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2034 AW HAARLEM
THE NETHERLANDS

EndNote X8

User's guide

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1 Introduction

EndNote is a special database application with a collaborative Web tool. The program is compatible with Microsoft Word for Windows and Mac OS X.

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

With **EndNote X8** you can **share** your entire EndNote library, including references, PDFs, and annotations with up to 100 people. Everyone can add to, annotate and use the library – at the same time. The changes are viewed in the *Activity Feed* button.

EndNote Online is a feature set within EndNote desktop, Web of Science Core Collection, and ResearcherID. It provides a range of bibliographic management tools on the Web. You can import and edit references via a personal EndNote online account, and then cite the references in papers and create bibliographies. More info, see chapter *12 EndNote Online*.

The **Network edition** of EndNote is licensed for a particular number of users. You can install EndNote on a shared network for simultaneous use, or you can install it locally for each of the licensed users. In either configuration, users can access a common library on a server or their own personal library. In addition they can edit their own styles, filters, and connection files and configure the EndNote preferences for their own requirements. The EndNote Network edition is an ideal bibliographic package for any lab or department that would like to make the EndNote application and its libraries or references available to multiple users simultaneously.

There are several major components that can be installed with EndNote:

- ◆ **Connection Files:** files for directly retrieving references from online databases
- ◆ **Filters:** files for importing text-files containing reference data
- ◆ **Spelling Dictionaries:** dictionaries available for the spelling checker
- ◆ **Styles:** formats for creating bibliographies and in-text citations
- ◆ **Word Processor files:** files in Word or WordPerfect and EndNote Manuscript Templates for Word
- ◆ **Term Lists:** the term lists maintain a list of the names or words entered into the corresponding fields. They help with data entry by suggesting terms as you type.

Note

Here are some facts you should know about running **EndNote on your network**:

- EndNote does not perform 'record locking' functions that would allow multiple users to edit one library at the same time. Users can share EndNote libraries (databases) simultaneously as long as the libraries are set to *read-only* or *locked status*. Multiple users can access the same EndNote library to perform searches, copy references to their documents, and format bibliographies (editing is only possible with read-write exclusive rights).
- One person should be assigned the responsibility for maintaining and updating the library at a separate location; this user should be granted full access to the file. Then, periodically post the updated library on the network for all other users, with read-only access.
- Users can maintain an individual Preferences file locally on their hard drive.
- EndNote libraries are compatible across Windows and Macintosh network platforms. This means that Macintosh and Windows users can access an EndNote database over a network simultaneously. There is no conversion necessary!
- EndNote can be used in conjunction with license key server software to limit the number of simultaneous users (EndNote Network Concurrent) who can access the software at a given time.
- The environment in which EndNote will be used, must support long file names.

1.1 System requirements for Windows/Mac

EndNote loves both the Windows and Macintosh® platforms. Here's how to check if your current systems and programs are EndNote-ready. Click on the link below to check the EndNote X8 system requirements for your platform

<https://researchsoftware.com/system-requirements?product=160>

1.2 Glossary

1.2.1 Connection File

A connection file contains information necessary to connect to, search, and import references from an online database or online library catalog. Each connection file represents a different online database (such as the Library of Congress or PubMed from the National Library of Medicine).

1.2.2 Field

A field refers to a part of an EndNote reference, such as the author, year, or title. In the EndNote Reference window, each field is displayed as its own section, containing a separate piece of information, such as author names or keywords. Fields are arranged in EndNote styles to show how the data should be formatted. They are arranged in EndNote import filters to show how the tagged data should be imported. EndNote allows for up to 54 fields in each reference.

1.2.3 Library

Library is the term for your EndNote database of references. It is a collection of records of reference material.



1.2.4 Output Style

Styles are the files that EndNote uses to determine how to arrange references for a wide variety of bibliographic formats. EndNote provides more than 5000 preconfigured styles, although a typical installation copies only the 100 most popular styles into the Styles folder of your EndNote folder. Styles are used to determine the format of references in the preview pane of the Library window as well as when you use the Print, Export, Format, Format Bibliography, and Copy Formatted commands.

1.2.5 Pubmed

PubMed is a free search engine accessing primarily the MEDLINE database of references and abstracts on life sciences and biomedical topics. The United States National Library of Medicine (NLM) at the National Institutes of Health maintains the database as part of the Entrez system of information retrieval (*Source: Wikipedia*).

1.2.6 Record Number

EndNote assigns a unique record number to each reference as it is added to your library. These record numbers appear in the temporary citations to ensure that the correct reference is used when the paper is formatted:

{Volckaert, 2017 #31}

The record number for a reference is also visible in the title bar of the Reference window. You cannot modify or reassign record numbers. If you delete a reference, that number is never used again in that library.

1.2.7 Reference

A library contains a collection of records, called references. There is no limit to the number of references you can create in an EndNote library. It is recommended that the number not exceed 50,000 to maintain efficient performance managing the database.

1.2.8 Reference Type

An EndNote library can contain references from a variety of different sources, such as books, journal articles, and newspaper articles. We call these different sources reference types. EndNote provides built-in forms for these and other common reference types.

1.2.9 Web of Science

Web of Science (WoS) is een verzameling citatie-indices die tegen betaling wordt aangeboden door het bedrijf Thomson Reuters. De citatie-indices beslaan gezamenlijk meer dan 11.000 wetenschappelijke tijdschriften. In totaal zijn de gegevens van meer dan 46 miljoen artikelen vastgelegd. Toegang tot deze databases kan worden verkregen met *ISI Web of Knowledge* (WoK). Dit is een betaalde dienst waar universiteiten over het algemeen een abonnement op hebben, zodat de informatie vanaf computers binnen de universiteit geraadpleegd kan worden (*Bron: Wikipedia*).

1.2.10 Z39.50

Z39.50 is a NISO protocol that describes the search and retrieval of information from remote databases. It is primarily used for data retrieval from bibliographic databases.



1.3 Starting EndNote

1.3.1 From Microsoft Word

1. Start Microsoft Word.
2. Click the *EndNote* tab.
3. Click the  button.

1.3.2 From the Start menu

1. Click the Start button.
2. Choose *All Programs > EndNote > EndNote*.
The first time you start EndNote, the *Getting Started with EndNote* dialog appears. You can choose between three topics:
 - *Learn about EndNote*
 - *Create a new library*
 - *Open an existing library*
3. Choose *Open an existing library*.
4. In the file dialog, locate and open the *Sample_Library.enl*.
By default this will be on C:\Program Files\EndNote X8\Examples.
5. Click *Open*.

Note

- ♦ Choose *Help > About EndNote X8* to display your registration number and the EndNote edition you work with.
- ♦ EndNote allows you to specify the libraries that you want to open automatically when EndNote starts up. Choose *Edit > Preferences > Libraries*. Use the *Add Open Libraries* button to assign the default library. See also *8.8 Libraries*.

1.4 Screen structure

1.4.1 Library window

When you first open a library in EndNote, you see a **Library window** made up of different panels:

- ♦ Groups panel (left)
- ♦ Search panel (above)
- ♦ Reference list panel (middle)
- ♦ Tabs panel (right)

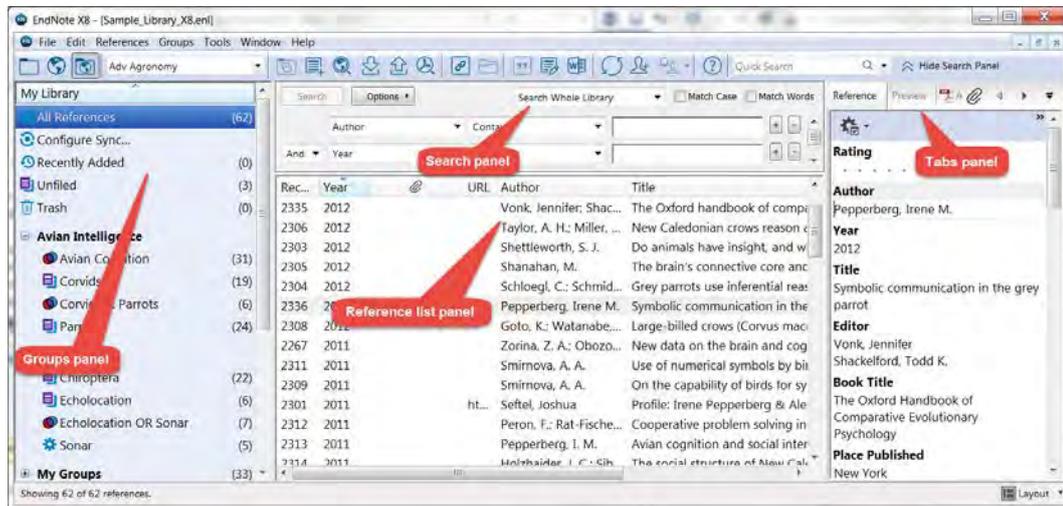
You can change the layout of the Library window by clicking the *Layout* button in the lower right-hand corner of the Library window to display a menu. There are seven different layouts from which to choose.



Layout button



You can click on a panel to make it active or press F6 to jump from one panel to another.



1.4.1.1 Groups panel

Groups are subsets of references saved for easy retrieval. The left panel of the Library window lists several group sets that include various types of groups. Each is described in chapter 5.8 *Groups*. The selection of groups and menu commands depends on the display mode that you select in the small Display toolbar.

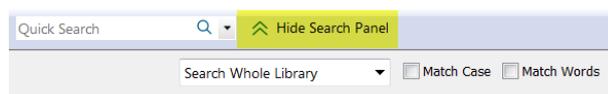


- **Local Library Mode:** Displays automatic groups, custom groups, and smart groups, but not Online Groups. This mode keeps you from inadvertently downloading references found during an online search into your currently open library. This is the default mode.
- **Online Search Mode:** Search and download references from online databases. In this mode, only Online Search groups are available. References are downloaded into a temporary library. They are removed when you close EndNote. For more information, see 4.2 *Importing with 'Online Search'*.
- **Integrated Library & Online Search Mode:** All groups and commands are available. When you download references from an online database EndNote saves them to a group under the Online Search group set and to your open library.

If you decide that you do not want to keep the retrieved references, select them, and then move them to the *Trash* folder.

1.4.1.2 Search panel

The Search panel displays at the top of the EndNote window. The **Hide Search Panel** toggle button



in the top right-hand corner of the window allows you to show or hide the Search panel. More information, see 5.5 *Search*.



1.4.1.3 Reference list panel

The reference list displays all the references in the currently selected group. Options are available from the toolbar.

- ◆ **Sort Order**

You can change the sort order by clicking the column headings or by selecting *Tools > Sort Library*. When you sort a library, that sort order is retained even after you close and reopen a library. More information, see *8.12 Sorting*.
- ◆ **Adjust column widths**
 - Put the mouse arrow between two column headers.
 - Drag the column divider to adjust column widths.
- ◆ **Display fields**

By default, the first column in the Library window displays a *Read/Unread* indicator followed by:

 - ◆ File Attachments (paperclip).
 - ◆ Author
 - ◆ Year
 - ◆ Title
 - ◆ Rating
 - ◆ Journal / Secondary Title
 - ◆ Last Updated
 - ◆ Reference Type
 - ◆ URL

You can change the order of the fields by dragging the column headings to the desired position. In addition, you can add, remove or change the name of a field in the menu *Edit > Preferences > Display Fields*. If you would like to display all author names under the Author heading in the library reference list, rather than just the first author, select the check box next to the *Display all authors in the Authors field*. See *8.2 Display Fields*.
- ◆ **Navigate in the Reference List**

There are a number of ways to browse through your references. More information, see *5.2.1 Navigating in the Library window*.
- ◆ **Display Font**

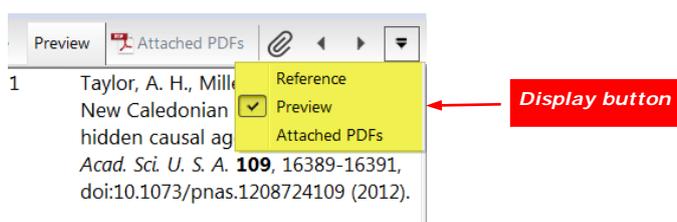
To change the display of the **font** you choose *Edit > Preferences > Display Fonts*. See *8.3 Display Fonts*.

1.4.1.4 Tabs panel

You can navigate between the tabs *Reference*, *Preview*, and *PDF Viewer* as follows:

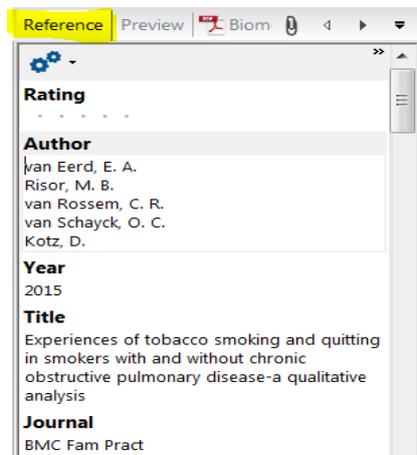
- ◆ **Use the display button**

Click the display button in the upper right-hand corner of the Library and select the display you want.

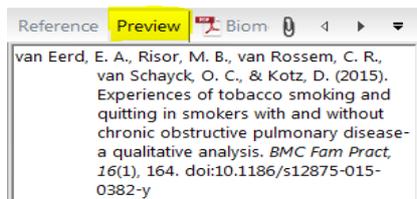


- ◆ **Use tabs**

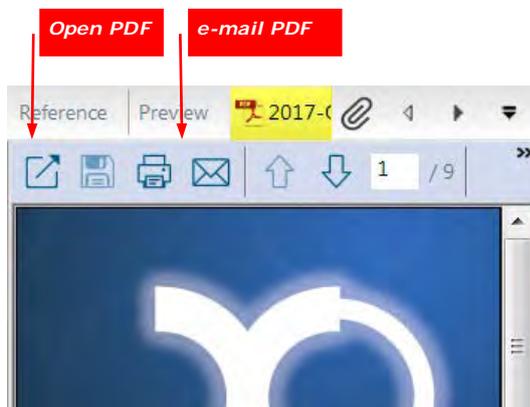
- ◆ Select the *Reference* tab to edit the contents of the highlighted reference.



- ◆ Select the *Preview* tab to display the selected reference in the current style.

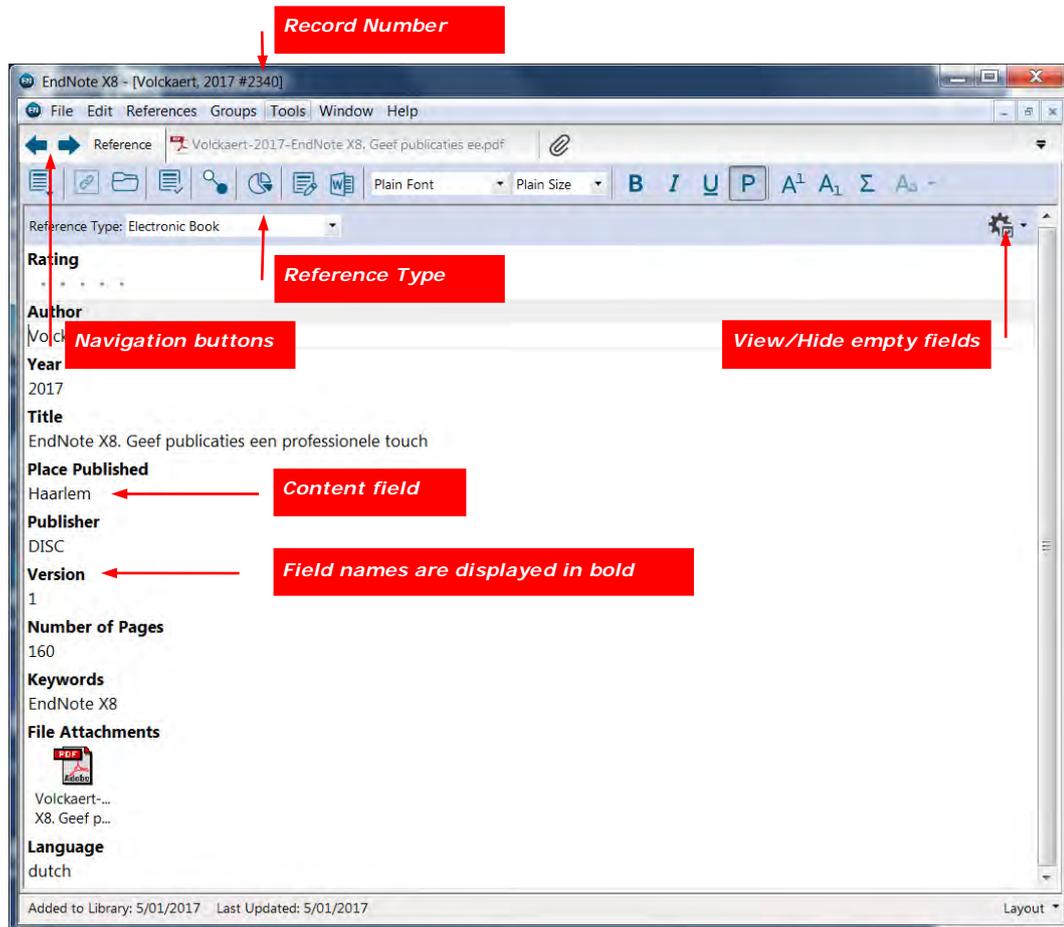


- ◆ Select the *Attached PDF's* tab to view and annotate attached PDF files within the PDF Viewer panel.



1.4.2 Reference window

Double click on a reference to open the *Reference Window*. In this window references can be edited. The Reference window displays the content of a reference. Each part of the reference is stored in its own field. The type of reference is displayed below the title bar. *Author*, *year* and *record number* are displayed in the titlebar of an opened reference; that is the citation information. For example [Volckaert, 2017 #3].



In the Reference window pane you can do the following:

- ♦ Edit references.
- ♦ Navigate by using two navigation buttons in the upper left corner. More information, see chapter 5.2.2 Navigating in the Reference window.
- ♦ Display the content of a PDF file.
- ♦ Use the *Attach File* button (paperclip).
- ♦ Click the button  in the right upper corner,
 - ♦ to toggle between *Show > Hide Empty fields*
 - ♦ to *Show Rating Field*.



1.5 Toolbars

Toolbars give you quick access to some of the commonly used commands. In EndNote there are 3 toolbars: *Library*, *Reference* and *CWYW* (Word).

1.5.1 Library



- *Local Library mode*: Displays automatic groups, custom groups, and smart groups, but not Online Groups. This mode keeps you from inadvertently downloading references found during an online search into your currently open library. This is the default mode;
- *Online Search mode*: Search and download references from online databases. In this mode, only Online Search groups are available. References are downloaded into a temporary library. They are removed when you close EndNote;
- *Integrated library & Online Search Mode*: All groups and commands are available. When you download references from an online database, EndNote saves them to a group under the Online Search group set and to your open library;
- *Bibliographic Output Style*: Displays a drop-down list of output styles;
- *Copy to local library*: This command is available only in Online Search Mode. It copies highlighted references to the active local library. References will appear in a temporary Copied References group;
- *New Reference*: Opens a new reference for data entry;
- *Online Search*: Allows you to select a connection file for an online search;
- *Import*: Allows you to import references from various bibliographic systems and in various file types into the currently open EndNote library;
- *Export*: Allows you to export the currently open library;
- *Find Full Text*: Searches online for the full-text article for the selected references. EndNote downloads the file of the article and displays a paper clip in the Paper Clip column;
- *Open Link*: For references that contain a URL, this option launches your default browser and displays the URL location;
- *Open File*: Opens the file linked to the EndNote reference;
- *Insert Citation, Format Bibliography, Go to Word Processor*: These commands are available only when Microsoft Word or OpenOffice.org Writer is running. A complete CWYW toolbar is available within each word processor;
- *Sync Library*: Synchronizes the references in your EndNote desktop library with the references in your EndNote online library.
- *Share Library*: share your library with up to 99 colleagues.
- *Activity Feed*: views the activity of the changes your collaborators are making.
- *Help*: Displays the online 'Help' dialog.
- *Quick Search*: Quickly search your library by typing a word or phrase.
- *Hide Search Panel*: Display or hide the Search Panel.

1.5.2 Reference

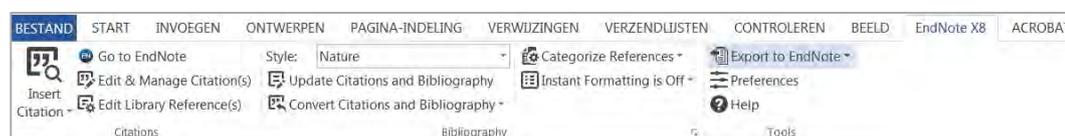


- *Go to previous reference*: Click the left arrow to close the current reference and open the previous reference (based on the sort order in the library window);



- ♦ *Go to next reference*: Click the right arrow to close the current reference and open the next reference(based on the sort order in the library window);
- ♦ *Reference Type*: Displays a drop-down list of Reference types;
- ♦ *Display PDF*: View and annotate attached PDF files
- ♦ *Attach File*
- ♦ *Find Reference Updates*
- ♦ *Open Link*: Opens the URL connected to the EndNote reference;
- ♦ *Open File*: Opens the file connected to the EndNote reference;
- ♦ *Spell Check*: Displays the 'Spell Check' dialog;
- ♦ *Mark as Read/Unread*
- ♦ *Attach Figure*: Inserts a shortcut to an image/graphic in a reference. This file is displayed as an attachment in the field 'Image';
- ♦ *Format Bibliography*: Chooses the formatting of citations and bibliography;
- ♦ *Go to Word Processor*: Activates Word from within EndNote;
- ♦ *Font*: Displays a drop-down list with fonts;
- ♦ *Size*: Displays a drop-down list with font sizes;
- ♦ *Bold*: Applies the bold format style to text;
- ♦ *Italics*: Applies the italic format style to text;
- ♦ *Underline*: Applies the underline format style to text;
- ♦ *Plain*: Font size;
- ♦ *Superscript*: Applies the superscript format style to text;
- ♦ *Subscript*: Applies the subscript format style to text;
- ♦ *Symbol Font*: Displays the 'Insert symbol' dialog.
- ♦ *Change Case*

1.5.3 Cite While You Write



- ♦ *Insert Citation*: Allows you to enter identifying text to locate, match, and cite one or more references in your database;
- ♦ *Insert Selected Citation(s)*: Inserts a citation for each reference that is currently marked in EndNote;
- ♦ *Insert Note*: Inserts a new note citation;
- ♦ *Insert Figure*: Inserts an image/graphic from the *Image* field in EndNote;
- ♦ *Go to EndNote*: Activates EndNote from within Word;
- ♦ *Edit & Manage Citation(s)*: Edits the settings for the selected citation(s);
- ♦ *Edit Library Reference(s)*: Opens the EndNote reference associated with each selected citation;
- ♦ *Update Citations and Bibliography*: Chooses the formatting of citations and bibliography;
- ♦ *Convert Citations and Bibliography*
 - ♦ *Convert to Unformatted Citations*: converts formatted citations into temporary or unformatted citations';
 - ♦ *Convert to Plain Text*: removes all extra EndNote specific information from the document;
 - ♦ *Convert Reference Manager Citations to EndNote*
 - ♦ *Convert Word Citations to EndNote*: Convert any Word citations in this document to EndNote Cite While You Write citations;
- ♦ *Categorize References*



- ◆ *Group References by Custom Categories*
- ◆ *Configure Categories*
- ◆ *Instant Formatting is Off*
 - ◆ *Turn Instant Formatting on*
 - ◆ *Configure Instant Formatting*
- ◆ *Export to EndNote*
 - ◆ *Export Traveling Library*: Create an EndNote library containing the references cited in the document;
 - ◆ *Export Word Citations*: Create an EndNote library containing the Word citations in the document;
 - ◆ *Export Word Master List*: Create an EndNote library containing the Word master list of citations;
- ◆ *Preferences*: allows you to edit the Cite While You Write preferences;
- ◆ *Help*: Displays online help for Cite While You Write.

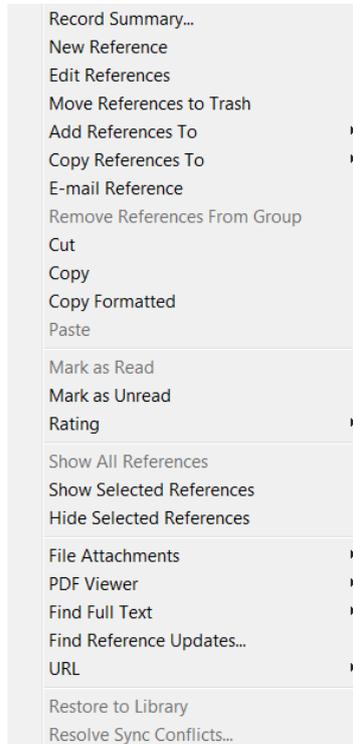


1.6 Context sensitive menus

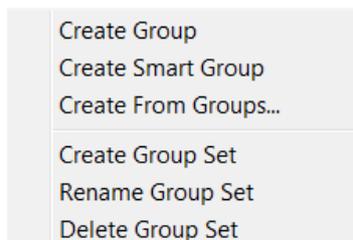
Where to click

Context-sensitive menu

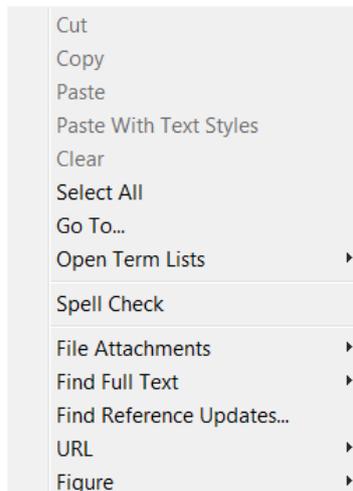
Library Window



Groups Pane



Edit Window



1.7 Keyboard commands

Command	Action
Ctrl + O	Open Library
Ctrl + W	Close (active) Library
Ctrl + S	Save
Ctrl + P	Print
Ctrl + Q	Exit
Ctrl + Z	Undo (only one action, the last one)
Ctrl + X	Cut
Ctrl + C	Copy
Ctrl + V	Paste
Ctrl + A	Select All / Unselect All
Ctrl + K	Copy Formatted
Ctrl + R	Change Text
Ctrl + N	New Reference
Ctrl + E	Edit Reference
Ctrl + D	Move references to Trash
Ctrl + M	Show All References
Ctrl + Y	Spell Check
Ctrl + 1	Open Term List in an opened reference

Navigation command	Action
Ctrl + Page Down	Next Reference (in the Edit window)
Ctrl + Page Up	Previous Reference (in the Edit window)
Home	Go to first reference (In Reference List)
End	Go to last reference (In Reference List)
Ctrl + F	Search References (In Reference List)
Ctrl + J	Go To ... (in Edit window)

Format command	Action
Ctrl + T	Plain Size is selected when text is highlighted
Ctrl + L	Plain font is selected when text is highlighted
Ctrl + B	Bold
Ctrl + I	Italic
Ctrl + U	Underline
Ctrl + Shift +	Superscript
Ctrl + =	Subscript
Ctrl + 2; Ctrl + 5	Line spacing double; Line spacing 1.5



CWYW command	Action
Alt + 0	Insert Note
Alt + 1	Return to Word / Go to EndNote
Alt + 2	Insert Selected Citation(s)
Alt + 3	Format Bibliography
Alt + 4	Unformat Citations
Alt + 5	Edit Library References
Alt + 6	Edit Citation(s)
Alt + 7	Find Citation(s)
Alt + 8	Export Traveling Library
Alt + 9	Cite While You Write Preferences



2 Creating, Opening, Closing a library

A library contains records/references and each reference contains up to 54 fields.

2.1 Creating

To create a library:

1. Choose *File > New*.
The *New Reference Library* dialog appears.
2. Type the name of the new library in the *File name* field.
Select the location in the *Look in* field.
3. Click the *Save* button.
Now we can add references to the EndNote library. See chapter 4 *Building a library*.

Note

- ♦ The name of the database should not be longer than 255 characters. The use of spaces is allowed. However, if the server on which the database is stored does not allow the use of long file names, a maximum of 8 characters may be used plus an extension of three characters in accordance with the DOS standard (8.3 format).
- ♦ You can work with several libraries at the same time. However, we recommend that you **work with one big library**, rather than different little libraries.
- ♦ A database can contain a lot of references, there is no size limit.

2.2 Closing

To close an EndNote Library choose one of these options below:

- ♦ Click the close button  in the upper right corner of the Reference window.
- ♦ Choose *File > Close Library* from the menu;
- ♦ Use the keyboard command <Ctrl+W>;
- ♦ Right-click in the taskbar and choose Close window in the context sensitive menu.

2.3 Opening

2.3.1 Opening EndNote library

2.3.1.1 Using the Start menu

1. Click the *Start* button.
2. Choose *EndNote X8*.
Windows keeps track of the last 15 files that were opened.
3. Select the library you want to open.

2.3.1.2 Using the Menubar / Keyboard shortcut

1. Choose *File > Open Library* or Press <Ctrl+O>.
2. In the dialog that appears:
 - Locate the appropriate database folder.
 - Select the name of the library.
3. Click *Open*.

Note

- ♦ If you can't open a library because it is damaged, try *Tools > Recover Library* to repair the database. See chapter 3.3 *Recover*.
- ♦ EndNote keeps track of the last 12 files that were opened. If you want to open a recently used file, choose the name of the file from the menu *File > Open Recent*.
- ♦ In EndNote, you can work with several libraries at the same time. In the menu Window the opened libraries will be listed.
- ♦ If you want to specify which libraries should open by default when EndNote starts, choose *Edit > Preferences > Libraries*. Click the *Add Open Libraries* button to add all open libraries to the list.

2.3.2 Opening and converting old EndNote libraries

EndNote X8 can easily open and use libraries created with EndNote versions 8 through X7. No conversion is necessary. EndNote X8 is fully compatible with these earlier versions. You can regularly share your libraries between these versions. The conversion makes a *copy* of the original library in the new format, and leaves the original library intact.

2.3.3 Opening EndNote libraries made in a higher version

EndNote X, X1, X2, X3, X4, X5 and X6 are fully compatible which means that you can regularly share your libraries between these versions.

EndNote X8 libraries are not backwards compatible with versions prior to EndNote X6.



3 Backing up, Deleting, Recovering, Compressing a library

3.1 Backing Up

There are many ways that a file can be damaged: CDs and hard disks can fail, viruses can erase or corrupt files and, of course, there is always human error and the possibility of accidentally throwing away your thesis or grant proposal the day before it is due. If you have any kind of disaster, big or little, backup copies can save you hours or days of work.

Your EndNote library becomes increasingly valuable to you as you add references to it. Consequently, it is imperative that you back up your libraries, along with any other important files. Here is a list of important files to back up:

- ♦ EndNote libraries and the corresponding DATA folder, which is part of the library and contains groups, graphics, images, tables etc
- ♦ Custom Reference Types
- ♦ Modified Styles, Filters and Connection Files
- ♦ Word processing documents

Keep your backups stored separately from the default location of your database.

3.1.1 EndNote libraries

1. Choose *File > Save a Copy*.
2. The dialog *Save A Copy* is displayed.
3. Select the location (different from source).
In the *File name* box a name is already entered (original name followed by **Copy.enl**), but you can enter a new name.
4. Click the *Save* button.

If you want to copy all of the required library files and folders, and save disk space, you can create a compressed **filename.enlx** file. See *3.4 Compressing*.

3.1.2 Custom Reference Types

To back up custom reference types:

1. Choose *Edit > Preferences*.
2. Choose the *Reference Types* option in the list of preferences.
3. Click the *Export* button to display a file dialog.
4. Name the file and select the folder where you want the file to be saved.
Click the *Save* button.

To restore the custom reference types:

1. Choose *Edit > Preferences*.
2. Choose the *Reference Types* option in the list of preferences.
3. Click the *Import* button to display a file dialog.
4. Locate, highlight and open the **.xml** file that was previously exported.

3.1.3 *Output Styles, Filters and Connection Files*

Modified styles are imported to backup so that you do not have to recreate the bibliographic format if something happens to your customized style. Similarly, custom filters and connection files should be backed up so that you do not have to redo the work to get your references to import as you want them.

The default *Styles*, *Connections* and *Filter* folders are installed in the EndNote program folder:

C:\Program Files\EndNote X8

If you have not modified these files, it is not important to make backups of them because you can always reinstall them with the EndNote installer.

Once you make a change to one of these files, or create a new file, it is saved to your personal *Styles*, *Filters*, or *Connections* folder. In Windows 7 these folders are found in

C:\Users\Username\My Documents\EndNote\Styles

3.1.4 *Word processing documents*

The papers you have written that include EndNote citations should be kept with your EndNote backup files.

3.2 **Deleting**

EndNote does not provide a function for deleting an unwanted library. You must exit EndNote and delete the library file and its associated .DATA folder by using the <delete> button.

1. Make sure the database you are deleting is closed.
2. Open the folder where the library is located and
 - highlight the **libraryname.enl** file
 - highlight the **libraryname.DATA** folder.
3. Click the *Delete* button.
4. Click *Yes* to confirm.

You can also delete a library from within EndNote:

1. Make sure the database you are deleting is closed.
2. Choose *File > Open Library*.
3. In the dialog:
 - highlight the **libraryname.enl** file
 - highlight the **libraryname.DATA** folder.
4. Right click your mouse and click *Delete*.
5. Click *Cancel* to close the file dialog.

Note

- ♦ If you try to delete an opened library, an error message will be displayed. Click *OK* and close the library.
- ♦ Do not delete an EndNote library connected to a generated bibliography in a Word document.



3.3 Recovering

Occasionally computer files get damaged. If an EndNote library gets damaged, you may get an error message when trying to open it or work with the references. The best way to protect yourself from damaged files is to make regular backup copies of your important documents. If you do not have a backup copy of a damaged EndNote library, you can use the *Recover Library* command to repair the damaged file.

To save your damaged EndNote library:

1. Close the library if it is currently open.
2. Choose *Tools > Recover Library*.
3. Click *OK* to confirm the warn message.
4. The *Select Library to Recover* dialog is displayed
 - Locate and select the library that needs to be repaired.
 - Click *Open*.
5. The dialog *Save Recovered Library* as appears.
 - In the *File name* box the name of the recovered library appears with the suffix – **Saved.enl**
 - Click the *Save* button.
6. A message displays how many references have been recovered.
 - Click *OK*.

Note

- ♦ Back up your library before you recover it.
- ♦ Make a backup of the recovered library.
- ♦ An opened library can not be recovered.
- ♦ The bigger the library, the longer it takes to recover.
- ♦ Term lists are not recovered with the library. Consequently, you will need to rebuild each term list by choosing *Tools > Define Term Lists* from the menu, highlighting the list, and then clicking *Update List* to fill the term list with the terms used in your library. See chapter 6.5 *Term List*.
- ♦ The *Recover Library* tool can also be used to open libraries, that were created in a higher version, in a lower EndNote version.

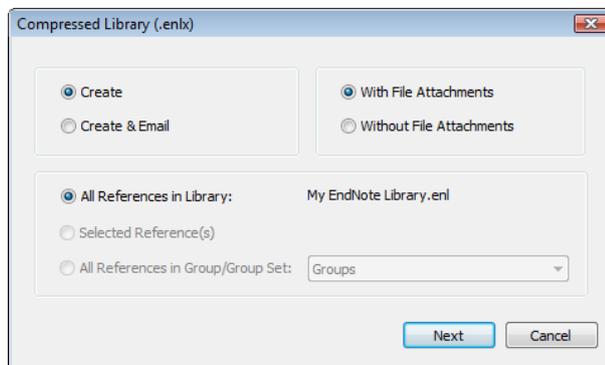


3.4 Compressing

A library contains two files: a **.enl** file and a **.DATA** folder. You can save your complete library (the filename **.enl** file as well as its associated **.DATA** folder and all of its contents: figures, groups, terms etc.) to a single compressed filename **.enlx** file in order to easily back up your library or send a copy to a colleague. Later, you can easily restore (unzip) the compressed library with EndNote. To compress the library proceed as follows:

3.4.1 Compressing a library

1. Open the library in EndNote.
2. Choose *File > Compressed Library(.enlx)*.
3. In the dialog *Compressed Library (.enlx)* you can choose from different options. Click the *Next* button.



4. In the dialog *Save Compressed Library* you choose the location and you enter the new filename (extension **.enlx**).
5. Click the *Save* button.

3.4.2 Restoring a compressed library

1. Open the compressed **.enlx** file in EndNote.
2. The **.enl** file and the **.DATA** folder will be extracted to the same folder where the **.enlx** file is located.

Note

- ♦ EndNote libraries larger than 4 gigabytes cannot be compressed with EndNote's *Compressed Library* commands.
- ♦ Following characters are replaced with an underscore:
 - \ (back slash)
 - / (forward slash)
 - : (colon)
 - * (asterisk)
 - ? (question mark)
 - " (quotation mark)
 - < (less than)
 - > (greater than)
 - | (vertical bar)



4 Building a library

There are several ways to get data into your library:

- ♦ **Entered manually**
See 4.1 *Adding references manually*.
- ♦ **imported**
 - ♦ Online Search, see 4.2 *Importing with 'Online Search' command*
 - ♦ Direct import, see 4.3 *Importing from online databases*
 - ♦ Import textfiles, see 4.4 *Importing text files*
 - ♦ Import PDF files, see 4.5 *Importing PDF files or folders*
- ♦ **copied** from other libraries.
See 6.4 *Merging libraries*.

4.1 Adding references manually

4.1.1 *Which fields must be filled in to obtain a reference conform a bibliographic format?*

Bibliographic information is entered into separate fields in each EndNote reference. By storing the pieces of bibliographic data in different fields, EndNote can later rearrange the elements conform to various bibliographic formats. If you want to cite conform those formats, you have to enter a minimum number of fields. Below a list of different reference types:

- ♦ *Journal Article*: Author, Year, Title, Journal, Volume, Issue, Pages.
- ♦ *Book*: Author, Year, Title, City, Publisher.
- ♦ *Book Section*: Author, Year, Title, Edition, Book Title, City, Publisher, Volume, Pages, Series Editor, Series Title, Edition.
- ♦ *Edited Book*: Editor, Year, Title, Series Edition, Series Title, City, Publisher, Volume, Number of Volumes, Edition.
- ♦ *Magazine Article*: Author, Year, Title, Magazine, Volume, Issue Number, Pages, Date.
- ♦ *Newspaper Article*: Reporter, Year, Title, Newspaper, City, Pages, Issue Date.
- ♦ *Conference Proceedings*: Author, Year of Conference, Title, Editor, Conference Name, Conference Location, Publisher, Volume, Number of Volumes, Pages, Series Editor, Series Title, Edition Date.
- ♦ *Electronic Source*: Author, Year, Title, Access Year, Access Date, Edition, Last Update Date, Type of Medium, Label, URL.

4.1.2 *Useful tricks when entering references manually*

When entering data manually, following tricks can be useful:

- ♦ Enter information **accurately**.
- ♦ Be **consistent** with your entries and assigning keywords.
- ♦ Special bibliographic formatting and punctuation should not be included when you enter reference data into EndNote. For example, you do not need to put quotes around titles, italicize journal names, or include the abbreviation 'Vol.' along with volume numbers. Enter only the **raw data**, and leave the formatting to EndNote.

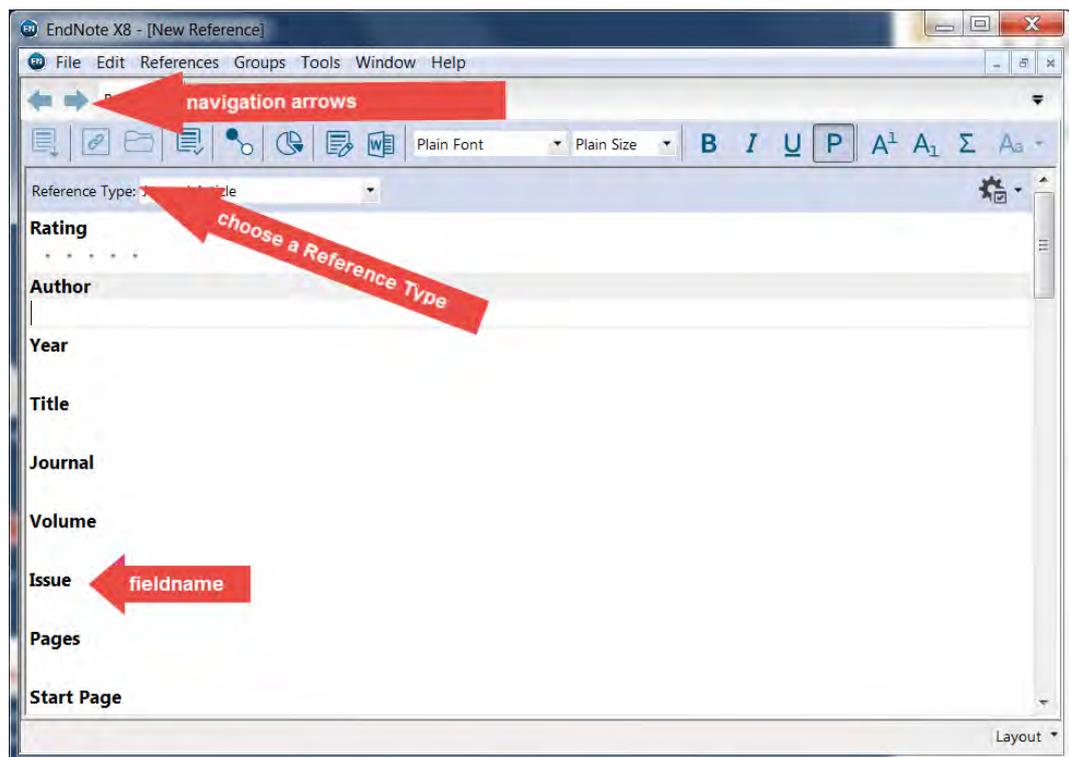
EndNote adds the necessary punctuation and text style changes to the references when it creates a bibliography.

- Mind the **field separator** (<Enter> by default) by entering data in fields such as *Keywords, Authors* etc.
- Use the **arrow keys** to navigate in a field.
- Use <tab> to move to next field.
Use <Shift+Tab> to move to previous field.
- If you enter a lot of references manually, you may find it helpful to create new **term lists** for fields like publisher and city names. (See chapter 6.5 Term List).

4.1.3 Procedure

In the exercise below we add a new journal article reference to the *Sample_Library.enl*. The Sample library is located in the *Program Files\EndNote X8\Examples* folder.

1. Click the  *New Reference* button in the *Main* toolbar or
Click *References > New Reference* in the menubar or
Press the keyboard command <Ctrl+N>.
2. An empty *New Reference* window appears.



3. In the *Reference Type* field the default type is automatically selected.
Choose – if necessary - another reference type from the Reference Type list (ordered alphabetically) at the top of the window.
4. Enter bibliographic data into each of the fields in the reference. Press <tab> to navigate to the next field.
For guidance and details about entering data, see instructions in the table below.
The data you have to enter are displayed in the column *Exercise*.
5. When you are finished, close the *Reference* to save and add it to the library.



Fields	Information	Exercise
Rating	<ul style="list-style-type: none"> Click in the <i>Rating</i> field to apply a rating to each of your references. If the field is not displayed, click the  button in the upper right corner and choose <i>Show Rating Field</i>. 	
Author, Secondary Author, Tertiary Author, Subsidiary Author <i>(Term List)</i>	<ul style="list-style-type: none"> Following notations are possible <ol style="list-style-type: none"> Last name, First name Second name Because of the comma, EndNote will make the difference between First name and Last name. Enter whole names whenever possible. If you are entering Initials be sure to type a period or a space between initials First name Second name Last name (no comma's) Example <i>Volckaert, Mariël or Volckaert, M.G. or Mariël Volckaert</i> <i>De Gelder, Mieke or De Gelder, M. or Mieke De Gelder</i> <i>Auwera, Van der Jozef</i> (In the Netherlands multiple-word last names are entered in a different way) Enter names correctly and preferably in the same format. EndNote can abbreviate first and middle names, so for maximum flexibility enter whole names whenever possible. Always enter author and editor names one name per line. <Enter> is the separator between multiple authors. If there are multiple authors, respect the same order as displayed on the publication. New author names appear in red text to indicate that it is a new name in the <i>Author term list</i> for this library. When closing the reference window the new name will be added to the <i>Author Term List</i> and the red text will change to black. By default each library has three Term Lists: <i>Authors, Journals</i> and <i>Keywords</i>. When entering author 	Ruben, Jan Antoon Jones, Tony Geist, Norbert Roger





Fields	Information	Exercise
	<p>names, the 'Auto Suggest' feature suggest names from the term list (<i>Edit > Preferences > Term Lists</i>).</p> <ul style="list-style-type: none">• Corporate names are followed by a comma. Example <i>United States of America,</i> <i>DISC B.V.,</i>	
Year	<ul style="list-style-type: none">• Enter the four numbers of the year of publication. When appropriate, you may enter 'in press' or 'in preparation' or some other notation.	2016
Title	<ul style="list-style-type: none">• Enter titles without a period or any other punctuation at the end.• Do not press the Enter key while typing titles; allow long titles to just wrap to the next line.• Although the EndNote styles can change the capitalization of titles, it is best to capitalize the title in the same way you would like it to be capitalized in your bibliographies	Respiratory and reproductive sample physiology of dinosaurs and early birds
Journal <i>(Term List)</i>	<ul style="list-style-type: none">• The <i>Journal</i> field is automatically set up to work with the Journals term list. This means that the Journals list is updated as you add new journal names to your references. EndNote will use the term list to facilitate data entry by suggesting journal names as you enter them into the Journal field.• Enter the full name of the journal or Press <Enter> when EndNote suggests the name of the journal you want to enter.• New journal names appear in red text to indicate that it is a new name in the Journal term list for this library.• When the different forms of the journal name are entered (long form, abbreviated form) into the Journals term list, all it takes to change the format of your journal names in a bibliography is one change in the style used. One can add Journal names in the Term List using the menu <i>Tools > Open Term Lists > Journals Term List</i>.• EndNote includes predefined term lists for medical, chemistry, and humanities journals.	Physiological and Biochemical Zoology

Fields	Information	Exercise
Publisher	<ul style="list-style-type: none"> Enter the name of the publisher. 	
Volume	<ul style="list-style-type: none"> Enter the volume number (no extra punctuation such as parentheses around volume). 	76
Issue	<ul style="list-style-type: none"> Enter the issue number (no brackets). 	2
Pages	<ul style="list-style-type: none"> Page ranges can be entered as complete, example 241-249 (no extra punctuation). Page ranges can be entered abbreviated, example 241-9. The style can change the numbers to be either full or abbreviated. 	141-164
Date and Auto Date Stamp	<ul style="list-style-type: none"> Enter dates as you would like them to appear in your formatted list or bibliography. EndNote does not reformat dates. Enter the numerical version of the date. Later on, you can sort your references by these dates, or search for a range of dates (for example 2016/02/21) Two Auto Date Stamp fields appear in the footer of each EndNote reference. The <i>Added to Library</i> and <i>Last Updated dates</i> are inserted when you save a new reference, and then the <i>Last Updated date</i> is reset each time you save changes to a reference. 	
ISBN/ISSN	<ul style="list-style-type: none"> Enter the number as mentioned on the publication (book or journal). This field is also used for <i>Report Number</i> and <i>Patent Number</i>. 	
DOI (Digital Object Identification)	<ul style="list-style-type: none"> This field is used for locating a digital version of a document, PDF or image. It is most useful if you are importing reference data directly from an online source. 	
Reprint Edition	<ul style="list-style-type: none"> Use this field for references that were originally published under a different title. Enter the original title and year to indicate that this reference is a reprint of an earlier publication. 	





Fields	Information	Exercise
	<ul style="list-style-type: none">• Enter this information exactly as you would want it to appear in your formatted reference (including text styles and punctuation)• This field is not intended to be used to indicate whether or not you have a reprint of the article on file. You may use one of the custom fields for this purpose.	
Custom 1-8	<ul style="list-style-type: none">• This field can contain any information.• The fieldname can be changed in the menu: <i>Edit > Preferences > Reference Types > Modify Reference Types.</i>	
Call Number	<ul style="list-style-type: none">• This field is used to store library call numbers. These are the codes that help you to locate publications on the shelves in your library.	
Label	<ul style="list-style-type: none">• This field can be used for many purposes, such as special in-text citations or reprint numbers.• EndNote record numbers are not permanent. They change and should not be used as permanent identifiers. If you want to have a permanent identifier for tracking articles within your EndNote libraries, use the <i>Label</i> field.	
Keywords <i>(Term List)</i>	<ul style="list-style-type: none">• The <i>Keywords</i> field maintains a list of terms.• Use the field to store keywords that you want to associate with the reference.• Enter specific keywords or Press <Enter> when EndNote suggests a keyword you want to enter.• Semicolons (;), backslashes (\) and returns are recognized as delimiters that separate your keywords.• New keywords appear in red text to indicate that it is a new name in the Keyword term list for this library.	theropod dinosaur temperature regulation pelvic aspiration
Abstract	<ul style="list-style-type: none">• Use this field for a brief description of the contents of the work.	In terms of their diversity and longevity, dinosaurs and birds were among the most

Fields	Information	Exercise
		successful of terrestrial vertebrates. (...)
Notes Research Notes	<ul style="list-style-type: none"> ♦ The field <i>Notes</i> and <i>Research Notes</i> can be used to store personal reminders, such as the location of a quotation in a book or the quotation itself. ♦ This field is not intended to be used to enter whole chapters of books (there is a limit!!). 	
URL (Uniform Resource Locator)	<ul style="list-style-type: none"> ♦ This field can be used to link a specific page of information on the web to a reference in your EndNote library. ♦ You could also link to a local file such as a Word document, PowerPoint presentation, Excel worksheet etc. Notice that space in local folder and file names are replaced with '%20'. ♦ To create a link to your reference right-click and choose <i>Link to</i>. ♦ Click the <i>Open Link</i> button to launch the appropriate program or Web browser. ♦ If you need to enter multiple links into the URL field, enter them one per line using the keyboard command <Enter>. ♦ EndNote automatically recognizes URLs if they are entered with the correct prefix (such as http:// or ftp:// in ANY field. When recognized they appear as blue and underlined text and become clickable Web links. 	
File Attachments	<ul style="list-style-type: none"> ♦ Use this field to store the path to files (max. 45 shortcuts) ♦ When you link a file to a reference, you can create an absolute or a relative path. <ol style="list-style-type: none"> 1. Choose <i>References > File Attachments > Attach File</i> or Right-click and choose <i>File Attachments > Attach File</i> from the contextual menu. 2. In the dialog <i>Select a file to link to the reference</i> the checkbox <i>Copy this file to the default file attachment folder and create a relative link</i> is selected by default. This means that the original file is copied in the DATA\ folder that is part of your 	





Fields	Information	Exercise
	<p>EndNote library. If the checkbox is deselected, the link becomes absolute. This means, that EndNote will look in the original folder for the inserted file.</p> <ul style="list-style-type: none">Click the <i>Open File</i> button to launch the appropriate program.	
Author Address	<ul style="list-style-type: none">Enter the address of the author or publisher.	
Figure	<ul style="list-style-type: none">Use the <i>Attach Figure</i> button to insert a graphic or object in this field.The Figure field can contain one single graphic or file attachment. If you attach a second graphic, the first one will be replaced.The image is copied to the .DATA folder which is part of the library. This copy is linked to the reference.Cite While You Write allows you to insert the image and its caption into a word document.Use the <i>Chart or Table</i> reference type if you want to include an image and later insert that image as a table in Microsoft Word.	
Caption	<ul style="list-style-type: none">Use this field for a short description of the image or file.If you generate a list of figures in Word, the caption will appear above or below the picture (depending of the Output Style).	Lung structure and ventilation in Therapod dinosaurs and early birds
Access Date Last Modified Date	<ul style="list-style-type: none">Use these fields for your own record-keeping purposes.Enter the numerical version of the date (YYY, MM, DD). Later on, you can sort your references by these dates, or search for a range of dates.	

Result

Auteur

Ruben, Jan Antoon
Jones, Tony
Geist, Norbert Roger

Jaar

2006

Titel

Respiratory and reproductive paleophysiology of dinosaurs and early birds

Journal

Physiological and Biochemical Zoology

Volume

76

Issue

2

Pages

141-164

Keywords

theropod dinosaur
temperature regulation
pelvic aspiration

Abstract

In terms of their diversity and longevity, dinosaurs and birds were/are surely among the most successful of terrestrial vertebrates. Unfortunately, interpreting many aspects of the biology of dinosaurs and the earliest of the birds presents formidable challenges because they are known only from fossils. Nevertheless, a variety of attributes of these taxa can be inferred by identification of shared anatomical structures whose presence is causally linked to specialized functions in living reptiles, birds, and mammals. Studies such as these demonstrate that although dinosaurs and early birds were likely to have been homeothermic, the absence of habits equivalent to those of some large, modern tropical latitude lizards (e.g., *Varanus*), they may well have maintained significant home ranges and actively pursued and killed large prey. Additionally, this scenario of active, although ectothermic, theropod dinosaurs seems reinforced by the likely utilization of crocodylian-like, diaphragm breathing in this group. Finally, persistent *in vivo* burial of their nests and apparent lack of egg turning suggests that clutch incubation by dinosaurs was more reptile- than birdlike. Contrary to previous suggestions, there is little if any reliable evidence that some dinosaur young may have been helpless and nestbound (altricial) at hatching.

URL

<http://www.journals.uchicago.edu/cgi-bin/resolve?id=doi:10.1086/375425>

Link to PDF**Author Address**

Ruben JA, Oregon State Univ, Dept Zool, Corvallis, OR 97331 USA

Image**Caption**

Lung Structure and Ventilation in Theropod Dinosaurs and Early Birds

Access Date

2006/07/17



4.1.4 About Record Numbers

Any time you add references to a library, the newly added references are assigned new record numbers in the order that they are added to the library. This record number is unique and cannot be changed by the user. These record numbers appear in temporary citations to ensure that the correct reference is used when the paper is formatted. The record number for a reference is also visible in the title bar of the Reference window, e.g. [Volckaert, 2017 #13]. Keep the following points about record numbers in mind:

- EndNote **automatically** assigns a record number sequentially to each reference as it is added to a library.
- If the same reference appears in two different libraries, the record numbers will most likely be **different**.
- Record numbers are **never reused or reassigned** within a library. When you delete a reference, the corresponding record number is never used again in that library.
- You **cannot modify or reassign** record numbers.
- We recommend that you **not** rely on EndNote's record numbers as a means of filing or numbering your office reprints, because **you have no control over this number**. Instead, enter your own unique number into the *Label* field, or any *Custom* field, and use that number for your reprints.

4.1.5 About Auto Date Stamp

When you save a new reference, the *Added to Library* and *Last Updated* dates are inserted in the footer of each EndNote reference. The *Last Updated* date is reset each time you save changes to a reference. The date format of the *Auto Date Stamp* fields is defined in your default operation system settings (*Control Panel > Regional Settings* in Windows).

You cannot edit, print, or export either of the *Auto Date Stamp* fields. You can, however, display and sort these fields just as you can with any other EndNote field.

4.1.6 About Special characters

EndNote references can include special characters, including characters with diacritics and Greek, mathematical, and typographical symbols. Diacritical characters are a part of standard Windows fonts, while most symbols can be entered in the Symbol font.

EndNote uses Unicode to encode special characters, so that data can be easily translated between platforms, programs, and languages. EndNote uses the default language setting set by your operating system. Special characters can be entered into EndNote using any of these text-entry methods:

- Type the character on the keyboard (if the character is part of the language supported by the keyboard).
- Copy the character from another program, and paste it into your EndNote library.
- Use the *Character Map* program supplied with Windows for this purpose.
Start > All programs > Accessories > System Tools > Character Map.
- If you frequently use certain diacritical characters, or words that include diacritical characters, you can store them in a *term list* and then select them from the list when entering references.



Note

- ♦ Choose *References > Find Duplicates* to locate your duplicate references. See also chapter 5.5.4 *Finding duplicate*.
- ♦ If you have inserted a figure or a graph in your reference, do not forget to enter data in the *Caption* field.
- ♦ The *Figure* field can contain only one single graph/object.
- ♦ When EndNote creates a bibliography, text in *Plain Font* and *Plain Size* uses the font and size of your paper. If any fonts, sizes or styles other than the default are entered in your library, the text will appear that way in your bibliography regardless of the font of your paper.
- ♦ To begin using EndNote's spell checker, you must have an open record as the active window. To start spell checking choose *Tools > Spell Check*.
- ♦ In the reference window you can click the  button in the upper right corner to toggle between *Hide Empty Fields* and *Show Empty Fields*. Initially, EndNote displays all fields in a reference. Click *Hide Empty Fields* to view only those fields that contain data.

4.2 Importing with 'Online Search'

If you have access to a library catalog or bibliographic database that supports the Z39.50 protocol, you can use the EndNote **Online Search** command and import references directly from that database into EndNote. This is by far the easiest way to get data into EndNote because it involves no intermediate steps.

EndNote stores the information necessary to connect and search these online databases in individual *connection files*. EndNote comes with pre-configured connection files to free reference databases and library catalogs as well as databases that require payment and/or authentication for access. Most of the databases offered by the commercial information providers (Ovid, OCLC, DIMDI, SilverPlatter, etc.) require an account for access.

There are, however, numerous databases that are available at no cost to you, and no account is required. Two major databases that do **not** require passwords are the **PubMed** database from the National Library of Medicine, and the **Library of Congress**. Most of the general library catalogs have free access.

Note

- ♦ You can download found references directly into an existing EndNote library using *Integrated Library Mode*.
- ♦ We recommend that you use *Online Search Mode* if you do not want the references downloaded to the *All References group*. Using a temporary library is helpful if you want to experiment with potential search strategies or refine a search strategy. You can retrieve batches of references without affecting your permanent library, and then copy only selected references into your permanent library.
- ♦ *Online search* uses the Z39.50 Internet protocol, a standard protocol that was developed just for searching and retrieving bibliographic data. It has limitations:
 - ♦ It does not work through proxy servers.
 - ♦ It does not use the same port your browser uses.
 - ♦ It is not the same protocol your browser uses.



4.2.1 Example 1 – Library of Congress

In the example below you are going to connect with the **Library of Congress** and you are going to search for recent publications about **dinosaurs**. If you want to store the retrieved references in a temporary library, choose the *Online Search Mode* button.

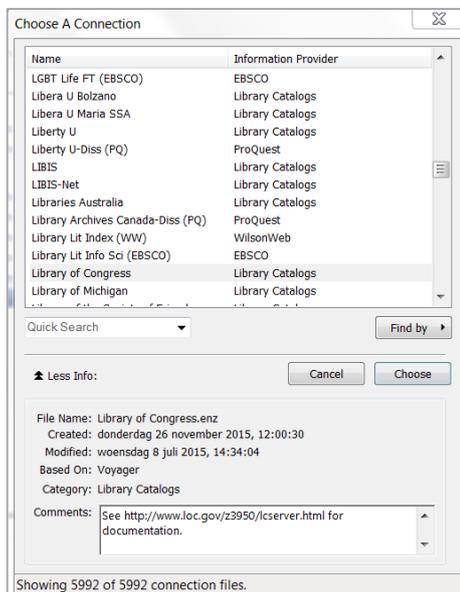
4.2.1.1 Select a Connection File

1. Open the EndNote library that will receive the downloaded references.
2. Click the *Online Search Mode* button.
3. In the group *Online Search* you select the online database.
Use the *More* button to display the *Choose a Connection* dialog.
Select the online database that you would like to search (**Library of Congress**).
4. Click the *Choose* button.

EndNote connects to the online database and displays the Search panel.

4.2.1.2 Search an Online Database

1. Enter your search request in the Search panel (**dinosaur, 2016**).
2. Click the *Search* button.
EndNote displays the number of references that were found.



3. Click *OK* to store the retrieved references in a temporary library.
4. Highlight the references you want to copy to your local library.
5. Click the *Copy to Local Library* button.

The references are copied to the selected library and are displayed in a *Copied References* group.



4.2.2 Example 2 – Pubmed

In this example we are looking for publications in the **Pubmed** database.

4.2.2.1 Select a connection file

1. Open the EndNote library that will receive the downloaded references.
2. Click the *Online Search Mode (Temporary Library)* button.
3. In the group *Online Search* you select the online database (**PuBMed (NLM)**)

EndNote connects to the online database and displays the *Search* panel.

4.2.2.2 Search an Online Database

1. Enter your search into the *Search* tab:
Author: **Bo**
Keywords: **electromyography**
2. Click the *Search* button.
EndNote displays the number of references that were found.
3. Click *OK* to store the retrieved references temporarily in the group *Online References*.
4. Highlight the references you want to copy to your local library.
5. Click the *Copy to Local Library*  button.

The references are copied to the selected library and are displayed in a *Copied References* group.

4.3 Importing from online databases

There are many ways to import bibliographic data into your EndNote library:

- ♦ Certain Web sites contain a download button that will send your search results directly to EndNote, pick the correct import option (bibliographic format), 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. How well the information transfers depends on how accurately the information provider has tagged each item of bibliographic information. See chapter 4.3.1 *Direct Export* for information about directly searching and downloading from an online database.
- ♦ If you have access to an online bibliographic database, a university catalog, or a bibliographic database on CD-ROM, you can probably use EndNote's import **filters to import text files** saved or downloaded from these sources. EndNote filters are configurable so they give you the flexibility to import the reference data you need, and eliminate data you do not need. There are two main things you need to know in order to correctly import downloaded references into EndNote:
 - How to download the data in the right output format.
 - Which import filter to use to import the data into EndNote.

Choosing the correct filter is very important if you want the data to be imported in the correct fields. See chapter 4.3.2 *Importing using a filter* and 4.4 *Importing text files*.



4.3.1 Direct Export

Many information provider web sites include a direct export option that allows you to send copies of references directly to an EndNote library. The direct export process automatically selects an EndNote import filter to map bibliographic information into the appropriate EndNote fields. All you need to do is choose the EndNote library into which the data should be imported. This 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 (*Source*: EndNote Help). This is not a complete list, and the number of providers keeps growing, so check our web site at <http://www.endnote.com> for updates!

Information Provider	Type of Data/Access
ALEPH	Various library Web sites
American Psychological Association	PsycInfo Online http://www.apa.org Subscription required
Bibliotech.dk	Library Management System http://bibliotech.dk.au
Bibliotek.dk	Union Catalog http://bibliotek.dk
BioMedCentral	All journals http://www.biomedcentral.com Free access
BioOne	Biomedical http://www.bioone.org Subscription required
Blackwell Synergy	All journals published by Blackwell that are online http://www.blackwell-synergy.com Free access
BMJ	British Medical Journal Tobacco Control Database http://www.bmj.com Free access
Buffalo University	Library catalog http://library.buffalo.edu/ Access for Buffalo University students only
CABI-Direct	CABI Databases http://www.cabdirect.org Subscription required
Canadian Journal of Communication	http://www.cjc-online.ca Subscription required
CCLR	Reference Sight Database provided by the University of Waterloo Centre for Contact Lens Research (formerly Bausch) http://www.referencesight.com Free subscription
Delphion	Patent data http://www.delphion.com Subscription required
EBSCO	All EBSCO databases http://www.ebsco.com/ Subscription required
Ei Engineering Village	Elsevier Engineering Information database http://www.ei.org Subscription required



Information Provider	Type of Data/Access
Elsevier	Science Direct http://www.elsevier.com Subscription required
EMBASE	EMBASE database http://www.embase.com Subscription required
ERIC	ERIC database http://www.eric.ed.gov Free access
ESDS Government	Economic and Social Data Service for the UK, Government Social Data Survey Information http://www.esds.ac.uk/government/search Free access
Google Scholar	Broad literature search http://scholar.google.com/ Free access
HAPI online	Hispanic American Periodical Index (UCLA) http://hapi.ucla.edu/ Subscription required
IEEE	Institute of Electrical and Electronics Engineers, Inc.; All databases http://ieeexplore.ieee.org/
JAMA and Archives	Journal of the American Medical Association http://pubs.ama-assn.org/ Free access
JISC	Joint Information Systems Committee Collections http://www.jisc-collections.ac.uk Subscription required
JSTOR	The Scholarly Journal Archive http://www.jstor.org/ Subscription required
Karger Publishing	Medical and scientific journals http://www.karger.com/ Free access
Los Alamos National Laboratory	Library without walls http://www.lanl.gov/ Free access
MicroPatent	All articles http://www.micropat.org Subscription required
Nature	Scientific data http://www.nature.com Subscription required
Nerac	All articles http://www.nerac.com Subscription required
NISC	All articles http://www.nisc.com Subscription required
OCLC	All databases http://www.oclc.com Subscription required
OhioLink	Multiple databases http://www.ohiolink.edu Subscription required
OVID	All databases http://www.ovid.com Subscription required
Oxford Journals	Journal articles http://www.oxfordjournals.org/ Free access



Information Provider	Type of Data/Access
Pacific Northwest Labs	Internal databases http://www.pnl.gov Internal use only
Patent Cafe	Patent data http://www.patentcafe.com Subscription required
PILOTS	Medical PTS research http://www.ncptsd.va.gov/publications/pilots/ Internal use only
PNAS Online	Online science journal search tool at Boston University http://cybele.bu.edu/biomass/ar/pnas/all.shtml.htm
ProQuest	All databases http://www.proquest.com Subscription required
PubMed	U.S. National Library of Medicine (NLM) http://www.ncbi.nlm.nih.gov/pubmed Free access
ScienceDirect	Full-text scientific database offering journal articles and book chapters from nearly 2,500 journals and 26,000 books http://www.sciencedirect.com/ Free access
Science Magazine	Journals http://www.sciencemag.org Subscription required
Scopus	Scopus http://www.scopus.com Subscription required
St. John of God, Ireland	Medical library http://www.library.sjog.ie Internal use only
Stanford University's HighWire Press	HighWire Press http://highwire.stanford.edu/ Free access
Thieme	Journal publications http://www.thieme-connect.com/ejournals/home.html Subscription required
WebFeat	Federated Search Engine http://www.webfeat.org
Web of Science	Thomson Scientific Subscription required
WilsonWeb	General science and social science journals http://vnweb.hwwilsonweb.com/ Required login



4.3.1.1 Direct Export from ScienceDirect

To export references from ScienceDirect into the EndNote library:

1. Enter following URL <http://www.sciencedirect.com/>
The *ScienceDirect* homepage is displayed.
2. Enter the search data in the *Quick Search* box.
(We look for publications with the keywords **epilepsy child**).
Click the green *Submit Quick Search* button.

Explore scientific, technical, and medical research on ScienceDirect

Search for peer-reviewed journals, articles, book chapters and open access content.

epilepsy X Author name Journal/book title Volume Issue Page Q

Advanced search

3. The search results are displayed.
Use the filters to refine your search.
Mark the references you want to export in your library.
Click the *Export citations* button.

epilepsy Author name Journal or book title Volume Issue Page Q Advanced search

Search results: 17 results found. Save search alert RSS

Refine filters

Year

Publication title

Topic

Content type

Apply filters

Purchase Export Relevance All access types

Common and distinctive patterns of cognitive dysfunction in children with benign epilepsy syndromes Original Research Article
Pediatric Neurology, In Press, Accepted Manuscript, Available online 4 January 2017
Dazhi Cheng, Xiutan Yan, Zhijie Gao, Keming Xu, Xinlin Zhou, Qian Chen
Abstract Purchase PDF - \$35.95

Attention Deficit Disorder and Epilepsy in Children[®]
Reference Module in Neuroscience and Biobehavioral Psychology, 2017
R. Schubert
Abstract Purchase PDF - \$31.50

Changes in quality of life as a result of ketogenic diet therapy: A new approach to assessment with the potential for positive therapeutic effects Original Research Article
Epilepsy & Behavior, Volume 66, January 2017, Pages 100-104
Susan Bruce, Anita Devlin, Linda Air, Lucy Cook
Abstract Purchase PDF - \$39.95

Sleep disordered breathing in children with cerebral palsy Original Research Article
Sleep Medicine, Volume 30, February 2017, Pages 146-150
Engin Koyuncu, Mustafa H. Türkkan, Fatma G. Sarikaya, Neşe Özgirgin
Abstract Research highlights Purchase PDF - \$35.95 Supplementary content

Watch the language! Language and linguistic-cognitive abilities in children with nocturnal epileptiform activity Original Research Article
Epilepsy & Behavior, Volume 66, January 2017, Pages 10-18
Silje Systad, Marit Bjørnsvold, Rune Markhus, Solveig-Alma H. Lyster
Abstract Research highlights Purchase PDF - \$39.95 Supplementary content

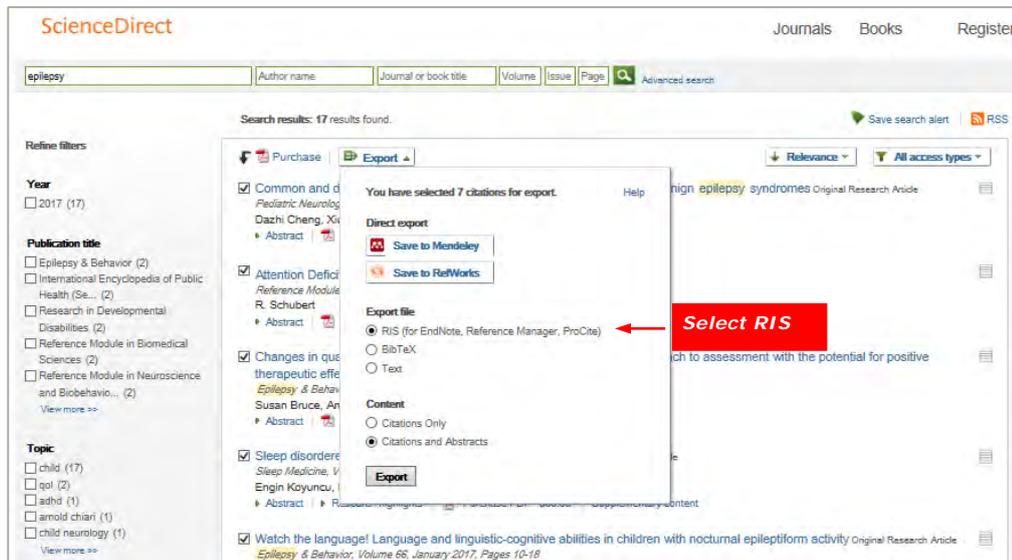
New guidelines for management of febrile seizures in Japan Review Article
Brain and Development, Volume 39, Issue 1, January 2017, Pages 2-9
Jun Natsume, Shin-ichiro Hamano, Kuniaki Iyoda, Hideaki Kanemura, Masaya Kubota, Masakazu Mimaki, Shinichi Nijima, Takuya Tanabe, Harumi Yoshinaga, Noriko Kojimahara, Hirohumi Komaki, Kenji Sugai, Tokiko Fukuda, Yoshihiro Maegaki, Hideo Sugie
Abstract Purchase PDF - \$35.95

Sleep in Children With Cancer and Other Chronic Diseases[®]
Reference Module in Neuroscience and Biobehavioral Psychology, 2017
V.M. Crabtree
Abstract Purchase PDF - \$31.50

Mark the search results



- Select *RIS* (for EndNote, Reference Manager, ProCite).
Click the *Export* button.



- Click the *Open* button in the toolbar below.
The references are imported in the active library.

The imported references are viewed in the *Imported References* Groups pane.

4.3.1.2 Direct Export from WorldCat

To export references from Worldcat into the EndNote library:

- Enter following URL www.worldcat.org
- On the WorldCat homepage:
Click on *Geavanceerd zoeken* (*Advanced Search*).



- Enter the search criteria.
Click on the *Zoeken* (*Search*) button.



Uitgebreid zoeken Zoeken Wissen

Minstens één van onderstaande velden moet zoektermen bevatten

Trefwoord:

Titel:

Auteur:

Zoekresultaten beperken tot (optioneel)

Jaar: tot:
Toon alleen items gepubliceerd vanaf bijv. 1971 bijv. 1977

Publiek:

Inhoud:

Materiaalstype:

Taal:

3

Zoeken Wissen

4. Click on the link

Home Zoeken Maak zelf lijsten, bibliografieën en beoordelingen:
[Aanmelden of een gratis account aanmaken](#)

Deze website maakt gebruik van cookies. Door gebruik te maken van de website gaat u ermee akkoord dat OCLC cookies op uw apparaat plaatst. [Zie hier voor meer informatie.](#)



[Uitgebreid zoeken](#) [Vind een bibliotheek](#)

Zoek resultaten met **'ti:diabetes pregnancy' > '2016..2016' > 'Boek'**

Resultaten 1-2 van ongeveer 2 (.07 seconden) << Eerste < Vorige 1 Volgende >

Medium

Alle materiaalsoorten
 Print book (2)

Uw zoekactie verfijnen

Auteur
[Waldo E Nelson](#) (1)

Jaar
[Alle jaren](#)
 2016

Taal
 Engels

1.  [Textbook of diabetes and pregnancy, third edition website associated w/ book](#)
 Print book: [Alle materiaalsoorten en talen bekijken >](#)
 Taal: Engels
 Uitgever: [Place of publication not identified] . Crc Press, 2016.
 Database: WorldCat
[Alle edities bekijken >](#)

2.  [Nelson Textbook of pediatrics](#)
 door Waldo E Nelson; Robert M Kliegman; et al
 Print book: [Alle materiaalsoorten en talen bekijken >](#)
 Taal: Engels
 Uitgever: Philadelphia : Elsevier, ©2016.
 Database: WorldCat
[Alle edities bekijken >](#)

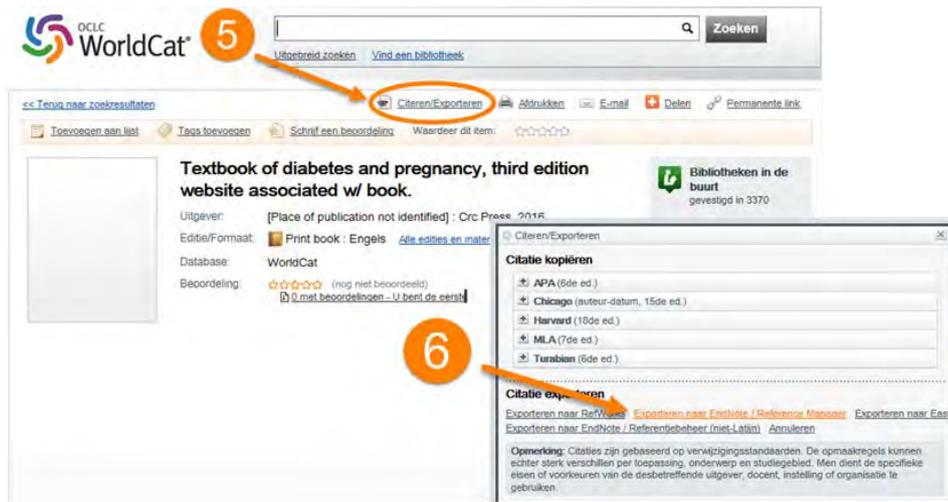
4

Resultaten 1-2 van ongeveer 2 (.07 seconden) << Eerste < Vorige 1 Volgende >

5. Click on the *Citeren/Exporteren* button.

6. Click on the *Exporteren naar EndNote / Reference Manager* button.



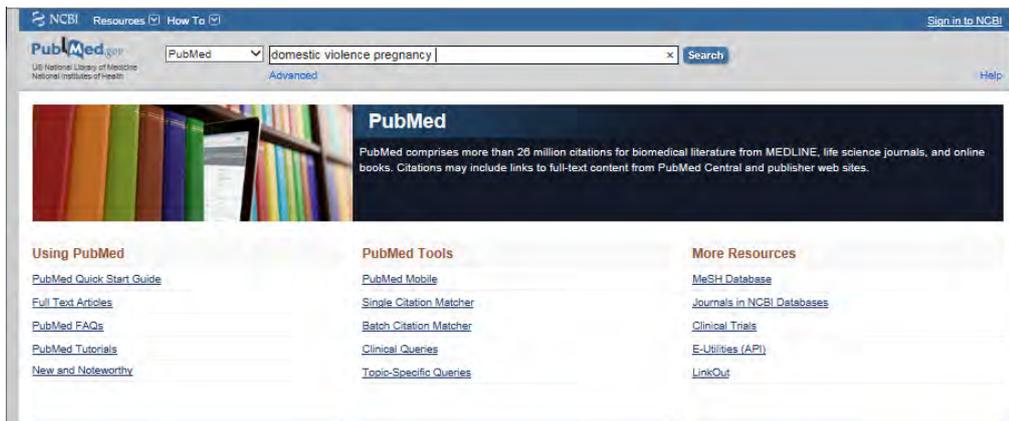


7. Click on the *Open* button to download the RIS-file and import the result directly in the EndNote library.

4.3.1.3 Direct Export from PubMed

In chapter 4.3.2 *Importing using a filter* we explain how to export references from PubMed using a filter (old method). Now you can export search results directly to an EndNote library. The method is explained below:

1. Go to the PubMed Web Site at <http://www.pubmed.gov>
2. Enter your search criteria in the *Search* field or
Click the *Advanced* link in order to define your search more precisely.
Click the *Search* button.



- The search results are displayed.
Select the needed data you want to import into your EndNote library.
Click the *Send to* link.

The screenshot shows the PubMed search results page for the query "domestic violence pregnancy". The search results are sorted by "Most Recent" and show 602 items. A red arrow points to the "Send to" button located in the top right corner of the search results area. The search results list includes several articles, with the first one being "The Prevention of Child Maltreatment Through the Nurse Family Partnership Program" by Eckenrode J, Campa MI, Morris PA, Henderson CR Jr, Bolger KE, Kitzman H, Olds DL, published in Child Maltreat. 2016 Jan 1;1077559516885185. doi: 10.1177/1077559516885185. [Epub ahead of print] PMID: 28032513.

- Select *Citation manager*.
Click the *Create File* button to export your selected records directly to EndNote.

The screenshot shows the PubMed search results page for the query "domestic violence pregnancy". The search results are sorted by "Most Recent" and show 602 items. The "Send to" menu is open, and the "Citation manager" option is selected. The "Create File" button is visible at the bottom of the menu. The search results list includes several articles, with the first one being "The Prevention of Child Maltreatment Through the Nurse Family Partnership Program" by Eckenrode J, Campa MI, Morris PA, Henderson CR Jr, Bolger KE, Kitzman H, Olds DL, published in Child Maltreat. 2016 Jan 1;1077559516885185. doi: 10.1177/1077559516885185. [Epub ahead of print] PMID: 28032513.

The selected PubMed records will appear in a temporary group called *Imported References* in the Groups panel.

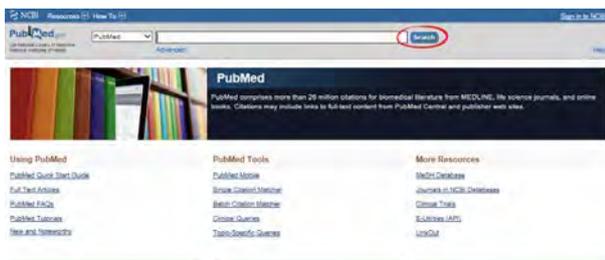
4.3.2 Importing using a filter

Perhaps you will no longer apply the process described below, because from now on you can import data from PubMed directly into the EndNote Library. See chapter 4.3.1.3 *Direct Export from PubMed*.



In the example below, we look for data in the PubMed database and we save the results as a text file. In chapter 4.4 *Importing text files* we explain how to import the text file in the EndNote database using a filter.

1. Go to the PubMed Web site <http://www.PubMed.gov>
2. Enter the search criteria in the *Search* field.
Click the *Search* button.



3. Select the results you want to import in the database.
Click on the *Send to* link and select *File*.
Select MEDLINE in the *Format* box.
Klik the button.
This will bring up a toolbar allowing you to save your selected references as a text file.
4. Click the *Save* button to save the file to your computer. Save the file somewhere easily accessible such as your desktop. The default file name is **pubmed_results.txt**. You may change the file name, but we recommend saving the file with the .txt extension.

See chapter 4.4 *Importing text files* how to import a text file in EndNote.

4.4 Importing text files

Text files result from downloading references from many online, CD-ROM or World Wide Web database services. They can be imported with the import module. This method can be much quicker and more effective than manually entering references.

Before importing references, make sure the files are in a format that the import filter can read. In order for the import filter to read a text file, it must be in a delimited format (such as the Tab-delimited or EndNote import format). A delimiter is a character, like a hard return or a tab, that is inserted between fields. Each part of each reference needs to be preceded by a delimiter.

Once you have a file in the proper format and you know which import option or filter to use, the import instructions are the same for all of these types of data.

- ♦ **Open** the library where you would like to save these references.
- ♦ Choose *File > Import > File*.
Use the *Choose File* button to select the **text file**;
In the *Import Option* box you enter the name of the **filter**;
In the *Text Translation* box you select the option **Unicode (UTF-8)**.

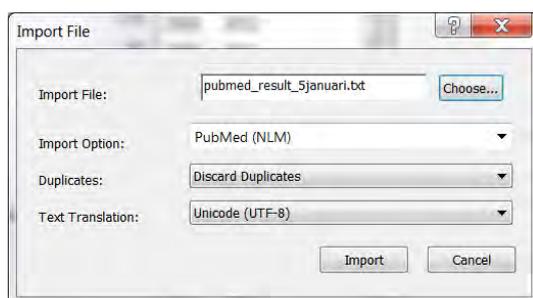
The last option is very important if you want to import diacritical characters in a correct way.



4.4.1 Importing using the PubMed filter

In this exercise we import the PubMed text of the previous exercise to the library.

1. Click the *Import*  button or Choose *File > Import File*.
2. In the *Import File* dialog you select following options:
 - Click the *Choose File* button and select the source text file.
 - In the *Import Option* box you select *Pubmed (NLM)*.
 - In the *Text Translation* box you select *Unicode (UTF-8)*.
 - Click the *Import* button.

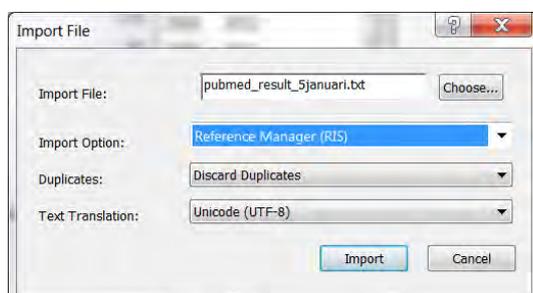


The imported references are viewed as *Imported References* in the *Groups* panel.

4.4.2 Importing using the RIS filter

The RIS filter is used to import text files exported from Reference Manager, ProCite, Reference Web Poster or any other source that uses the RIS format. In this exercise we import a RIS text file, created from a ProCite database. When importing records, we recommend that you import the data into a temporary new library.

1. Click the *Import*  button or Choose *File > Import File*.
2. In the *Import File* dialog you select following options:
 - Click the *Choose File* button and select the source text file.
 - In the *Import Option* box you select *Reference Manager (RIS)*.
 - In the *Text Translation* box you select *Unicode (UTF-8)*.
 - Click the *Import* button.



 **Note**

- When you want to import a text file, you need to know the source (the provider or the service) of this file in order to choose the right import filter.
- When importing records, we recommend that you import into a temporary new library, determine which ones you want to keep, and then move those records into your permanent library.
- Files with the **.RIS** extension are recognized by Reference Manager, EndNote and ProCite and are imported directly into the database after you double-clicked on the file.
- The EndNote Web site <http://www.endnote.com> contains technical support tips, utilities for data transfer, and information about the latest versions of EndNote. You can also find updated styles, filters, connection files, and other related documents at this site. Go to the Web site and look under Support and Services.
- Although EndNote tries to provide many flexible ways to get data from other sources into EndNote, the program can not import data from all sources. In some cases, you may have to write your own import filter, or you may need to manipulate the data in a word processor before it can be imported.

4.5 Importing PDF files or folders

This feature allows you to convert existing collections of PDF files into new EndNote references by extracting Digital Object identifiers (DOI) from PDF files. At the same time, the PDF file is linked to the new reference. More information, see chapter 8.9 PDF Handling.

4.5.1 Importing PDF files

To import a PDF file:

1. Open the library into which you want to import the references.
2. Choose *File > Import > File*.
3. In the *Import File* dialog you select following options:
 - Click the *Choose File* button
 - Locate and select the PDF file
 - Click the *Open* button.
4. From the *Import Option* box select *PDF*.
5. From the *Duplicates* box select an option:
 - *Import All*: imports all references, including duplicates.
 - *Discard Duplicates*: imports all references except duplicates.
 - *Import into Duplicates Library*: Duplicate references are imported into a library called *File-Dupl.enl*, where "File" is the name of the library into which you are importing.
6. From the *Text Translation* box select an option (e.g. *Unicode (UTF-8)*).
7. Click the *Import* button.

 **Note**

- When performing the import function, if there are two DOI's found in the first two pages of a PDF document, EndNote will put at least one DOI in the DOI field for data extraction. The PDF is then attached and the file name is put in the *Title* field.
- When the import is complete, the new record is stored in the *Imported References* group, and will include bibliographic information given for the *Digital Object*



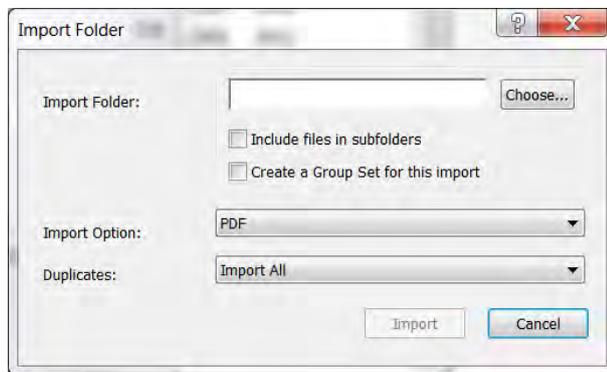
Identifier (DOI) mined from the PDF file such as *title, author, volume, issue, page, year, and DOI*.

- ♦ The *Imported References* group is a temporary group that is replaced each time you import another set of references. It is removed when you exit EndNote.

4.5.2 Importing PDF folders

To import a PDF folder with PDF files:

1. Open the EndNote library into which you want to import the references.
2. Choose *File > Import > Folder*.
3. In the *Import Folder* dialog you select following options:
 - Click the *Choose* button to open the *Browse for Folder* dialog.
 - Select the needed PDF folder
 - Click OK.



4. If the selected folder lists subfolders, click the *Include files in subfolders* check box to include PDF files in those sub-folders in the import operation.
5. From the *Import Options* list, select the *PDF* option.
6. From the *Duplicates* list, select an option:
 - ♦ *Import All*: imports all references, including duplicates.
 - ♦ *Discard Duplicates*: imports all references except duplicates.
 - ♦ *Import into Duplicates Library*: duplicate references are imported into a library called ***File-Dupl.enl***, where ***File*** is the name of the library into which you are importing.
7. Click the *Import* button to import the PDF files from the selected folder to your library.



5 Working with a library

To work with individual references (for example to copy, open, export or edit them) it's important to know how to select, sort and navigate in the library. See also *1.7 Keyboard commands*.

5.1 Selecting

Click once	To select one reference You can also select a reference by typing the first few letters found in the field by which the library is currently sorted.
<Ctrl> + click	Hold down the <Ctrl> key while clicking on individual references.
<Shift> + click	To select a range of references 1 Click on the first reference 2 Press the <Shift> key 3 Click on the last reference of the range.
<Ctrl+A>	To select/highlight all references. Press <Ctrl+A> again to make the selection disappear
<Home>	To select/highlight the first reference in the library
<End>	To select/highlight the last reference in the library
Up arrow	To select/highlight previous reference in the library
Down arrow	To select/highlight next reference in the library

5.2 Navigating

5.2.1 Navigating in the Library window

Vertical scroll bar	Scroll through the list of references by clicking in the vertical scroll bar with the mouse
	Move down from the currently selected reference
	Move up from the currently selected reference
<Page Up>	Move up a screen of references
<Page Down>	Move down a screen of references
<Home>	Go to the first reference in the library
<End>	Go to the last reference in the library
Up arrow	Select/highlight previous reference
Down arrow	Select/highlight next reference

You can quickly sort the references by clicking on a column heading. Typing a letter selects the first matching references. The matching depends on the order in which the library is sorted.

5.2.2 Navigating in the Reference window

	Previous reference
	Next reference
<Tab>	Next field
<Shift+Tab>	Previous field
<Ctrl + J> or <i>References/Go to...</i>	Use this command to jump to specific text within a reference

5.3 Sorting

This is how you can change the sort order of the library:

- Click the columnheader in the library list or
- Choose *Tools > Sort Library* in the menu;

5.3.1 Using the mouse

Click the column header Author to sort the library by author names

Rec...	Year	URL	Author	Title	Journal	Reference Type	Keywo...
2340	2017		Volckaert, Mariël	EndNote X8. Geef publicaties een...		Electronic Book	EndN...
2339	2017			Quick Reference Guide EndNote ...		Journal Article	
2335	2012		Vonk, Jennifer; Shac...	The Oxford handbook of compar...	Oxford Lib...	Edited Book	Evolut...
2306	2012		Taylor, A. H.; Miller, ...	New Caledonian crows reason ab...	Proceedin...	Journal Article	evolut...
2303	2012		Shettleworth, S. J.	Do animals have insight, and wha...	Canadian ...	Journal Article	insight
2305	2012		Shanahan, M.	The brain's connective core and i...	Philos. Tra...	Journal Article	anima...
2304	2012		Schloegl, C.; Schmid...	Grey parrots use inferential reaso...	Proc. R. So...	Journal Article	grey p...
2336	2012	ht...	Pepperberg, Irene M.	Symbolic communication in the g...	The Oxfor...	Book Section	Parrot...
2308	2012		Goto, K.; Watanabe,...	Large-billed crows (<i>Corvus macro...</i>	Animal Co...	Journal Article	Meta...
2267	2011		Zorina, Z. A.; Obozo...	New data on the brain and cogni...	Zoologisch...	Journal Article	crows ...
2311	2011		Smirnova, A. A.	Use of numerical symbols by birds	Zoologisch...	Journal Article	parrot...
2309	2011		Smirnova, A. A.	On the capability of birds for sym...	Biology Bu...	Journal Article	anima...
2301	2011	ht...	Seftel, Joshua	Profile: Irene Pepperberg & Alex	NOVA Sci...	Podcast	avian i...

5.3.2 Using the menu

The *Sort Library* command provides a way to arrange all references showing in the Library window for browsing, exporting, printing, or copying. EndNote libraries are typically sorted by the first author's last name and first initial, year, and record number.

1. Choose *Tools > Sort Library*.
2. The *Sort Options* dialog appears.
Select one or more fieldnames from the lists in the dialog. Enter the field names in the order you want the references sorted.
3. Click *OK*.



5.4 Viewing/Hiding references

When working with references in your EndNote library, you can view all of the references or just a subset. The subset can be the result of commands *Search Library*, *Import*, *Show Selected References* and *Hide Selected References*.

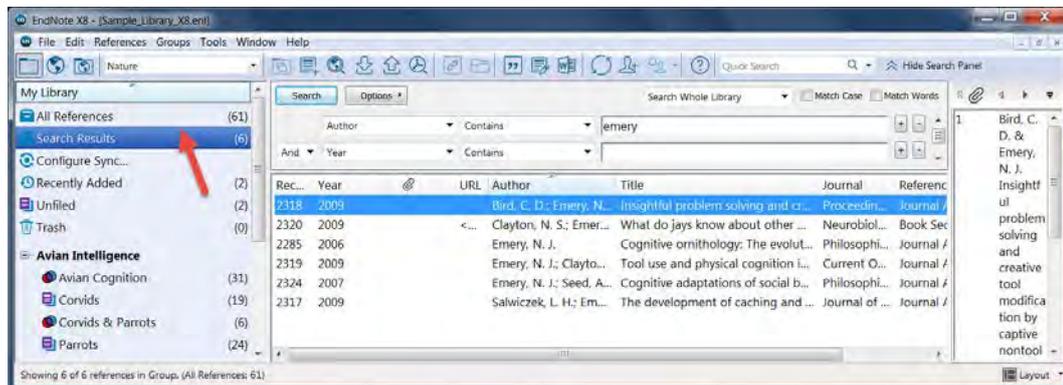
For example, if you search for references and find 25 matching references, only those 25 references will appear in the reference list. The words '*Showing x out of x references*' will appear at the bottom of the library window.

Many EndNote commands (such as *Search Library*, *Change and Move Field*, *Change Text*, *Sort*, *Print*, and *Export*) can be instructed to work with just those references that are 'showing' in the Library window. Here are a few examples of operations that you can do with the showing references:

- Restrict the *Search Library* command to search only the showing references.
- Add the results of a new search to the currently showing references, as a way to combine search results.
- Use the *Change Text*, and *Change Field*, and *Move Field* commands to modify only the showing references.
- Use the term lists' *Update List* command to scan only the showing references for new terms.
- Create a *Subject Bibliography* from the showing references.
- *Print* or *Export* only the 'showing' references.

5.4.1 Show Search Results

The window below displays the *Search* results in the *Sample_Library.enl*. The references are viewed in the *Search Results* group.

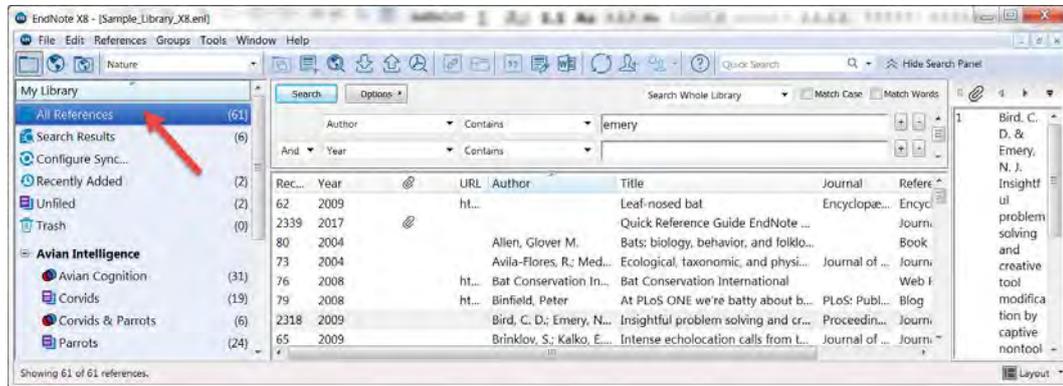


The status area at the bottom of the library displays the number of references per group and the number of references in the library.



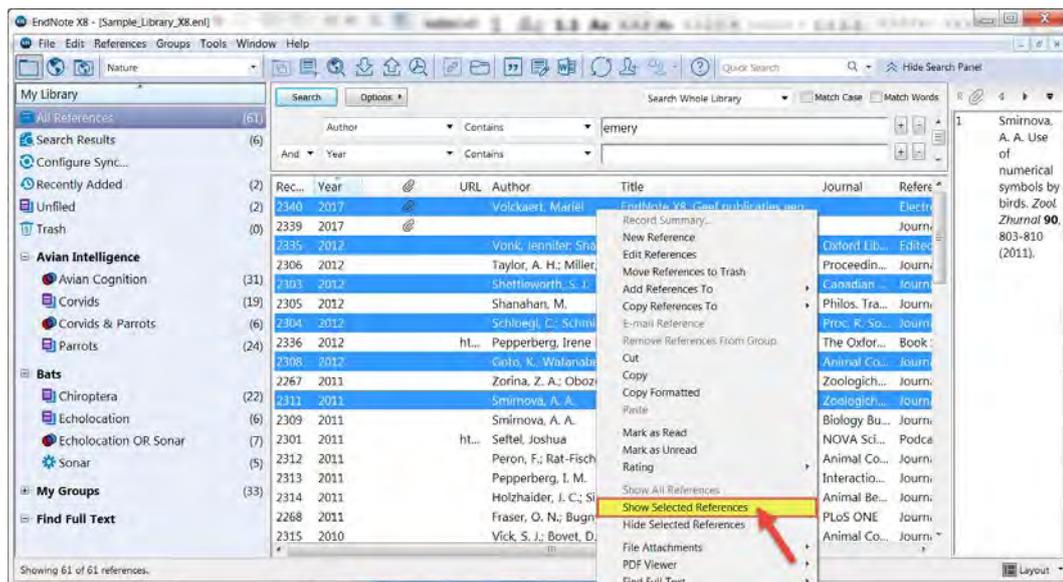
5.4.2 Show All References

Click *All References* in the Groups panel to display all the references in the library window.

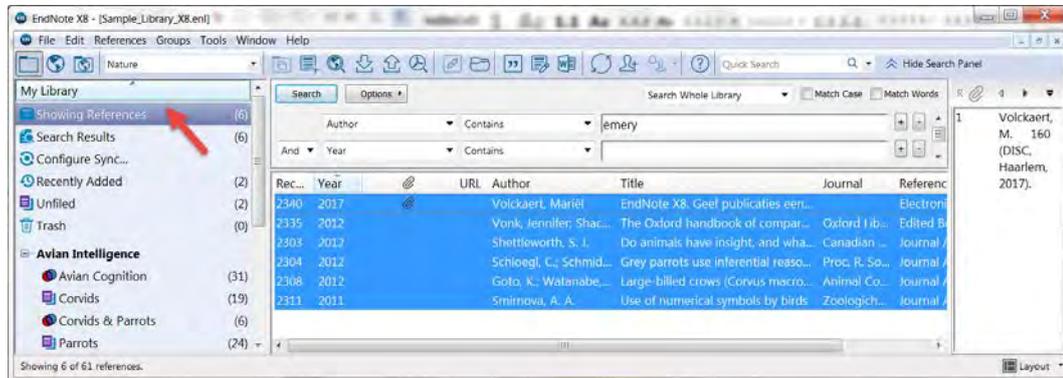


5.4.3 Show Selected References

In the example below a few references in the *Sample* library are selected.



If you right-click in a selection and you choose *Show Selected References* in the context sensitive menu, the result is displayed below. Do not forget to choose *Show All References* if you want to display the whole library.



5.4.4 Hide Selected References

The *Hide Selected References* command is similar to the *Show Selected References* command except that it temporarily hides the selected references in the Library window from view. After you have completed your work with the showing references, do not forget to choose *Show All References* to display the whole library.



5.5 Searching

There are a number of ways to search through your library:

- *Typing a letter* selects the first matching reference found in the field by which the library is currently sorted (click on a column heading to sort the references).
- The *Quick Search*.
- The powerful *Search Library* (Ctrl+F) command enables you to locate specific references or groups of references. You can use the Search tab to search EndNote libraries as well as remote databases that are available online; see 4.2 *Importing with 'Online Search' command*.

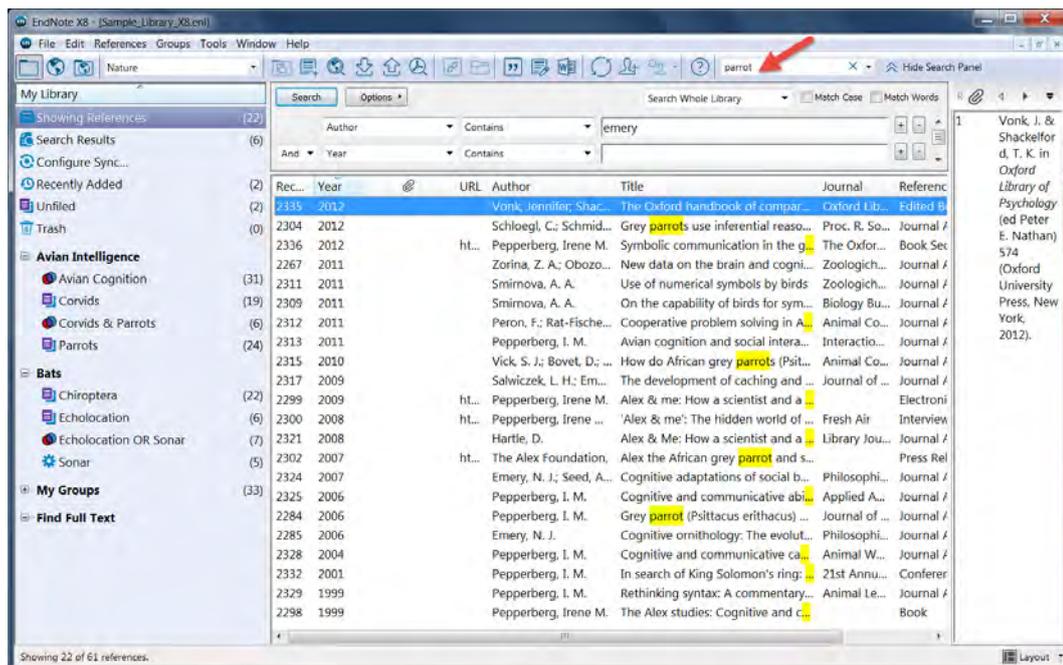
5.5.1 Searching by typing the first letters of the item

Typing a letter selects the first matching reference. The matching depends on the order in which the library is sorted. If the library is sorted by the **Author** field, typing a letter selects the first reference in which the author's last name begins with that letter. For example, typing the letter '**P**' selects the **Palencia** reference in our Sample library since Palencia is the first author's name to begin with a '**P**'. Type several letters and the selection jumps to the first name that begins with those typed letters. If you type '**pol**' the selection jumps to **Pollard**.

5.5.2 Quick Search

To quickly search your library, use the *Quick Search* text box on the Main toolbar. With your library list displayed, enter a word or phrase and press *Enter*. EndNote executes a general search of all fields (also PDF's and PDF Notes). You can use the drop-down list to select a recent search term.

EndNote uses an implied AND Boolean operator when you enter two or more adjacent terms in *Quick Search*. For example, entering African grey parrots is equivalent to entering African AND grey AND parrots.



5.5.3 Searching EndNote libraries

EndNote's search interface provides a simple way to do basic searches on local EndNote libraries and online databases. The same Search tab is used for both purposes.

A powerful and flexible *Search Library* command enables you to locate specific references or groups of references. For example, you can choose a very general search, one that scans the entire library, or you can limit your searches to specific fields (such as Author or Keywords). You can also create more complex searches using a variety of operators such as *And*, *Or*, *Not*, *Contains*, *Is*, *Is less than*, *Is less than or equal to*, *Is greater than*, *Is greater than or equal to*, *Field begins with*, *Field ends with* and *Word begins with*.

There are a number of ways to begin a search:

- Click the Search tab in the Tab Pane or
- Press <Ctrl+F> or
- Choose the *Tools > Search Library*.

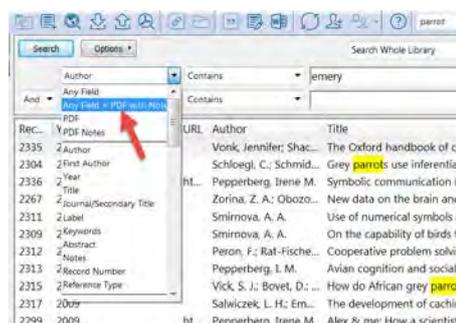
Expand your library retrieval results by adding wildcards before and after search terms. The asterisk represents any group of characters.

- Fields and PDF files can be searched using the asterisk wildcard.
- No minimum character length is required.

5.5.3.1 Searching 'Any Field+PDF with Notes'

You can search all fields and attached PDF files in your selected reference list.

1. Select the *Any Field+PDF with Notes* option from the Field list.
2. Select an item from the Comparison list to indicate how the search term(s) should relate to the search
3. Enter the search term(s) that you want to locate.
4. Click the *Search* button.



5.5.3.2 Searching PDF files

You can search the attached PDF files in your selected reference list.

1. Select the *PDF* option from the Field list.
2. Select an item from the Comparison list.
3. Enter the search term(s) that you want to locate.
4. Click the Search button



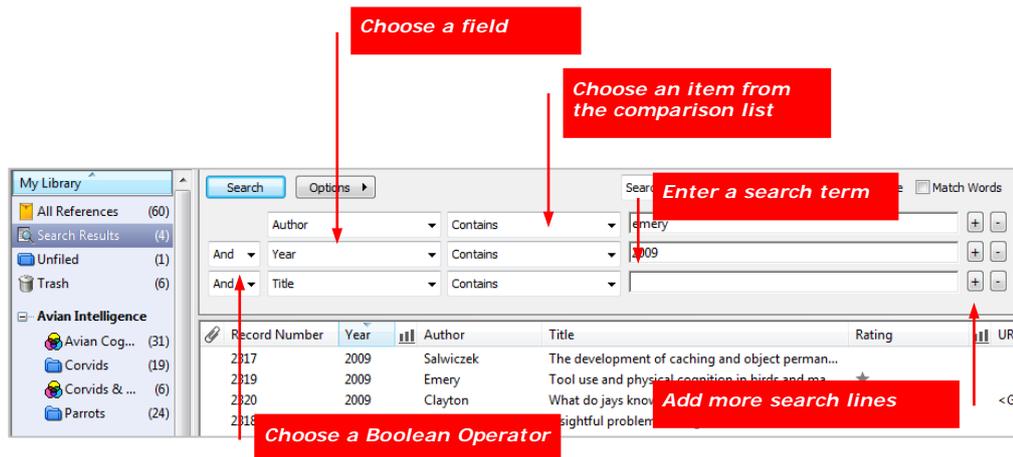
5.5.3.3 Examples

In the following exercises we search in the *Sample_Library.enl*.

EXAMPLE 1 – Search for publications of **Emery** published in **2009**.

1. Open – if necessary - the *Sample_Library.enl*.
2. Click the *Search* tab pane or press <Ctrl+F>.

Use the *Options > Restore Default* button to return the window to the default configuration and to delete the previous search definition.
3. Select the options as shown in the snapshot below.



4. Click the *Search* button.

The search result is viewed in the group *Search Results*.

EXAMPLE 2 - Search for references where the **abstract** field is empty.

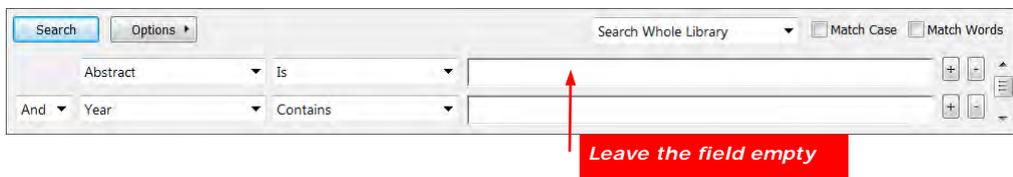
1. Click the *Search* tab pane or press <Ctrl+F>.

Use the *Options > Restore Default* button to return the window to the default configuration and to delete the previous search definition.
2. Select the options shown in the snapshot below.

Select the **Abstract** fieldname.

Select **Is** as the comparison operator.

Leave the search term empty.



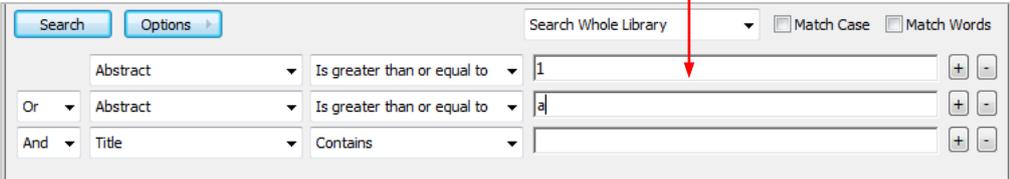
3. Click *Search*.

EndNote finds references in which the chosen field is blank. The search result is viewed in the group *Search Results*



EXAMPLE 3 - Search for references where the **abstract** field contains data.

1. Click the *Search* tab pane or press <Ctrl+F>. Use the *Options > Restore Default* button to return the window to the default configuration and to delete the previous search definition.
2. Select the options as shown in the snapshot below. Select the **Abstract** fieldname. Select **Is greater than or equal to**. Press <Tab> and enter figure **1**. Choose **or**. Select the fieldname **Abstract**. Select **Is greater than or equal to**. Press <Tab> and enter **a**.



The screenshot shows the EndNote search interface. At the top, there are buttons for 'Search' and 'Options'. Below these, there is a search configuration area. The first row shows 'Abstract' selected in the field name dropdown, 'Is greater than or equal to' in the operator dropdown, and '1' in the search term input field. The second row shows 'Or' in the connector dropdown, 'Abstract' in the field name dropdown, 'Is greater than or equal to' in the operator dropdown, and 'a' in the search term input field. The third row shows 'And' in the connector dropdown, 'Title' in the field name dropdown, and 'Contains' in the operator dropdown. To the right of the search term input fields are '+' and '-' buttons. Above the search configuration area, there is a dropdown menu for 'Search Whole Library' and checkboxes for 'Match Case' and 'Match Words'. A red arrow points from a red box containing the text 'Look for 'Abstract' fields containing data' to the first search term input field.

3. Click *Search*. The search result is viewed in the group *Search Results*

Note

- You can search one library at a time.
- By default, EndNote ignores capitalization when searching for text in a library. For example, a search for the text **u**niversity also finds **U**niversity.
- When you select the *Match Words* option, EndNote finds exact matches of the search term rather than partial-word matches. For example, a search for the term **state** finds references with the word 'state' while ignoring words like 'statehood' or 'understated.'
- Choose *Options > Save Search* to save a search you frequently use.
- Choose *Options > Load Search* to load the search you saved.

5.5.4 Finding duplicate References

The *Find Duplicates* command searches the references that are currently showing in the Library window to identify duplicates (based on the duplicate criteria specified in the preferences, see chapter 8.4 *Duplicates*).

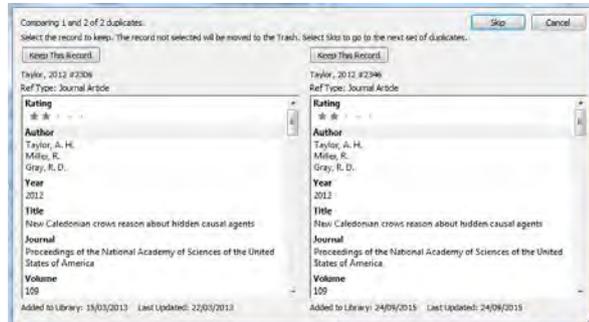
By default, references are considered duplicates if they have the same reference type (such as Journal Article or Book), and the *Author*, *Year*, and *Title* fields are identical. The criteria for detecting duplicates can be changed using the Duplicates settings in the menu *Edit > Preferences > Duplicates*.

To find all of the duplicate references in your library proceed as follows:

1. Open the library in which you may locate duplicate references.
2. Choose *References > Show All References* to display the whole library.
3. Choose *References > Find Duplicates*.
4. EndNote will display a *Find Duplicates* dialog where you can compare duplicates and decide which version to keep and which to delete.

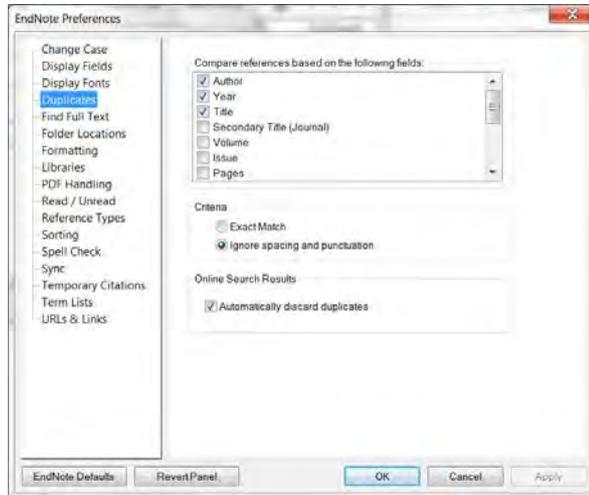


- Click the *Keep This Record* button to keep the chosen reference. The other reference disappears in the Trash.
- Click the *Skip* button to keep the two references. The two references are viewed temporary in the *Duplicate References* group.



The criteria for detecting duplicates can be changed using the Duplicates settings in EndNote's *Preferences* dialog:

1. Choose *Edit > Preferences > Duplicates*.
2. The dialog *EndNote Preferences* appears:
To select the fields that EndNote should compare when finding duplicate references, click in the check boxes to the left of the field names. By default, EndNote identifies duplicate references in a library as references of the same reference type with matching Author, Year, and Title fields.
3. Click *OK*.



Note

- We strongly suggest that you check the duplicate references before deleting them.
- Before deleting duplicates, check the record numbers to be sure that you are not deleting references already cited in a paper.

5.5.5 Searching Online Databases

See chapter 4.2 *Importing with 'Online Search'* .



5.6 Finding Full Text

EndNote can attempt to locate full text files on the Web by using data stored in your references. Once found, EndNote downloads and attaches the files (**PDF** and **URL**) to the references. The file attachments are saved as a relative link to the *File Attachments* field. The file itself is stored in the current library's **.DATA** folder.

EndNote can use these methods when searching for full text publications:

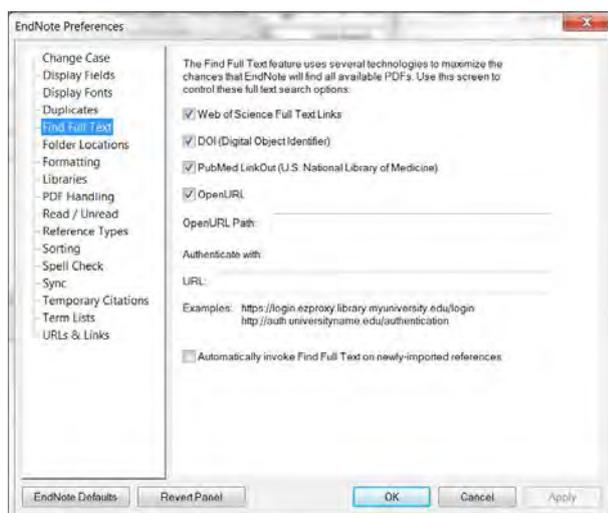
- ♦ Web of Science Core Collection Full Text Links
- ♦ DOI (Digital Object Identifier)
- ♦ PubMed LinkOut (U.S. National Library of Medicine)
- ♦ OpenURL

EndNote will try to use all of these methods to optimize the likelihood of finding full text files associated with your bibliographic records.

5.6.1 Settings

The *Find Full Text* preferences allow you to control over which sites, services, and technology EndNote uses when attempting to find the full text for a reference. You can limit the options in order to speed up the Find Full Text operation.

1. Choose *Edit > Preferences > Find Full Text*.
2. In the *EndNote Preferences* dialog, the check boxes determine which pieces of information will be used from your EndNote references. These represent unique identifiers for locating exact reference matches.
3. If your institution allows access to an OpenURL server, you can configure this panel to allow EndNote access to the site. Select the *OpenURL Path* checkbox and enter the OpenURL path to direct to the online site.
4. If the site requires authentication to verify that you are allowed access, you can enter an *Authentication URL*. The Authentication URL directs to the site's login page. When you attempt to *Find Full Text*, you will be directed to that page to enter authentication information (typically a user ID and password).



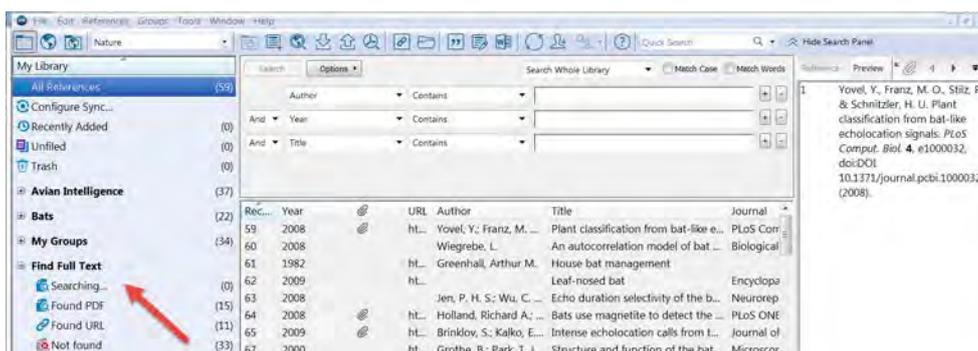
5.6.2 Find Full Text

The *Find Full Text* command is not available in *Online Search Mode*. To find and retrieve full text:

1. Select the reference(s) to which you want to add *full text*.
2. Choose *References > Find Full Text > Find Full Text* or Right-click in the selected references to select *Find Full Text > Find Full Text*.
Optional: If you have entered an OpenURL address and authentication URL under *Find Full Text preferences*, you may be directed to a login web page for your institution's library. Follow the instructions to log in, such as entering the appropriate User ID and password. Once you are logged in, click *Continue*.

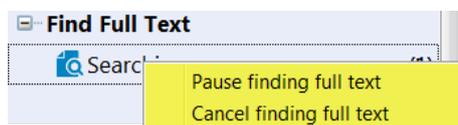
EndNote begins searching for and downloading full text for the selected references. Full text downloading happens in the background, which may affect the performance of other operations. References appear in groups under a *Find Full Text* group set. The results of a Find Full Text search remain for the current session until you close the library. The categories include: *Searching*, *Found PDF*, *Found URL*, *Not found*.

If you run the *Find Full Text* operation more than once during a single library session, the additional references are added to the references already found in the *Find Full Text* groups.



You can cancel or pause the *Find Full Text* operation at any time:

1. Right-click on the *Find Full Text* Searching group.
2. In the context-sensitive menu you can choose between *Pause finding full text* or *Cancel finding full text*.



Note

- In order to find full text, cookies must be turned on in *Internet Explorer*.
- The *Find Full Text* command can attempt to find full text documents for up to 250 records at a time.
- The *Web of Science Core Collection* free journal set is checked for all users; subscribers may have full IP-based access to all resources. In cases where full text PDF files require a subscription, and you or your institution have the appropriate access, EndNote will attempt to authenticate and automatically download the appropriate files.



5.7 Finding Reference Updates

With the *Find Reference Updates* option you can select and update individual references or multiple references from the *Review Available Updates* dialog by retrieving information from source databases outside EndNote such as Web of Science Core Collection and PubMed. EndNote searches for and retrieves available field updates for the selected reference. The *Find Reference Updates* option is available:

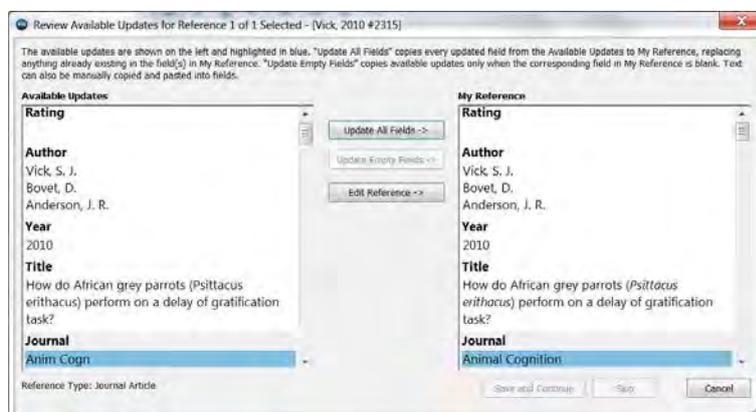
- From the *References* menu.
- As an icon  from the Reference window (in an opened reference).
- From the *Edit & Manage Citations* dialog in Microsoft Word.

EndNote follows the following process when searching for field updates.

- EndNote first looks for the *DOI* (Digital Object Identifier) that matches the DOI of the selected record. If a reliable match is found, EndNote displays the *Review Reference Updates* dialog and displays the field updates.
- If EndNote cannot find a matching *DOI* number, it looks for the author name, year of publication, and journal title that matches the selected record. If a reliable match is found, EndNote displays the *Review Reference Updates* dialog and displays the field updates.
- If no match is found, then no dialog displays.

To update a reference:

1. Select one or more references from the Reference List or Open a reference in the Reference window.
2. Choose *References > Find Reference Updates*.
3. The *Review Available Updates* dialog is displayed.
All updates are highlighted in blue in both the *Available Updates* and the *My Reference panels*. An update exists for a field in the *My Reference panel* when the field is empty or differs from the information in the same field in the *Available Updates panel*. For each update that EndNote finds for a record, you can:
 - Click the *Update All Fields* button to update all the fields in the *My Reference panel* with updated information from the *Available Updates panel*.
 - Click the *Update Empty Fields* button to update every empty field in the *My Reference panel* with the new information from the *Available Updates panel*.
 - Click, if necessary, the *Edit Reference* button to edit any field.



4. Click the *Save Updates* button to save your changes.
5. Click *OK* when the EndNote dialog appears prompting you to save your changes.



5.8 Groups

Groups make it easy to arrange and organize a large library into subsets. A group simply points to a subset of references that already exist in the library. You can further organize your references by storing multiple groups in group sets.

5.8.1 Group Sets

You can also create any number of *group sets*. Group sets can contain any combination of custom groups, smart groups, and combination groups. Group sets are indicated by group set headings in the Groups panel. Each set may list a number of groups. Some group sets are permanent and cannot be removed: *Online Search, EndNote Online, Find Full Text*.

Expand or collapse the list under a group set heading by clicking the triangle plus (+) or minus (-) icon. When a set is collapsed, the number next to the group set heading reflects the total number of references found in all groups in the set.



5.8.2 Types of Groups

There are several types of groups (see image below). The first section of groups are automatically generated, and include both permanent groups and temporary groups.

1. **Permanent Groups** include *All References, Recently Added, Unfiled* and *Trash*. These are groups that you cannot remove or rename.
2. **Temporary Groups** include *Copied References, Duplicate References, Imported References, Search Results* and several *Full Text* groups. These temporary groups may be replaced as you use commands in EndNote, and are always deleted when you close a library.
3. **Recently Added Group**  is built into each X8 library (shared, unshared, syncing and un syncing) which allows users to see the latest references added. The group is handled on a library by library basis and is not built into global preferences so that it can be set to display the last 24 hours in one library and last 30 days in another.
4. **Custom Groups**  are manually created by the user to help organize the library.
5. **Smart Groups**  use search criteria to dynamically update groups as existing references are edited or new references are added to the library.
6. **Combination Groups**  help you to better organize your EndNote references. Combine groups and use AND, OR, and NOT to create new, useful smart groups. Save references in groups and then save sets of groups in group sets. You can collect both custom groups and smart groups within the same combination group set.
7. **Online Search** groups allow you to easily initiate a search of a favorite online database and quickly view the latest download.
8. **Find Full Text** groups are temporary, and appear only when you use the *Find Full Text* command.



5.8.3 *Displaying or hiding groups*

5.8.3.1 *The Groups Panel*

Groups are listed in the left panel of the Library window along with a record count for each group.

- Click a minus sign (-) next to a group set heading to hide the list of groups under that heading. Click a plus sign (+) next to a group set heading to display the list of groups in that group set.
- Select *Groups > Hide Groups* if you do not want to display the groups.
- Select *Groups > Show Groups* to display the groups.

5.8.3.2 *Display Modes*

You can work in *Local Library Mode* or switch to *Integrated Library & Online Search Mode* or *Online Search Mode*.



- **Local Library Mode:** Displays automatic groups, custom groups, and smart groups, but not Online Groups. This mode keeps you from inadvertently downloading references found during an online search into your currently open library. This is the default mode.
- **Online Search Mode:** Search and download references from online databases. In this mode, only Online Search groups are available. References are downloaded into a temporary library. They are removed when you close EndNote.
- **Integrated Library & Online Search Mode:** All groups and commands are available. When you download references from an online database, EndNote saves them to a group under the Online Search group set and to your open library.

5.8.4 *Custom Groups*

5.8.4.1 *Creating a new custom group*

You have two options for creating a custom group:

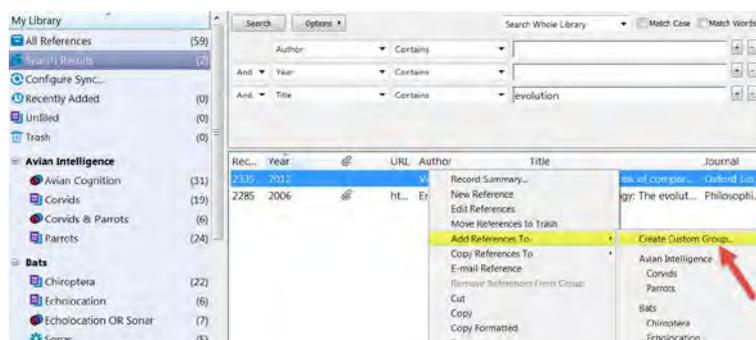
- You can **select references** and then add them to a new group,
- You can **create a new group** and then add references to it.

For the first method proceed as follows:

1. Select the references you want to add to the new group (use <Shift> or <Ctrl>).
2. Right click on the selection.



3. Select *Add References To* and click *Create Custom Group*.



4. The *New Group* is listed In the left pane.
Enter a group name (the name *New Group* disappears).

For the second method you can work with the right mouse button:

1. Right click in the *Groups* pane.
2. Select *Create Group* in the contextual menu.
3. Enter the name of the new group and press <Enter>.
The new group is listed alphabetically in the left pane.
4. Add references to the new group.

If you prefer to use the menu, proceed as follows:

1. Choose *Groups > Create Group*.
2. Enter the name of the new group and press <Enter>.
The new group is listed alphabetically in the left pane.
3. Add references to the new group.

5.8.4.2 Adding references to a Custom Group

1. Select the references you want to add to the group.
2. Right click on the selected references to display a contextual menu.
3. Select *Add References To* and
Select either the name of an existing custom group or *Create Custom Group*.

5.8.5 Smart Groups

Smart groups are built with search strategies. Smart groups are dynamically updated as you add references to and edit references in the library.

5.8.5.1 Creating a Smart Group

1. Choose *Groups > Create Smart Group*.
2. Enter a name for the group.
Enter your search strategy.
3. Click the *Create* button to create a *New Smart Group*.

5.8.5.2 Creating a Smart Group from an existing Search Strategy

If you have already created and saved a search strategy to find a subset of references, you can use the saved search strategy to create a smart group.

1. Click on *All Refererences* in the *Groups* pane to display all references in the library.
2. Click the *Search* tab in the *Tabs* pane below.



3. Click *Options* and select *Load Search* (.enq file in the *Searches* folder).
4. Open the search strategy to load it into the Search tab.
5. Click *Options* and select *Convert to Smart Group*.
A *Converted Search* group is created under *Smart Groups*.
6. Right click on the *Converted Search* group name to display a contextual menu.
Select *Rename Group*
Enter the new group name.

The group will be updated with matching references each time you save a reference.

5.8.5.3 *Editing a Smart Group*

To edit a smart group:

1. Right click on the Smart group name to display a contextual menu.
2. Select *Edit Group*.
The current search strategy is displayed.
3. Modify the search strategy and click *Save*.

5.8.6 **Combination Groups**

If you want a better organisation of your references, you can combine custom and smart groups under a single group. Use AND, OR, and NOT logic to create new, useful combined group sets. Save references in custom and smart groups, and then save these sets of groups as a combined group set.

5.8.6.1 *Creating a Combination Group*

1. Choose *Groups > Create from Groups*.
The *Create from Groups* dialog is displayed.
2. Enter a name for the combination group.
3. In the fields under the *Include References*, select up to 10 custom and/or smart groups to use as your search criteria.
4. Use AND, OR, NOT to include or exclude custom and/or smart groups in your combined group set.
5. Click the *Create* button.

5.8.6.2 *Editing a Combination Group*

1. Select the group that you want to edit.
2. Choose *Groups > Edit Group*.
The *Create from Groups* dialog is displayed.
3. Enter a new name for the group (optional).
4. Use AND, OR, NOT to include or exclude custom and/or smart groups in your combined group set (optional).

5.8.6.3 *Deleting a Combination Group*

1. Select the group that you want to delete.
2. Select *Groups > Delete Group* from the menu.
3. Click *Delete* to remove the combined group set from the Group panel.



5.8.7 Managing groups

5.8.7.1 Renaming groups

There are several ways to rename a custom group or a smart group:

- Right click on the group name to display a contextual menu. Select *Rename Group* and enter the new group name or
- Choose *Groups > Rename Group* in the menu or
- Click on the group name a second time to directly edit the name.

5.8.7.2 Deleting groups

When you delete a group, references are removed from the group but are not deleted; the references themselves are still part of the library. To delete a group:

- Right click on the group name to display a contextual menu. Select *Delete Group* or
- Choose *Groups > Delete Group* in the menu.

5.8.7.3 Removing References

You can remove references from any of your *Custom Groups* or *Online Search Groups*. The references will still be in your library and appear under *All References*, they just will not appear in that particular custom group.

1. Click on the name of the group.
2. In the reference list, select the references you want to delete.
3. Press the *Delete* key on your keyboard.

You can delete references from your library while you are displaying any type of group other than a custom group. When one or more references are selected, you can use the <Delete> button to remove references. This command moves the references to the *Trash* group. The Trash group is a temporary holding place. The references are no longer in your library, and cannot be cited or searched, but they have not been irrevocably thrown away yet.

Note

- When you **delete** a reference from a **smart group**, EndNote also deletes the record from the *All References* group, with no warning.
- You can create a maximum of 5000 *Custom > Smart Groups > Group Sets* in a single library.
- A reference can be added to any number of groups.
- To add references to a group you can drag and drop selected references into an existing custom group name.
- A single reference will never appear more than once in a particular group.
- As a matter of fact, a reference in a group is a shortcut. This means that if you remove a reference from a custom group it will not be deleted from the library. The shortcut has been deleted, not the reference.
- On the other hand, if you **delete** a reference from a **library**, the reference will also be deleted from all groups in the library. The reference no longer exists. You cannot delete a reference from the library while displaying a custom group. Highlight the reference, go to the *All References* view and then choose *Move References to Trash* from the *References* menu.
- The automatic *Unfiled group* includes references that do not appear in any custom groups.



- ◆ Once you move a reference to the *Trash* group, it is no longer officially in your library. However, until you choose Empty Trash you can still drag the reference from the Trash group back to your active library.

5.9 Syncing

5.9.1 Overview

EndNote allows you to synchronize the references (including file and figure attachments) in your EndNote desktop library with the references in your EndNote online library.

- ◆ **EndNote** is your desktop version of your EndNote bibliographic resource tool.
- ◆ **EndNote online** is our online version of EndNote desktop.

The Sync process automatically synchronizes both sets of references that reside in groups so that an exact match exists in both EndNote desktop and EndNote online.

The Sync process is always initiated from EndNote. The data in EndNote and EndNote online are synchronized in both applications when you run Sync. You will have identical groups and references when Sync completes processing.

The Sync process includes:

- ◆ all data changes to references (including file attachments) during the Sync process so that each library matches the other. For example, if you add or remove references and/or PDF files in EndNote, then those changes are updated in EndNote online and vice-versa.
- ◆ updates and additions to groups in both libraries. For example, if you create and add references to a new group in EndNote, then you will see this group in EndNote online the next time you run the Sync process.

You must first register and have an active EndNote online account to initiate the *Sync* process. Registration is fast and easy and activates your two-year EndNote online account. When completed, EndNote automatically proceeds with the *Sync* process and updates your new EndNote online library to match the groups in your EndNote library.

5.9.2 Preferences

If you want to display your *Sync* preferences:

1. Choose *Edit > Preferences > Sync*.
2. *Sync Preferences* allow you to set your preferences so that:
 - ◆ You only have to enter your e-mail address and password once in *Sync Preferences* and not each time you manually synchronize your references between EndNote desktop and EndNote online.
 - ◆ You can have EndNote automatically begin the Sync process every 15 minutes (background processing) by selecting the *Sync Automatically* check box.

Note

- ◆ A two-year subscription to EndNote online comes with the purchase of EndNote desktop. The free subscription allows you to create an EndNote online library with an unlimited number of references in your library and up to 5 GB (gigabytes) of data in file attachments.



- ♦ Sync works with only one library and only one EndNote online account (the library which is displayed in *Edit > Preferences > Sync*).
- ♦ Syncing with EndNote online includes groups but does not include *Group Sets*, *Smart groups* and *Combination groups*. These will be added in a later release. In the meantime you can use an EndNote plugin to Import or Export Smart Groups between computers.
See EndNote FAQ 6 <https://researchsoftware.com/faq/endnote>
- ♦ After the Sync process completes, EndNote identifies each group that has *Sharing enabled* in EndNote online with a shared group icon. A shared group is a group in which your colleagues can access and see them in their *Groups Shared by Others* section.
- ♦ Sync will put groups, when a group set cannot be identified, in an *Unfiled Groups* set. Drag and drop the group to the appropriate group set in the desktop library.

5.10 Sharing

There are many ways to share an EndNote Library or 'Groups':

- ♦ Network Sharing
- ♦ Sharing a local library
- ♦ Sharing Groups

The procedure is described below.

<https://researchsoftware.com/endnote-desktop-online-and-ipadr-sharing-libraries>

5.10.1 Sharing a library in a network

EndNote is a multi-read application (and not a multi-read-write application). This means that, if we are talking about one specific library (database), this library can only be opened by one person at the same time in the write-mode. The other users can not open this specific library at that same moment.

In read mode several users can read from the library at the same time. In read-mode about 99% of the functionality can be used (except for writing/entering references, removing and changing term manager lists etcetera).

The simplest way to set up an EndNote library for shared network access is to use the network's system of file permissions to control the type of access allowed for users and groups. Except for the person who posts the database, grant all users read-only access. One person should be granted full access for maintaining and updating the library at a separate location. Then, periodically post the updated library on the network for all other users, with read-only access.

Recommendations for shared EndNote libraries

<https://researchsoftware.com/sharing-endnote-libraries>

<https://researchsoftware.com/faq/endnote#nid-283>

5.10.2 Sharing a local library

A local library can be shared with other EndNote users.

- ♦ A library can be shared with up to 100 EndNote users (yourself included), no matter where they are located.
- ♦ Everyone sharing your library has editing rights and read-write access to the entire library at the same time, i.e.: references, attachments, PDF annotations, group sets and groups.



- ◆ All EndNote X8 users can store file attachments without limit in their library.
- ◆ There is no limit on the size of the shared library.
- ◆ Sharing a library means that all users have an EndNote online account, linked with EndNote X8 or EndNote X7.2.
- ◆ The *Activity Feed* button (only available in EndNote X8) views the activity of the recent changes your collaborators are making in the shared library (to 500 lines of activity, most recent items on the top).

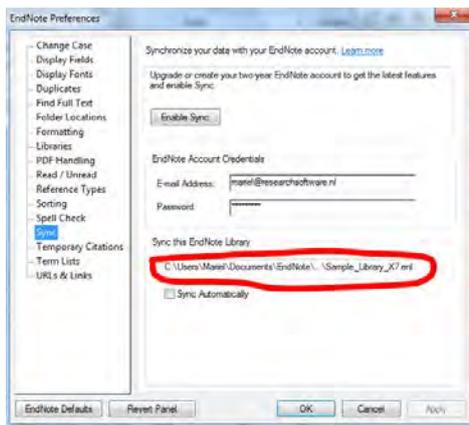
Sharing a library means:

- ◆ The **initiator sends** an invitation to share a library.
- ◆ The **recipient accepts** the invitation to share a library.
- ◆ The **recipient opens** the library.

5.10.2.1 Sending an invitation

Following steps are important if you want to share your library. Proceed as follows:

1. *Open* the library you want to share.
Pay attention: the library you want to share should be the same as the library that appears in the dialog *Preferences > Edit > Sync*.

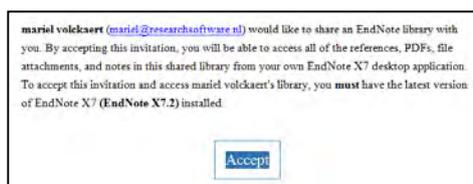


2. Choose *File > Share* or click the  *Share* button.
3. Enter the e-mail addresses of the people with whom you'd like to invite.
4. Click the *Invite* button.

5.10.2.2 Accept invitation

Pay attention: before accepting, it is important that the recipient has an EndNote online account, linked to an EndNote X8 desktop version. The recipient receives a mail with an *Invitation to share an EndNote library*. The recipient accepts the invitation as follows:

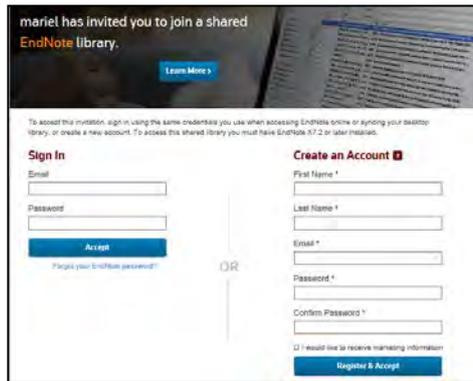
1. The recipient clicks the *Accept* button.



2. A webpage is displayed. The recipient can log in with his/her same user-id and password as in EndNote online. If the recipient does not have an EndNote account,



he/she can create a new account in the same window.



3. After signing in, a message is displayed saying that the library is shared and can be opened in EndNote X8.

5.10.2.3 Opening shared library

Open the shared library with *File > Open Shared Library*. The people who share the library have Read-Write access to the entire library. Any change in the references, attachments, PDF annotations, group sets and groups will be synchronized.

More info see: <http://endnote.com/product-details/library-sharing>

Note

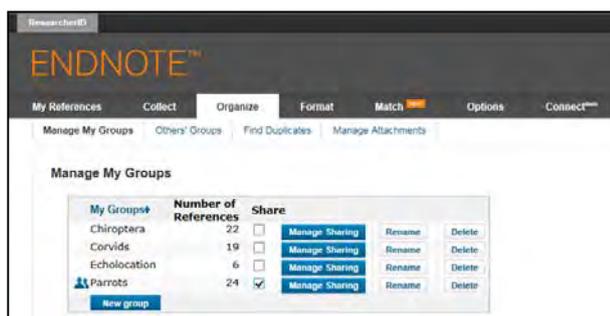
- If you are the one who shared the library, you have access to this library on your desktop, online, or on your iPad..
- If you have been invited to access someone else's library, you can only access this library from your desktop.
- With the *Activity Feed*  button you can view the activity of the changes your collaborators are making. Each Shared Library in X8 comes with an *Activity Feed*, both the library you are sharing with others, and those libraries that others have shared with you. The *Activity Feed* is attached to the associated Shared Library window. You can click on the Activity Feed icon to display it, scroll through the updates listed and click outside the feed to dismiss it.

5.10.3 Sharing online groups

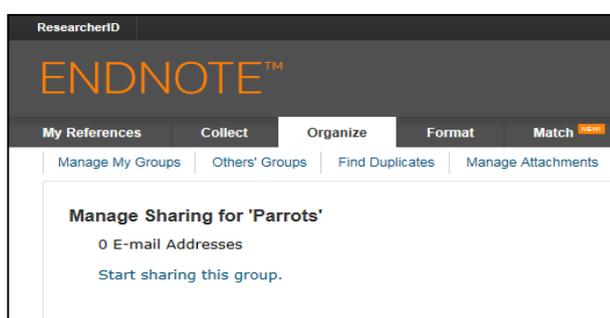
You can share groups in your online library. It is important to know, that attachments **cannot** be shared. Groups that you are sharing with others display the *Share* icon. To share a group:

1. Go to EndNote Online and log in.
<https://www.myendnoteweb.com>
2. Click the *Organize* tab.
3. Click the *Manage My Groups* link under the *Organize* tab.





4. Check the *Share* box of the group you want to share.
5. Click the blue *Manage Sharing* button next to the group you'd like to share.
6. Click the *Start sharing this group* link displayed in the window below.



7. Enter the e-mail addresses of the people with whom you'd like to share.
 - Select *Read only* or *Read & Write*.
 - Click the blue *Apply* button.
 - Click the *Close window* link.

Note

- ◆ You can share groups with online users from any institution/company.
- ◆ You can share groups with persons who have not an EndNote online account. Once these persons have registered and logged in, groups will automatically be displayed.
- ◆ Within the same group you can choose whether to give your colleagues *Read-only* access, or *Read & Write* access.
 - ◆ *Read & Write* access allows the users to add, change, or remove references in the group, as well as anything *Read-only* access allows. They cannot delete references from the owner's library.
 - ◆ *Read-only* access allows designated users to view references, use them in Word documents, or copy them to their own library.
- ◆ If several persons edit the same reference at the same time, the final edit is done by the person who saved last.
- ◆ References in shared groups can not be searched.
- ◆ References in shared groups can not be copied to the *Quick List*.
- ◆ Shared groups can be used to generate a bibliography or to export.
- ◆ File attachments cannot be shared in a group.
- ◆ You can find more info about *Sharing Groups* in the EndNote Online Help http://www.myendnoteweb.com/help/en_us/ENW/help.htm



5.11 Printing

To print a list of references, there are different ways to proceed:

- ♦ You can print a list of references directly **from EndNote File menu**.
- ♦ You can print a **Subject Bibliography**.
- ♦ You can **instantly transfer and print** a bibliography to a **Word document** using one of these methods:
 - ♦ Choose *Edit > Copy Formatted* to copy references from a library and paste them into a Word processing document. See chapter *5.11.3 Printing in Word using the Copy Formatted*.
 - ♦ You can drag a bibliography from an EndNote Library window directly in a Word paper.
 - ♦ Using Cite While You Write you can generate a bibliography based on citations in your Word document. See chapter *10 Cite While You Write*.

Important points when printing

- ♦ If a library window is displayed, you can print either the **selected** (highlighted) references or **all** references showing in the list.
- ♦ If an individual reference is open for viewing, EndNote prints only that specific reference as displayed on the screen with field labels. No output style is applied.
- ♦ **Selected** references are printed in the order they are sorted. The *Sort References* command unselects any selected references, so use the *Show Selected References* command if necessary before sorting to retain the subset of references you selected.
- ♦ References will be printed in the order specified by the selected output style. If you want to change the sort order, you must modify the output style. If you want to export references in the order in which they are listed in the current Library window, change the output style's sort order setting to Order of appearance.
- ♦ The font and size of the printed references are determined by the *General Display Font*, if that font is a True Type font; otherwise a font substitution will be made. Choose *Edit > Preferences > Display Fonts* to change the font and size if necessary. The double "T" to the left of the font name indicates a True Type font.

5.11.1 Printing from EndNote File menu

Printing a list of references **directly from EndNote** results in an independent bibliography. EndNote does not generate the bibliography based on citations found in a paper - instead, the bibliography is generated independently of a paper.

In this example we are going to print an alphabetical list of references containing the keyword **'parrot'** (see Search tab).

1. Select *All References* in the Groups panel.
2. Click the *Search* tab or
Press <Ctrl+F>.



3. Select the field **Keywords**.
Select the parameter **Contains**.
Enter **parrot**.
Click the *Search* button.

The screenshot shows a library software interface. On the left is a 'My Library' sidebar with categories like 'All References (59)', 'Search Results (17)', 'Avian Intelligence', 'Bats', 'My Groups', and 'Online Search'. A red arrow points to the 'Search Results' category. The main window has a search bar with 'parrot' entered. Below the search bar is a table of search results with columns: Rec., Year, URL, Author, Title, and Journal. The results list various papers about parrots, including 'Grey parrots use inferential reasoning' and 'Symbolic communication in the grey parrot'.

Rec...	Year	URL	Author	Title	Journal
2304	2012	ht...	Schloegl, C.; Schmid...	Grey parrots use inferential reaso...	Proc. R. So...
2336	2012	ht...	Pepperberg, Irene M.	Symbolic communication in the g...	The Oxfor...
2311	2011		Smirnova, A. A.	Use of numerical symbols by birds	Zoologich...
2309	2011	ht...	Smirnova, A. A.	On the capability of birds for sym...	Biology Bu...
2312	2011	ht...	Peron, F.; Rat-Fische...	Cooperative problem solving in A...	Animal Co...
2313	2011		Pepperberg, I. M.	Avian cognition and social intera...	Interactio...
2315	2010	ht...	Vick, S. J.; Bovet, D.; ...	How do African grey parrots (Psit...	Animal Co...
2317	2009		Salwiczek, L. H.; Em...	The development of caching and ...	Journal of ...
2299	2009	ht...	Pepperberg, Irene M.	Alex & me: How a scientist and a ...	
2324	2007		Emery, N. J.; Seed, A...	Cognitive adaptations of social b...	Philosophi...
2325	2006		Pepperberg, I. M.	Cognitive and communicative abi...	Applied A...
2284	2006		Pepperberg, I. M.	Grey parrot (Psittacus erithacus) ...	Journal of ...
2285	2006		Emery, N. J.	Cognitive ornithology: The evolut...	Philosophi...
2328	2004		Pepperberg, I. M.	Cognitive and communicative ca...	Animal W...
2332	2001		Pepperberg, I. M.	In search of King Solomon's ring: ...	21st Annu...
2329	1999	ht...	Pepperberg, I. M.	Rethinking syntax: A commentary...	Animal Le...
2298	1999		Pepperberg, Irene M.	The Alex studies: Cognitive and c...	

4. The search results are displayed in the *Search Results* Groups pane.
Use the style menu on the Main toolbar to choose a style.
Choose *References > Sort References* to sort the references or
Click the columnheader.
Select the references you want to print.
5. Choose *File > Print* or press <Ctrl+P>.
The *Print* dialog appears.
Select the options.
6. Click *OK*.

Note

- The bibliography can also be saved as a file.
In the *Print* dialog you can check the *Print to File* box.
In the *Print to File* dialog you enter the name of the file.
Click the *Save* button.
- Each printed page has 1-inch margins, left-justified text, and a header that displays the library name in the upper left corner and the page number in the upper right corner. There are no options to customize the margins, headers or footers of the printouts. Use one of the other options for creating an independent bibliography if you need to modify these aspects of your printout.



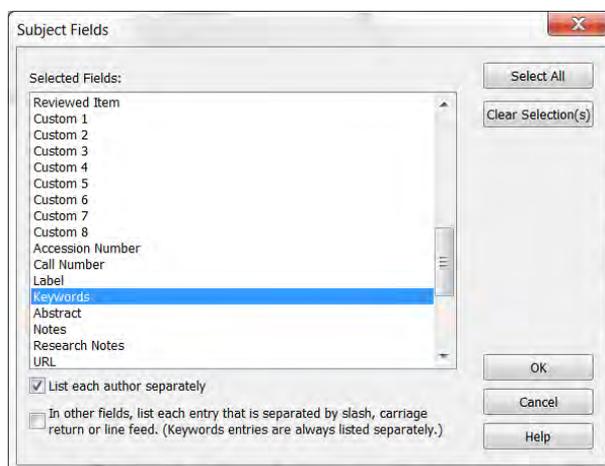
5.11.2 Printing a Subject Bibliography

A *general bibliography* is a continuous listing of citations in a particular order. A *Subject Bibliography* is an independent bibliography made up of smaller listings, each appearing under a separate and distinct heading. A subject bibliography can be based on any field or combination of fields. Subject bibliographies have diverse uses, including: generating lists of journal abstracts; current awareness lists; subject indexes or lists of holdings by category. Typical subject bibliography headings are by *Author, Keyword, Journal Name* etc.

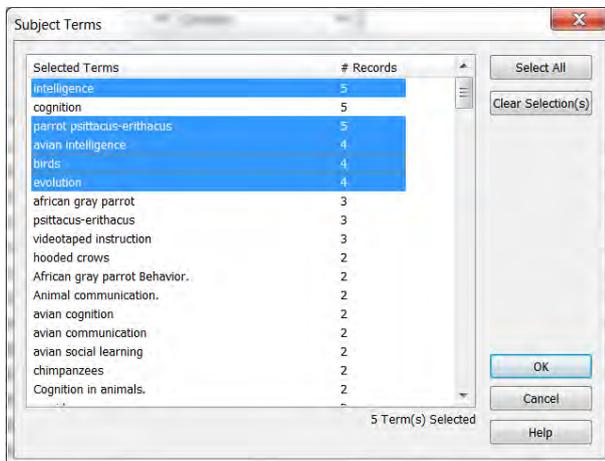
5.11.2.1 Creating a Subject Bibliography

In this example we print a subject bibliography of keywords. For this purpose we use the *Sample_Library.enl*.

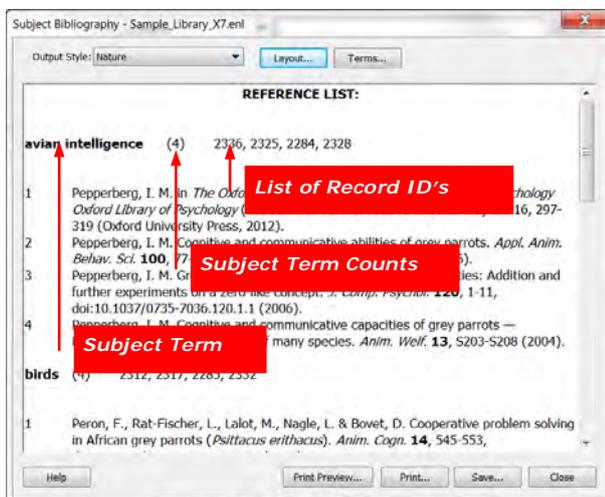
1. In the current Library window, show only the references you wish to use to make a subject bibliography. There are several ways to do this:
 - ◆ Right-click in the list and select *Show All References* in the context sensitive menu or
 - ◆ Click on a Group name to display only the references in a specific group or
 - ◆ Choose *Tools > Search Library* to find a subset of references or
 - ◆ Highlight individual references and then use the *Show Selected References* command to list those references for the subject bibliography.
2. Click in the reference list to make it the active panel.
3. Choose *Tools > Subject Bibliography*
4. The *Subject Fields* dialog is displayed.
Highlight the field **Keywords** whose content you wish to use as subject headings.
Click *OK*.



- The *Subject Terms* window is displayed.
Select the terms you wish to include as subject headings.
Click *OK*.



- Once your subject bibliography is set up the way you want it, you can view, print, save or dismiss the list.
 - Click *Layout* if you want to modify options that affect the subject headings;
 - Click *Terms* if you want to modify the term selections you just set;
 - Click *Print Preview* to see a formatted page view of the bibliography;
 - Click *Print* to print to a printer;
 - Click *Save* to print to a disk file (Text, RTF or HTML);



- Click *OK*.



Result (Preview)

REFERENCE LIST:

Cretaceous (10)

1. Morehouse, S. I. & Tung, R. S. Statistical evidence for early extinction of reptiles due to the KT event. *Journal of Paleontology* **17**, 198-209 (1993).
2. Matthews, E. D. A look at 'cold' as a possible cause of major Cretaceous extinctions. *Journal of Paleontology* **14**, 766-788 (1993).
3. Wolfe, J. A. Palaeobotanical evidence for a marked temperature increase following the Cretaceous/Tertiary boundary. *Nature* **343**, 153-156 (1990).
4. Prinn, R. G. & Fealey, B. F. Bolide impacts, acid rain, and biospheric traumas at the Cretaceous-Tertiary boundary. *Earth and Planetary Science Letters* **83**, 1-15 (1987).
5. Pollastro, R. M. & Pillmore, C. L. Mineralogy and petrology of the Cretaceous-Tertiary boundary clay bed and adjacent clay-rich rocks, Raton Basin, New Mexico and Colorado. *Journal of Sedimentary Petrology* **57**, 456-466 (1987).
6. Officer, C. B. & Drake, C. L. Cretaceous/Tertiary extinctions: We know the answer, but what is the question? *Eos* **70**, 659-660 (1989).
7. Montanari, A. Spherules from the Cretaceous/Tertiary boundary clay at Gubbio, Italy: The problem of outcrop contamination. *Geology* **11**, 668-671 (1983).
8. Melosh, H. J., Schneider, N. M., Zahnle, K. J. & Latham, D. Ignition of global wildfires at the Cretaceous/Tertiary boundary. *Nature* **343** (1990).
9. Matoran, S. A miscellaneous Ostracod group from the mid-Cretaceous of the south shelf of the Tethys Sea - Comments. *Journal of African Earth Sciences And The Middle East* **8**, 40-42 (1988).
10. Dutton, S. P. & Land, L. S. Cementation and burial history of a low-permeability Quartzarenite, lower Cretaceous Travis Peak formation, East Texas. *Geological Society Of America Bulletin* **100**, 1271 (2000).

dinosaurs (6)

1. Billoski, T. V. Debate II. *Science* **77**, 5-6 (1993).
2. Schwartz, M. T. & Billoski, T. V. In *Extinction* (eds. Jones, B. T. & Smith, N. V.) 175-189 (Barnes and Ellis, New York, 1990).
3. Matthews, E. D. A look at 'cold' as a possible cause of major Cretaceous extinctions. *Journal of Paleontology* **14**, 766-788 (1993).
4. Whiting, J. R., Billoski, T. V. & Jones, V. R. Herding instincts of cretaceous duck-billed dinosaurs. *Journal of Paleontology* **75**, 112-132 (1987).
5. Paul, G. S. Physiological, migratorial, climatological, geophysical, survival, and evolutionary implications of cretaceous polar dinosaurs. *Journal of Paleontology* **62**, 640 (1998).
6. Bowstein, B. S. Micro-mammal prototypes in dinosaurs: a new discovery. *Paleontology* **12**, 74-78 (1984).

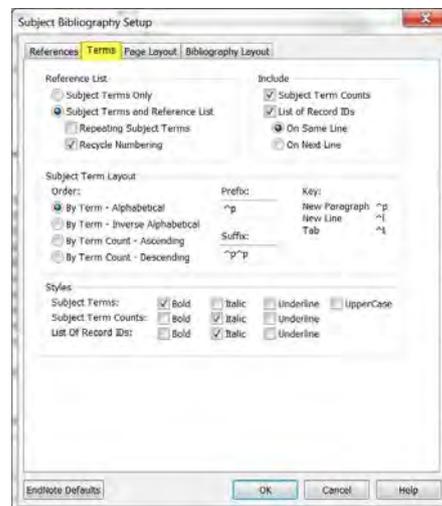
excavation (5)

1. Argus, M. V. New paleontological excavation techniques. *Journal of Paleontology* **19**, 234-237 (1993).
2. Billoski, T. V. *Introduction to Paleontology* (Institutional Press, New York, 1992).
3. Billoski, T. V. Debate II. *Science* **77**, 5-6 (1993).
4. Matthews, E. D. A look at 'cold' as a possible cause of major Cretaceous extinctions. *Journal of Paleontology* **14**, 766-788 (1993).
5. Argus, M. V. & Matthews, E. K. Stratigraphic excavation techniques for paleontologists. *Journal of Paleontology* **17**, 119-127 (1991).

5.11.2.2 Subject Bibliography Layout

If you want to modify options that affect the subject headings, proceed as follows:

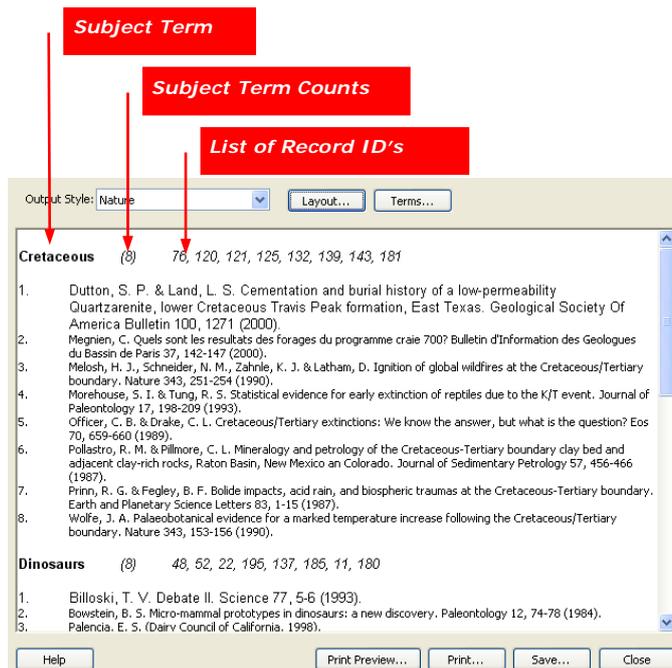
1. Click the *Close* button to leave the *Print Preview*.
The *Subject Bibliography* dialog is displayed again.
2. Click the *Layout* button.
The *Subject Bibliography Setup* window is displayed.
3. Choose the settings on the *References* tab (Style, Title, Sort Order).
Choose the settings on the *Terms* tab to set the options for the subject headings.



4. Click *OK*.

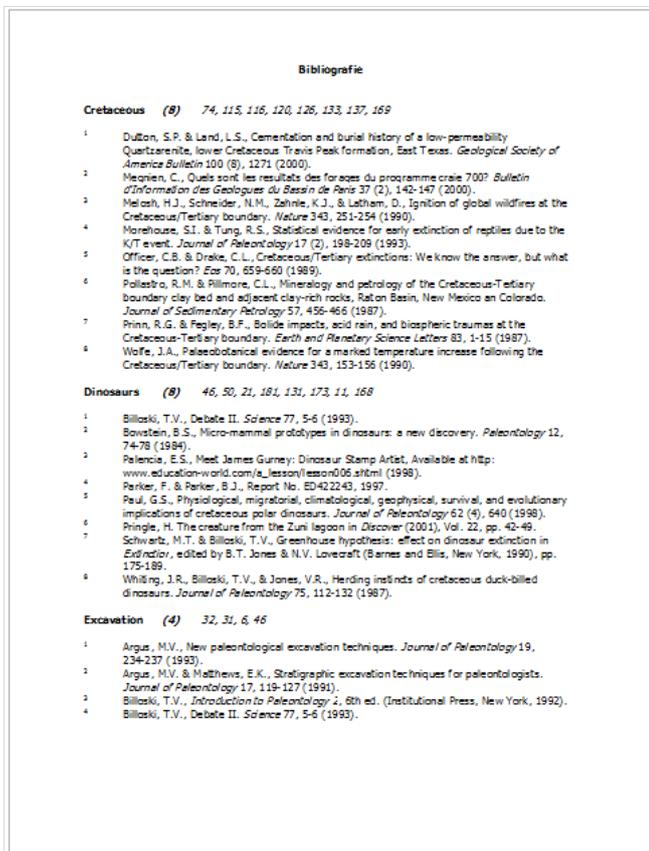


5. The result is viewed below.



6. Instead of clicking on the *Print* button click on the *Save* button. The Subject Bibliography is saved as a rtf file.

Result (after opening the rtf file in Word)



5.11.3 **Printing in Word using the Copy Formatted command**

Use the *Copy Formatted* command to quickly create and copy a bibliography that you can paste into a word processing document, WordPad or WordPerfect document. The references are sorted and formatted according to the rules of the selected style.

The font used for the *Copy Formatted* command is the 'General Display Font' which can be changed by choosing *Preferences > Display Fonts*, and choosing a new font and size under the 'General Display Font' heading. All text style information (such as bold and italic) is retained if you paste into a program that recognizes RTF (Rich Text Format) or styled text.

To copy formatted references from EndNote and paste them into a word processing document:

1. Open the EndNote library and select the references you want to copy.
2. Select the necessary style in the *Styles* box.
3. Choose *Edit > Copy Formatted* or press (Ctrl+K).
4. Open a word document and put the cursor where you would like the references to appear.
5. Choose *Edit > Paste* or press <Ctrl+V>.



6 Editing references

6.1 Editing one reference

Editing or modifying a reference can be done:

- ♦ in the *Edit* window
- ♦ In the *Reference panel*

6.1.1 Edit Window

1. Double click the reference(s) to be edited or
Select the reference(s) and choose *References > Edit References*.
2. The *Reference Edit* window appears.
3. Make modifications in the *Edit* window.

Use the *Previous Reference* and *Next Reference*  commands to quickly browse and edit the previous or next reference.

4. Click the *Close* button.

Modifications are saved automatically.

6.1.2 Reference Panel

When you select the *Reference panel* from the EndNote window you can edit the contents of the highlighted reference. Most functionality is the same as working in the *Edit window*.

Enter text in a field by clicking on the field. All edit commands are available via the menus including context-sensitive menus. Right-click in the reference to display common options such as *Cut*, *Copy*, and *Paste*.

6.2 Editing multiple references

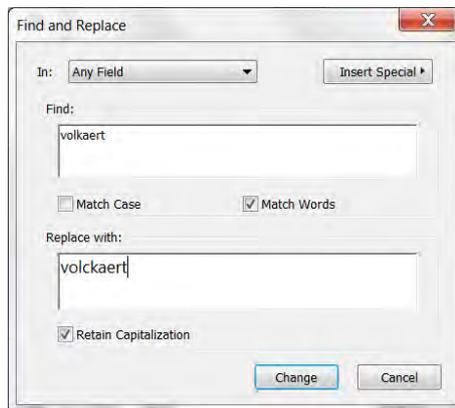
Global editing commands make it easy to edit multiple references simultaneously and keep your reference data consistent. Two commands do the job for you: *Find and Replace* and *Change > Move > Copy Fields*.

6.2.1 Find and Replace

The *Edit > Find and Replace* command searches for text in your library, and either deletes that text or replaces it with other text that you specify. Changes can be restricted to a particular field in your references, and you can also apply *Match Case* and *Match Words* restrictions. The *Find and Replace* command applies only to the references showing in the Library window.

1. Choose *Edit > Find and Replace*.
2. The *Find and Replace* dialog appears. Select the options:
 - In the *In* list select the field to be searched.
 - In the *Find* box type the text to be changed.
 - Change the *Match Case* or *Match Words* settings if necessary.
 - In the *Replace with* box type the text that should replace the original text.
 - Use the *Insert Special* button to enter a *Tab* or *Carriage return*.
 - Click the *Change* button to search the specified text and replace it with the new

text.



3. Click *OK* if all of those items are correct. EndNote replaces the text and displays the number of references that were changed.

 **Note**

- The *Find and Replace* command applies only to the references showing in the Library window.
- If you leave the *Replace with* box empty, the search term will be deleted.
- The *Undo* command cannot be used to undo the results of the *Find and Replace* command. Make sure you have a backup before making changes.
- When using *Find and Replace* the new text adopts the text style of the first character of the text being replaced. For example, if you replace an italicized word, the new text will also be italicized.

6.2.2 Change/Move/Copy Fields

6.2.2.1 Change Fields

The *Change Fields* command modifies any field in your library by either inserting text at the beginning or end of the field, replacing all contents of the field with different text, or deleting the contents of the field.

EXAMPLE 1 - Add data in the *Research Notes* field.

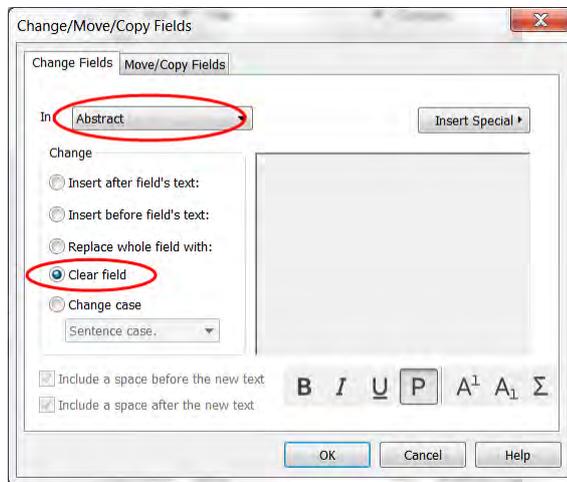
1. Choose *Tools > Change and Move Fields*.
2. The *Change and Move Fields* dialog appears; select following options:
 - Choose *Research Notes* from the *In* box.
 - Select *Insert after field's text*.
 - Click the *Insert Special* button to enter a *Carriage return*.
 - In the text box, enter the text that should be added to the field.
3. Click *OK*.
4. Click *OK* again to confirm.

EXAMPLE 2 -Clear the content of the *Abstract* field.

1. Choose *Show All References* in the *Groups* pane.
2. Choose *Tools > Change and Move Fields*.
3. The *Change and Move Fields* dialog is displayed.



4. In the *Change Fields* tab you select following options:
 - Choose *Abstract* from the *In* list.
 - Select *Clear field*



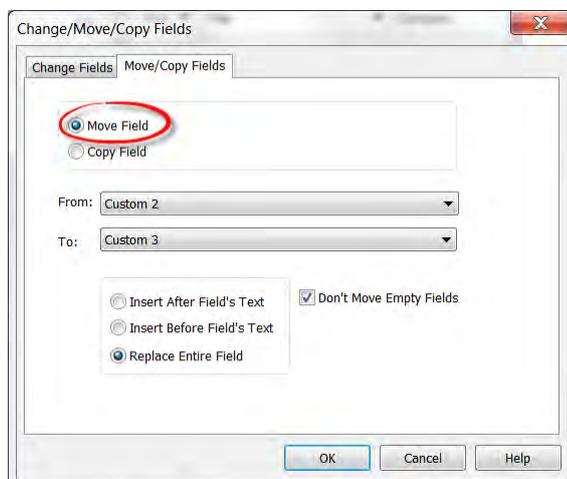
5. Click *OK*.
6. Click *OK* to confirm.

6.2.2.2 *Move/Copy Fields*

Use the *Move Fields* tab to move the entire contents of one field to another field within a reference. The command applies to all of the references that are 'showing' in the Library window.

1. Determine which references you want to modify. Make sure only those references are shown in the Library window.
2. Choose *Tools > Change > Move/Copy Fields*.
3. The *Change and Move Fields* dialog appears. Click the *Move Fields* tab.

In the *From* box select the field you want to move the data from. In the *To* box select the field where you want the data to end up. Choose one of the three options.



4. Click *OK*.
5. Click *OK* to confirm.



 **Note**

- You have the option of **Inserting** the moved text **After** or **Before** the data in the destination field, or **Replacing** the entire contents of the destination field. In the latter case, you have the additional option of whether or not to **Move Empty Fields**. If you uncheck the option *Don't move empty fields* then any reference with an empty originating field deletes the contents of the corresponding destination field (and thereby making it empty as well). If this option is turned on, the contents of the destination field will *not* be deleted if the originating field is empty.
- In EndNote X7v4 and X8 you can copy the *Record Number* field to another field.

6.3 Deleting References

To delete references select them and choose one of the following commands:

- *References > Move References to Trash* or *<Ctrl+D>*
- *Edit > Cut* or *<Ctrl+X>*
- *Edit > Clear*
- Drag the selected references and drop them on the *Trash* group.

 **Note**

- If you delete a reference of a **custom group**, it will be removed only from that group but still exist in the library.
- When you delete a reference, you delete its record number in that library forever.
- You cannot undo the *Empty Trash* command, so be sure you want to delete the reference(s) in *Trash* before dismissing the EndNote warning.
- We strongly recommend that you do not delete references that have been used in papers that you might want to reformat later.
- Keep backups of your libraries!

6.4 Merging libraries

There are three ways to merge libraries:

- Import one library into another (*File > Import*)
- Copy references from one library to another (*Edit > Copy* and *Edit > Paste*)
- Drag-and-drop

6.4.1 File/Import

See chapter 4.4 *Importing text files*.

6.4.2 Edit/Paste

You can also use the *Copy* and *Paste* commands to transfer references.



1. Open the source library.
2. Select the references you want to copy to the target database.
3. Choose *Edit > Copy* or press <Ctrl+C> to copy all references.
4. Open the library to which you want to add the references.
5. Choose *Edit > Paste* or press <Ctrl+V> to paste the references in the Library.

6.4.3 Drag and Drop

To copy specific references from one library to another,

1. Select the references in one library:
 - hold down the Ctrl key to select non-consecutive references
 - use the Shift key to select a range.
2. Click on any part of the selection and use the mouse to drag the selection to another library. The selected references are copied to the library where they were dropped.

Note

- ♦ Any time you add references to a library, the newly added references are assigned new record numbers in the order that they are added to the library.
- ♦ Before merging libraries, it is a good idea to make a backup copy of the library into which you are transferring references.

6.5 Term List

6.5.1 Definition

EndNote's term lists are used to store terms such as keywords, author names, or journal names. You can use these stored terms when entering references to improve consistency and accuracy of information in your library. You can also use the Journals term list to store abbreviated journal names that EndNote can substitute for the full journal name in a bibliography.

- ♦ Term lists are stored with the library and therefore are specific to only that library.
- ♦ By default each EndNote Library has three *Term Lists* linked with the fields: *Authors*, *Journals* and *Keywords*. EndNote updates the term lists automatically so that the *Authors*, *Journals* and *Keywords* lists include all of the *author* names, *journal* names and *keywords* entered into your references.
- ♦ Terms lists can be used with the **Auto-entry** feature on or off. By default, this option is turned on so that EndNote will suggest the closest matching term as you type in a reference.
- ♦ If you enter references manually, you may find it helpful to create **new term lists** (up to 31 term lists) for fields like *Publisher* and *Author Address* names.
- ♦ There is no limit to the number of terms in a term list.
- ♦ Term lists can be **linked** to specific fields so that EndNote associates the correct term list with the field you are editing.
- ♦ Term lists can be **exported** and **imported**.
- ♦ By default, term lists are **automatically updated** from the terms entered in your references. New terms appear in red text in the Reference window. This functionality may be turned off using EndNote's Preferences.
- ♦ A library must be open before you can edit its term lists.
- ♦ One term can be up to **253 characters** long.



- The Journals term list stores various forms of journal names that can be used when creating bibliographies. EndNote provides several Journals lists (Humanities, Medical, and Chemistry) that can be imported for use with your EndNote libraries.
- Choose *Tools > Open Term Lists* to add, edit or delete terms.

6.5.2 Using Term Lists

6.5.2.1 Inserting terms using the Suggestion feature

If you are entering text into a field that is linked to a term list, EndNote finds the first matching term in the list and suggests that as the term you want to enter. The suggested text appears highlighted after the cursor. Continue typing until EndNote suggests the correct term, and then press Enter or Tab to accept it.

When EndNote suggests a term, you can use the Up or Down arrows on your keyboard to have the suggested text change to the previous or next possible matching term in the term list.

When you enter a term that is not already in the term list, it appears in red to indicate that it is a new term. When you close or save the reference, that term is added to the term list and will no longer display in red.

In the example below we make a new reference entering the author name **Alvarez**.

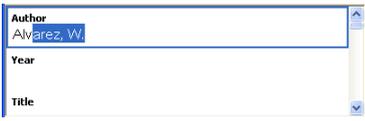
1. Click the  *New Reference* button or Choose *References > New Reference* or Press <Ctrl+N> to make a new reference.
2. Type **A**; EndNote suggests **Aaronson**



3. Type **L**; EndNote suggests **Allen**



4. Type **V**; EndNote suggests **Alvarez**.



5. Press <Enter> when the name **Alvarez** appears. Press <Enter> again to enter a new Author name or Press <Tab> to go to the next field. The window is viewed below:




6.5.2.2 Inserting terms manually

By default the *Suggest Terms as you type* option is turned on (*Edit > Preferences > Term Lists*). If you have turned off the option to suggest terms as you type, you can still insert terms into your references manually. To insert a term from a Term List window:

1. Open a reference and position the insertion point where you want to add the term.
2. Choose *Tools > Open Term Lists* and select the desired list or Press <Ctrl+4> to activate the *Term Lists* dialog.
3. Choose one of these methods to insert a term:
 - Double-click a term to insert it directly into the reference or
 - Select one or multiple terms and click the *Insert Term* button
4. The terms are listed in the reference one per line in alphabetical order.

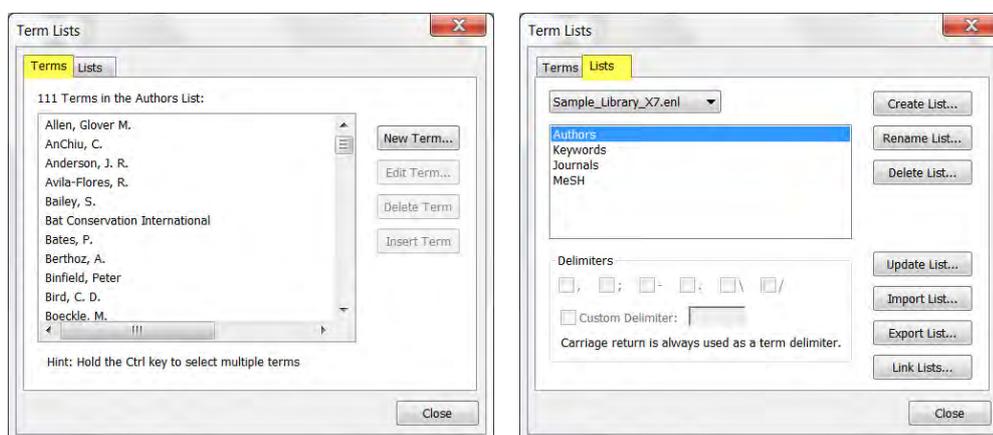
6.5.3 Editing Term Lists

Any term in a term list may be modified or deleted without affecting any of the references in the library or any links between term lists and fields.

6.5.3.1 Editing the Authors Term List

To edit a term in a the Author's list:

1. Choose *Tools > Open Term Lists* and select the list that contains the term to be modified (*Authors*) or Choose <Ctrl+4>.
2. The *Term Lists* dialog appears.
In the *Terms* tab author names are listed alphabetically.
In the *Lists* tab the term lists are viewed (*Authors, Journals, Keywords*).



Tab Terms

In the *Terms* tab following options can be chosen:

- ♦ *New Term*: use this button to add new terms to the list.
- ♦ *Edit Term*: use this button to edit selected terms.
- ♦ *Delete Term*: use this button to delete the selected terms.
- ♦ *Insert term*: use this button to insert selected terms directly in the field of an opened reference.



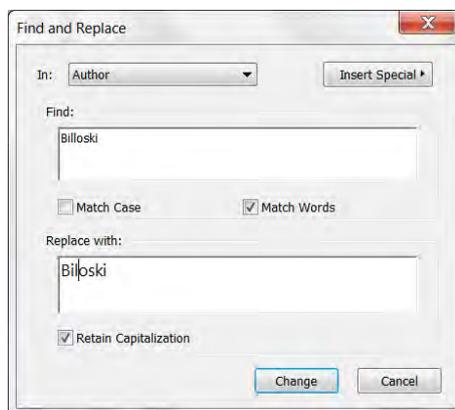
Tab Lists

In the *Lists* tab following options can be chosen:

- ♦ *Create List*: use this button to create a new term list.
- ♦ *Rename List*: use this button to modify the name of the highlighted term list. Term lists can be renamed without disturbing their links to reference fields or the terms within them.
- ♦ *Delete List*: use this button to delete the highlighted term list.
- ♦ *Update List*: use this button to update the highlighted term list with terms from the linked field(s) in the current library. This is useful if you have turned off the preference to automatically update your term lists, or if you have received a library from a colleague without a term list, or if you have deleted a term list and wish to recreate it.
- ♦ *Import List*: use this button to import an existing list of terms from a text file into the highlighted list.
- ♦ *Export List*: use this button to export terms from the highlighted list to a text file. This text file can be imported in other libraries or can be opened in Word.
- ♦ *Link Lists*: use this button to link the term list with one or multiple fields. See chapter 6.5.6 *Link*.

In the example below we change the name **Billoski** into **Biloski**:

1. Open – if necessary – the *Sample_Library*.
2. Right-click in the library and select *Show All References*.
3. Choose *Edit > Find and Replace*.
4. In the *In* box you select *Author*.
In the *Find* box you type **Billoski**.
In the *Replace with* you type **Biloski**.



5. Click the *Change* button.
6. Click *OK* twice.
7. In the library list the name is viewed correctly.
8. Choose *Tools > Open Term Lists > Authors Term List*.
9. In the *Terms* tab you type **Bil**.
In the Term list the two names are still displayed.
Select the wrong spelled name **Billoski**.
Click the *Delete Term* button to remove the name from the list.
10. Click *Close*.

6.5.3.2 Editing the Journal Term List

For EndNote to accurately use the abbreviated journal names in your bibliographies, it is important to be consistent when entering different formats of a journal name. The



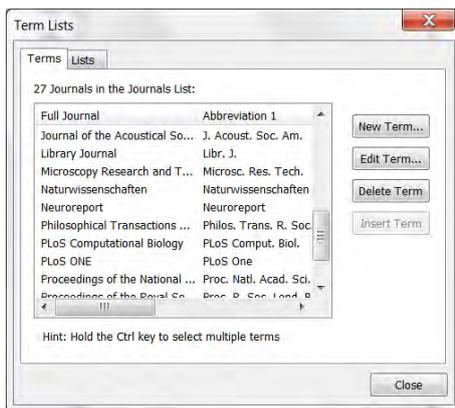
first column should always list the full journal name, and subsequent columns should store consistent formats of abbreviated names.

Journal lists are updated automatically, from the *Journal Article* and *Electronic Article* reference types, unless you have turned off the preferences to update lists. When journal lists are updated, the entry in the main *Journal* field goes into the first column of the list (*Full Journal*) and the journal entered into the *Alternate Journal* field goes into the second column (*Abbreviation 1*). Be consistent when entering data into these fields so that the Journals term list will be updated correctly. Note that if the name entered into the Journal field exists in any of the columns of the Journals term list, it is not added again. EndNote tries to avoid duplicate entries in the Journals list.

If you have turned off the preference to automatically update the term lists, you may manually update the lists as described below. When you are manually updating Journal lists, you can choose which columns in the list are used for which fields of data.

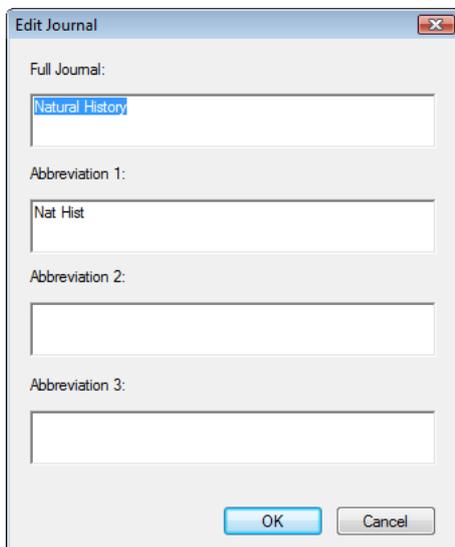
Let's have a look at the journal term list:

1. Open a library.
2. Choose *Tools > Open Term Lists* and select *Journals Term List*.
3. In the *Terms* tab an alphabetical list of journal names is displayed.



4. Select a term in the list.
5. Click the *Edit Term* button.

In the *Edit Journal* dialog, you can use the abbreviation sections to enter variations of the same journal name together in one term.



 **Note**

- You can load one of the supplied journal title lists to use for data entry. These lists also contain journal abbreviations for alternate output, and are used by certain output styles. The lists supplied in the EndNote Term Lists folder are: *Anthropology.txt*, *Astronomy and Astrophysics.txt*, *BioScience.txt*, *Chemical.txt*, *Economics.txt*, *Humanities.txt*, *Korean Medical Terms.txt*, *Law.txt*, *Medica.txt*, *Philosophy.txt*, *Religion.txt* and *Zoological Records.txt*. The lists are located in *C:\Program Files\EndNoteX8\Term Lists*.
- When you insert a journal name from the Journals term list into a reference, only the first term for the journal name is entered. However, you can create a bibliography that uses any abbreviation in the term list by editing the style used to format the paper.
- Editing a term in a term list does not change all occurrences of that term in your library. Use the *Find and Replace* command from the *Edit* menu to find the old term in your references and replace it with the new one.

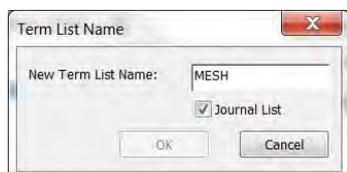
6.5.4 **Creating a new Term List**

In the following example you are creating a new list into you are going to import the biomedical thesaurus (MeSH).

1. Open the library in which you want to create a new list.
2. Choose *Tools > Define Term Lists* and select *Journals*.
3. Click the *Create List* button.

In the *Term List Name* dialog enter the name of the new list (**MeSH**).

Click *OK*.



 **Note**

Download the MeSH terms <https://researchsoftware.com/downloads/terms-lists>

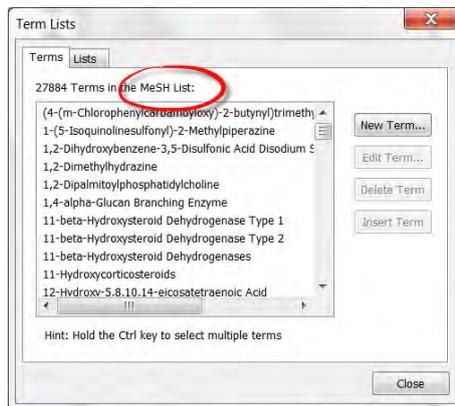
6.5.5 **Importing Terms into Term Lists**

In this exercise you are going to import the biomedical thesaurus with MeSH terms into the Term List that you made in the previous exercise.

1. Open the library into which you want to import the term list. (We suggest to try this in a test database).
2. Choose *Tools > Define Term Lists*.
3. Select the new empty *Term List* you made in the previous exercise .
4. Click the *Import List* button.
5. In the *Open* dialog select the **mesh.txt** file to be imported. Click the *Open* button.
6. Click *OK*.



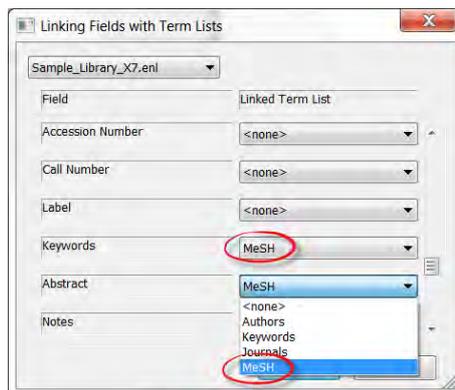
- Click the *Terms* tab.



6.5.6 Linking Term List

In the following example we link the new MeSH term list to different fields.

- Open – if necessary - the library.
- Choose *Tools > Link Term Lists* or Press <Ctrl+3>.
- Link the MeSH term list to the fields *Keywords* and *Abstract*.



- Click *OK*.
- Click *Close*.



6.6 Exporting references

Exporting bibliographies from EndNote is easy and flexible. When you export from a library, EndNote creates a file of references formatted according to the chosen style. You can use the *Export* command to create a free-standing bibliography in any of the following formats:

- ◆ **RTF (Rich Text Format)**
The RTF export is an ideal way to create a free-standing bibliography that can be edited or printed using a word processor. This format can be opened by all popular word processors and preserves font and text style information.
- ◆ **Text File**
The Text File export option is suitable for draft purposes or exporting references to be imported into another database.
- ◆ **HTML**
Documents exported in HTML (Hyper Text Markup Language), provide an easy way to post reference lists on the World Wide Web.
In your Web browser, set encoding to “Unicode-UTF 8” to appropriately display extended Unicode characters in the exported document.
- ◆ **XML**
The XML option exports in a proprietary EndNote XML format.

The ‘Export’ command can be a fast way to make the record numbers continuous after you’ve imported them into a new EndNote library.

6.6.1 Procedure

In the next example we export references from the *Sample_Library* in the RIS-format. The exported RIS-file can be imported into a new library or in a Reference Manager database. The result after *Import* is displayed below (see also 4.4 *Importing text files*).

1. Open the library from which you will export.
2. Select the references you want to export.
3. Right-click in the list and choose *Show Selected References*.
4. Click the *Author* columnheader to sort.
5. Choose *File > Export*.
6. The *Export file name* dialog appears.
 - ◆ In the *File name* box enter the **filename.ris** (do not forget the **.ris** extension).
 - ◆ In the *Save as type* box select the type of file to be exported (*Text File *.txt*).
 - ◆ In the *Output Style* box select *RefMan (RIS) Export*.
 - ◆ Select the *Export Selected References* option if desired. If you want to export all of the references in the current list, clear the check box.
7. Click the *Save* button.

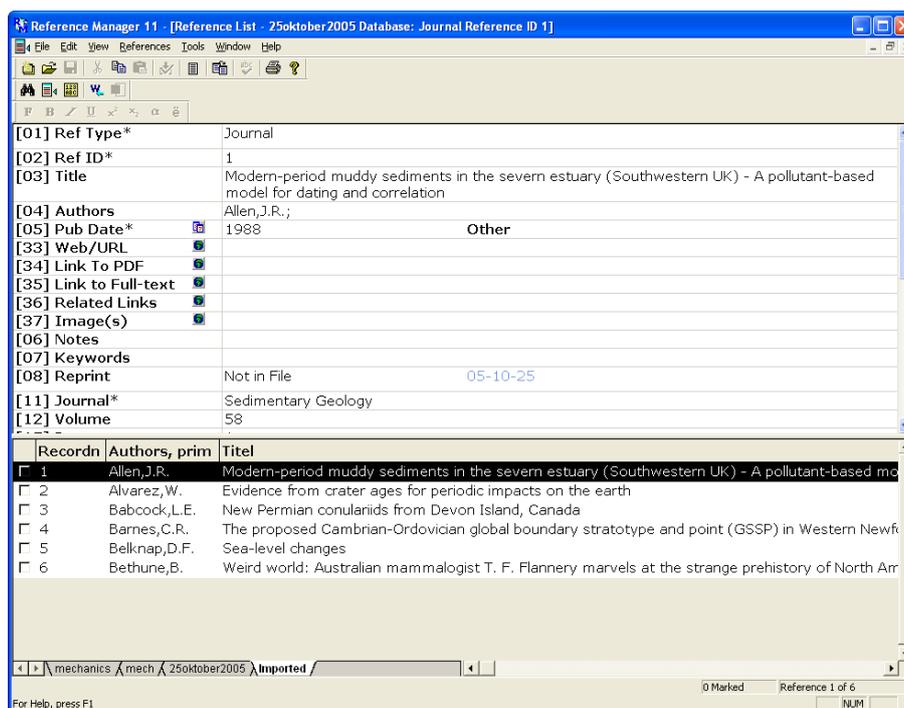


6.6.2 Importing RIS File

In this exercise we import the exported references (RIS file) in a library.



1. Double-click the RIS-file icon
2. If **EndNote** is launched, the data are imported directly in the active library. If **Reference Manager** is launched, the data are imported directly in the active database.



Note

- Before exporting references, choose the *Style* and the *Sortorder*.
- The Export command exports only text; **images are not included**. However, if you import the references back into an EndNote library, you can restore images by copying the image files from the original library's .DATA folder into a .DATA image folder for the new library.
- If you exported the references in HTML format, your exported reference list is ready to be posted directly to your Web site. In your Web browser, set encoding to Unicode-UTF 8 to appropriately display extended Unicode characters.
- If you exported the references in RIS format, the text file can be imported in a Reference Manager, ProCite or EndNote database using the RIS filter. If you change the extension of that file into **.ris**, the icon will look like this:



When you double-click this file, the *Open* dialog appears, asking in which database you want the file to be imported.



7 Customizing Reference Types

Your EndNote library can contain references from a variety of different sources, such as books, journal articles, and newspaper articles. We call these different sources **reference types**. EndNote provides built-in forms for these and other common reference types.

In addition to an all-encompassing *Generic* reference type, EndNote has:

- **51 pre-defined** reference types: Aggregated Database, Ancient Text, Artwork, Audiovisual Material, Bill, Blog, Book, Book Section, Case, Catalog, Chart or Table, Classical Work, Computer Program, Conference Paper, Conference Proceedings, Dictionary, Edited Book, Electronic Article, Electronic Book, Encyclopedia, Equation, Figure, Film or Broadcast, Government Document, Grant, Hearing, Journal Article, Legal Rule or Regulation, Magazine Article, Manuscript, Map, Newspaper Article, Online Database, Online Multimedia, Pamphlet, Patent, Personal Communication, Report, Serial, Standard, Statute, Thesis, Unpublished Work, and Web Page.
- **3 unused** reference types

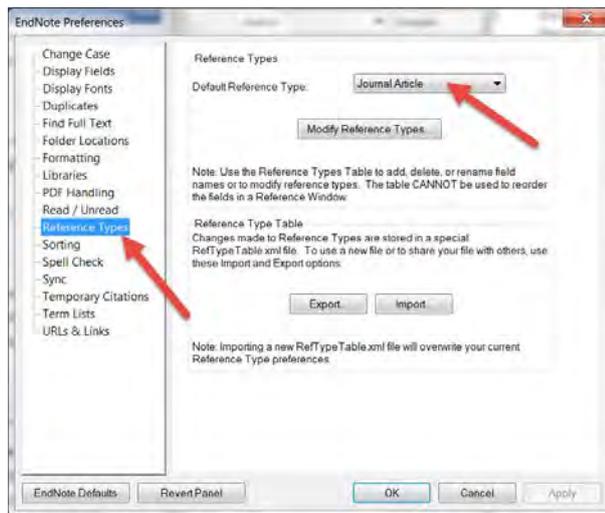
Important points about reference types

- You can **assign a particular reference type** to each reference entered into your library.
- The Reference Types preference, accessible through EndNote's Preferences, determines **which fields are available** for each of the different reference types.
- The Reference Types preference allows up to 53 different types of references, each capable of supporting up to 54 fields (including the name of the reference type).
- Of the 53 reference types, all but the *Generic* type can be modified.
- Use the *Reference Types* preference to add, delete, or rename fields. You can also add or hide complete reference types.
- The layout of the *Generic* reference type should be used as a guide when modifying or creating reference types. **Rows reserved for Authors should be used only for names.**
- Changes made to the Reference Types preference are stored for each user in a **RefTypeTable.xml** file which is located in the folder **Documents and Settings\UserName\Application Data\EndNote**. They apply to all libraries opened under the current user account.
- If you move your library to a different computer, your references will follow the layout of the Reference Types preference for the current user account on that computer, unless you also transfer a copy of your reference type table.
- Do not enter reference data into the Reference Types preference. This dialog is designed to store just the names of the reference fields.
- When you use Cite While You Write to insert figures in Microsoft Word, figures found in the Chart or Table reference type are inserted as tables. Figures found in any other reference type in EndNote will format as figures in Word.

7.1 Setting a Default

By default, the *Journal Article* reference type appears when you create a new reference. If you would rather have new references automatically appear as books, patents or some other reference type, change the default setting. This is how you proceed:

1. Choose *Edit > Preferences*.
2. Click on *Reference Types*.
3. Click the *Default Reference Type* list and choose from one of the available reference types.



4. Click *Apply* to save the change.

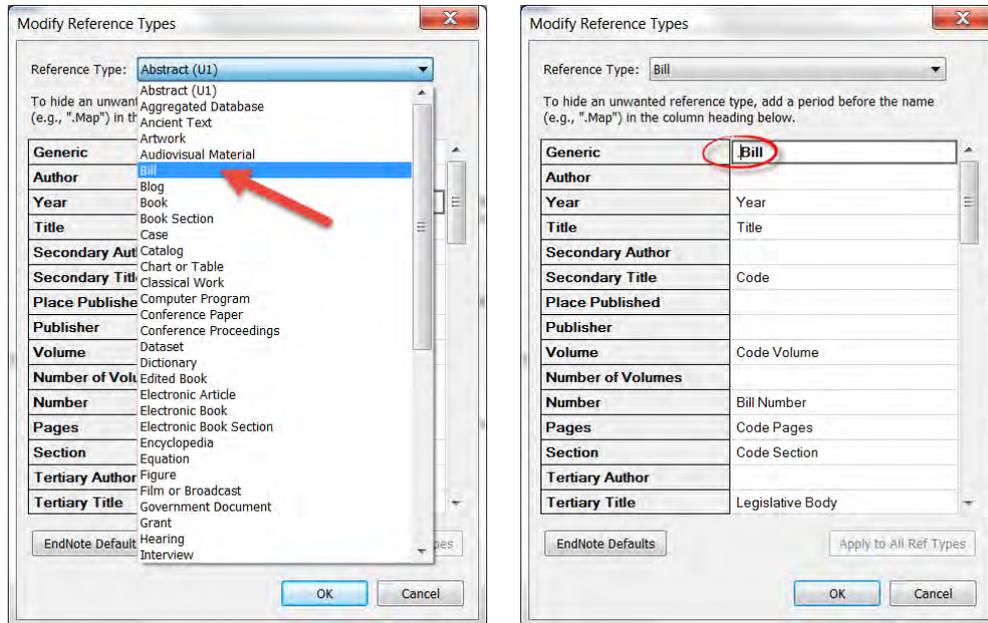
7.2 Hiding unwanted

To hide an unwanted reference type:

1. Choose *Edit > Preferences*.
2. Select the *Reference Types* option in the list of preferences.
Click the *Modify Reference Types* button to open the *Modify Reference Types* dialog.
3. Use the drop-down list at the top to find the reference type that you want to hide.



4. Add a period before the reference type's name in the column header to have EndNote remove that item from the *Reference Type* list in the Reference windows and elsewhere. The definition, however, remains in case you later wish to restore it by removing the period.



5. Click *OK* to return to the main *Preferences* window for Reference Types.
6. Click *OK Save* to save your changes.

7.3 Customizing

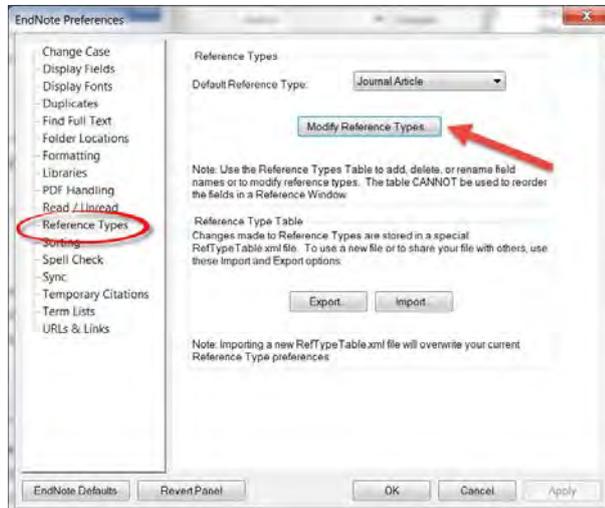
All of the reference types, except for *Generic*, can be modified using the Reference Types preference. Whenever you make a change to a reference type, you should also edit your styles to make sure that they correctly format the new or modified reference types.

There are different ways you can customize the various reference types. If an existing reference type does not contain all of the fields that you need, you can define a new field or rename an existing field. Similarly, if there is a field that you know you will never use, you can delete it from the reference type so that it no longer appears in your references.

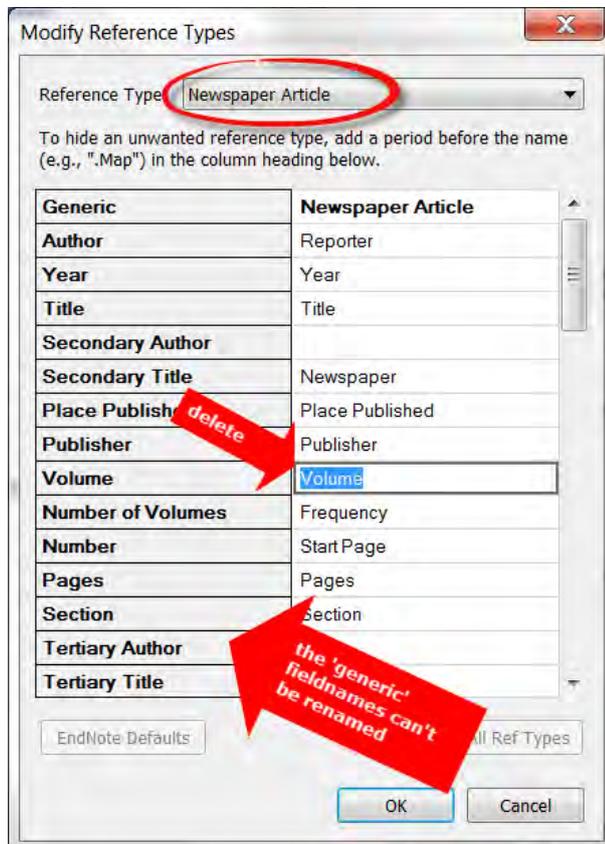
In the example below we customize the *Newspaper Article* Reference Type (See also chapter 4.1.1 *How many fields must be filled in to obtain a reference conform a bibliographic format?*).



1. Choose *Edit > Preferences*.
The *EndNote Preferences* dialog appears.
2. Select *Reference Types* in the list of preferences.
Click the *Modify Reference Types* button to open the *Reference Types* preference.



3. The *Modify Reference Types* window appears.
Select *Newspaper Article* in the *Reference Type* drop-down list.
4. The fields: *Reporter*, *Year*, *Title*, *Newspaper*, *City*, *Pages*, *Edition* and *Issue Date* remain unchanged. The other fieldnames may be removed.



5. Click *OK*.



7.4 Export

The *Reference Type* settings are saved in the **RefTypeTable.xml** file that can be found in

Windows 7: *C:\Users\username\AppData\Roaming\EndNote*

To back up your custom reference types:

1. Choose *Edit > Preferences*.
2. Click the *Reference Types* option in the list of preferences.
3. Under Reference Type Table, click *Export* to display a file dialog.
4. Name the file, select a folder where you will be able to find it later. Click *Save*.

EndNote will append an **.xml** suffix to the file name.

Note

- ♦ If you edit the Reference Type, don't forget to edit the Output Style.
- ♦ If you move your library to a different computer, your references will follow the layout of the Reference Types preference for the current user account on that computer, unless you also transfer a copy of your **RefTypeTable.xml** file to the other user's **Documents and Settings\[Your Folder]\ApplicationData\EndNote** folder.



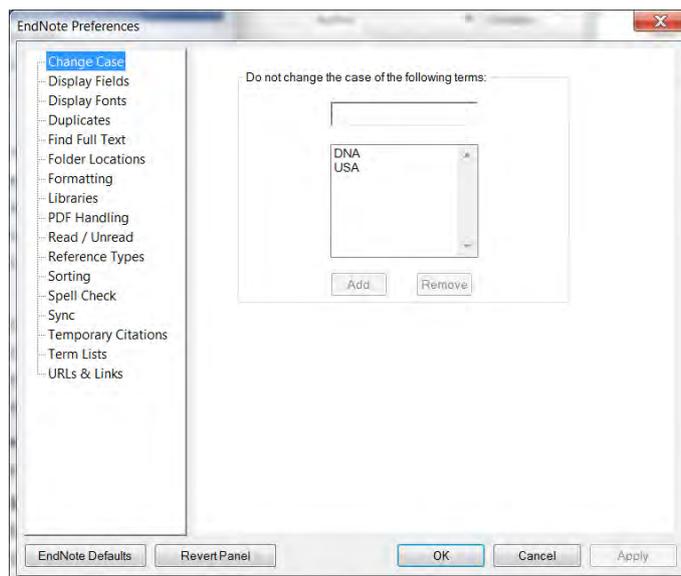
8 Preferences

Before you start working with EndNote, you might find it useful to customize the program settings. The settings for configuring EndNote's display, formatting preferences, and other options are organized in the *Preferences* section of the EndNote program. To access EndNote preferences:

1. Choose *Edit > Preferences* in the menu.
2. In the *EndNote Preferences* dialog a list of the available preference panels appears on the left side of the window. Click on the name of a panel in the list that corresponds to the setting you would like to change:

All of the preferences panels have the following options:

- ◆ *EndNote Defaults*: Reverts the settings for just the current panel to the original EndNote settings.
- ◆ *Revert Panel*: Removes any changes made to the current panel since it was last saved.



8.1 Change Case

The EndNote styles can be configured to change the capitalization of the author names or titles. Use the *Change Case* preferences to list the words that should *not* be modified when EndNote changes the case of titles or authors. This can be used for special acronyms, equations, proper nouns, or compound names that require consistent capitalization.

For titles, this preference is used only when an output style is set up to apply *Headline style capitalization* or *Sentence style capitalization* (rather than *Leave titles as entered*).

8.2 Display Fields

Use the *Display Fields* preferences to change:

- The order of the columns in the *Library Window* (by default the first column in the Library window displays a *Read / Unread* indicator followed by: **File Attachments, Author, Year, Title, Rating, Journal/Secondary Title, Last Updated, Reference Type**);
- The number of columns (maximum 10)
To show fewer than ten fields, select [Do not display] instead of a field name.
- The fieldnames (*Field*) and the headingnames (*Heading*).
- Select the check box next to *Display all authors in the Author field* if you would like to display all author names under the author heading in the library reference list.

These settings apply to all libraries opened on the computer.

8.3 Display Fonts

By default, any text that you type or edit in EndNote is displayed in 12 point Arial font. You can change this to another font and/or size using the *General* display font option in EndNote's preferences.

Changes made to the display fonts apply to all EndNote libraries opened on that computer. They do not affect the font used when you are formatting bibliographies in a word processing document. The normal font of the document is used for that. Changing the *General* display font simply changes the font that EndNote uses for its "*Plain Font*" and "*Plain Size*" settings. Deliberate font changes that you have made in your references are not affected by the display font.

To change the display fonts:

1. Choose *Edit > Preferences*.
2. Click the *Display Fonts* option.
3. Click the tab to indicate which display font setting you want to change. You can control the following display font settings:

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

General: The General tab determines the font and size EndNote applies when you enter text in a field in the Reference and Style windows. It also determines the font EndNote applies to text that you view in the Preview panel and information panels or when you print and copy bibliographic information from EndNote.

Labels: The Labels tab determines the font and size EndNote applies to the Reference window field labels.

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

4. Click the *Change Font* button to select a different font and/or size from the lists.
5. Click *OK* to close the font dialog and see the example text displayed in the chosen font and size.
6. Click *Apply* to see your changes in any EndNote windows that are currently open. Click *OK* to save these changes and close the Preferences dialog.



8.4 Duplicates

The *Duplicates* preferences panel sets criteria for the *Find Duplicates* command on the *References* menu.

By default, a reference is considered a duplicate when the *Author*, *Year*, *Title*, and *Reference Type* match a reference already in the library. Use this panel to customize the way EndNote identifies duplicate references.

8.5 Find Full Text

This panel allows you control over which sites, services, and technology EndNote uses when attempting to find the full text for a reference. You can limit the options in order to speed up the *Find Full Text* operation.

The check boxes determine which pieces of information will be used from your EndNote references. These represent unique identifiers for locating exact reference matches.

If your institution allows access to an OpenURL server, you can configure this panel to allow EndNote access to the site. Select the OpenURL check box, and enter the OpenURL path to direct to the online site. If the site requires authentication to verify that you are allowed access, you can enter an Authentication URL. The Authentication URL simply directs to the site's login page. When you attempt to Find Full Text, you will be directed to that page to enter authentication information (typically a user ID and password).

8.6 Folder Locations

The *Folder Locations* preferences panel is where you set the **personal** folder locations for new or modified *styles*, *import filters*, and *connection files*.

The many styles, filters and connection files **provided with EndNote** are installed in the Syles, Filters and Connection folders which are located in the EndNote program folder:

C:\Program Files\EndNote X8

All of the style, filter or connection files stored in the chosen folders are displayed in the *Style*, *Filter*, and *Connection Managers*. These Managers allow you to select individual files that you use most with EndNote.



8.7 Formatting

The Formatting preferences panel allows you to control the formatting of bibliography entries in a word processor and whether EndNote automatically omits duplicate references from a bibliography.

8.8 Libraries

Use the Libraries preferences section to specify which libraries should open by default when EndNote starts. First, use the drop-down list to choose from these options:

- ◆ Open the most recently used library
- ◆ Open the specified libraries
- ◆ Prompt to select a library
- ◆ Do nothing

8.9 PDF Handling

PDF Handling preferences allow you to define the automatic renaming process of PDF documents that you want to import to an EndNote library. These settings only apply to the renaming of PDF documents that have relative attachment links.

8.10 Read / Unread

Use these settings to apply *Read* or *Unread* status tags to your references in order to track your research.

8.11 Reference Types

Use the Reference Types preferences panel to customize your settings for the fields (such as *Author*, *Year*, and *Title*) and reference types (such as *Journal Article* or *Book*) that are used by EndNote. Any changes that you make in this panel apply to all of the libraries that open on the computer.

Default Reference Type: When you create a new reference in your EndNote library, the new reference is set up for a journal article by default. If you would rather have new references automatically appear as books, report, or some other reference type, change the *Default Reference Type* setting.

Modify Reference Type: If you need to modify any of EndNote's fields or reference types, click the *Modify Reference Types* button. This opens the *EndNote Reference Types* preference where you can add, remove, and rename EndNote's reference types and fields. See chapter 7 *Customizing Reference Types* for information about customizing reference types.

Reference Type Table: The current reference types table applies to all libraries opened under the current user account. Changes are stored in a special *RefTypeTable.xml*. If you want to share your customized reference types with others, you can use the *Export* and *Import* buttons in this dialog.



8.12 Sorting

When EndNote sorts *authors* and *titles*, you can identify what words or names to ignore for sorting purposes.

Author Field: the *Author* Field list is designed so that you may enter parts of author names that may be omitted for sorting purposes. For example, prepositions in names such as 'von', 'van' and 'de' are included as part of the last name, but not considered part of the name for sorting purposes. The entries in the Author Field list are case sensitive; that is, if you enter 'von' it applies only to 'von' and not 'Von'.

Title Field: When terms are added to the *Title* Field list, the sorting routine ignores them when they appear at the start of the title. Capitalization does not matter for these words. That is, the word 'the' can be entered (lowercase) and still apply to 'The'.

8.13 Spell Check

On the Spell Check preferences panel, you can set general spell check *Options* and select or modify *Dictionaries*.

8.14 Sync

This dialog saves subscription credentials and sync settings to automate the process of synchronizing your EndNote library with your EndNote online library.

Sync Preferences allow you to set your preferences so that:

- You only have to enter your e-mail address and password once in *Sync Preferences* and not each time you manually synchronize your references between EndNote desktop and EndNote online.
- You can have EndNote automatically begin the Sync process every 15 minutes (background processing) by selecting the *Sync Automatically* check box.

You must first register and have an active EndNote online account to initiate the Sync process. Registration is fast and easy and activates your two-year EndNote online account. When completed, EndNote automatically proceeds with the Sync process and updates your new EndNote online library to match the groups in your EndNote library.

8.15 Temporary Citations

Assuming that the *Instant Formatting* is turned off, EndNote will insert a temporary citation (or unformatted citation) into your word processing document when you use the *Insert Citation(s)* or *Insert Selected Citation(s)* command from Word's *EndNote* tab, or when you *Copy* and *Paste* a citation into a document. You can also type temporary citations into your document. The temporary citation is a placeholder that EndNote later changes to a formatted citation, such as (Volckaert & Verstraete, 2017).

By default a temporary citation includes the first author's last name, the year and the EndNote record number, enclosed in curly braces:

{Volckaert & Verstraete, 2017 #24}



If necessary, you can change the temporary citation delimiters using the settings in this panel.

8.16 Term Lists

By default, every new EndNote library has three term lists associated with it: *Authors*, *Journals*, and *Keywords*. The term lists are automatically updated as you enter references into your library. The terms in these lists are also used to facilitate data entry using the *Suggest terms as you type* feature. This feature suggests terms as you type into fields with term lists linked to them. When you enter a new term that is not currently in the associated term list, it appears in red text to indicate that it is a new term. This can point out typing mistakes or the use of an incorrect keyword if you thought you were entering a name or a term commonly used in your library.

8.17 URLs & Links

Connection Log File

When you use the *Online Search* command to connect to an online database, EndNote keeps a copy of all the retrieved references for that session in the connection log file (the file name is *Connect.log*). This happens by default, but you may turn this option off by clearing the *Use Log File* option.

ISI Base URL

When you export references from the Web of Science Core Collection to EndNote, EndNote creates a "Go to ISI" link in the URL field of each reference. These links take you back to the source record where you can find related references, times cited, and other information. If you have upgraded from an earlier version of EndNote, you may need to click EndNote Defaults to update the ISI Base URL to the latest setting.

If your institution uses a locally mounted version of the Web of Science Core Collection, you should enter the URL for that server here in EndNote's ISI Base URL preference. Otherwise, the links in references downloaded from the Web of Science Core Collection will take you to the main Web of Science server where you might not have access

OpenURL Arguments

The *OpenURL Link* command on the *References* menu starts your default web browser and displays the full text article (if available) plus a list of links to similar articles. It connects to an OpenURL standard syntax server and uses these OpenURL preferences along with data in your EndNote record to find related online references.

Attached Files

When you choose *References > File Attachments > Attach File* to insert a link to a file, you have two options available to you. You can:

- **Insert the file as a relative link**

In this case, EndNote makes a copy of the original file and places it in the DATA\PDF folder that is part of your EndNote database. EndNote will always be able to access the file, even when you share your database with a colleague. However, if you edit the original file on your computer, those changes will not be reflected in EndNote. You would need to clear the file from your EndNote reference and reinsert the file.



- ◆ **Insert the file with an absolute path**

In this case, EndNote will always look in the original folder for the inserted file. This can be helpful if you plan to edit the original file, and you want those changes reflected when you access the file from within EndNote. However, if you ever move the file from the original folder, EndNote will not be able to access it unless you clear the file from your EndNote reference and reinsert it from the new folder location. If you send your database to a colleague, the file will not be available.

By default, the check box titled *Copy new file attachments to the default file attachment folder and create a relative link* is selected, so that EndNote will copy linked files to the DATA\PDF folder. You can deselect this box in order to save absolute paths. You can always override this default setting on the file dialog when you are inserting a file.



9 Output Styles

An output style is designed as a complete solution for formatting and arranging **in-text citations**, **footnote citations**, and **bibliographies** for all types of references.

EndNote includes more than 3.000 individual bibliographic styles. Each one of these styles is stored as an individual file in the Styles folder in your EndNote folder. The name of the style refers to the journal or publisher that has defined the bibliographic format. The Nature style, for example, is based on the format required by the journal Nature, and the Chicago style is named after the Chicago Manual of Style.

Styles can be modified and new styles can be created with EndNote's Style Manager. By default, EndNote's four standard bibliographic styles are installed in your *Output Styles* menu:

- ♦ *Annotated*: generates an Author-Date style bibliography with abstracts.
- ♦ *Author-Date*: generates bibliography alphabetized by author name, and in-text citations with Author and Year.
- ♦ *Numbered*: generates a numbered bibliography with corresponding numbered in-text citations.
- ♦ *Show All Fields*: generates a list of the references as entered, including all fields and the names of the fields.

A single reference could be formatted in the *Harvard* or the *Nature* style like below:

Harvard

Chipperfield, M. P. and Pyle, J. A. (1988) *Geophysical Research Letters*, **15**, 875.

Nature

1. Chipperfield, M. P. & Pyle, J. A. 2-dimensional modelling of the antarctic lower stratosphere. *Geophysical Research Letters* **15**, 875 (1988).

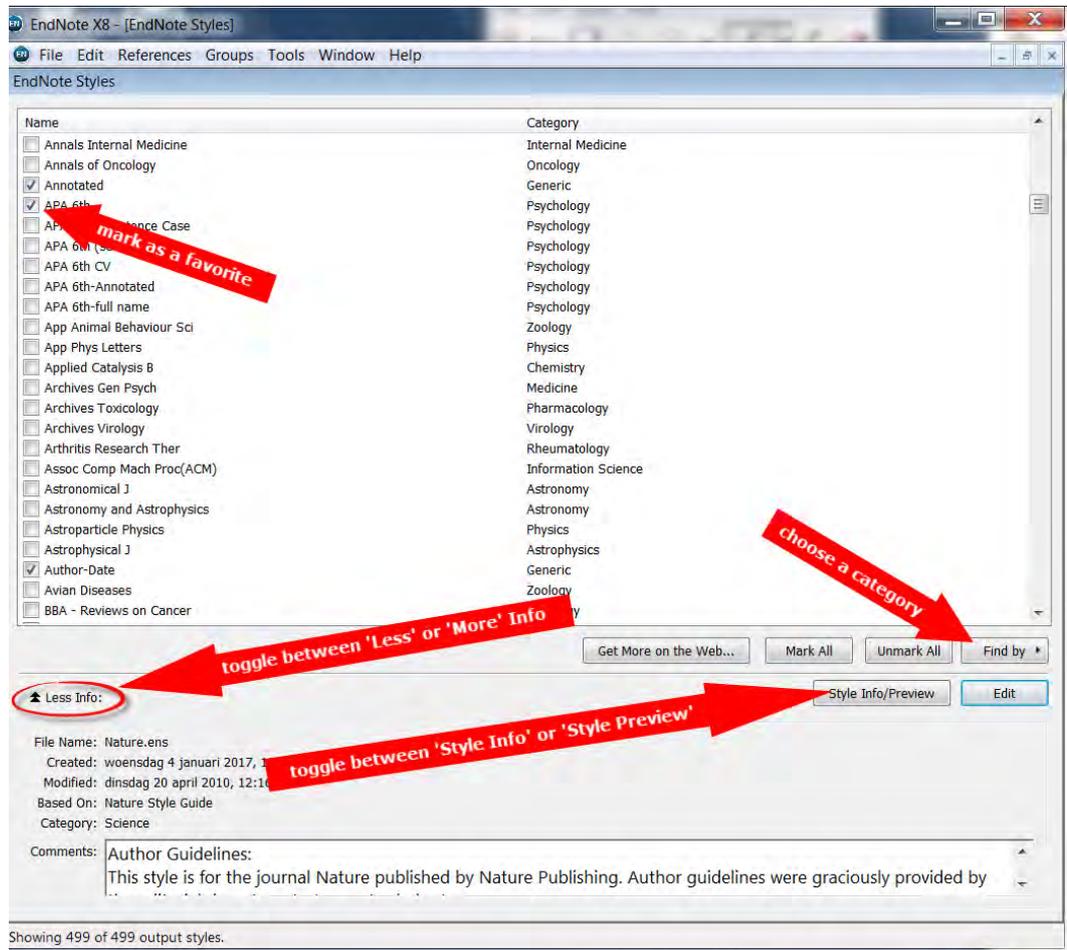
Note

- ♦ Styles in the Export category, such as 'RIS' are not bibliographic styles, but rather export styles designed to aid in transferring EndNote data into other databases.
- ♦ The style selected in the *Output Styles* submenu of the *Edit* menu (or the style menu on the toolbar) determines how references are formatted for the preview in the Library window as well as for the *Format Bibliography*, *Format*, *Print*, *Export* and *Copy Formatted* commands.
- ♦ Styles made with an older version of EndNote can be edited and used in the recent EndNote version.

9.1 Opening an Output Style

The best way to understand how a style works is to open one up and look at it.

1. Choose *Edit > Output Styles > Open Style Manager*.
2. The *Open Output Style* window appears.



3. Select an Output Style.
4. Click the *Edit* button.
The *Edit Style* window appears.

All of the different options for editing a style are listed on the left side of the style window.

- ♦ The first four items (*About this Style*, *Anonymous Works*, *Page Numbers* and *Journal Names*) are general options and apply to citations, bibliographies, and citations in footnotes.
- ♦ The rest of the options in the Style window are grouped in four headings: *Citations*, *Bibliographies*, *Footnotes* and *Figures & Tables*.

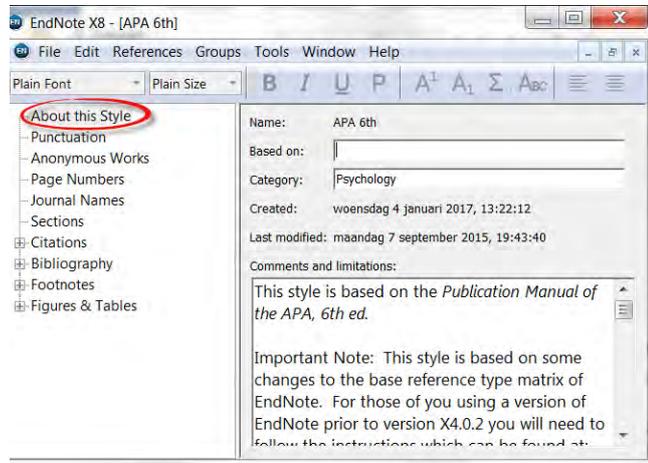


9.1.1 General options

The first six items apply to *Citations*, *Bibliographies* and *Footnote Citations*:

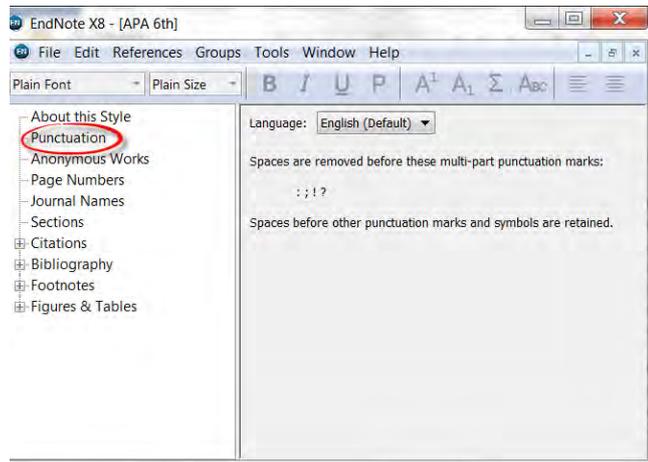
About this Style

When you define a style, you can order it in a category. For this purpose you can use existing EndNote categories, or make new ones.



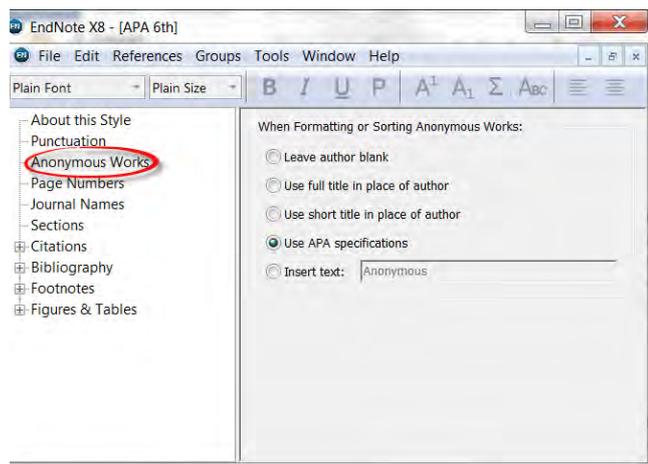
Punctuation

punctuation is applied according to the chosen language.



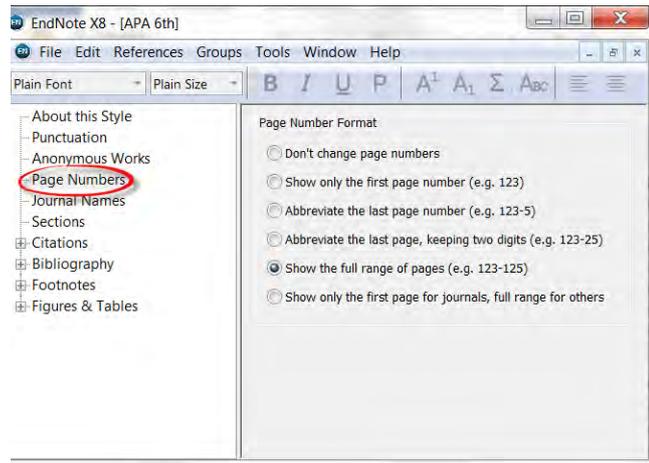
Anonymous Works

Anonymous works are defined by EndNote as references where the Author field is blank. The settings in the Anonymous Works panel apply to all sections of a style (Citations, Bibliography, and Footnotes).



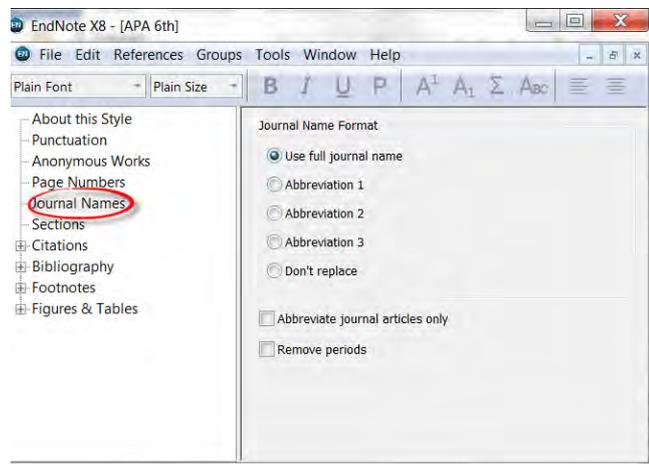
Page Numbers

in this window you can define how page numbers are formatted.



Journal Names

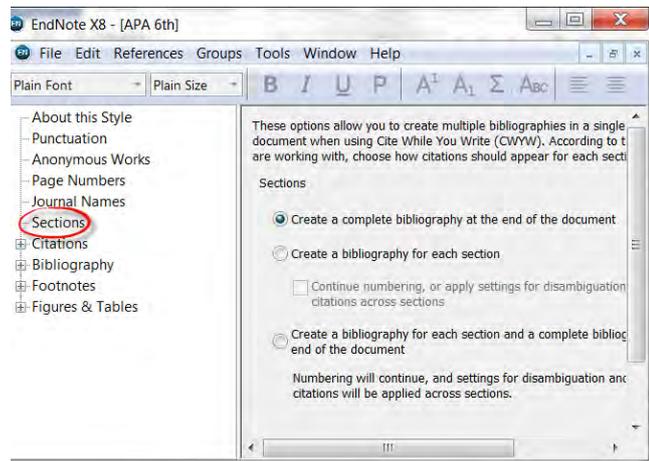
in this window you can define how Journal names are formatted. If nothing is entered in the Journals term list or if there is no special Journals term list, the Journal Names option always defaults to *Don't Replace*, and EndNote uses the journal name exactly as it appears in the original reference.



Sections

the special options can only be applied if you work in Microsoft Word. You can choose where the bibliography has to appear:

- at the end of the document or
- at the end of each section or
- at the end of the document and also at the end of each section.



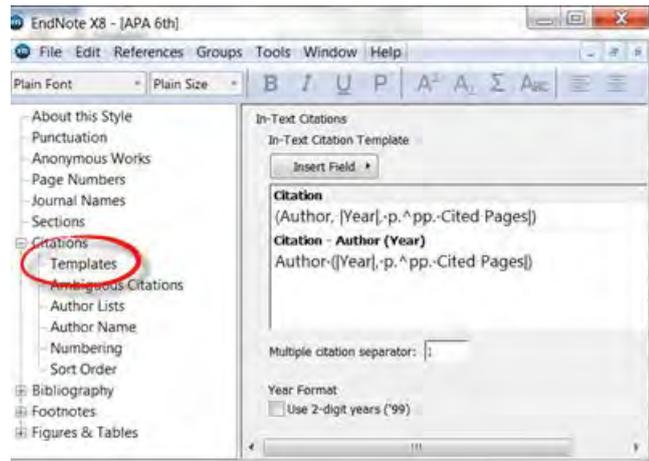
9.1.2 Citations

A *citation* or *in-text citation* is a brief bibliographic information in the body of your text that refers to a complete reference in the bibliography. The most popular formats are a (*Author, Year*), [*numbered*] and *Author (Year)*.



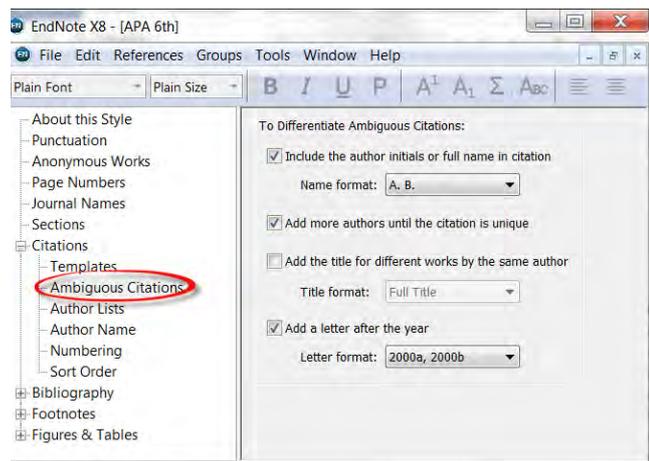
Templates

This template tells EndNote how to format the in-text citations in the body of your paper. For example, the *Numbered* style uses a bracketed bibliography number for the in-text citation. An *author-year* type of style would probably display something such as (Author, Year) in the citation template. You may change the template by deleting text, unwanted field names or punctuation, retyping the punctuation you want and inserting new fields with the *Insert Field* button.



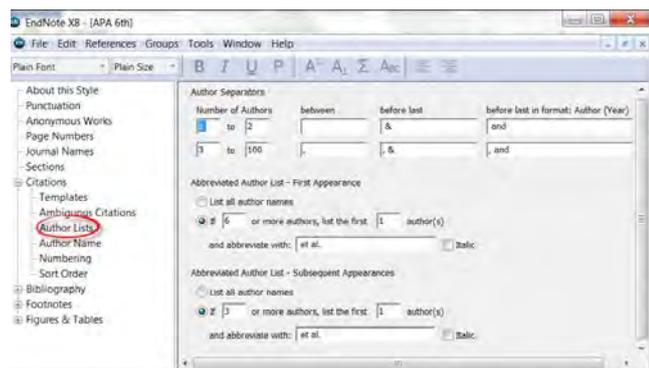
Ambiguous Citations

References can have identical in-text citations if they are by the same author or the authors have the same last name. This leads to ambiguity in the citations that would make it impossible for the reader of your paper to know which reference you are referring to. EndNote provides various ways to avoid this sort of ambiguity in your citations. Note that these settings assume the author is used in the in-text citation. They are not relevant for styles that use bibliography numbers for the in-text citations as it is not possible to have ambiguous citations when they are uniquely numbered.



Author Lists

The *Author Lists* panel let you specify exactly how the authors are to appear in the formatted in-text citation. If your citations are numeric, ignore the *Author List*.



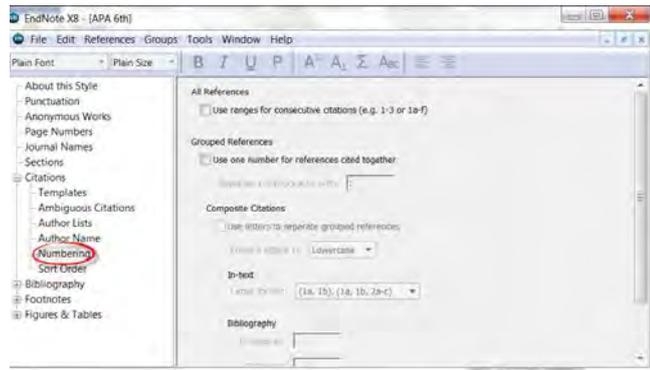
Author Name

The Name Format section allow you to specify how the author names should look, whether the first or last name should come first, and whether there should be a comma after the last name.



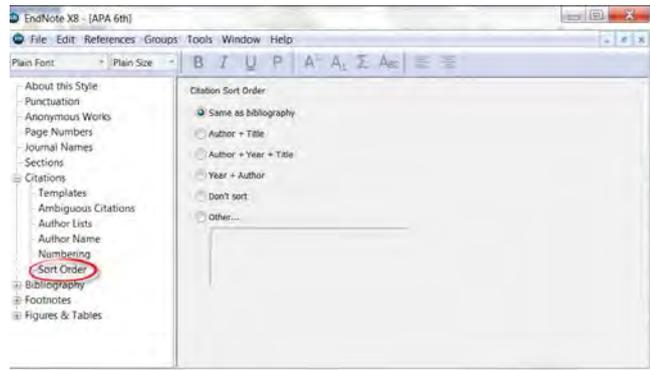
Numbering

The settings in the citation *Numbering* panel apply only when 'Bibliography Number' is used in the Citation Template. This creates uniquely numbered citations in the text of the paper; the numbers correspond to entries in the bibliography.



Sort Order

The *Sort* panel under the *Citations* heading allows you to set the order that the style uses to sort multiple in-text citations

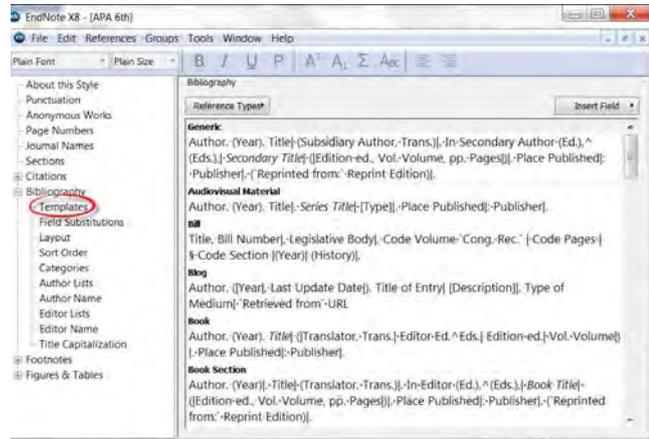


9.1.3 Bibliography

Click *Templates* under the *Bibliography* heading to see the templates for how those references are formatted.

Templates

For footnote and bibliography templates, each has a *Generic* template, and other reference-type-specific templates to format the various reference types in a bibliography. The *Generic* template is used to format references that use the Generic reference type or do not have their own template in the style. The rest of the templates in the style tell EndNote how to format specific reference types, such as journals, books, and book sections.



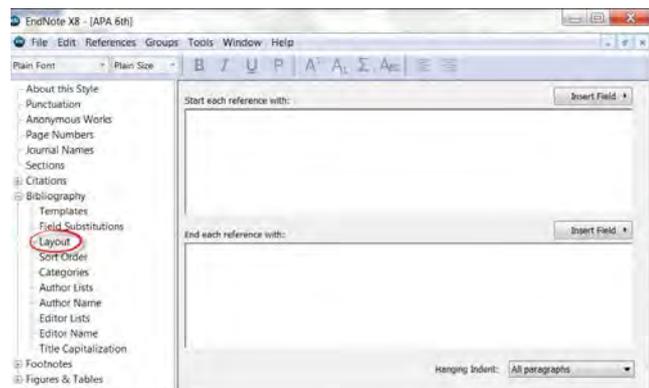
Field Substitutions

The Field Substitutions panels under the Bibliography and Footnotes headings allow you to substitute another field in the bibliography and footnotes of a reference if one of the following fields is empty: DOI, PMCID, Volume and Pages



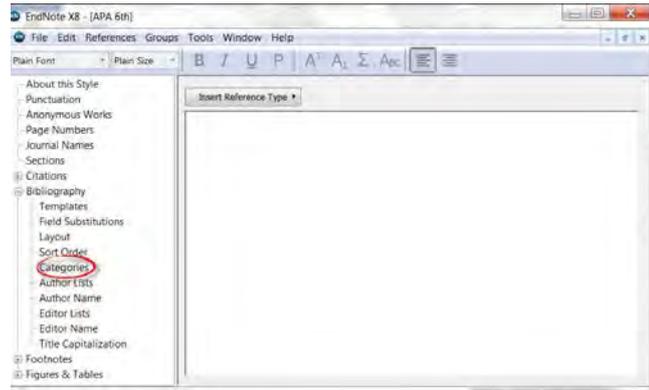
Layout

Under the *Bibliography* heading there is a *Layout* option that provides options for inserting text before and after each reference in a bibliography, as well as applying hanging indents to your references.



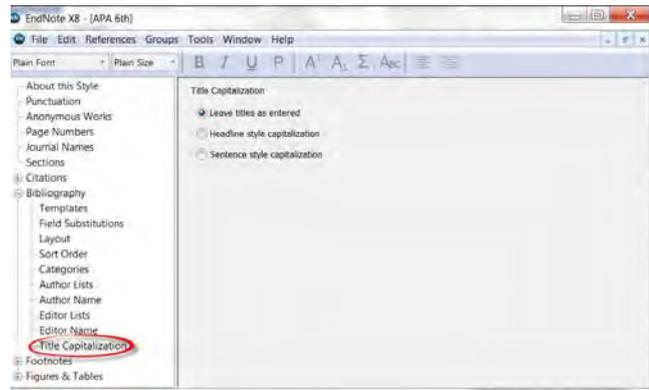
Categories

This feature allows you to add subject categories to your Microsoft Word documents that are associated with specific reference types. When EndNote creates the bibliography in Word, it organizes your citations based on the category and the associated reference type.



Title Capitalization

Both the *Footnotes* and *Bibliography* sections have a *Title Capitalization* panel. This lets you enter one style of capitalization for the titles in your bibliographic references, and another format for when the references appear in footnotes.



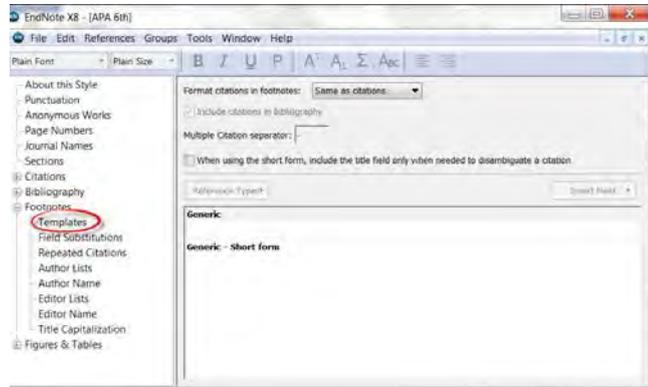
9.1.4 Footnotes

Click *Templates* under the *Footnotes* heading to see the templates for how those references are formatted.

Templates

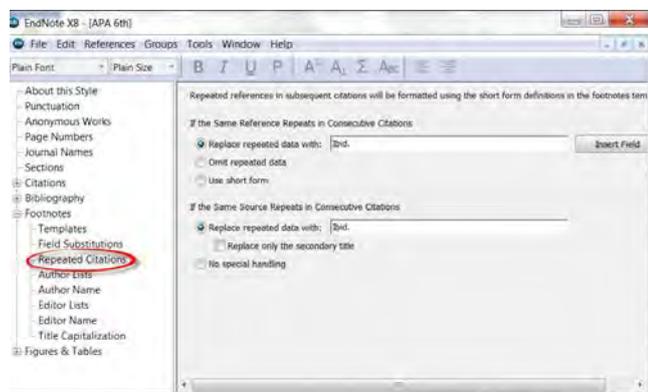
The template defines how citations in footnotes should be displayed. The options at the top of the Footnote *Templates* panel allow for the different formattings:

- ♦ *Same as bibliography*: if you want your citations in the footnote to be formatted as full bibliographic references, choose this option;
- ♦ *Same as citations*: no need to create a special template for footnotes. The citations will be formatted just like the in-text citations;
- ♦ *Using footnote format*: if you want your own special format, choose this option.



Repeated Citations

Most of the complex formatting in footnotes is relevant only to styles in the humanities. There are a wide variety of formats required for citing references in the footnotes of a paper. These options are provided in the *Repeated Citations* panel under the *Footnote* heading.



9.1.5 Figures & Tables

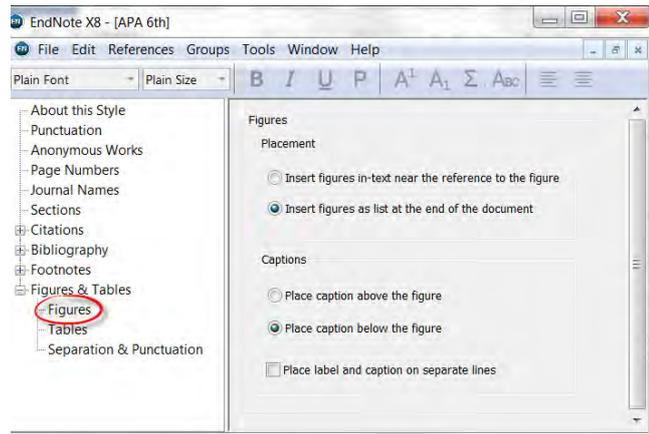
Under the Figures and Tables heading in the left column of the output style editor, select either *Figures* or *Tables*. The Figures and Tables settings apply to images inserted into a Word document from EndNote. You can place images where they are cited in a document or at the end of the document, and you have control over the placement and punctuation of labels and captions.

The same options are available under each, which allows you to place figures differently than tables.



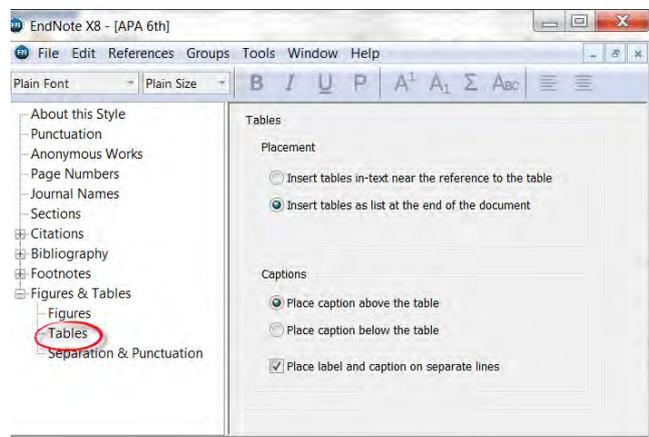
Figures

Figures are images inserted from the *Image* field of any other EndNote reference type.



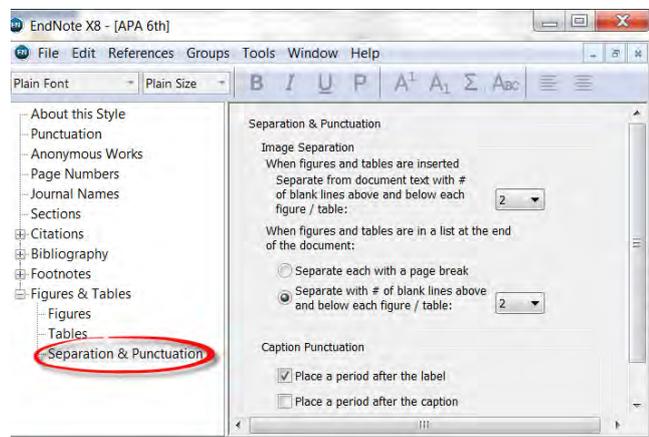
Tables

Tables are images inserted from the *Image* field in the *Chart/Table* reference type.



Separation & Punctuation

Under *Image Separation*, you can enter separators for images inserted within the text of a document and for images that are listed at the end of a document. The settings on this panel affect both figures and tables.



9.2 Creating Output Styles

It is often easier to modify an existing bibliographic style that closely resembles a style that you need than it is to create a new style from scratch.

Creating a bibliographic style involves building templates for the in-text citations and the bibliographic references to mimic how you want them to appear in your paper. Then adjust the various options to be sure that authors, titles, pages, and other fields are being formatted according to your requirements.

9.2.1 Rules for Working with Style Templates

There are four basic rules of *dependence* that govern how text, spaces, and field names influence each other when they are used in a style template:

- **Rule 1: Basic dependence**

Any text or punctuation that is not separated from a field name by an ordinary space is *dependent* on the adjacent field.

In this context, 'dependent' means that the text or punctuation adjacent to a field *only* appears in your bibliography if the adjacent field contains data. For example:

Volume (Issue)

the parentheses around "Issue" only appear in a formatted reference if there is an issue number for the reference.

- **Rule 2: The preceding field takes precedence over the following field**

When punctuation appears between two fields with no intervening spaces, it is dependent on the preceding field. In this example,

Volume:Issue

the colon is dependent on the Volume field. This means, if there is no volume in the reference, the colon will not appear. If there is a volume, the colon will appear.

- **Rule 3: The first space after a field is dependent on that field. Additional spaces are independent**

The first ordinary space following a field is always dependent on that field. Any consecutive spaces after that are independent and will always appear in the formatted references.

For example, if EndNote formats an anonymous book using a template that has the Author field followed by a space and the Title field:

Author. _ Title

the title will *not* be preceded by a space in the final formatted reference because the space, just like the period, is dependent on the Author field. However, if the style includes two spaces between the Author and the Title:

Author. _ _ Title

the title will be preceded by one space for all anonymous references. The first space, being dependent on the Author field, disappears when there is no author, however the second space is *independent*, so it remains in the formatted reference.

- **Rule 4: Independent text always appears in the bibliography**

Any text or punctuation that is not dependent on a field name always appears in the formatted references. For example, if:

Edition ed.

is entered into a style's Book template using only an ordinary space to separate the text 'ed.' and the field 'Edition', the text 'ed.' will appear in all Book references—regardless of whether or not there is an edition for that reference.



9.2.2 Special Formatting Characters

EndNote has special formatting characters that add flexibility and precision to the grouping of punctuation and fields in the style templates. Use the *Insert Field* button to insert the special formatting characters.

- Link Adjacent Text** (using <Ctrl+Alt+Space> = *non-breaking space*).
 It joins two or more items together so they act as a single unit. Thus, any text or punctuation 'glued' to a field will drop out of the bibliography if that field is empty. You can insert a non-breaking space by selecting *Link Adjacent Text* from the *Insert Field* list in the *Templates* panels. You can also enter it by typing Ctrl+Alt+Space. It appears on the screen as a small diamond.

Example: vol♦Volume (vol=text and Volume=fieldname)

Book Section

```
Author:·Title|.In:·Book·Title|,·Edition·ed|.Edited·by·Editor|.City|:·Publisher|,vol·Volume|,·p.  
^pp·Pages|,·Year
```

Non-breaking space

- Forced Separation** (using the *vertical bar*).
 If you do not want text or punctuation to be dependent on the preceding or following field, use the vertical bar character (|), to force a separation of the text from a field.

Example: (Year)|. (the final period after the vertical bar is independent and will be printed, regardless of the content of the '(Year)' field).

Journal Article

```
Author:·Title:·|·|,·Pages|·(Year)|.
```

Forced separation

- Field Names in Bibliographies** (using *accent grave* before and after the text).
 Sometimes you may need to use text in a template that is also an EndNote field name for that reference type. To force EndNote to interpret a word as just text and not as a field name in a template, put an *accent grave character* before and after the word. Remember to also use the non-breaking space to link the text to the fieldname.

Example: `Version` Version (`Version` =text and Version=fieldname).

Computer Program

```
Programmer:·(Year)·Title|·(`Version`·Version)|·[Type]|·City|:·Publisher|.
```

Accent grave

- Singular/Plural** (using *Caret* ^).
 You can specify both singular and plural forms of labels for editors or pages in a formatted reference by using a caret (^) to separate the terms. In the style template, enter both the singular and plural forms of the label separated by a caret (insert it from the *Insert Field* list or type Shift+6). Any text before the caret, back to but not including the preceding space, is used for the singular form; text after the caret, up to the next space, is used for the plural form.

Example: ed.^(eds.)

Book

```
Author:·|·(ed.^{eds·Series·Editor})·(|Publisher|,·City|,·Year|)|.
```

Singular/Plural



9.2.3 Editing Output Style

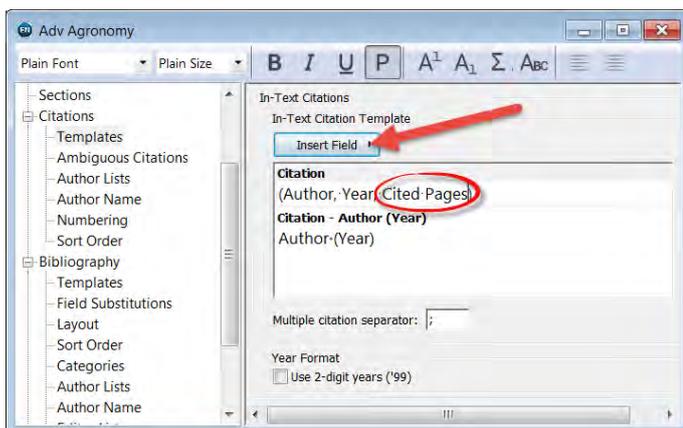
It is often easier to modify an existing bibliographic style that closely resembles a style that you need than it is to create a new style from scratch. In the example below we edit an existing Style (*Agronomy J*) in which we build a new template for the in-text citations and the bibliographic references of the *Newspaper Article* RefType. After applying the Output Style on the references, they look like:

M. VOLCKAERT, *Capella Academica viert feest*, in *Campuskrant*, 19 mei 2017, p. 8-9.

To create a style template:

1. Choose *Edit > Output Styles > Open Style Manager*.
2. Select the Output Style you want to edit.
3. Click the *Edit* button.
4. In the *Styles* window the category *About this Style* is displayed.
In the *Based On* box the original style name is entered.
In the *Category* box you can enter a category.
In the *Comments and Limitations* box you can enter comment and information
5. Choose *File > Save as* to save a copy to your personal *Styles* folder. You can find the location in the menu *Edit > Preferences > Folder Locations*.

9.2.3.1 Citations



9.2.3.2 Bibliography

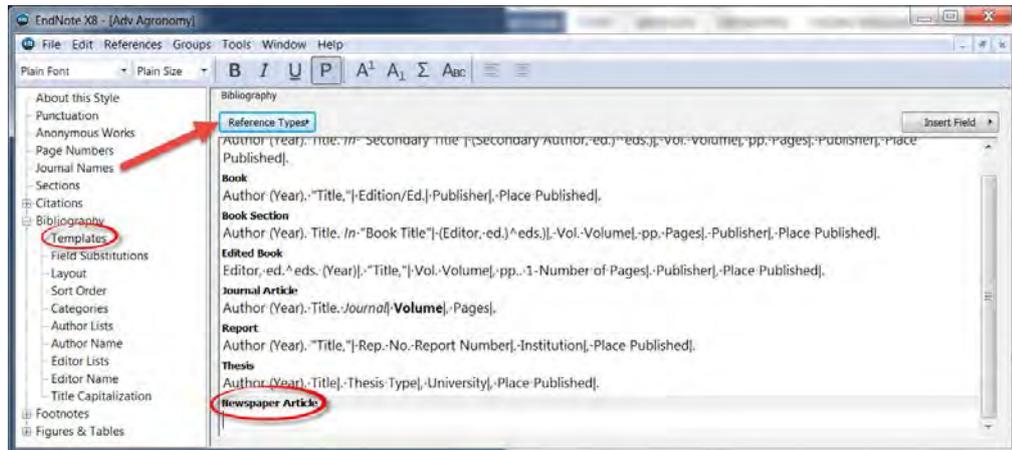
In a first step, a template is created. Then we apply field properties.

Step 1 – Creating a template

To define the style we use the *Insert Field* button. To format the style we use the *Format* toolbar. The Style, will be applied in the *Newspaper Article* Reference Type.



1. Click *Templates* under the *Bibliography* heading.
Click the *Reference Types* button and select *Newspaper Article*.

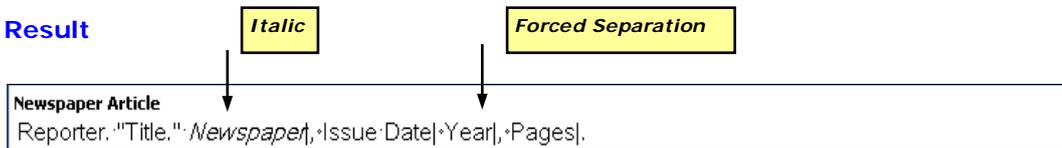


2. Click the *Insert Field* button
Choose **Reporter**
Type a **period**
Type a **space**
Quote
3. Click the *Insert Field* button
Choose **Title**
Unquote
Type a **space**
4. Click the *Insert Field* button
Choose **Newspaper**
Double-click the Newspaper field to select it
Click the *Italics* button to italicize the title
Click after the field and turn off italics
5. Click the *Insert Field* button
Choose **Forced Separation**
Type a **comma**
6. Click the *Insert Field* button
Choose **Link Adjacent Text**
7. Click the *Insert Field* button
Choose **Issue Date**
8. Click the *Insert Field* button
Choose **Forced Separation**
9. Click the *Insert Field* button
Choose **Link Adjacent Text**
10. Click the *Insert Field* button
Choose **Year**
11. Click the *Insert Field* button
Choose **Forced Separation**
Type a **comma**
12. Click the *Insert Field* button
Choose **Link Adjacent Text**
13. Click the *Insert Field* button
Choose **Pages**



- Click the *Insert Field* button
Choose **Forced Separation**
Type a **period**

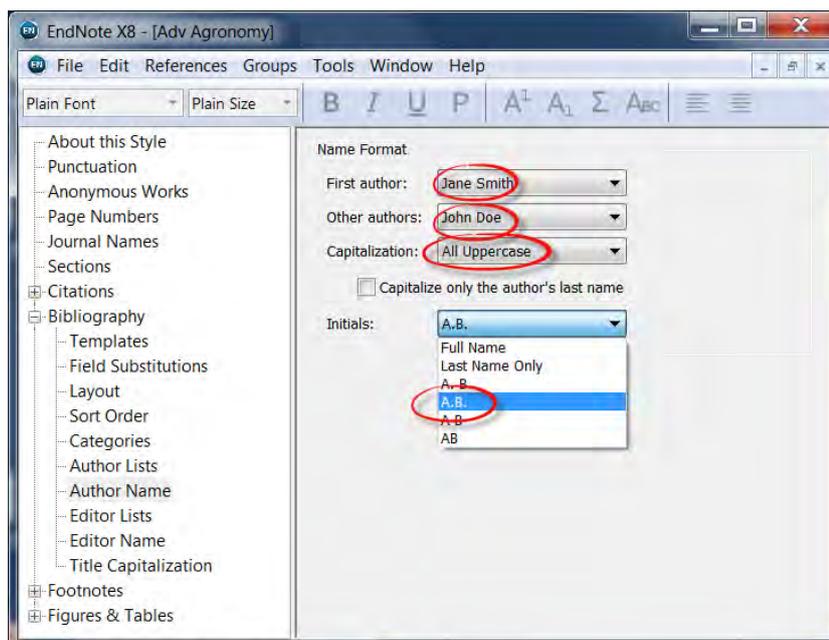
Result



Step 2 - Field properties

The template that we created in the previous exercise is not finished yet. The author names should be capitalized and the initials should be displayed before the name. These settings can be chosen

- Click in the Reference Type (**Newspaper Article**) you want to edit.
- Klik op *Author Name* onder de categorie *Bibliography*.
Be sure that you select *Author Name* from under the *Bibliography* heading.
Choose the order **FirstName Name** in the *First author* and *Other Authors* list.
Choose **All Uppercase** in the *Capitalization* list.
Choose **A.B.** in the *Initials* list.



- Click the *Close* button.
- Click **Yes** to save the Style.

9.2.4 Modifying Style template for footnotes

Styles have varying requirements for how citations in footnotes should be formatted. The options at the top of the Footnote *Templates* panel allow for the different conditions.

For some styles, citations in footnotes are formatted just like in- text citations (in the body of the paper). In that case, there is no need to create a special template for footnotes, simply choose the *Same As In-text* option from the Footnote Format options.

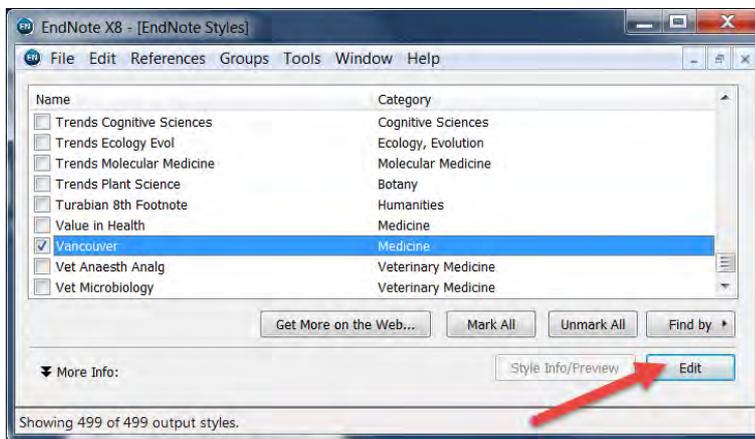


Similarly, some formats request that citations in footnotes are formatted as full bibliographic references, exactly like the bibliography. For those styles, you can set the footnote format option to *Same as Bibliography*.

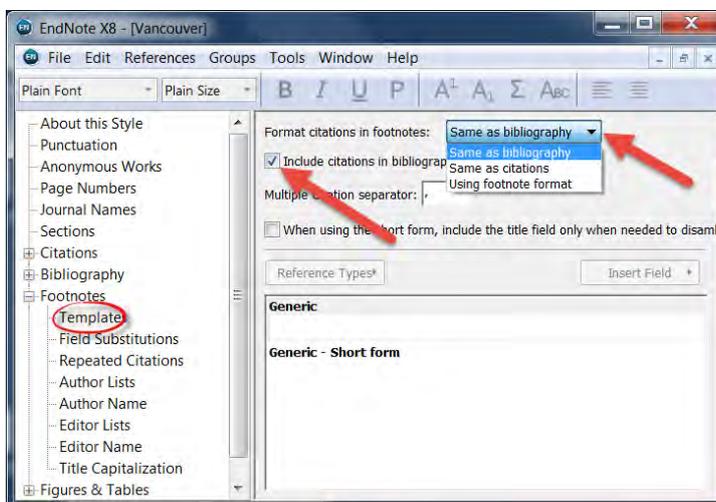
However, if you need the footnotes to use their own special format (most styles for the humanities require this), you would choose the option to format citations in footnotes with a unique footnote format. For this option, you need to define the templates for how citations in footnotes should be formatted.

In the following example we modify the *Vancouver* output style.

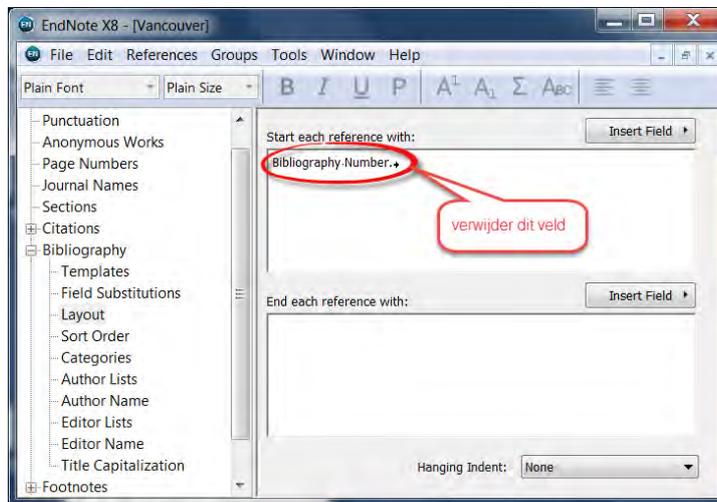
1. Choose *Edit > Output Styles > Open Style Manager*.
2. The *EndNote Styles* window is displayed.
Select **Vancouver**.
Click the *Edit* button.



3. Choose *File > Save as*.
Enter the new style name in the 'Style name' box.
Click the *Save* button.
4. Click *Templates* under the *Footnotes* heading.
Choose the format in the *Format citations in footnotes* box.
If you don't want the bibliography to appear at the end of your text, empty the *Include citations in bibliography* box.



5. Select *Layout* under the *Bibliography* item.
Remove the *Bibliography Number* field. The tab (↕) remains!



6. Click the *Close* button to close the *Styles* window.
7. Click *Yes* to save the changes to the endnote style.
8. Click the *Close* button to close the *Style Manager* window.

In Chapter 10.3.4 *Citing in footnotes or endnote* we apply this style to cite in footnotes.



10 Cite While You Write

Use Cite While You Write (CWYW) with Microsoft Word to easily and quickly cite references, figures, and tables, and create a paper with properly formatted citations, a bibliography, figures, and tables. Cite While You Write gives you access to EndNote references and formatting commands in Word with an EndNote X8 tab.

Many predefined Microsoft Word **manuscript templates** are supplied with EndNote to ease electronic submissions to publishers. 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, abstract page, graphics placement, and font type and size. Then, insert a citation into the document. You can even **insert figures and tables** found in EndNote references. A bibliography formatted according to any one of hundreds of styles is created. **Instant formatting** technology can automatically update your citations and bibliography as you write.

Cite While You Write uses Word field codes when creating your formatted citations. These hidden codes allow EndNote to format, remove formatting, and re-format citations within Word. These field codes include a *Traveling Library* (see 10.8 *Traveling Library*) of the references cited. The reference data saved with each citation includes the database name and location and all fields except *Notes* and *Abstract*. This allows you to use the document on a computer that doesn't contain a copy of your database. Because reference data is kept with each formatted citation, you can collaborate with other authors on a paper without each author having the same EndNote library.

10.1 Prior Settings

10.1.1 In EndNote

EndNote automatically checks for program updates when you open the application. However, you can manually update EndNote when program enhancements are available. To update your copy of the EndNote program, choose *Help > Check for Updates* in the menu.

10.1.2 In Microsoft Word

When working with large documents you could notice that after a certain time Word is slow to respond. We recommend to turn off settings that cause that delay.

10.1.2.1 Language settings

Before performing the steps described below, make sure that you make a backup copy of the document.

1. Press <Ctrl+A> to select the whole document.
2. Select the tab *Review*.
Click the *Set Language* button in the group *Proofing*.
3. Select the language.
4. Uncheck the *Detect Language automatically* box.
5. Click *OK*.

10.1.2.2 Word options

The settings listed below disturb the performance in Word, especially in long documents. Turn them off:

- **Check spelling as you type**
Choose *File > Options > Proofing*.
Uncheck the *Check spelling as you type* box.
- **Track changes**
Choose *Review > Track Changes*.
(If the functionality is active, the button is colored orange; click the button to turn off the functionality).
- **Show picture place holders**
Choose *File > Options > Advanced*
In the category *Show document content* check the *Picture place holders* box on.
As a result empty frames are displayed on the place of the figures. This allows you to quickly navigate within documents with figures.

In order to improve legibility during a work session it is suggested that the features explained below be applied in Word.

- **Field codes**
Choose *File > Options > Advanced > Document content*
Uncheck the *Show Field Codes* box.
- **Field Shading**
Choose *File > Options > Advanced > Document content*
In the *Field Shading* box, select *If selected* in the drop-down list.

10.1.2.3 Figures & images enlarge the document unnecessarily

If the document you are working in contains many images, it may be useful to compress the images.

1. Select the image.
2. Click the *Format* tab.
3. Click the *Compress* button.

10.1.2.4 Instant Formatting

By default, *Instant Formatting* is enabled the first time you insert a citation or format the bibliography. This is done by the *Instant Formatting* functionality. To enable or disable *Instant Formatting* in the current document:

1. Click the *EndNote X8* tab.
2. Click the *Turn Instant Formatting On* or *Turn Instant Formatting Off* button.



Note

When *Instant Formatting* is disabled, you can format the citations manually by clicking on the *Update Citations and Bibliography* button in the group *Bibliography*.



10.2 Manuscript templates

You can start a new Microsoft Word document based on predefined templates either from within EndNote or directly from Word. You can also copy and edit one of the predefined manuscript templates.

10.2.1 From Within EndNote

To create a document based on one of the predefined manuscript templates:

1. Start EndNote.
2. Choose *Tools > Manuscript Templates*.
3. In the *Manuscript Templates* dialog, select the template you want to use. (EndNote should automatically select the EndNote Templates folder)
4. Click the *Open* button.
This opens a new document in Microsoft Word that is based on the template file, and starts a manuscript template wizard to help you set up your paper.
5. Enter the information requested by the template wizard.
6. Click *Next* to continue providing information. On the final template wizard window, click *Finish* to close the wizard and start writing.

10.2.2 From Within Word

To use a manuscript template from within Word:

1. Start Microsoft Word.
2. Choose *File > New* (in the upper left corner).
3. In the *Templates* list, select *My Templates*.
4. The dialog *New* is displayed.
Click the EndNote tab and choose the template.
Click the *OK* button.

10.3 Inserting citations & figures

A citation is a brief bibliographic information in the body of your text that refers to a complete reference in the bibliography. This consists of a bibliography **number** or the **author and year** in parentheses. Citations can appear as either formatted or unformatted in a document.

By default, the *Instant Formatting* is turned on. This means, that each time you insert a citation it is formatted instantly and a bibliography is updated at the end of your document.

There are three ways to insert citations in your Word document and depending of the situation, they appear as either **formatted** or **unformatted** in your document:

- In the *Citations* group, click the upper part of the *Insert Citation*  button.
See chapter 10.3.1 *Insert Citation(s)*.
- In the *Citations* group, click the lower part of the *Insert Citation* button and select *Insert Selected Citation*.
See chapter 10.3.2 *Insert Selected Citation(s)*.
- Enter manually 'temporary citations' according to strict rules.
See chapter 10.3.5 *Citing manually*.



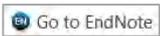
10.3.1 *Insert Citation(s)*

You can search for EndNote references and insert them without ever leaving Word.

1. Open the library that contain the references you wish to cite.
2. Open the Word document.
Position the cursor in the text where you would like to put the citation.
3. Click the *Insert Citation* button in the *Citations* group.
4. In the *Find* box, enter identifying text for EndNote to locate the appropriate reference.
Click the *Search* button.
5. EndNote compares the identifying text to your EndNote references and then lists the matching reference(s).
Highlight the appropriate references.
Click *Insert*.

Citations are inserted directly into your paper in the same font as the surrounding text. Once a citation is inserted, it contains complete reference information in hidden codes.

Note

- ♦ Instant Formatting is turned on by default. This means that each time you insert a citation it is formatted and a bibliography is updated at the end of your document.
- ♦ If your citations are not automatically formatted, and a bibliography is not updated each time you insert a citation, click the *Update Citations and Bibliography* button in the Bibliography group.
- ♦ The identifying text for EndNote to locate the appropriate reference could be an author's last name, a year, a keyword, a record number or any other combination of terms found in the reference.
- ♦ When you're working in Word, you can launch EndNote by clicking the  button.
- ♦ If you want to change the style or layout of your citations and bibliography click in the Style box in the Bibliography group and select the Output Style.

10.3.2 *Insert Selected Citation(s)*

You can mark any number of records in an EndNote library list and then insert those records at one place in your word manuscript. The selected citations can be inserted from EndNote or Word. To insert references selected in EndNote:

1. Open the Word document and position the cursor at the location where you would like the citation.
2. Click the  *Go To EndNote* button in the *Citations* group.
3. Highlight the desired reference(s) in your EndNote library.
4. Click the *Insert Citation* button on the EndNote toolbar.
5. Click *Insert Selected Citation(s)*.

10.3.3 *Insert Figures*

You can search EndNote references and insert a graphic or file from the Image field of a reference into your Word document. The Caption field (that appears directly under the Image field in a reference) allows you to easily search for images. Use this field for a short description of the image or file.



If you insert an EndNote image into a Word document with Cite While You Write, the corresponding caption appears either above or below the image in your paper (the placement is determined by the current output style). To insert a graphic or file that is stored in an EndNote reference:

1. Open the library that contains the figure you wish to insert.
2. Open the Microsoft Word document.
3. Position the cursor at the location where you would like to have the figure citation.
4. Click *Insert Citation* and then *Insert Figure* in the *Citations* group.
5. The *EndNote Insert Figure(s)* dialog appears.
In the *Find* text box, enter text to identify the reference that contains the image.
Click *Search*.
6. EndNote displays the Author, Year, Title and Caption field from each matching reference.
Identify and highlight the appropriate figure in the list.
Click *Insert*.

EndNote places an in-text figure citation at the cursor location and inserts and labels the figure itself.

Result

Dit is een voorbeeld¹⁻³ van een verwijzing⁴ naar een figuur (Table 1)

1. Billoski, T. V. *Introduction to Paleontology* (Institutional Press, New York, 1992).
2. Whitney, J. R., Billoski, T. V. & Jones, V. R. in *New Directions in Paleontology* (ed. Billoski, T. V.) 24-27 (Academic Press, New York, 1997).
3. Melosh, H. J., Schneider, N. M., Zahle, K. J. & Latham, D. Ignition of global wildfires at the Cretaceous/Tertiary boundary. *Nature* **343**, 251-254 (1990).
4. Schwartz, M. T. Evolving ecosystems: role in dinosaur extinction. *Nature* **12**, 16-17 (1976).

List of Tables

Table 1. Bird Evolution

The diagram illustrates the evolution of a wing through two main sections. The top section, 'EVOLUTION OF A WING', shows a sequence of six illustrations: Sinosauropteryx, Velociraptor, Unenlagia, Archaeopteryx, Eoalulavis, and Corvus (Crow). The bottom section, 'THE PATH TO BIRDS', shows a sequence of seven illustrations: Sinosauropteryx (Typical Theropod Dinosaur Arm), Velociraptor (Flexible Wrist), Unenlagia (Flapping Ability), Caudipteryx (Primitive Feathers), Protarchaeopteryx (Symmetrical Feathers), Archaeopteryx (Flight Feathers), Eoalulavis (First Alula), and Corvus (Crow) (Modern Wing).



Note

- The Instant Formatting that applies to bibliographies does not apply to figures. In-text figure citations are always formatted as you insert them, but if you move or delete a figure citation in your paper, you choose *Update Citations and Bibliography* in the *Bibliography* group on the EndNote tab.
- EndNote inserts the image itself, along with the caption, immediately after the paragraph that cites it. You can modify the output style to place figures and tables in lists at the end of the document, after the bibliography.
- Images found in the *Chart > Table* reference type are inserted into Word as tables, which are labeled and numbered separately from figures.

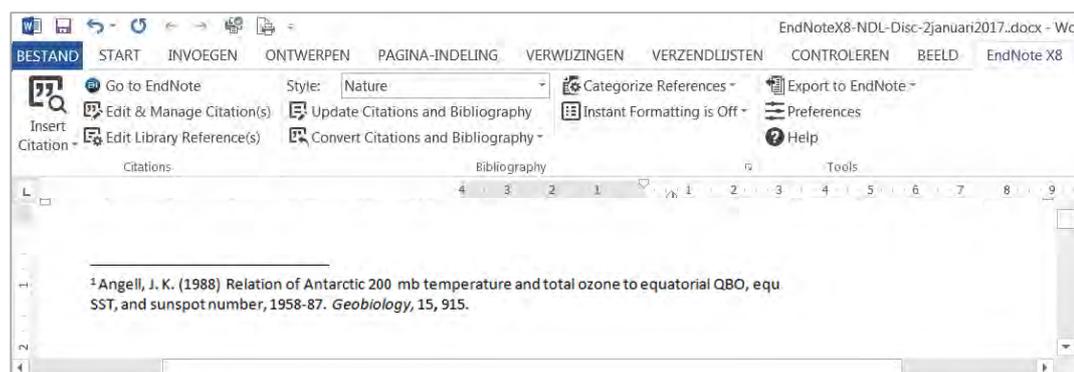
10.3.4 Citing in footnotes or endnotes

Once you have created a footnote or endnote in Word, you can cite references in that footnote or endnote just like you cite them in the body of the document. To cite a reference in a footnote (or endnote):

1. Click the *References* tab and click the *Insert Footnote* button in the *Footnotes* group.
2. Position the cursor in the footnote or endnote where you would like the citation(s) to appear.
3. Insert the citation as you normally would.

The selected output style determines how the citations in footnotes and endnotes are formatted. EndNote can format these citations as brief in-text citations or like complete references in the bibliography. It can also create a special format specific to footnotes or endnotes, including options like “Ibid.” and other variations of shortened references when a citation appears more than once in the footnotes or endnotes.

Result



10.3.5 Citing manually

10.3.5.1 Inserting according strict rules

Citations can appear as either **unformatted** or **formatted** in your Word document. An unformatted citation is a temporary placeholder, and does not reflect final output. Assuming that the **Instant Formatting is turned off** it may appear after you:

- *Insert Citation(s)*
- *Insert Selected Citation(s)*
- Drag-and-drop or copy and paste citations from EndNote to Word



- ◆ Unformat Citation(s) or
- ◆ Manually enter unformatted citations.

EndNote relies on these temporary citations to determine which references to include in the bibliography.

- ◆ The 'identifying text' is surrounded by *delimiters*, such as {braces} or [brackets]. You can change the settings in *Edit > Preferences > Temporary Citations*.
- ◆ Each unformatted citation contains information to find a unique, corresponding EndNote reference in the currently open library.
- ◆ An unformatted citation typically consists of the first author's last name, year, and the EndNote record number, with citation delimiters to identify the text:

For example: **{Volckaert, 2017 #13}**

or **{Volckaert, 2017 #13; Tuzgöl, 2017 #8}**.

- ◆ The identifying text may contain a prefix or a suffix.

For example: **{See \Volckaert, 2017 #13}**

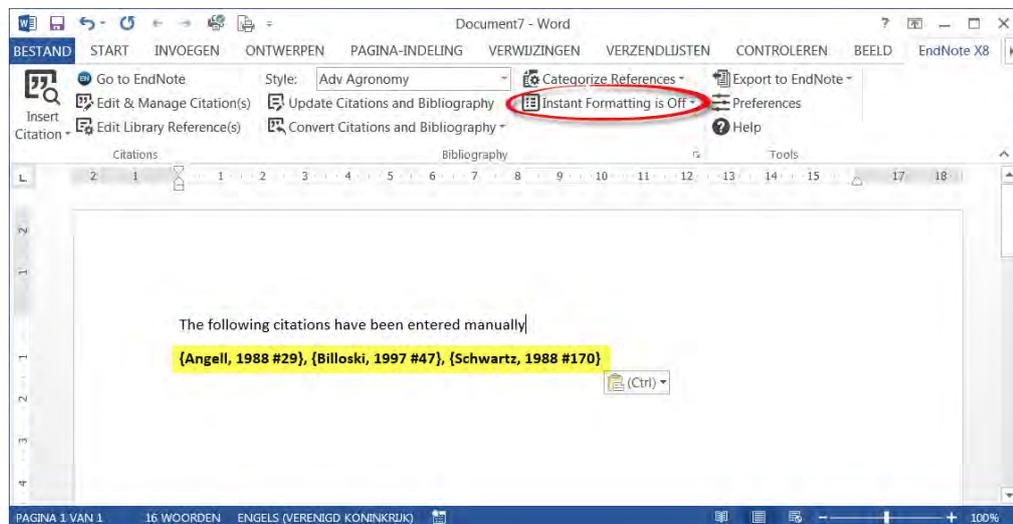
For example: **{Tuzgöl, 2017 #8 p.120}**

Note: If you have Instant Formatting turned on, you may never see an unformatted citation. Instant Formatting is turned on by default. To turn it off, click the *Instant Formatting* button in the *Bibliography* group on.

In the example below, the *Instant Formatting* was disabled.

1. Enter the 'temporary citations'.

{Angell, 1988 #29}, {Billoski, 1997 #47}, {Schwartz, 1988 #170}



2. Click the *Update Citations and Bibliography* button in the *Bibliography* group. All the 'temporary citations' are converted into formatted citations. The formatting is reflected by the final output style.

10.3.5.2 Copying and pasting

Assuming that the *Instant Formatting* is turned off 'Unformatted' or 'Temporary' citations appear also after following actions:

1. Select the references in EndNote and press <Ctrl+C>.
2. Go to Word and press <Ctrl+V>.

The references appear as 'unformatted' or 'temporary' citations.

Drag-and-drop citations from EndNote to Word also results in temporary citations.



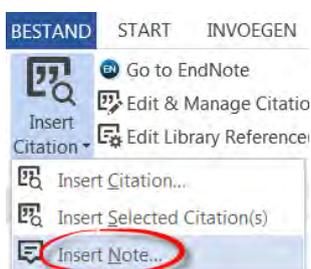
10.3.6 Inserting Note(s) in the list of References

Some journal styles (such as Science) require that you include notes along with the list of works cited at the end of the document. In such a system, notes are numbered just like citations, and are included in the reference list in order of appearance, along with bibliographic references.

Including notes in this way makes sense only when you are formatting your paper with a **numbered style** (not an author-date style).

To insert text as a numbered note in the reference list:

1. Choose a *Numbered* style in the Output Style pull down list.
2. Position the cursor at the location in your text where you would like the number indication the note.
3. Click the *Insert Citation* button and then *Insert Note*.



4. The *EndNote Insert Note* dialog is displayed.
Type the note into the text box (there is no limit on the amount of text).
Click *OK*.

When the paper is formatted by EndNote using a numbered style, the note text is assigned a number and listed along with the references at the end of the paper.

Result



Note

- This feature requires that a numbered style be used for formatting; otherwise, the note appears as text in the body of your paper.
- Enter text only. Do not enter graphics, equations, or symbols.
- Do not use the temporary citation delimiters (by default curly braces{ }) as part of the text of the note. Other markers, such as the record number marker (#), the prefix marker, and the multiple citation separator may be used.
- Notes cannot be combined with regular bibliographic citations within the same set of delimiters (such as parentheses or brackets). They must be cited separately – each in its own set of delimiters.



10.4 Multiple bibliographies in single document

By default, EndNote creates a single bibliography at the end of your Word documents. However, you may want to create a separate bibliography for each section (or chapter) in your document. EndNote can format each section individually, but you will have to

- Break your Word document into sections.
- Modify the output style as needed.

10.4.1 Break your Microsoft Word document into sections

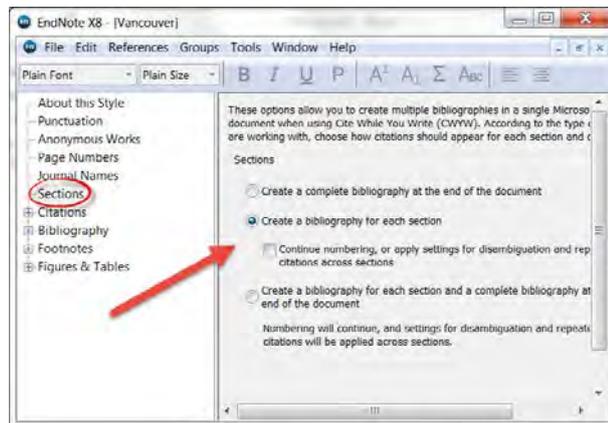
To break your Microsoft Word document into sections, proceed as follows:

1. Select the *Page Layout* tab.
2. Click the *Breaks* button.
3. Select one of the options: *Next Page*, *Even Page*, *Odd Page*.

10.4.2 Modify the Output Style

Proceed as follows:

1. choose *Edit > Output Styles > Open Style manager*.
2. Click on the *Sections* panel. Select one of the three options.
3. Save your changes and close the Output Style.



Note

- If you want to use a predefined style that formats sections, try *APA 5th (sections)* or *Chicago 15th B (sections)*. These styles are already defined to format a bibliography for each section, and do not require modification.
- EndNote will always insert a blank line between the final text of each section and the reference list for that section.
- When you format a reference list at the end of each section, the bibliography title will be used from the *Layout* tab of *Configure Bibliography* dialog. If you do not want a title for each section bibliography, make sure the *Bibliography Title* text box on the *Layout* tab is empty.
- If you have instructed the output style to *Create a bibliography for each section and a complete bibliography at the end of the document*, but you have only one section in the Word document, a complete bibliography will appear twice — once for the end of the section, and once as a complete bibliography for the entire document.



10.5 Editing citations and references

10.5.1 Editing Citation(s)

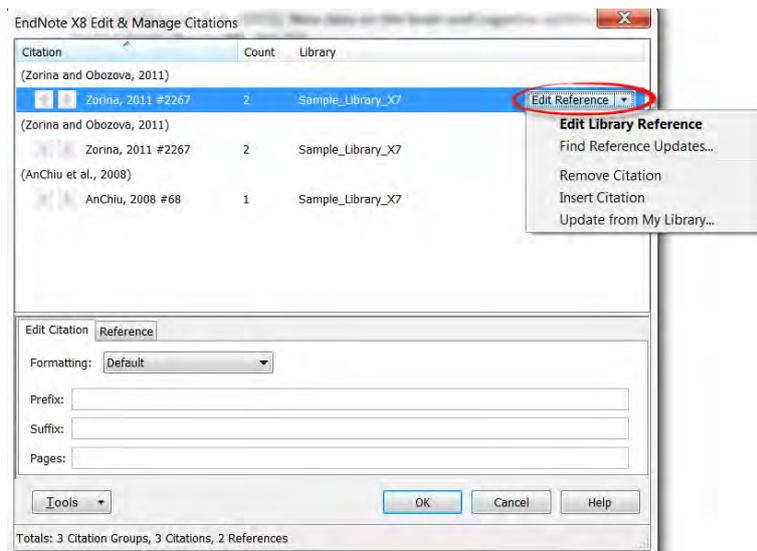
Once you have inserted and formatted a citation, you should not edit it directly. If you do, direct edits are lost the next time EndNote formats the bibliography.

You can almost always get EndNote to format your citations exactly to your specifications by editing the style, the EndNote reference, or the citation as described below (**APA** is the applied style). To edit a formatted citation:

1. Click on the citation you wish to change.
2. Click the *Edit & Manage(s)*  **Edit & Manage Citation(s)** button in the *Citations* group.



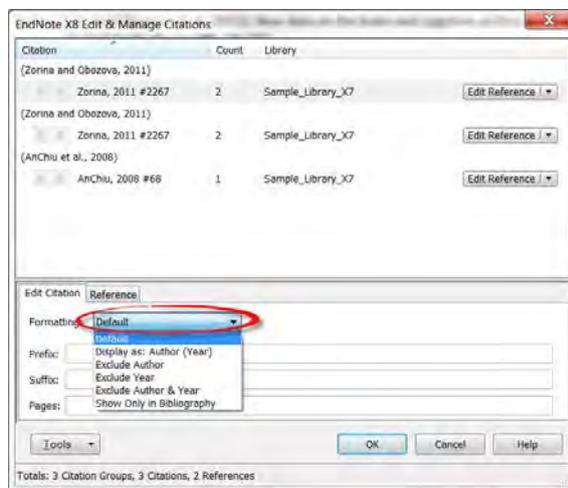
3. All of the cited references in the document are listed at the upper side of the dialog. The citation you want to edit is highlighted.
4. Click on the *Edit Reference* button next to the highlighted reference and make any of the following changes:
 - ♦ *Edit Library Reference*: use this to edit the reference in your EndNote library.
 - ♦ *Find Reference Updates*
 - ♦ *Remove Citation*: use this to delete the highlighted citation.
 - ♦ *Insert Citation*: use this to add another citation within the same set of delimiters.
 - ♦ *Update from My Library*



5. In the *Edit Citation* tab, click in the dropdown list and make the following changes:
 - ♦ *Default Format*: display the citation and format it as defined by the currently selected output style.



- ◆ *Display as: Author (Year)*: display both the author name and the year in the highlighted citation. This feature does not apply when editing a citation in a footnote.
 - ◆ *Exclude author*: omit the author name from the formatted citation.
 - ◆ *Exclude year*: omit the date from the formatted citation.
 - ◆ *Show only in Bibliography*: display the selected citation only in the bibliography, not in the body of the paper.
6. In the three following textboxes you can enter information:
- ◆ *Prefix*: Enter text here to print immediately before the citation text (i.e.: **See** (do not forget the space!))
 - ◆ *Suffix*: Enter text here to print after the citation text (i.e.: **:15-20** (spaces are significant))
 - ◆ *Pages*: Enter page numbers here to print as *Cited Pages*. To print, the field must be listed in the citation template or footnote template of the output style.

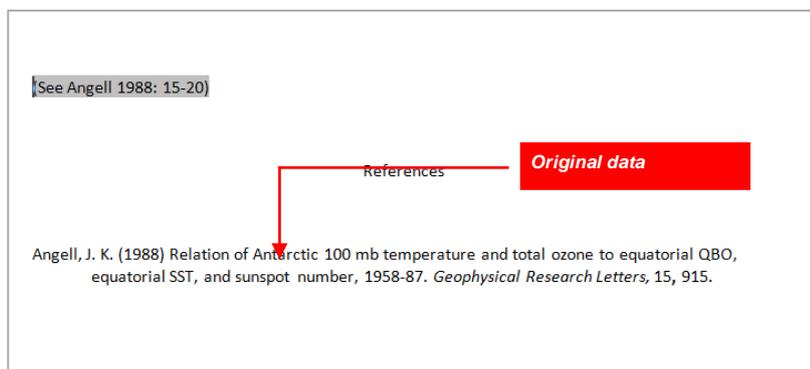


7. Click *OK*.

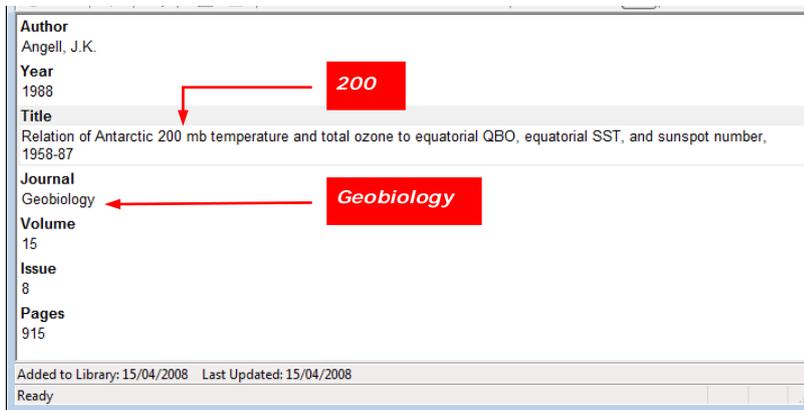
10.5.2 Editing library Reference(s)

You can quickly jump from a bibliographic in-text citation in your word document to the corresponding EndNote reference and make some editing:

1. Make sure the EndNote library is open.
2. Highlight or click in the citation in your Word document.

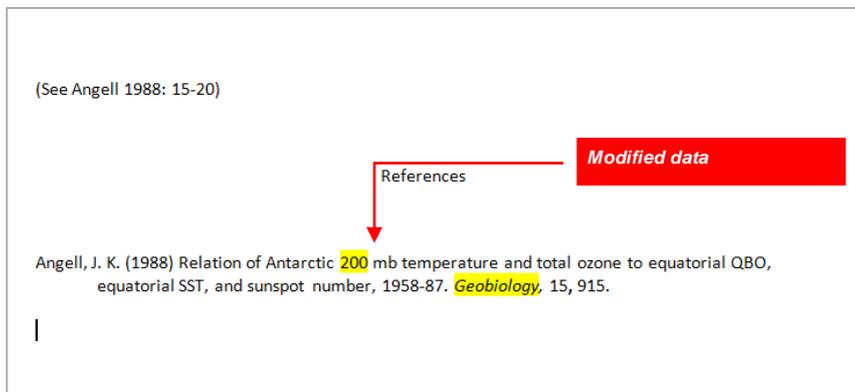


- Click the *Edit Library Reference(s)*  button.
- EndNote opens the corresponding reference for editing. Make some changes:
Title: '100 mb' becomes '**200**'
Journal: 'Geophysical Research Letters' becomes '**Geobiology**'
 Close the window; the reference will be saved automatically.



- Activate the Word document.
- Click the *Update Citations and Bibliography* button in the *Bibliography* group on the EndNote tab.

Result



Note

- EndNote will not be able to make the update if the library is not open during formatting.
- The author's last name and the publication year are both used to identify a reference, so changes to these items in an EndNote reference are **not** reflected in the in-text citation.



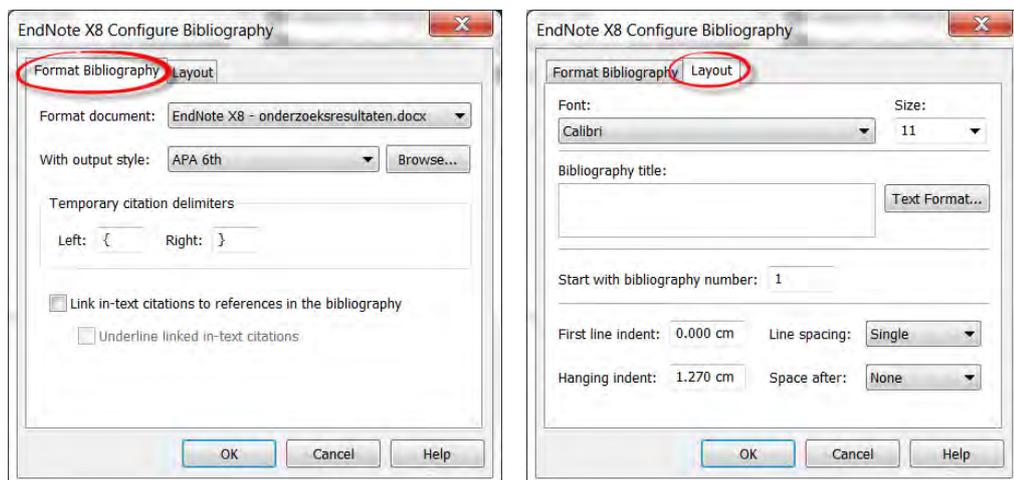
10.6 Formatting citations and bibliography

10.6.1 Format Bibliography

You may be halfway through inserting citations, or you may have finished writing your paper. You may have instant formatting enabled, or you may have manually inserted citations with formatting disabled. It doesn't matter. As long as you have citations entered in your document, you can format your paper at any time. You can reformat after adding more citations or to change the style or layout settings.

The first time a citation is formatted, the corresponding EndNote library must be open. After that, EndNote can use the *Traveling Library* for reference information. To format citations and generate a bibliography:

1. Click the corner arrow dialog launcher in the *Bibliography* group.
2. The *EndNote Format Bibliography* dialog is displayed.
Change or verify the settings on the different tabs.
Click *OK*.



10.6.2 Remove Field Codes

You may need to remove Cite While You Write field codes in order to share your document with a publisher or colleague.

- ♦ Removing field codes means deleting Word's Cite While You Write field codes and saving the formatted citations and bibliography as text. This removes **only Cite While You Write field codes**, and **not all other Word field codes**.
- ♦ When field codes are removed, in-text figure citations are no longer linked to an EndNote reference or to the figure list. In-text figure citations become plain text. Pictures in the figure list become GIF files as though they were copied and pasted into the document.
- ♦ Because EndNote and Cite While You Write cannot reformat or unformat your paper once field codes are removed, the *Remove Field Codes* command makes a *copy* of your document without codes.



To remove field codes and save the formatted citations and bibliography as text:

1. Open your formatted Word document.
2. In the *Bibliography* group, select *Convert Citations and Bibliography* and then *Convert to Plain Text*.
A copy of the document without field codes appears in a new document window.
3. Click the Office button and choose *Save*.

Word saves your document without embedded formatting codes. You can submit your paper to a publisher or share your final paper with a colleague using a different Word processor.

10.7 Cite While You Write Preferences

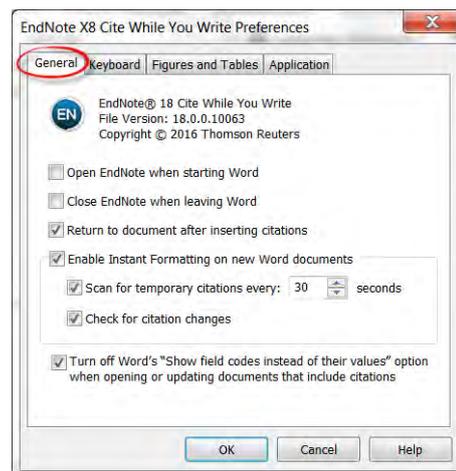
You can access the *Cite While You Write* preferences in one of the two ways:

- In **Word**:
Select the EndNote tab and click the  button.
- In **EndNote**:
Choose *Tools > Cite While You Write* menu.
Select *CWYW Preferences*.

10.7.1 General

General preferences are useful when you always use your EndNote library along with your Word processor.

- *Open EndNote When Starting Word*
Check or uncheck this item.
- *Close EndNote When Leaving Word*.
Select this option to close EndNote when you leave Word. This option does not work if EndNote was already open before you started Word
- *Return to Document After Inserting Citations*
Select this item to make your document the active window after inserting citations with EndNote's *Insert Selected Citation(s)* command. If this preference is turned off so that the document remains in the background, you will not see the inserted citation in the document until the document becomes the active window.
- *Enable Instant Formatting on new Word documents*
This option turns Instant Formatting on or off for new Word documents. When you enable Instant Formatting, you can also determine how often EndNote scans for temporary citations and whether it checks for citation changes in existing citations.
 - *Scan for temporary citations* turns on scanning of temporary citations. This finds and formats all citations, including those you may have entered manually. You can select how often EndNote scans your document.
 - *Check for citation changes* turns on background scanning that looks for citation changes.
- *Turn off Word's "Show field codes instead of their values" option when opening or updating documents that include citations*:
EndNote uses extensive Word field codes in order to identify and format citations. When field codes are displayed, your document can look confusing!



10.7.2 Keyboard

Keyboard shortcuts for EndNote's Cite While You Write commands are available in Word. To add or change a keyboard shortcut:

1. From the EndNote tab in Word, select *Preferences*.
2. Select the *Keyboard* tab.
3. From the list of commands, select the command for which you would like to add (or change) a shortcut.
4. Under *Press new shortcut key*, enter the new shortcut key combination on the keyboard.
5. Click *Assign* to assign the new shortcut.

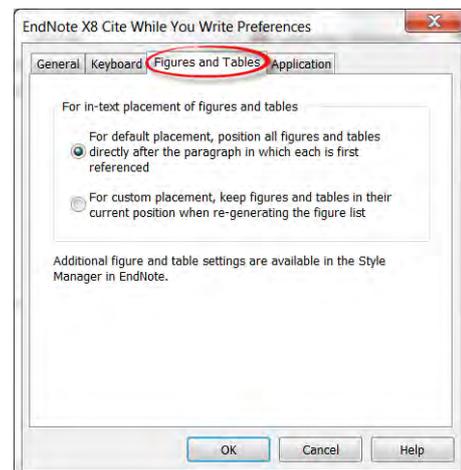


Follow the same steps to remove an assigned shortcut key, except click *Remove* instead of *Assign*. Click *Reset All* to remove custom key assignments.

10.7.3 Figures and Tables

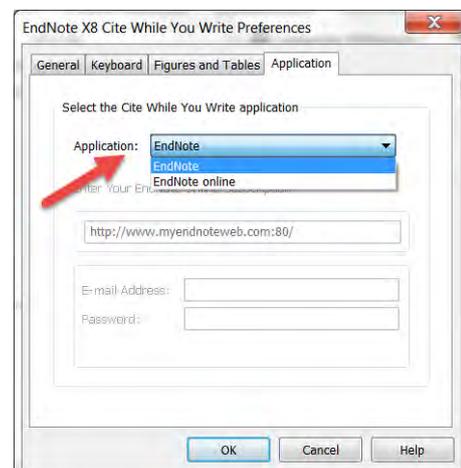
The figures and tables settings in Microsoft Word override settings from the current output style. If your output style is set to print figures and tables in a list at the end of the document, the settings on this tab are ignored. However, if your output style is set to print figures and tables in-text, you can use this tab to override settings when you have moved figures around in your document and want to retain their placement. To customize the in-text placement of EndNote figures and tables in Word.

1. From the EndNote tab in Word, select *Preferences*.
2. Select the *Figures and Tables* tab.
3. Select the appropriate radio button to:
 - Place each figure or table directly after the paragraph where it is first referenced, or
 - When re-generating figures, keep each figure or table in its current position. This allows you to move images around in your document and have them stay there when you *Generate Figure List* again.



10.7.4 Application

Use the *Application* tab in Word to indicate which version of EndNote to use when you use *Cite While You Write*. **EndNote**, your desktop version or **EndNote online**, the online Web version of EndNote.



10.8 Traveling Library

A *Traveling library* is a function that stores bibliographic data from the inserted references in a Word document in the form of embedded field codes. The first time a citation is formatted the corresponding library must be open. Later when any reformatting takes place the bibliographic data is captured from the traveling library.

10.8.1 Export Traveling Library

There may be occasions where you want to copy all of the references used in a Microsoft Word document to an EndNote library. Perhaps you received only the formatted Word document from a colleague, and would like to create EndNote references to use later. This is possible, because the embedded field codes may be exported from a Word document to an EndNote library. To export, proceed as follows:

1. Open your Word document.
2. Click the *Export Traveling Library* button in the *Tools* group.
3. In the *Export Traveling Library* dialog, select either:
 - an existing EndNote library
 - a new EndNote library

Note

- We recommend that you export to a *new* EndNote library, so you can review the records before adding them to an existing library.
- When you use the *Export > Import Traveling Library* commands, the exported references are renumbered and do not retain their original reference numbers.
- The reference data saved with each citation includes all fields except *Notes*, *Abstract*, *Image* or *caption*.

10.8.2 Sharing Word documents

Sometimes you have to send a document to a colleague for proofreading or adding comments. The best format to use depends on how the colleagues work together and which version of EndNote and respectively Word are used. The best guarantee for a reliable exchange of information is when all parties use the same version of both software.

If the receiver uses EndNote but not the same EndNote library as the sender it is quite safe to send the formatted Word document and benefit from the simplicity of the Traveling Library.

Should the receiver, who does not use EndNote, edit the text it is far safer for the sender to convert in Word the *Formatted Citations* into *Unformatted Citations*.



11 Citing in PowerPoint

After an EndNote installation the ribbon displays an EndNote tab. Use the commands in the PowerPoint tab to easily and quickly insert *citations* and *references* in your PowerPoint slides. EndNote formats citations and references based on the rules defined for the selected output style.

- ♦ **Insert Citation**
Select this option to search for and insert citations in your document. Selecting this option opens the Find & Insert My Citations dialog.
- ♦ **Insert Selected Citation(s)**
Select this option to insert selected citations from your open EndNote library. First, open EndNote and select the needed references from the Library reference list. Return to your PowerPoint presentation and click this button. EndNote inserts the citation for selected reference where you position your cursor.
- ♦ **Insert Reference**
Select this option to search for and insert references in your document. Selecting this option opens the Find & Insert My References dialog.
- ♦ **Insert Selected Reference(s)**
Select this option to insert selected references from your open EndNote library. First, open EndNote and select the needed references from the Library reference list. Return to your PowerPoint presentation and click this button. EndNote inserts the selected references where you position your cursor.
- ♦ **Output Styles Menu**
Use this menu to select an output style from the Style menu before you begin inserting citations and references in your document.
- ♦ **Go to EndNote Command**
Select this option to open EndNote if it is not currently open. If EndNote is already open, this option brings EndNote to the front of the screen.



⊠ Note

- ♦ Cite While You Write in PowerPoint has not the same extensive features and options such as in Microsoft Word. References in PowerPoint will not be updated, after you choose a different Style.
- ♦ We recommend that you select a style from the Output Styles menu before you begin inserting citations and references in your document. Please remember that selecting a new output style will not update the formatting of citations and references already inserted into the document.
- ♦ This feature is compatible with Microsoft PowerPoint versions 2007, 2010, 2013 and 2016.

12 EndNote Online

12.1 Introduction

EndNote Online is the online version of EndNote. The application is designed to help students and researchers through the process of writing a research paper. EndNote can be used from any location; very interesting for mobile users. EndNote Online is still under development and is certainly not a full replacement of EndNote Desktop.

EndNote Online can be used from *EndNote desktop*, from *Web of Science* or directly from the *Online version* (as a basic user; interesting for students). Depending on the EndNote Online version, there are more or less features available. To create an account, cfr infra.

Note

- ♦ If you have an EndNote licence, your EndNote online subscription is valid for two years from the date after you register and activate your account.
- ♦ With EndNote Online you have:
 - unlimited reference storage
 - max. 5 GB data in attach
- ♦ Filters, Connection Files and Output Styles can not be customized in EndNote Online.
- ♦ Images and tables can not be exported to an Online library.
- ♦ Formatting and fonts applied on individual references disappear after exporting them.
- ♦ If you have already worked with EndNote, you can export references from EndNote to the online library, and vice versa.
- ♦ When exporting references from one library to another library if duplicates are found, the references are overwritten in the target database.
- ♦ The Sync process allows you to synchronize the references in your EndNote desktop library with the references in your EndNote online library.
- ♦ Sync works with only one library and only one EndNote online account (the library which is displayed in *Edit > Preferences > Sync*). More info *5.9 Syncing*.
- ♦ You cannot synchronize an EndNote desktop library with your EndNote online library when you are in *Online Only* mode
- ♦ EndNote online libraries are stored on an American server. If the server goes down, you won't have access to your EndNote online library. If the server is overloaded the application will work very slow.

12.2 Compatibility and requirements

12.2.1 **Browser requirement for Web Application***

- ♦ Microsoft Internet Explorer® 8.x (32-bit) or later
- ♦ Firefox® 27 or later
- ♦ Safari® 5.0 or later
- ♦ Chrome® 31 or later

12.2.2 **Browser requirement for Web Capture****

- ♦ Add-on*
- ♦ Microsoft Internet Explorer 8.x (32-bit) or later
- ♦ Firefox® 27 or later
- ♦ Bookmarklet*
- ♦ Microsoft Internet Explorer 8.x (32-bit) or later
- ♦ Firefox 27 or later
- ♦ Safari 5.0 or later
- ♦ Chrome 31 or later

Note

- * Valid for Macintosh and Windows browsers, except Internet Explorer.
- ** Cookies and JavaScript must be turned on.

12.3 **Registering**

If you want to work with EndNote Online, you must first register and have an EndNote online account. Registration is fast and easy and activates your two-year EndNote online account. Depending on the version (Desktop, Web of Science, Online) follow the procedure below:

12.3.1 **EndNote desktop**

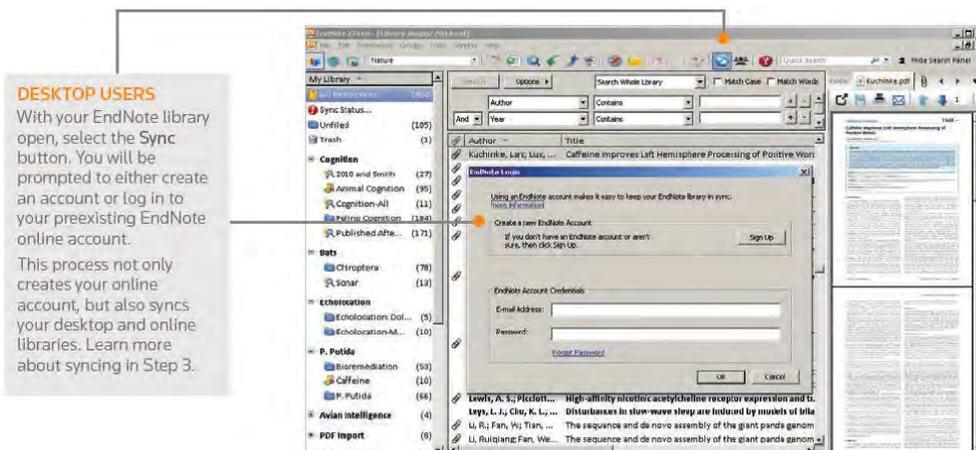
If you have an EndNote desktop licence, you can create your two-year EndNote account to get the latest features and enable Sync:

1. Open the EndNote library.
2. Choose *Edit > Preferences*.
3. Select the *Sync* category.
4. Click the *Sign Up* button to go to a User Registration dialog.
Enter your subscription details in the required fields:
 - **E-mail Address**: enter your e-mail address
 - **Password**: type your passwordSelect the *Sync Automatically* check box if you want EndNote to automatically begin the Sync process every 15 minutes (background processing).
Sync works with only one library (the library which is displayed in the *Sync this EndNote Library* box) and only one EndNote online account
5. Click the *I Agree* button to complete the registration process and to begin synchronizing your EndNote online library with your EndNote desktop library.
Click *OK*.

There is another way:

1. Click the *Sync* button.
2. Create an account or
Log in to your preexisting EndNote online account.





DESKTOP USERS
 With your EndNote library open, select the Sync button. You will be prompted to either create an account or log in to your preexisting EndNote online account.
 This process not only creates your online account, but also syncs your desktop and online libraries. Learn more about syncing in Step 3.

12.3.2 Web of Science

You can work with EndNote Online after registering in *Web of Science*:

1. Go to www.webofknowledge.com and log in.
2. Click the *EndNote* link from the top menu bar to open your EndNote library.

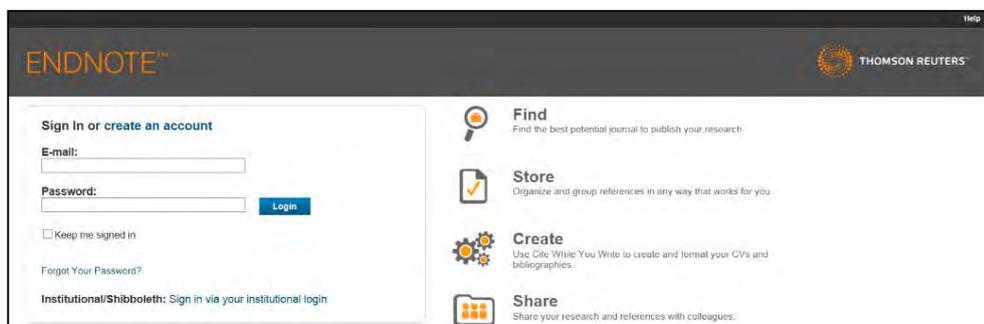


WEB OF SCIENCE USERS
 Sign in to the Web of Science and click the EndNote link from the top menu bar to open your EndNote library.

12.3.3 EndNote online

If you do not have EndNote desktop or access to *Web of Science*, you still can work in EndNote online as a basic user:

1. Go to my.endnote.com
2. Sign up for a free account or if you have already one:
 Type your e-mail address and password and click the *Log in* button.
 After registration you are an 'EndNote basic user' (see table below).



In the table below the different EndNote online versions are displayed.



	Reference storage	File attachment storage	Cite While You Write (Microsoft Word)	Bibliographic styles	Web of Science data and links
EndNote basic users	50,000	2GB	Limited Feature Set	21	–
EndNote basic & Web of Science users	50,000	2GB	Limited Feature Set	3300+	√
EndNote desktop users	Unlimited	Unlimited	Full Feature Set	3300+	–
EndNote desktop & Web of Science users	Unlimited	Unlimited	Full Feature Set	3300+	√

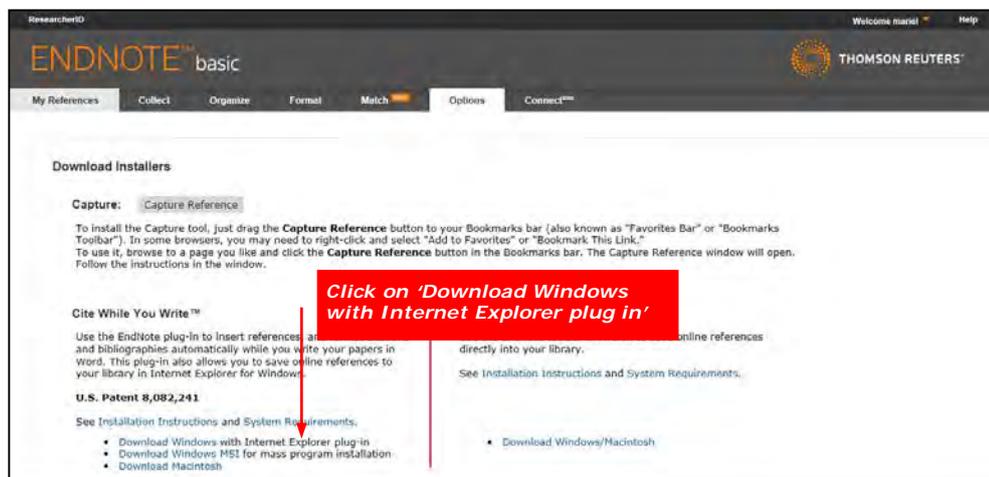
12.4 Plug-in installation

In *EndNote online* you can use *Cite While You Write* to cite in your documents. You can also easily import references from many data providers using the direct export helper application extension. Therefore you have to install two plug-ins:

- ◆ Capture plug-in for Internet Explorer or Firefox
- ◆ Cite While You Write for Microsoft Word plug-in

To install the plug-ins, proceed as follows:

1. Go to www.myendnoteweb.com and log in.
2. Click the *Options* tab in the menu.
3. Click on *Download installers* and follow the steps in 12.4.1 and 12.4.2.



12.4.1 Capture Reference tool

The *Capture Reference Tool* allows you to search and import references from online resources that do not have *Direct Export* buttons. To install the *Capture Reference tool*:

1. Click on the link *Download Windows with Internet Explorer plug in*.
2. Click the *Run* button to install the tool.

After installing the plug-in, two icons are displayed in the Explorer bar. If it is not visible, choose *View > Toolbars* in the menu and check *EndNote online*.



Now you can use the *Capture* button to import references from online databases that do not have *Direct Export*.



12.4.2 *Cite While You Write*

The *Cite While You Write* plug-in links your online library to Microsoft Word which means that you can insert references from your EndNote online library into your Word document, even if EndNote is not installed. After installing the plug-in, Word displays a small toolbar.

Note

If you are using EndNote you do not need to install the Cite-While-You-Write plug-in because it is already included.

12.5 Working with an online library

12.5.1 *Add References to your online library*

There are different ways to add references to your online library:

- ♦ By syncing with the desktop
- ♦ Direct export
- ♦ Capture (see 12.4.1)
- ♦ Online Search
- ♦ Manual adding
- ♦ Import Text File

See *Quick Reference Guide* for the procedure.

<http://endnote.com/sites/en/files/m/pdf/en-online-qrc.pdf>

12.5.2 *Organize and share your references*

A good management of your library is very important. Moreover, a good structure ensures that you will not lose time searching. So, create groups, eliminate duplicates regularly and share references with other EndNote users.

Detailed information can be found in the *Quick Reference Guide*.

<http://endnote.com/sites/en/files/m/pdf/en-online-qrc.pdf>

12.5.3 *Cite While You Write*

If you want to work with *Cite While You Write* you first have to install the plug-in (See 12.4 *Plug-in*). Using *Cite While You Write*, you can instantly insert references and format citations and bibliographies while you write your papers in Word. *Cite While You Write* is compatible with EndNote Online and Desktop.

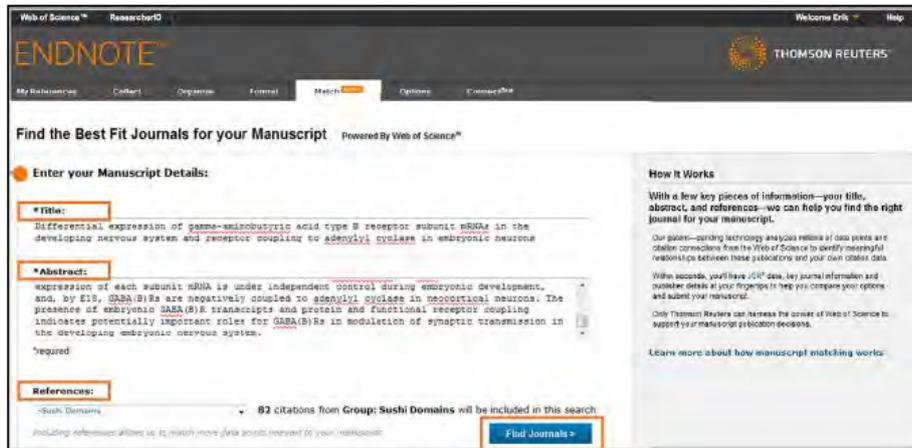
12.5.4 *Match Manuscript*

Use *Match Manuscript* to make a more informed decision about the best potential journals for your manuscript. With a few key pieces of information – your title, abstract, and references – you'll have JCR data, key journal information and publisher details at your fingertips to help you compare your options and submit your manuscript. To use *Match Manuscript* follow these steps:

1. Click the *Match* tab.
2. Enter the title and abstract of your manuscript.
3. Select the EndNote group holding your references from the drop-down (optional)



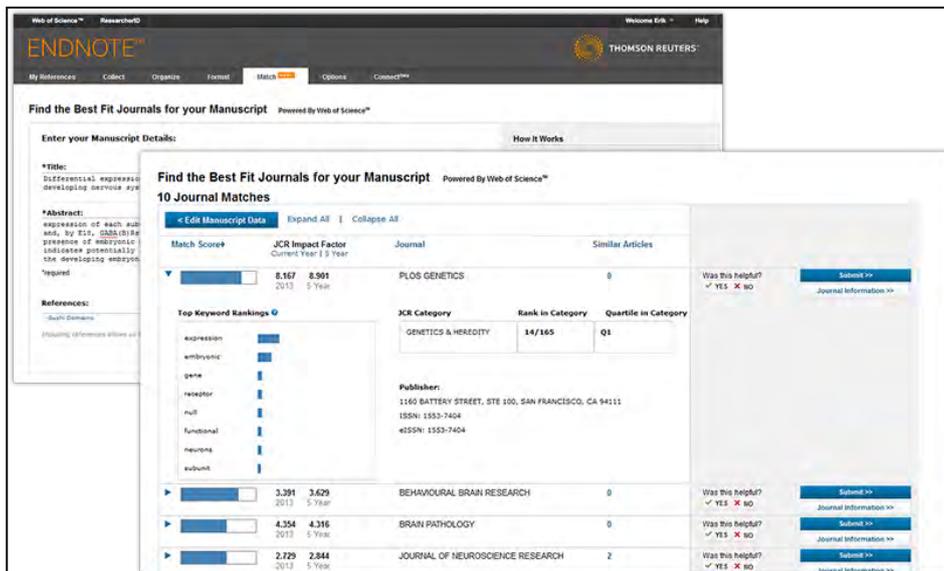
4. Click *Find Journals*.



EndNote displays a list with the following results:

- ◆ Match Score
- ◆ JCR Impact Factor
- ◆ Journal
- ◆ JCR Category
- ◆ Rank in Category
- ◆ Quartile in Category
- ◆ Link to journal's website
- ◆ Publisher

Choose one of the proposed journals and send your publication to the journal that best matches your subject and references.



More info: <https://researchsoftware.com/nl/manuscript-matcher?product=186>



12.6 Comparison EndNote/EndNote Online

Source: <https://researchsoftware.com/compare-endnote-versions?product=160>

Online	X7
Synchronize EndNote references and groups across desktop, online and iPad®	✓
Background syncing	✓
Install and sync libraries across Windows® and Mac® platforms	✓
Free 2-year access to my.endnote.com with advanced features	✓
File attachment storage	Unlimited
Find full text & PDF auto-import	
PDF auto-import folder	✓
Improved Quick Search with multi-phrase search of all fields, including PDF full text and notes	✓
Automatically create reference groups when importing folders and subfolders of PDF's	✓
Open separate PDF annotation/reference window with a button	✓
Built-in PDF viewer with annotation tools	✓
One-click Find Full Text with OpenURL and ezProxy support	✓
Customizable features	
Personalize display of ratings and read/unread status	✓
Choose how you'd like your PDFs renamed in your library	✓
Optimize screen layout options for widescreen or traditional monitors	✓
Make field substitutions in styles	✓
Options when saving a compressed copy of library	✓
Advanced features	
Free library sharing, unlimited library size, unlimited cloud storage	✓
Category bibliography options in Cite While You Write for Microsoft Word	✓
Citations and references in PowerPoint (Windows)	✓
Cite While You Write support for Apache Open Office	✓
Hyperlink in-text citations	✓
Multiple bibliographies in a single document	✓
Auto-reference with redlines	
Reference types for podcast, interview and press release	✓
Automatically find reference updates	✓
Quick Edit tab	✓



13 Help & Support

- ◆ **Help**

Choose *Help > Contents* or
Press the **F1** key on your keyboard.

- ◆ **EndNote X8**

- ◆ *Homepage*
www.endnote.com
- ◆ *Getting Started Guide*
The *Getting Started Guide* can be found as a PDF file in the EndNote X8 program file or on the link below
https://researchsoftware.com/sites/researchsoftware.com/files/files/product_attachments/endnote_X8_guide_full_windows_0.pdf
- ◆ *Quick Reference Guide*
<http://endnote.com/sites/en/files/m/pdf/enX8-win-qrg.pdf>
- ◆ *EndNote Tutorial*
<http://endnote.com/training>
- ◆ *EndNote support*
<http://www.endnote.com/support>
- ◆ *EndNote Community*
<http://endnote.com/community>
- ◆ *FAQ, Updates of Output Styles, Import Filters, Connection Files ...*
<https://researchsoftware.com/nl/search/node/output%20styles>
or
<http://endnote.com/downloads>
- ◆ *Useful links*
<https://researchsoftware.com/nl/thomson-reuters/endnote>

- ◆ **EndNote Online**

- ◆ *Homepage*
<https://www.myendnoteweb.com>
- ◆ *Quick Reference Guide*
<http://endnote.com/sites/en/files/m/pdf/en-online-qrc.pdf>
- ◆ *Table of Contents*
http://www.myendnoteweb.com/help/en_us/ENW/help.htm

- ◆ **Licensed distributor Benelux: DISC**

www.researchsoftware.com
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