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MACINTOSH GETTING STARTED GUIDE



THOMSON REUTERS™

GETTING STARTED GUIDE

VERSION X6 FOR MACINTOSH

ABOUT THIS GUIDE

This guide provides a basic overview of using *EndNote*. It assumes that you know how to use your word processor and the Apple 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 X6* Help to view help topics. While using *EndNote*, press (?) to view a help topic about the current window.

A printable help guide called **EndNoteX6MacHelp.pdf** is available in the **EndNote X6** folder. It contains all the help topics compiled into a PDF file.

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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 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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CHAPTER 1:

WELCOME TO **ENDNOTE X6**

EndNote – Your Complete Reference Solution!

EndNote as an online search tool

You can search online bibliographic resources and retrieve references directly in your *EndNote* library. You can also export references directly to *EndNote* from your favorite online resource.

EndNote as 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.
- Locate full text PDF files or create a reference when importing a PDF file. Synchronize references and file attachments to your *EndNote Web* account.
- Share groups with other *EndNote* users easily and manage your ResearcherID publication list.

EndNote as a bibliography maker

Cite While You Write™ takes the pain out of citing and formatting references in Apple Pages '09 and Microsoft® Word. 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.

What's New in *EndNote X6*

The current release of *EndNote* includes the following new features:

- Update and synchronize the references in *EndNote* desktop and *EndNote Web* by the click of a button. Maintain and synchronize the references in your *EndNote* library with the references in your *EndNote Web* library even across multiple computers.
- Change Layout options to match your monitor and preferences, such as showing the Preview, Reference, and PDF Viewer panels on the right side of the screen to fit widescreen monitors.

- Open PDFs in a separate tabbed Reference / PDF window for viewing references or annotating PDF files.
- Apply a rating to each of your references. Search your *EndNote* library by selecting the Rating option from the Field list.
- Apply a Read or Unread tag to your references from the Library window or the Reference window in order to track which references you have reviewed during your research. Set preferences to have *EndNote* automatically mark references as read after viewing in the Reference, Preview, and PDF Viewer panels or after changing the rating of a reference.
- Copy or Move the contents of one field to another field without losing the original text formatting style.
- Change the case of field data for all references currently "showing" in the Library window by using the Change/Move/Copy Fields command.
- Select different author name formats for short forms of full reference footnotes.
- Edit full reference footnote citations to exclude author name, year, or author/year.
- E-mail a selected reference with or without file and figure attachments to your colleagues.
- Retrieve records in XML format from online search databases.

Education & Training—View Our What's New Video

Thomson Reuters recommends that you view our What's New video at www.endnote.com/training or on our YouTube channel at www.youtube.com/endnotetraining.

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 30 days, the demonstration version reverts to a feature-restricted *EndNote* Viewer.

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.

To purchase an unrestricted version of the *EndNote* program, open your trial version, and then click the **Yes** button when the *EndNote* dialog box 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.

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* 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

EndNote Online Help

Online Help

From *EndNote*'s Help menu, select ***EndNote X6 Help*** to view the various topics. For context-sensitive help, click the question mark (?) button found on various windows and dialogs.

Compiled Help PDF File

The online Help system is available as a compiled, printable PDF file. You can find the file in the online Help system in the help topic called Overview of Thomson Reuters *EndNote*.

It is also available at Applications/*EndNote X6* and is called [EndNoteX6MacHelp.pdf](#).

Release Notes

For documentation updates and correction notes, refer to the [Readme.txt](#) file installed in the *EndNote X6* 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: 1800 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) (Press 3 at the prompt)
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

Macintosh system, *EndNote*, and word processor. To find the *EndNote* version and serial number, start *EndNote* and select **About EndNote** from the *EndNote* menu.

For web / e-mail or phone contact:

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

Technical support tips are also available from:

- <http://science.thomsonreuters.com/support>
- *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.

You can also join the *EndNote* social network at the following Web sites:

- 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* is 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.

CHAPTER 2:

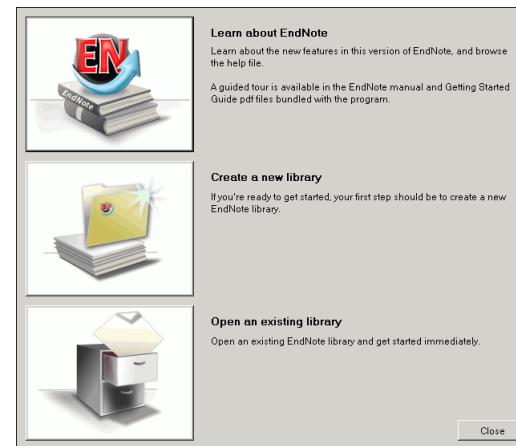
WORKING IN AN ENDNOTE LIBRARY

This chapter covers the following topics.

- Starting *EndNote* and opening the examples library
- Navigating the Library window
- Selecting a Library window layout
- Sorting references
- Selecting and opening a reference
- Closing a reference
- Working with PDF files
- Saving references to a custom group
- Synchronizing your *EndNote Library* with your *EndNote Web* library

Starting *EndNote* and Opening the Examples Library

When you first install *EndNote*, the following dialog automatically displays.



1. Click the **File Cabinet** button.
2. From the Applications folder, open the ***EndNote X6*** folder.
3. Open the **Examples** folder.
4. Select and open the compressed file called **Sample_Library_X6.enlx** to extract the uncompressed library files called **Sample_Library_X6.enl** and **Sample_Library_X6.Data**.

To create a new library:

1. From the Help menu, select the Show Getting Started Dialog command.
2. Click the Create a New Library button.

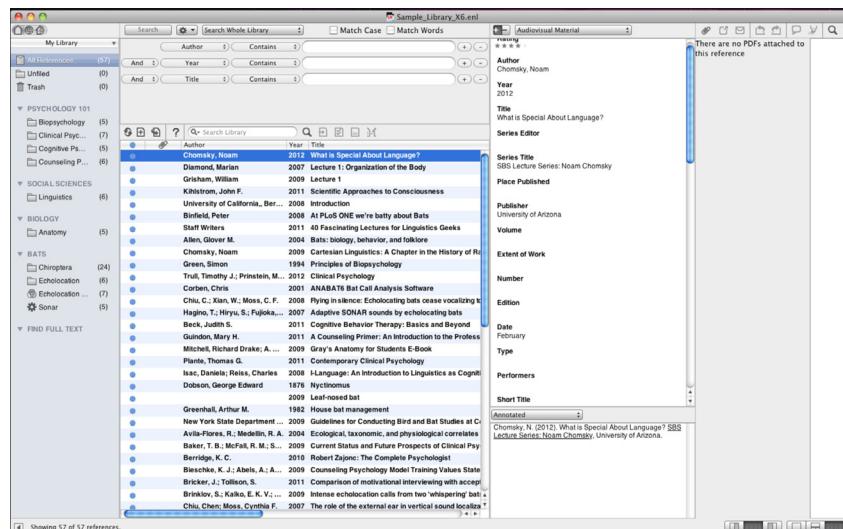
3. Enter a name to identify your new library.
4. Enter the destination on your hard drive where you want to save your new library.
5. Click the Save button to save your new library.

Navigating the Library Window

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

The Library window includes six work areas:

- Groups panel
- Reference List panel
- Preview panel
- Reference (Quick Edit) panel
- PDF Viewer panel
- Search panel



Groups Panel

Such As:

- Custom groups
- Smart groups
- Combination groups
- Permanent groups
- Temporary groups

Reference List Panel

This panel displays a multi-column list of references. By default, the first column in the reference list shows a Read/Unread indicator followed by:

- Paper clip icon (*for references that include an attached file*)
- Author's last name, first name, initial (*all names are shown*)
- Year
- Title
- Rating
- Journal name or secondary title
- Reference type
- URL
- Last updated

You can change the fields and the order of the fields that display in the reference list by selecting from the *EndNote X6* menu > Preferences > Display Fields.

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 Panel

You can easily see more details about a reference by highlighting the reference and selecting the Preview tab.

The Preview panel uses the current output style to display the selected reference as it is formatted in 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.

The Output Style menu displays your “favorite” output styles, but you can choose **Select Another Style** to pick from other installed files. A typical installation installs only the most popular output styles, but more than 5,000 output styles are available in *EndNote*.

Reference (Quick Edit) Panel

You can quickly edit your references by clicking inside the Reference panel. 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 Reference panel 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.

PDF Viewer Panel

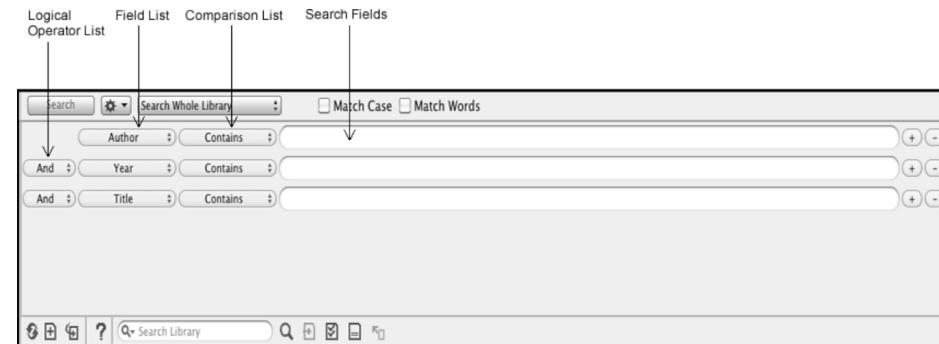
The PDF Viewer panel allows you to open and view PDF files attached to the current reference. See [Working with PDF Files](#) for more information.

Search Panel

The Search panel allows you to search for references from a particular *EndNote* library. By default, the Search panel displays at the top of the *EndNote* window. Click the **Show Search Panel** and **Hide Search Panel** buttons to toggle between the two views.

The Search panel consists of the following items:

- Logical Operator List
- Field List
- Comparison List
- Search Fields
- Action Menu
- Match Case
- Match Words



To begin a search of your *EndNote* library, select the group of references you want to search and then select **Search Library**.

To begin a search of an online database, go to the Tools menu and select **Online Search**.

Selecting a Library Window Layout

The options on the Library window depend on the layout that you select from the Layout menu located in the lower right-hand corner.

There are seven layout options from which to choose the layout view of the Library window.



- The fifth button (shaded) on the toolbar controls the Bottom view of the *EndNote* window.
- The sixth button on the toolbar controls the Right view of the *EndNote* window.

Right View: Select buttons 1 and 6 to display the Preview and Reference panels to the right of the Reference list in a columnar arrangement.

Right View – Show PDF Viewer: Select buttons 3 and 6 to display the PDF Viewer panel to the right of the Reference list in a columnar arrangement.

Right View: Show Both: Select buttons 2 and 6 to display the Preview, Reference, and the PDF Viewer panels to the right of the Reference list in a columnar arrangement.

Bottom View: Select buttons 1 and 5 to display the Reference and Preview panels below the Reference list in a split arrangement.

Bottom View - Show PDF Viewer: Select buttons 3 and 5 to display the PDF Viewer panel below the Reference list in a split arrangement.

Bottom View - Show Both: Select buttons 2 and 5 to display the Preview, Reference, and PDF View panels below the Reference list in a split arrangement.

Hide Panels: Select button 4 to display the Groups panel and the Reference list side-by-side. The Preview, Reference, and PDF Viewer panels are hidden from view.

Sorting References

You can sort references by clicking on a column heading such as Author, Year, or Title.

1. Click the **Author** column heading to change the current Author sort from ascending order to descending order.
2. Click the **Year** column heading to see the references sorted in descending order based on the year of publication.
3. Click the **Read / Unread** column heading to sort either your Read or Unread references to the top.
4. Click the **Author** column heading to return the sort order of the library to an alphabetical list sorted by the author names.

Selecting and Opening 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.

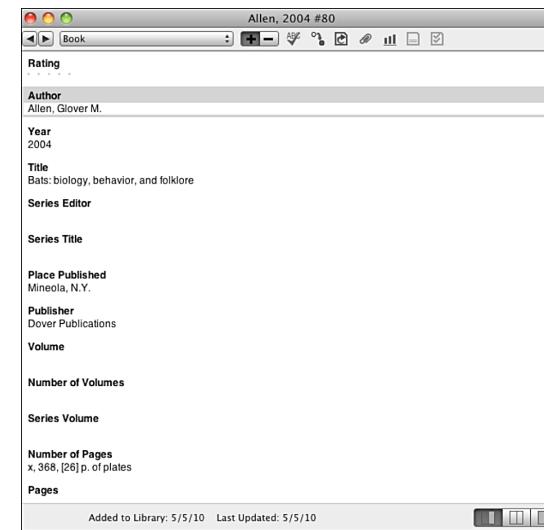
To see how this works, click any reference to select it.

Press the **Up** or **Down** Arrow to select the previous or next reference.

To find and display a reference:

1. Select the reference by Glover M. Allen. Now that the reference is selected, there are a number of things you can do such as view its contents, copy, cut, delete, or edit it.
2. Open the selected Allen reference by pressing the Enter key or by using the Edit References command on the References menu.

The Reference window opens to display all of the information associated with the reference. This is where you enter or edit information for a reference.



To view the rest of the reference:

- Use the mouse to scroll down the Reference window.
- Press the **Tab** key to move forward from one field to the next.
- Press **Shift+Tab** to move backward through the fields.
- Click the **Show Fields / Hide Fields** buttons (+ and -) to shift between showing all fields in the reference or only those fields that contain data.

Closing a Reference

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

- Click the red **Close** button in the upper left-hand corner of the Reference window.
- From the File menu, select **Close Reference**.
- From the keyboard, press **Command+W**. EndNote prompts you to save your changes.

Working with PDF Files

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

To attach a PDF file to a reference:

1. Select any reference in the Reference list.
2. Place your cursor inside the PDF Viewer panel.
3. Click the **Paper Clip** icon to open a file dialog.
4. Navigate to the folder **Applications / EndNote X6**.
5. Select the check box titled "**Copy this file to the default file attachment folder and create a relative link.**" EndNote makes a copy of the file to store with the library. The attached file is always available to you even when you move the library.
6. Select the file titled **EndNoteX6MacHelp.pdf**.
7. Click **Open** to insert the file into the selected reference.

Note that EndNote automatically opens the first PDF attached to a reference when you select the PDF Viewer panel. You can attach up to 45 files.

PDF Viewer Toolbar

A toolbar appears within the PDF Viewer panel that displays the following icons:



Move your cursor over an icon on the toolbar to see Title (hover) text to explain its function. For example, Title text for the first three icons displays the message:

- **PDF Attachments:** View and add PDF attachments.
- **Open PDF:** Opens the PDF in a reference window / Close this PDF's reference window.
- **Email PDF:** Attach a copy of this PDF to an e-mail.

You can also Control+click within an open PDF file to display a contextual menu that includes many of the options on the toolbar plus other options.

Adding Sticky Notes

1. Go to a section in the PDF where you want to add a comment.
2. Select the text where you want to insert a comment.
3. Select the **Sticky Note** icon from the toolbar.
4. Double-click the **Sticky Note** icon that appears in the PDF file to display a Sticky Note text box.
5. Enter your comments in the Sticky Note text box.
6. Click the **X** button that appears in the left-hand corner of the dialog to save your changes.

Highlighting Text

1. Go to the section in the PDF where you want to highlight text.
2. Select the text within the PDF that you want to highlight.
3. Select the **Highlight Text** icon. The background color of the selected text changes to yellow.
4. Click the **Close PDF** button in the toolbar to close and to save your changes.

Saving References to a Custom Group

The left panel 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 you have deleted from the library. They are not permanently eliminated until you empty Trash.

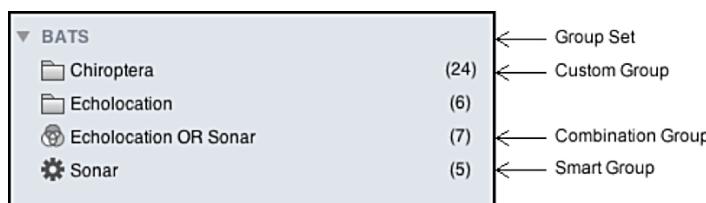


Note: This section of the Groups panel will change after you initiate the Sync process for the first time. See *Synchronizing Your EndNote Library with Your EndNote Web Library* for more information.

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

- You build a custom group by adding individual references to a group set.
- *EndNote* automatically compiles a smart group based on your search strategy.
- A combination group consists of references derived from a smart group search of the contents of existing custom and/or smart groups.

The sample library has several custom groups of references. Click the group names under the BATS group set in the left panel 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. Select one of the groups in the Psychology 101 group set so that a new group is created in that set.

2. From the Groups menu, select **Create Group**.

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

3. Type “**Biological Psychology**” as the group name, and then press **Enter** or click in the reference list area to save the change.

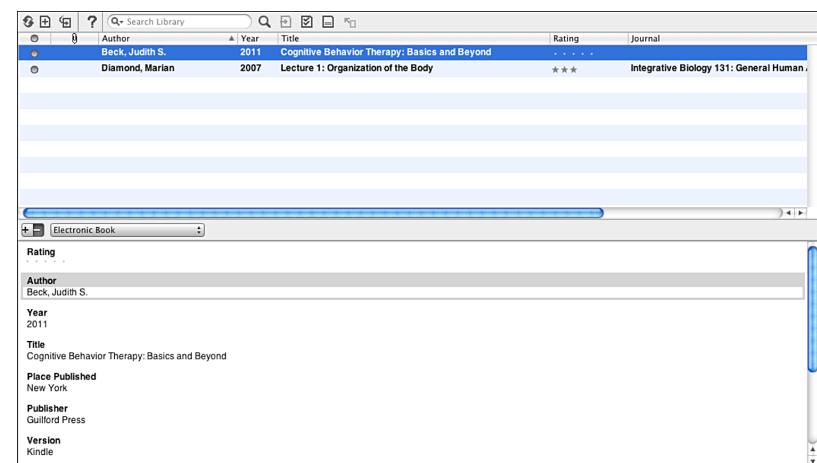
Note that there are no references in the new **Biological Psychology** group.

4. Select the **All References** group to display all references in the library.

5. In the Author column, highlight the reference by Beck and the reference by Diamond. To select noncontiguous references, hold down the **Command** key as you click on them.

6. Drag the selected references to the new **Biological Psychology** group and drop them on the title of the group.

7. Select the **Biological Psychology** group to display the two references now included in the group.



To move the group to a different group set:

1. Click the group title **Biological Psychology** to display the references within the group.
2. Drag and drop the group anywhere in the Biology group set.

To delete a custom group:

1. Control+click the **Biological Psychology** group name to display a contextual menu, and then select **Delete Group**
2. Click **Yes** when you are prompted to delete the group.

EndNote deletes only the group. No references are deleted from your library. Many of the commands for managing groups are available from the Groups menu and from the Control+click contextual menu.

Synchronizing Your *EndNote* Library with Your *EndNote Web* Library

Your purchase of *EndNote X6* entitles you to a two-year free subscription to *EndNote Web*.

The Sync feature allows you to synchronize the references in your *EndNote* desktop library with the references in your *EndNote Web* library. You must register and have an active *EndNote Web* account to initiate the Sync process.

I Already Have an *EndNote Web* Account

1. Click the Sync button in the toolbar to go to an *EndNote Web* Login dialog.
2. Enter your *EndNote Web* e-mail address.
3. Enter your *EndNote Web* password.
4. Click OK to initiate the Sync process.

Since you already have an *EndNote Web* account, *EndNote* populates the fields on the Sync Preferences page with the e-mail address and password that you entered on the *EndNote Web* Login dialog. Later you can change the data in these fields if you ever change your e-mail address or password.

The first time you synchronize your *EndNote* and *EndNote Web* libraries, *EndNote* copies all references in each library to the other. If you have the same references in both libraries, these references will result in duplicates in the synchronized libraries.

Use the Find Duplicates command under the References menu to find and remove duplicates after your first synchronization.

I Do Not Have an *EndNote Web* Account

Because you do not have an *EndNote Web* account, you must create one. Registration is fast and easy and activates your two-year *EndNote Web* account when completed.

1. Click the **Sync** button in the toolbar to go to an *EndNote Web* Login dialog.
2. Click the **Sign Up** button to go to a **User Registration dialog**.
3. Enter an e-mail address in the **User Registration dialog**. Retype your e-mail address, and then click the **Continue** button.
4. Enter your personal information in the required fields on the next User Registration form. For example, enter your name, a password, and a title.
5. Select the appropriate radio button to **Opt in** or **Opt out** for e-mail communication.
6. Click the **I Agree** button indicating that you agree to the Terms and Conditions.

Once you create your *EndNote Web* account, *EndNote* populates the fields on the Sync Preferences page with your e-mail address and password that you entered during registration.

Sync Status Button

After the Sync process completes, the Groups panel includes a Sync Status button.

Click the button to open the Sync Stats dialog to review information about the *EndNote* library that you selected to synchronize with your *EndNote Web* library. The dialog tells you the number of references and the number of file and figure attachments that *EndNote* updated during the last Sync process.

Sync Conflicts

If Sync conflicts occur during the Sync process, a Sync Conflicts group appears in the Groups panel.

A conflict occurs for a reference when you edit the reference in both *EndNote* and in *EndNote Web* between Syncs. As a result, *EndNote* does not know which one you want to keep.

Select the Sync Conflicts group to open the Resolve Sync Conflicts dialog where you can resolve conflicts between references in your *EndNote* library and your *EndNote Web* library.

CHAPTER 3:

SETTING ENDNOTE PREFERENCES

This chapter covers the following topics.

1. Setting Sync preferences
2. Setting a default library
3. Changing the library display font

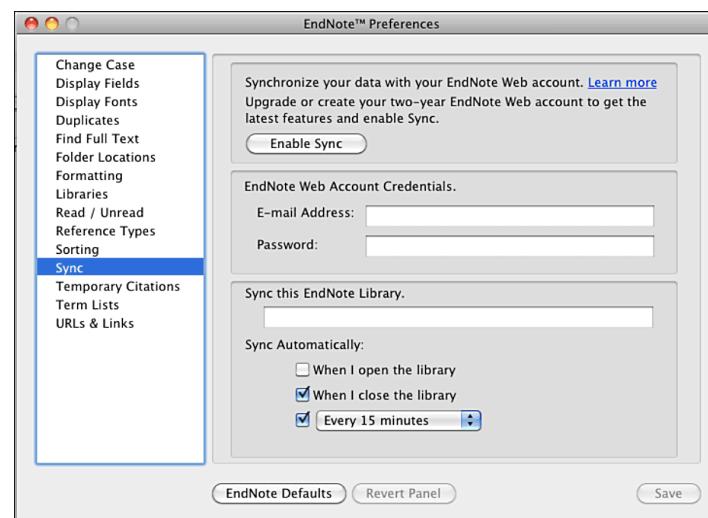
Setting Sync Preferences

Sync Preferences allow you to set preferences so that:

- You do not have to enter your e-mail address and password each time you synchronize your references between *EndNote* and *EndNote Web*.
- You can update your *EndNote* library with your *EndNote Web* library whenever you open or close your default *EndNote* library.
- You can have *EndNote* automatically begin the Sync process every 15, 30, or 60 minutes (or manually if you prefer).

1. Go to the *EndNote X6* menu, and then select **Preferences**.
2. Select the **Sync** option.
3. Click the **Enable Sync** button to activate your *EndNote Web* account.

See Synchronizing Your *EndNote* Library with Your *EndNote Web* Library for instructions on how to proceed.

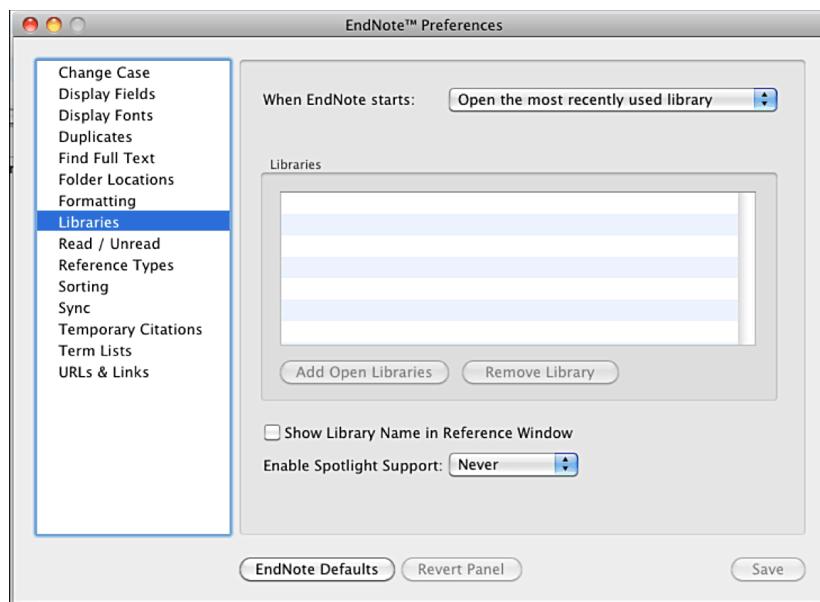


Once you create your *EndNote Web* account, *EndNote* populates the fields on the Sync Preferences page with your e-mail address and password that you entered during registration. Later you can change the data in these fields if you ever change your e-mail address or password.

Setting a Default 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_X6.enl) as your favorite library for now. Later, when you create your own library, you can set it as your favorite library.

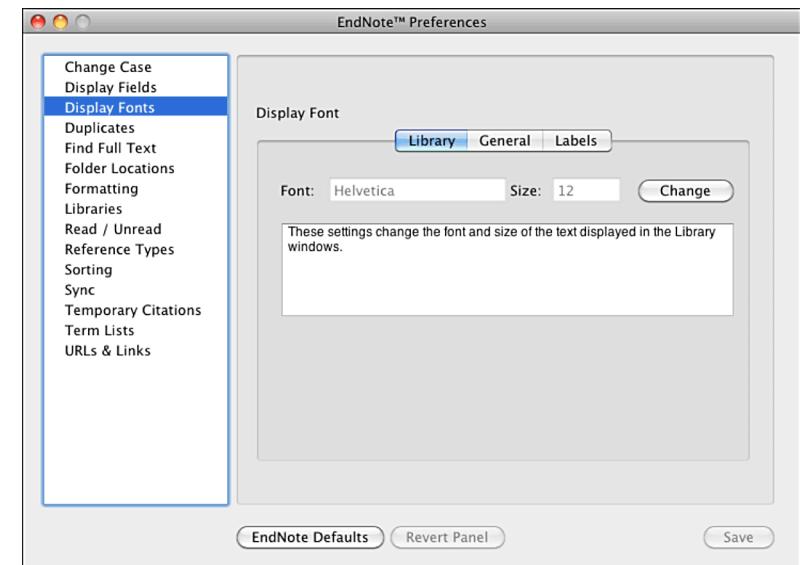
1. Go to the **EndNote X6 menu** and then select **Preferences**.
2. Select the **Libraries** option.
3. Select **Open** the specified libraries from the When *EndNote* Starts menu.
4. Click the **Add Open Libraries** button. You should see the full path and file name of the sample library listed at the top of the box.
5. Click the **Save** button to save this change.



Changing the Library Display Font

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

1. Go to the *EndNote X6* menu and then select **Preferences**.
2. Select **Display Fonts** to display a dialog with four tabs.
 - The **Library** tab determines the font and size *EndNote* applies to the references listed in the Library window.
 - The **General** tab determines the font *EndNote* applies when you enter text in a field in the Reference, Output Styles, Connection File, and Import Filters windows. It also determines the font *EndNote* applies to text that you view in the Previews panel or when you print and copy bibliographic information from *EndNote*.
 - The **Labels** tab determines the font and size *EndNote* applies to the Reference window field labels.
 - The **Search** tab determines the font and size *EndNote* applies when you enter text in a field on the Search panel.



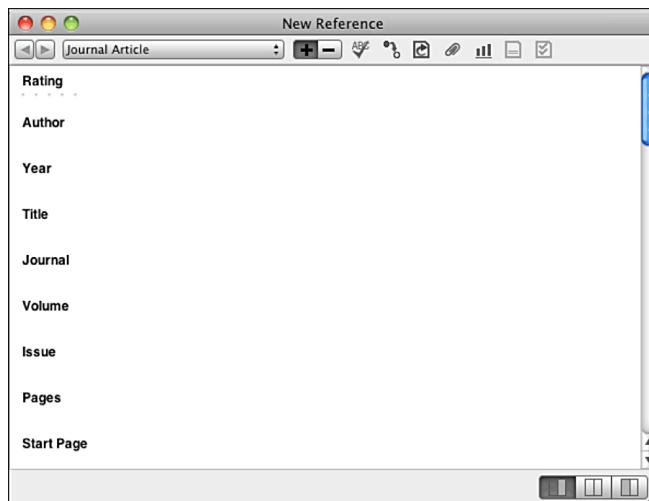
3. On the **Library** tab, click the **Change** button.
4. Select Tahoma or another font and font size. Close the Fonts dialog, and then click **OK** to save the change.
5. On the **General** tab, click the **Change** button.
6. In the Font list, select Tahoma or another font and font size. Click **Save** to save the change.
7. Click **OK** to leave the Preferences dialog.

CHAPTER 4:

CREATING A NEW REFERENCE

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

1. From the **References** menu, select **New Reference** to display an empty Reference window.



New references appear as **Journal Article**, the default setting. You can change the reference type to another type using the Reference Type list at the top of the Reference window. You can also change the default reference type from *EndNote* Preferences.

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.

Note that three reference types (Figure, Chart or Table, and Equation) are available specifically for cataloging picture files and object files.

You can add File Attachments, Figures, and Captions to any reference type.

Set the reference type back to **Journal Article**.

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

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

Tiberius Rex

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

Note: You can turn on or off the auto-complete feature with *EndNote* Term List 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 **Enter**.

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, *EndNote* adds the name to the Author term list and the red text will change to black.

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

Judith S. Beck

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.

Press **Enter** 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 **Enter**.

- d. For the fourth author's name, 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. 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) is entered into the reference. EndNote adds the necessary punctuation to the references when it creates a bibliography.

Note that you can enter up to 64 K of text into the Abstract and Notes fields, which amounts to 10-12 pages of 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 X6*.
- b. Notice the check box titled **Copy this file to the default file attachment folder** and create a relative link. Make sure that you select this box 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 your 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.

Notes:

- In the Groups panel, notice that one reference appears in the Unfiled group. Select the Unfiled group to display the Tiberius Rex reference.
- You can easily locate those references that contain attached files by clicking the paper clip icon in the second column heading. *EndNote* sorts all records containing attached files to the top of the list.

CHAPTER 5:

SEARCHING AN ENDNOTE LIBRARY

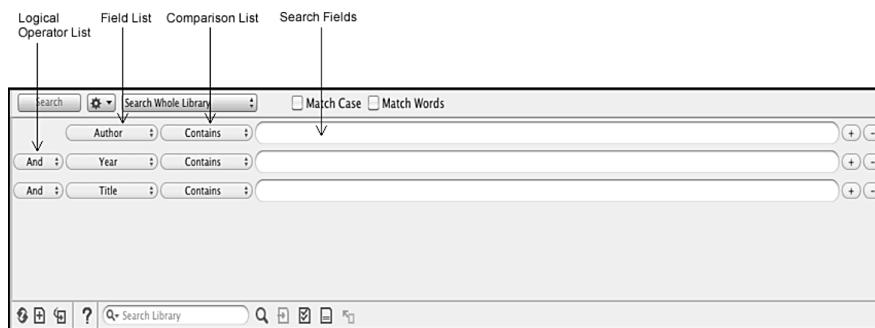
This chapter covers the following topics.

- Searching for a set of references
- Creating a smart group
- Creating a combination group

Searching for a Set of References

Let us assume that you want to generate a list of all references found in the sample library on Bats that were published from 2000 to 2012.

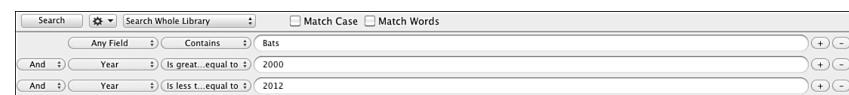
1. Select the **All References** group to display all references in the library.
2. Click the **Advanced Search** button if the Search panel is not already showing.



On the first search line:

- a. In the Field list, select **Any Field**. This means that *EndNote* will search all fields.
- b. In the Comparison list, the Contains comparison operator means that *EndNote* will search for the string of text anywhere in a field.
- c. Type "bats" as the first search term in the Search Fields text box.

3. 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.
4. 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 "2012" as the search term.
5. 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. The Search panel should look like this:



This search will find all references published between 2000 and 2012 that contains the text "bats".

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

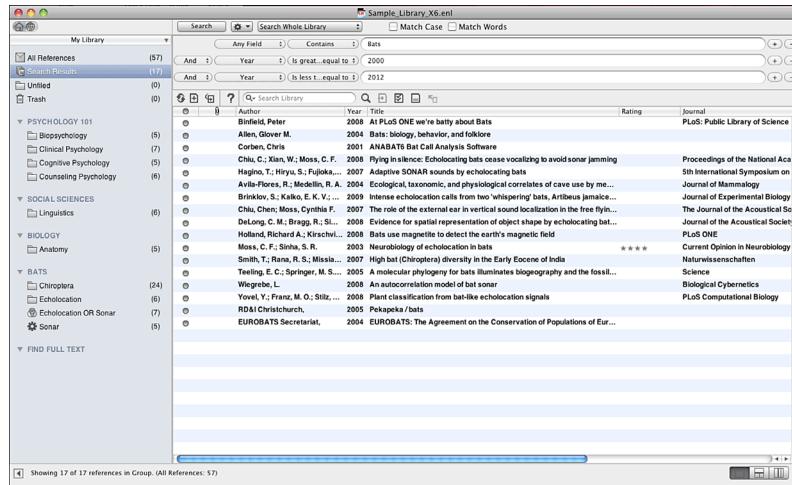
Match Case: This option would limit our search to "bats" in lowercase. If it were found capitalized at the beginning of a sentence, or all uppercase, it would not match the search.

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

6. 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 17 of 17 references in Group".

Notice in the Groups panel that *EndNote* automatically retains the results in a Search Results group set. This makes it easy to display other sets of references, but still go back and display your most recent search results.



EndNote replaces this temporary Search Results group the next time you run a search on the library. When you close the library, *EndNote* removes the group.

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

Creating a Smart Group

You could create a custom group, and then drag your search results to the group. However, this will result in needing to keep updating the custom group as you enter new references into your library. Instead, create a smart group that updates automatically.

The Search panel should still display the search strategy to find "bats" for publication years 2000 to 2012.

To use the search strategy to create a smart group:

1. Click the Action menu, and then select **Convert to Smart Group**. A Converted Search smart group is created under the first custom group set, Psychology 101.
2. Type "**Bats 2000-2012**" for the Converted Search title, and then press **Enter**.

If you have already clicked away from the editable title, you can **Control+click** on Converted Search, and then select **Rename Group**.

Each time you add a reference library or edit a reference, *EndNote* updates the smart group as needed.

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

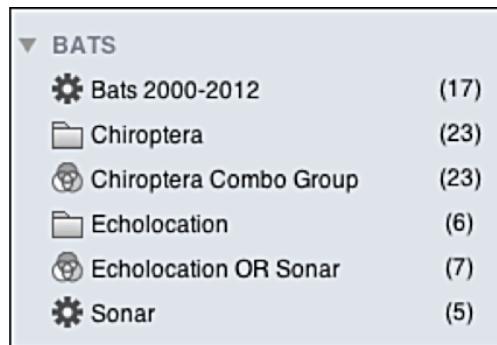
3. Drag the "**Bats 2000-2012**" smart group to the Bats group set.

Creating a Combination 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. Select the **Chiroptera** custom group from the Bats group set.
2. From the Groups menu, select **Create from Groups** to open a dialog.
3. In the Group Name field, type “**Chiroptera Combo Group**”.
4. Go to the “**Include References In**” fields section of the dialog. In the first field, select **Chiroptera** from the Bats group set menu.
5. In the second field, select **Echolocation** from the Bats group set menu.
Select the **OR Boolean** from Logical Operator list.
6. In the third field, select the **Sonar** smart group from the Bats group set menu.
Select the **OR Boolean** from the Logical Operator list.
7. Click the **Create** button to save your changes. Your combination group should appear in the Groups panel.



Your combined group should contain 24 references from the following custom groups and smart groups:

- Chiroptera
- Echolocation
- Sonar

CHAPTER 6:

SEARCHING AN ONLINE DATABASE

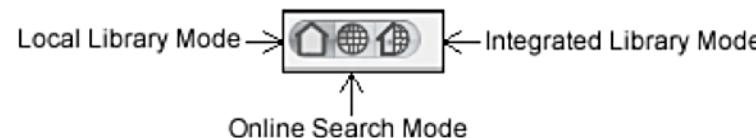
With the Online Search command, you can search online bibliographic databases just as easily as you can search an *EndNote* library on your own computer. You can download the results of your searches into a temporary *EndNote* library or directly into your own *EndNote* library.

This chapter covers the following topics:

- Selecting a display mode
- Searching a database
- Reviewing references
- Deleting references
- Finding full text for a reference

Selecting a Display Mode

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



Local Library Mode

Displays automatic groups, custom groups, and smart groups, but not Online Groups. This mode keeps you from inadvertently downloading references found during an online search into your currently open library. This is the default mode.

Online Search Mode

In this 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 library. You can then review the references without affecting your local library.

Integrated Library & Online Search Mode

In this mode, all local library commands and groups are available. When you download references from an online database, *EndNote* saves them to a group under the Online Search group set and to your open library.

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

Note: We recommend that you use Online Search Mode if you do not want the references downloaded to the All References group.

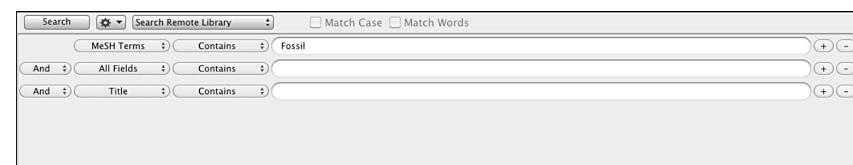
Searching a Database

The next step is to enter the search terms to find the references you need. Searching an online database is very similar to searching an *EndNote* library.

1. In the Groups panel, select **PubMed (NLM)**. Make sure you are working in Integrated Mode in order to see the PubMed (NLM) option.

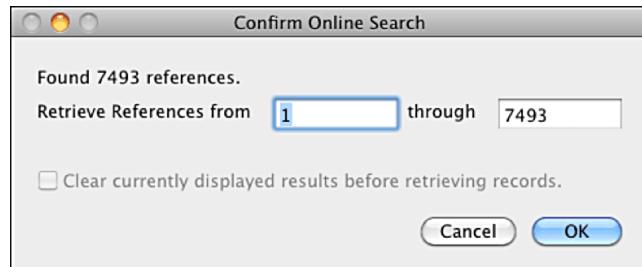
You can also go to the Tools menu and select **Online Search** to bring up the Choose a Connection dialog. Select **PubMed (NLM)** from the dialog.

2. Set the Field list for the first line to **MeSH Terms**, and enter "**fossil**" in the search field. The Comparison list for online searches is always set to Contains.



Click **Search**.

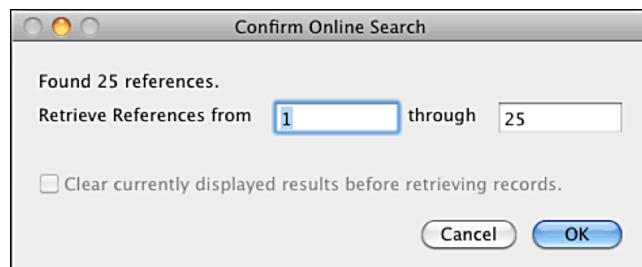
EndNote sends the search request off to the online database and displays a summary of the search results.



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

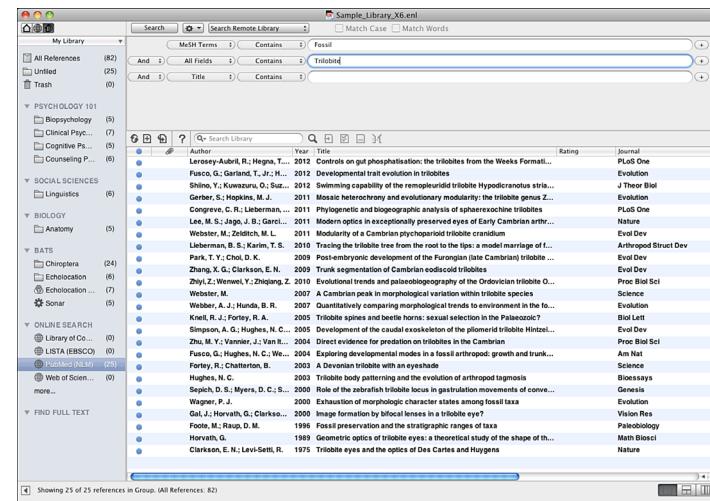
If the result set seems too many, you can refine the search by clicking the **Cancel** button.

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



This time the system finds fewer references.

7. Click **OK** to retrieve and save the matching references.



EndNote downloads the references to the All References group and to a temporary PubMed (NLM) group.

Notes:

- The PubMed Web site is updated regularly, so you may find a different number of references than illustrated here.
- The temporary PubMed (NLM) group will reset back to zero references when you close the library.

Reviewing References

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 panel or the Reference panel.

To review the new references:

1. Select a reference from the Reference list.
2. Click in the Preview panel to display the reference.
3. 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. In the Preview panel, 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.

Deleting References

Because you are working in the Integrated Mode display, *EndNote* downloads the references directly into the open library. You should delete any references you do not want.

Note: If you had downloaded references in Online Search Mode, the references would be in a temporary library. You would then 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 and clicking on the individual references.
2. From the References menu, select **Move References to Trash**. *EndNote* removes the selected references from the library and moves them to the Trash group.

While the references are 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

References 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. To delete the references from *EndNote*, click the **Trash** group, and then go to the References menu to select **Empty Trash**.
4. Click **Yes** to confirm the deletion.

Finding Full Text for a Reference

Many online sources now supply both bibliographic information and the full text of the document you are referencing. *EndNote* locates full text files on the Web by using data stored in your references. Once found, *EndNote* downloads and attaches the files to the references.

Note that you can find the full text for a single reference or up to 250 references.

To find the full text for a reference:

1. Select **All References** from the Groups panel.
2. Sort your references by author name in ascending order.
3. Select the first 20 references in the Reference list.
4. 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.

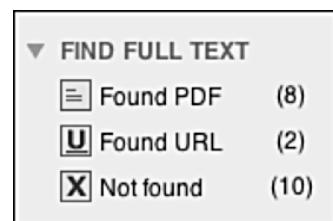
5. Click **OK** to begin the Find Full Text search.

In the left-hand column, under the Find Full Text group set, 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, *EndNote* removes the Searching group. Depending on the results, you may see a combination of three different groups under the Find Full Text group set.

- Found PDF
- Found URL
- Not found

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



In the reference list, you can see that each of the eight references now have a paper clip icon next to it indicating an attached file.

	Author	A/Year	Title	Rating	Journal
		2009	Leaf-nosed bat		Encyclopedie Britannica
		2012	Experts: Lawrence Steinberg		Big Think
	Allen, Glover M.	2004	Bats: biology, behavior, and folklore		Journal of Mammalogy
	Amorim-Pinto, R.; Medellin, R. A.; ...	2009	Current Status and Future Prospects of Clinical Psychopathology: Toward a S...		Psychol Sci Public Interest
	Baker, T. B.; McHail, R. M.; ...	2009	Current Status and Future Prospects of Clinical Psychopathology: Toward a S...		Cognitive Behavior Therapy: Basics and Beyond
	Beck, Judith S.	2011	Cognitive Behavior Therapy: Basics and Beyond		Emot Rev
	Berridge, K. C.	2010	Robert Zajonc: The Complete Psychologist		Counseling Psychologist
	Bieschke, K. J.; Abela, A. J.; ...	2009	Counseling Psychology Model Training Values Statement Addressing ...		PLoS: Public Library of Science
	Bindfied, Peter	2008	All PLoS ONE we're batzy about Bats		Behav Cogn Psychother
	Bricker, J.; Tollison, S.	2011	Comparison of motivational interviewing with acceptance and commit...		Journal of Experimental Biology
	Brinkov, S.; Kalko, E. K. V.; ...	2009	Intense echolocation calls from two 'whispering' bats, <i>Artibeus jamaicensis</i>		The Journal of the Acoustical Society of America
	Cherry, Kendra	2012	What is Biopsychology?		Proceedings of the National Academy of Sciences of the United States of America
	Chiu, Chen; Moss, Cynthia F.	2007	The role of the external ear in vertical sound localization in the free flying...		SBS Lecture Series: Noam Chomsky
	Chiu, C.; Xian, W.; Moss, C. F.	2008	Flying in silence: Echolocating bats cease vocalizing to avoid sonar jamming		Nature
	Chomsky, Noam	2009	Cartesian Linguistics: A Chapter in the History of Rationalist Thought	***	Clin Pract Epidemiol Men Health
	Chomsky, Noam	2012	What is Special About Language?	****	PLoS One
	Clarkson, E. N.; Levi-Seth, R.	1975	Trilobite eyes and the optics of Des Cartes and Huygens		
	Compare, A.; Germani, E.; Pr...; 2011	Clinical Psychology and Cardiovascular Disease: An Up-to-Date Clinic...			
	Congreve, C. R.; Lieberman, ...	2011	Phylogenetic and biogeographic analysis of sphinxorrhine trilobites		
	Corben, Chris	2001	ANABATs Bat Call Analysis Software		

Select one of the references in the Library window, and then open the PDF file in the PDF Viewer panel.

CHAPTER 7:

IMPORTING AND EXPORTING REFERENCES

Online searching is the easiest way to retrieve references from online databases, but not all information providers offer this option.

If you have access to an online bibliographic database or 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.

This chapter covers the following topics:

- Searching a database and saving the references
- Selecting an import filter and importing data into *EndNote*
- Downloading records from PubMed
- Exporting records from *Web of Knowledge* and *Web of Science*

Searching a Database and Saving the References

Often when you search a database, the matching references display 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, you must consistently tag each piece of the information so that *EndNote* can direct it 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 section of the tour, we will use a text file of *PubMed* references that we 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 - publish
SO - Genes Dev. 2008 Jan 15;22(2):121-4.
    
```

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

Selecting an Import Filter and Importing Data into EndNote

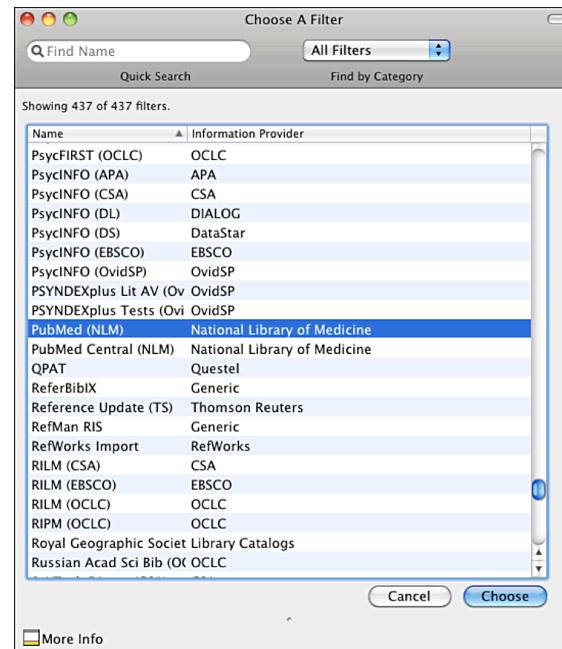
Once you have captured and saved your data file in a tagged format, you need to identify the proper *EndNote* filter to import the data. There are hundreds of filters included with *EndNote*. Each filter is designed to read a specific tagged format from a specific information provider.

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

1. Go to the **All References** folder in the Groups panel.
2. From the File menu, select **Import File**.
3. Select the **Application** folder.
4. Select the *EndNote X6* application.
5. Select the **Examples** folder.
6. Select the **pubmed_results.txt** file.
7. Go to the bottom of the dialog.

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

8. Quickly type "PubMed" to jump to the filter in the list.



9. With the **PubMed (NLM)** filter highlighted, click the **Choose** button.
10. 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.

11. Click **Import** to import the file.

Notice that the focus in the Groups panel has switched from the All References group to the Imported References group.

The following references should appear in the Imported References group.

Author	Year	Title	Rating	Journal
Cooper, K. L.; Tabin, C. J.	2008	Understanding of bat wing evolution takes flight		Genes Dev
Sears, K. E.; Behringer, R. R....	2006	Development of bat flight: morphologic and molecular evolution of bat wing digits		Proc Natl Acad Sci U S A
Springer, M. S.; Teeling, E. C....	2001	Integrated fossil and molecular data reconstruct bat echolocation		Proc Natl Acad Sci U S A

Note: The Imported References group is a temporary group. It is replaced each time you import a new set of references. *EndNote* removes the group when you close the library. The references themselves remain in the library unless you specifically delete them.

Exporting Records Directly from PubMed to EndNote

Many information providers have a direct export option that allows you to send copies of references directly to an *EndNote* library. The direct export process automatically selects an *EndNote* import filter to map bibliographic information into the appropriate *EndNote* fields. All you need to do is select the *EndNote* library into which the data should be imported.

1. Go to the PubMed Web site in your Web browser at <http://www.ncbi.nlm.nih.gov/pubmed>.
2. In the **Search** field, enter your search criteria to execute your search.
3. Click the **Search** button.
4. Select the needed results, and then select **Citation Manager** from the "Send to" menu.
5. Click **Create File** to export your selected records directly to *EndNote*.

The selected PubMed records will appear in a temporary group called Imported References in the Groups panel. Select the references and move them to a group within your open library.

Take note that *EndNote* will remove the temporary library and all the PubMed records if you close the *EndNote* library before you moving them to one of your permanent groups.

Exporting Records Directly from Web of Knowledge to EndNote

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, and Author 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 the Open With radio button, and then click OK to export the records.
5. If a **Choose Destination** dialog box opens, select *EndNote*, and then click OK.
6. At this point, the *EndNote* program opens, and the system exports the records to a temporary group called Imported References.

Searching for Surnames that Contain Particles and Spaces

When searching a *Web of Knowledge* product database (for example, *Web of Science*), always add a connector to author names that contains particles and spaces.

For example, to search for **de Bruyn A** from the Search panel, enter the name in the Search field as **de+Bruyn+A** to ensure that the product returns all relevant results.

To search for **de la Rosa**, enter the name in the Search field as **de+la+Rosa**. You can also add a first name to restrict your search, but *do not* add a connector between the first name and the last name. For example, to search for **Mario de la Rosa**, enter in the Search field **Mario de+la+Rosa**.

CHAPTER 8:

USING ENDNOTE WHILE WRITING A PAPER IN MICROSOFT WORD

Continue with this part of the tour if you use Microsoft Word 2008 or 2011.

EndNote's *Cite While You Write* feature inserts an *EndNote X6* submenu that is accessible from the Tools menu in Word 2008 and 2011. These commands 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.

This chapter covers the following topics:

- Inserting *EndNote* References
- Selecting a bibliographic style
- Editing a citation

Inserting *EndNote* References

Open a new document in Microsoft Word.

We 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 Selecting a Bibliographic Style.

1. Enter the following text as though you were writing a paper:

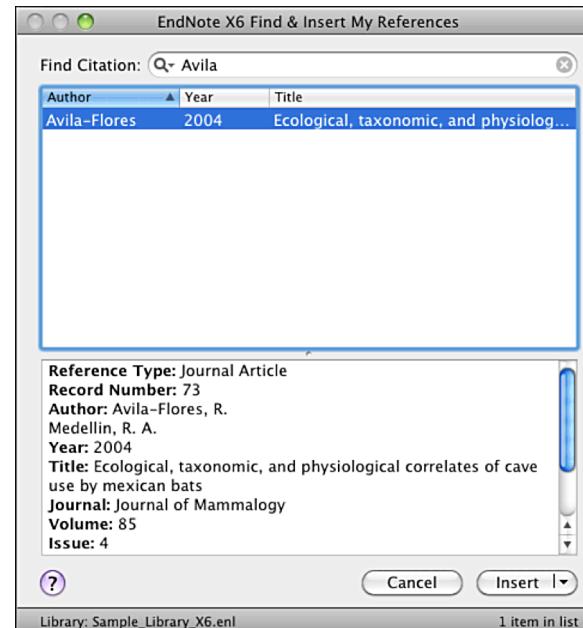
Bats

Bats are mammals of the order Chiroptera from the Greek "hand" and "wing" whose forelimbs form webbed wings, making them the only mammals naturally capable of true and sustained flight.

Place your cursor at the end of the sentence. That is where you will insert a citation.

2. From the **Tools** menu, go to the *EndNote X6* submenu, and then click *Find Citation(s)*.
3. The **Find & Insert My References** dialog box appears. Type the author name "Avila" in the text box, and then press the **Return** key.

EndNote lists the matching references. The full name Avila-Flores appears in the dialog.



- Click the **Down Arrow** on the Insert button to display a menu. Select the Insert 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 Selecting a Bibliographic Style for information on how to turn this feature on and off.

- Add more text to the paper:

Bats represent about 20% of all classified mammal species worldwide with about 1,240 bat species divided into two suborders.

Place your cursor at the end of the sentence. That is where you will insert another citation.

- From the **Tools** menu, go to the *EndNote X6* submenu, and then click **Find Citation(s)**.

- Type the date “2008” into the text box, and then click the **Return** button. *EndNote* searches all fields and lists the matching references.



- Highlight the reference by the author Holland.

9. Click the Down Arrow on the **Insert** button to display a menu.

Select the **Insert** option.

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

Bats

Bats are mammals of the order Chiroptera from the Greek "hand" and "wing" whose forelimbs form webbed wings, making them the only mammals naturally capable of true and sustained flight. Bats do not flap their entire forelimbs, as birds do, but instead flap their spread-out digits, which are very long and covered with a thin membrane or patagium. (Avila-Flores and Medellin 2004) Bats represent about 20% of all classified mammal species worldwide with about 1,240 bat species divided into two suborders. (Holland, Kirschvink et al. 2008)

Avila-Flores, R. and R. A. Medellin (2004). "Ecological, taxonomic, and physiological correlates of cave use by mexican bats." *Journal of Mammalogy* 85(4): 675-687.

Holland, R. A., et al. (2008). "Bats use magnetite to detect the earth's magnetic field." *PloS One* 3(2): e1676, 1671-1676.

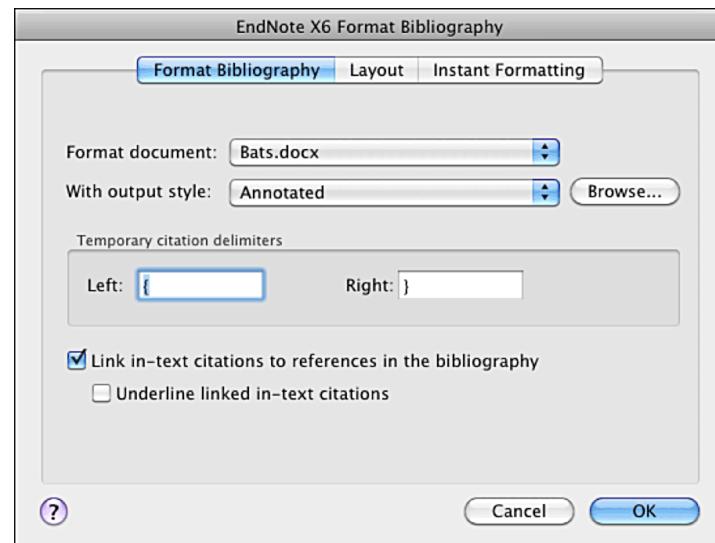
Note: You can also insert citations in footnotes. First, use the appropriate Word command to create the footnote. Then, insert the *EndNote* citation in the footnote. Word controls the placement and numbering of the footnote and *EndNote* formats the citation based on the current style.

Selecting a Bibliographic Style

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

- From the **Tools** menu, go to the *EndNote X6* submenu, and then click **Bibliography Settings**.

The Format Bibliography dialog box 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.

- 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.

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

Your document text should look similar to this example.

Bats

Bats are mammals of the order Chiroptera from the Greek "hand" and "wing" whose forelimbs form webbed wings, making them the only mammals naturally capable of true and sustained flight. Bats do not flap their entire forelimbs, as birds do, but instead flap their spread-out digits, which are very long and covered with a thin membrane or patagium. ([Avila-Flores and Medellin 2004](#)) Bats represent about 20% of all classified mammal species worldwide with about 1,240 bat species divided into two suborders. ([Holland, Kirschvink et al. 2008](#))

Avila-Flores, R. and R. A. Medellin (2004). "Ecological, taxonomic, and physiological correlates of cave use by mexican bats." [Journal of Mammalogy](#) 85(4): 675-687.

Holland, R. A., et al. (2008). "Bats use magnetite to detect the earth's magnetic field." [PloS One](#) 3(2): e1676, 1671-1676.

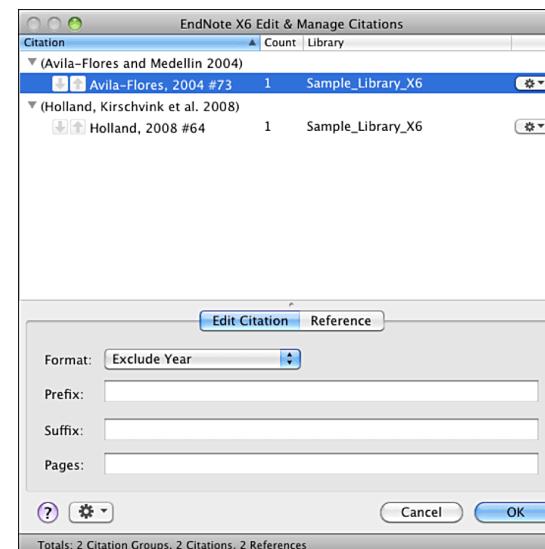
Note: In the future, if you need to make changes to the paper such as adding or deleting citations or text, just do the necessary updates in your paper. If you want to change the output style or bibliography layout settings, select the Format Bibliography command again. *EndNote* will reformat the in-text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

Editing a Citation

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. However, if the author's name is mentioned within the paragraph text, the style dictates that the name not be repeated in the citation.

1. Click **anywhere** on the Avila-Flores citation.
2. From the **Tools** menu, go to the *EndNote X6* submenu, and then click **Edit & Manage Citation(s)**.



3. Select the **Edit Citation** tab.
4. From the **Format** menu, select the **Exclude Year** option.
5. Leave the **Prefix**, **Suffix**, and **Pages** fields blank.
6. Click **OK** to update the citations in your paper.
7. Click **anywhere** on the Holland citation within Word.

8. Control-click to bring up a contextual menu.
9. Select the **Edit Citations > Exclude Year** command.

Your document text should look similar to this example.

Note that the date is gone from the Avila-Flores citation.

Bats

Bats are mammals of the order Chiroptera from the Greek "hand" and "wing" whose forelimbs form webbed wings, making them the only mammals naturally capable of true and sustained flight. Bats do not flap their entire forelimbs, as birds do, but instead flap their spread-out digits, which are very long and covered with a thin membrane or patagium. (Avila-Flores and Medellin) Bats represent about 20% of all classified mammal species worldwide with about 1,240 bat species divided into two suborders. (Holland, Kirschvink et al.)

Avila-Flores, R. and R. A. Medellin (2004). "Ecological, taxonomic, and physiological correlates of cave use by mexican bats." *Journal of Mammalogy* 85(4): 675-687.

Holland, R. A., et al. (2008). "Bats use magnetite to detect the earth's magnetic field." *PloS One* 3(2): e1676, 1671-1676.

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

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