

ENDNOTE® x7

Introduction to Endnote X7 Handbook

Contents

1.	Introduction	4
2.	Working with EndNote libraries	5
2.1	Starting EndNote	5
2.2	Opening and creating libraries	5
2.3	Backing up and compressing EndNote libraries	6
2.4	EndNote: main screen	7
2.5	Displaying EndNote toolbars	8
3.	Importing references into EndNote.....	9
3.1	Importing PDF files to create new references	9
3.1.1	Importing a PDF file into EndNote.....	9
3.1.2	Importing a PDF folder into EndNote	10
3.1.3	Setting PDF Handling Preferences for renaming and auto import of PDFs.....	10
3.2	Direct export from online search tools.....	11
3.2.1	Example using ScienceDirect.....	11
3.2.2	Example using PubMed.....	12
3.3	Importing references from a text file – getting data in the right format.....	13
3.3.1	Example using the Cochrane Library	13
3.4	Using the Capture tool to import information from a web page.....	14
4.	Search remote database	15
4.1	Connect to a remote database	15
4.2	Search the database	16
4.3	Save the references	16
5.	Adding references manually	17
5.1	Author field	17
5.1.1	Using commas in the Author field.....	18
5.2	File Attachments.....	19
5.3	Saving references.....	20
5.4	Figure reference type	20
6.	Managing references.....	21
6.1	Editing references.....	21
6.1.1	Rating references and marking as read/unread	21
6.2	Updating references	21
6.3	Annotating PDFs in the PDF viewer pane	22
6.4	Removing duplicates	23
6.5	Deleting references	24
6.6	Using groups	24
6.6.1	To create a new group:.....	25
6.6.2	To add references to a group:	25
6.6.3	To create a new smart group:	25
6.6.4	To create a Group Set:	25
6.6.5	To create a 'Group from groups' or combination group:	26
6.7	Add text to multiple references.....	27
6.8	Searching EndNote libraries.....	28
6.8.1	Quick Search	28
6.8.2	Search panel	28
7.	Printing and Saving References.....	29
7.1	Printing search references	29
7.2	Saving and export search references.....	29

7.3	Recommended output styles for exporting to other applications	29
7.4.	Using EndNote with LaTeX/BibTeX	30
7.5	Customising output styles	30
7.5.1	Field substitutions	30
8.	Cite While You Write (CWYW)	31
8.1	EndNote ribbon in Word	31
8.2	CWYW commands in EndNote	33
8.3	Inserting citations in your document.....	34
8.3.1	Using the Insert Citation command.....	34
8.3.2	Inserting citations from EndNote	35
8.4	Formatting a bibliography	36
8.4.1	Output style	37
8.4.2	Layout.....	39
8.4.3	Activating hyperlinks between in-text citations and the reference list	39
8.4.4	Categorize References.....	39
8.5	Editing and managing citations	41
8.6	Inserting notes in your document	43
8.7	Editing library references.....	44
8.8	Unformatting citations.....	44
8.9	Field codes and the travelling library.....	45
8.9.1	Removing field codes	45
8.9.2	The Travelling Library.....	46
8.10	Inserting figures in your document	47
9.	Getting Help.....	49
	Appendix A: Using Term Lists	50
	Appendix B: Creating a bibliography from multiple documents	51
	Appendix C: Configuring Full Text and OpenURL settings.....	52
	Appendix D: EndNote versions and synchronising libraries	54

1. Introduction

EndNote, how can it help you?

EndNote allows you to:

- Add references manually
- Import downloaded references from databases
- Direct export from Internet databases and e-Journals
- Import and search PDF files produced by publishers
- Search databases from within Endnote
- Store or link to PDF/Word/Image files with your references

- ← Search your own references
- ← Print or save a list of references
- ← Insert citations into your document
- ← Generate a bibliography in whatever style you require
- ← Insert figures or tables in your document

EndNote saves you time!

Where to get EndNote

The Library has purchased a site licence for EndNote which means that it can be freely downloaded and installed on any College-owned PC, laptop or Mac.

Registration is required, after which you will receive an email containing installation instructions. To register, go to the ICT Shop website:

<http://www3.imperial.ac.uk/ict/services/softwarehardware>

EndNote is installed on all Library cluster PCs, and many Departmental PC lab clusters.

Part of the site licence enables discounted copies of EndNote to be purchased for home use. Details are available from the ICT Shop website.

2. Working with EndNote libraries

2.1 Starting EndNote

In Windows, from the **Start** menu select:

All Programs > EndNote > EndNote Program

You may be prompted to set up an EndNote Online account which provides access to your EndNote library and allows you to add, edit and share references. You can register for EndNote Online at any time in the future by going to **Tools > Sync**.

For more information see *Appendix D*.

2.2 Opening and creating libraries

In EndNote each collection of references is known as a 'library'. Each library is a separate file with the suffix *.enl*, and a folder with the same name as the library ending *.Data*. The *.Data* folder is created in the same directory as the library and both file and folder must be kept together.

To open a particular library select **File > Open** then highlight the library required and click on it.

EndNote comes with a **Sample_Library**, which is located in the **EndNote X7 > Examples** shortcut that points to the Examples folder (C:\Program Files\EndNote X7\Examples or C:\Program Filesx86\EndNote X7\Examples).

To create a new library select **New** from the **File** menu. In the **File name** field, type the name of the new library and **Save**.

N.B. If you do not change the name it will be saved with the name My EndNote Library.

This will create the library as well as a folder with the same name as the library followed by *.Data*. The library and the folder will be stored, and must be kept, in the same location.

You should only need one EndNote library. For information about organising references see the section on Using Groups.

2.3 **Backing up and compressing EndNote libraries**

You should back up your library whenever you have made changes or additions. If you create or amend filters, output styles or connection files, it is a good idea to back up the entire EndNote directory on occasion.

EndNote libraries consist of a file and a folder:

Files have the file extension **.enl** (e.g. *Sample_Library.enl*)

Folders have a name ending in **.Data** (e.g. *Sample_Library.Data*)

If the *.Data* folder is missing, the library will not open correctly.

You can save your complete library (the **.enl** file as well as its associated **.Data** folder and all of its contents) to a single compressed **.enlx** file in order to easily back up your library or send a copy to a colleague.

Later, you can easily restore (unzip) the compressed library with EndNote.

To save to a compressed library file:

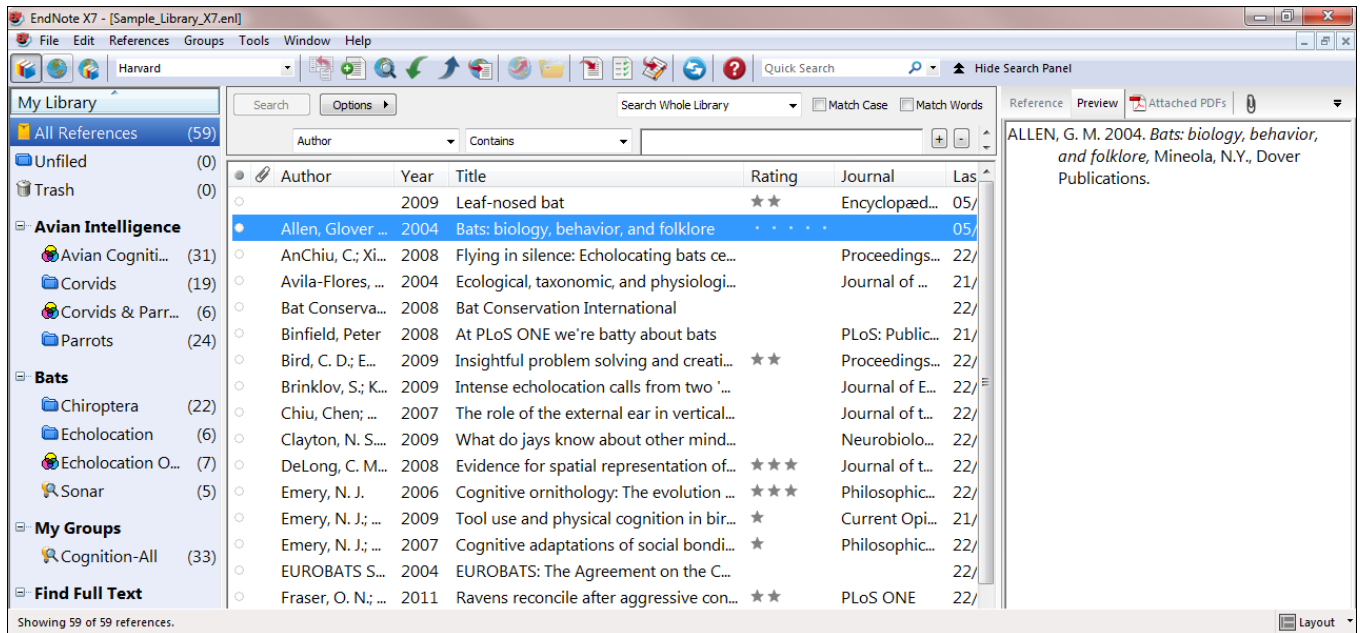
1. Open the library in EndNote.
2. From the **File** menu, select **Compressed Library (.enlx)** then click on **Next**
3. Use the file dialog to save to an EndNote Compressed Library (**.enlx**).

To restore a compressed library file:

1. Use EndNote to open the **.enlx** file as you normally would to use the library.

2.4 EndNote: main screen

This is the EndNote main screen.



To hide or show the preview window and for other options click on the **Layout** button in the bottom right corner.

The bottom left corner of the screen displays the number of references showing in the current library, in this case **Showing 59 of 59 references**.

The highlighted reference is displayed in the preview window in the currently selected output style. Different styles can be selected from the **Bibliographic Output Style** drop down menu on the Main toolbar or from **Edit > Output Styles > Open Style Manager**.

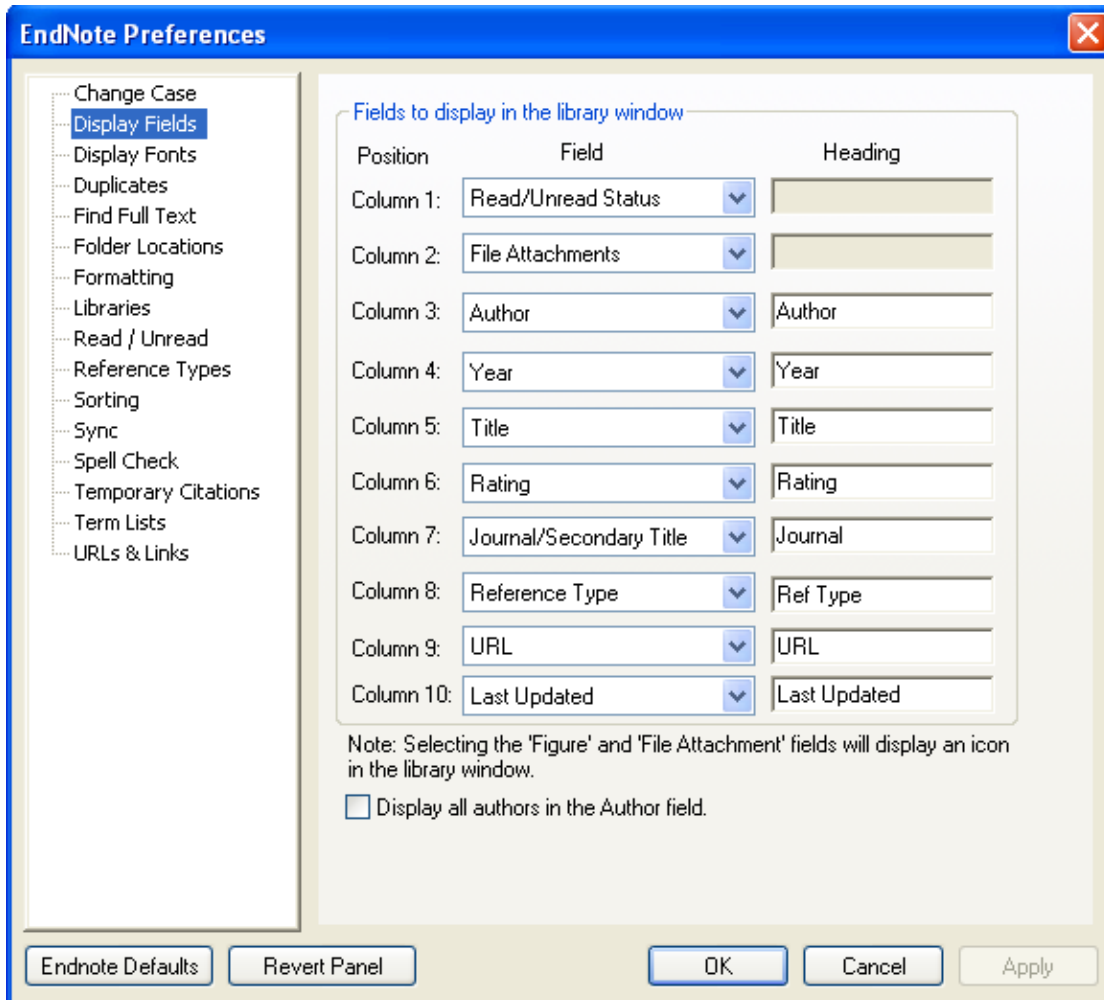
The **Bibliographic Output Style** drop-down lists all the styles you mark as “favourites” in the **Style Manager**.

The left panel of the screen displays a list of all the groups in the current library. **Groups** help you to organise your library by pointing to a subset of references within it.

The **Display Fields** row on the top of the library’s main screen allows you to sort your references in ascending or descending order by clicking on any of the field names.

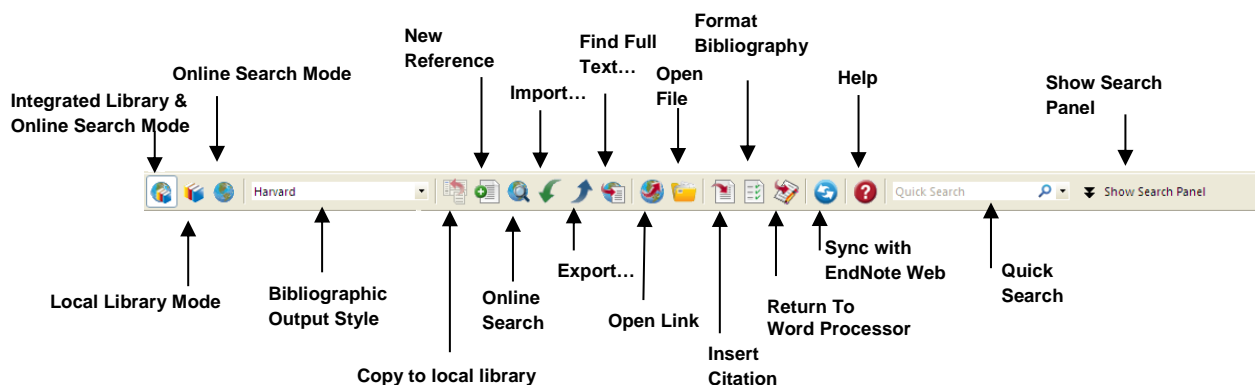
You can display up to ten fields at a time. To change the order drag and drop columns; to select other fields to display go to **Edit > Preferences > Display Fields** and choose any of the fields from the drop-down menu.

You can also choose to display all authors in the Author column by ticking the box to “Display all authors in the Author field.” To save these settings click **Apply**, then **OK**.



2.5 Displaying EndNote toolbars

Commands in the main toolbar are as follows:



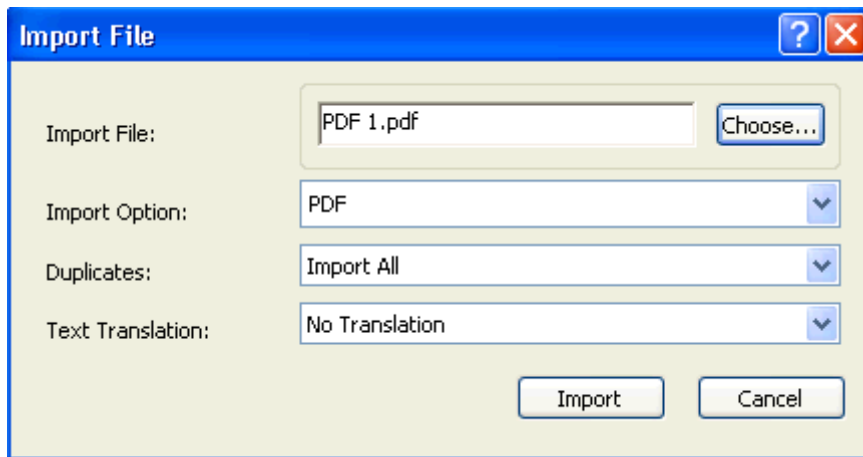
3. Importing references into EndNote

3.1 Importing PDF files to create new references

With this feature you can import saved PDF files, and folders containing collections of PDF files, which are then converted into EndNote references with the full text attached. This is done by extracting Digital Object Identifiers (DOI) from these files. The bibliographic content from the PDF files is captured and added to your EndNote library.

3.1.1 Importing a PDF file into EndNote

1. Open the EndNote library into which you want to import the references.
2. From the **File** menu, choose **Import File**.



3. Click the **Choose...** button and locate the file to import.
4. Select the PDF **Import Option** from the drop-down list.
5. Select an option from the **Duplicates** list:
 - **Import All**: imports all references including duplicates.
 - **Discard Duplicates**: imports all references except duplicates.
 - **Import into Duplicates Library**: duplicates are imported into a separate library.
6. Choose a **Text Translation** option if necessary. For most text files this will be **No Translation**.
7. Click **Import** to import the file.

Please note: documents must have been created as PDFs and contain a DOI for this feature to work. This data retrieval function will not work with scanned documents.

3.1.2 Importing a PDF folder into EndNote

1. Open the EndNote library into which you want to import the references.
2. From the **File** menu, choose **Import Folder**.
3. Click the **Choose...** button and locate the folder to import.
4. Select the PDF **Import Option** from the drop-down list.
5. Select an option from the **Duplicates** list:
 - **Import All**: imports all references including duplicates.
 - **Discard Duplicates**: imports all references except duplicates.
 - **Import into Duplicates Library**: duplicates are imported into a separate library.
6. Click **Import** to import the folder.

Please note: documents must have been created as PDFs and contain a DOI for this feature to work. This data retrieval function will not work with scanned documents.

3.1.3 Setting PDF Handling Preferences for renaming and auto import of PDFs

PDF Handling preferences allow you to define the automatic renaming process of your PDF documents, and to select a folder on your computer from which new PDFs will automatically be imported into your EndNote library.

1. Go to the **Edit** menu and then select **Preferences**.
2. Select the **PDF Handling** option.
3. Select one of the options provided, or choose **Custom** to create a personalized renaming criterion.
4. In the **PDF Auto Import Folder** panel, check the **Enable automatic importing** box to enable automatic importing of your PDFs into a library from a specified folder.
5. Select a folder on your computer or create a new folder when the Browser for Folder dialog displays.
6. Click **OK** to save your changes.
7. References related to PDFs imported from this folder will automatically be added to a group called **Imported References**.

3.2 Direct export from online search tools

Most websites and databases contain a direct export/download button that will send your search results directly to EndNote.

3.2.1 Example using ScienceDirect

In your browser go to the following address:

<http://www.sciencedirect.com>

Perform a search.

The screenshot shows the ScienceDirect search results page for the query 'dinosaur dna'. The page displays 879 articles found. The 'Export citations' link is highlighted with a red box. The search results are sorted by Relevance and Date. The first two results are visible:

- [The spinicaudatan *Tyloschista* and biostratigraphic significance for the age of dinosaur eggs in the Upper Cretaceous Majiacun Formation, Xixia Basin, Henan Province, China](#)
Original Research Article
Cretaceous Research, Volume 30, Issue 2, April 2009, Pages 477-482
Gang Li, Peiji Chen, Deyou Wang, David J. Batten
[Show preview](#) | [PDF \(1139 K\)](#) | [Related articles](#) | [Related reference work articles](#)
- [Testing the validity of the cytochrome B sequence from cretaceous period bone fragments as dinosaur DNA](#)
Cladistics, Volume 11, Issue 2, June 1995, Pages 199-209
Deshea L. Young, Yentram Huyen, Marc W. Allard
[Show preview](#) | [PDF \(768 K\)](#) | [Related articles](#) | [Related reference work articles](#)

Tick the records to be saved and click on the **Export Citations** link to export the references to EndNote in RIS format.

The screenshot shows the 'Export citations' dialog box. It contains the following options:

Content format:

- Citations Only
- Citations and Abstracts

Export format:

- RIS format (for Reference Manager, ProCite, EndNote)
- RefWorks Direct Export [? About Refworks](#)
- ASCII format
- BibTeX format

Export | **Cancel**

3.2.2 Example using PubMed

In your browser go to the following address:

<http://pubmed.gov>

Alternatively, use this link to identify yourself to PubMed as an Imperial College user:

<http://www.ncbi.nlm.nih.gov/sites/entrez?holding=igbiclib>

Perform a search, tick the references to be saved.

Next, click the **Send to** link to open the **Choose Destination** box. Select **Citation Manager** and click **Create File** to export the references to EndNote.

Choose Destination

<input type="radio"/> File	<input type="radio"/> Clipboard
<input type="radio"/> Collections	<input type="radio"/> E-mail
<input type="radio"/> Order	<input type="radio"/> My Bibliography
<input checked="" type="radio"/> Citation manager	

Generate a file for use with external citation management software.

Download 2 citations.

3.3 Importing references from a text file – getting data in the right format

When you download references from databases you need to make sure that you save them in a format compatible with EndNote. Few databases use the same format so it is impossible to provide detailed instructions for every resource.

Saving references in a text file and importing them into EndNote using an import filter is the best option if:

- a connection file is not available for your chosen database.
- you need to perform advanced searches in your chosen database using the native search interface.
- a direct export option is not available for your chosen database.
- a direct export option is available but you are using a computer that does not have EndNote installed.

There are two steps involved using the import option:

- Save your references in a text file in a format compatible with EndNote.
- Import the text file into EndNote using the correct filter.

You can perform these two steps immediately, or on separate computers, saving your file on one and then importing it on another when you have access to EndNote.

3.3.1 Example using the Cochrane Library

1. Perform a search in the Cochrane Library and select the references for export.
2. Click **Export Selected** and the **Export Options** dialog box will open
3. In the **Export Type** field select Mac or PC as appropriate.
4. In the **File Type** field choose to export the citation only, or include the abstract.
5. Click **Export Citation** and save the file as a text file (.txt.)
6. In **EndNote** go to **File > Import > File** and navigate to your saved text file.
7. Select **Cochrane Library (Wiley)** as your **Import Option**, click the **Import** button.

3.4 Using the Capture tool to import information from a web page

The Capture tool scans the bibliographic information presented on a Web page and creates a reference.

To install the Capture tool, log into your EndNote Online account and select the **Options** tab, click on **Download Installers** and **Capture Reference**.

You can drag and drop the **Capture** button to your Bookmarks/Favourites toolbar, or right click whilst hovering over the button to add to your favourites/bookmarks.

To capture a reference:

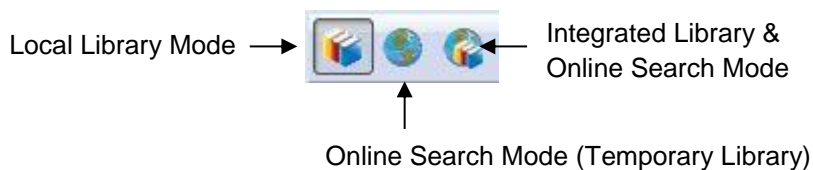
1. Navigate to a web page
2. Click the **Capture** button in your browser toolbar or bookmarks
3. Edit reference fields as necessary
4. Click the **Save to** button and select **EndNote** to save the reference to your library in EndNote Desktop.

Capture works best with compatible sources. Refer to the list of Capture Compatible Sources in the EndNote Online help pages for more information.

4. Search remote database

When searching remote databases you can select either the *Integrated Library & Online Search Mode* or the *Online Search Mode*.

Integrated Library & Online Search Mode results are downloaded directly to the currently open library. If you do not want to automatically download search results switch to *Online Search Mode* where results are downloaded to a temporary library, any references you wish to save must be copied to an existing library before switching back to *Local Library Mode*.



4.1 Connect to a remote database

The first step in searching a remote database is connecting to it using a connection file. EndNote provides pre-configured connection files for a large number of resources.

For a full list of connection files available visit the EndNote support pages (see Getting Help). If necessary, you can create or customise your own connections to Z39.50 compliant databases.

You will see a small selection of connection files under **Online Search** in the My Library window. Click on **more...** to see the full list. If you select a file from the full list, it will be added to the My Library window.

1. To connect, click on the resource name (e.g. PubMed) under Online Search. If for any reason the connection cannot be successfully established, EndNote will display an error message and close the connection. If you are asked for a username and password do not enter any details, simply click the **OK** button and you will be connected to the appropriate resource.
2. When the connection has been established, EndNote opens the Search tab for the resource ready for you to enter your search terms:

4.2 Search the database

1. From the field list drop-down menu, select the field you wish to search in, e.g.. *Title*. Enter your search term, e.g. *dinosaur*. Note that the comparison list is restricted to *Contains* for most remote searches.
2. The example shows the search using a second term, *Year Contains 2001*, and the connector **And** to narrow down the results.



The screenshot shows the EndNote search interface. At the top, there are buttons for 'Search' and 'Options', a dropdown menu set to 'Search Whole Library', and checkboxes for 'Match Case' and 'Match Words'. Below this, there are three search criteria rows. The first row has 'Title' selected in the field dropdown, 'Contains' in the comparison dropdown, and 'dinosaur' in the text input field. The second row has 'And' selected in the connector dropdown, 'Year' in the field dropdown, 'Contains' in the comparison dropdown, and '2001' in the text input field. The third row has 'And' selected in the connector dropdown, 'Title' in the field dropdown, 'Contains' in the comparison dropdown, and an empty text input field. Each row has '+' and '-' buttons to the right.

3. When you have finished, click on the **Search** button. EndNote sends the search request to the remote database which returns the number of references that match.
4. The window displays the number of references retrieved by the search. If the number is too large you can click **Cancel** and refine the search. Once you are satisfied with the number of results, you can retrieve all or some of them by clicking **OK**. The references are downloaded and appear in the appropriate Online Search group.

4.3 Save the references

If you are in *Integrated Library & Online Search Mode* the downloaded results are automatically saved in the current open library.

If you are in *Online Search Mode* you should review each reference and decide which to keep and which to discard. Highlight the references to be kept, from the **References** menu choose **Copy References To**, and copy the references to a **New Library** (which you will need to create at this point), or **Choose Library** from the previously created libraries or to an already opened EndNote library listed in the menu.

When you switch from *Online Search Mode* to *Integrated Library & Online Search Mode* EndNote warns you that the online references will be discarded. If you have saved what you needed, you can click **OK**.

5 Adding references manually

There will be times when you will need to add references manually by typing them into the Reference window. For this example we are going to use the following citation:

Michael Foote, Arnold I. Miller. Principles of Palaeontology. 3rd ed. New York: W. H. Freeman & Co Ltd; 2007.

To enter references manually:

- Make sure that your required library is open.
- From the **References** menu, select **New Reference** or press **Ctrl+N**.
- In the **Reference Type** box, click on the drop-down menu to select an appropriate reference type, e.g. *Book*.
- Journal Article is the default Reference Type however you can change the default to any other type of reference in the list:
- Click on **Edit > Preferences > Reference Types** and select your own default reference type from the drop-down menu, click **Apply** then **OK**.
- To add information to any field, select the desired field by left-mouse clicking on the field and making sure the cursor is blinking on the field. You can also select a field and its contents by pressing the **TAB** key to move to the field. **SHIFT+TAB** selects the previous field.

5.1 Author field

To add author names select the **Author** field and enter one author name per line.

1. Enter the last name of the first author followed by a *comma* “,” and then the first name. If you are entering initials instead of the full names type a *full stop* “.” between the initials or put a *space* between them, otherwise EndNote treats the initials as a single name. Alternatively, you can enter the author’s first name, then surname with no added punctuation. If the author entry appears in red text it means that the author name is new to this library and does not exist in the corresponding term list. When you have finished press **Enter** to go to the next line.

Author Foote, Michael Miller, Arnold I.
Year 2007
Title Principles of Paleontology

2. Enter the second author’s name on a new line. As you type, EndNote may display a highlighted suggestion if it finds a match in the author term list. This is because the “Suggest terms as you type” feature of the Term Lists under **Preferences** has been turned on. To accept the suggested term, simply press **Enter**. (There is no highlighted suggestion in the above example. This is because it is the first time that the authors’ names have been added to this library.)

There are three fields in EndNote that are associated with **Term Lists**, these fields are; Author and Editor names, Journals, and Keywords. However, term lists can also be created for other fields. These lists are updated automatically as you enter new terms into these fields.

The term lists are saved in the *.Data* folder of the library. Term lists help with data entry and improve accuracy and consistency. For more information about term lists see *Appendix A*.

5.1.1 Using commas in the Author field

- All text before the comma is interpreted as a last name.

de la Rubia, J. M.

- If you don't use a comma the last word in the text will be interpreted as the last name.

Imperial College London

In this case "London" will be treated as the last name and "Imperial College" as the first name.

- To enter corporate authors, put a comma at the end of the name.

Imperial College London,

- If the corporate name contains a comma, you will need to add an extra comma:

Imperial College London,, School of Medicine

Corporate name comma



Extra comma entered

Year field

Generally, you should enter the four digits of the publication year, e.g. 2007.

Title field

Enter titles without a full stop or any other punctuation at the end. Do not press the Enter key while typing titles and for long titles just let the text wrap to the next line.

Publisher fields

Enter the City and Publisher name without a full stop or any other punctuation at the end.

Edition

EndNote does not modify the text of the Edition field when formatting your bibliography. Therefore, make sure to enter the suffix (st, nd, th and so on) if you need it to appear like that in your bibliography.

Label field

The Label field can be used for any purpose, for instance as an additional field for identification or categorizing the reference.

Keywords field

The Keywords field is another field associated with a term list, so it will suggest keyword names as you enter them into the field providing it finds a match in the keywords term list. New entries will appear in red text. Press **Enter** to go to the next line to add another keyword or **TAB** to go to the next field.

URL field

Type or paste a valid URL into the field and it becomes a hyperlink. To add multiple links into the field enter each link on a separate line.

5.2 File Attachments

You can use the “File Attachments” field to store a link to a PDF or any other electronic file. In a reference, when you link a file to the “File Attachments” field you will have the choice of saving a relative or absolute link to the file.

1. From the **References** menu, choose **File Attachments** and select **Attach File**, or click on the paperclip icon in the menu bar.
2. In the **Select a file to link to the reference** dialog box navigate to your chosen file and click **Open**.

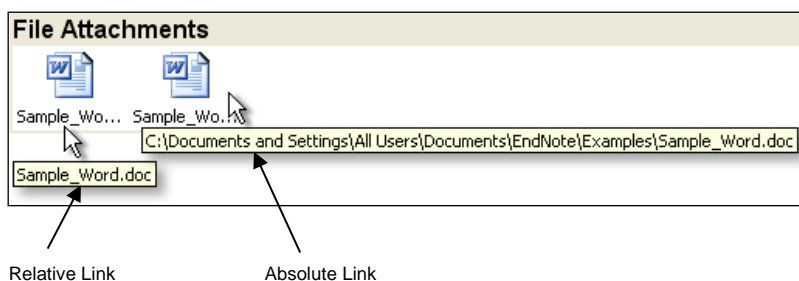
Note the check box on the bottom left of the Window “Copy this file to the default file attachment folder and create a relative link.” This will give you two options:

- a) **Relative Link:** when the box is checked, a copy of the original file will be created and placed in the `.Data` folder of the corresponding EndNote library.
- b) **Absolute Link:** when the box is un-checked, EndNote will create a full path and filename to the original file.
However, you should remember that the absolute links are static not dynamic. This means if you ever change the location of the file the link will not work and EndNote will not be able to access the file unless you update the field with the new link.

Another way of linking a file to the “File Attachments” field is by ‘dragging and dropping’ the file onto the reference in which you want to create the link, either in the Library window or the Reference window. The default setting determines whether the file is saved as a relative link or an absolute link. By default the “Copy new file attachments to the default file attachment folder and create a relative link.” box is checked, you can change this setting by un-checking the box in order to save absolute links. To do this, click on **Edit > Preferences > URLs & Links**.

To see which type of link is used in the “File Attachments” field in a reference, move the pointer over the icon of the file and EndNote will display a tooltip for that linked file.

If the file is linked with a relative link only the filename will appear, however, if the link is absolute the full path and filename will be displayed.



If you have attached a PDF file it is possible to view and annotate this within EndNote. See **Annotating PDFs in the PDF viewer pane** for further information.

5.3 Saving references

You can save a reference as you go along by selecting **Save** from the **File** menu, or press **Ctrl+S**, you can also click on the 'x' at the top right hand corner of the window and this will prompt you to save and close the reference.

Once a reference is saved its empty fields can be hidden in order to view only those fields that contain data, this function also helps to minimise scrolling up and down the reference. To hide or reveal the empty fields of a reference click on the double triangle icon on the top right corner of the reference window.

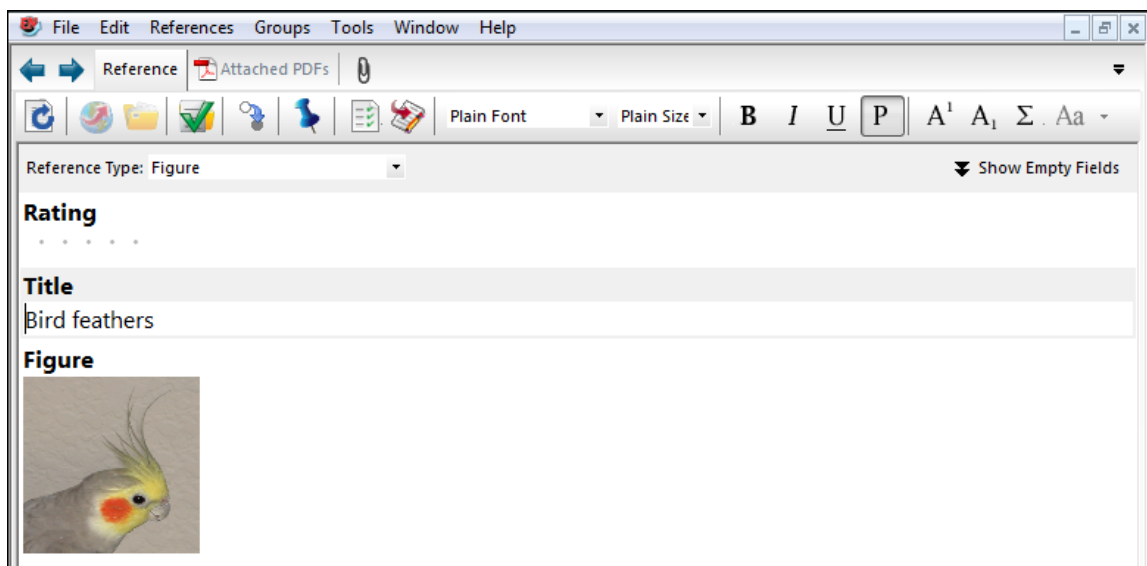
5.4 Figure reference type

The Figure, Equation, and Chart or Table reference types should be used if you are going to use the Cite While You Write feature and Microsoft Word to insert and manage images in your documents. This section shows how to add a new Figure reference which will be used later in the section on Cite While you Write (CWYW).

1. From the **References** menu, select **New Reference** or press **Ctrl+N**.
2. From the **Reference Type** list, select **Figure** as your reference type.
3. Add a title for your figure in the Title field, e.g. *Bird feathers*.
4. The Figure field can be used to insert a graphic file or an object (a file attachment) into a reference. The copy of the image or the object is saved in the *.Data* folder of the library. Each reference can accommodate only one graphic or object file. To insert an image or object into a reference, from the **Reference** menu, select **Figure** and then **Attach Figure** or use the **Attach Figure** button on the New References toolbar.

Here we are going to insert an image, so while the Figure field is selected click on the **Attach Figure** button on the toolbar.

5. In the **Attach Figure** dialog box click on the **Choose File** button to locate the "Feather2.BMP" file in the Examples folder (C:\Program files\EndNoteX6\Examples)
6. Select "Feather2.BMP" and click **Open**.
7. The Caption field is located directly under the Figure field. Use this field to write a short description for your image or file which will appear with the image in a word processing document using Cite While You Write feature, e.g. *Bird feathers*.



6. Managing references

6.1 *Editing references*

1. In the Library window, double click the reference. The reference appears in a separate Reference window. Or highlight the reference and click the **Reference** tab in the Preview pane.
2. Click in the field you wish to change, add, delete or edit text.
3. When you have finished if you opened the reference in a separate window, from the **File** menu select **Close Reference** or click on the 'x' in the upper right corner or press **Ctrl+W**. If you have edited the reference from within the Preview pane, from the **File** menu select **Save** or click on another reference within your Library.
4. You will see a message prompting you to save the changes (unless you have previously ticked the box to not display the message again).

6.1.1 Rating references and marking as read/unread

You can rate your references using a star system, with a range of 1 to 5 stars. The rating column appears in the default display. You can sort your references according to their rating, or use rating as a search criteria.

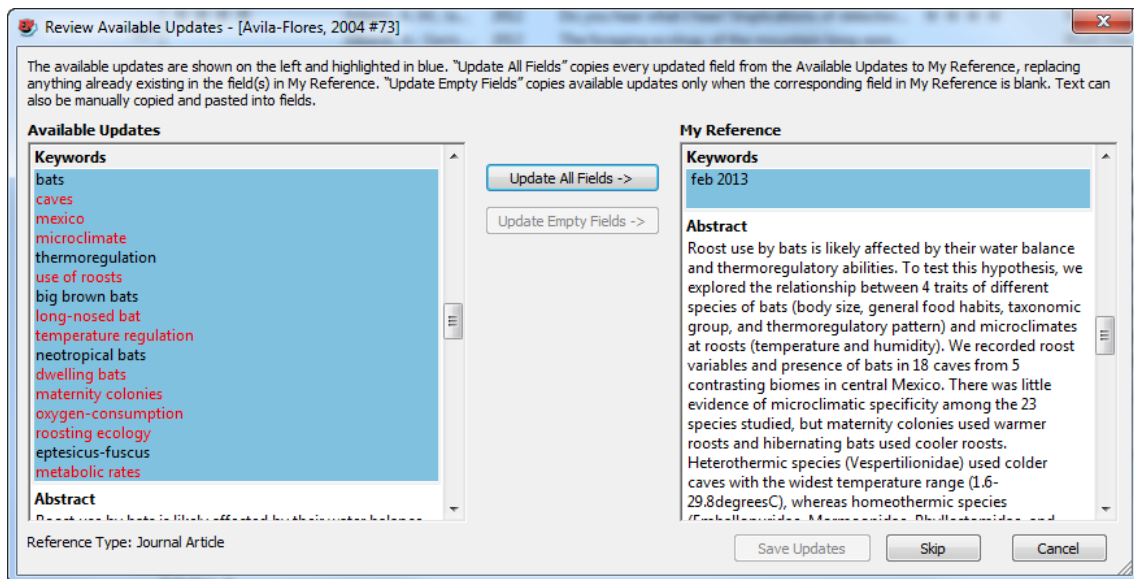
References can be tagged as read or unread. This can be done manually, or references can automatically be tagged as read if they have been viewed.

To amend the settings for Read/Unread, go to **Edit>Preferences>Read/Unread**.

6.2 *Updating references*

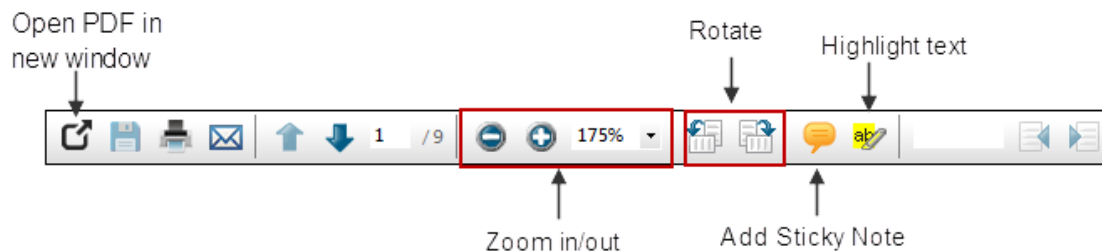
Individual references can be updated by retrieving additional or new information from sources such as Web of Science and PubMed.

1. Select a reference to update and select **Find Reference Updates** from the **Reference** menu. If EndNote cannot find any updates a dialog box will appear advising this.
2. The **Review Available Updates** dialog box will open and display both the existing and updated reference. Fields where the data is different are highlighted.
3. Click the **Update All Fields** button to accept all available field updates, this will overwrite any existing data in these fields.
4. Click the **Update Empty Fields** to update only those fields which are currently empty.
5. If you wish to update only specific fields you can copy and paste data from the new reference into the existing reference.
6. Click **Save Updates** to save any amendments.



6.3 Annotating PDFs in the PDF viewer pane

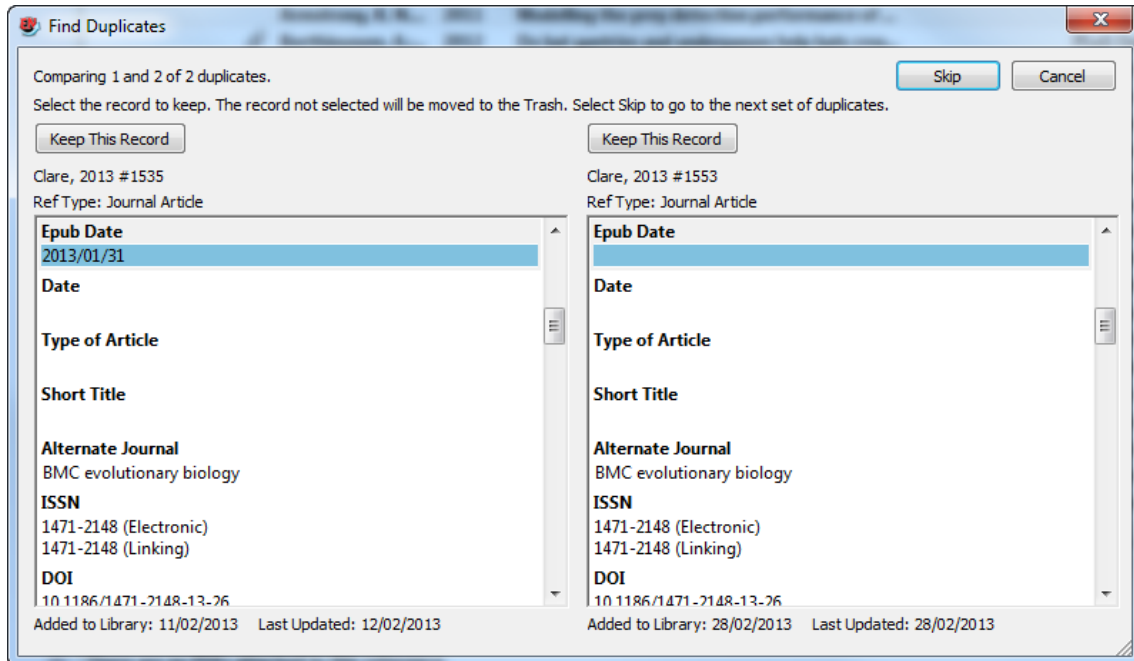
PDFs attached to references can be viewed and annotated in the PDF viewer pane using the toolbar. PDFs can also be attached to references in the viewer pane. The buttons in the toolbar are:



1. Select a reference with a PDF attachment, and then click the Attached PDFs tab. The PDF will be displayed in the viewer pane which can be resized if desired, or click the open PDF in a reference window button if preferred.
2. To highlight a section of text, select it and click on the **Highlight Text** icon in the toolbar
3. To add a sticky note click the **Sticky Note** icon in the toolbar, navigate to the section where you want the note and click the left mouse button.
4. Enter your note in the textbox and click the **Save** icon.

6.4 Removing duplicates

1. Make sure that your required library is open and all the references are shown.
2. From the **References** menu, select **Find Duplicates**.
3. If any duplicates are found they are displayed in a *Find Duplicates* dialog box, where you can compare duplicates and decide which version to keep and which to delete.



4. A new group called Duplicate References will appear in the groups area once you have finished.
5. If no duplicates are found, a message will be displayed.

By default, checking for duplicates only compares the *Author*, *Year*, *Title* and *Reference Type* fields. To add or remove fields for detecting duplicates, click on **Edit > Preferences > Duplicates**.

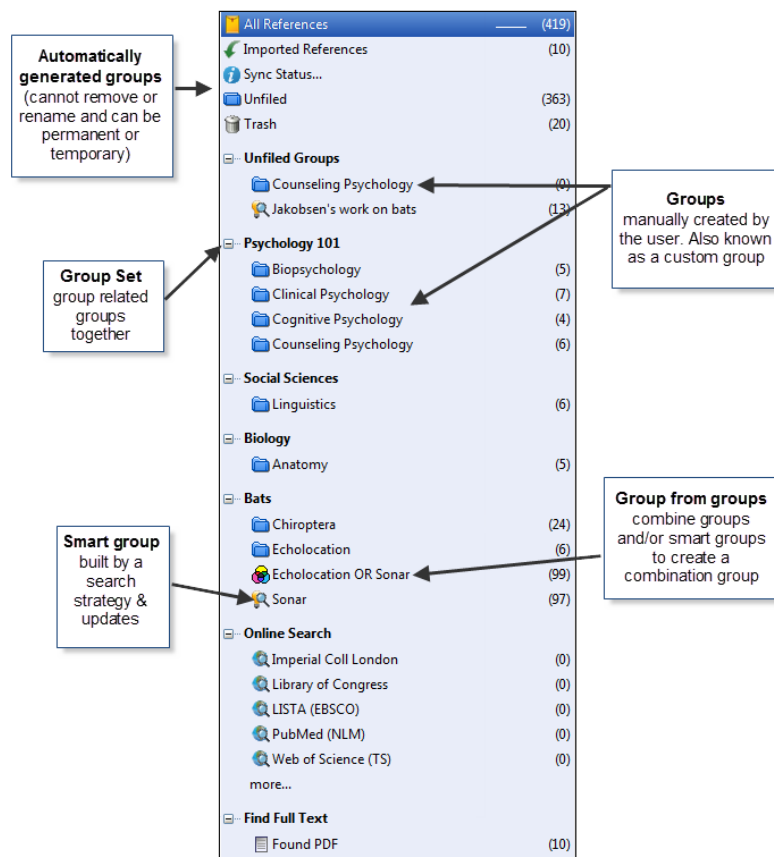
6.5 Deleting references

1. Select the reference(s) in the Library window by highlighting them.
2. From the **References** menu, select **Move References to Trash**, or press **Ctrl+D** or press the **Delete** key on your keyboard.
3. Deleted references are moved to the Trash group where they will remain until you choose to empty trash from the References menu or when prompted on exit.
4. To restore deleted references to your EndNote Library, select the **Trash** group, highlight the reference(s) you wish to restore and either drag them into the **All References** group, right click and select **Restore to Library** or from the **References** menu, select **Restore to Library**.

6.6 Using groups

Groups make it easy to break a large library into subsets for later viewing. A group simply points to a subset of references that already exist in the library.

Automatically generated groups include **All References**, **Unfiled** and **Trash**. Custom groups and smart groups are created by you to help organise your library.



The left pane of the Library window lists all of the groups in the current library. You can hide or show the groups pane from the Groups menu.

6.6.1 To create a new group:

1. From the **Groups** menu, select **Create Group** or right-click in the Groups pane on the left hand side of the screen and select the option **Create Group**.
2. The new group is displayed in the left pane with the name *New Group* highlighted, rename the group by typing in the new name.

6.6.2 To add references to a group:

1. Highlight the reference(s).
2. *Either:*

Use the mouse to drag and drop the reference(s) to the desired group

Move the mouse over the highlighted reference(s), right click and select **Add References To**, then select the desired group name.

From the **Groups** menu, select **Add References To**, then select the desired group name.

6.6.3 To create a new smart group:

A smart group is a custom group that contains a search strategy. Any reference that is added or modified that matches the search strategy will automatically be added to the smart group.

1. From the **Groups** menu, select **Create Smart Group** or right-click in the Groups pane on the left hand side of the screen and select the option **Create Smart Group**.
2. Enter the search strategy for your group and click on **Create**.
3. The new group is displayed in the left pane with the name *New Smart Group* highlighted, rename the group by typing in the new name.

6.6.4 To create a Group Set:

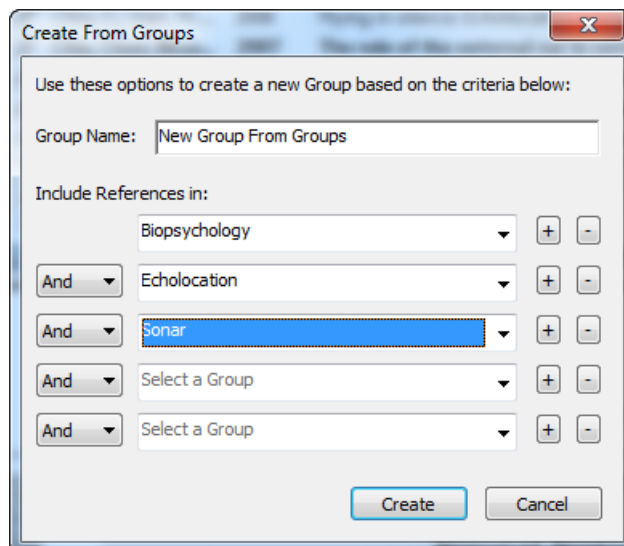
You can organise your references by creating Group Sets. These can contain any combination of custom groups and smart groups. Permanent Group Sets include **Online Search** and **Find Full Text**.

1. From the **Groups** menu, select **Create Group Set** or right-click in the Groups pane on the left hand side of the screen and select the option **Create Group Set**.
2. The new group set is displayed in the left pane with the name *New Group Set* highlighted, rename the group by typing in the new name. You can drag groups to move them from other group sets to the new group set, or you can create new custom groups, smart groups and combination groups under the new heading.

6.6.5 To create a 'Group from groups' or combination group:

You can combine custom and smart groups together using AND, OR and NOT search operators to create new, useful combined group sets. Save references in custom and smart groups, and then save these sets of groups as a combined group set.

1. From the **Groups** menu, choose **Create from Groups**
2. Enter a name for the combination group.
3. In the fields under the Include References heading, select up to 10 custom and/or smart groups to use as your search criteria.
4. Use AND, OR, NOT to include or exclude references from custom and/or smart groups in your combined group set.



6.7 Add text to multiple references

You can use the **Change/Move/Copy Fields** feature to add text to the same field in a group of references.

Note: The **Undo** command cannot be used to undo changes made using this feature.

To change the contents of a field:

1. Determine which references you want to modify. Make sure only those references are showing in the Library window.
2. Choose **Change/Move/Copy Fields** from the **Tools** menu.
3. Under the **Change Fields** tab, choose the field that you want to modify from the **In:** list.
4. Select one of the following options:
 - **Insert after field's text:** Appends text at the end of the chosen field. It does not modify the text already in the field.
 - **Insert before field's text:** Inserts the text at the beginning of the chosen field. It does not modify text that is already in the field.
 - **Replace whole field with:** Replaces the entire contents of the field with the text entered in the text box.
 - **Clear field:** Deletes the entire contents of the chosen field. It is not necessary to put any text into the text box.
5. In the text box, type the text that should be added to the field.
6. Use the **Insert Special** command to insert a Carriage Return to place the new text on a new line if required.
7. Click **OK**. EndNote will prompt you to confirm the changes.
8. Click **OK** to continue with the changes, or click **Cancel** to cancel this operation.

6.8 Searching EndNote libraries

EndNote provides two search tools: Quick Search from the Main toolbar, and a Search panel for more advanced searches.

6.8.1 Quick Search

To search all fields in the current library type the search term in the box in the Main toolbar and press Enter:

The results are displayed in a temporary Search Results group:

6.8.2 Search panel

For more complicated searches or to search specific groups use the Search panel.

To use the Search panel:

1. It is possible to hide or show the search panel by clicking on the button in the menu bar.
2. If you wish to search a specific group or set of references make sure they are displayed in the Reference List pane. You can also search an entire library.
3. Search results are displayed in the **Search Results** group within the Groups pane. The status area at the bottom of the window shows how many references were found. This group displays only the results of the search. To display all the references in the library again, select the **All References** group from the Groups pane.

Search Options:

Click on the Options button to use any of the following functions:

Save Search - Saves a search strategy for later use.

Load Search - Loads a previously saved search strategy.

Set Default - Saves the current configuration of the Search window as your default except for the "search term".

Restore Default - Clears out all of the currently entered search terms and any other changed configuration and resets all of the settings back to the default configuration.

Convert to Smart Group – Creates a Smart group using the current search strategy. The group name will be highlighted for you to rename it.

Insert Tab - Allows inserting a Tab in the search line.

Insert Carriage Return - Allows inserting a Carriage Return in the search line,

7. Printing and Saving References

Printing or saving references allows you to:

- Create a reading list or bibliography not associated with a specific document
- Export references to other bibliographic software packages (e.g. RefWorks, BibTeX)
- Export references to other applications (e.g. Excel, Access)

The printed or saved format is controlled by the current bibliographic output style.

7.1 Printing search references

1. Select the references you wish to print. To preview a list of selected references choose **Show Selected References** from the **References** menu.
2. From the **File** menu, choose **Print** or press **Ctrl+P**. A print dialogue box will open. Once you click on the **Print** button, your selected references will be printed in the current bibliographic output style.

7.2 Saving and export search references

1. Select the references you wish to save by following the instructions in step 1 above.
2. From the **File** menu, choose **Export**.
3. Select the **file type** for the exported file. For an independent bibliography, choose either Rich Text or HTML format, as these formats support styled text.
4. Provide a name for the export file, and select the desired drive and folder.
5. From the "Output style" list at the bottom of the dialog box select the required style (or choose "Select Another Style" to choose from all available output styles).
6. Choose **Save**.

7.3 Recommended output styles for exporting to other applications

Application	Output Style
Reference Manager RefWorks	RefMan (RIS) Export
Excel Access	Tab Delimited
LaTeX/BibTeX	BibTeX Export
EndNote (transferring references between libraries)	EndNote Export

7.4. Using EndNote with LaTeX/BibTeX

LaTeX is a mathematical typesetting programme that enables the easy creation of documents. BibTeX is a bibliographic tool that can be used with LaTeX to manage references and create a bibliography.

It is not possible to use EndNote's Cite While You Write functionality with LaTeX/BibTeX. However it is possible to use the reference management features of EndNote and then export a reference list in BibTeX format.

More information about using EndNote with LaTeX/BibTeX is available at this website:

<http://libguides.mit.edu/content.php?pid=234127&sid=1937425>

7.5 Customising output styles

Endnote includes thousands of output styles. If you cannot find a suitable style for your purposes you can create a new one, or modify an existing one that is nearest to what you need. For help with customising styles see the *Getting Started* EndNote Manual available in electronic (PDF) form installed with the EndNote program, or search the Help files.

7.5.1 Field substitutions

EndNote allows you to substitute information from another field if certain fields are empty. For example, if the DOI field is empty you can choose to substitute it with the URL field. This substitute field will appear in your bibliography and/or footnote.

Field substitution is available for the following fields:

- DOI
- PMCID
- Volume and Pages

To substitute field values in a bibliography and/or footnote:

1. From the Edit menu select **Output Styles > Open Style Manager**.
2. From the Output Style Manager window highlight the style you wish to change and click the Edit button.
3. Select Field Substitutions from under the Bibliography and/or Footnotes heading.
4. Check the box next to each option to activate the field substitution.
5. To save the amendments select Save As from the File menu and enter a new name for your modified style.

8. Cite While You Write (CWYW)

EndNote enables you to locate and insert citations and figures in your document without leaving your word processor. This is achieved using the EndNote **CWYW** feature within **Microsoft Word**.

CWYW is compatible with Microsoft Word 2007-2013, Apache OpenOffice 3.X and is integrated into Apple Pages '09.

For complete word processor compatibility information, visit the EndNote website at:

<http://endnote.com/en/requirements>

If your word processor is not compatible, or your document consists of multiple Word files, you should consider using EndNote's **Format Paper** feature (see *Appendix B*).

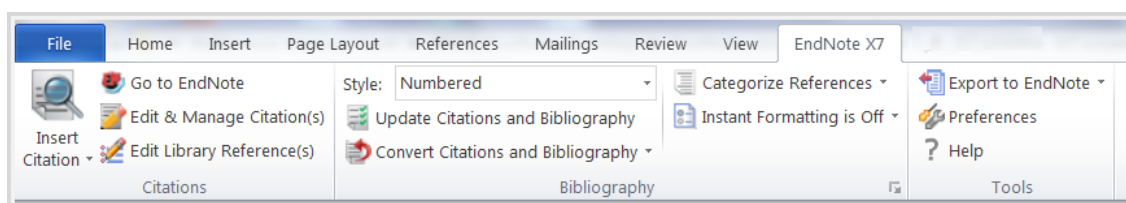
8.1 EndNote ribbon in Word

Word includes Microsoft's own bibliography feature which appears on the ribbon under the References tab in the Citations & Bibliography group. **Do not confuse this with EndNote's CWYW.**








The default installation of EndNote makes CWYW the default reference management tool in Word and disables the Microsoft feature.

The CWYW commands appear on the ribbon under the EndNote tab. If you do not see the tab, refer to the instructions at:











<http://endnote.com/support/faqs>








Citations Group

	Insert Citation... Search for references to select and insert as citations in your document.
	Insert Citation > Insert Selected Citation(s) Insert a citation for each reference currently selected in the open EndNote library.
	Insert Citation > Insert Note... Add custom text citations to your document when using a numbered output style.
	Insert Citation > Insert Figure... Search for a reference that contains a figure, and insert a figure or table citation in your document. The citation is numbered, and the figure or table is automatically added to the document.
	Go To EndNote Bring EndNote to the front of your screen. This command launches EndNote if it is not already running.
	Edit & Manage Citation(s) Edit existing individual or multiple citations. You can omit author and/or year from citations, or add prefix or suffix text to citations.
	Edit Library Reference(s) Select citations in your document, then choose this command to directly edit the corresponding references in EndNote.

Bibliography Group

	Style Select an output style from the list to format (or reformat) your paper according to the rules of the selected style. The styles listed are marked as “favourites” in the EndNote style manager.
	Update Citations and Bibliography Format (or reformat) your paper according to the rules of the selected style. The formatting process replaces the temporary citations in your paper with formatted citations, and builds a bibliography at the end of the document. This command also updates your figure and table citations plus the formatted figures and tables within or at the end of the document.
	Convert Citations and Bibliography > Convert to Unformatted Citations This removes style formatting for the selected citations, and leaves temporary citations which usually consist of the author’s last name, the year, and the record number surrounded by delimiters. Use <i>Update Citations and Bibliography</i> to format the paper again.
	Convert Citations and Bibliography > Convert to Plain Text Save a copy of your document without formatted Cite While You Write field codes. Formatted citations and the bibliography are saved as text.
	Convert Citations and Bibliography > Convert Reference Manager Citations to EndNote Convert any Reference Manager citations in this document to EndNote Cite While You Write citations.
	Convert Citations and Bibliography > Convert Word Citations to EndNote Convert any Word citations in this document to EndNote Cite While You Write citations.
	Categorize References > Group References by Custom Categories This allows you to group your references into categories.
	Categorize References > Configure Categories This allows you to define the categories used and to assign which references appear under each category.
	Instant Formatting is Off > Turn Instant Formatting On Your reference list will automatically update as new citations are added to a document.
	Instant Formatting is Off > Configure Instant Formatting... Allows you to configure the Instant Formatting settings.
	Configure Bibliography Click the arrow in the bottom right corner of the Bibliography section to display a tabbed dialog of formatting and layout options.




Tools Group

	Export to EndNote > Export Traveling Library Create an EndNote library from the references used in your paper.
	Export to EndNote > Export Word Citations Create an EndNote library from the Word citations found in the document.
	Export to EndNote > Export Word Master List Create an EndNote library from the Word master list of citations.
	Preferences Change general Cite While You Write preferences, change the EndNote keyboard shortcuts available in Word, change figure and table settings, or switch to EndNote Web Cite While You Write.
	EndNote Help Display help about Cite While You Write features.

8.2 CWYW commands in EndNote

The CWYW commands are activated only when Word is running and CWYW support is installed.

The toolbar in EndNote contains three buttons for CWYW:

Button	Description
	<ul style="list-style-type: none"> • Insert Citation: If one or more references are selected in your EndNote library, this command inserts them as citations at the current cursor location in, and returns control, to your Word document.
	<ul style="list-style-type: none"> • Format Bibliography: This command returns control to the Word document and activates the Format Bibliography icon on the EndNote ribbon.
	<ul style="list-style-type: none"> • Return To Word Processor: Returns control to the Word document.

The CWYW commands are also available in a drop-down list in EndNote:

- From the **Tools** menu, select **Cite While You Write [CWYW]**.

The drop-down list also includes two commands not on the EndNote toolbar:

- **Import Travelling Library**
- **CWYW Preferences**

Both commands return control to the Word document and activate the corresponding icon on the EndNote ribbon.

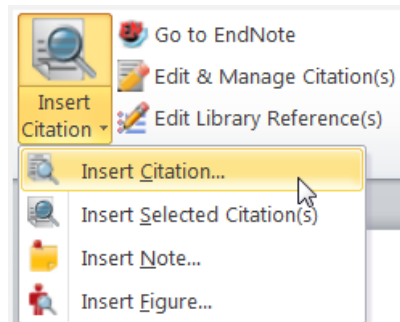
8.3 Inserting citations in your document

Important: **Before inserting citations, make sure that you have a backup copy of your original document/manuscript.**

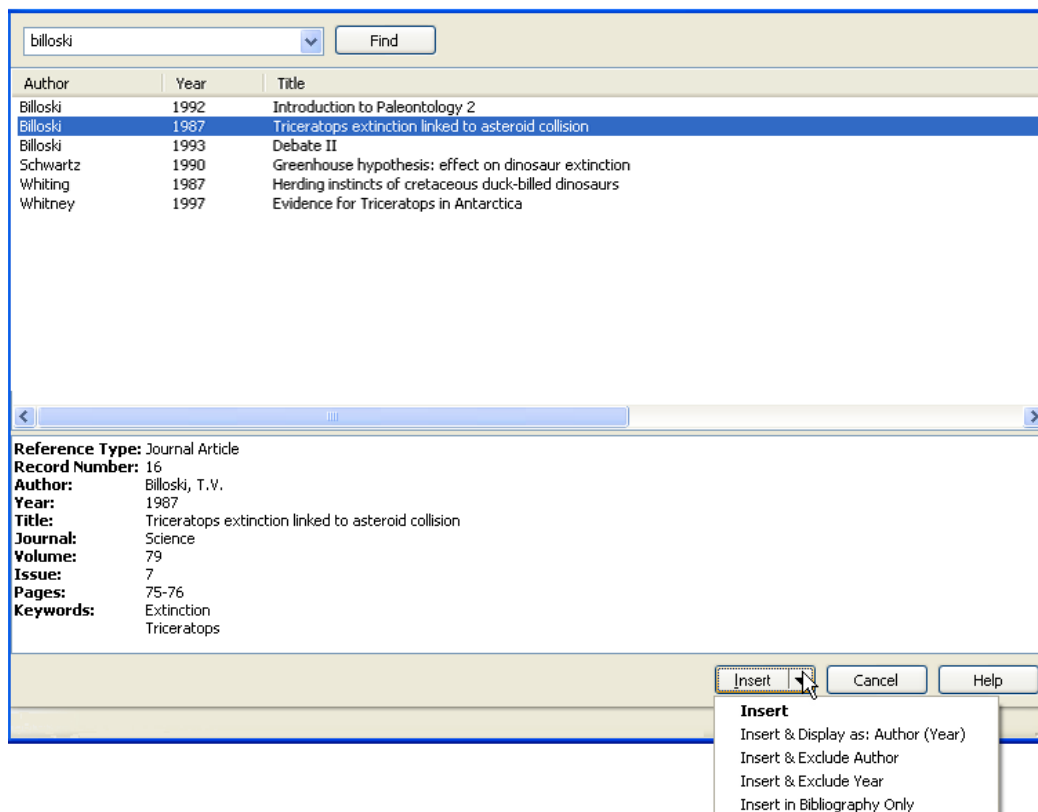
Make sure the relevant EndNote library is open.

8.3.1 Using the Insert Citation command in Word

1. Move the cursor to the required position for the citation in your document.
2. From the EndNote ribbon Citations group, expand **Insert Citation** and click on **Insert Citation...**



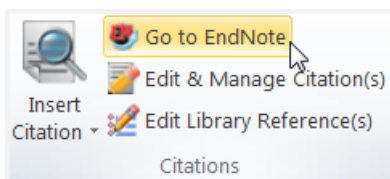
3. Type a term in the box and click on **Find**.



4. EndNote will display matching references.
5. Click to highlight the required reference(s).
6. Click **Insert** to insert the reference(s) in the text. The following options are also available:
 - **Insert & Display as: Author (Year)** – this will display the author's name outside the parentheses
 - **Insert & Exclude Author** – the author will not appear if you are using an Author-Date output style
 - **Insert & Exclude Year** – the year will not appear if you are using an Author-Date output style
 - **Insert in Bibliography Only** – a citation will not appear within the text, but the reference will appear in the bibliography

8.3.2 Inserting citations from EndNote

1. Move the cursor to the required position for the citation in your document.
2. From the EndNote ribbon Citations group click on **Go to EndNote**.



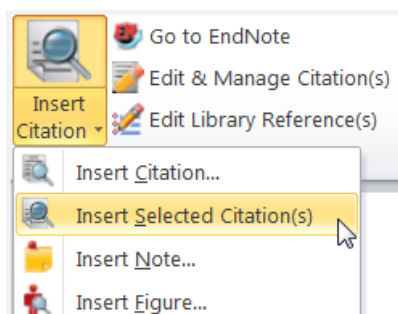
3. In your EndNote library click to highlight the required reference(s).

4. From the EndNote toolbar select **Insert Citation**.



If you are not sure that the cursor is in the correct position in your document do not use the Insert Citation button. Instead:

1. From the EndNote toolbar select **Return To Word Processor**.
2. Move the cursor to the required position for the citation in your document.
3. From the EndNote ribbon Citations group, expand **Insert Citation** and click on **Insert Selected Citation(s)**.



8.4 Formatting a bibliography

How your newly inserted citations appear in your document depends on whether Instant Formatting is turned on or off.

If Instant Formatting is turned off the citation will appear unformatted:

This is a citation {Billoski, 1987 #46}

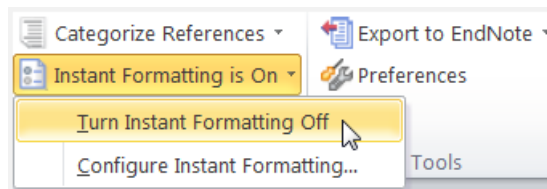
If Instant Formatting is turned on the citation will appear formatted using the current output style selected in EndNote:

This is a citation (Billoski 1987)

Billoski, T. V. (1987). "Triceratops extinction linked to asteroid collision." *Science* **79**(7): 75-76.

It is useful to have Instant Formatting turned on if you want to see your citations formatted every time you add a new one. However, it can cause problems in Word if you have a large number of citations in your document so you may wish to turn it off temporarily.

From the EndNote ribbon Bibliography group click on the **Instant Formatting is On/Off** to turn it on/off.

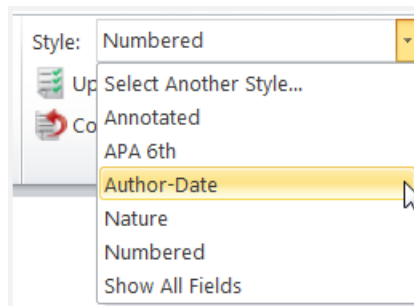


8.4.1 Output style

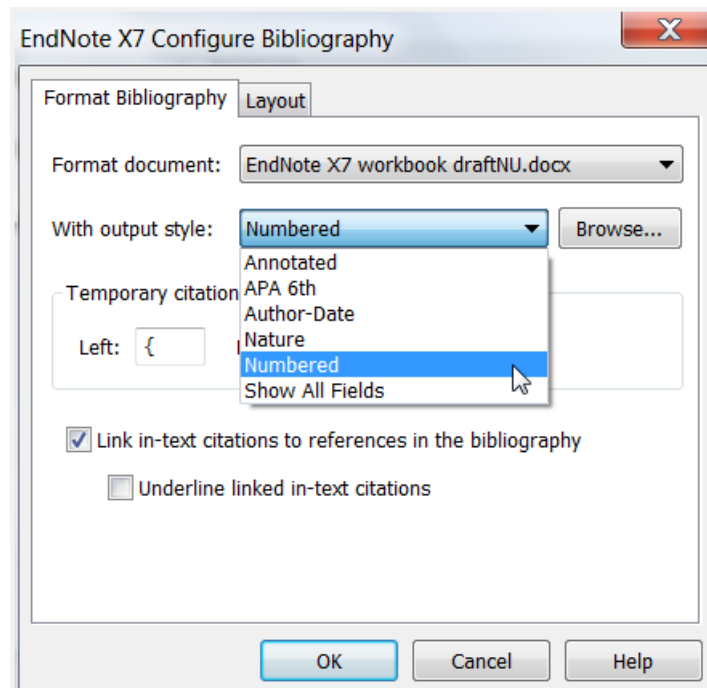
The output style controls the appearance of citations in the text and references in the bibliography, including:

- text attributes, e.g. bold, underline, italic, capitalisation.
- author name format, number of authors before 'et al'.
- fields appearing in the bibliography for each reference.

To select an output style use the drop-down list in the EndNote ribbon (Bibliography group):

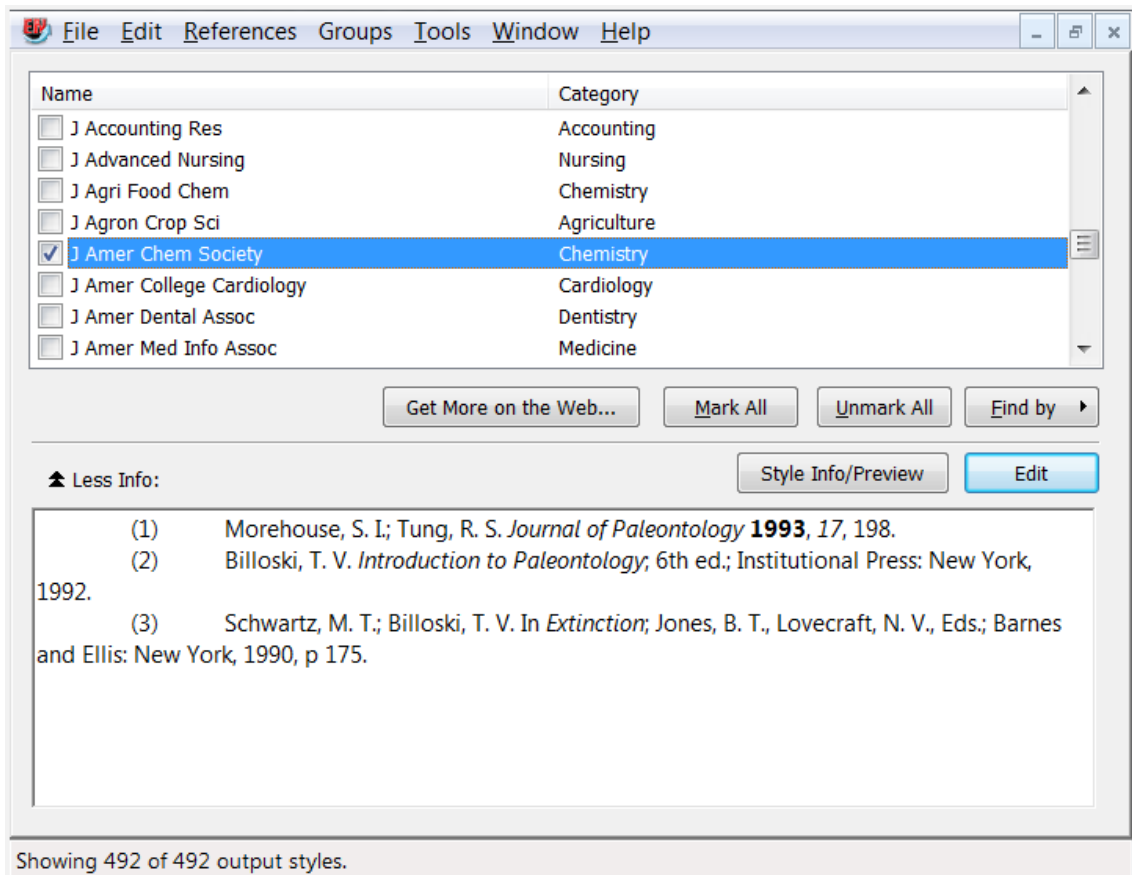


Alternatively, click on the arrow icon in the bottom right corner to display the Configure Bibliography window and choose an output style:



EndNote comes with many available styles, to search for one that matches your desired format:

1. Go to EndNote
2. From the **Edit** menu, select **Output Styles**
3. Select **Open Style Manager**



4. Click on the **Style Info/Preview** button.
5. Click on a name to see a preview of sample references formatted in that style.
6. Tick the box beside your favourite styles to make them appear in the 'Style' drop-down list in the Bibliography section of the toolbar and the Format Bibliography window.

Additional styles can be downloaded from the EndNote support website, click on **Get More on the Web** to access these.

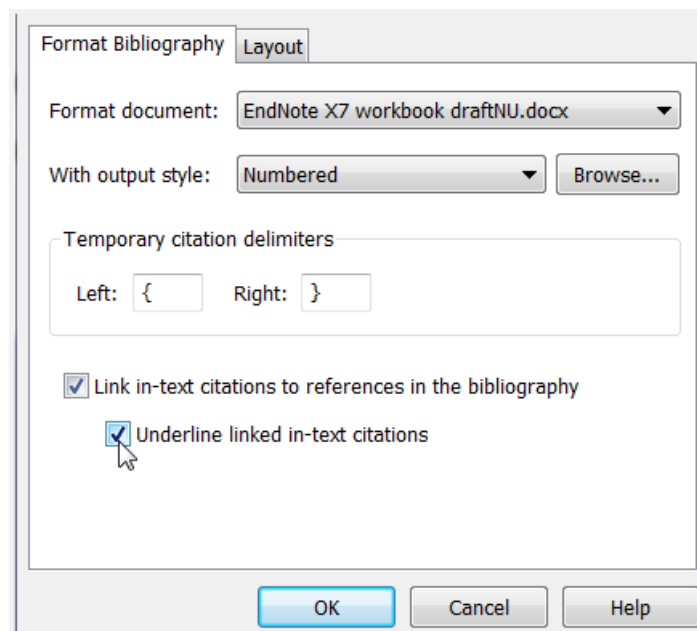
8.4.2 Layout

The Layout tab (in the Configure Bibliography window) controls the appearance of the bibliography, including:

- font, size
- title, title formatting
- start number
- indentation and line spacing

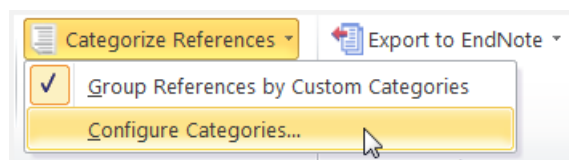
8.4.3 Activating hyperlinks between in-text citations and the reference list

In-text citations contain hyperlinks to the references in the bibliography. To activate these so that they are visible tick the box **Underline linked in-text citations**:

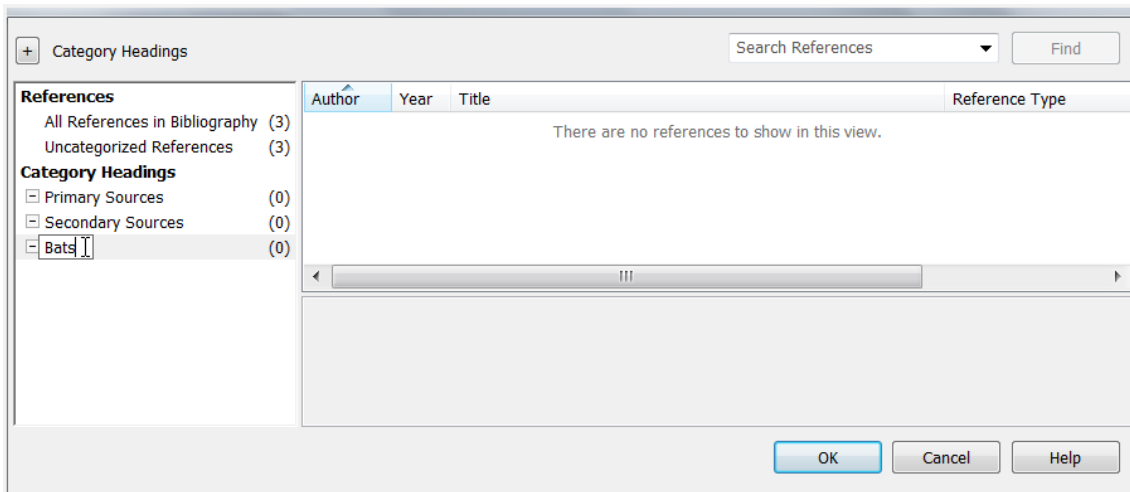


8.4.4 Categorize References

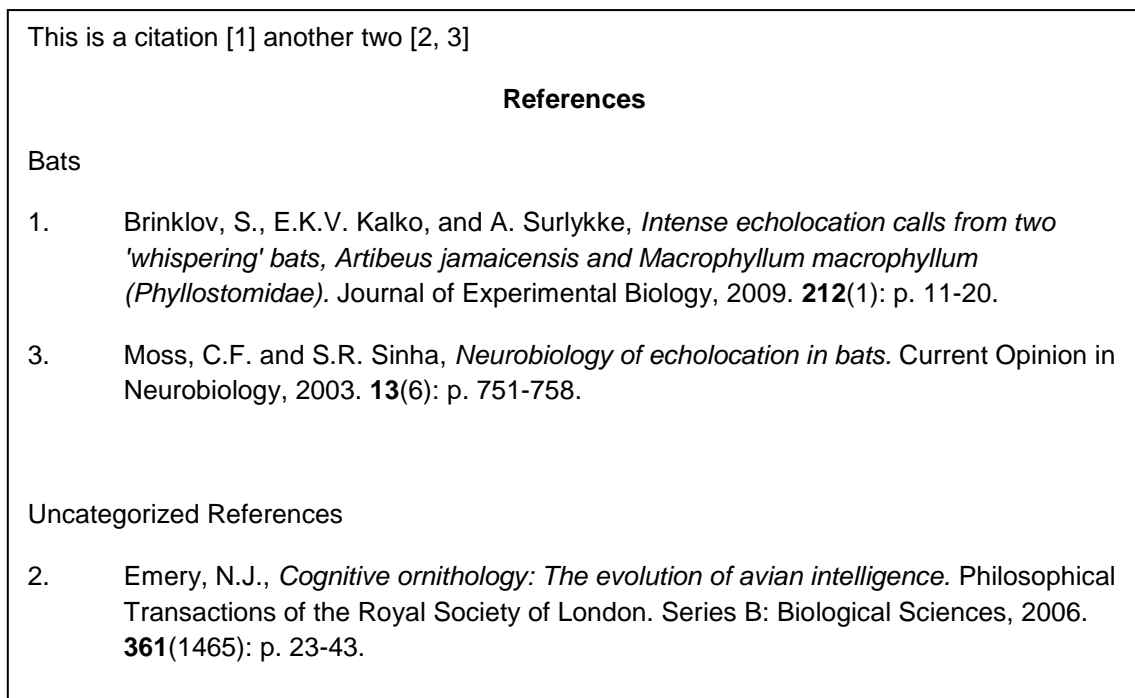
You can divide your bibliography into groups of references listed under different headings which you can specify. In the Bibliography group click on **Configure Categories...** to specify the headings:



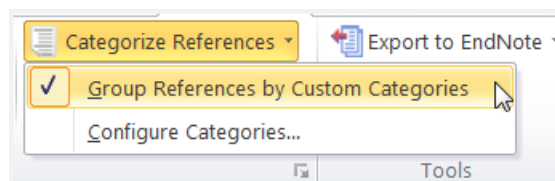
Click on the plus sign on the left to add a heading and give it a name; Bats is the new Category Heading in the image below:



To add references click on **All References in Bibliography** and then drag the desired references to a category heading. Click OK and your references will be automatically divided into categories:

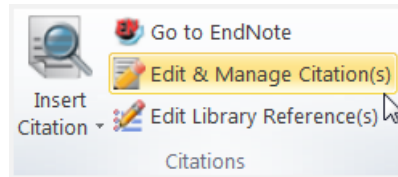


To remove the Category Headings click on Group References by Custom Categories to de-select this option:

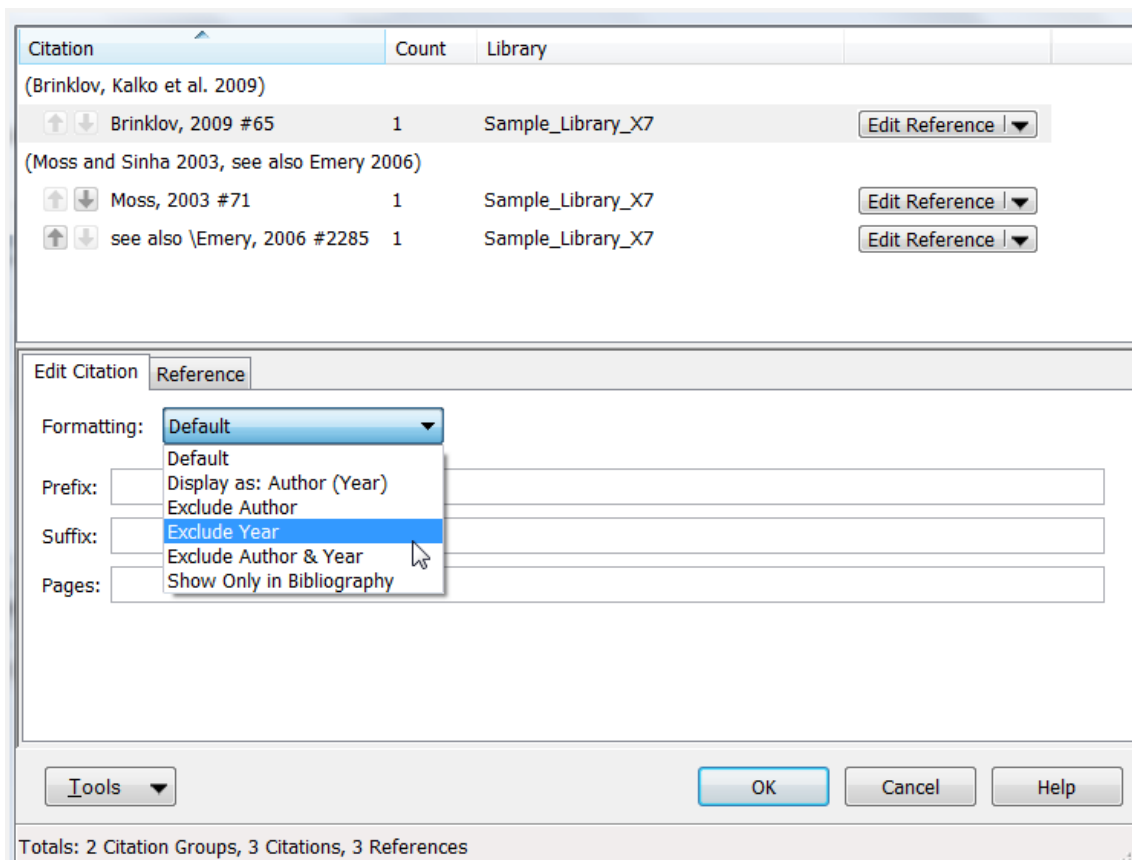


8.5 Editing and managing citations

Use the **Edit & Manage Citation(s)** option (Citations group) to modify the way an individual citation appears in the text:



In the following example the year is excluded from the *Brinklov* citation:



The screenshot shows the EndNote software interface. At the top, a table lists citation groups and their references. Below this, the 'Edit Citation' dialog box is open, showing the 'Reference' tab. A dropdown menu is open for the 'Suffix' field, with 'Exclude Year' selected. The 'Tools' dropdown is set to 'Tools', and the 'OK' button is highlighted.

Citation	Count	Library	
(Brinklov, Kalko et al. 2009)			
↑ ↓ Brinklov, 2009 #65	1	Sample_Library_X7	Edit Reference ▼
(Moss and Sinha 2003, see also Emery 2006)			
↑ ↓ Moss, 2003 #71	1	Sample_Library_X7	Edit Reference ▼
↑ ↓ see also \Emery, 2006 #2285	1	Sample_Library_X7	Edit Reference ▼

Edit Citation Reference

Formatting: Default ▼

Prefix:

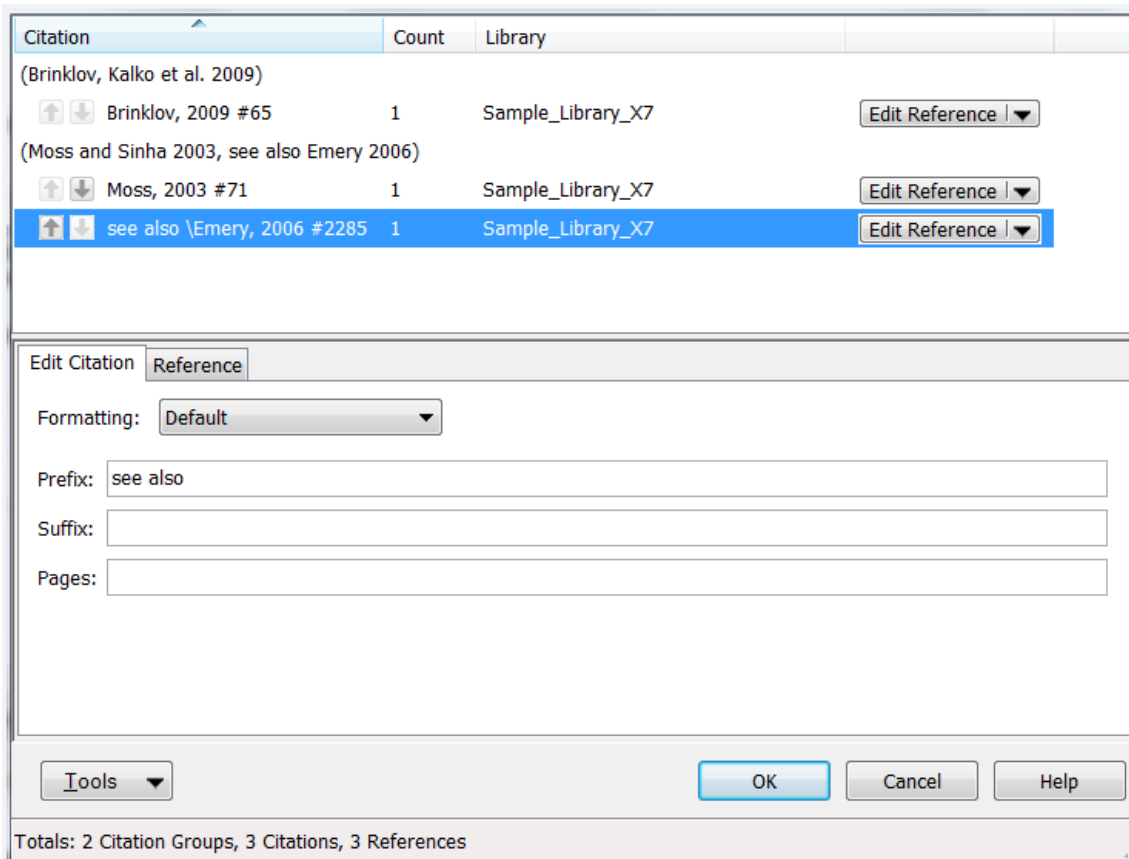
Suffix: Exclude Year

Pages:

Tools ▼ OK Cancel Help

Totals: 2 Citation Groups, 3 Citations, 3 References

In this example a prefix is added to the *Emery* citation.



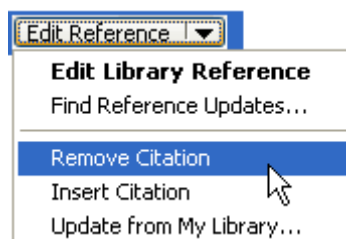
The change only affects the display of the edited in-text citations.

[Note: the document has been reformatted using the Author-Date output style]

This is a citation (Brinklov, Kalko et al. 2009) and another two (Moss and Sinha 2003, see also Emery 2006)

Anything typed in the **Prefix** and **Suffix** boxes will always be displayed in the in-text citation. Use of the **Pages** box is determined by the output style.

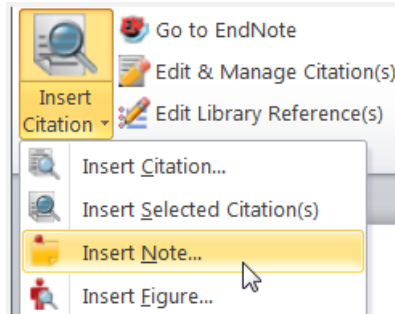
Citations can also be inserted and deleted from the **Edit Reference** drop-down menu within the **Edit & Manage Citation(s)** option:



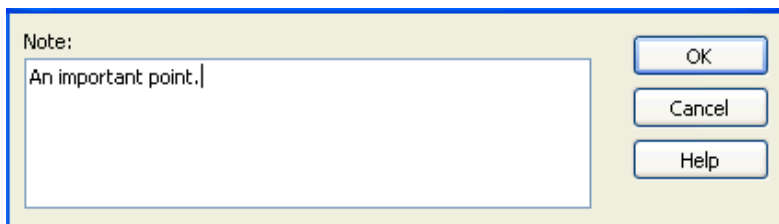
8.6 Inserting notes in your document

If you are using a numbered output style you can use EndNote to insert notes into your text.

1. From the EndNote ribbon Citations group, expand **Insert Citation** and click on **Insert Note**.



2. Type the note text into the box and click **OK**.

A screenshot of the 'Insert Note' dialog box in EndNote. It features a text area with the text 'An important point.' and three buttons: 'OK', 'Cancel', and 'Help'. The 'OK' button is highlighted with a blue border.

This is a citation [1] and another two [2, see also 3] and note [4]

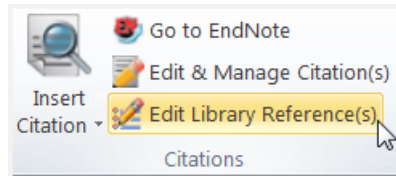
References

1. Brinklov, S., E.K.V. Kalko, and A. Surlykke, *Intense echolocation calls from two 'whispering' bats, Artibeus jamaicensis and Macrophyllum macrophyllum (Phyllostomidae)*. Journal of Experimental Biology, 2009. **212**(1): p. 11-20.
2. Moss, C.F. and S.R. Sinha, *Neurobiology of echolocation in bats*. Current Opinion in Neurobiology, 2003. **13**(6): p. 751-758.
3. Emery, N.J., *Cognitive ornithology: The evolution of avian intelligence*. Philosophical Transactions of the Royal Society of London. Series B: Biological Sciences, 2006. **361**(1465): p. 23-43.
4. An important point.

8.7 Editing library references

Use the **Edit Library Reference(s)** option to edit a reference in the EndNote library.

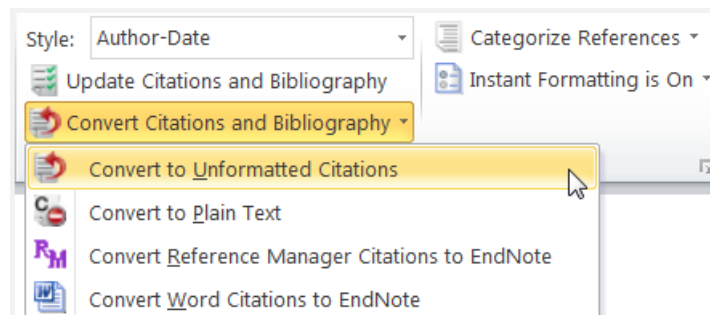
1. Click on the in-text citation for the reference to be edited.
2. Click on **Edit Library Reference(s)** (Citations group).



3. You will be taken back to EndNote where the required reference will be open ready for editing.
4. Close and save the reference.
5. Changes will not be displayed in the document until you reformat the bibliography.

8.8 Unformatting citations

Use the **Convert to Unformatted Citations** option (Bibliography group) to remove the bibliography and formatted citations in a document.



The unformatted citations will remain, including any modifications made using the Edit Citation(s) option:

This is a citation {Brinklov, #65} and another two {Moss, 2003 #71;see also \Emery, 2006 #2285}

Removing formatting from citations can be useful if you are using a numbered output style and temporarily wish to see the author and date in the in-text citations. However, removing formatting also deletes the travelling library (see below) so you must have your EndNote library open before you can reformat the citations and bibliography.

8.9 *Field codes and the travelling library*

Field codes are placed in and around all formatted citations and the bibliography. They allow EndNote to format, unformat and reformat citations within a document.

Normally they are hidden, their appearance is controlled by settings within Word. If inadvertently displayed, press **Alt+F9**.

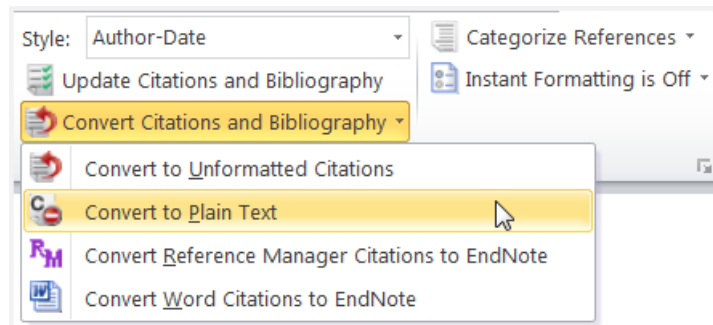
8.9.1 Removing field codes

You may need to remove field codes from your document:

- If requested by a publisher before submission.
- If sharing the document with a colleague using an incompatible word processor.

To remove field codes:

1. From the EndNote ribbon Bibliography group, expand **Convert Citations and Bibliography** and select **Convert to Plain Text**.



2. If you have not already saved your document you will be prompted to do so.
3. You will be asked to confirm that you wish to proceed.
4. EndNote will create a copy of your document, identical in format, but without field codes or the travelling library.

8.9.2 The Travelling Library

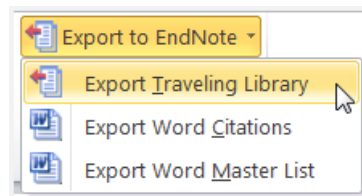
When you format a citation, EndNote adds field codes containing reference information to the document. This reference information forms a travelling library that contains all the references cited in the document.

When citations are reformatted, the travelling library will be used only if the EndNote library is not open.

If you unformat citations in a document, the travelling library is removed. To reformat the citations you will have to open the EndNote library first.

If you receive a document which includes formatted citations you can export the references from the travelling library into your own EndNote library:

1. From the EndNote ribbon Tools group, expand **Export to EndNote** and select **Export Traveling Library**.

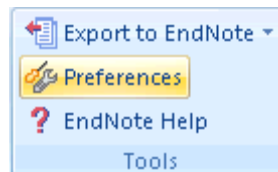


2. Specify an existing or new library to export to, then click **OK**.
3. You will see a message indicating that the export is complete.
4. Go to EndNote to see the exported references in your library.

8.10 Inserting figures in your document

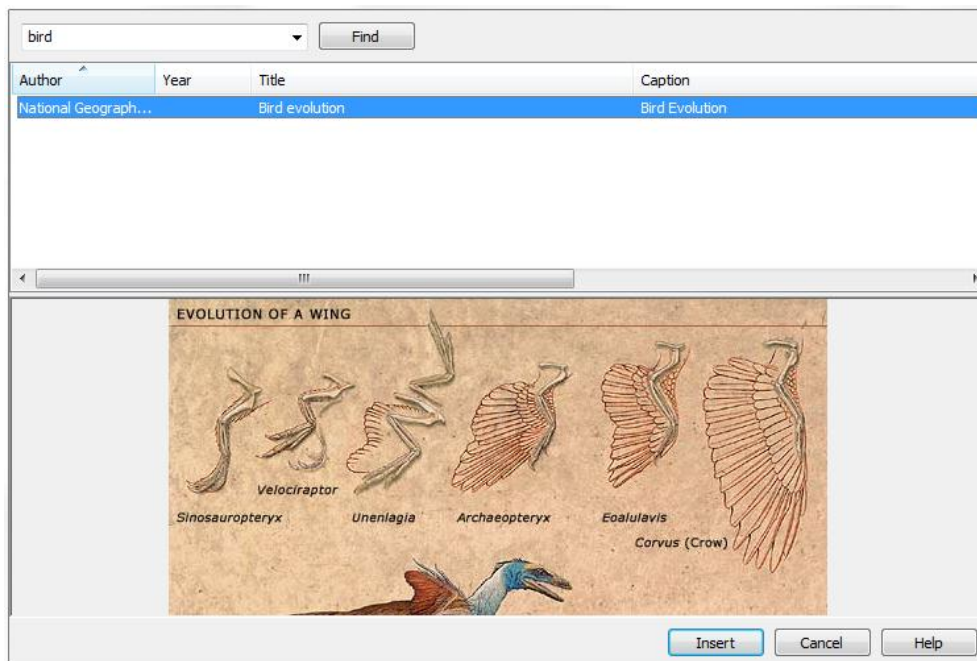
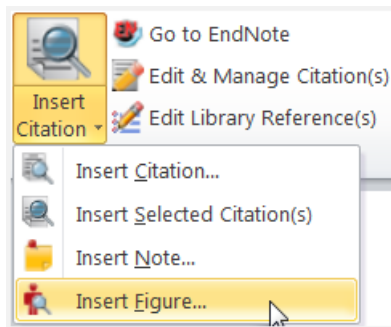
As shown in the section on adding references manually, EndNote can be used to store images such as figures, equations, charts or tables. Using CWYW, these images with captions can be inserted into your document.

The positioning of the image and caption is controlled by the output style and by the **Preferences** option in the ribbon (Tools group):



To insert a figure into your document:

1. Move the cursor to the point in the document where the figure is to be cited.
2. From the EndNote ribbon Citations group, expand **Insert Citation** and select **Insert Figure...**



3. Use the box and **Find** button to locate the required figure, highlight the one to be inserted, then click the **Insert** button.

The image will be inserted into the document and cited in the text:

This is a citation [1] and another two [2, see also 3] and note [4] and a figure (Figure 1)

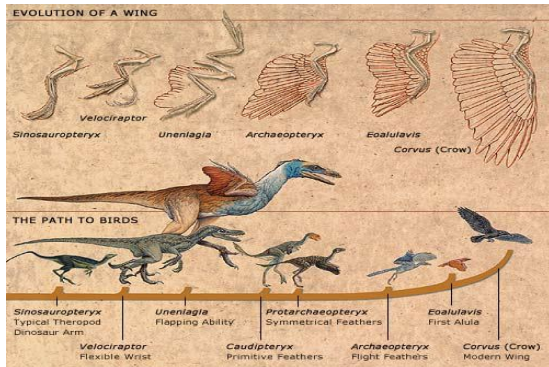


Figure 1. Bird Evolution

References

1. Brinklov, S., E.K.V. Kalko, and A. Surlykke, *Intense echolocation calls from two 'whispering' bats, Artibeus jamaicensis and Macrophyllum macrophyllum (Phyllostomidae)*. Journal of Experimental Biology, 2009. **212**(1): p. 11-20.
2. Moss, C.F. and S.R. Sinha, *Neurobiology of echolocation in bats*. Current Opinion in Neurobiology, 2003. **13**(6): p. 751-758.
3. Emery, N.J., *Cognitive ornithology: The evolution of avian intelligence*. Philosophical Transactions of the Royal Society of London. Series B: Biological Sciences, 2006. **361**(1465): p. 23-43.
4. An important point.

9. Getting Help

If you encounter a problem when using EndNote there are several ways in which you can get help:

- Use the online facilities by clicking on **Help** from within EndNote.
- Use the **EndNote Manual** supplied with the software under **Help > Getting Started Guide**.
- Refer to the Library's "Reference Management" website at:

<http://www3.imperial.ac.uk/library/subjectsandsupport/referencemanagement>

- Contact the Library:
Online: *via ASK the Library*
Telephone +44 (0)20 7594 8810

You will need to describe the problem, identify the version of EndNote, and which operating system you are using.

- Refer to the EndNote website (downloads of additional connection files and output styles are also available at this website) at:

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

- Search the EndNote Knowledge Base at:

<http://endnote.com/support/search-knowledgebase>

- Join or search the EndNote Community Forum at:

<http://community.thomsonreuters.com/t5/EndNote/ct-p/endnote>

Appendix A: Using Term Lists

EndNote's term lists are used to store terms such as keywords, author names, or journal names.

You can use these stored terms when entering references to improve consistency and accuracy of information in your library.

You can also use the Journals term list to store abbreviated journal names that EndNote can substitute for the full journal name in a bibliography.

The term lists are saved in the *.Data* folder of the corresponding library. If this folder is missing the term lists for that library will not work correctly.

- Term lists are stored with the library and therefore are specific to only that library.
- A library must be open before you can edit its term lists.
- Entire term lists can be exported and imported.
- By default, term lists are automatically updated from the terms entered in your references. New terms appear in red text in the Reference window.
- Term lists can be used with the "Auto-entry" feature on or off. By default, this option is turned on so that EndNote will suggest the closest matching term as you type in a reference.
- The Journals term list stores various forms of journal names that can be used when creating bibliographies.

The three standard Term Lists built into Endnote: Authors, Journals and Keywords are managed automatically.

However, this feature can be disabled if required. From the **Edit** menu select **Preferences** and click on **Term Lists** to see the options for controlling the way all lists work.

Importing terms into Term Lists

EndNote provides lists of journal names and abbreviations, including lists for Chemical, Medicine (Index Medicus), and the Humanities.

If you are interested in using the abbreviated forms of the journal names in your bibliographies, you can import them into your term lists and adjust your styles to use the abbreviations.

To import a text file that contains terms:

1. From the **Tools** menu select **Define Term Lists**.
2. Select the **Lists** tab, ensure the correct list is highlighted, and click on **Import List**.
3. Select the text file to be imported and click **Open**. EndNote's lists are in the Terms Lists folder in the EndNote X7 folder. The new terms are imported and sorted alphabetically into the existing term list. This import must be done for each library that you want to use these terms.

Appendix B: Creating a bibliography from multiple documents

Sometimes it is more convenient when working on a large text to split it into separate documents, for example, one document for each chapter. You then need to produce one bibliography to include all the chapters.

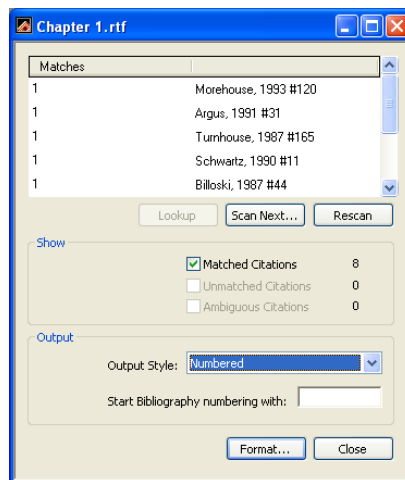
You can use EndNote's *Format Paper* option or Word's *Master Document* feature to generate a single bibliography from multiple documents. This allows you to create a cumulative bibliography from any number of chapters. (For details of Word's Master Document feature consult the Help available in Word.)

To generate a single bibliography using EndNote's Format Paper option:

1. In each of your documents, or chapters, insert your citations to link them to references in an EndNote library. If you use the Cite While You Write feature, make sure you click on the **Convert to Unformatted Citations** (Convert citations and bibliography) option. The citations should look like this:

Where the other species {Schwartz, 1990 #11} arose is a mystery.

2. Save each document in Rich Text Format (RTF). Close each document.
3. In EndNote, click on **Tools**, then **Format Paper**, then **Format Paper**.
4. When prompted, locate the first RTF document to be scanned. The following screen is then displayed:



5. Click on **Scan Next** and locate the next RTF document to be scanned. Repeat until all documents have been scanned
6. Select the **Output Style** you require then click on **Format**.
7. You will be prompted to save each document with a new name. Each document will contain formatted citations but only the last document scanned will contain the formatted bibliography at the end.

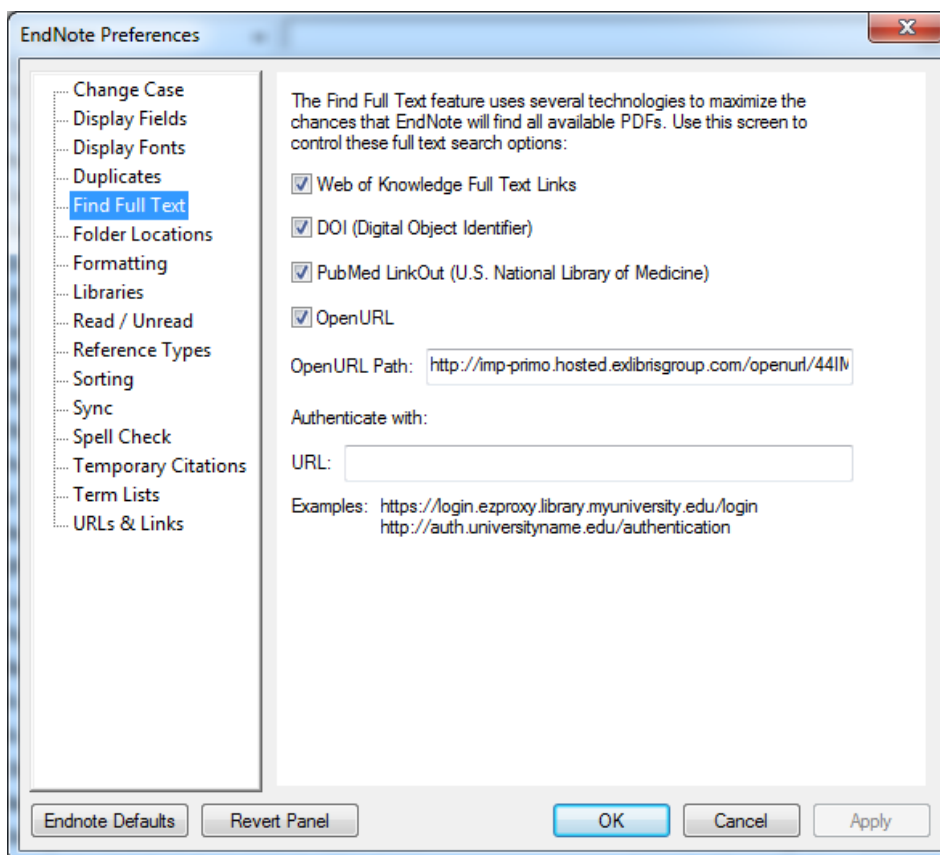
Appendix C: Configuring Full Text and OpenURL settings

EndNote can automatically locate and download full text files by accessing several sources, including: DOI (Digital Object Identifier), PubMed LinkOut, and ISI Web of Knowledge Full Text Links. EndNote will try to use all of these methods to optimise the likelihood of finding full text files associated with your bibliographic records.

Since some sources accessed may require authentication, you are likely to get better results using Find Full Text when connected to the Imperial College network either on campus or via VPN.

To optimise retrieval of Full Text articles:

1. Go to **Edit > Preferences** and select **Find Full Text**.
2. Ensure that all the search option boxes are ticked.
3. In the OpenURL Path box enter:
http://imp-primo.hosted.exlibrisgroup.com/openurl/44IMP/44IMP_services_page
4. Click **OK**.



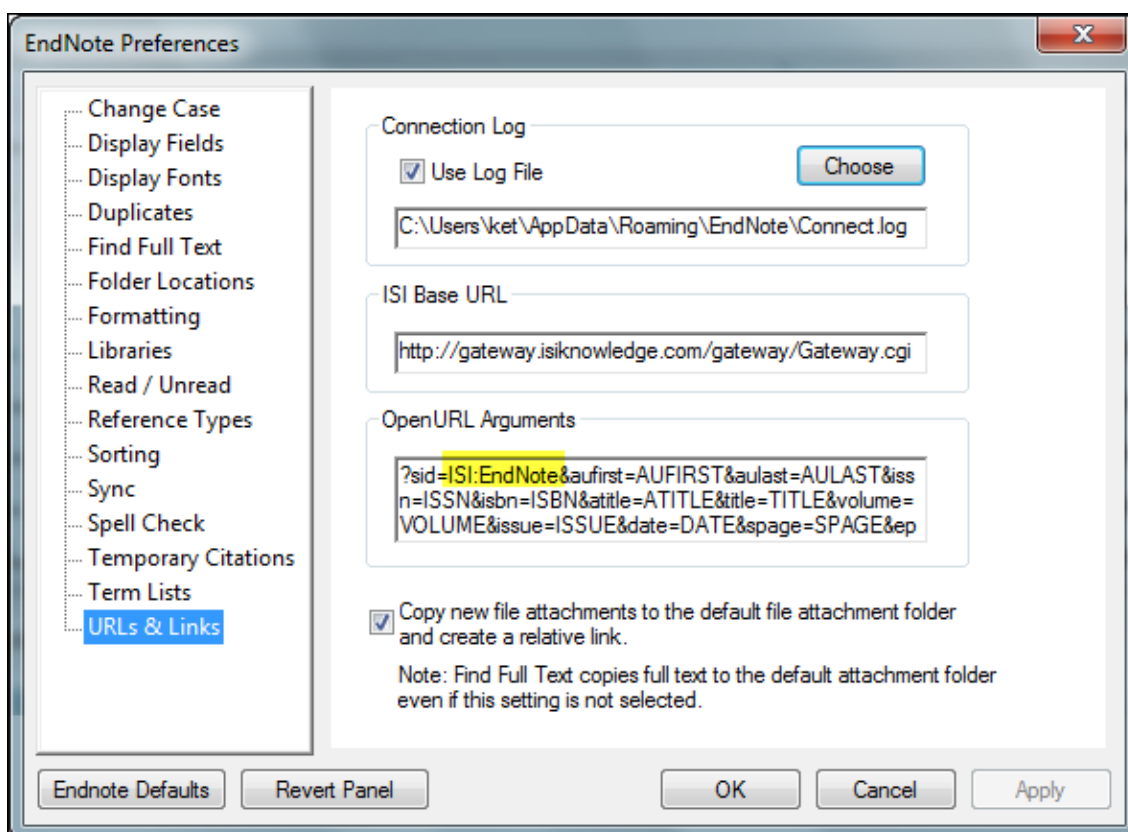
The **OpenURL Link** command on the **References** menu starts your default web browser and displays related record links in the browser window. It connects to an OpenURL standard syntax server and uses these OpenURL preferences along with data in your EndNote record to find related online references and full-text sources if available.

To connect to the Library OpenURL server:

1. Click on **Edit**, then **Preferences**.
2. Click on **URLs & Links**.
3. In **OpenURL Arguments** change the **sid** to ISI:EndNote.
The new arguments should look like this:

```
?sid=ISI:EndNote&aufirst=AUFIRST&aulast=AULAST&issn=ISSN&isbn=ISBN&atitle=ATITLE&title=TITLE&volume=VOLUME&issue=ISSUE&date=DATE&spage=SPAGE&epage=EPAGE
```

4. Click **OK**.



Appendix D: EndNote versions and synchronising libraries

There are three main versions of EndNote – EndNote Desktop, EndNote Online (which includes a Basic version) and the EndNote for iPad app. The Desktop version synchronises with Endnote Online which synchronises with the iPad app. The iPad app needs an EndNote Online account to synchronise with the Desktop edition.

Having EndNote Desktop ‘upgrades’ EndNote Basic (with WoK) and EndNote Basic to EndNote Online (Desktop) which increases:

5. the number of references able to be downloaded and stored in the Online Library
6. the amount of storage space available
7. the number of bibliographic output styles you can use.

It is possible to sync references and groups from Desktop and the iPad app. Note: Group sets and smart groups will not synchronise.

Synchronise in EndNote Desktop

1. In EndNote (desktop) click the **Sync** button on the toolbar:
2. Enter your EndNote Online account credentials
3. You will need to register the first time you sync your libraries
4. Click on **Sync**



Under Edit/Preferences you can set when EndNote automatically syncs your references.

EndNote for iPad

This paid-for app enables some search functionality, synchronises with EndNote Online, enables the annotation and storage of PDF documents and linking to Dropbox.



To link the iPad app to EndNote Online click on the **Settings** icon to enter your EndNote online account details

To sync with EndNote Online click on the **Sync** button.

For further information about the iPad app see: <http://endnote.com/ipad>

