

EndNote® v9

...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

EndNote®

Version 9 for Macintosh and Windows

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NOTICE REGARDING LEGAL USE OF DOWNLOADED REFERENCE DATA

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

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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 Help (Macintosh) or F1 (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 RTF Document Scan with other word processors.

See “What’s New in EndNote 9” 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 9, 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 OPTION+click (Macintosh) or right-click (Windows) menu, from a toolbar or palette icon, or with a keyboard command. In most cases, this manual gives instructions for selecting commands from the main menus. If a menu command has a keyboard equivalent, the keyboard command appears next to the menu item.

The following representations for key combinations are used:

Macintosh

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

Windows

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

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 for orders and shipping/billing status.

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).

Our hours are Monday–Friday, 8:00 am – 5:00 pm Pacific Time.

Phone: (408) 987-5609 (country code is 01)

Web/Email: <http://www.endnote.com/encontact.asp>

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 (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 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, which we recommend, 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 9

EndNote 9 includes these new and enhanced features:

- ◆ Connect to virtually any data source worldwide with expanded record syntax and text encoding Unicode formats for connection files.
- ◆ Enjoy enhanced performance and notification for processor-intensive tasks.
- ◆ Use new and updated connection files, import filters, and output styles.
- ◆ Easily move Reference Field and Type information with the RefTypeTable.xml file.
- ◆ Notice improved handling of Macintosh OS X default font settings.
- ◆ Navigate with new and improved palettes (toolbars) for Macintosh OS X.
- ◆ Use Spotlight searching with Macintosh OS X 10.4 and later.

Chapter 1: Macintosh EndNote Installation

Before You Install EndNote

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.

Program Requirements

System Requirements

EndNote runs under the Macintosh operating system versions 10.3.6+ 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 website at 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 2005, EndNote for Macintosh is compatible with:

- ◆ Microsoft Word X and 2004
- ◆ RTF files created with most word processors, including: WordPerfect, OpenOffice, and FrameMaker

Microsoft Word Documents

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 update to 10.1.2, which is available from the Microsoft website at www.microsoft.com.
- ◆ Microsoft Word must be correctly installed on your computer *prior to* installing 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 Documents

For word processors other than Word, write your paper, insert in-text citations, then save to an RTF file and use EndNote's RTF Document Scan 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 installation program 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

To install EndNote:

1. 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 disk image to display an EndNote 9 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 9 Installer to display an EndNote 9 folder.

3. Drag the EndNote 9 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 with OS X 10.4 (Tiger) or later.

4. Double click on the Applications folder, then the EndNote 9 folder, then the EndNote 9 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!

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.

Personalize EndNote: Enter your name, organization, and EndNote serial number. By entering this information, you will find it easily accessible should you need it later.

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

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” on page 527.

To make sure the EndNote program installed correctly, see “Checking Your Installation” on page 18.

NOTE: If you use a non-English version of Word, see page 19.

Installed Files

The EndNote installation includes:

- ◆ *EndNote 9* application
The application includes the Help file. Select *EndNote 9 Help* from EndNote’s *Help* menu, or click the *Help* key on your keyboard while using the EndNote program. Clicking the *Help* key brings up a context-sensitive topic.
- ◆ *EndNote Read Me* text file containing late-breaking news
- ◆ *EndNote.pdf* full electronic manual
- ◆ *GettingStartedGuide.pdf* gives installation instructions and a tour of the program
- ◆ *Examples* folder
This folder contains example files to follow the Guided Tour in Chapter 3, and to experiment with while learning EndNote.
- ◆ *Styles* folder
This folder contains the full collection of over 1,300 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 the three journal abbreviation term lists: Chemical, Medical, and Humanities. These three 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 various language or discipline-specific dictionary files for spell checking.
- ◆ *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 RTF Document Scan commands for the *Services* menu of other software applications.
- ◆ *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 or re-install 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.

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 RTF Document Scan to insert and format references in an RTF 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.
2. Start the EndNote program.
3. From the *EndNote* menu, choose *Customizer*.
4. On the dialog titled “Component Selection,” select the components you want to install 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 9 folder:

- ◆ *Examples* folder
- ◆ *Styles* folder
- ◆ *Connections* folder
- ◆ *Filters* folder
- ◆ *Terms* folder
- ◆ *Spell* folder

For a description of these folders, see “Installed Files” on page 14.

If you want to replace a single file, copy it from the installation CD or disk image to the appropriate folder in your EndNote 9 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

You do *not* need to uninstall any earlier version of EndNote to upgrade it. EndNote 9 is installed into a new EndNote 9 folder. Back up custom styles, import filters, and connection files as well as any Word documents that use Cite While You Write before you begin.

After installing EndNote 9, you will have two folders, with each containing an EndNote program. Copy your libraries from your old EndNote folder to your new EndNote 9 folder.

If you have any customized styles, filters, or connection files, you should also copy them to the Styles, Filters, or Connections folders in the EndNote 9 folder. EndNote 9 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.

Once you have removed your customized files and libraries from the old EndNote folder, and EndNote 9 is up and running, you can drag the remaining items in the old EndNote folder to the Trash. Be careful not to delete any libraries, papers, or other items that you need.

NOTE: To see what features have been added to EndNote, see “What’s New in EndNote 9” on page 7.

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. Then, use the new version of EndNote to format the document again. From Word’s *Tools* menu, choose *EndNote 9* and then *Format Bibliography*. This updates the document to work with EndNote 9.

Opening and Converting Old EndNote Libraries

EndNote 9 automatically converts libraries created with earlier versions of Endnote (versions 5, 6, or 7) to the version 8/9 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 format, and leaves the original library intact.

NOTE: EndNote 9 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 9 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 9, it is converted to the version 8/9 format.

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

NOTE: Customized reference types, temporary citation markers, and display fonts are all carried over from earlier versions of EndNote for use with EndNote 9.

Checking Your Installation

To run EndNote, double click the EndNote 9 icon found in the EndNote 9 folder.



EndNote 9.0

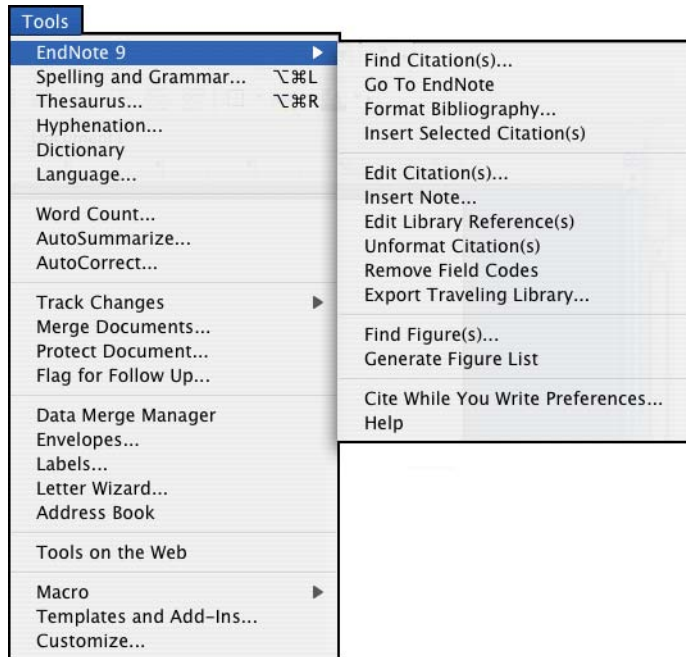
A dialog will ask you to open a reference library file. Choose *Cancel*.

To check the version number of EndNote, 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 9* submenu in Word.

EndNote 9 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 20

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 9, 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.

Next, copy Cite While You Write files to Word's Startup Folder:

From this folder:

```
EndNote 9:Cite While You Write
```

copy these files:

```
EndNote 9 CWYW Commands.dot (Word X and 2004)
```

and

```
EndNote 9 CWYW Word X (Word X) or  
EndNote 9 CWYW Word 2004 (Word 2004)
```

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 19.

Then, copy Manuscript Templates to Word’s Templates folder:

Copy the template files from this folder:

EndNote 9: Templates

to Word’s Templates folder. For example:

Microsoft Office X:Templates:EndNote

or

Microsoft Office 2004:Templates:EndNote

Updating EndNote Files

You can update EndNote 9 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 website at 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. From the Component Selection list, select "Uninstall."
5. Click *Next*.
6. Click *Exit*.
7. Drag the EndNote 9 folder to the trash.

To manually uninstall EndNote:

1. Start by dragging the entire EndNote 9 folder to the trash.
2. To remove Cite While You Write files, delete these EndNote files from Microsoft Word's Startup folder:

EndNote 9 CWYW Commands.dot

and

EndNote 9 CWYW Word X (Word X)

or

EndNote 9 CWYW Word 2004 (Word 2004)

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

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.

Program Requirements

System Requirements:

EndNote runs under the following operating systems:

- ◆ Windows 2000
- ◆ Windows XP

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 *Connect* command to search remote 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 2005, EndNote for Windows is compatible with:

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

Microsoft Word:

Microsoft Word uses Cite While You Write, which inserts an EndNote submenu of commands on Word's *Tools* menu. It also 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.

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 account when you run the EndNote installation. This feature can be used with a shared copy of Word or on a network.

In order for Cite While You Write to install properly:

- ◆ Microsoft Word 2000, XP, or 2003 must be correctly installed on your computer *prior to* installing 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 Documents:

For word processors other than Word, write your paper, insert in-text citations, then save to an RTF file and use EndNote's RTF Document Scan 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 Palm OS.

Requirements for running EndNote for the Palm Operating System include:

- ◆ Handheld device
- ◆ Palm Operating System 4.1-5.x
- ◆ Serial or USB communication for HotSync operations
- ◆ 16 MB RAM

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

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!

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.

Registration Information (full version only; this will not appear for the Demo version): Enter your name and EndNote serial number. By entering this information, you will find it easily accessible should you need it later.

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

Select Installation Type: The *Typical* installation is selected by default, and is recommended. If you wish, you can select *Complete* to make sure you install all options, or *Custom* to hand pick the file groups to install.

Select Destination: By default, EndNote is installed in the C:\Program Files\EndNote 9 folder. The Demo version is installed in the C:\Program Files\EndNote 9 Demo folder. You can use the *Browse* button to change the folder selection if you wish.

NOTE: 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 9 Demo version.

Select Components: (Custom installations only) If you selected a Custom installation, see “Selecting Components” on page 27.

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 9 is Successfully Installed” dialog, 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 30.

Custom Installation Options

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 25.
2. On the dialog titled “Select Installation Type,” select *Custom*.
3. When you get to the dialog titled “Select Components,” read the section below, “Selecting Components” 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 9 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 Components” dialog, read the section below, “Selecting Components” to determine what you would like to select/deselect for installation.

Selecting Components

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
- ◆ EndNote Help
- ◆ PDF Manual
- ◆ Additional Converters
- ◆ Sample Files

Word Templates/Add-ins:

- ◆ Add-in for Microsoft Word
- ◆ Templates 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 9. See “Automatically Updating Files” on page 31.

Install the upgrade just as you would a new installation. See “Installing EndNote” on page 25. By default, EndNote 9 is installed into the C:\Program Files\EndNote 9 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 9 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 9 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 9, 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 9.

- ◆ **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 9. 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.

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 9 automatically converts libraries created with earlier versions of Endnote to the version 8/9 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 format, and leaves the original library intact.

NOTE: EndNote 9 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 9 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 9, it is converted to the version 8/9 format.

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

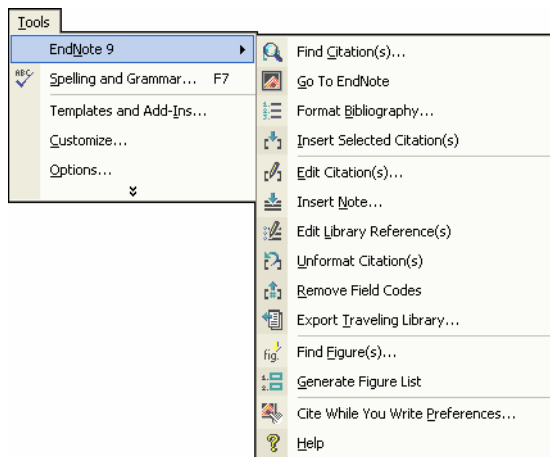
A dialog will ask you to open a reference library file. Choose *Cancel*. To check the version number of EndNote, choose *About EndNote* from the *Help* menu. Click the splash screen to clear it.

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 and click on Word's *Tools* menu. In Word 2000, XP, or 2003 you should see EndNote commands on an *EndNote 9* submenu.

Word 2000, XP, or 2003 *Tools* menu and *EndNote 9* submenu



NOTE: If you have trouble installing Cite While You Write support, see “EndNote Commands Do Not Appear on Word’s Tools Menu” in the Troubleshooting appendix of the full manual (EndNote.PDF found in your EndNote folder).

Automatically Updating Files

You can automatically update EndNote 9 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 www.endnote.com. We continually update output styles, filters, connection files, and Microsoft Word templates.

Uninstalling EndNote

Uninstall EndNote by using the "Add/Remove Programs" function in the Windows Control Panel.

NOTE: For network installations, see Chapter 20, "Using EndNote On a Network" in the full manual.

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*.
2. In the list of currently installed programs, select *EndNote 9*.
3. 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:

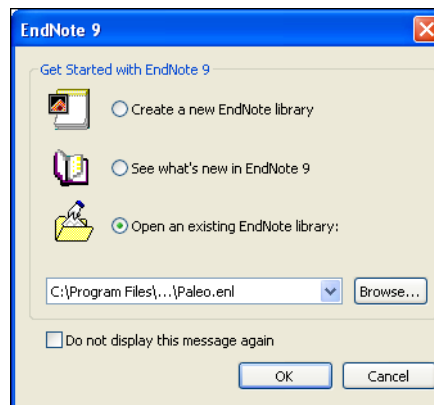
1. **Macintosh:** Open the EndNote 9 folder and double-click the EndNote program icon. By default, the EndNote 9 folder is installed in the Applications folder on your hard drive.



EndNote 9.0

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

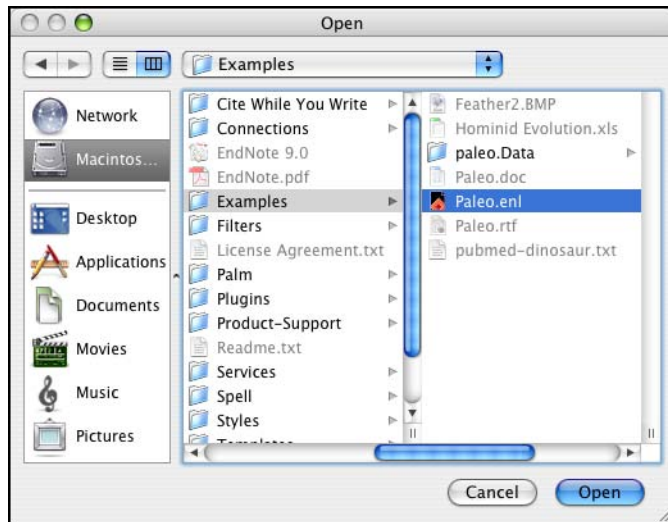
A dialog appears prompting you to open a reference library.



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.

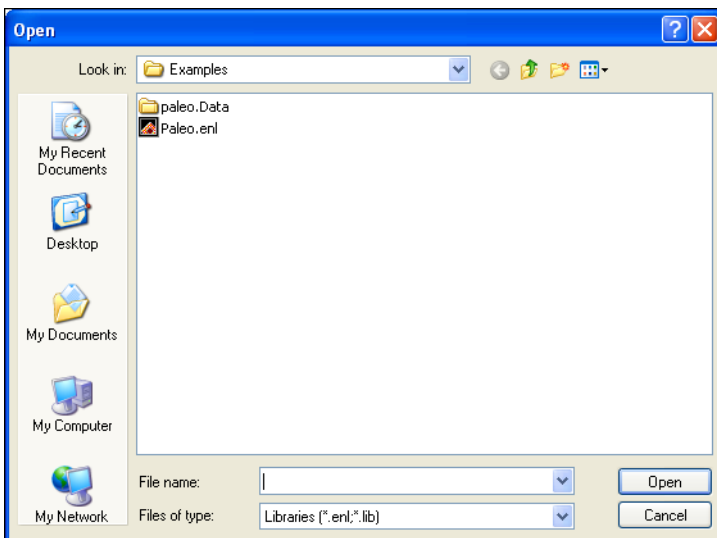
Macintosh: Select the Examples folder that was installed in the EndNote 9 folder and click *Open*. Then, select the Paleo.enl library (your folder settings may or may not be set up to show the .enl extension.) and click *Open*.



Windows: Use the “Look in:” list to find the EndNote 9 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 9 folder.

Select 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*.

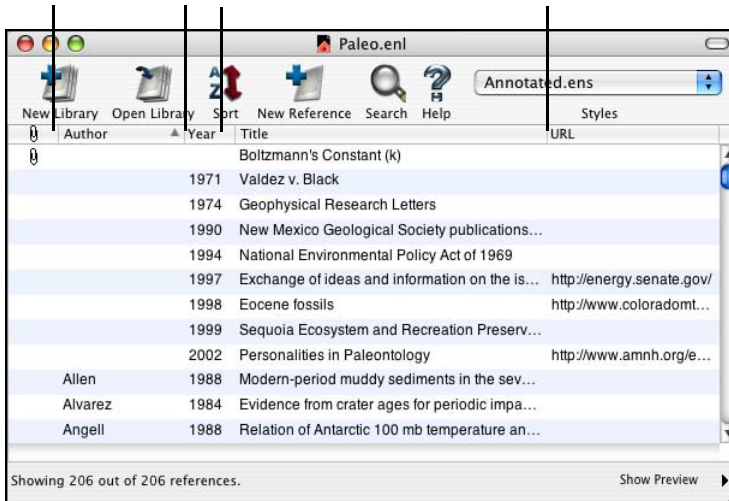


NOTE: You can open a library from within EndNote by choosing *Open* from the *File* menu.

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 set column widths.



The Library window displays a multi-column list. By default, the first column shows a paper clip for references that include attached graphics, figures, or files. Then, the first author's last name, the year, the title, and the URL are displayed for each reference. 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, HOME, END, and ARROW keys.

Preview References

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

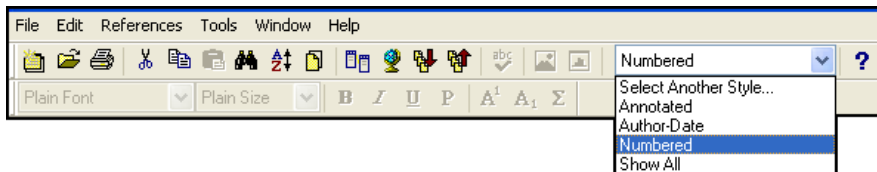
To preview a reference:

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

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

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

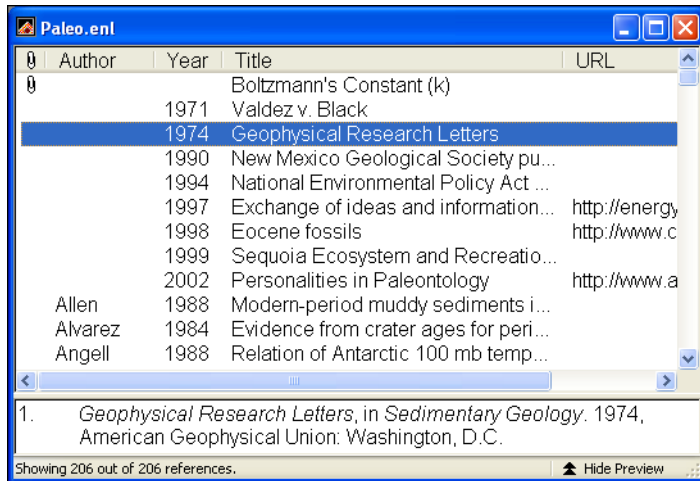
Windows toolbar



Macintosh palette



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



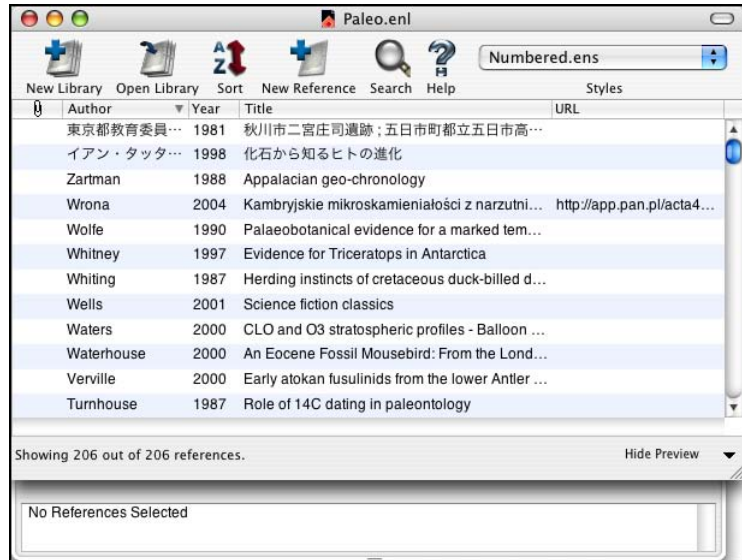
When the preview pane is showing, a *Hide Preview* button is available at the bottom of the window. You can click *Hide Preview* to hide the preview pane if you wish. The name of the button will toggle to *Show Preview*.

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."

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

Select and Open a Reference

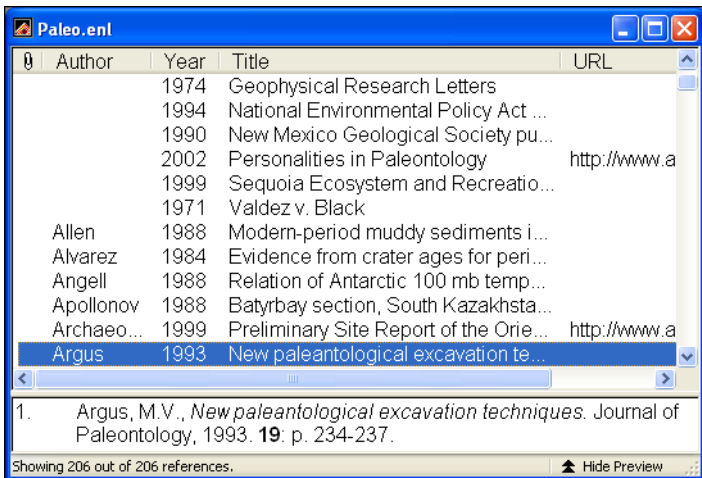
To work with specific references you must first select them in the Library window.

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:

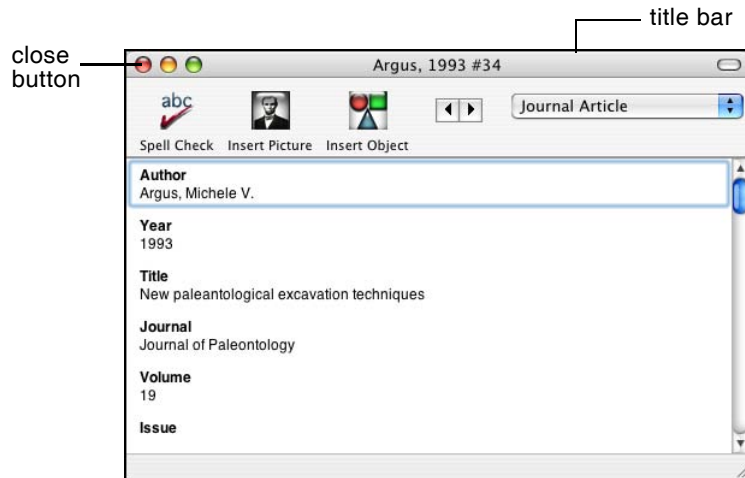
1. Select the first Argus reference in the list by typing "arg" without pausing between letters.



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.



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.

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.

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

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, 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.
- ◆ To learn more about sorting, see “Sorting the Library” 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 33.

Access EndNote Preferences

To view or change the EndNote preferences:

From the *Endnote* 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.

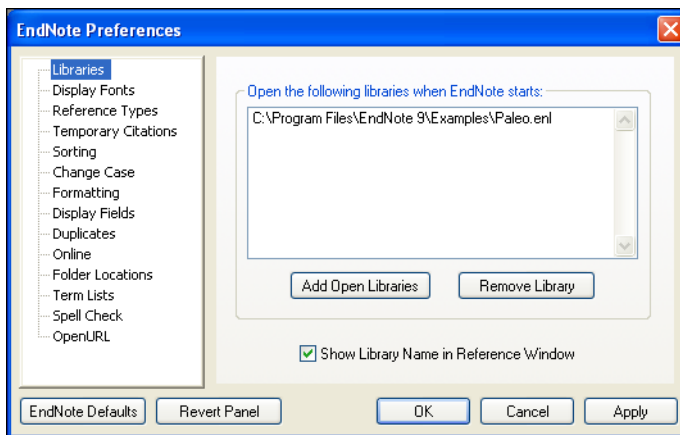
Set a Default Library

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* 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.

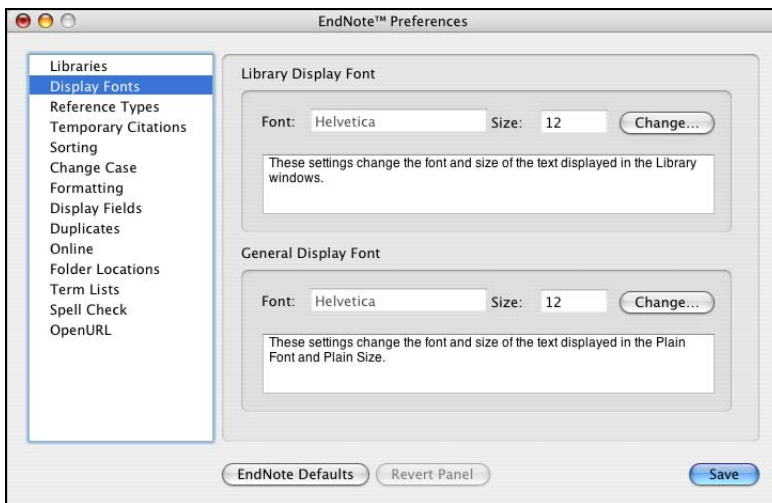
To change the display fonts:

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 Display Font determines the font and size of the references listed in the Library window.

The General Display Font changes the font used to display all other text that is typed into EndNote (such as in the Reference or Style windows). The General Display Font is also used for most of the previews and information panels in

EndNote, as well as for bibliographies that are printed or copied directly from EndNote.



3. Under *Library Display Font*, 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. Under *General Display Font*, 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* to save your changes and 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 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 References

In this part of the Guided Tour you will learn how to:

- ◆ Enter references into a library.
- ◆ Insert picture files and object files into references.

In this part of the tour, you are going to enter references: first a typical book reference, and then references that contain images.

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 33.

Create a New Reference

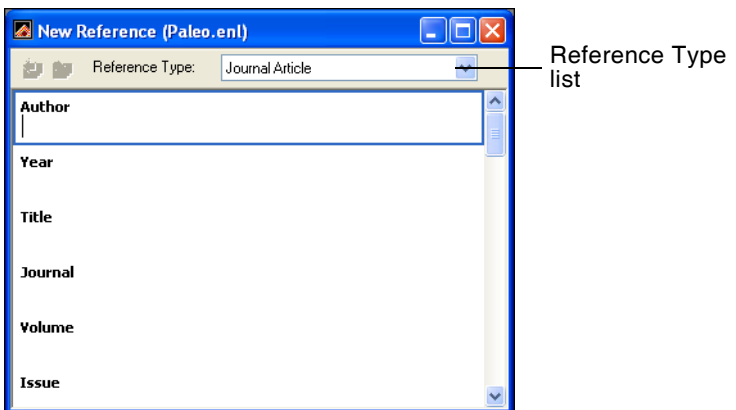
There are various ways to add references to an EndNote library:

- ◆ 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 Remote Databases.”
- ◆ 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.

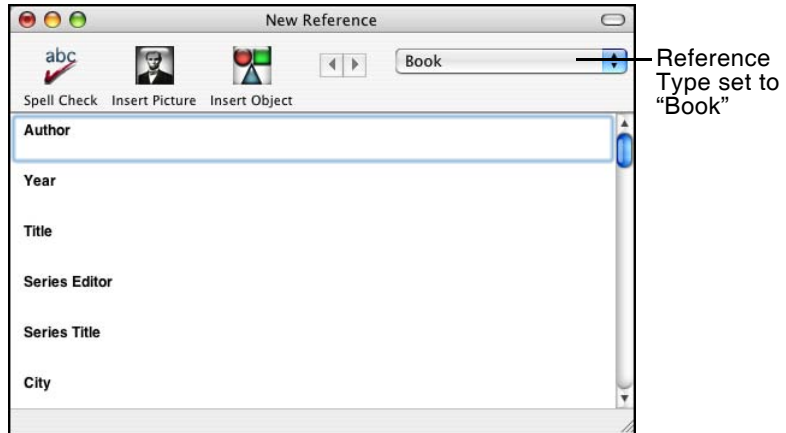
Once a library is open, you can add a new reference to it:

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



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. For this example, create a Book reference.

2. Click the *Reference Type* list and choose *Book*.



You are now ready to enter reference information, beginning with the author names. Author names can be entered two ways: either "First Middle Last" such as "Carol Margaret Jacobson" or "Last, First Middle" such as "Jacobson, Carol Margaret." Individual author names *must* be entered one per line.

3. With the cursor in the Author field, type:

Jacobson, Carol

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

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

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

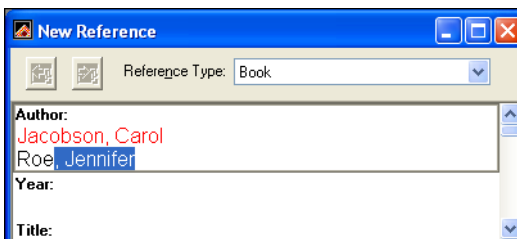
The name appears in red text to indicate that it is a new name in the Author term list for this library. When you close the reference, it will be added to the Author term list and the red text will change to black. You can read more about term lists

(and how to turn these options on or off) in Chapter 9 of the full manual.

5. Now enter the second author's name:

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.



6. Press the TAB key to accept EndNote's suggested author name, and move to the Year field. In the Year field, type:

1999

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: Impacts of meteorites on Earth

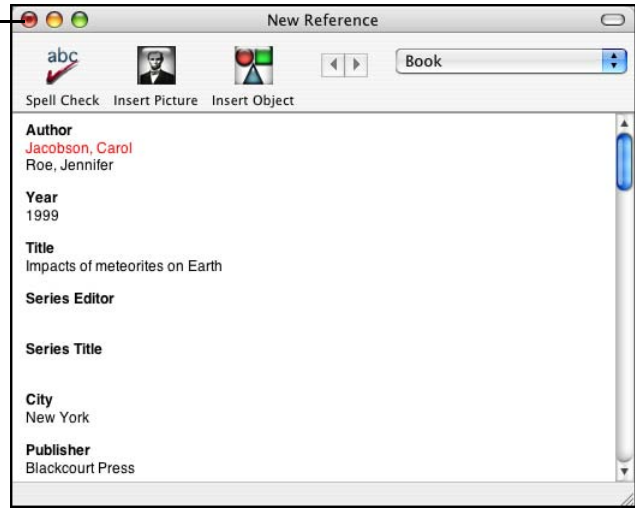
City: New York

Publisher: Blackcourt Press

Number of Pages: 100

Abstract: The impact of a meteorite hitting earth millions of years ago may have led to the extinction of some marine life.

close button



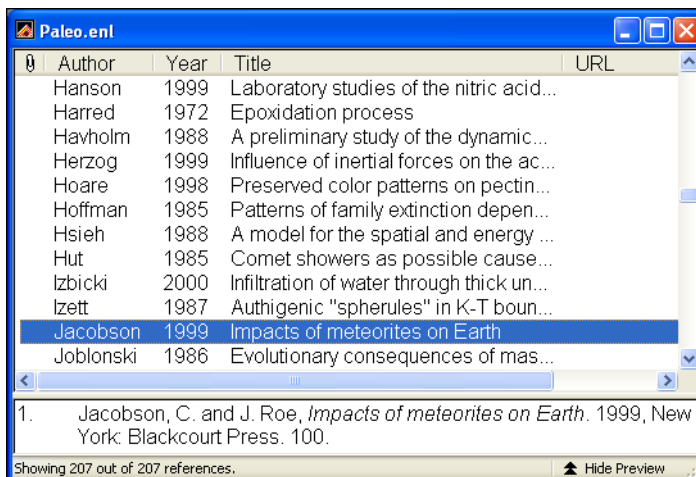
This book does not have a Series Editor or a Series Title, so those fields can be left empty.

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.

It is best to enter English titles in sentence case, where only the first word and proper nouns are capitalized. The selected output style can then either print the text as entered (sentence style) or apply headline case, where all major words are capitalized (excluding articles and prepositions).

7. Close the Reference window by clicking the close button or by choosing *Close Reference* from the *File* menu.

All information is automatically saved when you close a window. Your new reference will appear in the Library window.



Enter References That Contain Images

EndNote helps you organize both reference information and images. Three reference types—Figure, Chart or Table, and Equation—are available specifically for cataloging picture files and object files, although you can add Images and Captions to any reference type.

The difference between a picture file and an object file is how Microsoft Word interprets the file. For example, Word interprets files with these extensions as pictures:

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

In this section, you are going to enter a journal reference that includes a picture file.

To enter a reference that includes an attached picture file:

1. From the *References* menu, choose *New Reference*. An empty Reference window opens with the words "New Reference" displayed at the top. The Reference Type should appear as *Journal Article*.
2. Enter 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.

Author: Tiberius Rex

Year: 1995

Title: The scale and the feather--a suggested evolution

Journal: Paleontology

Volume: 23

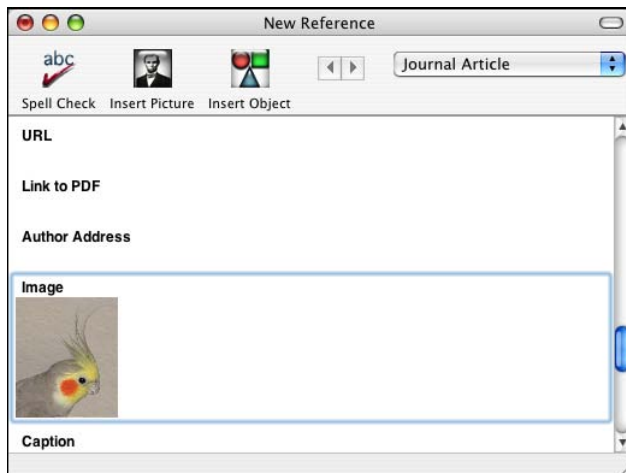
Issue: 9

Pages: 23-45

Keywords: Feathers
Evolution
Birds

Abstract: This article discusses the evolution of bird feathers from reptilian scales.

3. Scroll down to the Image and Caption fields.
4. From the *References* menu, select *Insert Picture* to display a file dialog.
5. On the file dialog:
 - a. Navigate to the folder:
Applications:EndNote 9:Examples (Macintosh), or
Program Files\EndNote 9\Examples (Windows).
 - b. Highlight the file titled **Feather2.BMP**.
 - c. Click *Open* to insert the file into the Image 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.

6. 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.

7. Click the close button to close and save the reference and return to the library window.

Next, enter a reference that includes an attached object file:

1. From the *References* menu, choose *New Reference*. An empty Reference window opens.
2. Click the *Reference Type* list and choose *Chart or Table*.
3. Enter the reference text as shown below.

Created By: Milkirk, Marie

Year: 2002

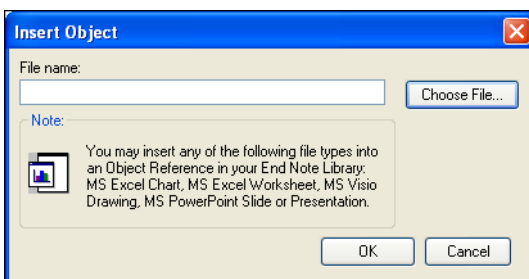
Title: Hominid Timeline

Image Source Program: Microsoft Excel

Date: May 9

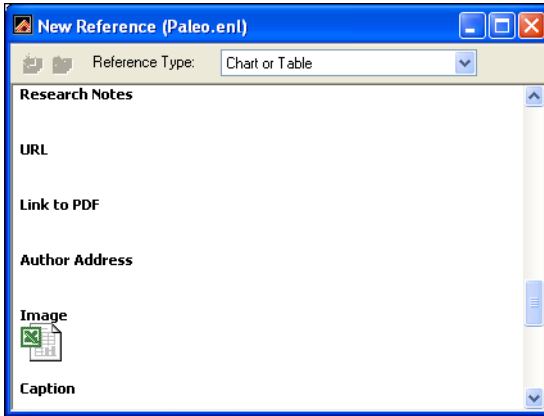
Keywords: Evolution
Hominids
Timelines

4. Scroll down until you can see the Image field, and from the *References* menu, select *Insert Object*.
5. (Windows Only) An Insert Object dialog appears.



Click *Choose File* to display a file dialog.

6. On the file dialog:
 - a. Navigate to the folder:
Applications:EndNote 9:Examples (Macintosh), or
Program Files\EndNote 9\Examples (Windows).
 - b. Highlight the Microsoft Excel file titled Hominid Evolution.xls.
 - c. Click *Open* to insert the file into your new reference.

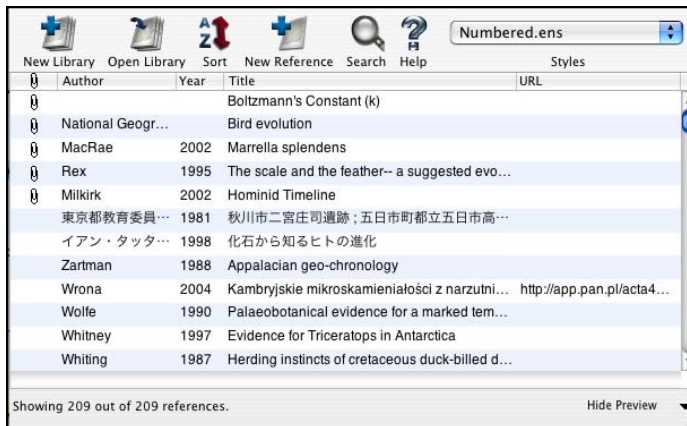


The file appears as an attachment in the Image field. EndNote copied the file to the .DATA folder stored with the Paleo library, and linked the copied file to this reference.

7. In the Caption field, enter:
Hominid Timeline
8. Click the close button to close and save the reference and return to the library window.

To easily locate the references containing images:

Click on the Image column heading (the paper clip) to sort records containing images at the top of the list.



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 remote 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 65.

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:

- ◆ 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 into your library and inserting images.

Chapter 6: Searching Remote Databases

With the EndNote *Connect* and *Search* commands, you can search online bibliographic databases just as easily as you can search an EndNote library on your own computer! And to make it even easier, the results of your searches appear as EndNote references—ready for you to store in your own EndNote library.

This section will guide you through these basic steps:

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

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

About the PubMed Database

For this lesson, you will connect to PubMed, the National Library of Medicine's online public access version of their MEDLINE database. PubMed is the **remote 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 *Connect* command does). However, some setups require that you establish an online connection (sign on) *before* choosing EndNote's *Connect* 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 *Connect* feature.

NOTE: America Online users must have version 3.0 or later in order to use EndNote's online features.

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 33.

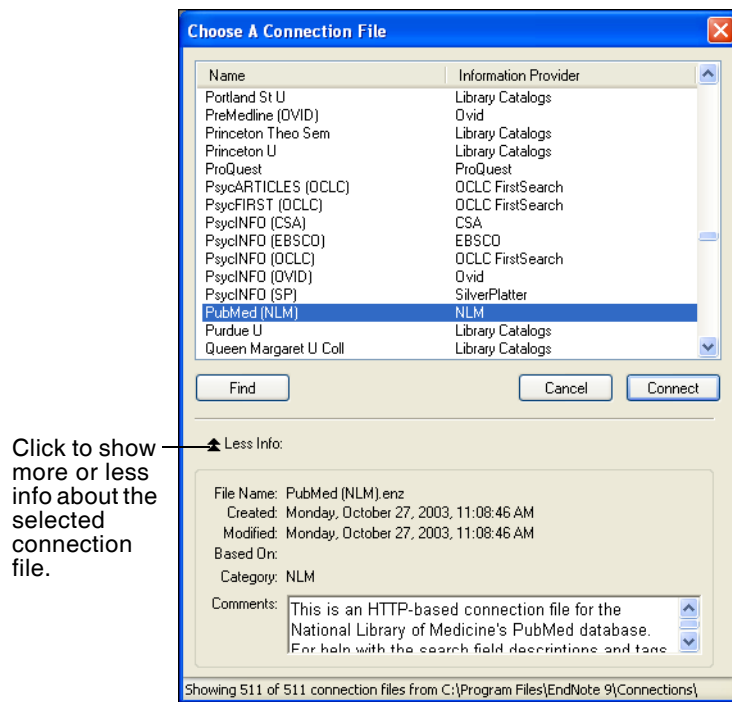
Connect to a Remote Database

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

To connect to the PubMed Database:

1. With EndNote running, go to the *Tools* menu, select the *Connect* submenu, and select *Connect*.

(The *Connect* menu will eventually list the databases to which you have connected in the past, and you can customize this list.)



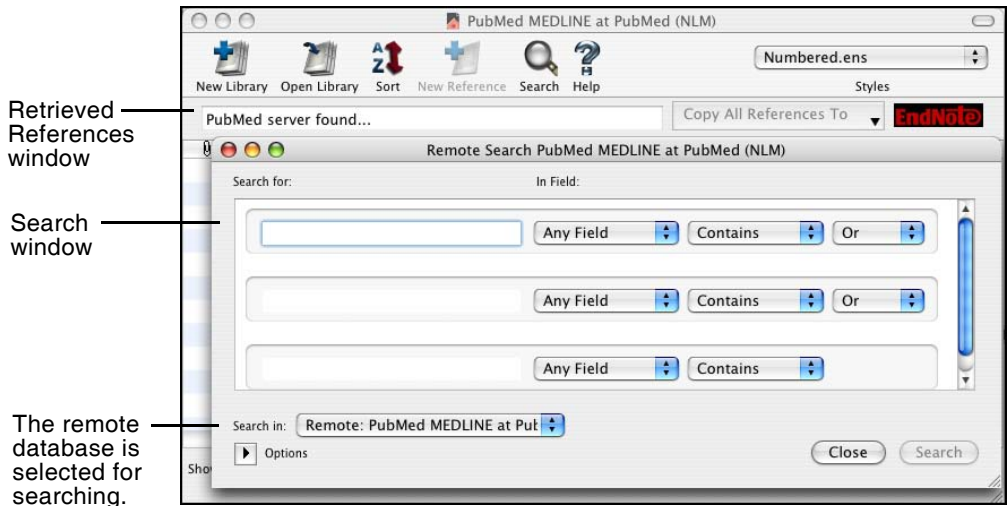
NOTE: This window displays all of the connection files available in your Connections folder. Use the *Find* button to quickly view various categories of databases to help you locate the one that you need.

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

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 successfully established, EndNote alerts you with an error message and closes the connection.

When the connection has been successfully established, EndNote opens a Retrieved References window for the PubMed Database, and displays the Search window on top of it. Note that the search window is titled, "Remote Search PubMed MEDLINE At PubMed (NLM)." The PubMed MEDLINE database is selected and EndNote is ready to search.



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

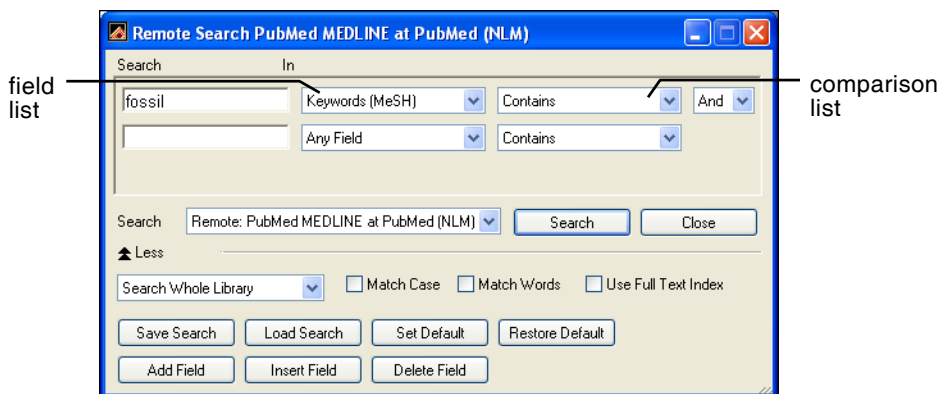
Search the Database

The next step is to enter the search term(s) to find the references you need. Searching a remote 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.

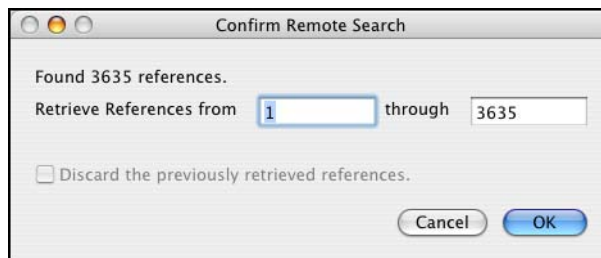
To enter the search term(s) and perform the search:

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



2. Click *Search*.

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



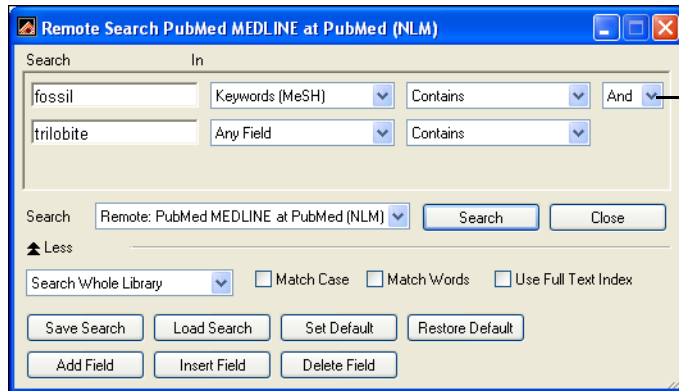
The dialog displays the number of references that were found to match your search request, and gives you the option to retrieve them.

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

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

3. Click *Cancel*, and you are returned to the Search window.
4. Click in the second search line and type “trilobite.”

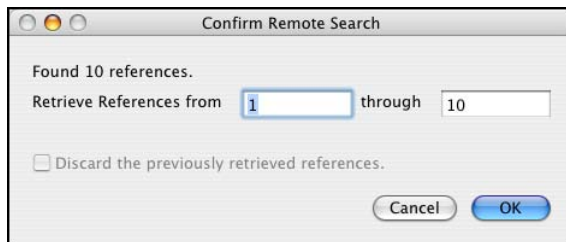
5. Verify that the field list for the second search line is set to *Any Field*.
6. Set the operator between the two search lines to "And."



Choose the "And" operator.

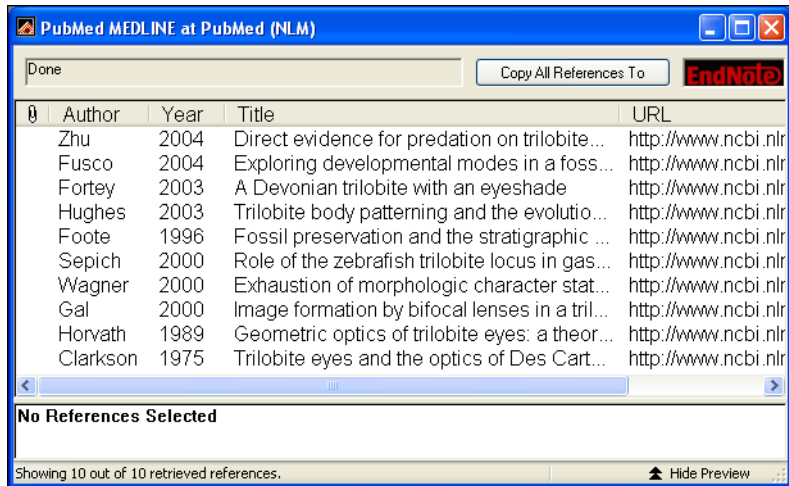
7. Click *Search*.

This time only 10 references were found.



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

The references are downloaded and appear in the 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). The *Pause* button appears in the status line at the bottom of the window during record retrieval.

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

Save the References

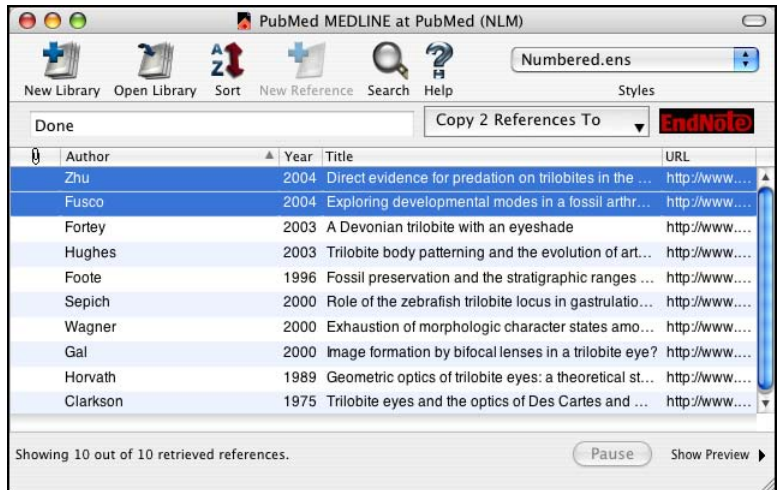
At this point you can peruse the retrieved references to see which ones you would like to keep. Save the references you want by transferring them into one of your own EndNote libraries.

The selected references can be copied to an open library using drag-and-drop or the *Copy* and *Paste* commands. You can also copy references directly to a library that is open, to a library that is closed, or to a new library using the *Copy References To* command, 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 2 References To* button, and do one of these:
 - ◆ If the Paleo library is already open and appears in the list, select it.
 - ◆ Or, select *Choose Library*. In the file dialog that appears, open the Examples folder in the EndNote folder, choose Paleo.enl, and click *Open*.

The references 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 *Discard* (Macintosh) or *OK* (Windows) and close the window.
5. Close the Search window.

This concludes the tutorial for using EndNote's *Connect* 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 6 for details about establishing connections, searching for references, and retrieving references.
- ◆ Read “Selecting a Connection File” in Chapter 6 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

Remote 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 33.

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

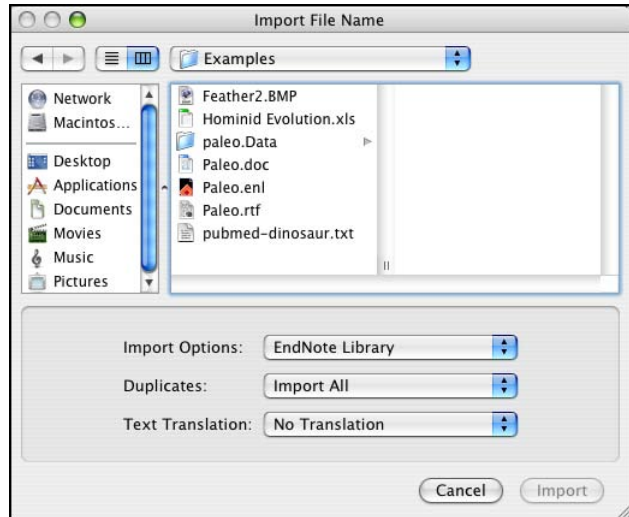
Once you have captured and saved your data file in a tagged format, you need to identify the proper EndNote filter to import the data. There are hundreds of filters included with EndNote; each one is designed to read a specific tagged format from a specific information provider.

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

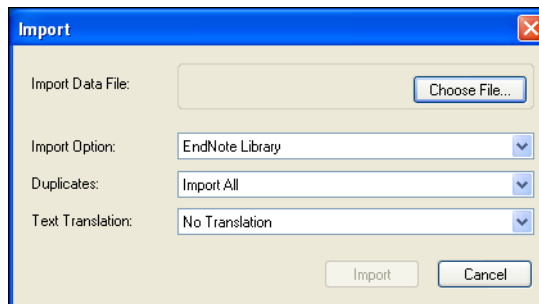
1. Display the Paleo library window in EndNote.

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

the
Macintosh
Import
dialog



the
Windows
Import
dialog



- Select the file to import:

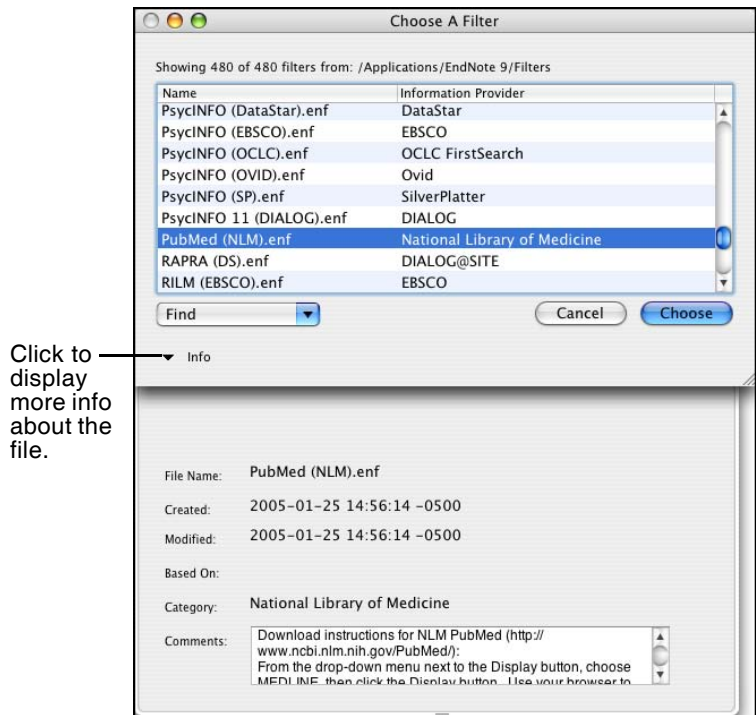
Macintosh: Browse to the EndNote 9:Examples folder and highlight the Pubmed-dinosaur.txt file.

Windows: Click the *Choose File* button to display a file dialog. Browse to the EndNote 9\Examples folder and then highlight and *Open* the Pubmed-dinosaur.txt file.

- 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.

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



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

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.

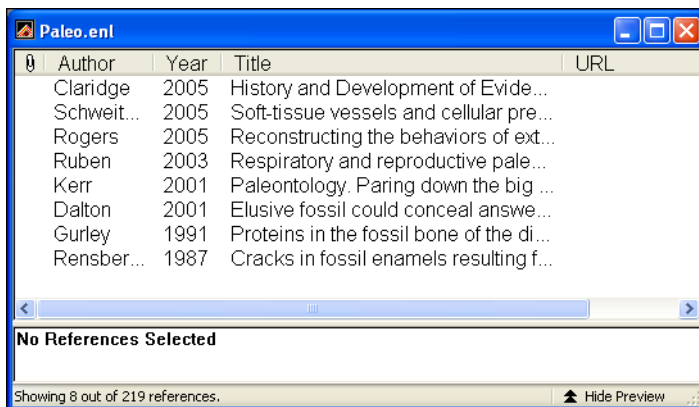
Text Translation: No Translation

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 display in the Library window. This is a good time

to peruse the imported data to make sure it imported as expected.



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

Summary of Output Formats and Corresponding Import Options

A subset of supported information providers are listed 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 www.endnote.com for updated information and import filters.

Copyright Issues and Fair Use of Downloaded Data

EndNote gives you the capability to import references downloaded from online databases into its libraries. Some producers of online reference databases expressly prohibit such use and storage of their data, others charge an extra fee for a license to use the data in this way. Before you download references from a database, be sure to carefully check the copyright and fair use notices for the database. Note that different databases may have varying restrictions, even from the same information provider (such as DIALOG or Ovid).

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
CSA (formerly Cambridge Scientific Abstracts)	<p>From the CSA search results screen, click <i>Save/Print/Email</i>. On the "Save/Print/Email" screen, select:</p> <p>Record Format: Full Record Save File Format: PC or Mac</p> <p>Click <i>Save</i>. Your Web browser asks where to save the file. If your Web browser lets you save in different file formats, make sure you save as a "Text Only" (*.txt) file.</p>	Various filters for CSA databases are provided in EndNote's Filters folder.
CAS SciFinder	Save references in the "Tagged Format" (*.txt).	SciFinder (CAS) filter
Current Contents on Diskette (CCOD) - Mac	Save references in the "EndNote" format.	EndNote Import
Current Contents on Diskette (CCOD) - Windows	Save references in the "EndNote" format.	EndNote Import
DIALOG	<p>Set your communication software's option to capture text. Use Dialog's Format 5 with "tag" appended to the TYPE command -- type "s1/5/1-20 tag".</p> <p>You must download data in Format 5. If Format 5 is not available, try the "full" format, which is sometimes the same as Format 5. For questions concerning Dialog's many formats, please contact Dialog's tech support.</p>	Various DIALOG filters are provided in EndNote's Filters folder.
DIMDI	Use the DLOAD command with report D1 (e.g. DLOAD REPORT=D1).	Various DIMDI filters are provided in EndNote's Filters folder.

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
EBSCOhost	<p>After adding your selected references to your folder, click "View Folder" or "Folder has items" to see its contents.</p> <p>If you choose to email or save the references, uncheck the boxes to include HTML and PDF; also make sure that "Standard Field Format" is checked and set to "Detailed Citation and Abstract."</p> <p>If you choose not to save to disk, you must also check the Bibliographic Manager tab, then choose "Citations in a format that can be uploaded to bibliographic management software" or "Citations in Direct Export format."</p>	Various EBSCO filters are provided in EndNote's Filters folder.
INIST	<ol style="list-style-type: none"> 1. Click the <i>Enregistrer</i> 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 <i>Sauvegarde de notices</i> button. 	Various INIST filters are provided in EndNote's Filters folder.
ISI CD (Citation Indexes)	From the <i>File</i> menu, choose <i>Save Records</i> . In the Save Records dialog, choose the <i>NLM Medline</i> format from the <i>Export Format</i> menu.	Citation Indexes (ISI) filter
Knowledge Finder	Place document in the Save file, and select the document. Choose <i>Export Selected Documents</i> from the <i>File</i> menu.	Various Knowledge Finder filters are provided in EndNote's Filters folder.
Medscape	After selecting the desired records and adding them to your clipboard, click the <i>Save or Email Clipboard</i> 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

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
OCLC FirstSearch	Mark those references to be saved and click <i>Export</i> . At the next page, choose EndNote and then click <i>Export</i> . EndNote will prompt you to select the corresponding filter.	Various OCLC filters are provided in EndNote's Filters folder.
Ovid	After selecting the references you wish to download, click <i>Results Manager</i> . Choose the following options: Fields: Complete Reference Citation Format: Reprint/Medlars (or Direct Export, if available) Click the <i>Save</i> button. Save the file as plain text (*.txt).	The appropriate Ovid filter will be selected automatically when using <i>Direct Export</i> option. If you are using Ovid's multiple database searching, you must select the <i>Direct Export</i> citation format.
Ovid for Windows	Select the <i>Options</i> button from within the "Save Documents" dialog box. From the list of options, choose the Output Format, then click <i>OK</i> . On the next screen, choose <i>Reprint Format</i> .	Various Ovid filters are provided in EndNote's Filters folder.
PsycINFO at www.apa.org	After marking the records you wish to download, choose <i>Full PsycINFO Record</i> then click the <i>Display Marked Records</i> button. Select the text, then copy and paste it into a text editor, saving the file as plain text (*.txt).	Use the PsycINFO (APA) filter.
PubMed	From the drop-down list next to "Display," choose <i>MEDLINE</i> . From the "Send to" list, choose <i>File</i> . Use your browser to save the page as a plain text file (*.txt).	PubMed (NLM) filter
Reference Update	Select <i>Reference Listings</i> from the <i>Output</i> menu, and choose the following options: Device: ASCII File - No Printer codes (be sure to enter the path and file name for the output file.) Output Format: Medline Click <i>Print</i> to create the output file.	Reference Update (ISI) filter

Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
SilverPlatter WebSPIRS	<p>Once you've obtained your search results, click <i>Save</i>. Select the following "Save Records" options:</p> <p>Which fields?: All fields</p> <p>Include: Record number and database name</p> <p>Field labels: Short labels.</p> <p>Click the <i>Save Records</i> button. Use your Web browser to save the page as "Text Only" (do not save in HTML format).</p>	Various SilverPlatter filters are provided in EndNote's 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 EndNote's Filters folder.
UnCover (Ingenta)	Using your email software, save references emailed to you as a "Plain Text" or "Text Only" file.	UnCover (INGENTA)
Web of Science	When viewing your marked references, click <i>Export to Reference Software</i> to have the references exported directly to EndNote. (See "Direct Export from Web Pages" on page 75.) You may also choose <i>Save to File</i> to save the references to a text file and import them into EndNote.	ISI-CE
Wilson	<p>Select the following options</p> <p>Destination: Choose <i>e-mail</i> or <i>save</i>.</p> <p>Include: Record numbers and full-text links (optional).</p> <p>Format: Choose <i>text</i>.</p>	WilsonWeb

Direct Export from Web Pages

Certain web sites contain a download button that will send your search results directly to EndNote, pick the correct import option, and start the import process automatically. All you need to do is choose the EndNote library into which the data should be imported. This “direct export” or “direct download” method does away with the additional steps of saving the references to a text file, and then importing that file with the appropriate filter. The systems listed below provide a direct export of references into EndNote. The list keeps growing, so check our web site at www.endnote.com for updates!

- ◆ Thomson Scientific (ISI)
- ◆ American Psychological Association
- ◆ Bausch & Lomb
- ◆ BioMedCentral
- ◆ BioMedNet
- ◆ BMJ
- ◆ Buffalo University
- ◆ EBSCO
- ◆ EI Engineering
- ◆ Elsevier
- ◆ EMBASE
- ◆ IEEE
- ◆ JAMA
- ◆ JSTOR
- ◆ Karger Publishing
- ◆ Los Alamos National Laboratory
- ◆ MicroPatent
- ◆ National Center for PTSD, PILOTS Database
- ◆ NERAC
- ◆ NISC
- ◆ OCLC
- ◆ OVID
- ◆ Oxford Press Journals
- ◆ Science Magazine
- ◆ Stanford University's Highwire Press
- ◆ Telemed

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.

Chapter 8: Searching an EndNote Library and Printing Directly from EndNote

In this part of the Guided Tour you will learn how to:

- ◆ Search an EndNote library for a subset of references.
- ◆ Print an independent bibliography from EndNote.

In this part of the tour, you will search for a set of related references and print them, as though to share the information with a colleague.

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 33.

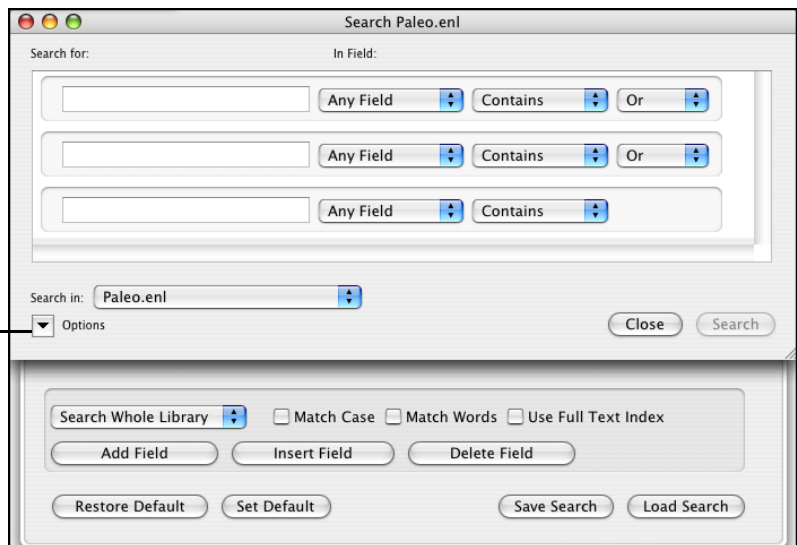
Search for a Set of References

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.

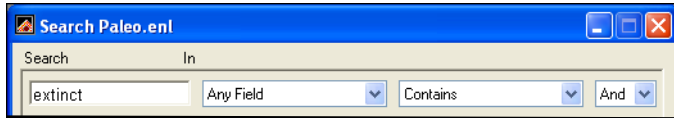
To search for references:

1. From the *References* menu, choose *Search References*.
2. Use the *Options* button (Macintosh) or *More* button (Windows) to display additional search options.

toggles to display *More* options or *Less* options



3. Type “extinct” as the first **search term**.

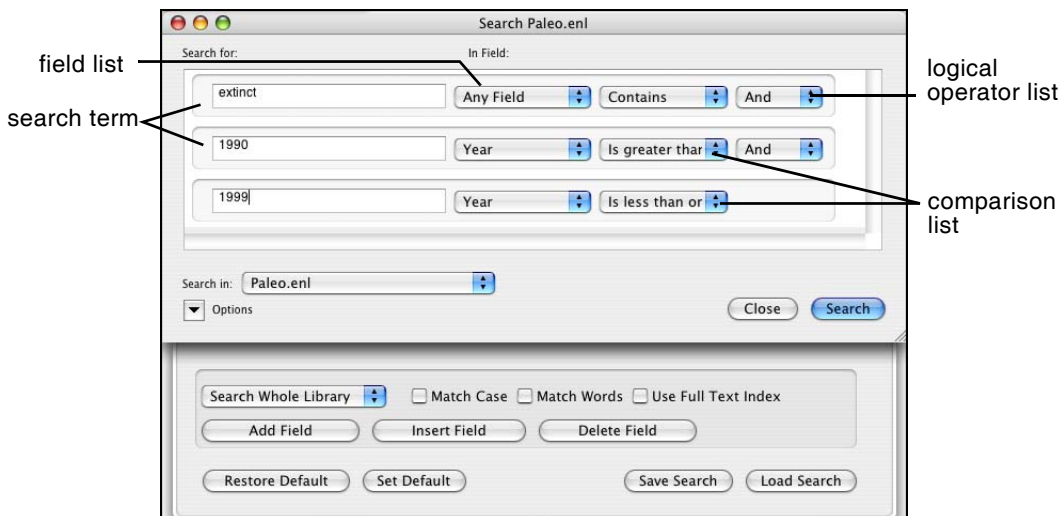


The words *Any Field* next to “extinct” mean that EndNote will find references that have the string “extinct” in any field. The *Contains* comparison operator means that EndNote will search for this string of text anywhere in the field.

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 may want to click and drag the bottom right corner of the window to size it larger.
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.

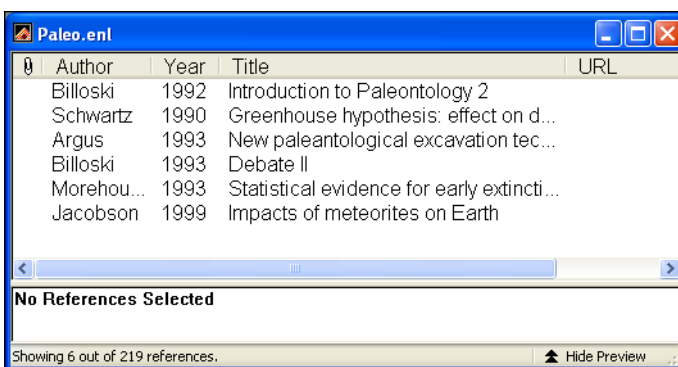
Notice that the following check boxes are not selected for this search:

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.

Use Full Text Index: This option would search for the term with right truncation only, finding “extinction,” but not “nonextinct.” By not selecting this, our search will find the text string “extinct” whether it appears at the beginning, end, or middle of a word.

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



The status area at the bottom of the Library window should now read, “Showing 6 out of 219 references.” You are looking at the same Paleo library as before, but EndNote has restricted the view to display only the results of the search.

You can close the Search window now. You also 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 print them.

Print the Found References

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

While you can print directly to a printer, you may want to save to an RTF file instead. An RTF file can be opened by any word processor, where you can fine tune headers, footers, page numbers, font styles, etc., before printing.

To preview the bibliography:

1. On the Main palette or 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, 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., <i>New paleontological excavation techniques</i> . Journal of Paleontology, 1993. 19 : p. 234-237.	
2. Billoski, T.V., <i>Introduction to Paleontology 2</i> . 6th ed. 1992, New York: Institutional Press. 212.	
3. Billoski, T.V., <i>Debate II</i> . Science, 1993. 77 : p. 5-6.	
4. Jacobson, C. and J. Roe, <i>Impacts of meteorites on Earth</i> . 1999, New York: Blackcourt Press. 100.	
5. Morehouse, S.I. and R.S. Tung, <i>Statistical evidence for early extinction of reptiles due to the K/T event</i> . Journal of Paleontology, 1993. 17 (2): p. 198-209.	
6. Schwartz, M.T. and T.V. Billoski, <i>Greenhouse hypothesis: effect on dinosaur extinction</i> , in <i>Extinction</i> , 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.

To print the bibliography to a word processor file:

1. On the Main palette or toolbar select an output style. For this example, choose the *Author-Date* style.
2. If you want to further limit the references to print, select those references you want to include.

3. From the *File* menu, choose *Export*. A standard “Save As” dialog appears.
4. Select a folder location, and type in a name for your file.
5. Determine which references to include:
Macintosh: If you want to print only the selected references, check the “Export Selected References” box. Clear the box to print all references showing in the library window.
Windows: If any references are selected in the library window, only those references will be included. Otherwise, all showing references are included.
6. Next to the Save As Type label, select *Rich Text Format*.
7. Click *Save* to save your formatted bibliography to the file.
8. You can use any word processor to open the RTF file, such as Microsoft Word or WordPerfect. You can make any changes you like, and then print from the word processor.

To print the bibliography to a printer:

1. On the Main palette or toolbar select an output style. For this example, choose the *Numbered* style again.
2. If you want to further limit the references to preview, select those references you want to include. To select all references in the list, go to the *Edit* menu and choose *Select All*.
3. From the *File* menu, choose *Print*. A standard print dialog appears.
4. Click *Print* or *OK* to begin printing.

Once you are done printing your search results, you may want to return to the full list of references in the Paleo library. To show all references again in the library window, go to the *References* menu and select *Show All References*.

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 can be found in Chapter 8, “Managing References.”
- ◆ Read Chapter 12, “Creating an Independent Bibliography,” about creating reference lists directly from your EndNote library.
- ◆ 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, or 2003 (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 to give you direct access to your references while writing in Microsoft Word. The Cite While You Write commands enable EndNote to do bibliographic formatting to the document that is currently open in Word.

In this part of the Guided Tour, you will learn how to:

- ◆ Insert EndNote bibliographic citations into your paper and create a bibliography.
- ◆ Edit citations to suppress author names and add cited pages.
- ◆ Insert EndNote figure citations into your paper. (This section uses the image references that were inserted while following Chapter 5 of the Guided Tour.)

Open the Paleo Library

If EndNote is not already running, start it and open the Paleo library (Paleo.enl), as shown under "Start EndNote" on page 33.

EndNote will look for matching references in the currently open libraries. While EndNote can automatically 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.

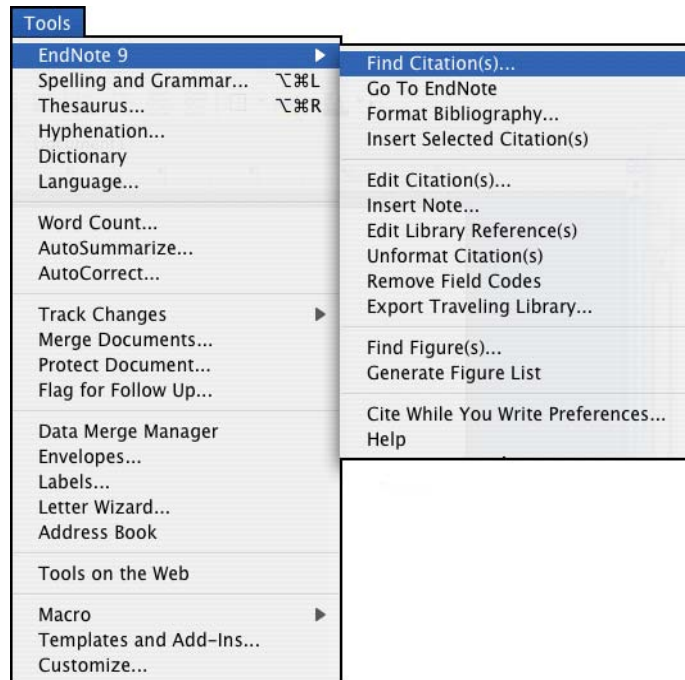
To start writing your paper and inserting citations:

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.

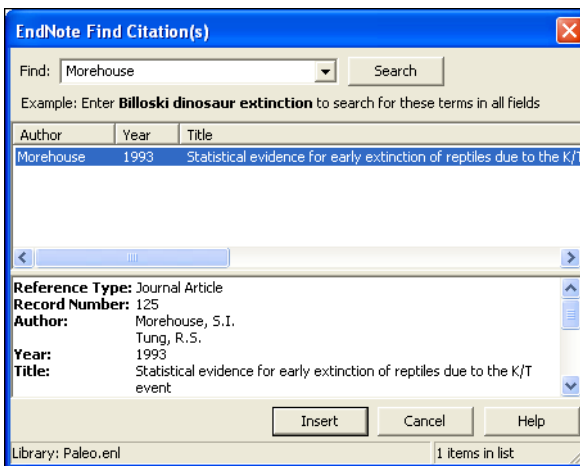
Now you are ready to insert a citation.

2. From the *Tools* menu, go to the *EndNote 9* submenu and then *Find Citation(s)*.



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.

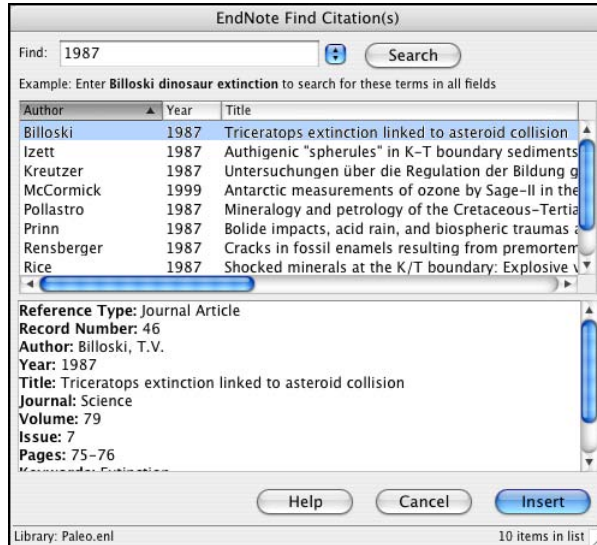
EndNote not only inserts a citation, but Instant Formatting formats the citation in the currently selected *Numbered* style and adds it to a formatted bibliography at the end of the paper.

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 9* submenu and then *Find Citation(s)*.

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



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

EndNote inserts the citation, and Cite While You Write technology formats it and adds it to the bibliography at the end of the paper. Your document text should now look like this:

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

1. Morehouse, S.I. and R.S. Tung, *Statistical evidence for early extinction of reptiles due to the K/T event*. Journal of Paleontology, 1993. **17**(2): p. 198-209.
2. Turnhouse, M.B., *Role of 14C dating in paleontology*. Journal of Paleontology, 1987. **75**(6): p. 11-15.

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

9. Assume that you have finished inserting citations in your paper. From Word's *File* menu, choose *Save* to save your document.

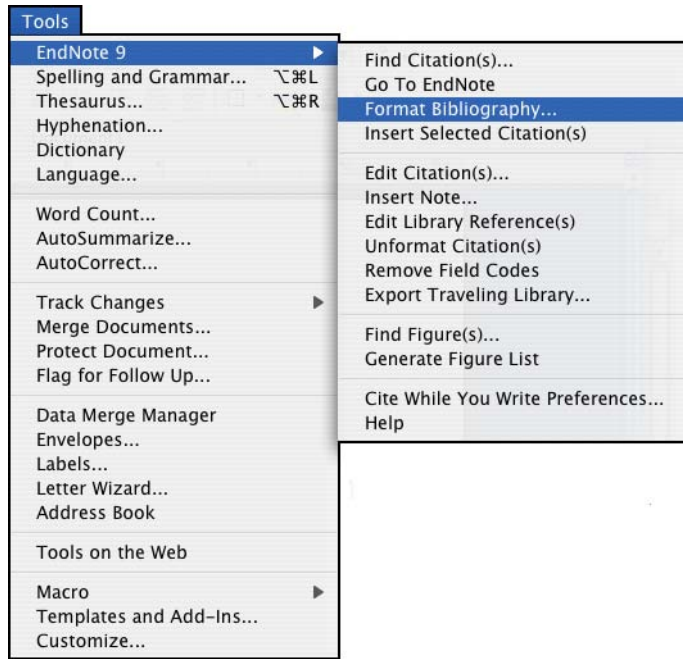
NOTE: You can also insert citations in footnotes. First, use the appropriate Word command to create the footnote. Then, insert the EndNote citation in the footnote. Word controls the placement and numbering of the footnote, and EndNote formats the citation based on the current style.

Select a Bibliographic Style

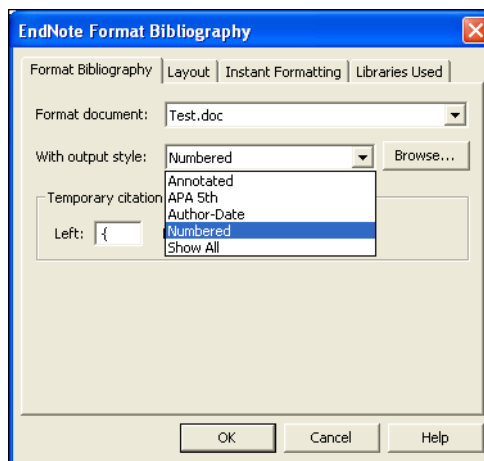
You can format your citations and bibliography as many times as you like, changing the output style and various other layout settings each time.

To select the bibliographic style used for formatting:

1. From Word's *Tools* menu, go to the *EndNote 9* submenu and choose *Format Bibliography*.



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 1,300 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*.

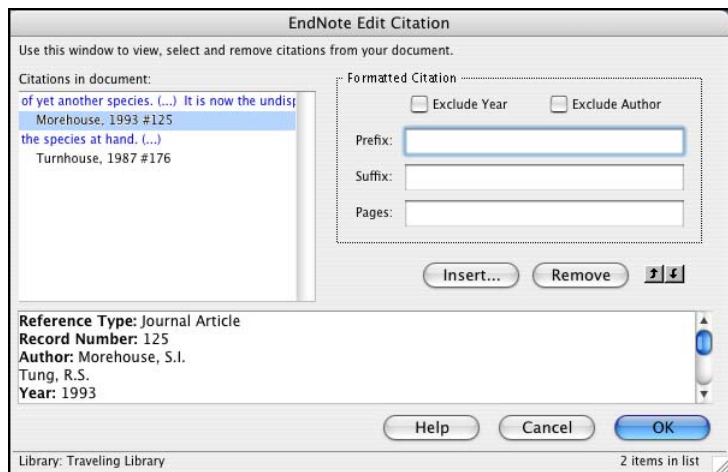
Edit a Citation

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 9* submenu and then *Edit Citation*.



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 references inserted in Chapter 5: “Entering References.”

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:

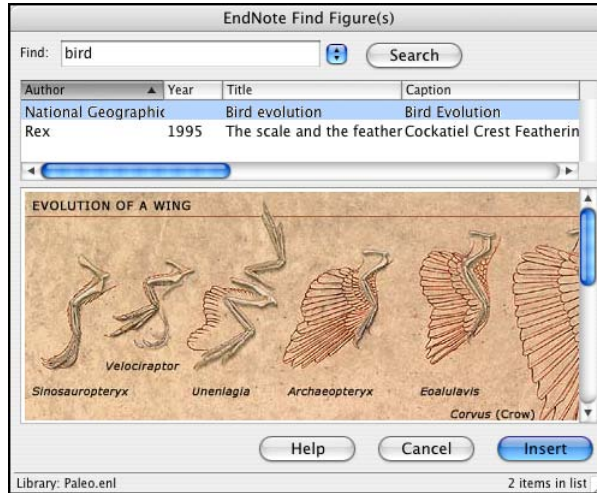
1. First, add more text to your paper:

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 9* submenu and then *Find Figure(s)*. 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)

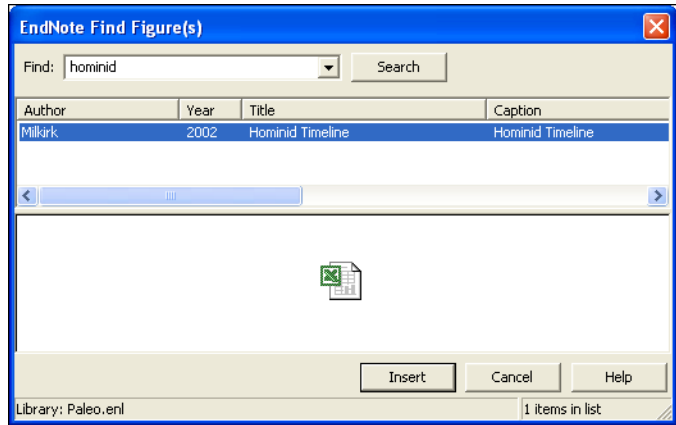
5. Next enter the text:

While exploring the evolution of dinosaurs and birds, it becomes clear that *Homo sapiens* have occupied earth for a relatively short period of time.

Now you are ready to insert a reference to the Microsoft Excel file we inserted into an EndNote reference earlier in this guided tour.

6. From the *Tools* menu, go to the *EndNote 9* submenu and then *Find Figure(s)*. The EndNote Find Figures dialog appears.

7. Type the text “hominid” 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.)

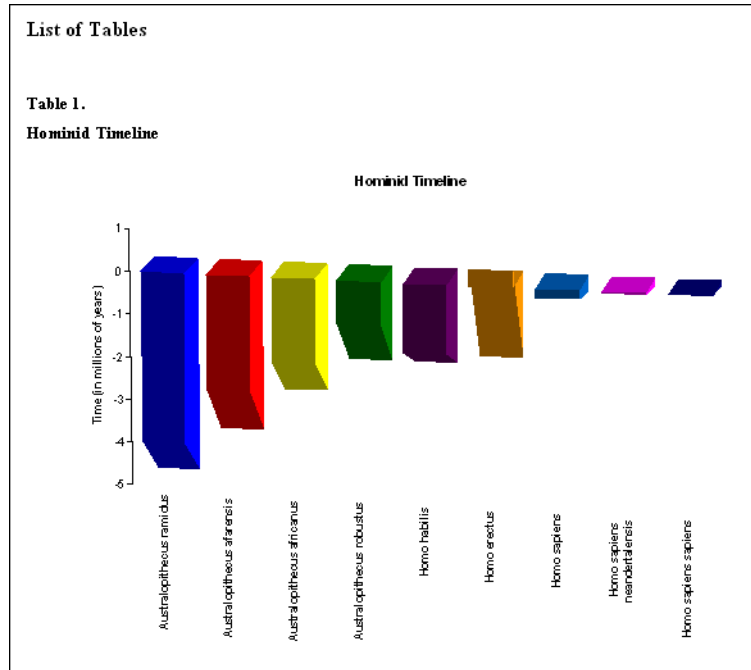
The image was found in the *Chart or Table* reference type, so it was added to Word and numbered as a table.

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

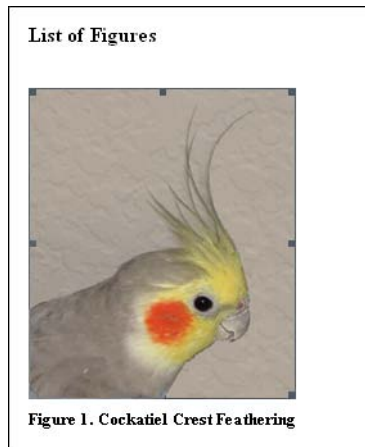
While exploring the evolution of dinosaurs and birds, it becomes clear that *Homo sapiens* have occupied earth for a relatively short period of time. (Table 1)

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 need to resize the Hominid Timeline to fit on the page. Click on the image, and then hold down the Shift key

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



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



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).

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 1,300 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.

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