

Thomson Reuters

# EndNote® X4

***Advance your Research and Publish Instantly***

**Cite While You Write™ in 4,500+ bibliographic styles!**

**Collect references and find full text**

**Collaborate with others using EndNote Web**

**Present your papers in ResearcherID**

## Getting Started Guide



THOMSON REUTERS

# EndNote®

## Version X4 for 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 Windows operating system. For help on these topics, consult your computer guide or your word processor manual.

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



# Introduction: Welcome to Thomson Reuters EndNote X4

## 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 for managing related materials. EndNote can locate full text PDF files for you or create a reference when importing a PDF file. Transfer references 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 presentation software using Format Papers (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 X4” 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 Demo Version of EndNote and the EndNote Viewer

If you are working with the demonstration version of EndNote X4, you have 30 days after you first use the program to evaluate

EndNote and all of its features. After those 30 days, the Demo version will revert to a feature-restricted *EndNote Viewer*.

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

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

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

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

To purchase an unrestricted version of the EndNote program, open your trial version and 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 X4.

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

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 right-click menu, from a toolbar icon, or with a keyboard command. In most cases, this manual gives instructions for selecting commands from the main

menus. If a menu command has a keyboard equivalent, the keyboard command appears next to the menu item.

The following representations for key combinations are used:

<u><b>Instruction</b></u>	<u><b>Explanation</b></u>
CTRL+ESC	While holding down the CTRL key, press the ESC key.
CTRL+ALT+ENTER	While holding down the CTRL and ALT keys, press the ENTER key.

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

## Customer Services

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### Register Your Copy of EndNote

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

- ◆ free technical support
- ◆ special upgrade offers
- ◆ notification of new EndNote versions that are compatible with the latest version of your word processor

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### EndNote Online Help

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

**The EndNote Manual:** The online Help file is made available as a PDF file (EndNote.PDF), and is installed in your EndNote folder.

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

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

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## Customer Service

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

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

### Sales Information

**Phone:** 760 722 1227 (country code is 01)(Toll Free)

**Phone:** 760 438 5526 (country code is 01)

**Fax:** 760 438 5573 (country code is 01)

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

### Customer 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/encontact.asp>

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## Technical Support

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

**For web/email or phone contact, please see:**

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

**For hours and holiday closures, please see:**

<http://scientific.thomson.com/support/techsupport/hours/>

Technical support tips are also available from the EndNote Web site and the EndNote Discussion Forum (see the sections that follow in this manual).

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## International Customer and Technical Support

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

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



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## The EndNote Web Site

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

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

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## The EndNote Discussion Forum

If you wish to join an ongoing forum of EndNote users like yourself, go to the EndNote Web site at <http://www.endnote.com>, click on *Support and Services*, and then scroll down and click on the link to go to the *EndNote Discussion 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](http://www.facebook.com/EndNote)
- ◆ [www.twitter.com/EndNoteNews](http://www.twitter.com/EndNoteNews)

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## 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.

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

## What's New in EndNote X4

**EndNote X4 adds these features:**

- ◆ Import and create new records from PDF files. Whether you are importing a single file or a folder of PDF files, EndNote uses metadata and DOI information to create a new reference and attach the source PDF. Basic bibliography

information will be added automatically for most journal articles, conference proceedings, conference papers, and reports.

- ◆ Search the contents of attached PDF files. You'll find a new option on the field list to search PDF files separately, or in combination with the reference data.
- ◆ Modify references easily in the new Quick Edit tab on the main library window. Use the tabs to preview formatted references, search your library and online resurfaced now edit references—all without opening additional windows.
- ◆ Create new groups by comparing, combining or suppressing existing groups. The new smart groups are updated dynamically as your library grows.
- ◆ Transfer up to 10,000 references between the desktop and EndNote Web to share online groups with other EndNote users. Shared groups are now included when you Cite While You Write from EndNote Web.
- ◆ Expand your library retrieval results by adding wildcards within search terms.
- ◆ Edit references when comparing duplicates—copy/paste and save changes in the side-by-side view.

**Cite While You Write new features include:**

- ◆ Add hyperlinks between in-text citations and the bibliography reference in Microsoft Word using any journal style.
- ◆ Use expanded functionality when editing citations—track usage and more.
- ◆ Meet the complete APA 6th style requirements including specific handling of references with eight or more authors, hyphenated first names and DOI data.
- ◆ Improved footnote handling for the Chicago Manual of Style and similar footnote-based bibliographic styles.
- ◆ Traveling Library enhancements recognize references when sharing Word documents for better collaboration.
- ◆ Get a quick citation report of references cited in a Microsoft Word document with a new auto-group in the EndNote library.

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**NOTE:** Thomson Reuters recommends that you view our What's New video at [www.endnote.com/training](http://www.endnote.com/training).

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# Chapter 1: Windows EndNote Installation

## Before You Install EndNote

Please read this section before you proceed with the installation.

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

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## 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 personal computer with a Pentium (or compatible) 450-MHz or faster processor
- ◆ A minimum of 256 MB of available RAM
- ◆ A hard drive with at least 180 MB of free space
- ◆ An Internet connection is required in order to use the EndNote Online Search feature for searching online databases, the Find Full Text feature, or EndNote Web. To use the *Open Link* command to access a Web site, you also need a Web browser installed.
- ◆ Unicode compliant
- ◆ Handhelp compatibility—16 MB RAM

- Windows Mobile® 5x device; Serial /USB Active Sync

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**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.

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**NOTE:** For Windows, check [www.endnote.com/enwin.asp](http://www.endnote.com/enwin.asp) for the latest compatibility requirements.

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## Word Processor Compatibility

As of June 2010, EndNote for Windows is compatible with:

- ◆ Microsoft Office Word 2003, 2007, or 2010 (32 bit version) 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

### 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 19.

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

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### **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 choose *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, choose *Run* from the Start menu, type "d:\setup" (use the drive letter appropriate to the drive containing the installation CD) and press ENTER.

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

**Welcome:** Thank you for selecting EndNote!

**Registration Information:** If you are installing the full version of EndNote, enter your EndNote product key. You must enter a valid product key to continue with installation of the full version of EndNote. The product key can be found in the EndNote X4 CD packaging, or on the order confirmation of your digital product.

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

**User Information:** Enter your name and organization.

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

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

**Windows Mobile Read Me Information:** Read late-breaking news about EndNote for the Windows Mobile OS.

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

**Select Installation Type:** *Typical* installs the most popular 100 output styles, most popular 100 filters, and most popular 100 connection files. Limiting the number of files installed speeds up performance. Advanced users can choose *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 X4 folder. The Demo version is installed in the C:\Program Files\EndNote X4 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.

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**NOTE:** If the installer detects a full version (not a demo version) of EndNote on your computer, it will give you the option to continue with the installation or quit. If you continue, be advised that you will need to reinstall your non-demo version of EndNote to use it after you run the EndNote X4 Demo version.

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**Select Components:** (Custom installations only) If you selected a Custom installation, see “Selecting Features” in this chapter.

**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 X4 is Successfully Installed” dialog, click *Register* to register your copy of EndNote, click *Finish* to close the installation program, or click *Run* to start EndNote.

To make sure the program installed correctly, see “Checking Your Installation” on page 21.

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## Installed Files

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

### Program Folder

C:\Program Files\EndNote X4, OR

C:\Program Files (x86)\EndNote X4 (64-bit Windows versions)

- ◆ EndNote X4.exe application file
- ◆ EndNote.chm help file  
You can double-click the file to view it. In the EndNote program, select *EndNote X4 Help* from the Help menu. Pressing the F1 key on your keyboard or clicking a *Help* or ? button in the program brings up a context-sensitive topic.
- ◆ Readme.txt text file contains late-breaking news
- ◆ GettingStartedGuide.pdf gives a tour of the program
- ◆ Examples shortcut folder  
This is a shortcut to an Examples folder that contains sample files to follow the guided tour found in Chapter 3 and the Getting Started Guide, and to experiment with while learning EndNote.
- ◆ Styles folder  
This folder contains bibliographic styles for formatting citations and a bibliography. A *Typical* installation includes

only the most popular 100 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 100 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 100 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.
- ◆ **Pocket PC folder**  
This folder contains Read Me files and support files that allow you to keep an EndNote library on a Windows Mobile device.
- ◆ **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\...

**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 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.

## 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

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## Custom Installations/ Adding Content Files

search, the RefTypeTable.xml file that stores your reference type preferences, saved search strategies, and various other settings.

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 do a new custom installation:

1. Follow the instructions for “EndNote Installation” in this chapter.
2. On the dialog titled “Select Installation Type,” select *Custom*.
3. When you get to the dialog titled “Select Features,” read the section below, “Selecting Features” on page 19 to determine what you would like to select/deselect for installation.

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

---

### To install components after EndNote X4 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 as you would for a new installation.
  - ◆ From the Windows Start menu, select *Control Panel*, or choose *Settings* and then *Control Panel*. Then, choose *Add or Remove Programs*. In the list, click on EndNote X4 and then *Change*.
3. On the “Application Maintenance” dialog, select the *Modify* option and click *Next*.
4. When you get to the “Select Features” dialog, read the section below, “Selecting Features” on page 19 to determine what you would like to select/deselect for installation.

## Selecting Features

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

**The components you can select for installation include:**

### **EndNote Application**

- ◆ EndNote Program
- ◆ Sample Files
- ◆ EndNote Help

### **Word Templates/Add-ins:**

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

**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 spelling checker.

**EndNote for Windows Mobile:** These are files required for using EndNote for the Windows Mobile operating system.

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 X4. See “Uninstalling EndNote” on page 23.

During installation, you will need to enter both your new EndNote X4 product key, which is found in the EndNote X4 CD packaging

or on the order confirmation for your digital product, and your old EndNote serial number. (The Demo version of EndNote does not require these.)

Install the upgrade just as you would a new installation. See “EndNote Installation” on page 13. By default, EndNote X4 is installed into the C:\Program Files\EndNote X4 folder.

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## Backing Up or Replacing Files

If Setup detects an earlier copy of the EndNote program in the installation folder, it alerts you and gives you two options. If you continue with the installation to install EndNote X4 into your existing EndNote folder, Setup removes the older EndNote application and word processor support files. You need to select what it should do with the styles, filters, and connection files from your older copy of EndNote. No matter which option you choose, your libraries will not be deleted; nor will any non-EndNote files in the EndNote folder.

- ◆ **Backup older files:** EndNote X4 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 X4, you should choose this option. Doing so has EndNote create a “Backup” folder in the EndNote folder and all of the styles, filters, and connection files from your older installation are copied into that folder. After installing EndNote, you should move any of these files that you want to use into the Styles, Filters, or Connections folders installed with EndNote X4.
- ◆ **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 X4. Do *not* choose this option if you have custom styles, filters, or connection files that you want to save. If they have the same names as any of the files to be installed, the installer will overwrite them with the new files.

---

## Opening and Converting Old EndNote Libraries

EndNote X4 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 *Open Library*.
3. On the file dialog, locate and highlight the old library, and click *Open*.

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

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

---

**NOTE:** Once you have opened and used a library with EndNote X4, you should use the library only with version X or later.

---

---

## Using Old Style, Filter, and Connection Files

EndNote X4 can use custom styles, filters, and connection files that were created with EndNote versions 4.0.1-X4. Once you edit and save one of these files with EndNote X4, it is converted to the latest format, which can be used with EndNote versions 8 to EndNote X4.

All of the styles, filters, and connection files supplied with EndNote X4 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.

## Checking Your Installation

---

### To Begin Using EndNote

To run EndNote, click the *Start* button, choose *All Programs*, select *EndNote*, and then choose *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 Desktop” in EndNote help.

Next, a dialog may ask you to open a library file. You can create or open an EndNote library, or choose *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, choose *About EndNote* from the Help menu. Click the splash screen to clear it.

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

---

### Checking 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 and you should see EndNote commands on an EndNote X4 submenu.

- ◆ In Word 2007 and 2010, you should see an EndNote tab.
- ◆ In OpenOffice.org Writer, you should see EndNote commands on an EndNote X4 menu.

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

**If Cite While You Write commands do not appear in Microsoft Word or OpenOffice.org Writer, repair the EndNote installation:**

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 choose *Exit Quickstarter*.

3. From the Windows Start menu, select *Control Panel*, or choose *Settings* and then *Control Panel*.
4. Choose *Add or Remove Programs*.
5. Highlight *EndNote X4* and click *Change*.
6. Select *Repair* and 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 X4 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, “Uninstalling the EndNote Program.”

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, choose *All Programs>EndNote>Configure EndNote*.
  - ◆ Go to the EndNote program folder and double-click “Configure EndNote.exe.”
3. Select *Remove all EndNote components for me* and click *Next*.
4. Continue through the uninstall process as instructed.

This uninstalls 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*, or choose *Settings* and then *Control Panel*.
3. Select *Add or Remove Programs*.
4. In the list of currently installed programs, select *EndNote X4*.
5. Click the *Remove* button.

### 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 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 with Windows Explorer. Once you are sure you do not want to save any of the files contained in the following folders, you can delete them:

#### Windows XP

C:\Program Files\EndNote X4  
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 X4  
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 X4.

---



# Chapter 2: Introduction to an EndNote Library

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

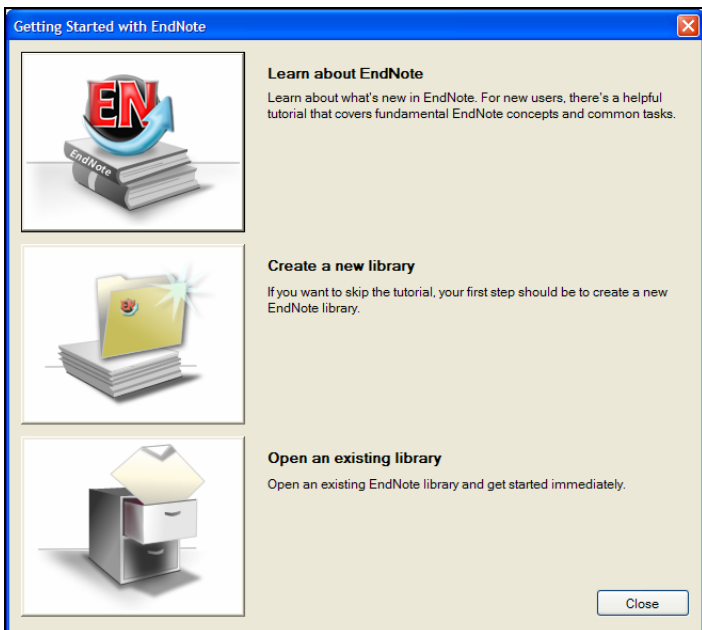
- ◆ Start EndNote and open a library.
- ◆ Sort the reference list.
- ◆ Select, open, and close a reference in the EndNote library.
- ◆ Save references to custom groups.
- ◆ Quit from the EndNote program.

---

## Start EndNote

To start the EndNote program and open the sample library:

1. From the Start menu, choose *Programs > EndNote > EndNote Program*. If this is the first time you have used the program, a dialog appears prompting you to open a reference library.



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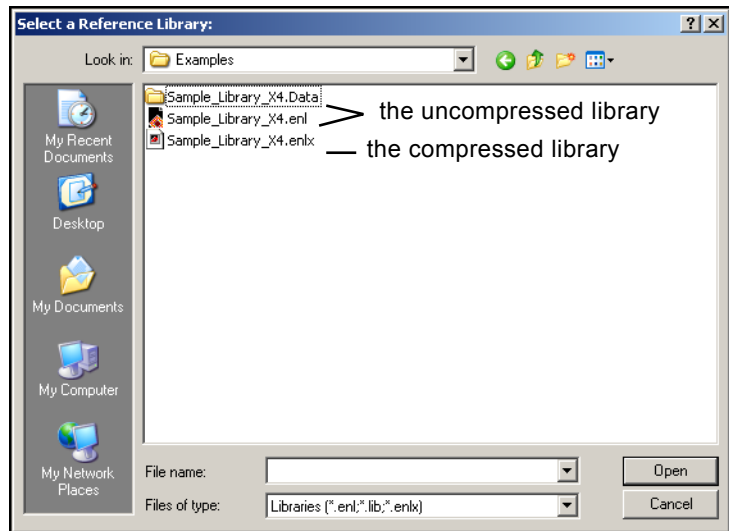
**NOTE:** If you have set a favorite library to open automatically, that library will open instead of the dialog shown above. If this happens, close the library, go to the File menu and choose *Open > Open Library*, and continue with step 3.

---

2. Click the *File Cabinet* icon next to “Open an existing EndNote library.”
3. In the file dialog, locate and open a reference library. Use the Look in: menu to find the EndNote X4/Examples folder.
  - ◆ Choose the C: drive and *Open*.
  - ◆ Choose *Program Files* and *Open*.
  - ◆ Choose the EndNote X4 folder and *Open*.
  - ◆ Choose 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\_X4.enlx. Open the Sample\_Library\_X4.enlx file and EndNote extracts the uncompressed library files (Sample\_Library\_X4.enl and Sample\_Library\_X4.Data) and opens them for viewing.

If you have previously opened the compressed sample library, select Sample\_Library\_X4.enl, and then click *Open*.



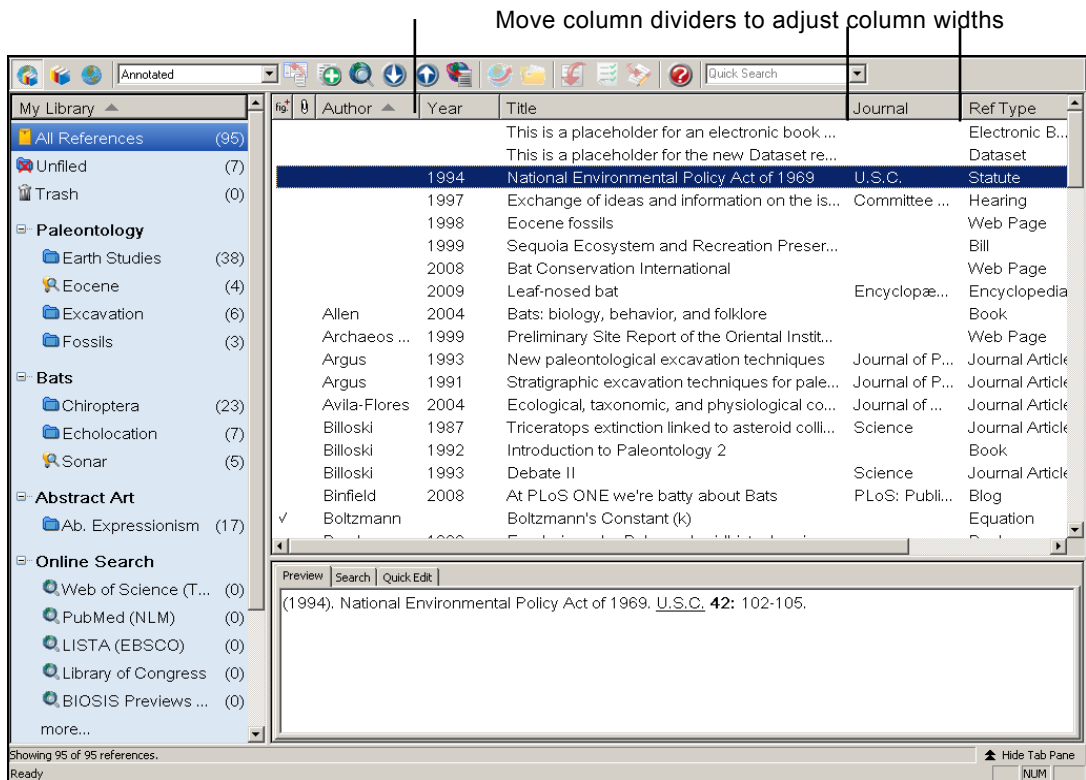
---

**NOTE:** You can open a library from within EndNote. From the File menu, choose *Open > Open Library*.

---

# The Library Window

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



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:

- ◆ First author's last name
- ◆ Year
- ◆ Title
- ◆ Journal name or secondary title
- ◆ Reference type
- ◆ URL

---

**NOTE:** You can change the order of the fields that display in the reference list by selecting from the Edit menu, *Preferences > Display Fields*.

---

**Groups pane:** Displays various group sets that contain 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 Quick Edit tab allowing you to quickly edit a reference.

The information displayed in the reference list, as well as the font used for the display, can be changed using EndNote Preferences.

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 tab 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 (or just styles) represent the rules for creating bibliographies for a variety of journals and other publications. The styles determine how your references look when you print, export, preview, or create bibliographies.

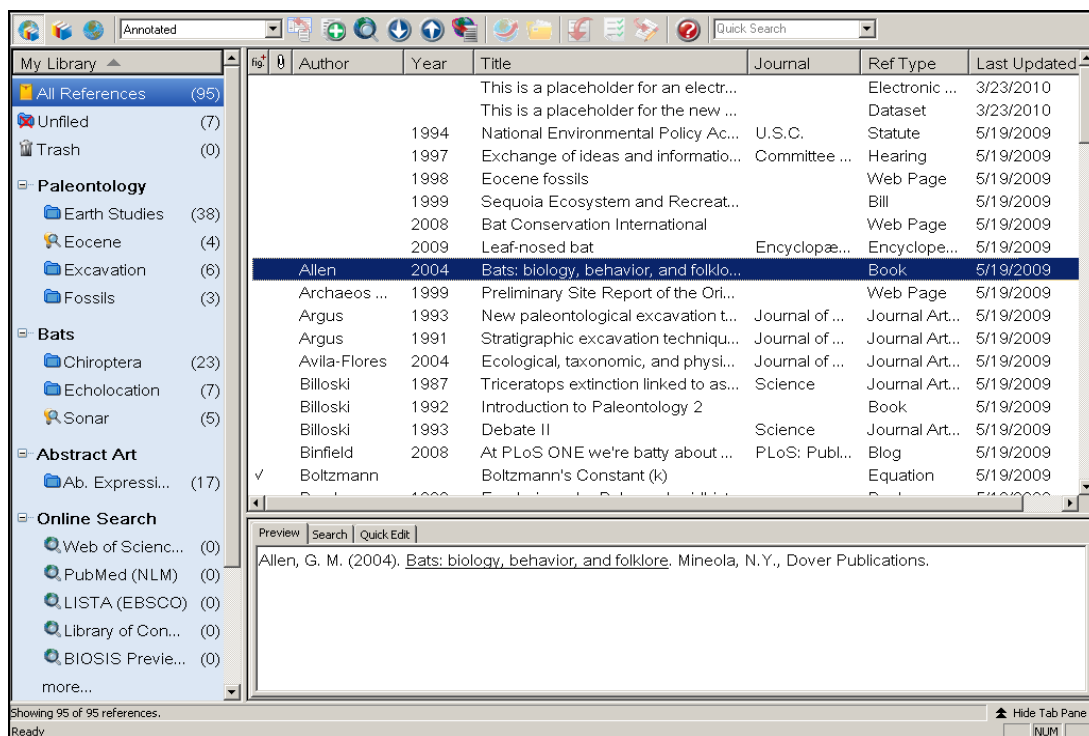
- To select a different output style to apply to the reference, go to the toolbar and select *Numbered* from the drop-down list of output styles.

**NOTE:** The style list displays your “favorite” output styles, but you can choose *Select Another Style* to pick from other installed files. A Typical installation installs the 100 most popular output styles, but more than 4,500 output styles are available with EndNote.



Only one reference is displayed on the Preview tab at a time. If multiple references are selected, only the active reference (surrounded by a dotted line) is displayed.

The format of the reference on the Preview tab can be changed at any time by choosing a different output style.



When the Tab pane is showing, a *Hide Tab Pane* button is available at the bottom of the window. You can click *Hide Tab*

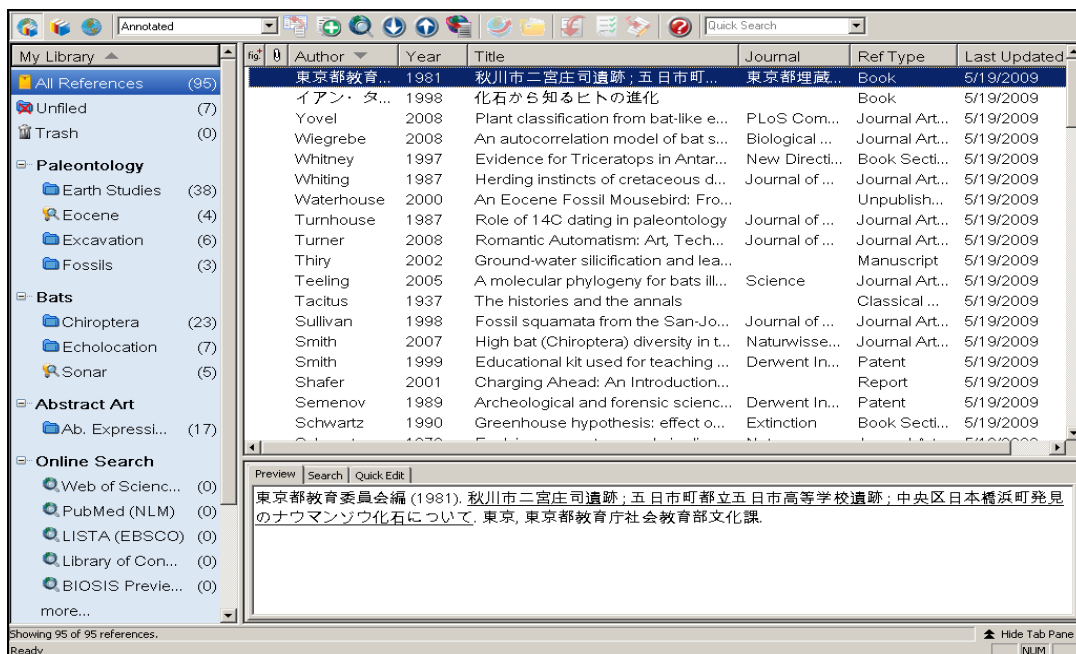
*Pane* to hide the Preview tab. The name of the button will toggle to *Show Tab Pane*.

## Sort the References

References can easily be 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 3: "Setting EndNote Preferences". For some display elements, you may need to install special Windows Language Packs. 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.



- Click the *Author* column heading to return the sort order of the library to an alphabetical list sorted by the author names.

## Select and Open a Reference

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

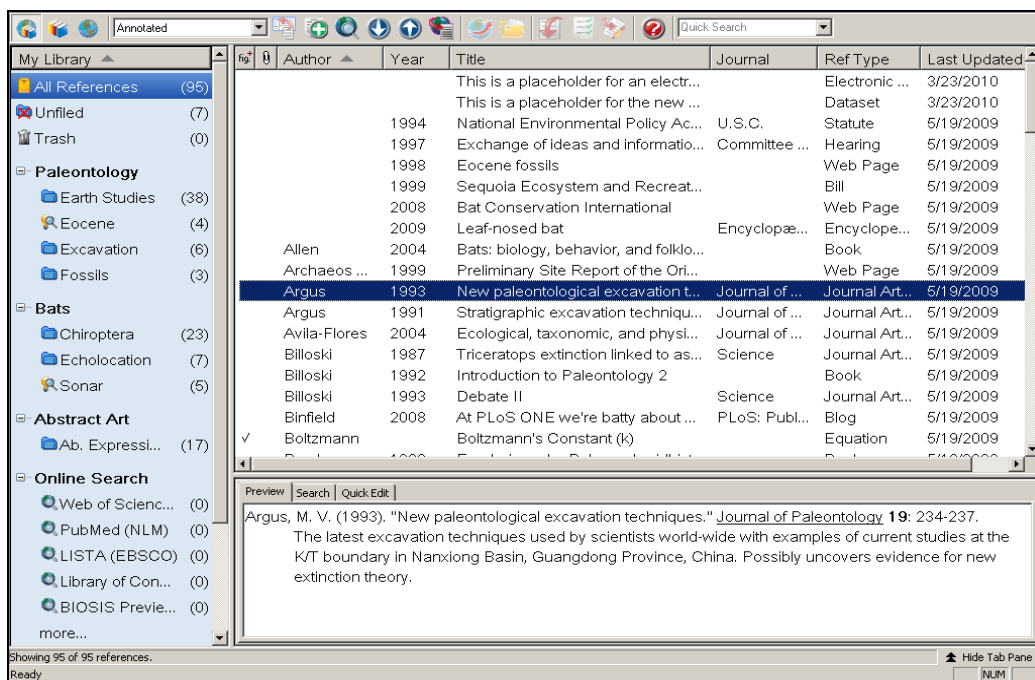
There are different ways to select a reference, such as clicking on the reference using the mouse, using the arrow keys, or typing the first few letters found in the field by which the library has been sorted.

To see how this works, click 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:

- Select the first Argus reference in the list.

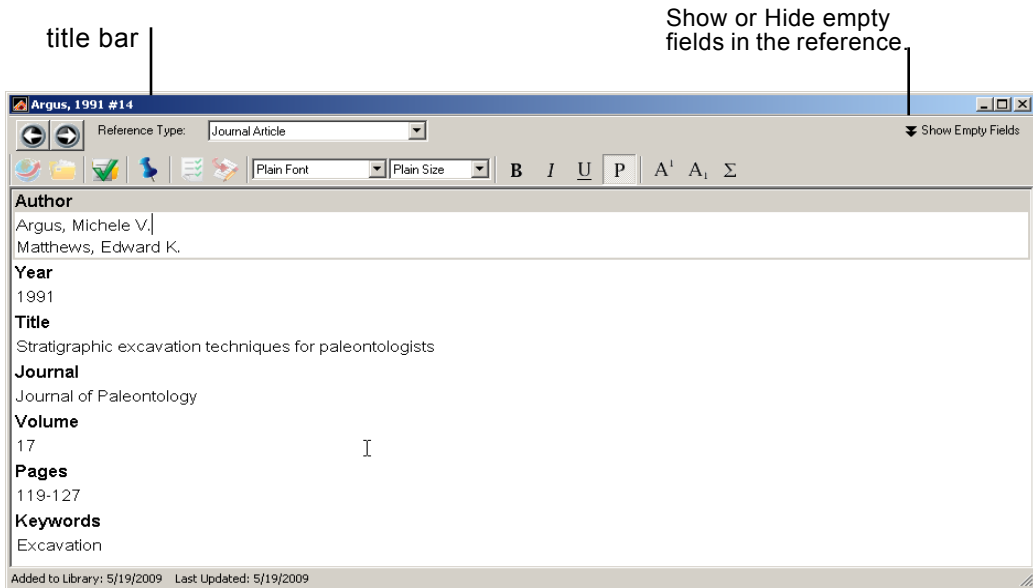
Now that the reference is selected, there is a number of things you can do with it, such as view its contents, copy, cut, delete, or edit it. For now, just open the reference to view the



contents.

- Open the selected Argus reference by pressing the ENTER key 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.



Click and drag to resize the window.

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

---

**NOTE:** The citation information is displayed at the top of the Reference window in the title bar, “Argus, 1993 #15.” This information - the first author’s last name, year, and record number - is used by EndNote to match citations in a paper to references in a library.

---

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

- ◆ Press SHIFT+TAB to move backward through the fields.
- ◆ Click the *Show Empty Fields/Hide Empty Fields* button 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:

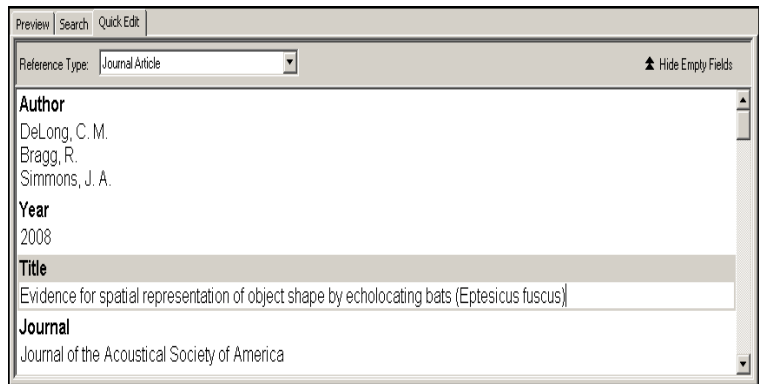
- ◆ Click the X close button in the upper corner of the Reference window (not the outer close button for the library).

- ◆ From the File menu, choose *Close Reference*.
- ◆ From the keyboard, press CTRL+W. Note that many of the menu commands have a keyboard equivalent next to them.

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

## Quick Edit Pane

The Quick Edit pane in the Preview area of the EndNote window 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.

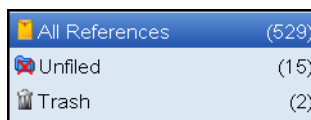


You can quickly edit your references by clicking on the Quick Edit tab. Most functionality is the same as working in the Reference window. Enter text in a field by clicking on the field. All commands are available via the menus including contextual menus.

## Save References to a Custom Group

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

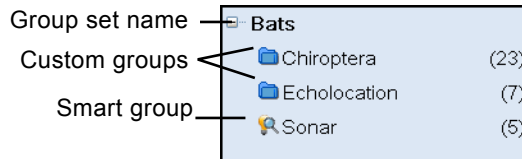
- ◆ **All References** displays all of the references in the library.
- ◆ **Unfiled** contains references that are not part of a custom group.
- ◆ **Trash** contains references that have been deleted from the library but not yet permanently eliminated.



Below the permanent groups, you can create group sets to organize up to 500 custom and smart 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. You can even create a combination group that 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*. You could right-click under the Paleontology group in the Groups pane to display a context-sensitive menu, and then select *Create Group*.

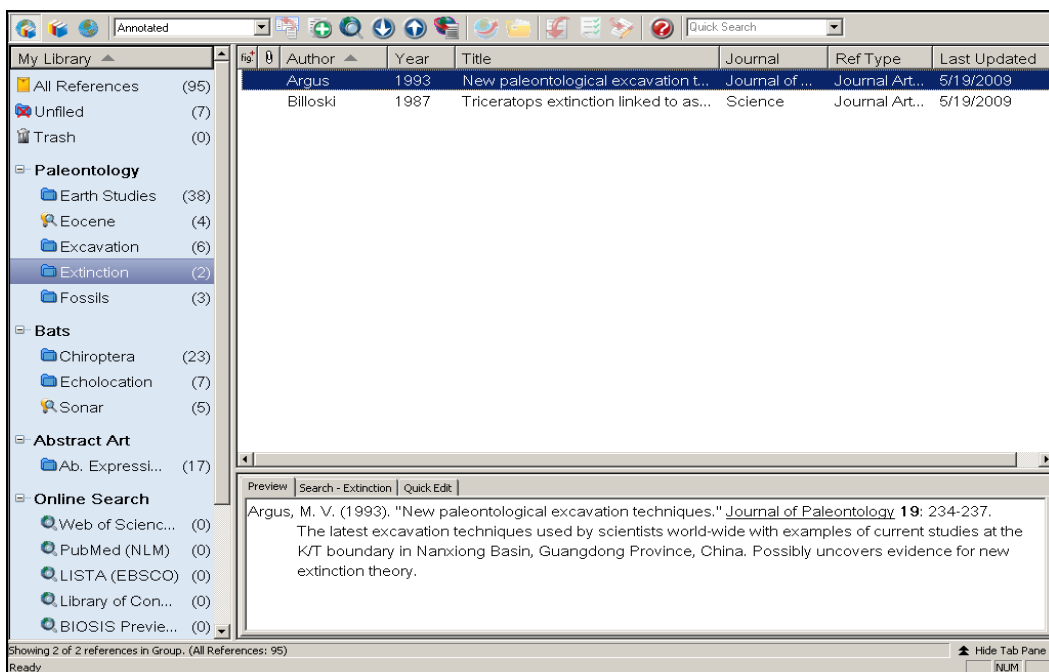
In the Groups pane of the Library window, a group titled *New Group* is now highlighted for editing.

3. Type "Extinction" as the group name, and then press ENTER or click in the reference list area to save the change.

There are no references in the new Extinction group.

4. Click 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 CTRL key as you click on them.
6. Drag the selected (highlighted) references to the new Extinction group and drop them on the title of the group. You could go to the Groups menu and choose *Add References To > Extinction*.

- Click 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:

- Click the group title *Extinction* to display the group.
- Drag it to the Bats group set, and drop the group anywhere in the Bats set.

### To delete a custom group:

- Right-click the *Extinction* group name to display a context-sensitive menu, and then choose *Delete Group*.

Or, you could click the group name, and then select *Delete Group* from the Groups menu.

- 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 context-sensitive menu.

---

## **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.
- ◆ “Sorting the Library” to learn more about sorting.
- ◆ “Using Groups” to learn more about creating and managing groups.

# Chapter 3: 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_X4.enl` as shown in “Start EndNote” on page 27.

---

## Access EndNote Preferences

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

From the Edit menu, choose *Preferences*.

---

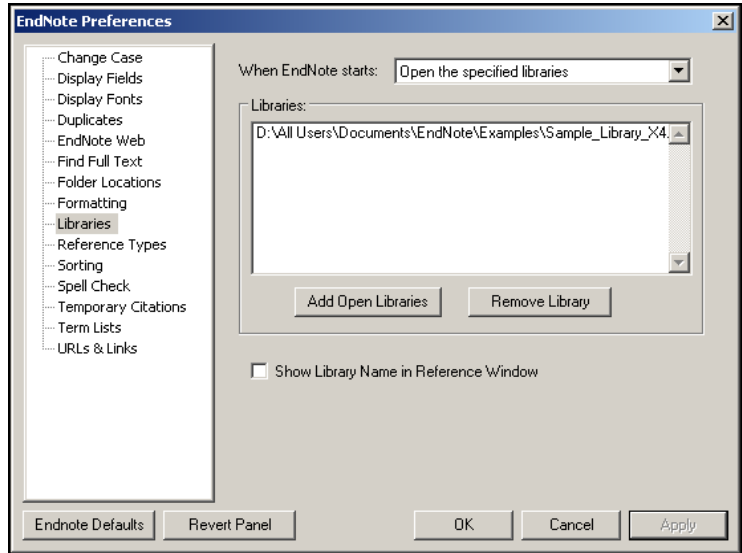
## Set a Default Library

You can assign a library to open automatically every time you start EndNote. You will find it useful to set the sample library (`Sample_Library_X4.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 Edit menu and choose *Preferences*.
2. In the list on the left, click *Libraries*.
3. Choose *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\_X4.enl) listed at the top of the box.



5. Click *Apply* to save this change.

While you could click *OK* to leave the Preferences dialog, we are going to change another preference first.

---

## Change the Library Display Font

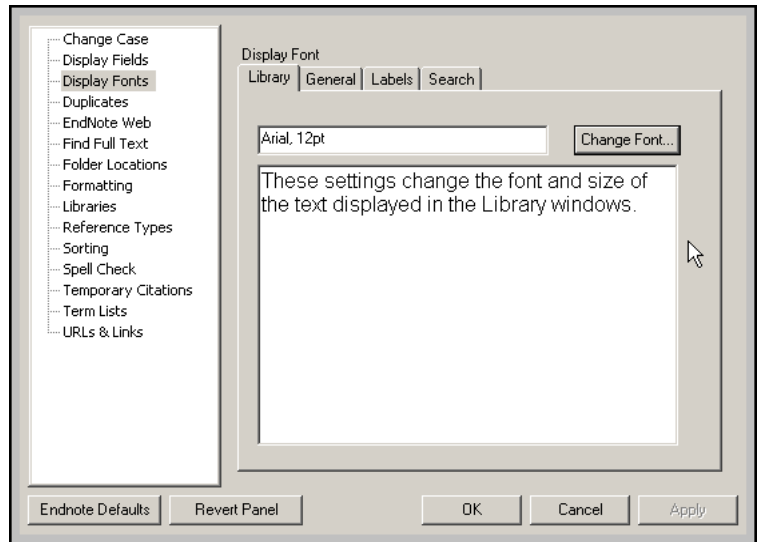
Pick a different font to display text in the Library window and the Reference window.

### To change the display fonts:

1. Go to the Edit menu, and then choose *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 Font* button.
4. In the Font list, choose *Arial Unicode MS* (or another Unicode font that supports Japanese characters). Click *OK* 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 sample library.

5. On the General tab, click the *Change Font* button.
6. In the Font list, select *Arial Unicode MS* (or another Unicode font that supports Japanese characters). Click *OK* to save the change.
7. Click *OK* 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 4: 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\_X4.enl as shown in “Start EndNote” on page 27.

---

## 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 49.
- ◆ Import text files of references that have been downloaded from online bibliographic databases as demonstrated in “Importing Reference Data into EndNote” on page 61.

**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, choose *New Reference* (CTRL+N) to display an empty Reference window.

The screenshot shows the EndNote Reference window. At the top, there's a 'Reference Type:' dropdown menu set to 'Journal Article'. Below this is a toolbar with icons for undo, redo, save, print, and a list of reference types. The main area is a form with fields for Author, Year, Title, Journal, Volume, and Issue. The status bar at the bottom shows 'Ready' and a 'NUM' button.

New references appear as journal articles (unless you change the default setting) but can be changed to any other

type of reference using the Reference Type list at the top of the window.

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

Reference Type  
set to "Book"

The screenshot shows the EndNote reference entry window. At the top, the 'Reference Type' dropdown menu is set to 'Book'. Below this is a toolbar with icons for file operations and a formatting toolbar with options like Bold, Italic, Underline, Paragraph, and mathematical symbols. The main area contains a list of fields for bibliographic information: Author, Year, Title, Series Editor, Series Title, and City. The 'Author' field is currently selected and contains a cursor. The status bar at the bottom indicates 'Ready' and has a 'NUM' button.

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

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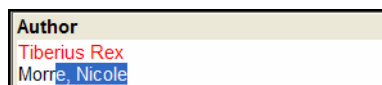
The name you are entering, Tiberius Rex, is a new author in this library, so keep typing until you complete the name, and then press the ENTER key.

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



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, 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

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 of text into each of these 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:

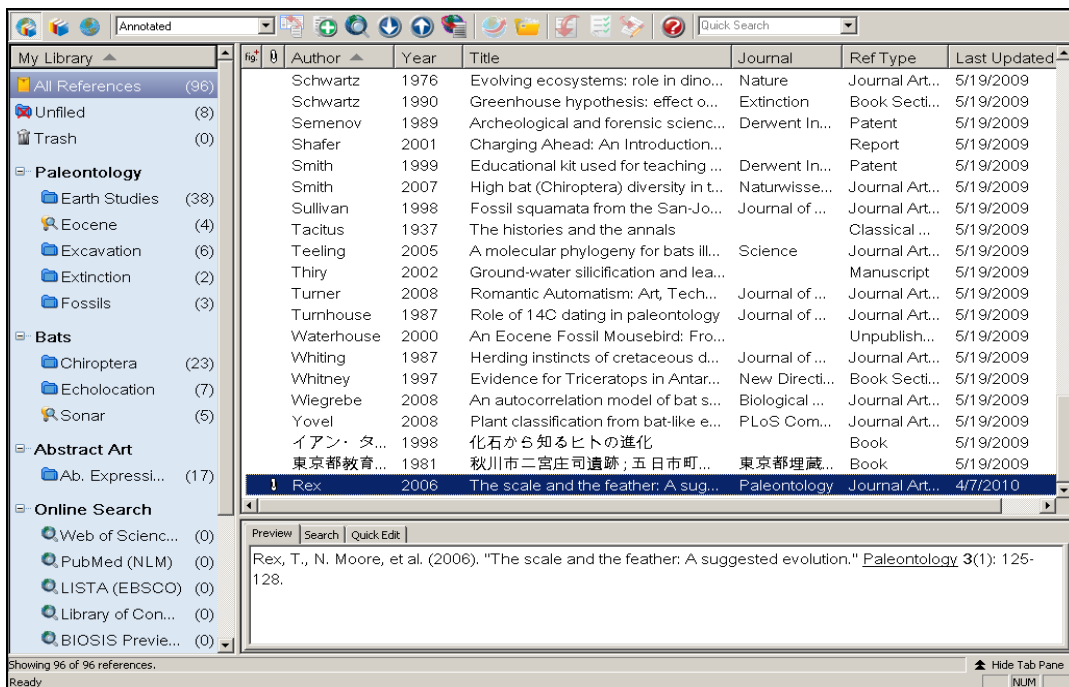
- a. Navigate to the folder Program Files\EndNote X4.
- b. Notice the check box titled “Copy this file to the default file attachment folder and create a relative link.” Make sure this box is selected so that EndNote will make a copy of the file to store with the library. That way, the attached file is always available to you, even when you move the library.

- c. Highlight the file titled EndNote.pdf. This is the full EndNote help system located in the EndNote program folder.
- d. Click *Open* to insert the file into the File Attachments field. A file icon will appear in the field.



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

7. Close the Reference window by choosing *Close Reference* (CTRL+W) from the File menu.
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.

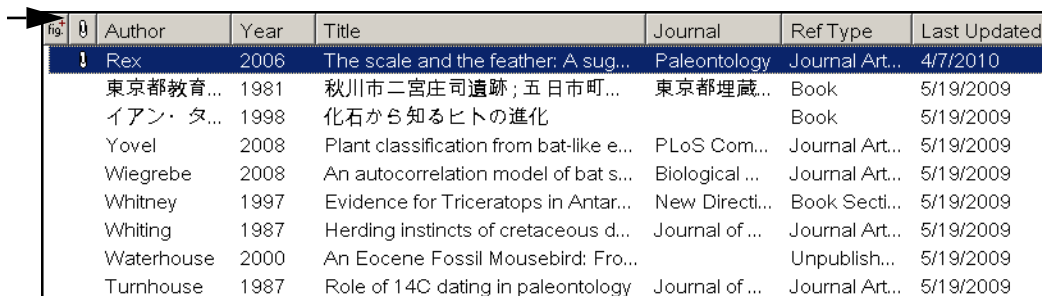
---



## 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.



	Author	Year	Title	Journal	Ref Type	Last Updated
	Rex	2006	The scale and the feather: A sug...	Paleontology	Journal Art...	4/7/2010
	東京都教育...	1981	秋川市二宮庄司遺跡; 五日市町...	東京都埋蔵...	Book	5/19/2009
	イアン・タ...	1998	化石から知るヒトの進化		Book	5/19/2009
	Yovel	2008	Plant classification from bat-like e...	PLoS Com...	Journal Art...	5/19/2009
	Wiegrebe	2008	An autocorrelation model of bat s...	Biological ...	Journal Art...	5/19/2009
	Whitney	1997	Evidence for Triceratops in Antar...	New Directi...	Book Secti...	5/19/2009
	Whiting	1987	Herdling instincts of cretaceous d...	Journal of ...	Journal Art...	5/19/2009
	Waterhouse	2000	An Eocene Fossil Mousebird: Fro...		Unpublish...	5/19/2009
	Turnhouse	1987	Role of 14C dating in paleontology	Journal of ...	Journal Art...	5/19/2009

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

---

## About the PubMed Database

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

## For Users With “Dial-up” Internet Connections

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

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

**Disconnecting:** EndNote disconnects from an online database as soon as a search is completed, but 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\_X4.enl as shown in “Start EndNote” on page 27.

---

## 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 Groups 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.

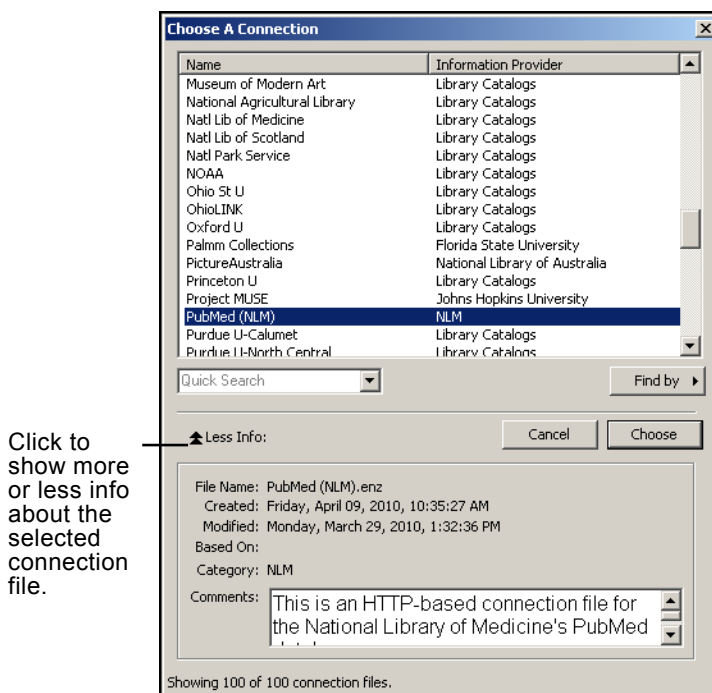
### To connect to the PubMed Database:

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 *more*.

---

**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 the 100 most popular connection files, but more than 4,100 connection files are available with EndNote.

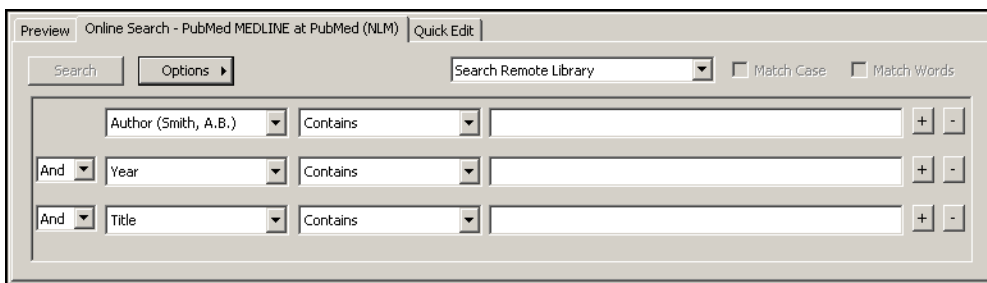
---

Use the Find by list to quickly view various categories of databases to help you locate the one that you need. Or, type text into the Quick Search text box and press ENTER.

2. Select the *PubMed* connection file, and then click *Choose*. You can begin entering your search terms in the fields.

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

When the connection has been established, EndNote displays a Search 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 these fields appears italicized in the Search tab lists, that indicates it is not a valid option for this particular online database.

---

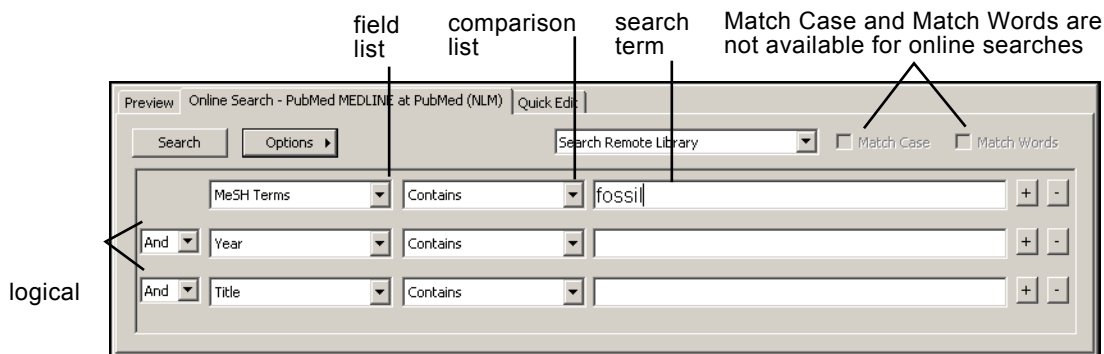
## Search the Database

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

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

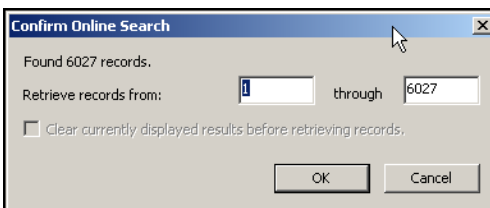
## To enter the search term(s) and perform the search:

1. 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*.



2. Click *Search*.

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



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

---

**NOTE:** 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.

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

The screenshot shows the 'Online Search - PubMed MEDLINE at PubMed (NLM)' window. It features a 'Search' button and an 'Options' dropdown. A 'Search Remote Library' dropdown is set to 'PubMed'. There are three search lines, each with a field type dropdown, an operator dropdown, and a text input field. The first line has 'MeSH Terms', 'Contains', and 'fossil'. The second line has 'And', 'All Fields', 'Contains', and 'trilobite'. The third line has 'And', 'Title', 'Contains', and an empty field. There are also checkboxes for 'Match Case' and 'Match Words'.

6. Click *Search*.  
This time fewer references are found.

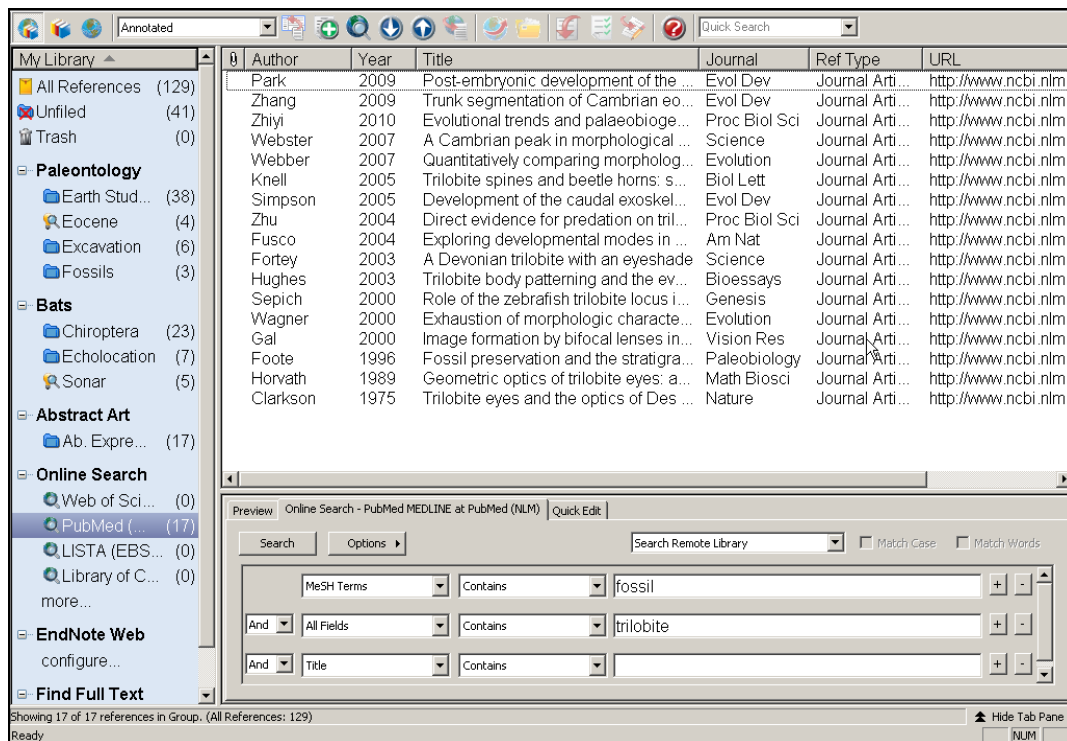
The 'Confirm Online Search' dialog box shows 'Found 17 records.' and 'Retrieve records from: 1 through 17'. There is a checkbox labeled 'Clear currently displayed results before retrieving records.' which is checked. At the bottom are 'OK' and 'Cancel' buttons.

7. 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 group for the PubMed database connection.

---

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

---



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

---

**NOTE:** You can click the plus or minus icon next to a group set heading in order to display or hide the list of groups under that heading.

---

## Review the References

At this point you can peruse 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.

**To quickly look at the new references:**

1. Click on a reference in the reference list.

2. In the Tab pane, click the Preview tab to display a reference preview.
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, you can 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 CTRL key and clicking on the individual references. (Use SHIFT+click to select a range of references.)

Q	Author	Year	Title	Journal	Ref Type	URL	Last Updated
	Park	2009	Post-embryonic development of the ...	Evol Dev	Journal Art...	htt...	4/20/2010
	Zhang	2009	Trunk segmentation of Cambrian eo...	Evol Dev	Journal Art...	htt...	4/20/2010
	Zhiyi	2010	Evolutional trends and palaeobioge...	Proc Biol ...	Journal Art...	htt...	4/20/2010
	Webster	2007	A Cambrian peak in morphological ...	Science	Journal Art...	htt...	4/20/2010
	Webber	2007	Quantitatively comparing morpholog...	Evolution	Journal Art...	htt...	4/20/2010
	Knell	2005	Trilobite spines and beetle horns: s...	Biol Lett	Journal Art...	htt...	4/20/2010
	Simpson	2005	Development of the caudal exoskel...	Evol Dev	Journal Art...	htt...	4/20/2010
	Zhu	2004	Direct evidence for predation on tril...	Proc Biol ...	Journal Art...	htt...	4/20/2010
	Fusco	2004	Exploring developmental modes in ...	Am Nat	Journal Art...	htt...	4/20/2010
	Fortey	2003	A Devonian trilobite with an eyeshade	Science	Journal Art...	htt...	4/20/2010
	Hughes	2003	Trilobite body patterning and the ev...	Bioessays	Journal Art...	htt...	4/20/2010
	Sepich	2000	Role of the zebrafish trilobite locus i...	Genesis	Journal Art...	htt...	4/20/2010
	Wagner	2000	Exhaustion of morphologic characte...	Evolution	Journal Art...	htt...	4/20/2010
	Gal	2000	Image formation by bifocal lenses in...	Vision Res	Journal Art...	htt...	4/20/2010
	Foote	1996	Fossil preservation and the stratigra...	Paleobiolo...	Journal Art...	htt...	4/20/2010
	Horvath	1989	Geometric optics of trilobite eyes: a...	Math Biosci	Journal Art...	htt...	4/20/2010
	Clarkson	1975	Trilobite eyes and the optics of Des ...	Nature	Journal Art...	htt...	4/20/2010



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 References menu and choose *Empty Trash*. Until you choose *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, and attach the PDF file to the reference.

### To find the full text for a reference:

1. Click in the list of All References and type “Kelly” to jump to the reference by the author Kelly.
2. Highlight the reference by Kelly as well as the next reference, by the author Knell.
3. From the References menu, choose *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.

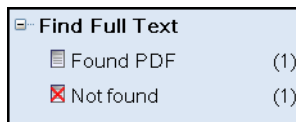
#### 4. Click *OK* to begin the Find Full Text search.

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 Kelly reference has a paper clip icon next to it, indicating an attached file.

Jones	1976	The Theory of Foraging	Book	5/19/2009
! Kelly	2006	Geographic clustering of econ...	Conference... http...	5/11/2010
Knell	2005	Trilobite spines and beetle hor...	Biol Lett Journal Arti... http...	5/11/2010

You could open the Kelly reference, double-click the PDF icon in the File Attachments field, and read the entire article.

The Knell reference and the Kelly reference each had a URL added to the URL field. The URL will 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 6: 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 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_X4.enl` as shown in "Start EndNote" on page 27.

---

### 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.

---

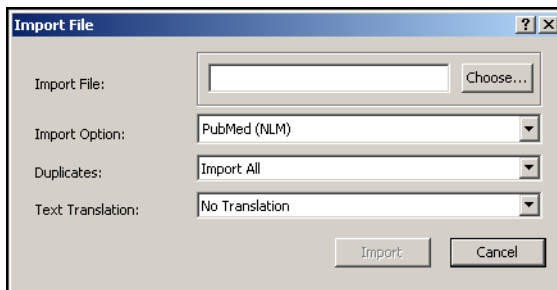
## Choose the Correct Import Filter and Import into EndNote

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. View the Library window in EndNote.

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



3. Click the *Choose* button to display a file dialog.
4. Browse to the EndNote X4\Examples folder, and then highlight and *Open* the pubmed\_result.txt file.
5. 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.

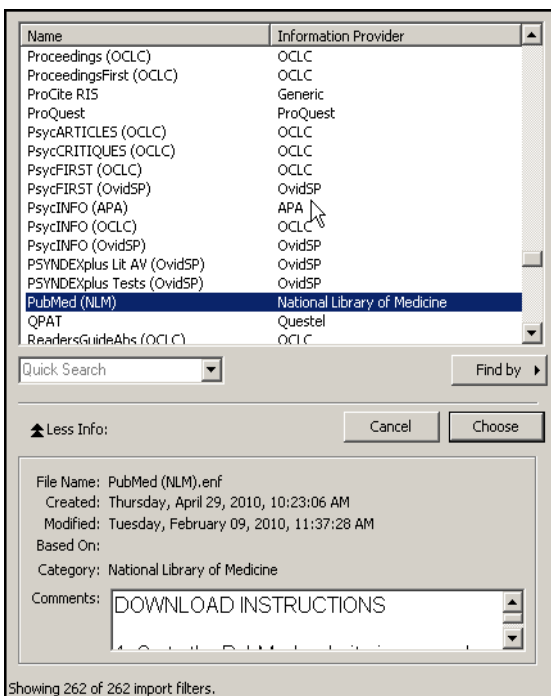
---

**NOTE:** A Typical installation installs the 100 most popular filters, but there are hundreds available with EndNote.

---



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



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.

7. With the *PubMed (NLM)* filter highlighted, click *Choose*.
8. Leave the other two options at their default settings:

**Duplicates:** Import All

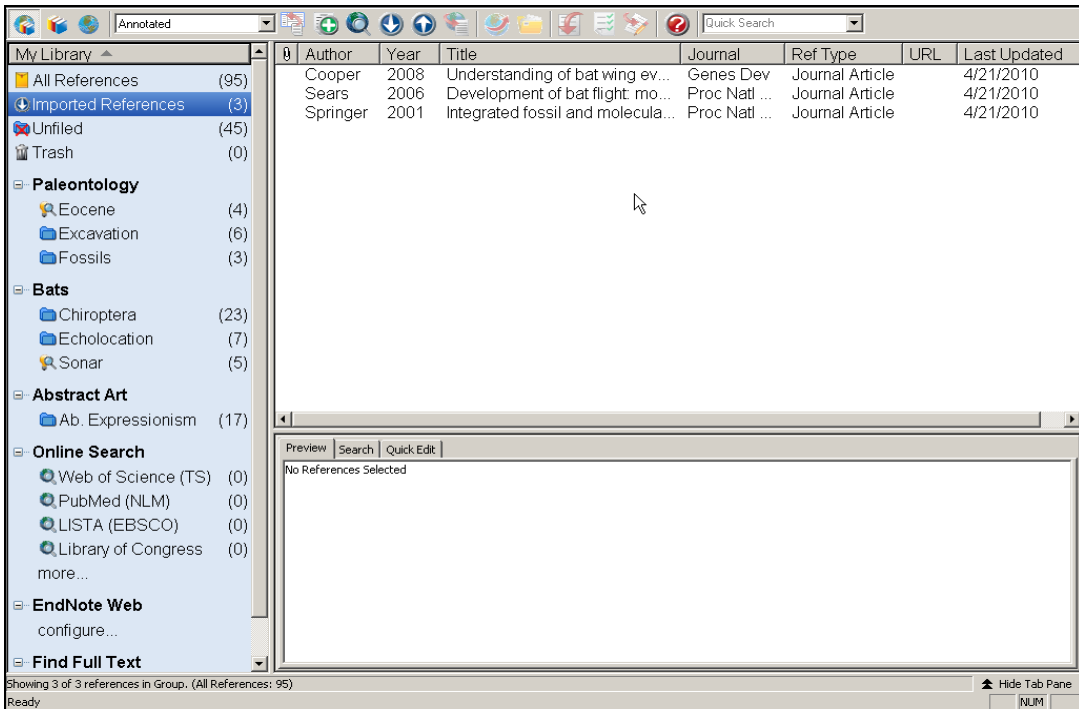
By default, a reference is considered a duplicate if the Author, Year, Title, and Reference Type match a reference already in the library. You can change the duplicates criteria under EndNote Preferences. We will import all references regardless of duplicates.

**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.

9. 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.

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

---

## Summary of Output Formats and Matching Import Options

A subset of supported information providers are listed here with their recommended output formats. Check this list for guidance in order to download in the appropriate tagged format and select the appropriate import filter. This information was accurate at the time of publication, but you may need to contact your information provider if changes occur. You can also check our Web site at <http://www.endnote.com> for updated information and import filters.

---

**NOTE:** Some of the services listed in this table, such as EBSCO and WilsonWeb, have an alternate, easier way of transferring references into an EndNote library. See “Direct Export from Web Pages” on page 73.

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### Copyright Issues and Fair Use of Downloaded Data

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

## Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
<b>AARP AgeLine</b> ( <a href="http://research.aarp.org/ageline/home.html">http://research.aarp.org/ageline/home.html</a> )	There is no method for downloading data from this database. Instead, save the results screen as a plain text file with your Web browser's Save command. The resulting text file contains tags which are preceded by 18 spaces.	Ageline (AARP) filter
<b>ACM Digital Library</b> (Association for Computing Machinery)	<p>Users with subscription access to this Web site can save multiple records to a BINDER. Once saved, you can export the records in an EndNote format.</p> <p>Non-subscribers can download one record at a time:</p> <ol style="list-style-type: none"> <li>1. Create a search.</li> <li>2. Click on an article.</li> <li>3. Scroll half-way down the page and select <i>EndNote</i> under <i>Display Formats</i>.</li> </ol> <p>Limitations:</p> <p>Since only plain text files can be imported into EndNote, you cannot import images, graphics, etc.</p> <p>Before importing, you may need to edit the file to insert a comma after corporate author names. Otherwise, EndNote will not be able to distinguish corporate authors from personal authors.</p>	EndNote Import
<b>CAS SciFinder</b>	Save references in the "Tagged Format" (*.txt).	SciFinder (CAS) filter
<b>CSA</b> (formerly Cambridge Scientific Abstracts)	<p>From the CSA search results screen, click <i>Save/Print/Email</i>. On the "Save/Print/Email" screen, select:</p> <p>Record Format: Full Record Save File Format: PC</p> <p>Click <i>Save</i>. Your Web browser asks where to save the file. If your Web browser lets you save in different file formats, make sure you save as a "Text Only" (*.txt) file.</p>	Various filters for CSA databases are provided in the EndNote Filters folder.

## Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
<b>Dialog</b>	<p>Set your communication software's option to capture text. Use Dialog's Format 5 with "tag" appended to the TYPE command -- type "s1/5/1-20 tag".</p> <p>You must download data in Format 5. If Format 5 is not available, try the "full" format, which is sometimes the same as Format 5. For questions concerning Dialog's many formats, please contact Dialog's tech support.</p>	Various Dialog filters are provided in the EndNote Filters folder.
<b>DIMDI</b>	Use the DLOAD command with report D1 (e.g. DLOAD REPORT=D1).	Various DIMDI filters are provided in the EndNote Filters folder.
<b>EBSCOhost</b>	<p>After adding selected references to your folder, click "View Folder" or "Folder has items" to see its contents.</p> <p>On the Folder Content page, click <i>Export</i>. On the Export Manager page, select "Generic bibliographic management software" to save a file to disk. Click <i>Save</i>.</p>	Various EBSCO filters are provided in the EndNote Filters folder.
<b>EDINA</b>	<p>Use the "Name" format, where data is tagged with words such as "Author" rather than "AU."</p> <p>Because there are so many different formats used for source data, you may need to manually edit source data after importing.</p> <p>EndNote cannot parse author names that are not clearly delimited, such as "S Hughes B Reynolds S A Bell &amp; C Gardner." You will need to manually edit author names.</p>	Various EDINA filters are available in the EndNote Filters folder.

## Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
<b>Emerald</b>	<p>Display the marked list, click “display for download (ASCII),” and then save as a plain text file.</p> <p>The filter provided works for these Emerald databases:</p> <p>Emerald Management Reviews at <a href="http://www.emeraldinsight.com/revs/">http://www.emeraldinsight.com/revs/</a></p> <p>Computer Abstracts International Database at <a href="http://www.emeraldinsight.com/caid">http://www.emeraldinsight.com/caid</a></p> <p>International Civil Engineering Abstracts at <a href="http://www.emeraldinsight.com/icea/">http://www.emeraldinsight.com/icea/</a></p> <p>Computer &amp; Communications Security Abstracts at <a href="http://www.emeraldinsight.com/ccsa/">http://www.emeraldinsight.com/ccsa/</a></p> <p>Current Awareness Abstracts at <a href="http://www.emeraldinsight.com/caa/">http://www.emeraldinsight.com/caa/</a></p> <p>Limitations:</p> <p>Page numbers are separated by a hyphen with spaces on either side of it. You will need to manually remove the spaces after importing.</p>	Emerald filter
<b>InfoTrac (Gale)</b>	<p>From the E-Mail Delivery panel at the bottom of the marked list window, restrict the contents to “citation;” do not choose “full article.”</p> <p>Limitations:</p> <p>Records often have extraneous information in the title field, which must be removed manually after importing.</p>	InfoTrac (GALE) filter
<b>INIST</b>	<ol style="list-style-type: none"> <li>1. Click the <i>Enregistrer</i> button.</li> <li>2. Select the records you wish to download.</li> <li>3. Under “Quels champs?” choose “Tous les champs.”</li> <li>4. Under “Incluez” choose “Numéro de notice et nom de la base de données” and “Libellés abrégés.”</li> <li>5. Click the <i>Sauvegarde de notices</i> button.</li> </ol>	Various INIST filters are provided in the EndNote Filters folder.
<b>INNOPAC</b>	Save references in the “EndNote” format.	EndNote Import
<b>Knowledge Finder</b>	Place document in the Save file, and select the document. Choose <i>Export Selected Documents</i> from the File menu.	Various Knowledge Finder filters are provided in the EndNote Filters folder.

## Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
<b>Medscape</b>	After selecting the desired records and adding them to your clipboard, click the <i>Save or Email Clipboard</i> link. Save or e-mail your clipboard in PC or Mac MEDLARS format as a plain text (*.txt) file.	MEDLINE (Medscape) filter
<b>NERAC</b>	Save your file as plain text (*.txt).	NERAC
<b>OCLC FirstSearch</b>	<ol style="list-style-type: none"> <li>1. Mark the records you wish to download.</li> <li>2. In the navigation pane, click <i>Export</i>.</li> <li>3. Click the radio button next to "The marked records" or "A range of records."</li> <li>4. Click the radio button next to "EndNote."</li> <li>5. Click <i>Export</i> and save to a Text file.</li> </ol>	Various OCLC filters are provided in the EndNote Filters folder.
<b>Ovid</b>	<ol style="list-style-type: none"> <li>1. After selecting the references you wish to download, click <i>Results Manager</i>.</li> <li>2. Choose the following options: Fields: Complete Reference Citation Format: Reprint/Medlars (or Direct Export, if available)</li> <li>3. Click the <i>Email</i> or <i>Save</i> button.</li> <li>4. Save the file as plain text (*.txt).</li> </ol>	The appropriate Ovid filter will be selected automatically when using the <i>Direct Export</i> option. If you are using Ovid's multiple database searching, you must select the <i>Direct Export</i> citation format.
<b>ProQuest</b>	<ol style="list-style-type: none"> <li>1. Select the desired references, and then click the My Research Summary tab.</li> <li>2. Click the "Documents and Bibliography" tab.</li> <li>3. Choose "Export," then either "Export directly to ProCite, EndNote or Reference Manager," or "Download in a format compatible with ProCite, EndNote, Reference Manager and RefWorks." If you choose the former, make sure your data is displayed in a tagged format before saving as a text file.</li> </ol>	ProQuest filter
<b>PsycINFO</b>	<p><a href="http://www.apa.org/psycinfo">http://www.apa.org/psycinfo</a></p> <p>After marking the records you wish to download, choose <i>Full PsycINFO Record</i> then click the <i>Display Marked Records</i> button. Select the text, then copy and paste it into a text editor, saving the file as plain text (*.txt).</p>	Use the PsycINFO (APA) filter.

## Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
<b>PubMed</b>	<ul style="list-style-type: none"> <li>◆ For detailed instructions on how to search the PubMed database, see "Importing References from PubMed" in EndNote Help.</li> <li>You can also get detailed instructions from our EndNote Support site at:   <a href="http://www.endnote.com/support/faqs/Import/faq1.asp">http://www.endnote.com/support/faqs/Import/faq1.asp</a> </li> <li>◆ To search the PubMed database, go to:   <a href="http://www.ncbi.nlm.nih.gov/pubmed">http://www.ncbi.nlm.nih.gov/pubmed</a> </li> </ul>	PubMed (NLM) filter
<b>SilverPlatter WebSPIRS</b>	<ol style="list-style-type: none"> <li>1. Once you've obtained your search results, click <b>Save</b>.</li> <li>2. Select the following "Save Records" options:  Which fields?: All fields  Include: Record number and database name  Field labels: Short labels. </li> <li>3. Click the <i>Save Records</i> button.</li> <li>4. Use your Web browser to save the page as "Text Only" (do not save in HTML format).</li> </ol>	Various SilverPlatter filters are provided in the EndNote Filters folder.
<b>STN</b>	Set your communication software's options to capture text to a file. Type the command "Display All".	Various STN filters are provided in the EndNote Filters folder.
<b>UnCover (Ingenta)</b>	Using your email software, save references emailed to you as a "Plain Text" or "Text Only" file.	UnCover (INGENTA)
<b>VHL (Virtual Health Library)</b>	<ol style="list-style-type: none"> <li>1. After selecting the desired references, scroll to the bottom of the page, and then click <i>Your collection</i> (or "Su selección").</li> <li>2. Cancel the print dialog, and then save the screen as a plain text file.</li> </ol>	Various VHL filters are provided in the EndNote Filters folder.



## Output Formats and Corresponding Import Options

Information Provider	Recommended Download Format	Import Option
<b>All Databases Web of Science</b>	<p>Go to the <i>All Databases</i> or Web of Science Search page and perform a search.</p> <ol style="list-style-type: none"> <li>1. From the Results page, select the records that you wish to export to EndNote.</li> <li>2. Go to Output Records and select the option to output <i>Full Record</i> in step 2.</li> <li>3. Select <i>Save to Export to EndNote, RefMan, ProCite</i>.</li> <li>4. On the Processing page, click the <i>Export</i> button.</li> </ol> <p>You may also choose <i>Save to Tab-delimited</i> to save the references to a text file, and then import them into EndNote.</p>	ISI-CE filter
<b>Wilson</b>	<ol style="list-style-type: none"> <li>1. Click <i>Print Email Save</i>.</li> <li>2. Click <i>Export to Bibliographic Software</i>.</li> <li>3. Choose <i>The EndNote Filter</i>, and then click <i>Export</i>.</li> <li>4. Save to a text file.</li> </ol>	WilsonWeb filter
<b>WorldCat (OCLC FirstSearch)</b>	<ol style="list-style-type: none"> <li>1. Mark those references to be saved, and then click <i>Export</i>.</li> <li>2. Choose <i>Text File</i>.</li> <li>3. Click <i>Export</i>.</li> </ol>	WorldCat (OCLC) filter

### Direct Export from Web Pages

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

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

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## 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 7: 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.

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## Open the Sample Library

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If EndNote is not already running, start it and open the library called Sample\_Library\_X4 as shown in “Start EndNote” on page 27.

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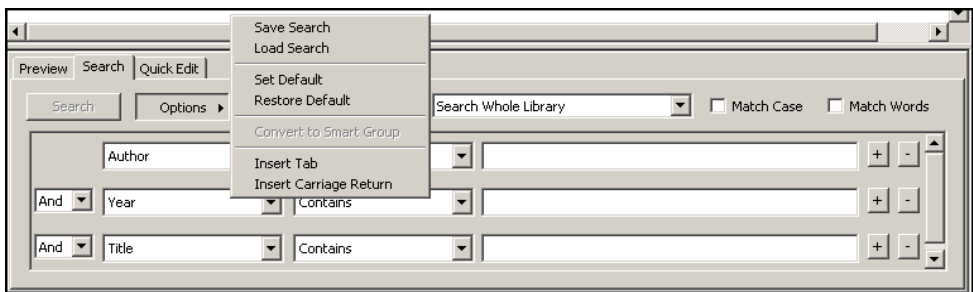
## Search for a Set of References

---

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. In the Tab pane, display the Search tab.
3. The Search tab remembers the last search you entered. To clear it, use the *Options* button to select *Restore Default*.



4. On the first search line:
  - a. In the first drop-down list, the Field list, 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, choose *Year*; from the Comparison list, choose *Is greater than or equal to*; and 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, choose *Year*; from the Comparison list, choose *Is less than or equal to*; and 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:

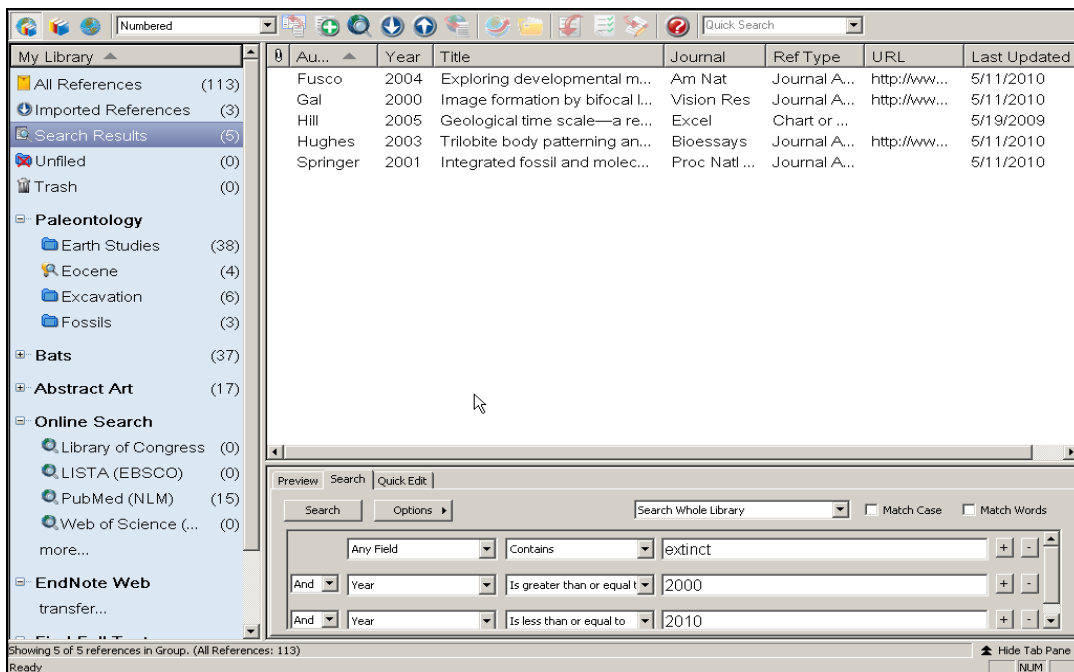
This search will find all references containing the text “extinct” that also were published between 2000 and 2010.

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.

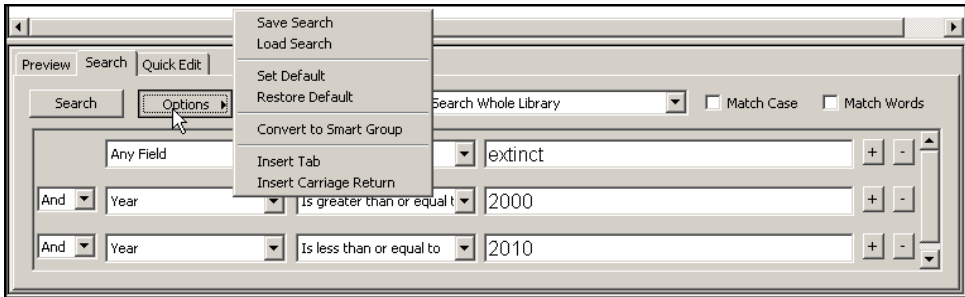
## Create a Smart Group

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 2000 to 2010.

### To use the search strategy to create a smart group:

1. Click the *Options* button and 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 press ENTER.

If you have already clicked away from the editable title, you can right-click Converted Search and choose *Rename Group*.

Each time a reference is added to the library or later 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, choose *Create from Groups*.
3. In the Group Name field, type “Paleontology Combo Group.”
4. Go to the Include References In fields. In the first field, choose *Earth Studies* from the Paleontology group set.
5. In the second Include Reference field, choose *Exocene*, and then select the *Or* Boolean operator.
6. Choose *Excavation* from the third list, and then select the *Or* Boolean operator.
7. Choose *Extinct* from the fourth list, and then select the *Or* operator.



8. Lastly, choose *Fossils* from the fourth list, but then select the *Not* operator.
9. Click the *Create* button to save your changes. Your combo group should appear in the Groups pane.



Your combined group should contain 48 references from the following custom groups and smart groups.

- ◆ Earth Studies
- ◆ Exocene
- ◆ Excavation
- ◆ Extinct

Notice your combination group does not contain any references from the Fossils group because we used the Not operator to exclude references from this group. Moreover, it does not contain any references from the other four groups that also appear in the Fossils group. That is, 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. Keep in mind that 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.

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## 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 8: Using EndNote While Writing a Paper with Microsoft Word

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**NOTE:** Continue with this part of the tour only if you use Microsoft Word 2003, 2007, or 2010. If you use a different word processor or if you have an older version of Word, see “Cite While You Write Commands (OpenOffice.org Writer)” or “RTF Files/Scanning and Formatting” in EndNote Help to learn how to cite EndNote references and create bibliographies in your papers.

---

EndNote’s Cite While You Write feature inserts EndNote commands into Word’s Tools menu in Word 2003 or on an EndNote tab in Word 2007 and 2010 to give you direct access to your references while writing in Microsoft Word. The Cite While You Write commands enable EndNote to do bibliographic formatting to the document that is currently open in Word.

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

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

---

### Open the Sample Library

If EndNote is not already running, start it and open the library called Sample\_Library\_X4.enl as show in “Start EndNote” on page 27.

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

---

### Open a Microsoft Word Document

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

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

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

## Cite EndNote References

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

### To start writing your paper and inserting citations:

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

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

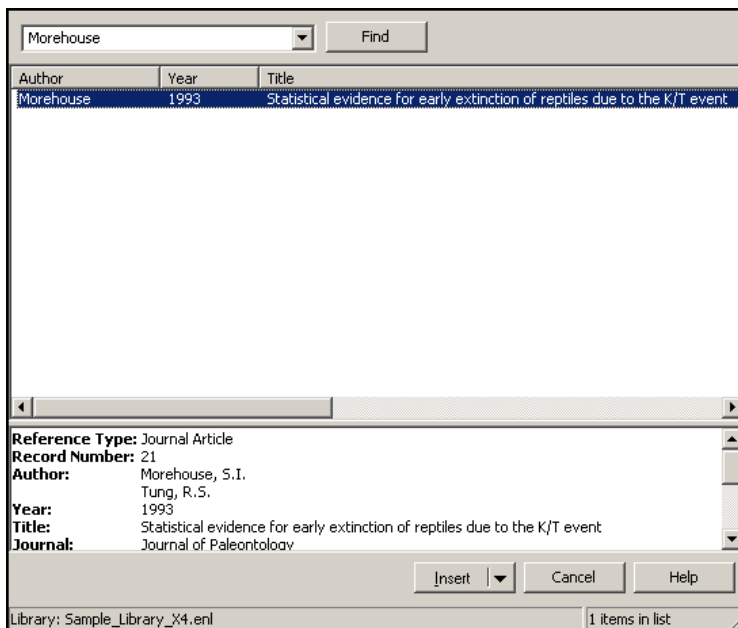
Now you are ready to insert a citation.

2. **Word 2003:** From the Tools menu, go to the *EndNote X4* submenu and then click *Find Citation(s)*.

**Word 2007 and 2010:** On the EndNote tab, in the Citations group, 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*.

EndNote lists the matching references.



4. Click *Insert* to insert the selected reference as a citation. There may be a delay the first time Word communicates with EndNote for the document.

EndNote not only inserts a citation, but Instant Formatting formats the citation in the currently selected 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 86 for information on how to turn this feature on and off.

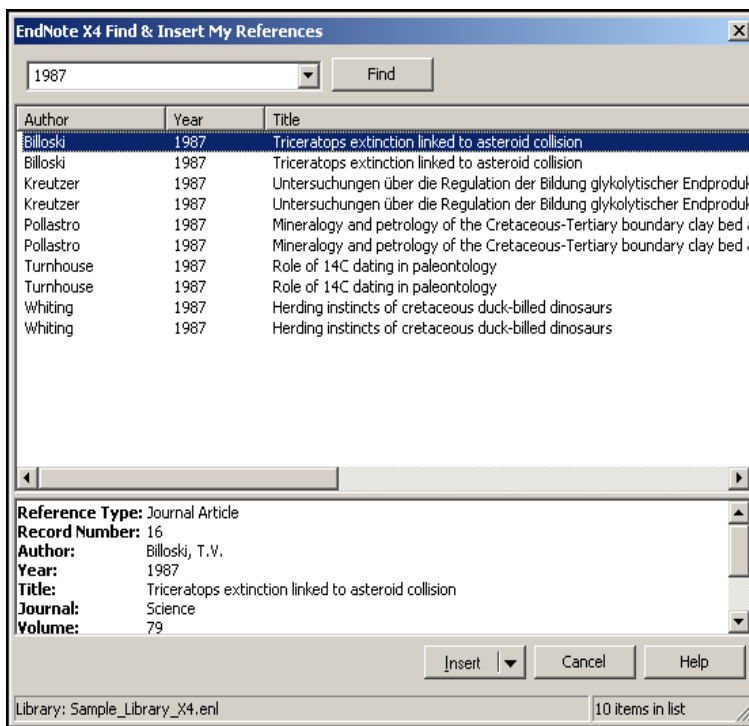
5. Add more text to the paper:

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

6. **Word 2003:** From the Tools menu, go to the *EndNote X4* submenu, and then click *Find Citation(s)*.

**Word 2007 and 2010:** On the EndNote tab, in the Citations group, click the *Insert Citation* icon.

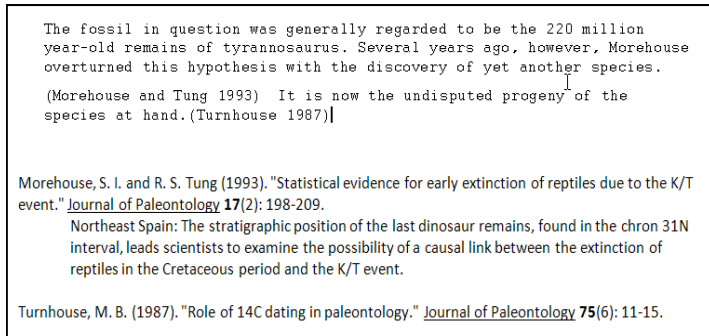
7. Type the date “1987” into the text box, and then click *Find*. EndNote searches all fields and lists the matching references.



8. Select the reference by the author Turnhouse, and then click *Insert*.

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

Your document text should look similar to this:



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 86.

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

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## Select a Bibliographic Style

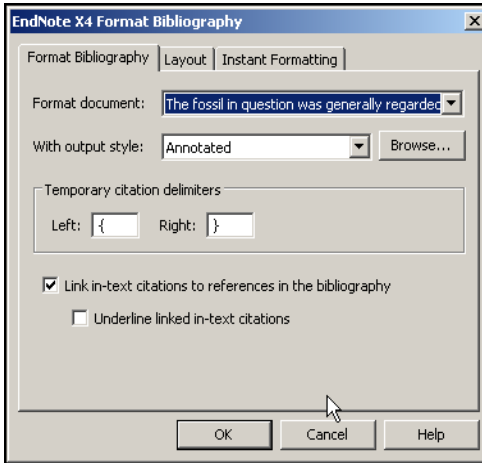
You can format your citations and bibliography as many times as you like, changing the output style and various other layout settings each time.

**To select the bibliographic style used for formatting:**

1. **Word 2003:** From Word's Tools menu, go to the *EndNote X4* submenu and choose *Format Bibliography*.

**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.



You can also turn off underlining and linked in-text citations by clearing the two check boxes.

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. For this example, click the *Browse* button next to “With output style” to display the list of output styles supplied with EndNote.
3. Select the *APA 6th* style, and then click *OK*. You can sort the list of styles by Name or by Category by clicking on a column header.
4. Click *OK* to leave the Format Bibliography dialog.

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

Your document text should look similar to this:

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

(Morehouse & Tung, 1993) It is now the undisputed progeny of the species at hand. (Turnhouse, 1987)

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

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

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**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, choose the Format Bibliography command again. EndNote will reformat the in-text citations and generate a new bibliography based on your changes.

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**NOTE:** More than 4,500 styles are available. To see the list of styles currently installed, choose *Output Styles* from the Edit menu in EndNote and then choose *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 installation program.

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## Edit a Citation

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

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

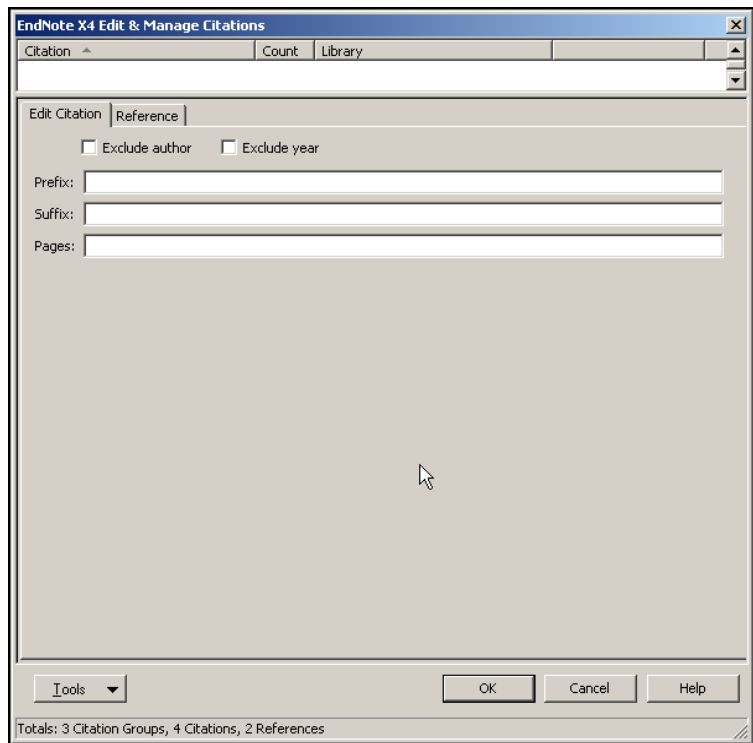
### To edit an individual citation:

1. Click anywhere on the Morehouse citation.



2. **Word 2003:** From the Tools menu, go to the *EndNote X4* submenu, and then click *Edit & Manage Citation(s)*.

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



3. Select the *Exclude Author* check box.
4. In the Pages field, type “34-35”.

---

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

---

5. Click *OK* to update the citation in your paper.
- Your document text should look similar to this:

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

(1993, pp. "34-35") It is now the undisputed progeny of the species at hand.(Turnhouse, 1987)

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

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

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.

To close the EndNote program, go to the File menu in EndNote and choose *Exit*.

---

## 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 figures and creating bibliographies.
- ◆ “Bibliographic Styles” to learn about and install output styles.
- ◆ More than 4,500 styles are available, although a typical EndNote installation includes only the 100 most popular styles in EndNote’s Styles folder. To see a list of them organized by discipline, choose *Output Styles* from the Edit menu and select the *Style Manager*.

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