



THOMSON REUTERS

ENDNOTE®

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Getting Started Guide

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www.endnote.com/training

EndNote®

Version X5 for Macintosh and Windows

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Notice regarding legal use of downloaded reference data

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

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About this Guide

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

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

Introduction: Welcome to Thomson Reuters EndNote X5

EndNote—your complete reference solution!

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

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

See “What’s New in EndNote X5” on page 9 for a list of the most recent features added to EndNote.

For late-breaking news and updates, please go to:
<http://www.endnote.com/support>.

About the Demonstration Version of EndNote and the EndNote Viewer

If you are working with the demonstration version of EndNote, you have 30 days after you first use the program to evaluate EndNote and all of its features. After those 30 days are up, the

demonstration version reverts to a feature-restricted EndNote Viewer.

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

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

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

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

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

Would you like to activate the full version of EndNote?

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

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

About this Getting Started Guide

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

This guide assumes that you know how to use your Macintosh or Windows operating system and your word processor. For help on these topics, consult the documentation that comes with these product.

Because this guide serves both Macintosh and Windows users, screen representations alternate between the Macintosh and

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

Often there is more than one way to select a command in EndNote. A single command may be available from one of the main menus, from a context-sensitive Control+click (Macintosh) or right-click (Windows) menu, from a toolbar, or with a keyboard command. In most cases, this manual gives instructions for selecting commands from the main menus. If a menu command has a keyboard equivalent, the keyboard command appears next to the menu item.

Customer Services

Register Your Copy of EndNote

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

Registered users receive:

- ◆ Free technical support
- ◆ Special upgrade offers
- ◆ Notification of new EndNote versions that are compatible with the latest version of your word processor

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

EndNote Online Help

Online Help: From EndNote's Help menu, select EndNote Help (Macintosh) or Contents (Windows) to view the various topics. For context-sensitive help, click the Help or ? button found on various windows and dialogs or press the F1Help key on your keyboard.

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

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

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

Customer Service

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

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

Sales Information

Phone: 1 800 722 1227 (Toll Free)

Phone: 760 438 5526 (country code is 01)

Fax: 760 438 5573 (country code is 01)

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

Customer Support (Orders, Billing, and Shipping)

Phone: 800 336 4474 (country code is 01)

Fax: 215 386 2911 (country code is 01)

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

Support

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

For web/email or phone contact, including hours and holiday closures, please go to:

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

Technical support tips are also available from the www.endnote.com/support Web site and the EndNote Discussion Forum.

International Customer and Technical Support

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

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

Online Support

EndNote Web Site

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

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

EndNote Discussion Forums

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

Join the EndNote social network at:

- ◆ www.facebook.com/EndNote
- ◆ www.twitter.com/EndNoteNews
- ◆ www.youtube.com/endnotetraining

ADA VPAT

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

Visit our Web site at <http://www.endnote.com/vpat> to access the VPAT (Voluntary Product Accessibility Template) document that describes the accessibility features that address the Section 508 Standards.

The VPAT is an informational tool developed by industry and government to help facilitate the understanding of compatibility issues under Section 508.

What's New in EndNote X5

The current release of EndNote includes the following new features:

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

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

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

Chapter 1: Macintosh EndNote Installation

Before You Install EndNote

Please read this section before you proceed with the installation.

If you are installing the full version of EndNote (not the Demo version), you will need a valid EndNote product key to install the program. If you are upgrading from a previous version, you will also need your previous EndNote product key or serial number.

Program Requirements

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

System Requirements

EndNote runs under Macintosh OS X (Intel only) versions 10.5.x (Leopard), 10.6.x (Snow Leopard), and 10.7 (Lion).

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

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

Hardware Requirements

EndNote requires the following hardware:

- ◆ A Macintosh OS X (Intel only) 450 MHz or higher
- ◆ A hard drive with at least 400 MB of free space
- ◆ A minimum of 256 MB of available memory (RAM)
- ◆ In order to use EndNote's Connect command, an Internet connection is required. To use the Open Link command to access a Web site, you also need a Web browser installed.

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

NOTE: For Mac, check www.endnote.com/enmac.asp for the latest compatibility requirements.

Word Processor Compatibility

As of September 2011, EndNote for Macintosh is compatible with:

- ◆ Microsoft Word 2008 (SP1) and 2011
- ◆ Apple iWorks Pages '09 versions 1, 2.x, 3.x, and 4.x
- ◆ RTF files created with most word processors, including: Microsoft Word, WordPerfect, OpenOffice.org Writer, StarOffice, Nisus Writer, TextEdit, Mellel, and Scrivener.

NOTE: Endnote can also scan RTF documents created by Mariner Write if the documents are saved in Word's RTF and not Mariner Write's RTF.

Cite While You Write in Microsoft Word

EndNote's Cite While You Write commands are available for Microsoft Word 2008 and 2011.

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

If Microsoft Word 2008 or 2011 is installed on your computer, the appropriate Cite While You Write files are installed automatically when you run the EndNote installation.

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

- ◆ Microsoft Word must be correctly installed on your computer prior to installing EndNote.
- ◆ All applications, including Microsoft Word, must be closed during the installation of EndNote.
- ◆ The EndNote installer must be able to locate the Word startup folder. You need to have full read and write access to Word's startup folder in order to install EndNote commands.

Cite While You Write in Apple iWorks Pages '09

EndNote commands are available on the Insert and Edit menus in Pages '09.

RTF and ODT Documents

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

EndNote Installation

Follow these instructions to install the EndNote program.

If you are upgrading from a previous version of EndNote, please see "Upgrading from an Earlier EndNote Version" on page 14 before installing EndNote X5.

If you have purchased a Volume/Site License version of EndNote, please see "Networks and Volume Installations" in EndNote Help.

Installing EndNote

To install EndNote:

1. Make sure no applications are running—including virus protection software and Microsoft Word.
2. Start the EndNote installation program.

If you downloaded the EndNote installer: Double-click the disk image to display an EndNote X5 folder.

If you received EndNote on a CD: Insert the EndNote CD into your CD-ROM drive. If the installer does not launch immediately, double-click the EndNote X5 Site Installer to display an EndNote X5 folder.

3. Drag the EndNote X5 folder to the Applications folder on your hard drive.

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

4. Double-click on the Applications folder, then the EndNote X5 folder, then the EndNote X5 application icon in order to launch EndNote and a Customizer program.

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

Welcome: Thank you for purchasing EndNote!

Registration Key: If you are installing the full version of EndNote, enter your EndNote product key. You must enter a valid product key to continue with the installation of the full version of EndNote. The product key can be found in the EndNote X5 CD packaging or on the order confirmation of your digital product.

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

User Information: Enter your name and organization.

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

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

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

Product Registration: Please register your copy of EndNote!

When you start EndNote, a Customizer automatically installs Cite While You Write files for Microsoft Word 2008 and 2011 if any of them are found on your computer.

To make sure the EndNote program is installed correctly, see “Checking Your Installation” on page 17.

NOTE: If you use a non-English version of Word, see page 18.

Upgrading from an Earlier EndNote Version

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

Back up your files

Before you begin, it is important to back up your EndNote libraries (including corresponding .DATA folders), custom styles,

import filters, connection files, and spell check dictionaries, as well as any Word documents that use Cite While You Write.

Uninstall the older version of EndNote

It is best to check the uninstall instructions supplied with your old version of EndNote, as the instructions below are not valid for all older versions of EndNote.

1. Start the older version.
2. From the EndNote menu, select Customizer.
3. Select all of the options, and then click Uninstall.
4. Click Next and follow the prompts.

Install EndNote X5

Install the upgrade just as you would a new installation. See “EndNote Installation” on page 13. During installation, you will need to enter both your new EndNote X5 product key and your old EndNote product key or serial number. EndNote X5 is installed into an EndNote X5 folder.

After installing EndNote X5, you may have two folders with each containing EndNote files.

If you have backed up customized styles, filters, or connection files, you should also copy them to the Styles, Filters, or Connections folders in the EndNote X5 folder. EndNote includes a full collection of updated files, so unless you have specially customized a file for your needs, there is no reason to copy the old files.

To copy custom dictionaries from EndNote X or earlier versions to the new Mac OS spell checker, see “Importing Dictionaries” in EndNote Help.

Once you have copied your customized files and libraries to the EndNote X5 folder, and EndNote X5 is up and running, you can drag any remaining items in the old EndNote folder to the Trash. Be careful not to delete any libraries, papers, or other items that you need.

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

1. Start EndNote.
2. Go to the EndNote menu and select Preferences.
3. Click on the Folder Locations item.

4. If the folder paths do not include an EndNote X5 folder, click EndNote Defaults to update the paths.

Cite While You Write Users

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

If the file was created with EndNote 5-X2, use the new version of EndNote to format the document again. From Word's Tools menu, select EndNote X5, and then select Format Bibliography. This updates the document to work with EndNote X5.

If the file was originally created with an even older version of EndNote, you will need to unformat the citations with the old version of Word and the original EndNote Add-in before the document can be used by EndNote X5. If you no longer have access to the older version of Word or the old EndNote Add-in for Word, please contact Technical Support.

Opening and Converting Old EndNote Libraries

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

To convert an older EndNote library:

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

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

4. Click OK to convert the library. Name the new library and click Save. The conversion makes a copy of the original library in the latest file format and leaves the original library intact.

NOTE: Once you have opened and used a library with EndNote X5, you should use the library only with version X or later.

Using Old Style, Filter, and Connection Files

You may have created custom content files with an earlier version of EndNote. EndNote X5 can use your custom styles, filters, and connection files that were created with EndNote versions 4.0.1-X2. Once you edit and save one of these files with EndNote X5, it is converted to the latest format, which can be used with EndNote versions 8 to X5.

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

Customized reference types, temporary citation markers, and display fonts are all carried over from earlier versions of EndNote for use with EndNote X5.

Checking Your Installation

To Begin Using EndNote

To run EndNote, double-click the EndNote X5 icon found in the EndNote X5 folder.

If this is the first time you have started EndNote, a Customizer will attempt to install Cite While You Write files for Word.

Next, a dialog may ask whether you want to open a new EndNote Web account. For information about EndNote Web, see “Transferring References between EndNote Web and EndNote” in EndNote Help.

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

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

Checking Support for Microsoft Word

To see whether Cite While You Write is correctly installed:

Start EndNote, then start Microsoft Word, and then select the Tools menu.

You should see EndNote’s Cite While You Write commands on an EndNote X5 submenu in Word.

If you do not see these commands, Word support was not correctly installed. Try these three ways to install CWYW (after each attempt, start EndNote and then Word to check for an EndNote submenu on the Tools menu in Word):

1. Use the Customizer:
 - a. Make sure no applications are running—including virus protection software and Microsoft Word.
 - b. Start the EndNote program.
 - c. From the EndNote menu, select Customizer.
 - d. On the Component Selection dialog, select the components you want to install (or keep installed) and click Next.
2. Try reinstalling EndNote as described under “EndNote Installation” on page 13.
3. Install the files manually as described in EndNote Help.

Non-English Versions of Word

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

Additional Topics

The installation chapter in EndNote Help includes these additional topics:

- ◆ Installed Files
- ◆ Custom Installations/Adding Content Files

The EndNote team has developed thousands of content files (output styles, filters, and connection files). Because installing all of these files can slow performance, a typical EndNote installation includes only the most popular of each type of file. It is easy to find and install additional content files!

- ◆ Manually Installing Support for Word 2008 or 2011
- ◆ Updating EndNote Files
- ◆ Uninstalling EndNote

Chapter 2: Windows EndNote Installation

Before You Install EndNote

If you are installing the full version of EndNote (not the Demo version), you will need a valid EndNote product key to install the program. If you are upgrading from a previous version, you will also need your previous EndNote product key or serial number.

Program Requirements

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

System Requirements:

EndNote runs under the following operating systems:

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

Hardware Requirements:

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

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

NOTE: For Windows, check www.endnote.com/enwin.asp for the latest compatibility requirements.

Word Processor Compatibility

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

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

Microsoft Word

EndNote installs Cite While You Write commands in Microsoft Word.

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

Cite While You Write allows EndNote to format citations and create a bibliography for the document that is open in Word. You can format, unformat, and reformat a document without exiting your word processor.

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

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

OpenOffice.org Writer

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

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

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

RTF and ODT Documents

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

EndNote Installation

Follow these instructions to install the EndNote program.

If you are upgrading from a previous version of EndNote, please see "Upgrading from an Earlier EndNote Version" on page 27.

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

Installing EndNote

To install EndNote:

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

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

2. Start the EndNote installation program.

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

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

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

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

Welcome: Thank you for selecting EndNote!

Registration Information: If you are installing the full version of EndNote, enter your EndNote product key. You must enter a valid product key to continue with installation of the full version of EndNote. The product key can be found in the EndNote X5 CD packaging, or on the order confirmation of your digital product.

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

User Information: Enter your name and organization.

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

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

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

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

Select Destination: By default, EndNote is installed in the C:\Program Files\EndNote X5 folder. The Demo version is installed in the C:\Program Files\EndNote X5 Demo folder. You can use the Browse button to change the folder selection if you wish.

If a previous installation of EndNote is found in the same folder, you will be given the option to either back up or overwrite the older files. If you back up files, they are placed in a Backup folder in the installation folder.

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

Select Components: (Custom installations only) If you selected a Custom installation, see “Selecting Features” on page 26.

Select Default Citation Manager: (Microsoft Word 2007 and 2010 only) If the installer detects Microsoft Word 2007 or 2010, it asks whether to “Use EndNote as my default citation manager.” Cite While You Write will be installed in Word 2007 or 2010 in any case, but when this item is selected the installer will hide Word’s native Citations and Bibliography commands (the group normally found on the References tab in Word) in order to avoid confusion for the user.

Ready to Install: You can still click Cancel to stop the installation. Once you click Next, the installation program will begin installing EndNote files.

4. On the final “EndNote X5 is Successfully Installed” dialog, click Register to register your copy of EndNote, and then click Finish to close the installation program.

To make sure the program installed correctly, see “Checking Your Installation” on page 29.

Installed Files

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

Program Folder

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

- ◆ EndNote.exe application file
- ◆ EndNote.chm Help file
You can double-click the file to view it. In the EndNote program, select EndNote X5 Help from the Help menu.

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

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

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

Shared Folder

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

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

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

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

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

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

Personal Folder

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

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

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

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

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

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

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

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

Preferences Folder

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

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

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

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

While many EndNote preferences are stored in the Windows registry, some are stored in your personal preferences folder. It

contains the connect.log file that records your latest online search, the RefTypeTable.xml file that stores your reference type preferences, saved search strategies, and various other settings.

Custom Installations/ Adding Content Files

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

To perform a new custom installation:

1. Follow the instructions for “EndNote Installation” on page 21.
2. On the Select Installation Type dialog, select Custom.
3. From the Select Features dialog, read “Selecting Features” on page 26 to determine what you would like to select or deselect for your installation.

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

To install components after EndNote is already installed:

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

Selecting Features

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

The components you can select for installation include:

EndNote Application

- ◆ EndNote Program
- ◆ Sample Files
- ◆ EndNote Help
- ◆ Getting Started Guide

Word Templates/Add-ins:

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

OpenOffice.org Extension

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

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

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

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

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

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

Upgrading from an Earlier EndNote Version

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

We strongly recommend that you uninstall any earlier version of EndNote before you install EndNote X5. See “Uninstalling EndNote” on page 31.

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

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

Install the upgrade just as you would a new installation. See “EndNote Installation” on page 21.

Backing Up or Replacing Files

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

- ◆ **Backup older files:** EndNote X5 provides complete, updated sets of style, filter, and connection files, but if you want to keep any of your older modified files to use with EndNote X5, you should select this option. Doing so has EndNote create a Backup folder in the EndNote folder and all of the styles, filters, and connection files from your older installation are copied into that folder. After installing EndNote, you should move any of these files that you want to use into the Styles, Filters, or Connections folders installed with EndNote X5.
- ◆ **Remove older files:** If this option is selected, Setup replaces all of the styles, filters, and connection files from your existing EndNote installation with the new ones included with EndNote X5. Do not select this option if you have custom styles, filters, or connection files that you want to save. If they have the same names as any of the files to be installed, the installer will overwrite them with the new files.

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

Opening and Converting Old EndNote Libraries

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

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

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

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

4. Click OK to convert the library. Name the new library and click Save. The conversion makes a copy of the original library in the latest file format, and leaves the original library intact.

Using Old Style, Filter, and Connection Files

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

All of the styles, filters, and connection files supplied with EndNote X5 have been updated to the latest format. The new filter and connection files may be used by previous versions of EndNote, but you cannot edit EndNote X5 styles in previous versions of EndNote.

Checking Your Installation

To Begin Using EndNote

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

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

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

To check the version number of EndNote, select About EndNote from the Help menu. Click the splash screen to clear it.

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

Checking Cite While You Write Support

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

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

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

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

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

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

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

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

Automatically Updating Files

You can automatically update EndNote X5 when incremental program enhancements are available.

To update your copy of the EndNote program:

1. Open a connection to the Internet.
2. From EndNote’s Help menu, select EndNote Program Updates.

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

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

Uninstalling EndNote

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

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

Uninstalling Word 2007 and 2010 Settings

Word 2007 and 2010 settings are typically registered during installation of the EndNote program, and in those cases they will also be uninstalled along with the program. You can jump to the next section called “Uninstalling the EndNote Program” on page 31 for more information.

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

To uninstall Word 2007 or 2010 settings:

1. Log on to the workstation as the current user. You do not have to be an administrator.
2. Launch the Configure EndNote utility. You can do this in one of these ways:
 - ◆ From the Windows Start menu, select All Programs > EndNote > Configure EndNote.
 - ◆ Go to the EndNote program folder and double-click Configure EndNote.exe.
3. Select Remove all EndNote components for me, and then click Next.
4. Continue through the uninstall process as instructed.

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

Uninstalling the EndNote Program

To uninstall EndNote:

1. Log in to the machine with administrative rights or as a user with program installation privileges.
2. From the Windows Start menu, select Control Panel.
3. Select Add or Remove Programs (Windows XP) or Programs and Features (Windows Vista or Windows 7).
4. In the list of currently installed programs, select EndNote X5.

5. Click Remove (Windows XP) or Uninstall/Change (Windows Vista or Windows 7).

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

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

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

To remove any modified EndNote files that remain:

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

Windows XP

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

Windows Vista

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

Windows 7

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

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

Chapter 3: Introduction to an EndNote Library

This chapter covers the basics of working with EndNote. In particular, you will learn how to:

- ◆ Start EndNote and open a library.
- ◆ Sort the reference list.
- ◆ Select, open, and close references in the EndNote library.
- ◆ Save references to custom groups.
- ◆ Quit from the EndNote program.

Start EndNote

To start the EndNote program and open the sample library:

1. **Macintosh:** Open the EndNote X5 folder and double-click the EndNote program icon. By default, the EndNote X5 folder is installed in the Applications folder on your hard drive.

Windows: From the Start menu, select All Programs > EndNote > EndNote Program.

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

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



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

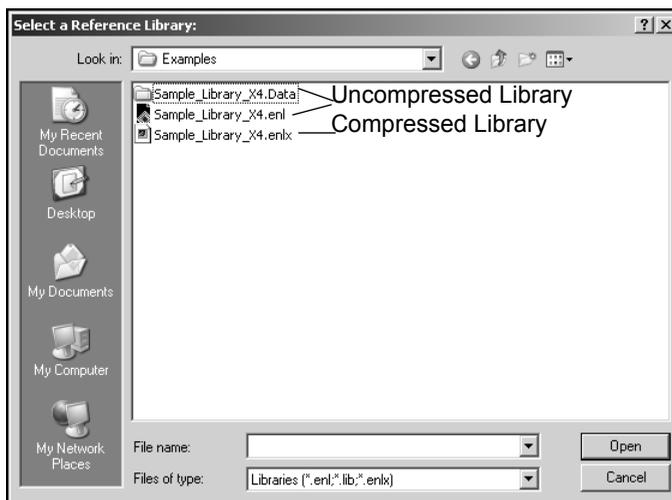
2. Click the File Cabinet icon.
3. In the file dialog, locate and open a reference library:
Macintosh: Navigate to the EndNote X5 folder, select the Examples folder, and then click Open.
Windows: Use the Look In menu to find the EndNote X5 Examples folder.
 - ◆ Select the C: drive and Open.
 - ◆ Select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

The example library is shipped to you as a single compressed file called Sample_Library_X5.enlx.

Open the Sample_Library_X5.enlx file and EndNote extracts the uncompressed library files (Sample_Library_X5.enl and Sample_Library_X5.Data) for viewing.

If you have previously opened the compressed sample library, select Sample_Library_X5.enl, and then click Open.

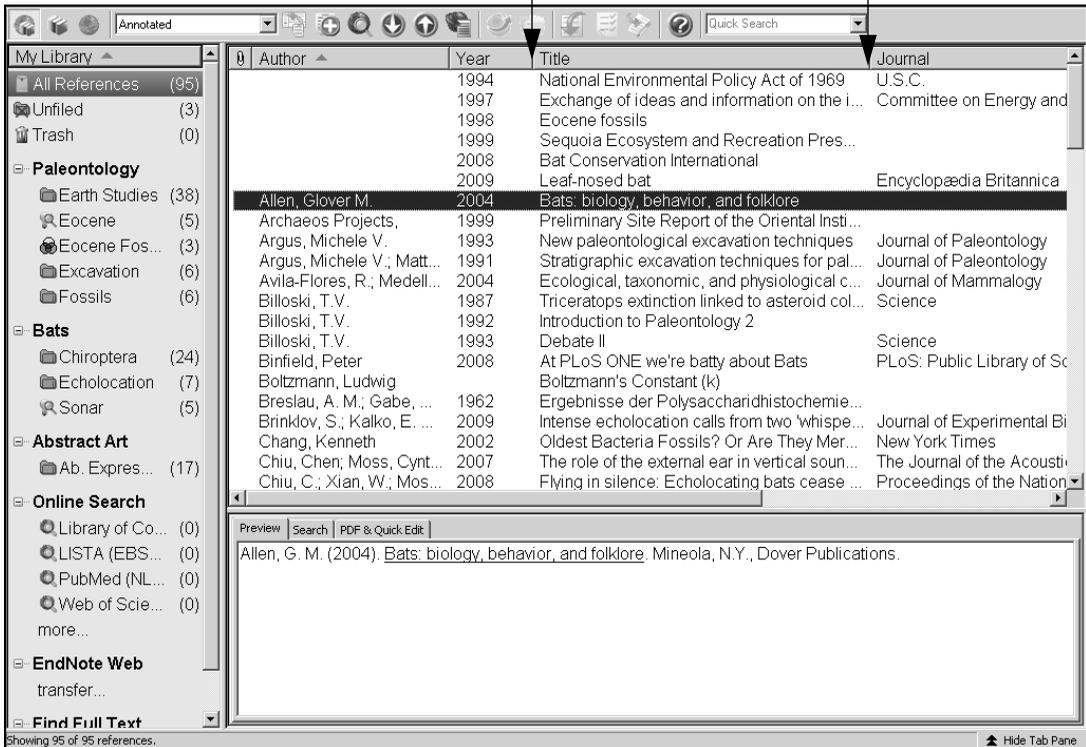
If your folder settings are not set up to show file extensions, determine the file type based on the icons indicated in the picture below.



The Library Window

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

Move column dividers to adjust column widths



The Library window includes three panes:

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

- ◆ Author's last name, first name, initial (all names are shown)
- ◆ Year
- ◆ Title
- ◆ Journal name or secondary title
- ◆ Reference type
- ◆ URL

◆ Last Updated

NOTE: You can change the order of the fields that display in the reference list by selecting from the Endnote X5 menu (Macintosh) or Edit menu (Windows) Preferences > Display Fields.

Groups pane: Displays various groups of references for easy retrieval.

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

The information displayed in the reference list, as well as the font used for the display, can be changed using EndNote Preferences. Chapter 4 provides more information about customizing the Library window.

You can browse through the reference list by first selecting a reference, and then using the scroll bar, the scroll arrows, or the Page Down, Page Up, Home, End, and Arrow keys.

Preview References

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

To preview a reference:

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

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

- To select a different output style to apply to the reference, go to the toolbar and select Numbered from the Output Styles menu.

Output Style menu

Macintosh Toolbar



Windows Toolbar



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

Author	Year	Title	Journal
	1994	National Environmental Policy Act of 1969	U.S.C.
	1997	Exchange of ideas and information on the i...	Committee on Energy and
	1998	Eocene fossils	
	1999	Sequoia Ecosystem and Recreation Pres...	
	2008	Bat Conservation International	
	2009	Leaf-nosed bat	Encyclopædia Britannica
Allen, Glover M.	2004	Bats: biology, behavior, and folklore	
Archaeos Projects,	1999	Preliminary Site Report of the Oriental Insti...	
Argus, Michele V.	1993	New paleontological excavation techniques	Journal of Paleontology
Argus, Michele V.; Matt...	1991	Stratigraphic excavation techniques for pal...	Journal of Paleontology
Avila-Flores, R.; Medell...	2004	Ecological, taxonomic, and physiological c...	Journal of Mammalogy
Billoski, T.V.	1987	Triceratops extinction linked to asteroid col...	Science
Billoski, T.V.	1992	Introduction to Paleontology 2	
Billoski, T.V.	1993	Debate II	Science
Binfield, Peter	2008	At PLoS ONE we're batty about Bats	PLoS: Public Library of Sc
Boltzmann, Ludwig		Boltzmann's Constant (k)	
Breslau, A. M.; Gabe, ...	1962	Ergebnisse der Polysaccharidhistochemie...	
Brinklov, S.; Kalko, E. ...	2009	Intense echolocation calls from two 'whispe...	Journal of Experimental Bi
Chang, Kenneth	2002	Oldest Bacteria Fossils? Or Are They Mer...	New York Times
Chiu, Chen; Moss, Cynt...	2007	The role of the external ear in vertical soun...	The Journal of the Acousti
Chiu, C.; Xian, W.; Mos...	2008	Flying in silence: Echolocating bats cease ...	Proceedings of the Nation

Preview Search PDF & Quick Edit

Allen, G. M. (2004). Bats: biology, behavior, and folklore. Mineola, N.Y., Dover Publications.

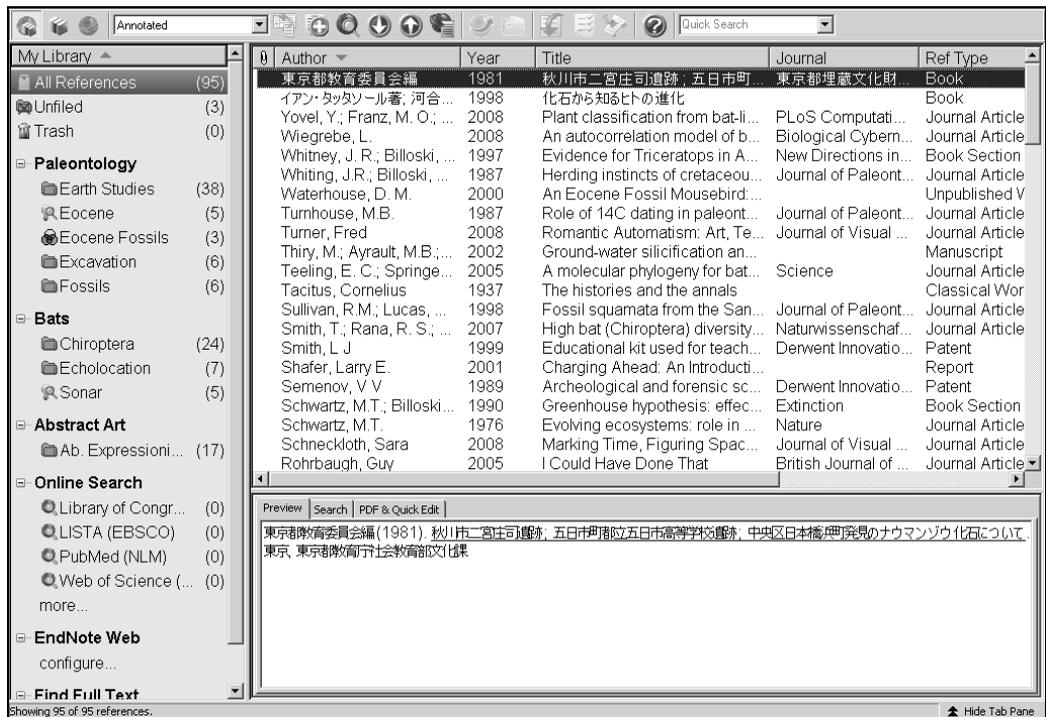
When the Tab pane is showing, a Hide Tab Pane button is available at the bottom of the window. You can click the Hide Tab Pane to hide the Preview tab and the other tabs.

Sort the References

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

To change the sort order:

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



NOTE: This example shows references that include Japanese characters. EndNote uses Unicode to encode special characters, so that data is easily translated between platforms, programs, and languages. If boxes appear instead of characters, you may need to change the EndNote display fonts to a Unicode font. You will learn how to do this in Chapter 4: "Setting EndNote Preferences". If you are running Windows, you may need to install special Windows Language Packs for some display elements. Consult your Windows documentation for more information about Language Packs.

2. Click the Year column heading to see the references sorted in ascending order based on the year of publication.
3. Click the Year column heading again to reverse the sort order and see the references sorted in descending order.
4. Click the Author column heading to return the sort order of the library to an alphabetical list sorted by the author names.

Select and Open a Reference

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

There are different ways to select a reference, such as:

1. Clicking on the reference using the mouse;
2. Using the arrow keys; or
3. Typing the first few letters found in the field by which the library has been sorted.

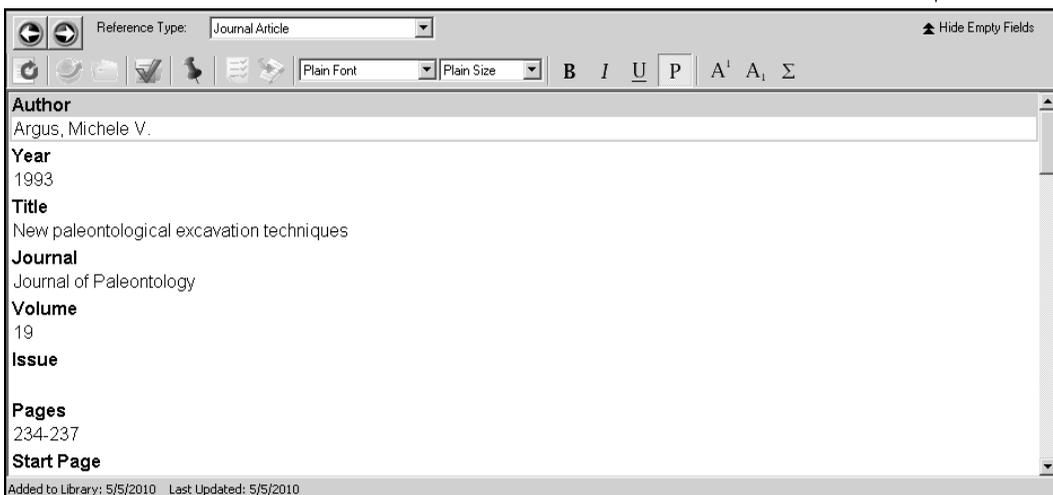
To see how this works, click any reference to select it. Press the Up or Down Arrow to select the previous or next reference.

To quickly find and display a reference:

1. Select the first Argus reference in the list. Now that the reference is selected, there are a number of things you can do with it, such as view its contents, copy, cut, delete, or edit it.
2. Open the selected Argus reference by pressing the Return key (Macintosh) or Enter key (Windows) or by using the Edit References command on the References menu. You can also open a reference by double-clicking on it in the reference list.

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

Show or Hide empty fields in the reference.



Click and drag to resize the window. Note that all windows in EndNote are maximized when opened.

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

To view the rest of the reference, use the mouse to scroll down the Reference window or press the Tab key to move forward from one field to the next.

- ◆ Press Shift+Tab to move backwards through the fields.
- ◆ Click the Toggle Empty Fields button (Macintosh) or Show Empty Fields / Hide Empty Fields button (Windows) to toggle between showing all fields in the reference and only those fields that contain data.

Close the Reference

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

- ◆ Click the X Close button (Windows) in the upper corner of the Reference window (not the outer close button for the library) or the red Close button (Macintosh) in the upper left corner of the window.
- ◆ From the File menu, select Close Reference.

- ◆ From the keyboard, press Command+W (Macintosh) or Ctrl+W (Windows). Note that many of the menu commands have a keyboard equivalent next to them.

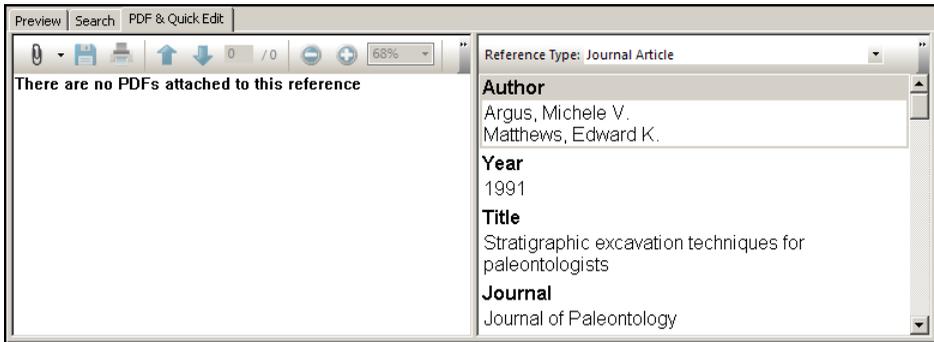
EndNote prompts you to save your changes. Click Yes to save your changes.

PDF & Quick Edit Tab

About the Quick Edit Pane

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

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



About the PDF Viewer Pane

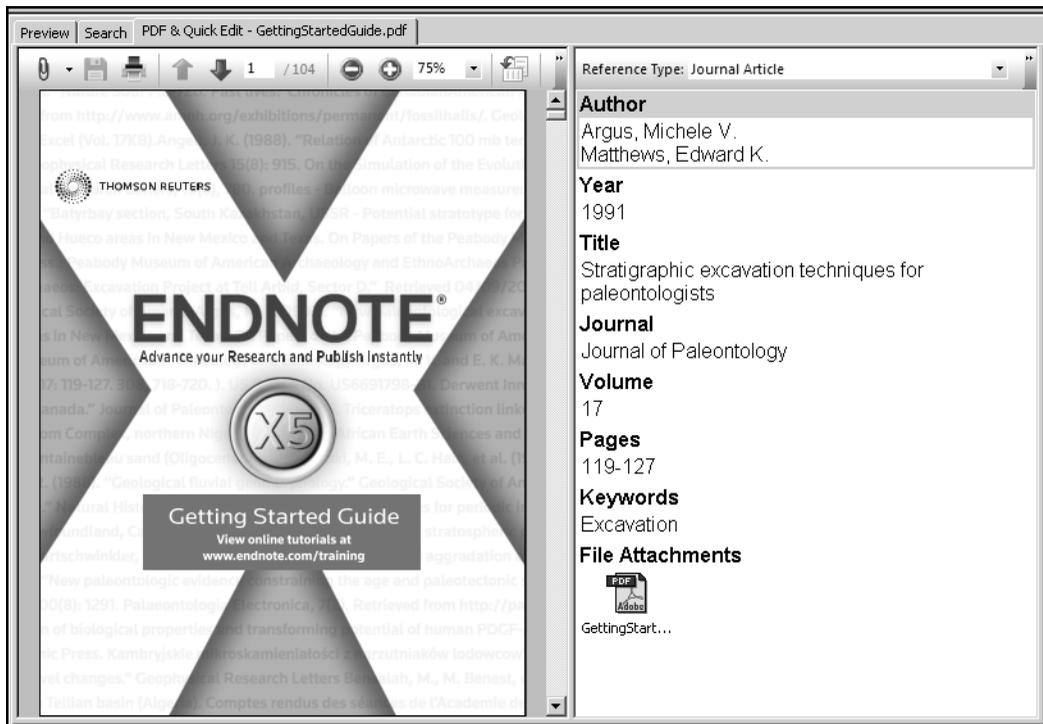
The PDF Viewer pane allows you to open and view PDF files attached to the current reference.

Let's attach a PDF file to the reference

1. Place your cursor inside the PDF Viewer pane. Note that a message displays that says: "There are no PDFs attached to this reference."
2. Press Ctrl+Alt+A to open a "Select a File" dialog. Alternatively, you can click the paper clip icon, and then select Attach PDF from the menu.
3. Navigate to the folder Program Files\EndNote X5 (Windows) or to Applications/EndNote X5 (Macintosh).
4. Notice the check box titled "Copy this file to the default file attachment folder and create a relative link." Make sure this

box is selected so that EndNote will make a copy of the file to store with the library. That way, the attached file is always available to you, even when you move the library.

5. Select the file titled GettingStartedGuide.pdf.
6. Click Open to insert the file into the reference.
7. To save the PDF file, navigate away from the current reference by clicking on another reference in the library list.
8. Select the Argus reference to display the Getting Started Guide in the PDF Viewer pane.



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

Windows
Floating Toolbar

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





Macintosh
Floating Toolbar

The options include:

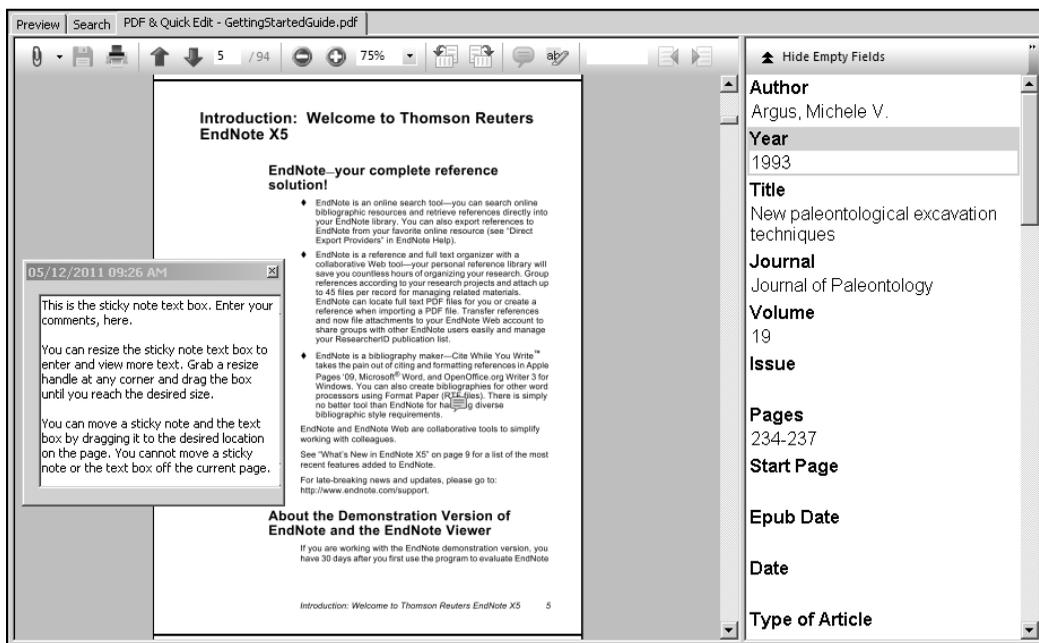
- ◆ PDF Attachments (Paper Clip icon with contextual menu)
- ◆ Save PDF
- ◆ Print
- ◆ Previous Page \ Next Page
- ◆ Go to (page)
- ◆ Zoom Out \ Zoom In
- ◆ Rotate Counterclockwise \ Rotate Clockwise
- ◆ Sticky Note
- ◆ Highlight Text
- ◆ Find (search PDF).

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

Let's create a sticky note

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

prompted.



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

Save References to a Custom Group

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

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

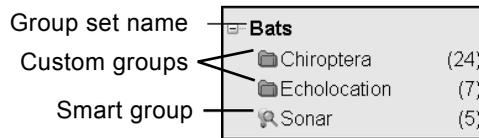


Below the permanent groups, you can create group sets to organize up to 5,000 custom, smart, and combination groups in the library.

- ◆ A custom group is built by specifically adding individual references to the group.

- ◆ A smart group is compiled automatically and is based on a search strategy.
- ◆ A combination group consists of custom and/or smart groups.

The sample library has several custom groups of references. Click the group names under the Bats set in the left pane of the Library window to view the references in each group.



Then, click All References to display all of the references in the library again.

To create a custom group and add references to it:

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

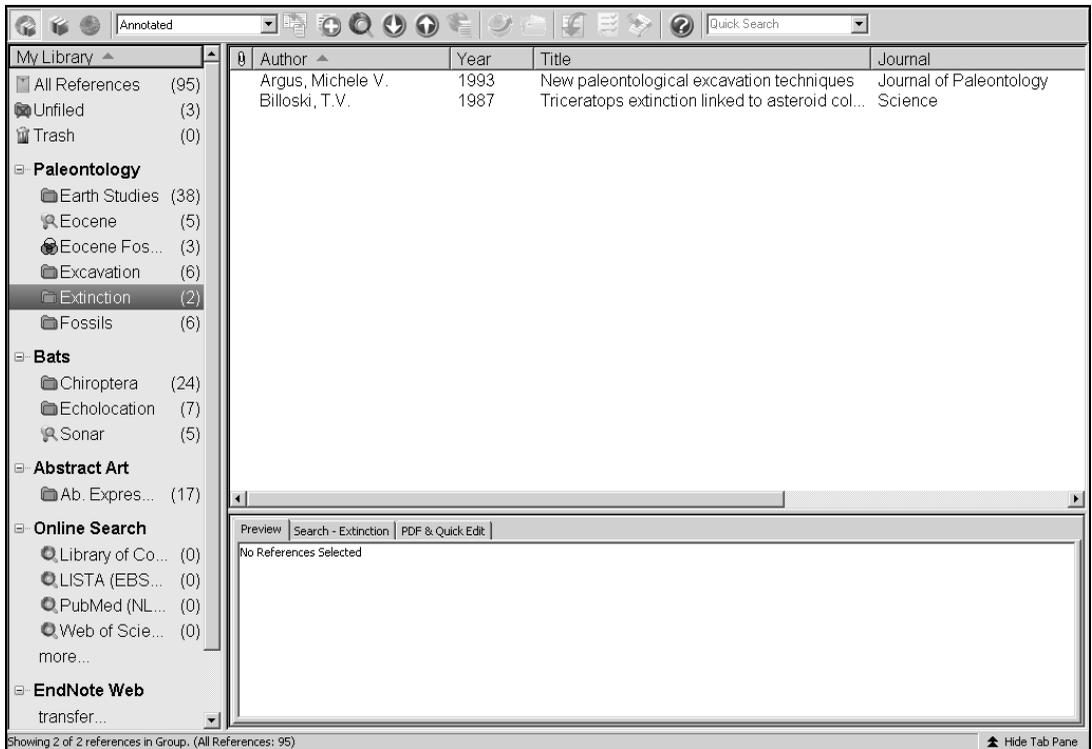
In the Groups pane of the Library window, a group titled New Group is now highlighted for editing.

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

There are no references in the new Extinction group.

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

7. Select the Extinction group to display the two references now included in the group.



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

To move the group to a different group set:

1. Click the Extinction group.
2. Drag it to the Bats group set, and then drop the group anywhere in the Bats set.

To delete a custom group:

1. Control+click (Macintosh) or right-click (Windows) on the Extinction group name to display a contextual menu, and then select Delete Group.
2. When you are asked to verify the deletion, click Delete.

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

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

Related Sections in EndNote Help

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

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

Chapter 4: Setting EndNote Preferences

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

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

Open the Sample Library

If EndNote is not already running, start it and open the library called `Sample_Library_X5.enl` as shown in “Start EndNote” on page 35.

Access EndNote Preferences

To view or change the EndNote preferences:

From the Endnote X5 menu (Macintosh) or Edit menu (Windows), select Preferences.

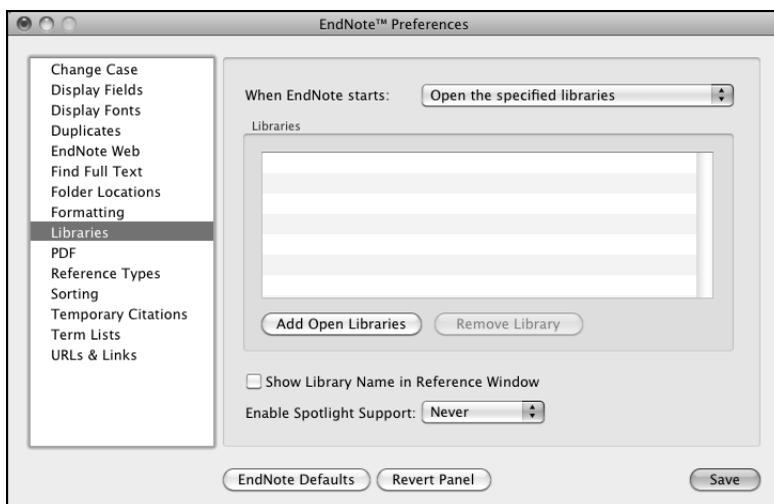
Set a Favorite Library

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

To set a favorite library:

1. Go to the Endnote X5 menu (Macintosh) or Edit menu (Windows), and then select Preferences.
2. In the list on the left, click Libraries.
3. Select “Open the specified libraries” from the When EndNote Starts menu.

4. Click Add Open Libraries. You should see the full path and file name of the sample library (Sample_Library_X5.enl) listed at the top of the box.



5. Click Save (Macintosh) or Apply (Windows) to save this change.

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

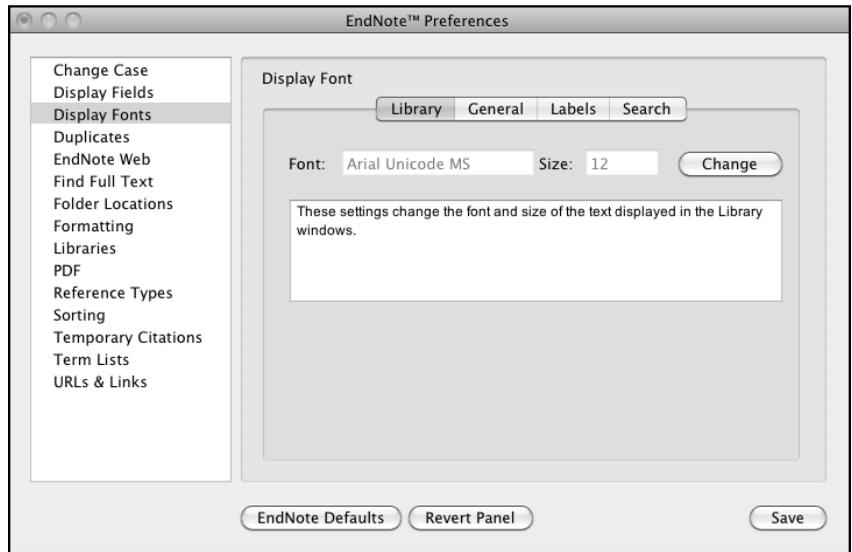
Change the Library Display Font

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

To change the display fonts:

1. Go to the Endnote X5 menu (Macintosh) or Edit menu (Windows), and then select Preferences.
2. In the list on the left, click Display Fonts to display a dialog with four tabs.
 - ◆ The Library tab determines the font and size of the references listed in the Reference List pane of the Library window.
 - ◆ The General tab changes the font used to display most text that is typed into EndNote such as in the Reference or Style windows. The General font is also used for most of the previews and information panels in EndNote, as well as for bibliographies that are printed or copied directly from EndNote.

- ◆ The Labels tab determines the font and size used for the Reference window field labels.
- ◆ The Search tab determines the font and size applied to user-entered text on the Search tab.



3. On the Library tab, click the Change (Macintosh) or Change Font (Windows) button.
4. In the Font list, select a different font (for Windows, select Arial Unicode MS, if available, since it supports Japanese characters). Close the Fonts dialog, and then click Save (Macintosh) or OK (Windows) to save the change.

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

5. On the General tab, click the Change (Macintosh) or Change Font (Windows) button.
6. In the Font list, select a different font (for Windows, select Arial Unicode MS, if available, since it supports Japanese characters), and then Save (Macintosh) or OK (Windows) to save the change.
7. Click the red Close button (Macintosh) or OK (Windows) to leave the Preferences dialog.

Related Sections in EndNote Help

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

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

Chapter 5: Entering a Reference

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

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

Open the Sample Library

If EndNote is not already running, start it and open the library called Sample_Library_X5.enl as shown in “Start EndNote” on page 35.

Create a New Reference

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

- ◆ Type the reference information into the Reference window.
- ◆ Connect to an online bibliographic database and retrieve the references directly into EndNote as demonstrated in “Searching an Online Database” on page 61.
- ◆ Import text files of references that have been downloaded from online bibliographic databases as demonstrated in “Importing Reference Data into EndNote” on page 73

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

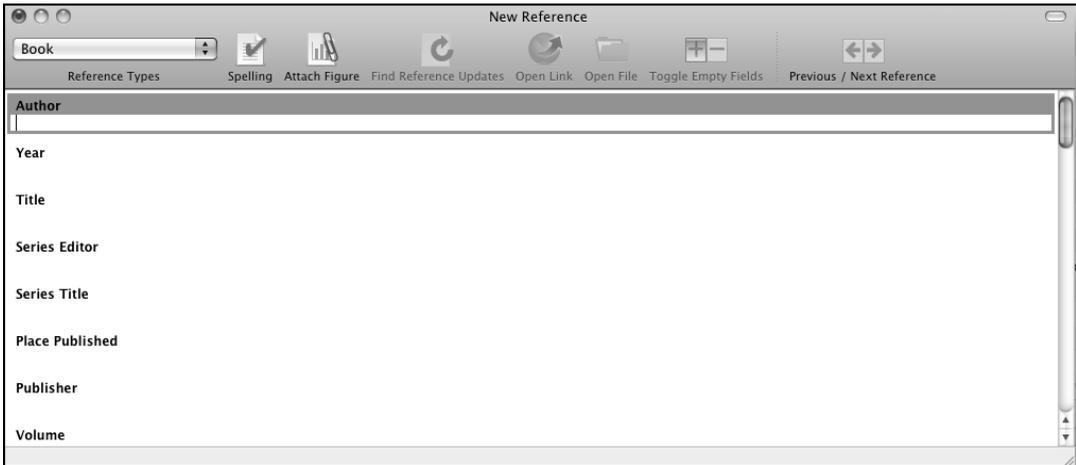
1. Click in the reference list, and then from the References menu, select New Reference to display an empty Reference window.

Reference Type list

The screenshot shows the 'EndNote X5 - [New Reference]' dialog box. The 'Reference Type:' dropdown menu is set to 'Journal Article'. The main area contains several text input fields labeled Author, Year, Title, Journal, Volume, Issue, Pages, and Start Page.

New references appear as Journal Article (unless you change the default setting). They can be changed to another reference type using the Reference Type list at the top of the window.

2. Select the Book reference type from the Reference Type menu.



Notice that the Field list changes to reflect the type of bibliographic information you would record for a book. Select other reference types from the list to see how the list of fields changes for each type of source.

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

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

3. Enter author names for the reference. Individual author names must be entered one per line.
 - a. Enter an author name with the first name first. With the cursor in the Author field, type:

Tiberius Rex

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

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

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

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

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

Morre, Nicole

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

Author Tiberius Rex Morre, Nicole
--

Press Return (Macintosh) or Enter (Windows) to accept EndNote's suggested author name.

- c. For the third author, enter:

de Young, John Robert, Jr.

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

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

University of California,, Berkeley

Corporate author names are entered with a following comma, so they will not be manipulated like personal author names. In this case, the corporate author name has a comma within the name. We inserted two commas to allow for correct formatting. The first comma makes it

clear that text up to that point should not be manipulated, and the second comma indicates that there is no “first name,” yet includes suffix text.

4. Press Tab to accept the author name and move to the Year field. Type “2006” as the search term.
5. Continue entering the reference as shown below using the Tab key to move to the next field and Shift+Tab to move to the previous field. You can also use the mouse to click in the desired field. If information is not provided for a particular field, leave that field empty.

Title: The scale and the feather: A
suggested evolution

Journal: Paleontology

Volume: 3

Issue: 1

Pages: 125-128

Date: November 22

Keywords: Feathers
Evolution
Birds

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

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

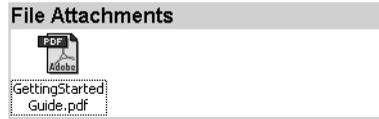
6. Attach a PDF file to the reference. You can attach almost any type of file to the File Attachments field of a reference.

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

- a. Navigate to the folder:
Applications/EndNote X5 (Macintosh)
Program Files\EndNote X5 (Windows)
- b. Notice the check box titled “Copy this file to the default file attachment folder and create a relative link.” Make sure this box is selected so that EndNote will make a copy of the file to store with the library. That way, the

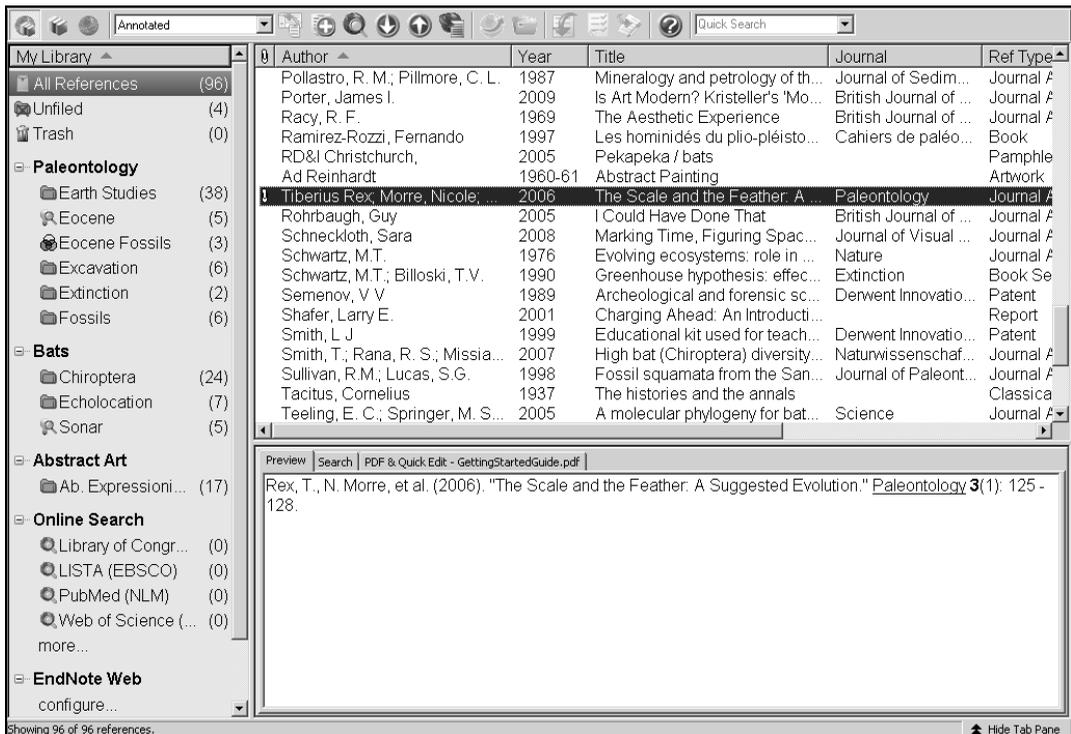
attached file is always available to you, even when you move the library.

- c. Highlight the file titled GettingStartedGuide.pdf.
- d. Click Open to insert the file into the File Attachments field. A file icon will appear in the field.



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

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



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

Locate References that Contain Attached Files

You can easily locate those references that contain attached files.

To locate the references containing attached files:

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



A screenshot of an EndNote reference list. The first column heading has a paper clip icon. The list contains 12 references with columns for Author, Year, Title, and Journal. The references are sorted by the presence of attached files, with the top row having a paper clip icon in the Author column.

📎	Author	Year	Title	Journal
📎	Tiberius Rex; Morre, Nicole; De...	2006	The scale and the feather: A suggested evolution	Paleontology
	東京都教育委員会編	1981	秋川市二宮庄司遺跡; 五日市町都立五日市高等学校遺跡; 中央区日本橋浜町発...	東京都埋蔵文化財調査報告 ;第8集
	イアン・ タッタソール著; 河合...	1998	化石から知るヒトの進化	
	Zhu, M. Y.; Vannier, J.; Van Iten...	2004	Direct evidence for predation on trilobites in the Cambrian	Proc Biol Sci
	Zhiyi, Z.; Wenwei, Y.; Zhiqiang, Z.	2010	Evolutional trends and palaeobiogeography of the Ordovician trilobite Ovaloc...	Proc Biol Sci
	Zhang, X. G.; Clarkson, E. N.	2009	Trunk segmentation of Cambrian eodiscoid trilobites	Evol Dev
	Yovel, Y.; Franz, M. O.; Stilz, P.;...	2008	Plant classification from bat-like echolocation signals	PLoS Computational Biology
	Wiegrebe, L.	2008	An autocorrelation model of bat sonar	Biological Cybernetics
	Whitney, J. R.; Billoski, T.V.; Jo...	1997	Evidence for Triceratops in Antarctica	New Directions in Paleontology
	Whiting, J.R.; Billoski, T.V.; Jon...	1987	Herding instincts of cretaceous duck-billed dinosaurs	Journal of Paleontology
	Webster, M.; Zelditch, M. L.	2011	Modularity of a Cambrian ptychoparioid trilobite cranium	Evol Dev

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

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

Related Sections in EndNote Help

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

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

Chapter 6: Searching an Online Database

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

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

This section will guide you through these basic steps:

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

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

About the PubMed Database

For this lesson, you will connect to PubMed, the U.S. National Library of Medicine's online public access version of their MEDLINE database.

For Users With “Dial-up” Internet Connections

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

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

Disconnecting: EndNote disconnects from an online database as soon as a search is completed. EndNote will not disconnect your Internet connection at any point. You need to shut down your connection when you have finished using EndNote's Online Search feature.

Open the Sample Library

If EndNote is not already running, start it and open the library called Sample_Library_X5.enl as shown in “Start EndNote” on page 35.

Select a Display Mode

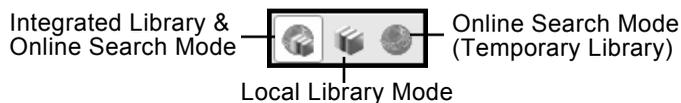
You can choose from different display modes in the Library window by selecting one of these from the toolbar.

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

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

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

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



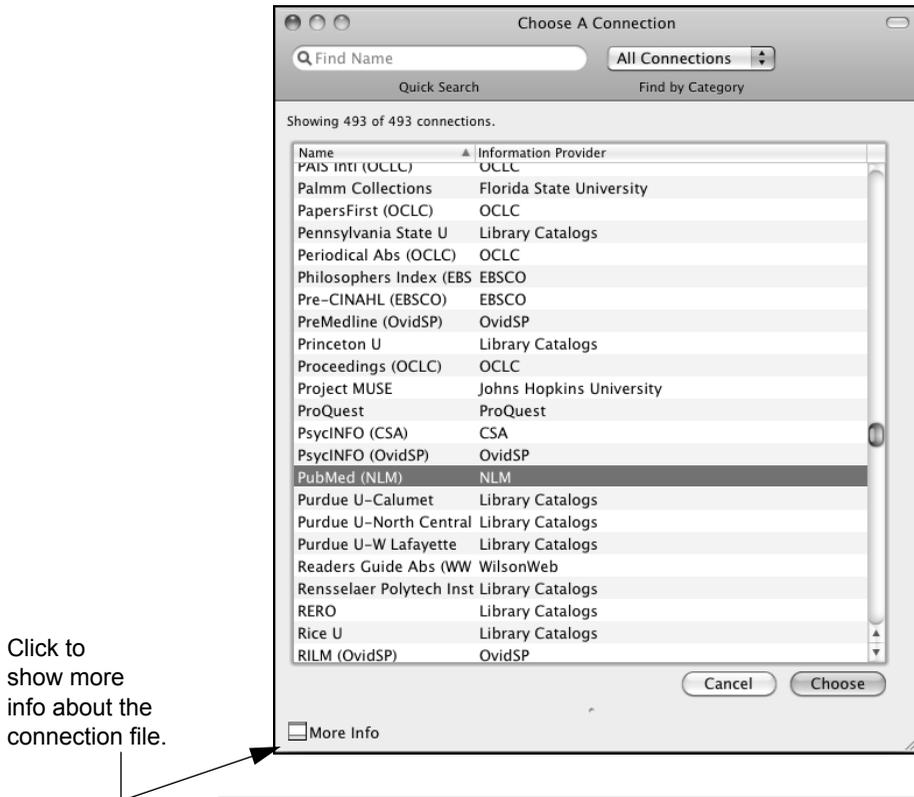
To continue the tour, click the left icon to select Integrated Library & Online Search Mode so that all groups and commands are available.

Connect to an Online Database

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

To connect to the PubMed Database:

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



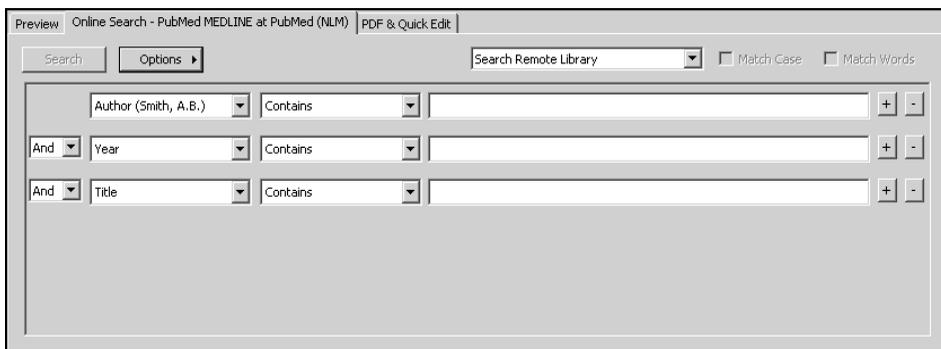
NOTE: The Groups pane will remember databases you have connected to in the past for easy access under Online Search. You can also customize a list of favorite databases to search by using the Connection Manager.

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

2. Click the Find by Category button (Macintosh) or the Find by button (Windows) to view a list of various categories of databases to help you locate the one that you need. Or, type text into the Quick Search text box and press Return (Macintosh) or Enter (Windows).
3. Select the PubMed connection file, and then click Choose. You can begin entering your search terms in the fields.

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

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



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

NOTE: If you previously set a default configuration for the Search tab, the search field lists display the fields you selected as your defaults. If one of those default fields is not a valid option for this particular online database, the field selection may appear as "Any Field" or "All Fields."

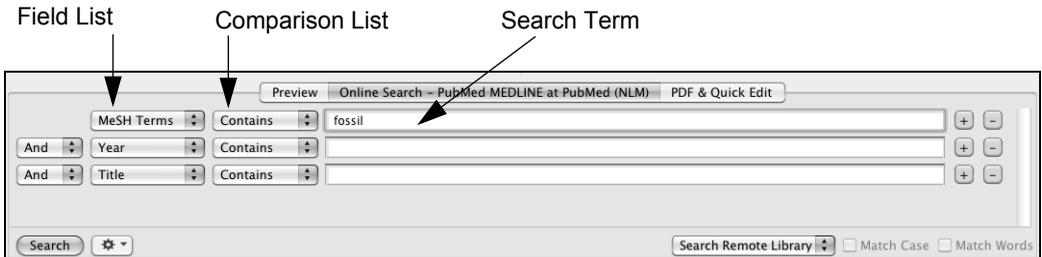
Search the Database

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

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

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

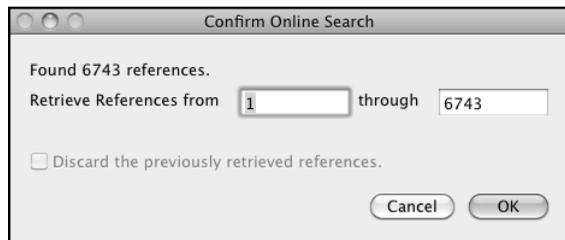
1. In the Groups pane, select PubMed (LMN)
2. Set the Field list for the first line to MeSH Terms, and enter “fossil” into the search text field. The Comparison list for online searches is always set to Contains.



Match Case and Match Words are not available for online searches

3. Click Search.

EndNote sends the search request off to the online database and a summary of the search results is displayed.



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

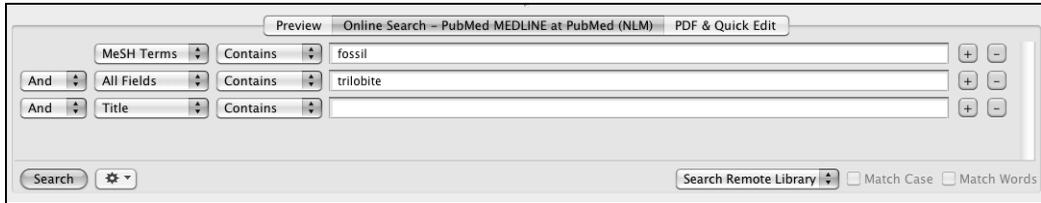
NOTE: You can halt a retrieval in progress by clicking the Cancel button on the Search tab. Records that have been processed up to that point already exist in the library.

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

If the result set seems too many, you can refine the search to get closer to exactly those references you want. Let's refine this search by looking for just those references that include

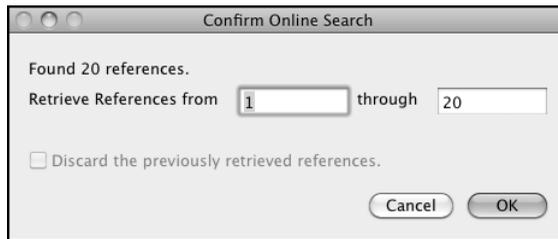
mention of a “trilobite,” a group of extinct marine animals that were abundant in the Paleozoic era.

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



7. Click Search.

This time fewer references are found.



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

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

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

The screenshot shows a reference management application with a sidebar on the left and a main table of references. The sidebar lists various library categories and their reference counts. The main table displays a list of references with columns for Author, Year, Title, and Journal. Below the table is a search preview pane for PubMed (NLM) with search criteria for 'fossil' and 'trilobite'.

Author	Year	Title	Journal
Clarkson, E. N.; Levi-S...	1975	Trilobite eyes and the optics of Des Cartes...	Nature
Footo, M.; Raup, D. M.	1996	Fossil preservation and the stratigraphic ra...	Paleobiology
Fortey, R.; Chatterton, B.	2003	A Devonian trilobite with an eyeshade	Science
Fusco, G.; Hughes, N. ...	2004	Exploring developmental modes in a fossil ...	Am Nat
Gal, J.; Horvath, G.; Cla...	2000	Image formation by bifocal lenses in a trilo...	Vision Res
Horvath, G.	1989	Geometric optics of trilobite eyes: a theore...	Math Biosci
Hughes, N. C.	2003	Trilobite body patterning and the evolution ...	Bioessays
Knell, R. J.; Fortey, R. A.	2005	Trilobite spines and beetle horns: sexual s...	Biol Lett
Lee, M. S.; Jago, J. B.; ...	2011	Modern optics in exceptionally preserved e...	Nature
Lieberman, B. S.; Kari...	2010	Tracing the trilobite tree from the root to th...	Arthropod Struct Dev
Park, T. Y.; Choi, D. K.	2009	Post-embryonic development of the Furon...	Evol Dev
Sepich, D. S.; Myers, D...	2000	Role of the zebrafish trilobite locus in gastr...	Genesis
Simpson, A. G.; Hughe...	2005	Development of the caudal exoskeleton of ...	Evol Dev
Wagner, P. J.	2000	Exhaustion of morphologic character state...	Evolution
Webber, A. J.; Hunda, ...	2007	Quantitatively comparing morphological tre...	Evolution
Webster, M.	2007	A Cambrian peak in morphological variati...	Science
Webster, M.; Zelditch, ...	2011	Modularity of a Cambrian ptychoparioid tril...	Evol Dev
Zhang, X. G.; Clarkson, ...	2009	Trunk segmentation of Cambrian eodiscoi...	Evol Dev
Zhiyi, Z.; Wenwei, Y.; Zh...	2010	Evolutional trends and palaeobiogeograph...	Proc Biol Sci
Zhu, M. Y.; Vannier, J.; ...	2004	Direct evidence for predation on trilobites l...	Proc Biol Sci

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

NOTE: You can click the triangle icon (Macintosh) or plus or minus icon (Windows) next to a group set heading to display or hide the list of groups under that heading.

Review the References

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

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

To quickly look at the new references:

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

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

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

Delete Unwanted References

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

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

To delete references:

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

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

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

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

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

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

Find the Full Text for a Reference

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

To find the full text for a reference:

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

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

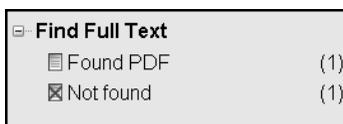
4. Click OK to begin the Find Full Text search.

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

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

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

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



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

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

Select the Chiu reference in the library window, and then click the PDF & Quick Edit tab to open the PDF in the PDF Viewer pane. See “PDF & Quick Edit Tab” on page 44 to learn more about this feature.

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

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

Related Sections in EndNote Help

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

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

Chapter 7: Importing Reference Data into EndNote

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

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

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

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

Open the Sample Library

If EndNote is not already running, start it and open the library called `Sample_Library_X5.enl` as shown in "Start EndNote" on page 35.

Search the Database and Save the References

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

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

Early Eocene Bat from Wyoming.

Jepsen GL.

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

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

PMID: 17770307 [PubMed - as supplied by publisher]

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

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

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

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

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

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

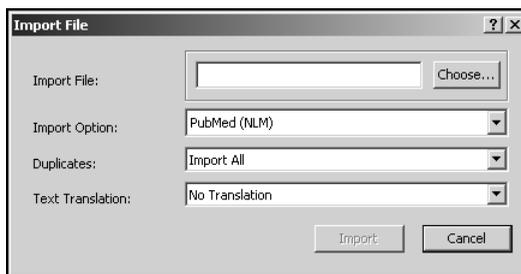
Choose the Correct Import Filter and Import into EndNote

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

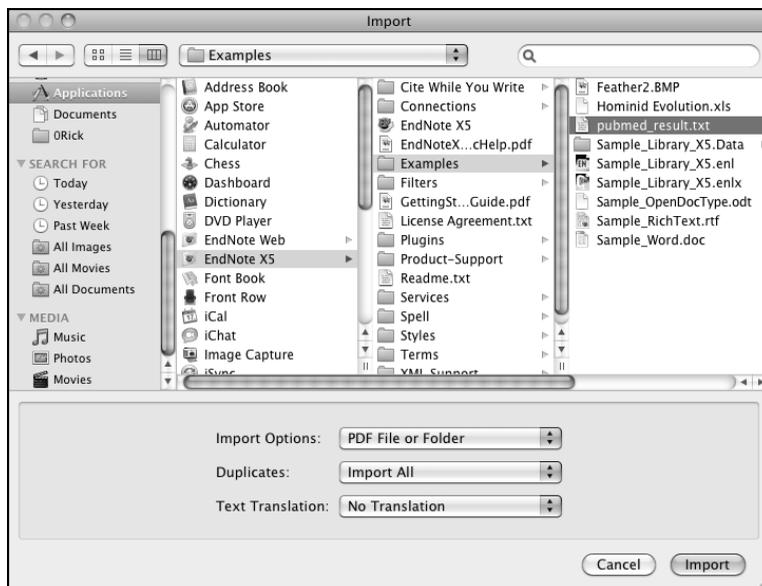
To import the sample PubMed text file into the sample library:

1. From the File menu, select Import.

The Windows Import dialog



The Macintosh Import dialog



2. Select the file to import.

Macintosh: Browse to the Applications/EndNote X5/Examples folder and highlight the pubmed_result.txt file.

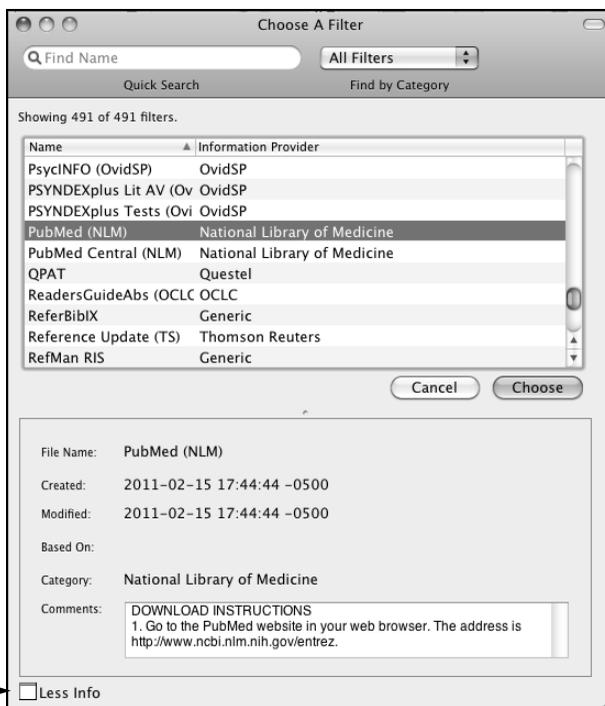
Windows: Click the Choose button to display a file dialog. Browse to the Program Files\EndNote X5\Examples folder, and then highlight and open the pubmed_result.txt file.

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

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

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

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



Click to display more or less info about the file.

If the More Info button is available, click it and notice that the Comments section at the bottom of the window gives tips for downloading references from the selected source.

- With the PubMed (NLM) filter highlighted, click the Choose button.

6. Leave the other two options at their default settings.

Duplicates: Import All

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

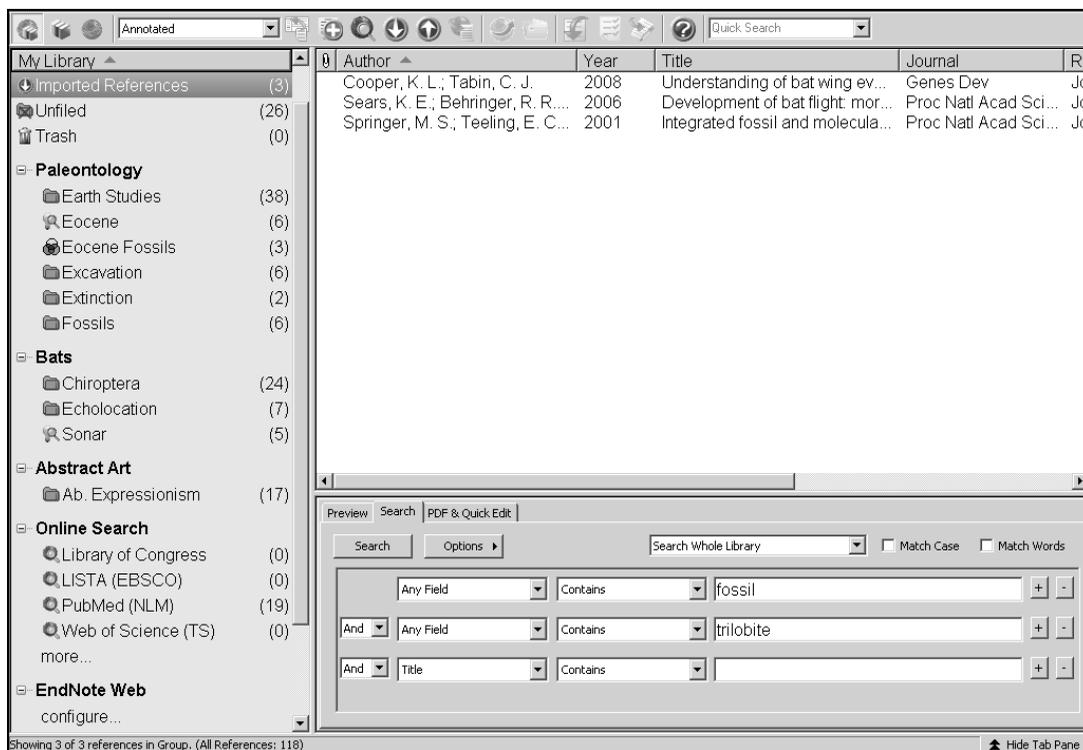
Text Translation: No Translation

This option allows you to specify the text character encoding of the file you import. This is important when you import references in languages that include extended characters. You can also find the correct language encoding information by opening the text file in Microsoft Word or another word processor.

7. Click Import to import the file.

When the process is complete, only newly imported references display in the reference list. This is a good time to peruse the new references to make sure they imported as expected. You can display the Preview tab to view the formatted references, you can open individual references to

make sure all information transferred to the correct fields, and you can easily edit or delete the new references.



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

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

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

Downloading Records from PubMed

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

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

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

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

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

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

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

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

Direct Export from Web Pages

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

Start by opening the EndNote library into which the data should be imported. This “direct export” or “direct download” method does away with the additional steps of saving the references to a text file, and then importing that file with the appropriate filter.

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

ALEPH	Los Alamos National Laboratory
American Psychological Association, PsycInfo Online	MicroPatent
Bibliotech.dk	Nature
BioMedCentral	Nerac
BioOne	NISC
Blackwell Synergy	OCLC
BMJ	OhioLink
Buffalo University	OVID
CABI-Direct	Oxford Press Journals
Canadian Journal of Communication	Pacific Northwest Labs

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

Exporting Records from Web of Knowledge and Web of Science

You can easily export bibliographic records from the *Web of Knowledge* platform. A subscription to *Web of Knowledge* is required.

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

1. From the Results page, click the check boxes to select the records that you wish to export to EndNote.
2. Go to the Output Records section of the page and select the option to output Full Record in step 2.
3. Click the EndNote button.
4. On the Processing page, click the Export button (Internet Explorer) to export the records to EndNote. If you are using Firefox, select Open With, and then click OK to export the records.
5. If a Choose Destination dialog opens, select EndNote, and then click OK.
6. At this point, the EndNote program opens, and the records are exported to a temporary group called Imported

References.

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

Related Sections in EndNote Help

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

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

Chapter 8: Searching an EndNote Library and Saving it as a Smart Group

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

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

Open the Sample Library

If EndNote is not already running, start it and open the library called Sample_Library_X5.enl as shown in “Start EndNote” on page 35.

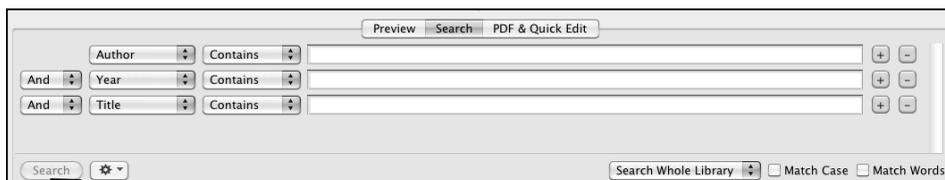
Search for a Set of References

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

To search for references:

1. Make sure that the All References group is displayed.
2. Click the Search tab.
3. The Search tab remembers the last search you entered. To clear it, use the Action menu (Macintosh) or the Options button (Windows) to select Restore Default.

Click the Action menu to display a list of options



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

Next, set up the search to find references dated from 2000 to 2010.

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

Your Search tab should look like this:



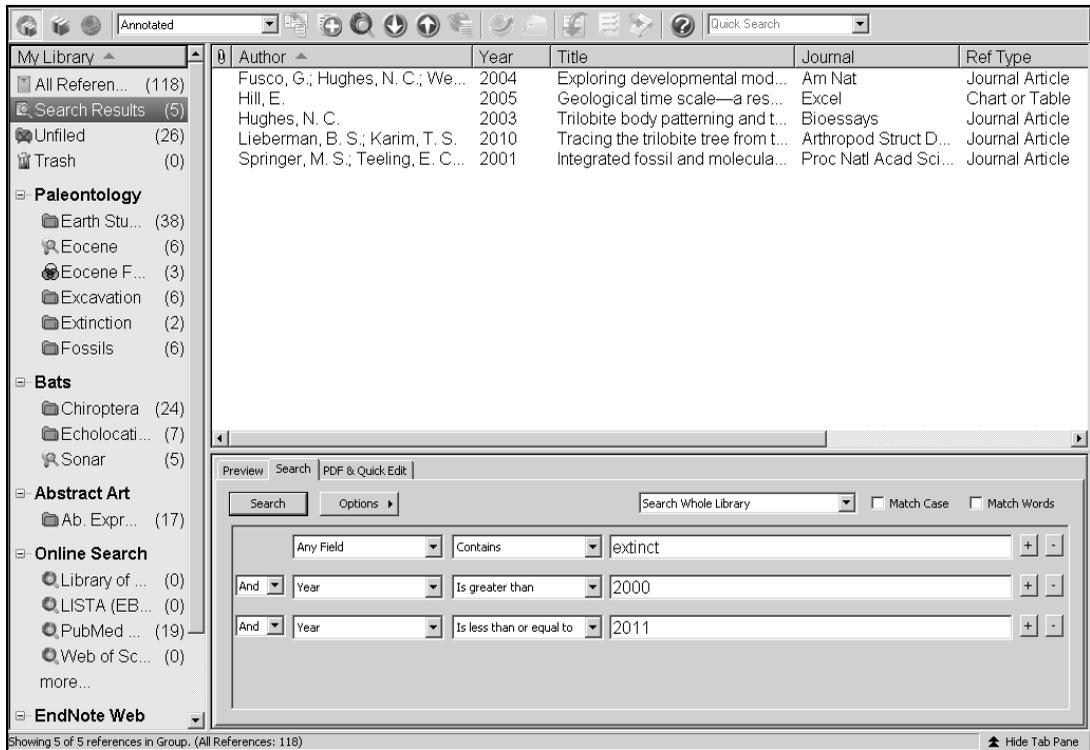
This search will find all references containing the text “extinct” that also were published between 2000 and 2011.

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

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

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

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



The status area at the bottom of the Library window should read, “Showing 5 of 5 references in Group.”

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

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

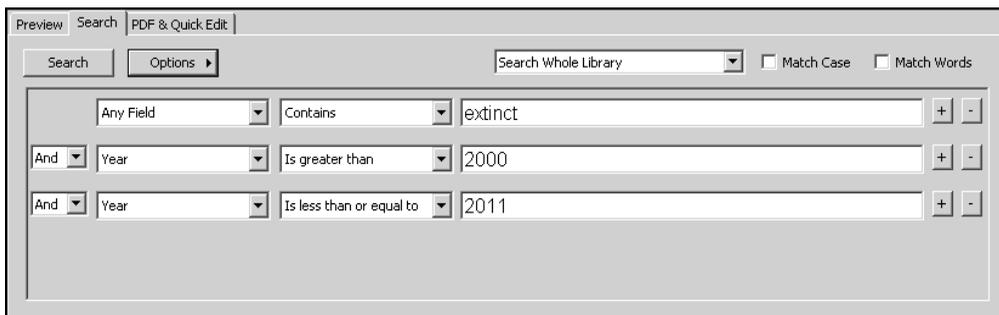
Create a Smart Group

You could create a custom group, and then drag your search results to the group, but as you entered new references into your library, you would need to manually keep updating the custom group. Instead, create a smart group that updates automatically.

The Search tab should still display the search strategy to find “extinct” and the publication years between 2000 to 2011.

To use the search strategy to create a smart group:

1. Click the Action menu (Macintosh) or the Options button (Windows), and then select Convert to Smart Group.



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

2. Type “Extinct” for the Converted Search title, and then press Return (Macintosh) or Enter (Windows).

If you have already clicked away from the editable title, you can Control+click (Macintosh) or right-click (Windows) on Converted Search, and then select Rename Group.

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

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

Create a Combo Group

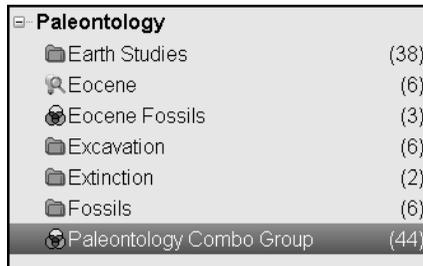
Let us assume that you want to combine all your custom groups and smart groups under the Paleontology group set in order to create a combination group.

To create a combination group:

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

Boolean operator.

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



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

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

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

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

Related Sections in EndNote Help

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

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

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

Continue with this part of the tour only if you use Microsoft Word 2008 or 2011 (Macintosh) or Microsoft Word 2003, 2007, or 2010 (Windows). If you use a different word processor, or if you have an older version of Word, see one of these EndNote Help topics to learn how to cite EndNote references and create bibliographies in your papers.

- ◆ OpenOffice.org Writer/Cite While You Write (Windows)
- ◆ RTF Files/Scanning and Formatting

EndNote's Cite While You Write feature inserts EndNote commands into Word's Tools menu (or on an EndNote tab in Word 2007 and 2010 for Windows) to give you direct access to your references while writing in Microsoft Word. The Cite While You Write commands enable EndNote to do bibliographic formatting to the document that is currently open in Word.

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

- ◆ Insert EndNote bibliographic citations into your paper and create a bibliography.
- ◆ Edit citations to suppress author names and add cited pages.

Open the Sample Library

If EndNote is not already running, start it and open the library called `Sample_Library_X5.enl` as shown in "Start EndNote" on page 35.

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

Open a Microsoft Word Document

Start Microsoft Word and open a new document.

While we are not using one for this tour, EndNote does include manuscript templates that make it easy to set up your paper for electronic submission to a publisher. When you use one of these templates to start your paper, many formatting issues are already set up for your target publication, such as proper margins, headings, pagination, line spacing, title page, font type, and font size.

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

Cite EndNote References

You are going to start entering some text and citations for this tour. This example assumes that your output style is set for Annotated. If not, we will show you how to select an output style in “Select a Bibliographic Style” on page 95.

To start writing your paper and inserting citations:

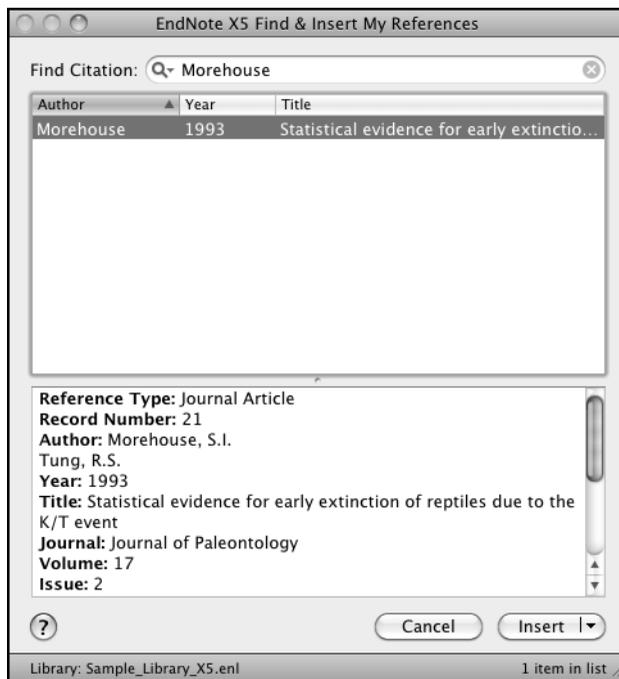
1. Open Word and enter the following text as though you were writing a paper.

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

Now you are ready to insert a citation.

2. From the Tools menu, go to the EndNote X5 submenu, and then click Find Citation(s).
Word 2007 and 2010: On the EndNote tab, click the Insert Citation icon.
3. The Find & Insert My References dialog appears. Type the author name “Morehouse” in the text box, and then click Find (Windows) or Return (Macintosh).

EndNote lists the matching references.



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

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

EndNote automatically creates a link from the citation to the bibliography. If you have multiple bibliographies (for example, one at the end of each chapter and one at the end of the document), you can link in-text citations to the reference list at the end of each section and/or chapter. See “Select a Bibliographic Style” on page 95 for information on how to turn this feature on and off.

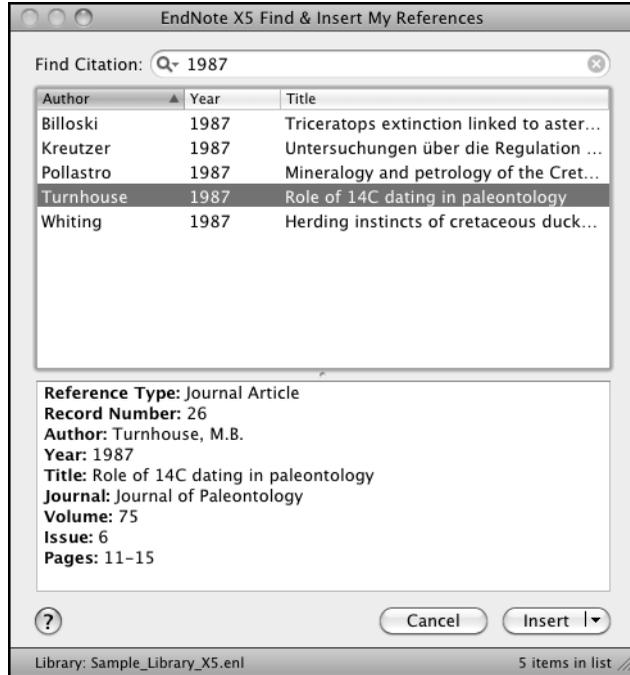
5. Add more text to the paper:

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

6. From the Tools menu, go to the EndNote X5 submenu, and then click Find Citation(s).

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

7. Type the date “1987” into the text box and then click Find (Windows) or Return (Macintosh). EndNote searches all fields and lists the matching references.



8. Select the reference by the author Turnhouse.
 9. Click the Down arrow on the Insert button to display a menu. Select the Insert & Display As: Author (Year) option.
- EndNote inserts a citation and Instant Formatting formats the citation in the currently selected style and adds it to a formatted bibliography at the end of the paper.

Your document text should look similar to this example.

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

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

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

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

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

Keep your document open in order to select a bibliographic style to continue the tour in "Select a Bibliographic Style" on page 95.

NOTE: You can also insert citations in footnotes. First, use the appropriate Word command to create the footnote. Then, insert the EndNote citation in the footnote. Word controls the placement and numbering of the footnote, and EndNote formats the citation based on the current style. You must select a style that formats footnotes; for example, Chicago 16th.

Select a Bibliographic Style

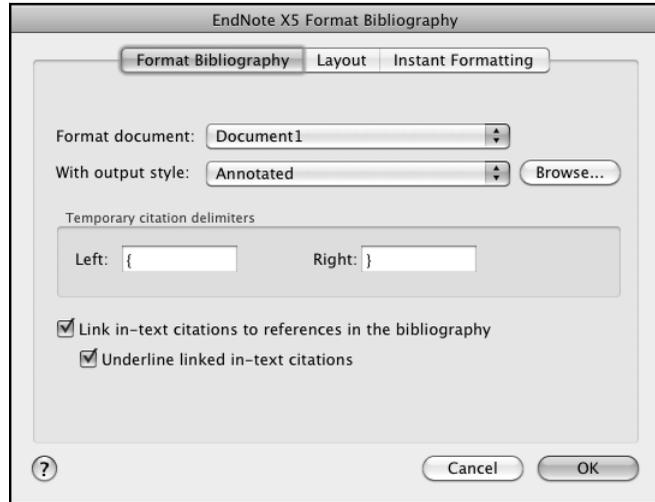
You can format your citations and bibliography as many times as you like, changing the output style and various other layout settings each time.

To select the bibliographic style used for formatting:

1. From the Tools menu, go to the EndNote X5 submenu, and then click Bibliography Settings.

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

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



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

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

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

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

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

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

Your document text should look similar to this example.

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

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

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

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

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

NOTE: More than 5,000 styles are available. To see the list of styles currently installed, select Output Styles from the Endnote X5 menu (Macintosh) or Edit menu (Windows), and then select Open Style Manager. The Style Manager includes a Get More on the Web button to easily locate and download individual styles. Or, you can install entire categories of styles with the EndNote Customizer (Macintosh) or installation program (Windows).

Edit a Citation

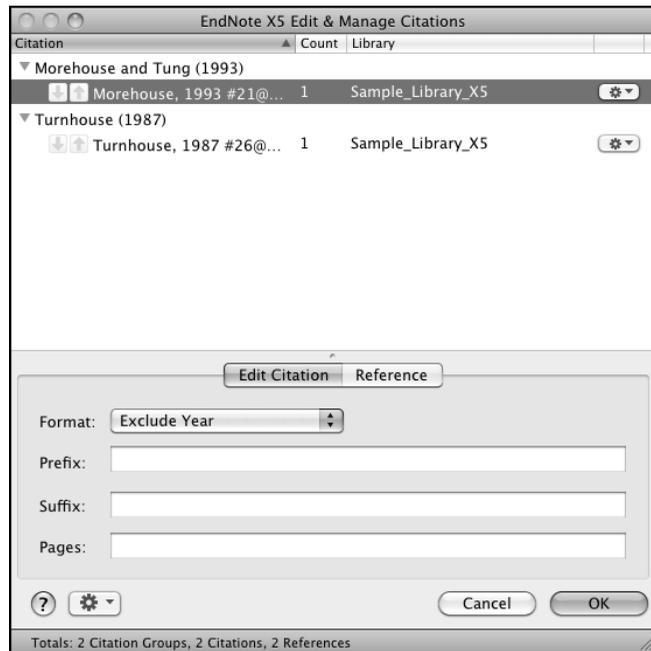
If you directly edit a citation or the bibliography, the changes will be lost when you Format Bibliography again because EndNote reformats according to the rules of the selected output style. To make and retain changes to all citations and/or the bibliography, modify the output style. However, if you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

For some bibliographic styles, the majority of references are cited in an "Author, Date" format; but if the author's name is mentioned within the paragraph text, the style dictates that the name not be repeated in the citation. In our example, we mention Morehouse and the date within the text of the paper.

To edit an individual citation:

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

Word 2007 and 2010: On the EndNote tab, in the Citations group, select Edit & Manage Citation(s).



3. Select the Edit Citation tab.
4. From the Format menu (Macintosh) or Formatting menu (Windows), Select the Exclude Year option.
5. Leave the Prefix, Suffix, and Pages field blank.
6. Click OK to update the citations in your paper.

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

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

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

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

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

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

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

Related Sections in EndNote Help

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

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

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