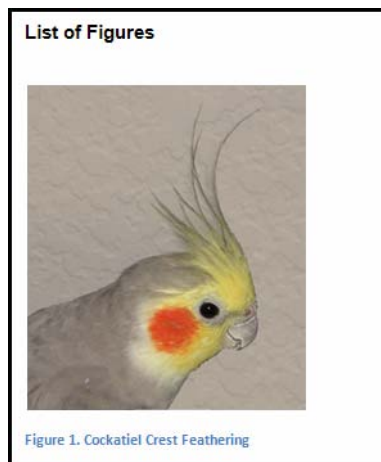
As you are working, remember to often *Save* your document. You can continue adding text, bibliographic citations, and figure

citations to the paper, and EndNote will continue adding to the lists of references, figures, and tables!

This completes the guided tour, although you may want to continue experimenting with the Paleo library.

To close Microsoft Word: In Word, go to the *Word* menu and choose *Quit Word* (Macintosh) or go to the *File* menu and choose *Exit* (Windows). **Word 2007 for Windows**: Click the Office icon and then *Exit Word*.

To close the EndNote program: In EndNote, go to the *EndNote* menu and choose *Quit EndNote* (Macintosh) or go to the *File* menu and choose *Exit* (Windows).

Related Sections in the Full Manual

See these sections in the full EndNote.PDF manual for information related to this portion of the tour:

♦ The process of citing references and figures and creating bibliographies with Cite While You Write is covered in Chapter 10.

♦ More than 2,800 styles are installed in EndNote's Styles folder. To see a list of them organized by discipline, choose *Output Styles* from the *Edit* menu and select the *Style Manager*. See "Accessing Styles in Other Places" in Chapter 15 for information about how to access other styles.

♦ Chapter 15, "Bibliographic Styles," includes instructions for editing output styles.

Index

A

B

C

D

E